CallPilot

Upgrade Guide

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Upgrade Guide

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Chapter 1

CallPilot upgrade overview

Introduction

This guide explains how to upgrade a CallPilot server from CallPilot Release 1.07 to CallPilot Release 2.02.

If the server is running a release prior to Release 1.07, you must upgrade the server to Release 1.07 before you can upgrade it to Release 2.02.

Supported upgrade paths and scenarios

You can upgrade your CallPilot server software to Release 2.02 from

- Release 1.07.09 (SU3 or SU4)
- Release 2.01
- Release 2.01 SU1

A CallPilot server that is running Release 1.05 or 1.06 must be first upgraded to Release 1.07 *before* being upgraded to Release 2.02. For instructions on upgrading the server to CallPilot 1.07, refer to the CallPilot 1.07 *General Release Bulletin* and the CallPilot 1.07 *Installation and Configuration* NTPs.

You cannot downgrade to a previous release of CallPilot software.

You can perform the upgrade before you perform a feature expansion or in conjunction with performing a feature expansion. For instructions on performing a feature expansion, refer to Part 4 of the *CallPilot 2.0 Installation and Configuration* binder.

Note: Nortel Networks occasionally releases service updates that contain problem fixes and feature enhancements. You do not need a keycode to install service updates. The section of this guide that is relevant to your upgrade path provides instructions for installing service updates.

Administration software upgrade

You cannot use the CallPilot 1.07 administration client software to monitor and maintain the CallPilot 2.02 server. You cannot upgrade the CallPilot 1.07 administration client software to CallPilot 2.02.

When you upgrade the CallPilot server to Release 2.02, the CallPilot 2.02 web-based CallPilot Manager software is installed automatically. Use CallPilot Manager to administer the CallPilot server from any personal computer (PC) that has a web browser installed and can connect to the CallPilot server over the IP network.

Note: You can install CallPilot Manager on a stand-alone web server. For more information, see Chapter 5, “Installing CallPilot administrative software on a stand-alone web server.”

Cautions

ATTENTION

Do not launch or run programs or utilities while CallPilot software is being installed, upgraded, or subjected to a Performance Enhancement Package (PEP). Also, do not use Windows NT Explorer to copy files or scan disk drives during an upgrade as this can cause the upgrade to fail.

Notes:

- If, during an upgrade, a file or database cannot be updated, and you have launched other programs, close the launched programs and rerun the operation. You do not have to restart the server. Contact Nortel Networks technical support if an error is reported during the database update.
- You must restart the server at many steps throughout the upgrade process. Use the following restart procedure:
  1. Press Ctrl+Alt+Delete.
  2. Choose Shutdown from the Windows NT Security window.
  3. From the Shutdown Computer dialog box that appears, choose Shutdown and Restart.
  4. Click OK.

Keycode

To perform an upgrade from CallPilot 1.07.09, ensure that you have a CallPilot 2.02 keycode. A keycode label with dongle and feature information is provided with the software CD-ROMs.

You do not need a keycode to perform a CallPilot 2.01 to CallPilot 2.02 upgrade.

Software CD-ROMs

Ensure that you have the complete set of CD-ROMs. The following table identifies the CD-ROMs that are provided in the CallPilot 2.02 software packages:

PEC	CPC	Label	Version	Notes
NTUB43AE	A0510775	2.02 PEP CD-ROM	2.01.27.05	See footnote [a] at the end of this table.
NTUB41AE	A0510776	2.02 Desktop Client Software and Updates CD-ROM	2.01.27.05	See footnote [b] at the end of this table.
NTUB40AE	A0510777	2.02 Server Software CD-ROM	2.01.27.05	
NTUB44AE	A0510778	2.02 Language Prompts CD-ROM - Americas (4 languages, CD-ROM 1 of 3)	2.01.26.05	See footnote [c] at the end of this table.
NTUB44BE	A0510779	2.02 Language Prompts CD-ROM - EMEA (14 languages CD-ROM 2 of 3)	2.01.23.10	
NTUB44CE	A0510780	2.02 Language Prompts CD-ROM - Asia Pacific (8 languages, CD-ROM 3 of 3)	2.01.23.09	
NTUB47AE	A0510979	2.02 OS Recovery CD-ROM (bootable, WinNT)	2.01.27.05J	See footnote [d] at the end of this table.
NTUB49AB	A0510980	2.02 OS Recovery CD-ROM (for Upgrades only)	2.01.27.05J	
NTUB47BG	A0510783	2.02 OS Upgrade CD-ROM (bootable, no WinNT)	2.01.27.05J	
NTRG19AG	A0878010	2.02 Documentation CD-ROM Package	not applicable	
NTUB48AB	A0510781	2.02 My CallPilot software and updates CD-ROM	2.01.27.05	

a. Includes the *Documentation Addendum* and updates to the OS Recovery CD-ROM.

b. The Desktop Messaging CD-ROM contains all languages.

c. Not all languages will be available at general availability. Languages will be delivered periodically as localization completes. As well, regional CD-ROMs may not include all languages. Updated CD-ROMs will be made available as languages become available.

d. Which CD-ROM is shipped, either NTUB47AE/NTUB49AB, or NTUB47BE depends on which package was ordered.
— New system orders receive NTUB47AE - OS Recovery CD-ROM (which includes Windows NT). New system orders for any platform type include software package NTUB22AG - CallPilot 2.02 Base Server Software Package.
— Upgrade orders (NTZE31AC, NTZE32AC, and NTZE33AC) receive NTUB47BG - OS Upgrade CD-ROM (no Windows NT) and NTUB49AB (for Upgrade recovery purposes only).

Reference documents

Ensure that you have the latest documentation. You can acquire the latest documentation from the Nortel Networks web site at http://www.nortelnetworks.com/documentation.

Server model	Reference	CallPilot 1.07 PEC and CPC	CallPilot 2.02 PEC and CPC
200i	CallPilot 2.02 200i *Installation and Configuration Guide* Package	NTRG06AB A0877762	NTRG06AC A0516429
201i	CallPilot 2.02 201i *Installation and Configuration Guide* Package	NTRG01AB A0872125	NTRG01AC A0516431
702t	CallPilot 2.02 702t *Installation and Configuration Guide* Package	NTRG03AB A0872141	NTRG03AC A0516433
1001rp	CallPilot 2.02 1001rp *Installation and Configuration Guide* Package	NTRG04AB A0872146	NTRG04AC A0516435
1002rp	CallPilot 2.02 1002rp *Installation and Configuration Guide* Package	not applicable	NTRG05AC A0516437
All	*Planning and Engineering Guide* (available on the Documentation CD-ROM)	NTP 555-7101-101	NTP 555-7101-101
All	*CallPilot Monitoring and Security for Administrators* (available on the Documentation CD-ROM)	NTP 555-7101-307	not applicable
All	*CallPilot Administrator's Guide* (available on the Documentation CD-ROM)	NTP 555-7101-301	NTP 555-7101-301

To perform the upgrade

IF the CallPilot server is currently running	THEN go to
CallPilot 1.07	Chapter 2, "Upgrading from CallPilot 1.07.09 to CallPilot 2.02," on page 13.
CallPilot 2.01	Chapter 3, "Upgrading the CallPilot 2.01 server to CallPilot 2.02," on page 65.

Chapter 2

Upgrading from CallPilot 1.07.09 to CallPilot 2.02

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Overview

Introduction

You can upgrade your CallPilot server software from Release 1.07.09 (SU3 or SU4) to Release 2.02. A CallPilot server that is running Release 1.05 or 1.06 must first be upgraded to Release 1.07 *before* being upgraded to Release 2.02.

You cannot downgrade to a previous release of CallPilot software.

Carefully follow the upgrade procedures in this section. You may need to refer to the NTPs in the *CallPilot Installation and Configuration* binder for your server model for more information.

Note: The desktop messaging client installation is always considered an install and not an upgrade. When installing, all previous versions are overwritten during the install process except Release 1.06.07.11 clients and earlier. These clients should be uninstalled before you install the Release 2.02 desktop messaging clients.

CallPilot 1.07.09 to CallPilot 2.02 upgrade overview

Phase	Description	See
1	Complete the CallPilot Upgrade Readiness Checklist. This includes running the system precheck.exe utility on the CallPilot 2.02 OS Recovery CD-ROM.	“Phase 1: Completing the Upgrade Readiness Checklist” on page 16
2	Upgrade the Windows NT operating system. Click Start → Run to execute Z:\setup.bat.	“Phase 2: Updating the Windows NT operating system” on page 43
3	Upgrade the CallPilot server software. Click Start → Run to execute Z:\setup.exe. When you are done, manually restart the server.	“Phase 3: Upgrading the CallPilot 1.07 software to CallPilot 2.02” on page 54

Phase	Description	See
4	Apply any PEPs. ■ CallPilot server software: Click Start → Run to execute Z:\runme.exe. ■ CallPilot Manager software: Click Start → Run to execute Z:\cpmgrsetup.exe. When you are done, restart the server.	"Phase 4: Installing Performance Enhancement Packages" on page 60
5	Configure the CallPilot server. With Internet Explorer, connect to the following URL: http://<*server name or server IP address*>/cpmgr/login.asp where *server name* is the CallPilot server's computer name and *server IP address* is the CallPilot server's IP address. Run the Configuration Wizard, and then restart the system into service.	■ "Phase 5: Logging on to the CallPilot server with CallPilot Manager" on page 88 ■ "Phase 6: Running the Configuration Wizard" on page 92
6	Test the CallPilot upgrade. If the system is working as expected, complete other configuration tasks, as required.	"Phase 7: Completing post-configuration tasks" on page 105

Phase 1: Completing the Upgrade Readiness Checklist

Introduction

Use this checklist to ensure that your CallPilot server is ready for upgrade. This checklist enables you to

- avoid significant lost time and costs during the upgrade
- significantly reduce system downtime resulting from upgrade problems that might have been prevented

ATTENTION

To successfully upgrade a system from CallPilot 1.07 to CallPilot 2.02, you must complete the following detailed step-by-step procedures *exactly* as described. Failure to do so may result in a failed upgrade and require the system to be restored to its previous release from a current backup.

ATTENTION

Do not assume that an upgrade to CallPilot 2.02 will cure an unhealthy CallPilot system. If the CallPilot system is experiencing problems before you start the upgrade, those problems may cause the upgrade to fail. An upgrade failure can cause the system to be damaged beyond repair, and require you to reinstall the operating system, CallPilot software, or both.

Ensure that system problems are resolved before you begin the upgrade.

1. Ensure that a remote access connection can be established with the CallPilot server.

Dial-up connection

If the administrative PC is not on an IP network that is connected to the CallPilot server, establish a connection using Dial-Up Networking. Verify that you can establish a dial-up networking connection to the CallPilot server as follows:

1 Enter your client's dial-up networking applet.

2 Double-click the MAS icon.

If the icon is unavailable, create a MAS connection profile.

3 When prompted, enter the Windows NT logon ID and password.

4 Wait until the connection is established.

pcAnywhere connection

You must have pcAnywhere access to the server before you perform the upgrade. If a pcAnywhere session cannot be established, the operating system update portion of the upgrade may fail. In addition, if a problem occurs during the upgrade, a remote access connection for support purposes is not possible.

If a pcAnywhere session cannot be established with the CallPilot server, contact your Nortel Networks technical support representative to request assistance.

Verify that you can establish a pcAnywhere connection to the CallPilot server as follows:

1 Launch the pcAnywhere application on the client PC.

Note: The pcAnywhere host on the CallPilot server must be active so that the verification is completed successfully.

2 Double-click the remote control icon for the server.

If the icon is unavailable, create a server connection profile.

3 When prompted, enter the pcAnywhere logon ID and password.

2. Disconnect mapped network drives.

Nortel Networks supports a CallPilot 1.07 to CallPilot 2.02 upgrade from a locally connected CD-ROM drive only. Nortel Networks does not support the use of a network shared CD-ROM drive to upgrade the operating system or CallPilot server software.

To disconnect any mapped network drives, do the following:

1 Ensure that you are logged on to Windows NT as Administrator.

2 In Windows NT Explorer, right-click the mapped network drive, and then choose Disconnect.

3. Determine if hardware changes are required.

ATTENTION

Make sure that the COM2 port is not connected to any device. A device, such as a second modem or a Smart UPS unit, connected to the COM2 port causes the failure of the operating system setup.

1 *200i server only:* If the 200i server has more than 16 channels configured or will be adding the new E-mail-by-Phone feature, ensure that the system has enough CPU capacity to handle the increased load.

You can determine if the 200i server has enough CPU capacity by using the following engineering tools:

- Meridian Configurator (North and South America)
- NetPrice (Europe, the Middle East, Africa, and Asia)

- CallPilot Engineering Spreadsheet in Microsoft Excel

  This spreadsheet is available from the CallPilot area of the Partner Information Center (PIC) web site at http://my.nortelnetworks.com.

2 Verify that only Nortel Networks-approved hardware is installed on the CallPilot server.

You must remove any hardware that is not approved by Nortel Networks, such as extra add-in cards, internal modems, hard drives, or other peripheral devices.

3 Ensure that all hardware is working correctly.

If any hardware is not functioning correctly, arrange to have it either repaired, or removed.

4 Use the following table to determine if you need to perform a hardware change as part of the CallPilot 1.07 to CallPilot 2.02 upgrade:

IF the server is a	THEN
200i, 201i, 702t, 1001rp, or 1002rp server	ensure that the 702t, 1001rp, or 1002rp server is equipped with three primary disk drives. You can increase channel and storage capacity by performing a cross-platform migration to a larger server. **ATTENTION** If a migration from 201i to 702t is required, you must perform the migration while both servers are running CallPilot 1.07.

IF the server is a	THEN
702t or 1001rp server	do the following: **a.** Ensure that all MPB16 boards are installed in the lowest-numbered slots. Ensure that there are no empty slots between them. ■ The 702t server has cards in PCI slots 3 and 4. Slot 3 is the fourth PCI slot of five, numbered consecutively from the bottom of the server to the top. ■ The 1001rp server has cards in PCI slots 4 and 5. Slot 4 is the fourth PCI slot of twelve, numbered consecutively from left to right when viewed from the front of the server. The motherboard contains ISA slots on the left side and the SBC slot. PCI slot 1 is just to the right of the SBC. **b.** For servers with more than one MPB16 board and a single DS30X cable, ensure that the DS30X cable is connected to the lowest-numbered MPB16 board, as follows: ■ 702t: PCI slot 3 ■ 1001rp: PCI slot 4 (If you are facing the front of the server, this is slot 12 when you count all of the slots, including the SBC, from the left.) **ATTENTION** For 1001rp, this differs from a standard CallPilot 1.07 configuration, which had the cable connected to PCI slot 5. For more information, see “Connecting MPB16-4 boards to MGate cards” on page 124.
702t or 1001rp server (continued)	If changes are made to the MPB16 board position, DS30X cabling, or both, you must update the TN assignment data accordingly in the Configuration Wizard.
1001rp server	do the following: **a.** Ensure that the server contains a Diamond Stealth III video card. The Diamond Stealth III video card is labeled as “Diamond,” and has a blue VGA connector and black heat-sink. If the video card is not a Diamond Stealth III video card, contact your Nortel Networks technical support representative. **b.** Ensure that the MPB16-4 boards (NTRH20xx) are the correct version (rev-5) if the Intel chipset is used. For more information, refer to *CallPilot Product Bulletin 2002-095*.

5 Update the tape drive driver, if required.

If you are changing the tape drive for CallPilot 2.02, the new driver is on the CallPilot 2.02 OS Recovery CD-ROM or the CallPilot 2.02 OS Upgrade CD-ROM in the Z:\drivers\misc\tape folder.

ATTENTION

If the CD-ROM drive is not drive Z:\, reassign the CD-ROM drive to Z:\ as described in “Reassign the CD-ROM drive to drive Z (if required)” on page 25.

a. Click Start → Settings → Control Panel.

Result: The Control Panel appears.

b. Double-click the Tape Devices icon.

c. Click the Drivers tab.

d. Choose and remove the old driver, if present.

e. Click Add.

Result: The list of available tape drive device drivers appears.

f. Click Have Disk.

g. Insert the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM into the CD-ROM drive.

h. Type **z:\drivers\misc\tape** as the path, and then click OK.

Result: The system prompts you to select a device driver from the list.

i. Choose the driver for your tape drive, and then click OK.

Result: The system prompts you for the path to the OEM Tape Device files.

j. Type **z:\drivers\misc\tape** as the path, and then click Continue.

Result: The driver files are copied to the server.

k. Click OK twice to exit.

Result: You are prompted to restart the server.

l. Restart the server.

4. Validate the upgrade keycode label.

1 Click Start → Programs → CallPilot → System Utilities → System Information.

2 Ensure that the serial number on the keycode label (Sec. Dev. ID) matches the CallPilot serial number that appears on the CallPilot System Information dialog box.

If these two items do not match, your Nortel Networks customer support representative must generate a new keycode so you can upgrade the server.

3 Ensure that the feature limits displayed on the keycode label are greater than or equal to the feature limits displayed on the CallPilot System Information dialog box.

Features cannot be reduced. The number of channels can be reduced, but not to zero.

5. Gather the materials you need for the upgrade.

To perform an upgrade to CallPilot 2.02, you need the following items:

Items	Description
CallPilot 1.07 CD-ROMs	❒ CallPilot 1.07 Documentation CD-ROM
CallPilot 2.02 CD-ROMs	❒ CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM ❒ CallPilot 2.02 Server Software CD-ROM ❒ CallPilot 2.02 PEP CD-ROM ❒ one or more of the CallPilot 2.02 Language CD-ROMs (3) ❒ CallPilot 2.02 Desktop Messaging Client Software and Updates CD-ROM ❒ CallPilot 2.02 Documentation CD-ROM
Printed documents	❒ the readme.txt file from the CallPilot 2.02 OS Recovery CD-ROM or the CallPilot 2.02 OS Upgrade CD-ROM **Note:** This *CallPilot Upgrade Guide* contains all of the information you need to complete the upgrade. However, the readme.txt file may contain last minute information. Refer to the readme.txt file only if you need more guidance during the upgrade. ❒ this guide ❒ the latest *CallPilot 2.02 General Release Bulletin* ❒ CallPilot 2.02 *Installation and Configuration* binder for the server model ❒ CallPilot 1.07 *Documentation Addendum* ❒ CallPilot 1.07 *Installation and Configuration* binder for the server model ❒ *Product Bulletin 2003-0151-Global: CallPilot Support for AntiVirus Applications*

Items	Description
Information (in written form)	❒ CallPilot 2.02 keycode label ❒ a CallPilot mailbox, a phoneset, and the Voice Messaging phone number to ensure that CallPilot is operational after the upgrade ❒ if you have the fax or speech recognition options, a fax machine and the phone numbers for Express Fax Messaging, Speech Activated Messaging, or both ❒ the current password for the Administrator, NGenSys, or NGenDist account If you are unfamiliar with these passwords, contact the network administrator. ❒ the customer's network settings (CLAN and ELAN IP addresses, subnet masks, and default router/gateway address) ❒ the customer's Remote Access Service (RAS) IP address pool settings
Hardware	❒ *200i or 201i server only:* ■ External CD-ROM drive (NTRH9037/A0683739) or CD-ROM kit (NTUB59AA/A0744832) ■ External Tape drive (NTRH9038/A0683740) or Tape drive kit (NTUB53AA/A0739901) ❒ *200i server only:* MAS PCMCIA Flash Recovery card (NTRH9055/A0744464)

6. Connect peripheral devices to an IPE server.

ATTENTION

Do not use a CD-ROM drive that is combined with a tape drive in a single case.

Wait until the full system backup is completed (if one is in progress) before you perform this procedure.

1 If the CallPilot server is a 200i or 201i server, connect the monitor, keyboard, mouse, and external CD-ROM drive to the server.

Ensure that termination is in the ON position on the CD-ROM drive, and that no other SCSI peripheral devices are connected to the SCSI chain.

For instructions, refer to Part 2 in the *CallPilot 1.07 Installation and Configuration* binder.

2 Restart the server and wait for it to come back into service.

3 Test the CD-ROM drive.

7. Verify that CallPilot 1.07 does not have any active alarms.

Use the CallPilot 1.07 Event Browser and Alarm Monitor to verify that there are no active alarms. This includes looking for alarm 40241 against volume 1, which indicates that MMFS volume 1 is more than 90 percent full.

If any alarms are active, clear them. If MMFS volume 1 is more than 90 percent full, *do not* proceed with the CallPilot server upgrade. An upgrade to the latest release of the voice prompts may fail.

If alarms reoccur within a few hours of normal system usage, they are real problems and must be resolved before you begin the upgrade.

ATTENTION

Do not assume that an upgrade to CallPilot 2.02 will cure an unhealthy CallPilot system. If the CallPilot system is experiencing problems before you start the upgrade, those problems may cause the upgrade to fail. An upgrade failure can cause the system to be damaged beyond repair, and require you to reinstall the operating system, CallPilot software, or both.

Ensure that system problems are resolved before you begin the upgrade.

Note: If there are minor or major alarms that are understood and do not have any impact to the system, it may be acceptable to proceed with the upgrade. Evaluate the alarms carefully before proceeding. When in doubt, contact your Nortel Networks technical support representative.

For more information about reviewing alarms, refer to “Using the Alarm Monitor” in the *CallPilot 1.07 Monitoring and Security for the Administrator Guide* (NTP 555-7101-500).

8. Ensure that the required PEPs are installed.

ATTENTION

The CallPilot 1.07 server must be running SU3 or later. SU4 is preferred.

A. Determine which CallPilot PEPs are installed.

1 On the CallPilot server, click Start → Programs → CallPilot → System Utilities → PEP Maintenance Utility.

Result: The DMI Viewer appears.

2 In the left pane, click CallPilot Server, and then click Show PEPs to display the list of PEPs that begin with NM.

3 Click Show Suites, and then in the left pane, click MAS Base.

4 Click Show PEPs to display the list of PEPs that begin with NB.

B. Determine which PEPs are required.

Review the *CallPilot 2.02 General Release Bulletin* to determine which PEPs are required on the switch and on CallPilot.

C. Acquire the PEPs from Nortel Networks.

1 Access the Nortel Networks Meridian PEP Library (MPL) at one of the following URLs:

- North America: http://www43.nortelnetworks.com/MPL
- Europe, Middle East, and Africa: http://www21.nortelnetworks.com/MPL

Note: The Meridian PEP Library is a secure web site and requires a user name and a password to log on. If you do not currently have an account, you must apply for one at http://www.nortelnetworks.com, or through your Nortel Networks Channel Partner Account Manager. It can take up to 72 hours to process your account request.

2 Locate the type of PEPs you need as follows:

For	Navigate to the
Meridian 1 or Succession 1000 PEPs	“Meridian 1/Succession 1000 PEP Tools” section.
X11 PEPs for PBXs that are connected to CallPilot	“PEP Dependency Tools” section.
CallPilot service updates	“Multimedia PEP Tools” section.

D. Install the PEPs.

1 Install the Meridian 1 switch or Succession 1000 system PEPs before proceeding with the CallPilot server upgrade.

If the required PEPs are not present on the Meridian 1 switch or Succession 1000 system, ring-no-answer and other call processing issues can occur.

2 Apply the CallPilot 1.07 PEPs.

For instructions, refer to Part 5 in the *CallPilot 1.07 Installation and Configuration* binder and the readme file provided in each PEP package.

ATTENTION

If the server is a 200i or 201i server, ensure that the latest SCSI driver is installed. To determine the currently installed SCSI driver version, do the following:

a. In Windows NT Explorer, click View → Options, and then ensure that Show all files is selected.

b. Locate the SCSI driver file:
— 200i: d:\winnt\system32\drivers\symc8xx.sys
— 201i: c:\winnt\system32\drivers\symc8xx.sys

c. Right-click the file name, and then click Properties.

If the file returns version "FLINT-4.16.01 w/no sync," the correct file is installed and no action is required. If the file displays a different version, apply PEP 20xi_SCSIup.EXE. The PEP is available for download from the MPL web site.

9. Perform a full system backup of the system.

1 Log on to the CallPilot server with the administration client and ensure that an up-to-date full system backup is available.

IF a full system backup is	THEN
available	ensure that you have access to the backup tape or backup on a hard drive.
not available	start one. For instructions, refer to the *CallPilot 1.07 Monitoring and Security for the Administrator Guide* (NTP 555-7101-500). The system remains in service during the backup process.

2 Continue with completing other tasks on this "Upgrade Readiness Checklist."

At the same time, monitor the progress of the backup.

3 Ensure that the backup completes successfully, without any errors.

4 If you chose to perform a backup to tape, remove the tape, label it, and put it in a safe location.

10. Reassign the CD-ROM drive to drive Z (if required).

If the CallPilot server's CD-ROM drive is not mapped as drive Z:, you must reassign the drive letter to drive Z (see below).

If any files on the CD-ROM drive are open, close them before you perform the following procedure. If files are open, you receive an error message when you attempt to reassign the drive letter.

1 At the CallPilot server, log on to Windows NT with a user ID that has administrative capabilities.

2 Click Start → Programs → Administrative Tools (Common) → Disk Administrator.

3 Right-click the white square next to CD-ROM 0.

4 Select Assign Drive Letter.

5 Choose drive Z.

Result: The following message appears:

```
This assignment will happen immediately, do you wish to
continue?
```

6 Click Yes.

Result: The new drive assignment occurs immediately.

Continue with “Verify that CallPilot server disk partitioning meets Nortel Networks requirements” below.

11. Verify that CallPilot server disk partitioning meets Nortel Networks requirements.

In Disk Administrator, verify that disk partitioning is defined as shown in the following table:

Server model	Drive C	Drive D	Drives E and F
200i	100–250 Mbytes	3800 Mbytes or more	Not applicable
	The operating system is on drive D.		
201i	1000–1028 Mbytes	4000–4010 Mbytes	Not applicable
	The operating system is on drive C.		
702t or 1001rp: one of the following configurations:			
1	100–250 Mbytes	3800 Mbytes or more	4000 Mbytes or more
	The operating system is on drive D.		
2	600–610 Mbytes	3400 Mbytes or more	4000 Mbytes or more
	The operating system is on drive D.		

Server model	Drive C	Drive D	Drives E and F
3	1000–1028 Mbytes	3400 Mbytes or more	4000 Mbytes or more
	The operating system is on drive C.		

12. Verify that only authorized software and folders are installed.

ATTENTION

If the CallPilot server contains any software or folders that are not authorized by Nortel Networks, you must uninstall the software, remove the folders, or both. Unauthorized folders cause an error message to appear when during the Windows NT update. Unauthorized software can impact CallPilot performance.

ATTENTION

Check for the presence of the C:\windows folder on your CallPilot server. If the C:\windows folder is present, then either rename it or delete it. If you do not rename or remove the C:\windows folder, then the operating system is blocked from performing an upgrade.

1 Click Start → Settings → Control Panel → Add/Remove Programs → Install/Uninstall tab.

2 Review the list that appears.

The list should contain only the following items:

- CallPilot 1.07 Server
- pcANYWHERE32
- If security PEP NM010709G078S is installed:
  — Microsoft Internet Explorer 5.5 and Internet Tools
  — Microsoft Windows Media Player 6.4
- If the server is equipped with RAID, one of the following:
  — Mylex Workstation Array Manager
  — Mylex Global Array Manager
  — Power Console Plus Package
- If a Nortel Networks-approved antivirus software application is installed, one of the following:
  — eTrust InoculateIT (version 4.53 or 6.0)
  — Norton AntiVirus (2001 or corporate version 7.x)
  — McAfee NetShield for Windows NT (version 4.5)

If any other software is installed, you must uninstall it. This includes the following:

- Acrobat Reader

- antivirus software that is not approved by Nortel Networks (refer to the list of approved antivirus software applications above)
- Microsoft Visual C+ or other development tools
- Microsoft Word or Office components
- Microsoft Outlook, Outlook Express, or other e-mail clients
- Nortel CallPilot Player, Admin Client, or Application Builder
- WinZip or other zip utilities
- Microsoft FrontPage
- games
- Windows components that are not required by CallPilot (for example, Solitaire, IIS 4, and so on)
- Timbuktu (remote access application)

3 Do the following:

a. In Windows NT Explorer, display the contents of the following folders:
— c:\windows\program files
— d:\windows program files

If any of the following subfolders appear, delete them:

- Adobe
- directx
- Divx
- FrontPage Express
- Logitech
- Microsoft FrontPage
- Microsoft Office
- Microsoft Visual Studio
- Microsoft Visual Studio .NET
- Net2Phone
- NetMeeting
- Netopia
- Netscape
- Nortel Networks
- Outlook Express
- PowerQuest
- Qualcomm
- Quicktime
- Rational
- Real
- Symantec\pcAnywhere
- Winamp
- WinZip

b. If the c:\windows folder is present, either rename it or delete it.

Note: If these folders exist, the following error message appears during the Windows NT update (see page 43):

```
One or more unauthorized software packages has been
installed on the CallPilot server. This may cause problems
for the CallPilot upgrade. Please remove all unauthorized
software. Terminating upgrade
```

13. Run the precheck.exe utility.

The precheck.exe utility on the CallPilot 2.02 OS Recovery CD-ROM or the CallPilot 2.02 OS Upgrade CD-ROM checks for the presence of certain files that are generated by server crashes. The utility also checks various software components on the CallPilot server to ensure that they are the correct version.

1 Insert the CallPilot 2.02 OS Recovery CD-ROM or the CallPilot 2.02 OS Upgrade CD-ROM into the CD-ROM drive.

2 Click Start → Run.

Result: The Run dialog box appears.

3 Type **z:\precheck.exe**, and then click OK.

Note: The alternate method to run the file is as follows:

a. Click Browse.

b. Navigate to the CD-ROM drive (Z:\).

c. Double-click the precheck.exe file that is located in the root folder.

Note: If file name extensions are not visible, click View → Details to make them visible.

d. Click OK.

Result: The precheck.exe utility runs.

4 If the precheck.exe utility reports any errors, continue with “Resolve errors that were reported by the precheck.exe utility (if required)” on page 30.

Note: The dialog box that reports the error identifies where the precheck.log file is located on the server.

What the precheck.exe utility checks

The precheck.exe utility on the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM automatically checks for the following items (you do not need to manually check them yourself):

- determines if the drwtsn32.log exists

  If there were recent server crashes, the system may be having problems that should be investigated and resolved prior to attempting the upgrade.

- determines if the user.dmp file exists

  If there was a recent server crash, the system may be having problems that should be investigated and resolved prior to attempting the upgrade.

- determines if the System Volume Information folder exists in the root of each lettered drive

  If this folder exists on any of the drives, the Windows NT Check Disk utility will fail (see page 37), and you must reinstall Windows NT and CallPilot. Windows 2000 or related tools have been used on one of the NTFS partitions. Windows NT 4.0 may not handle them correctly.

- ensures that no screen savers are enabled

Screen savers can create problems with the upgrade process.

- verifies that the c:\201tmp folder exists on the 201i server
- verifies that pcAnywhere is installed
- verifies that the c:\tandberg\trscsi.sys file exists on the 200i server
- ensures that the server has the correct amount of RAM (no more, no less), as follows:
  - 200i: 128 Mbytes (may show as 127)
  - 201i: 256 Mbytes (may show as 255 or 254)
  - 702t: 256 Mbytes
  - 1001rp: 256 Mbytes
- verifies that Internet Explorer was not upgraded to a non-supported version

  Note: If security PEP 078S was applied, Internet Explorer is version 5.5; otherwise, Internet Explorer is version 2.
- ensures that the server has the correct pagefile size, as follows:
  - 200i: 140 Mbytes on drive D
  - 201i: 268 Mbytes on drive C
  - 702t and 1001rp: 268 Mbytes on the system drive (C or D)
- verifies that pcAnywhere was not upgraded

  The version must be 8 (pcANYWHERE32). pcAnywhere can be installed on either drive C or drive D.
- ensures that SP6a is not installed (unless it was installed as part of security PEP 078S)
- verifies that the video driver is one of the following:
  - 200i: Cirrus compatible display adapter
  - 201i: VGA compatible display adapter
  - 702t: Cirrus VGA compatible display adapter
  - 1001rp: one of the following:

    — VGA compatible display adapter

    — Diamond Stealth III S520/S540
- verifies that the firmware for the AcceleRAID352 RAID controller card on the 1001rp server is version 6.xx.yy

14. Resolve errors that were reported by the precheck.exe utility (if required).

1. Launch Notepad.
2. Open the precheck.log file, and then carefully review it for any problems that were reported.

   Click File → Open, and then navigate to the root folder on the drive on which the operating system is installed (this is the drive than contains the Windows NT [winnt] folder).

3 Resolve the problems.

Notes:

- If the precheck.exe utility reports that the video driver is not the version required by CallPilot, see “Install the correct video driver (if required)” on page 31.
- If the precheck.exe utility reports that the AcceleRAID352 RAID controller card firmware version is not 6.xx.yy, see “1001rp server only: “Update the firmware on the AcceleRAID352 RAID card (if required)” on page 32.
- Even though the utility reports that one or more checks failed, the log file may indicate that no problems actually exist. In this case, you can proceed with the upgrade after you have completed the tasks in this Upgrade Readiness Checklist.

4 Optional: After you resolve the errors, run the pre-check.exe utility again to ensure that the errors were resolved correctly.

15. Install the correct video driver (if required).

If the precheck.log file indicates that the installed video driver is not the version required by CallPilot, you must install the correct version. This requires that you also uninstall and then reinstall pcAnywhere 8.

ATTENTION

Before you change the video driver on the 1001rp server, ensure that the installed video card is the correct type. For more information, see “Determine if hardware changes are required” on page 17.

1 Uninstall pcAnywhere 8, as follows:

a. Click Start → Settings → Control Panel → Add/Remove Programs → Install/Uninstall tab.

b. Choose pcANYWHERE32, and then click Remove.

2 Install the correct video driver.

The video driver required by the server is provided on the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM.

For instructions on installing the driver, refer to the following:

- *CallPilot 1.07 Documentation Addendum*
- “Installing video card device drivers” in Part 5 of the *CallPilot 1.07 Installation and Configuration* binder

3 Reinstall pcAnywhere 8.

For instructions, refer to the following:

- *CallPilot 1.07 Documentation Addendum*
- “Installing pcANYWHERE32” in Part 5 of the *CallPilot 1.07 Installation and Configuration* binder

16. 1001rp server only: Update the firmware on the AcceleRAID352 RAID card (if required).

If the precheck.log file indicates that the AcceleRAID352 RAID controller card on the 1001rp server is using firmware version 7.xx.yy, you must change the RAID card's firmware to version 6.xx.yy. If the version is 7.xx.yy, a problem may occur during the CallPilot upgrade.

ATTENTION

Ensure that you know the IP address information for CLAN and ELAN. The firmware change modifies the PCI bus numbering, which causes the network card drivers to not load properly. You must remove the network adapters in the Network applet, and then re-add them.

1 Insert the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM into the CD-ROM drive.

2 Copy the following files from the Z:\Drivers\Misc\RAID\AR352\Firmware folder to the root folder of a non-bootable, blank, formatted floppy disk:

- FLP60013.000
- BLP60100.026
- EZ20319.IMG
- KLP60003.000

3 Restart the 1001rp server.

4 When prompted, press Alt+R to launch the EZASSIST utility.

Result: The Mylex EZAssist utility launches.

5 Press Enter to choose the RAID controller card.

6 Use the up and down arrow keys to choose Advanced Options, and then press Enter.

7 Press Enter to choose Update Flash Code.

8 Type the first filename (see the following list), and then press Enter.

- FLP60013.000
- BLP60100.026
- EZ20319.IMG
- KLP60003.000

9 Choose the controller.

Note: Look for the check mark to the left of the controller.

10 Press Tab to choose OK, and then press Enter.

Result: The following prompt appears:

```
Are you sure?
```

11 Press Tab to choose OK, and then press Enter.

12 Wait while the flash memory is updated.

13 When it is done, choose OK, press Enter, and then press Esc.

14 Repeat steps 8 to 13 for each of the above-listed files.

Note: Press backspace to clear the previous file name.

15 When all of the files have been flashed, press Esc to exit the EZASSIST utility.

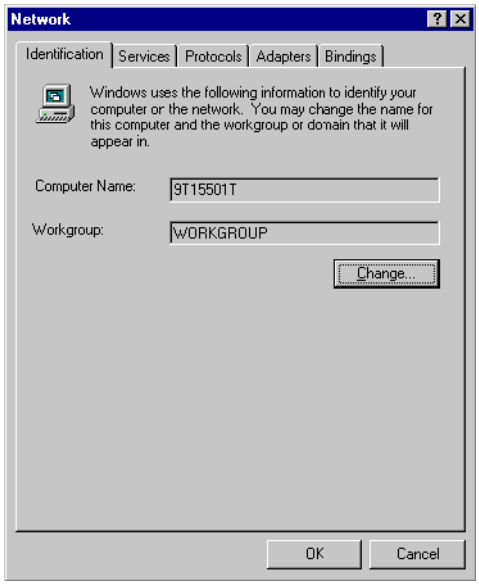
16 Remove the floppy disk.

17 Restart the server, and then log on to Windows NT.

18 Click Start → Settings → Control Panel.

19 Double-click the Network icon.

Result: The Network dialog box appears.



20 Click the Adapters tab.

21 Choose the adapters, and then click Remove.

Result: The following prompt appears:

```
Would you also like to remove the files associated with
this adapter?
```

22 Click No.

23 Close the Network applet.

Result: The system prompts you to restart the server.

24 Click Yes.

Result: The server restarts.

25 Log on to Windows NT.

26 Click Start → Settings → Control Panel.

27 Double-click the Network icon.

Result: The Network dialog box appears.

28 Click the Adapters tab.

29 Click Add.

30 Click Have Disk, and, when prompted for the path, type **c:\drivers\network\intel.**

Result: Both adapters are added.

31 Configure both adapters, as required, for the ELAN and CLAN.

This includes configuring the IP address for each adapter.

32 Close the Network applet, and then restart the server.

17. Launch Windows NT Explorer, and then complete the following tasks:

A. Verify the availability of free disk space on the server.

ATTENTION

Perform this procedure for each drive letter on the server.

Minimum disk space requirements for the Windows NT update and CallPilot 2.02 upgrade vary based on server model and whether PEP 78S has been applied.

The Windows NT update program deletes any files on the server that are not needed, and then verifies that sufficient free disk space is available before allowing the update to proceed. The CallPilot 2.02 software upgrade program only verifies that sufficient free disk space is available before allowing the upgrade to proceed. Therefore, if you think that the server does not have enough free disk space, the upgrade may still succeed.

To ensure that the upgrade can continue (and thereby prevent unnecessary delays), you should perform a visual check as described on the following page *before* you begin the upgrade.

Drive letter	Estimated free disk space requirement
C	■ When the operating system is on drive D, 20 Mbytes or more of free space is required. ■ When the operating system is on drive C, 80–135 Mbytes or more of free space is required.
D	150 Mbytes of free space or more is required.

1 In Windows NT Explorer, right-click the drive letter, and then click Properties.

Result: A dialog box that shows the total drive size, the amount of space used, and the amount of free space appears.

2 Review the free space value.

IF free space is	THEN
less than the ranges identified in the preceding table	do the following: **a.** Close the disk drive properties dialog box. **b.** Continue with “Remove unnecessary files from the server” on page 35.
equal to or greater than the ranges identified in the preceding table	continue with “Run the Windows NT Check Disk utility” on page 37. **Note:** Do not close the disk drive properties dialog box yet.

CAUTION

Risk of incorrect system operation

Do not delete the following files:

- pagefile.sys
- bluedat1.db
- any file that begins with VS

B. Remove unnecessary files from the server.

ATTENTION

Perform this procedure *only* if you need to free up disk space.

If the server meets the available free disk space requirement for the upgrade (see the “Estimated free disk space requirement” table on page 34), then go to “Run the Windows NT Check Disk utility” on page 37.

Note: Nortel Networks recommends that you remove only enough files to provide the free space you need for the upgrade.

1 Remove all files and folders in the c:\temp and d:\temp folders.

If an error occurs while attempting to remove a particular file, ignore the error, but try to remove as many files and folders as possible in the temp folder. It is possible that the file is being used by Windows NT.

Note: Do not remove the c:\temp and d:\temp folders.

2 Determine if there are any files in the d:\nortel\mpcx\migration folder.

If this folder contains files, delete them. They are leftovers from a previous Meridian Mail to CallPilot migration.

3 Remove other unnecessary files (especially large files) from the system (see below for guidance).

CAUTION

Risk of incorrect system operation

Do not delete the following files:

- pagefile.sys
- bluedat1.db
- any file that begins with VS

To locate large files that can safely be removed, do the following:

a. In Windows NT Explorer, click Tools → Find → Files or Folders.

Result: The Find dialog box appears.

b. Type *.* in the Named box.

c. Choose a drive letter in the “Look in” box.

d. Click Find Now.

Result: All files on the drive are listed.

e. Click the Size header to sort the list by file size.

f. Review the list of the largest files, and delete files that contain any of the following in their file name extensions:

— .bkp

— .log (except setup.log)

— .dmp

— .zip (except Java Packages)

— .pdb

— _*.aa* (such as _2t.aab, _2t.aac, and so on) in the \winnt\system32 folder

Note: The _*.aa* files are created each time the CallPilot server restarts. You may not be able to delete a file because it is being held open by Windows NT. Delete as many files as you can. The Windows NT upgrade process automatically removes these files.

You can also safely remove the following:

— files in the c:\sysops\patch folder (these files contain backup information for installed CallPilot 1.07 PEPs)

— files used in a past technical support activity

4 If necessary, you can compress the following types of files on drive D:\ to free up more space:

- *.pdf files
- *.hlp files

CAUTION

Risk of incorrect system operation

Do not compress the following files:

- pagefile.sys
- bluedat1.db
- any file that begins with VS

To compress a file, do the following:

a. Right-click the file name, and then choose Properties.

b. Check the Compressed box.

c. Click Apply.

5 Empty the Recycle Bin.

6 If disk space is still low, determine if a Nortel Networks-approved antivirus software application is installed on the drive that needs more space.

If it is installed, uninstall it, and then reinstall it on a different drive.

7 Continue with “Run the Windows NT Check Disk utility” below.

C. Run the Windows NT Check Disk utility.

ATTENTION

Perform this procedure for each drive letter on the server.

1 In the dialog box that reports the disk drive space statistics, click the Tools tab.

Note: If the disk drive properties dialog box is not open, in Windows NT Explorer, right-click the drive letter, and then click Properties.

2 Click Check Now.

3 Ensure that both of the following options are *not* checked:

- Automatically fix file system errors
- Scan for and attempt recovery of bad sectors

4 Click Start to perform the check.

5 Ensure that the check runs successfully and does not find any problems.

6 Close the Properties dialog box for the drive letter.

7 Does the server have more drive letters that must be checked?

IF	THEN
yes	do the following: **a.** On the next drive letter, repeat the free disk space check as described in “Verify the availability of free disk space on the server” on page 34. **b.** Repeat the task to remove unnecessary files as described in “Remove unnecessary files from the server” on page 35 (if required). **c.** Repeat this (Windows NT check disk) procedure on that drive letter.
no	close the drive’s Properties dialog box and Windows NT Explorer.

18. Remove the NetBEUI protocol (if it is present).

1 Click Start → Settings → Control Panel.

2 Double-click the Network icon.

3 Click the Protocols tab.

4 Choose NetBEUI, and then click Remove.

5 Close the Network applet.

Result: The system prompts you to restart the server.

6 Click Yes to restart the server.

19. Run the nbdbsync107.exe utility.

You must run the nbdbsync107.exe utility to update and synchronize all registry settings. The utility is provided in the root folder on the CallPilot 2.02 Server Software CD-ROM.

1 Insert the CallPilot 2.02 Server Software CD-ROM into the CD-ROM drive.

2 Open an MS-DOS command prompt window.

3 Navigate to the CD-ROM drive.

4 Type **copy z:\nbdbsync107.exe d:\temp*.***, and then press Enter.

Note: If you attempt to run the utility from the CD-ROM drive, you receive an error message. You must copy the utility to the d:\temp folder on the CallPilot server before you execute it.

5 Type **d:**, and then press Enter.

6 Execute the utility by typing **d:\temp\nbdbsync107.exe**, and then press Enter.

Result: The following prompt appears:

```
Do you really want to run this?
```

7 Press Y followed by Enter.

8 When the utility is done, press any key to exit the utility.

9 Type **exit**, and then press Enter to close the MS-DOS command prompt window.

10 Manually restart the server as follows:

   a. Press Ctrl+Alt+Delete.

   Result: The Windows NT Security dialog box appears.

   b. Click Shut Down.

   Result: The Shutdown Computer dialog box appears.

   c. Choose Shutdown and Restart.

   d. Click OK.

   Result: The server shuts down and then restarts.

11 When the logon prompt appears, log on to Windows NT using an account with administrative privileges (for example, NGenDist).

20. Verify the Administrator account privileges.

1 Click Start → Programs → Administrative Tools → User Manager for Domains.

2 Ensure that the Administrator account exists (the name must be Administrator).

   Note: If the administrator account name was changed, click User → Rename, and then change it to Administrator.

3 Ensure that the Administrator account is a member of the Administrators group as follows:

   a. Double-click the Administrator account.

   b. Click Groups.

   Result: The groups in which the Administrator account is a member appear. Ensure that the Administrators group is listed.

   c. Click OK twice.

4 Ensure that the Permit Blank Password option is enabled, as follows:

   a. Click Policies → Account.

   b. Ensure that the Permit Blank Password option is enabled.

   c. Click OK.

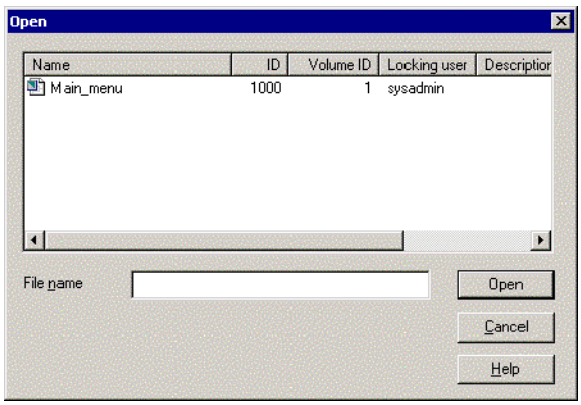
5 Click User → Exit → Close User Manager.

21. Ensure that no Application Builder applications are locked.

1. On the administrative PC, launch Application Builder.
2. Click File → Open.

   Result: The Open dialog box appears.
3. Ensure that the Locking user column is empty.

   The following is an example of an application that is open and locked by another user. If you need assistance with unlocking the application, contact your Nortel Networks technical support representative.



22. Remove any custom events that are defined on the CallPilot server.

You must delete any custom events that are defined before the CallPilot system is upgraded. After the upgrade is completed and confirmed as successful, you can recreate these custom events.

To delete custom events, do the following:

1. On the administrative PC, launch the Admin client, and then connect to the CallPilot server.
2. Click System Administration → Alarms & Events → Event Preferences.
3. Record the custom event codes that are listed.

   Note: Either record them on paper, or perform a screen capture.
4. Delete each event code.
5. Exit the Admin client.

23. Split the RAID drives (if required).

If the CallPilot server is equipped with a RAID controller, you must split the drives in the RAID system pack just before you begin the upgrade. This procedure breaks the mirroring of the hard drives so that if the upgrade fails, you can quickly return the server to the state it was in before you started the upgrade.

For instructions on how to split the RAID drives, refer to the section entitled "Splitting RAID drives and upgrading software" for your RAID controller in Part 5 of the *CallPilot 2.02 Installation and Configuration* binder.

24. Ensure that CallPilot 1.07 is fully functioning and able to take calls.

1 Ensure that a system backup is not in progress.

2 Verify that no new alarms occurred.

If new alarms occurred since you last checked them, resolve them.

3 Verify that the system-ready indicator states that CallPilot services have started and that CallPilot is ready to accept calls.

For more information, refer to Part 3 of the *CallPilot 1.07 Installation and Configuration* binder.

4 Test the CallPilot system as follows:

a. Make several test calls, and confirm that CallPilot answers.

b. Leave and retrieve messages.

c. Verify that the MWI indicator on the phoneset is updated.

d. Verify that the ELAN and CLAN configuration are correct and that no IP address conflicts exist for either the ELAN or the CLAN.

ATTENTION

After you verify that the system is operational, ensure that you do not disconnect it from the LAN or switch before you begin the upgrade to CallPilot 2.02. If the server is disconnected (and then reconnected), you must verify system operation again.

25. Courtesy stop all channels.

Courtesy stop all DSP and DS0 channels.

If you do not courtesy stop the channels, any calls that are active are suddenly terminated during the upgrade. For instructions, refer to “Managing channels” in the *CallPilot 1.07 Monitoring and Security for the Administrator Guide* (NTP 555-7101-500).

Note: After the upgrade to CallPilot 2.02, you must manually start the channels using CallPilot Manager. If you do not manually start the channels, CallPilot will not start completely.

26. Verify that the server BIOS is configured to start the server from the hard drive.

The CallPilot 2.02 OS Recovery and CallPilot 2.02 OS Upgrade CD-ROMs are bootable CD-ROMs. You must ensure that the CallPilot tower or rackmount server’s BIOS is configured to start the server from the hard drive instead of from the CD-ROM drive. This will prevent the MS-DOS 6.2 Startup Menu on the OS Recovery or OS Upgrade CD-ROM from appearing after each server restart during the Windows NT operating system update.

1 Restart the server.

2 At the appropriate moment, enter the BIOS setup.

For more information, see “Changing the BIOS boot device priority” in Part 4 of the CallPilot 2.02 *Installation and Configuration* binder.

3 Change the boot priority list to the following order:

- floppy drive (Removable Devices)
- hard drive
- CD-ROM drive
- any other devices

4 Save the new BIOS settings, and then restart the server.

What’s next?

When all tasks in the Upgrade Readiness Checklist are completed, the CallPilot server is ready for the Windows NT update and CallPilot 2.02 upgrade. Continue with “Phase 2: Updating the Windows NT operating system” on page 43.

Note: The rest of the procedures in this chapter take approximately 90 minutes to complete.

Phase 2: Updating the Windows NT operating system

Introduction

ATTENTION

Read this section before you begin.

Follow the instructions in this section carefully. Do not simply follow the prompts on the screen, since they can be misleading.

Do not remove the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM until the Windows NT update is finished.

Note: You should also print and read the readme.txt file that is provided on the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM. The readme.txt file contains the same information as in this section. However, it may also contain last-minute information that is not provided in this section.

Estimated time required for the update

During the Windows NT update, the system is restarted multiple times. The time required for each restart cycle is based on the system speed of your server model, as well as the operations that are being performed during the start cycle. Start cycles can range from 2 minutes to 10 minutes each.

You should allocate at least 1 hour for completing the Windows NT update.

Windows NT update overview

The Windows NT update process involves running various third-party installers. These installers display dialog boxes that are automatically answered by Button Pusher scripts. *It is very important that you do not manually respond to any of these dialog boxes* since this can interfere with the running of the automatic Button Pusher scripts. For example, if the system asks you if you want to reboot, do not respond unless this guide specifically tells you to respond.

Allow up to 5 minutes before concluding that the installation or upgrade process is not proceeding automatically.

Certain dialog boxes do require you to respond. You can recognize them by the presence of the word “CallPilot” somewhere in the window.

If, after a restart, you see the following error

```
Z:\OSSetup.exe is not a valid Windows NT application
```

or

```
Problem with Shortcut: The drive that the shortcut
“OSSetup.lnk” refers to is unavailable. Make sure that the
disk is properly inserted and then try again.
```

it means that the CD-ROM drive is slow to spin up and is not yet ready. Do one of the following:

- Click OK, and then click Start → Programs → Startup → OSSetup.

or

- Restart the server, and then log on as administrator (null password). The upgrade process should continue.

Button Pusher description

The Windows NT update process uses a tool called Button Pusher (butpress.exe) to automatically operate third-party installation programs. This tool runs from a script that tells the system to wait for particular windows, and then to send certain responses to those windows.

If a window cannot be found, the Button Pusher eventually times out and displays an error. The error window identifies what the Button Pusher was looking for and offers two choices—Retry or Cancel.

- Retry instructs the system to look again for the window, and continues with the script if the window is found.
- Cancel quits running the Button Pusher script. Usually, this causes the Windows NT update process to continue with the next component installation.

Handling Button Pusher errors

During the installation of an OS component, the Windows NT update process may occasionally display different windows than expected (for example, due to an error condition), or a window may take longer than expected to appear. This may result in a Button Pusher time-out. Unfortunately, the Button Pusher error window may not be immediately visible if it is hidden behind a full-screen or always-on-top setup window.

It is normal for the Windows NT update process to seem to stall for up to 5 minutes. It appears as if nothing is happening, but the process eventually continues with no intervention. If nothing at all happens for more than 5 minutes, it is possible that a Button Pusher error occurred.

IF	THEN
the taskbar is visible	determine if a Button Pusher window icon is present. If it is present, click the icon to display the window.
the taskbar is not visible	try pressing Alt+Tab to step through the windows to determine if a Button Pusher error window exists.

IF	THEN
a Button Pusher time-out occurs	it may be possible to recover and continue the Windows NT update process. Carefully read the text in the Button Pusher error window. This window identifies what the Button Pusher was looking for. It is possible that the window became visible later than expected. In this case, click Retry. The Windows NT update should continue correctly.
an unexpected error or warning dialog box appears	it is possible that the window that the Button Pusher was expecting has not appeared yet. In this case, you may be able to manually click to acknowledge the warning and continue the setup. When the window that the Button Pusher was looking for appears, click Retry to continue the Windows NT update process.

ATTENTION

If you click Cancel on the Button Pusher error window, this usually causes the next component installation to begin. Do not click Cancel unless you have manually completed installing the component that caused the error.

Components, in general, must be installed in a particular order. If a component installation fails and is skipped, you may be required to uninstall a later component before reinstalling the component that failed. For example, pcAnywhere must be uninstalled before changing a video driver. Also, Service Pack 6a and hot fixes must be reapplied after installing components from the NT Option Pack.

To initiate the Windows NT update

ATTENTION

Do not use Windows NT Explorer to locate and run the setup.bat file. Windows NT Explorer hides windows that appear during the Windows NT update.

1. Ensure that you have completed the Upgrade Readiness Checklist (see page 16).
2. Log on to Windows NT as Administrator, and then wait until CallPilot is completely started into service.

   This includes waiting until all DSP diagnostics are finished.
3. Ensure that no network drives are mapped to the server.

   This eliminates the need to enter a password after each server restart.

4 Close all windows, including Windows NT Explorer, the Control Panel, Notepad, and CallPilot Support Tools.

Note: Do not close the following windows (leave them minimized):

- MAS trace
- acdproxy
- pcAnywhere Waiting

ATTENTION

If antivirus software is present on the CallPilot server, real-time virus scans on files can significantly slow down the upgrade process. Nortel Networks recommends that you temporarily disable virus checking. Reenable it after the upgrade is finished.

5 If antivirus software is installed on the CallPilot server, disable virus checking.

6 Insert the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM into the CD-ROM drive.

7 Click Start → Run.

Result: The Run dialog box opens.

8 Type **z:\setup.bat**, and then click OK.

Note: The alternate method to run the file is as follows:

a. Click Browse.

Result: The Browse dialog box opens.

b. Navigate to the CD-ROM drive (Z:).

c. Double-click the setup.bat file that is located in the root folder.

Note: If file name extensions are not visible, click View → Details to make them visible.

d. Click OK.

Result: The automated Windows NT update process begins. The update is completed in sections that are labeled from A to H. The system automatically restarts and continues between sections. Specific instructions appear on the screen during some sections.

Note: If you receive the following error message, refer to “Verify that only authorized software and folders are installed” on page 27 for instructions on how to recover:

```
One or more unauthorized software packages has been
installed on the CallPilot server. This may cause problems
for the CallPilot upgrade. Please remove all unauthorized
software. Terminating upgrade
```

In **Section A**, the following actions occur:

- Files that are no longer needed are deleted.
- A check for sufficient disk space is performed.
- CallPilot 1.07 services are shut down (CallPilot is taken out of service).
- pcAnywhere 8 is removed.
- Service Pack 6a is automatically installed.
- The server restarts automatically.

In **Section B**, the following actions occur:

- Auto logon to Windows NT is set up.
- If the operating system is installed on drive C:\, chkdsk runs.
- If the CallPilot 1.07 Security PEP (NM10709G078S) is not installed, the system converts drive C:\ to NTFS.
- The system logs you on to Windows NT, and resumes the update.

ATTENTION

Normally, no further interaction is required for about 1 hour. During this time, you can allow the update to progress unattended. Your next action is to change the Windows NT Administrator password (see page 49).

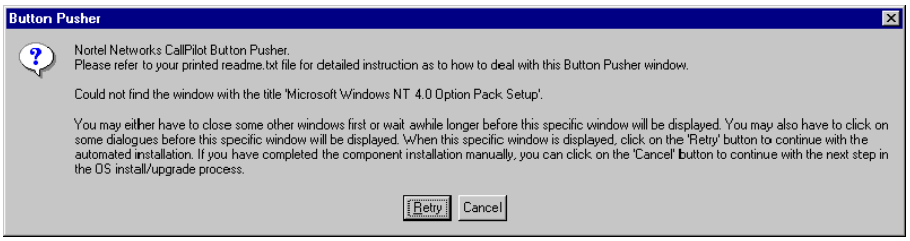
Do not remove the CD-ROM from the CD-ROM drive.

In **Section C**, the following actions occur without your intervention:

- If the CallPilot 1.07 Security PEP (NM10709G078S) is not installed, Internet Explorer 5.5 Service Pack 2 is automatically installed using automatic button pushing.

  Dialog boxes appear and disappear. *Do not* respond to any of them unless you are absolutely certain that an error has occurred.

  Note: An error can be characterized by an unusual wait time longer than 5 minutes with nothing happening, or the appearance of the following error message by the Button Pusher program:



  Since the Button Pusher message may be covered by another window on the screen, look for Button Pusher on the taskbar. If the taskbar is not visible, press Alt+Tab to step through all of the open windows.

- When the install is completed, the server restarts automatically, logs you on to Windows NT, and resumes the update.

In **Section D**, the following actions occur without your intervention:

- Windows NT 4.0 Option Pack installation begins using automatic button pushing. Dialog boxes (including a message pertaining to a Service Pack 4 or later error) appear and disappear. *Do not* respond to any of them unless a button pusher error occurs.

  If a button pusher error occurs before the Option Pack installation is finished, cancel the Option Pack installation, restart the server, and then log on as Administrator using a null password. The Windows NT update process will resume and retry the Option Pack installation.

  Note: The last dialog box for the NT Option Pack (Thank you for choosing Microsoft) may remain visible for up to 5 minutes. This is normal. Eventually, a message appears asking you to click Finish. *Do not* respond. The system clicks Finish for you (this may take up to 5 minutes), and then it restarts automatically, logs you on to Windows NT, and resumes the update.

In **Section E**, the following actions occur without your intervention:

- The following components are automatically installed:
  - Language Pack
  - Adobe Acrobat Reader 5.0
  - MDAC 2.5
  - Service Pack 6a (to update the option pack that was installed in Section D)
- When the last installation is completed, the server restarts automatically, logs you on to Windows NT, and resumes the update.

In **Section F** of the Windows NT update process, the following actions occur:

- Microsoft Security rollup packages are installed.
- When the installations are completed, the server restarts automatically, logs you on to Windows NT, and resumes the update.

In **Section G**, the following actions occur without your intervention:

- Microsoft hot fixes are installed.
- Section G runs several times, restarting the server each time.
- When the hot fix installations are completed, the video driver is updated (if required), and pcAnywhere 10.5 is automatically installed.

  If the server is a 1001rp server and an error occurs while the Diamond Stealth video driver is installed, do not click anything. For instructions on recovering from the error, refer to Section C of the readme file on the CP 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM.
- The server restarts automatically, logs you on to Windows NT, and resumes the update.

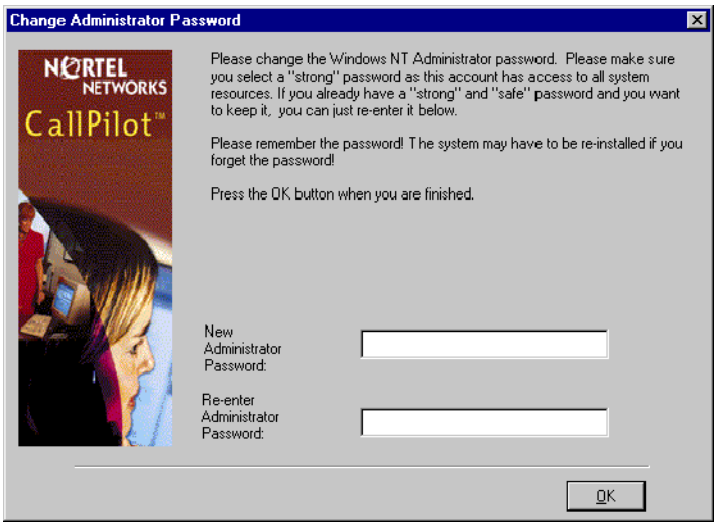
In **Section H**, the following actions occur:

- Additional hot fixes are installed.

  Do not click on anything. All dialog boxes are processed automatically. (The system automatically responds with No to all prompts to restart the server.)

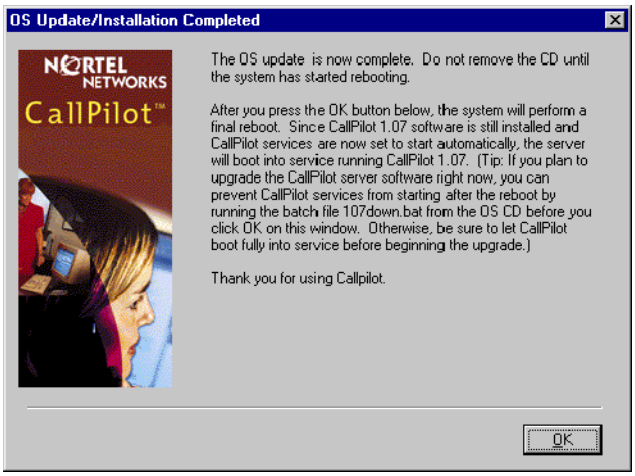
- CallPilot 1.07 services are enabled so that they will start after the next server restart.

- The system prompts you to change the Windows NT Administrator password (from null).



9 Type the Administrator's password into both password boxes, and then click OK.

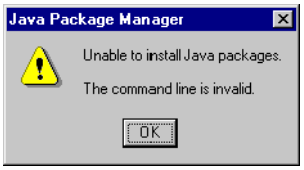
Result: The system runs the Microsoft IISLockDown utility. The utility changes folder permissions to increase server security. When that is finished, the following dialog box appears:



10 Click OK.

Result: The server restarts.

If the following dialog box appears (it may be hidden behind other windows), ignore it and click OK.



11 Remove the OS Recovery CD-ROM or OS Upgrade CD-ROM from the CD-ROM drive.

12 Log on to Windows NT as Administrator.

13 Empty the following folders (do not remove them):

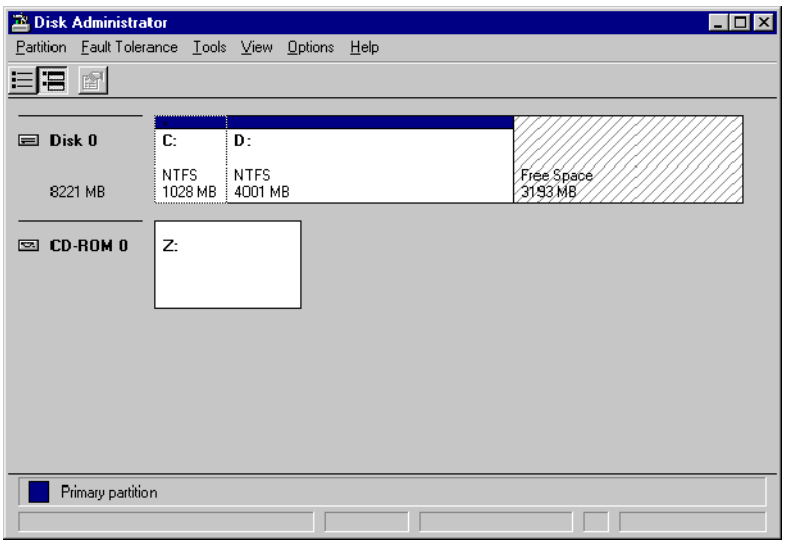
- c:\temp (if this folder exists)
- d:\temp
- Recycle Bin

Note: It is normal for a sharing violation to occur when attempting to delete one or more *.tmp files. Delete all the files and folders you can, but *do not* delete the c:\temp or d:\temp folders.

14 If the CallPilot server is a 201i server, you must expand the D partition if it does not already occupy the remainder of the hard drive. Do the following:

a. Click Start → Programs → Administrative Tools (Common) → Disk Administrator.

Result: The Disk Administrator window appears.

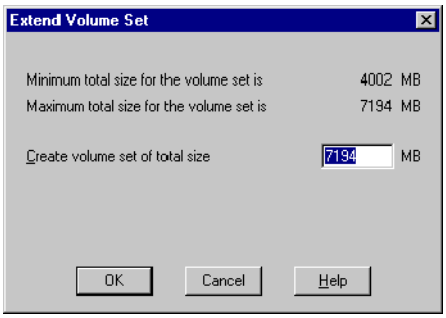


b. Click the D partition.

c. Press Ctrl, and then click the free space after the D partition.

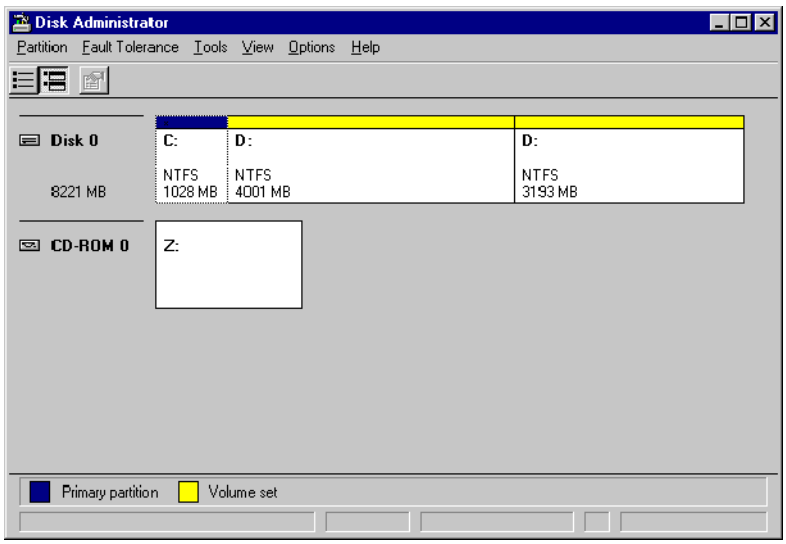
d. Click Partition → Extend Volume Set.

Result: The Extend Volume Set dialog box appears.



e. Click OK to accept the default total volume size.

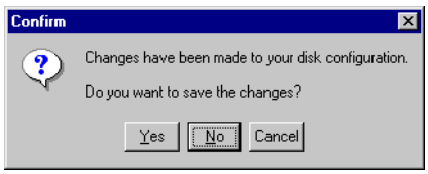
Result: You are returned to the Disk Administrator window. The Disk Administrator screen should appear as follows:



Note: Drive D is shown in yellow to indicate it is a volume set.

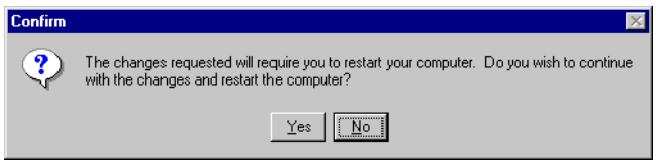
f. Click Partition → Exit to leave Disk Administrator.

Result: The system prompts you to confirm the change.



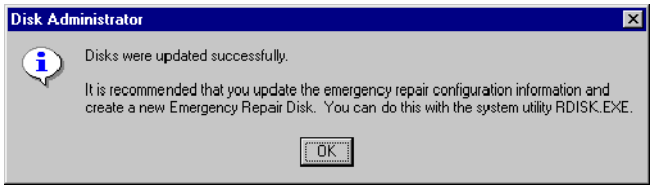
g. Click Yes.

Result: The system prompts you again and asks if you want to restart the server.



h. Click Yes.

Result: The following message appears:



i. Click OK.

Result: The system prompts you to restart the server.

j. Click OK.

Result: The server restarts. During the restart, CHKDSK runs to extend the file system. This takes about 10 minutes.

k. When CHKDSK is finished, log on to Windows NT, and then allow the CallPilot server to start into service.

15 Wait for the required services to start.

IF you	THEN
did not courtesy stop the channels	you must wait for your system to start completely into service.
courtesy stopped the channels	you must verify that the World Wide Web Publishing service has started. If it has not yet started, wait. To verify that the service has started, do the following: **a.** Click Start → Settings → Control Panel. **b.** Double-click the Services applet.

IF you	THEN
courtesy stopped the channels (continued)	**c.** Scroll to the bottom of the services window. **d.** Verify that the World Wide Web Publishing service shows Started and Automatic. **Note:** The Services window does not refresh automatically. To determine if the service has started, close the window, and then reopen the Services applet.

What's next?

Continue with "Phase 3: Upgrading the CallPilot 1.07 software to CallPilot 2.02" on page 54.

Note: If an error message appeared after hot fixes were installed, see "Verifying that Microsoft hot fixes have been installed" on page 132. This section explains how to verify that all of the hot fixes were installed.

Phase 3: Upgrading the CallPilot 1.07 software to CallPilot 2.02

Introduction

Use the procedure in this section to perform an upgrade from CallPilot 1.07.09 to CallPilot 2.02.

Note: At this point, you have updated the server's operating system. The CallPilot 1.07 system is still in a state of complete functionality. If you must run the CallPilot 1.07 system for any reason before performing the upgrade to CallPilot 2.02, you can do so by performing the following steps:

- If you executed the 107down.bat file to stop the services, execute the 107up.bat file from the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM to start the CallPilot 1.07 services.

  Note: The dialog box that reported successful completion of the Windows NT update process (see page 49) suggested that you can run the 107down.bat file to prevent CallPilot 1.07 services from starting.
- If you courtesy stopped the channels, start them.

Estimated time required for the upgrade

It takes about 15 to 20 minutes to upgrade both the CallPilot server software and the CallPilot Manager software.

To perform the upgrade

1. Ensure that no tools are running (for example, PEP Maintenance utility, Support Tools, and so on).
2. Insert the CallPilot 2.02 Server Software CD-ROM into the CD-ROM drive.
3. Click Start → Run.

   Result: The Run dialog box opens.
4. Type **z:\setup.exe**, and then click OK.

   Note: The alternate method to run the file is as follows:

   a. Click Browse.

   Result: The Browse dialog box opens.

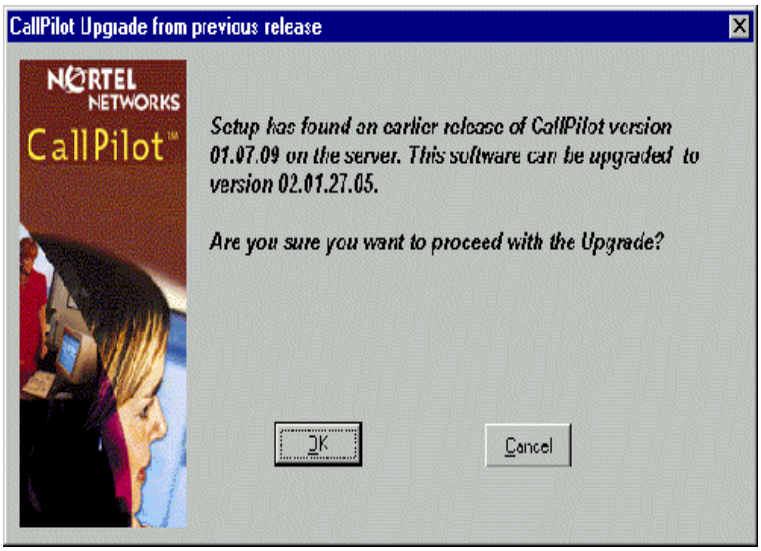
   b. Navigate to the CD-ROM drive (Z:).

   c. Double-click the setup.exe file that is located in the root folder.

   Note: If file name extensions are not visible, click View → Details to make them visible.

   d. Click OK.

Result: The Application Installer checks for a previous release of CallPilot and, if found, displays the following dialog box:



5 Click OK.

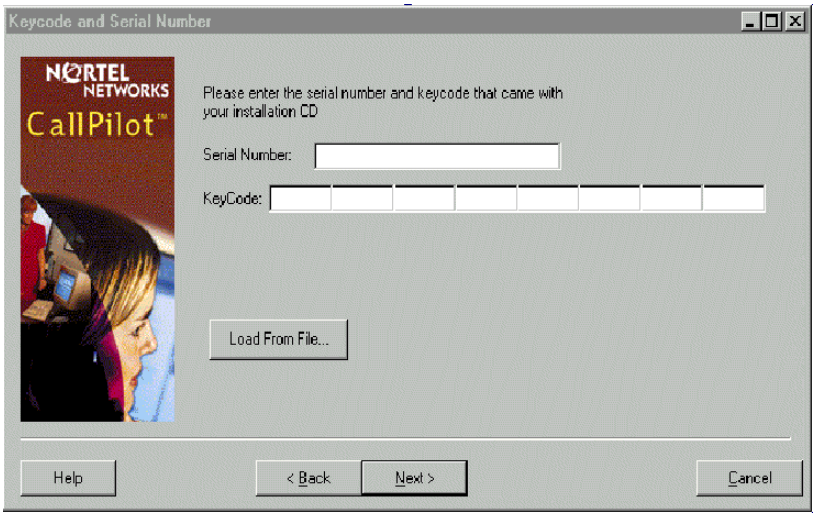
Notes:

- If an error message appears indicating that your computer name and database name are not synchronized, you must exit this setup and perform a synchronization by running the nbdbsync107.exe utility. For instructions, see “Run the nbdbsync107.exe utility” on page 38.

  After you run the nbdbsync107.exe utility, you must restart the server before you proceed with the CallPilot server software upgrade.

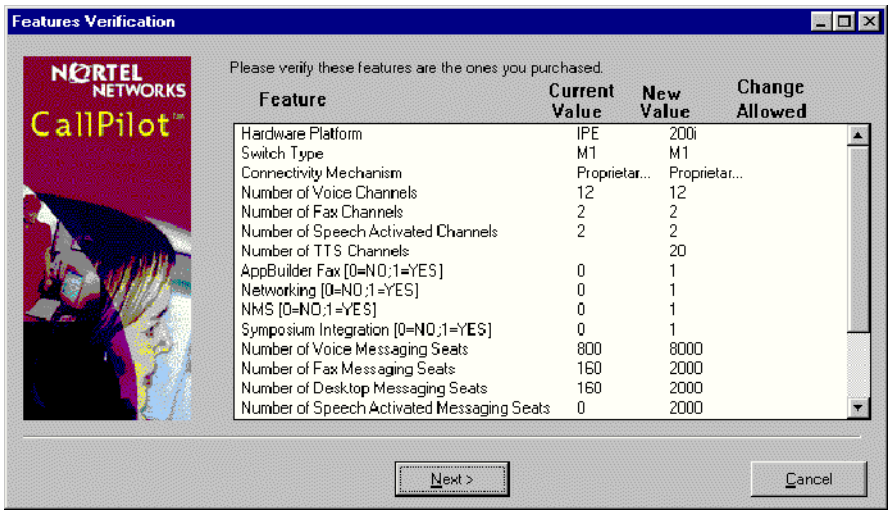
- When the CallPilot upgrade begins, the first phase is the Pre-Check phase. If this phase does not complete and progress to the Copying Files phase within 5 minutes, it is likely that the upgrade was started too quickly before all of the required services were fully started. Use the Windows NT Task Manager to stop the setup.exe application. Then, return to step 3 on page 54 to restart the upgrade.

Result: You are prompted for the keycode, as follows:



6 Type the keycode, and then click Next.

Result: The Features Verification dialog box appears.



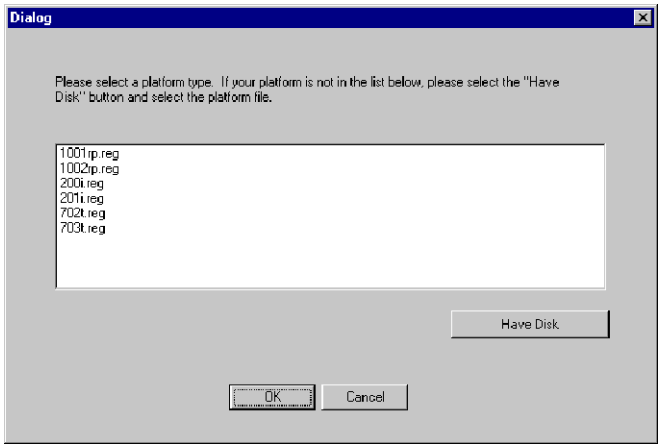
7 Verify that the features are listed as you expect, and then click Next.

Note: If the list does not match your expectations, contact your Nortel Networks representative.

Result: The dialog box closes and the upgrade begins. During the upgrade, the Application Installer does the following:

- displays a progress bar that indicates the percentage that is completed
- highlights each item on the splash screen as it is processed

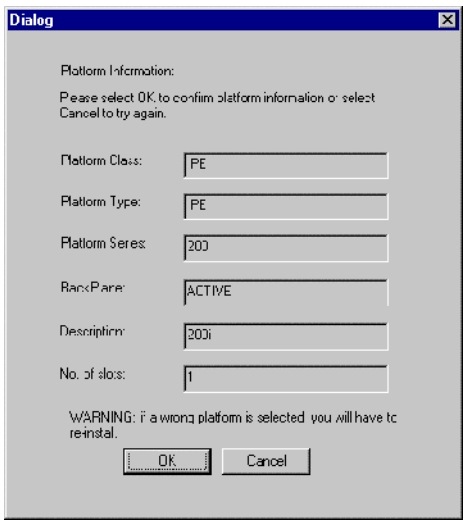
When the “Setting the platform” item begins, the following dialog box appears:



Note: Occasionally, the platform type window becomes minimized on the taskbar. Click the minimized window to make it reappear.

8 Choose the platform type, and then click OK.

Result: A dialog box similar to the following appears to confirm your platform selection:



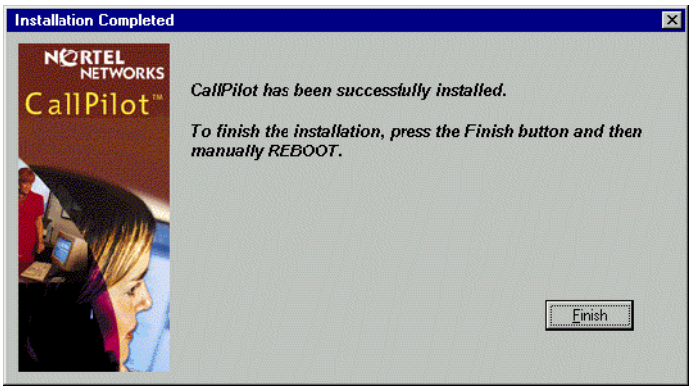
Note: If the CallPilot server is equipped with two MPB16-4 voice processing boards, a dialog box may appear to inform you that the server platform may require hardware changes. For more information, see “Determine if hardware changes are required” on page 17.

9 Verify that you chose the correct platform, and then click OK.

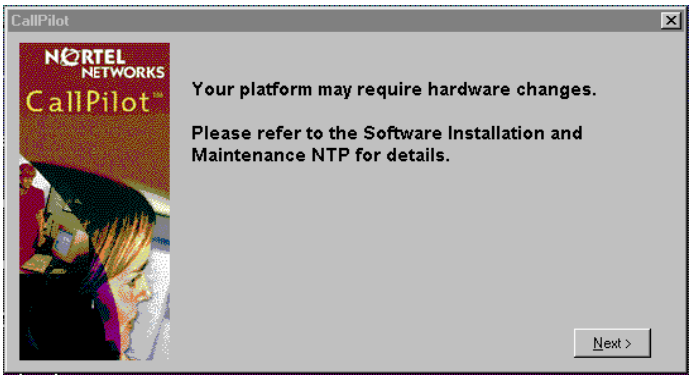
Result: CallPilot updates the Windows NT registry and begins copying files. When finished, the Application Installer automatically installs the CallPilot Manager software.

Note: If the CallPilot Manager software is already present on the server, the Application Installer detects and then upgrades it.

When the CallPilot Manager software installation is finished, the following dialog box appears:



At this point, CallPilot can display the following dialog box:



Since you upgraded and/or verified your CallPilot hardware as indicated in “Determine if hardware changes are required.” on page 17, disregard and close this dialog box.

10 Remove the CallPilot 2.02 Server Software CD-ROM from the CD-ROM drive.

11 Click Finish.

12 Manually restart the server as follows:

a. Press Ctrl+Alt+Delete.

Result: The Windows NT Security dialog box appears.

b. Click Shut Down.

Result: The Shutdown Computer dialog box appears.

c. Choose Shutdown and Restart.

d. Click OK.

Result: The server shuts down and then restarts.

13 When the logon prompt appears, log on to Windows NT using an account with administrative privileges (for example, NGenDist).

What's next

Continue with "Phase 4: Installing Performance Enhancement Packages" on page 60.

Phase 4: Installing Performance Enhancement Packages

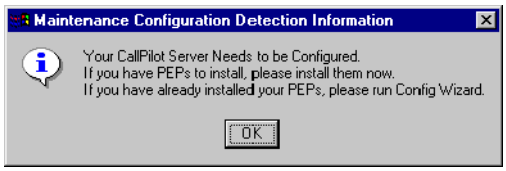
Introduction

Performance Enhancement Packages (PEPs) are software fixes, updates that enhance CallPilot features, or both. PEPs are provided on the CallPilot 2.02 PEP CD-ROM.

PEPs are also provided in service updates after the PEP CD-ROM is released to market. If a service update is available, apply the PEPs from the service update. PEP installation from the PEP CD-ROM is not required.

To install a PEP

The CallPilot system is not yet fully functional. Therefore, the following message may appear:



Click OK, and then continue with the PEP installation, as follows.

1 Insert the CallPilot 2.02 PEP CD-ROM into the CD-ROM drive.

2 Click Start → Run.

Result: The Run dialog box opens.

3 Click Browse.

Result: The Browse dialog box opens.

4 Navigate to the root directory on the CD-ROM drive (Z:).

IF the root directory	THEN
contains a readme.txt file and a runme.exe file	continue with the rest of this procedure.
does not contain a readme.txt file and a runme.exe file	navigate to a PEP directory, and then continue with the rest of this procedure.

5 Open and review any readme files that are present in the directory for specific uninstallation instructions, installation instructions, or both.

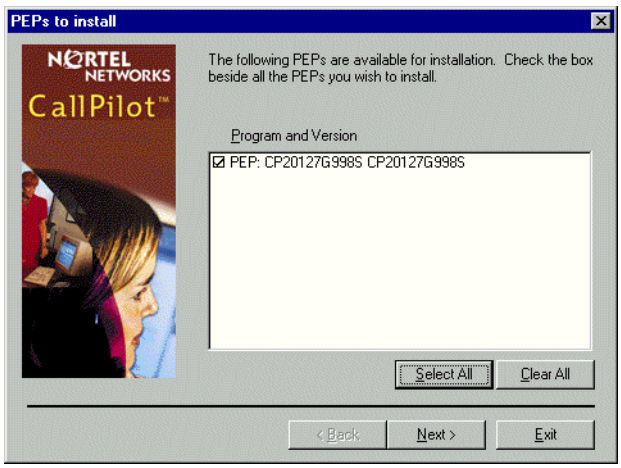
6 Double-click the runme.exe file, and then click OK.

Result: Setup examines the system, and the PEPs to install window appears.

ATTENTION

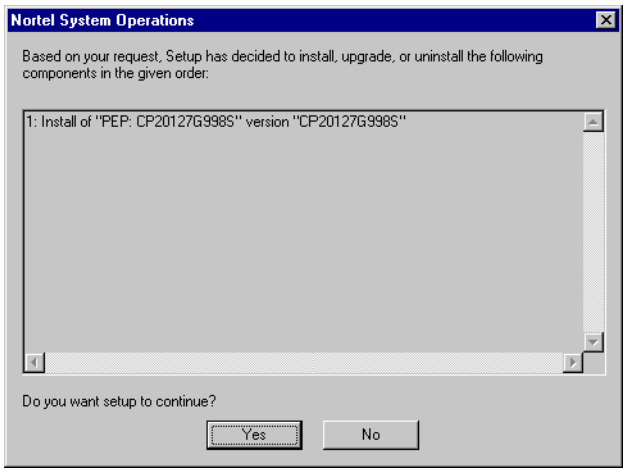
It can take 5 to 20 minutes for the PEPs to install window to appear, depending on the number of PEPs and the system configuration. In the meantime, a gray box may appear while the window is loading. Do not use the mouse or keyboard during this time.

Note: The following example is for illustration purposes only, and may not reflect what appears on your system:



7 Click Select All to choose all of the available PEPs, and then click Next.

Result: The Nortel System Operations window appears and lists all components in the order in which they will be installed.



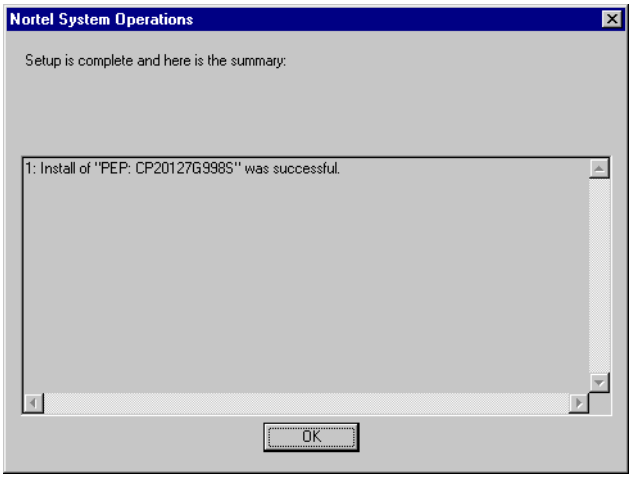
8 Click Yes to continue.

Result: The selected PEPs check the system to determine if any tools are open. If tools are open, you receive the following warning:

Close the tools, and then click Retry.

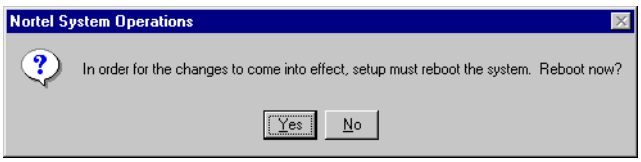
The system automatically shuts down all services, and the PEPs are installed. The time it takes to shut down the services and install the PEPs is based on what is contained in the PEPs. This can be a minimum of 10 to 15 minutes.

When PEP installation is finished, a summary of the installation appears, showing the success or failure of each PEP operation. The PEPs displayed may be different for your server.



9 Click OK.

Result: The following dialog box appears:



10 Click Yes to restart the server.

11 Wait until CallPilot starts fully into service (about 10 to 15 minutes).

12 Do one of the following:

IF you executed the runme.exe file	THEN
from the CD-ROM's root directory	continue with "What's next?" below. The runme.exe file in the CD-ROM's root folder installs all of the PEPs that you choose from the subdirectories on the CD-ROM.
from a PEP folder on the CD-ROM	repeat this procedure, as required, to ■ review the readme.txt file in each PEP folder ■ execute the runme.exe file in each PEP folder

What's next?

Continue with "Phase 5: Logging on to the CallPilot server with CallPilot Manager" on page 88.

Chapter 3

Upgrading the CallPilot 2.01 server to CallPilot 2.02

In this chapter

Overview 66

Phase 1: Completing the Upgrade Readiness Checklist 68

Phase 2: Updating the operating system 76

Phase 3: Upgrading the CallPilot 2.01 software to CallPilot 2.02 78

Phase 4: Installing Performance Enhancement Packages 82

Overview

Introduction

This section describes how to upgrade your CallPilot server software from Release 2.01 to Release 2.02. The following upgrade paths are supported:

- from Release 2.01 to Release 2.02
- from Release 2.01 SU1 to Release 2.02

You cannot downgrade to a previous release of CallPilot software.

Carefully follow the upgrade procedures in this section. You may need to refer to the NTPs in the *CallPilot Installation and Configuration* binder for your server model for more information.

CallPilot 2.01 or 2.01 + SU1 PEP upgrade overview

Phase	Description	See
1	Complete the CallPilot Upgrade Readiness Checklist.	“Phase 1: Completing the Upgrade Readiness Checklist” on page 68
2	Update the Windows NT operating system. Click Start → Run to execute Z:\SU2\runme.bat.	“Phase 2: Updating the operating system” on page 76
3	Upgrade the CallPilot server software. Click Start → Run to execute Z:\setup.exe. When you are done, manually restart the server.	“Phase 3: Upgrading the CallPilot 2.01 software to CallPilot 2.02” on page 78
4	Apply any PEPs. ■ CallPilot server software: Click Start → Run to execute Z:\runme.exe. ■ CallPilot Manager software: Click Start → Run to execute Z:\cpmgrsetup.exe. When you are done, restart the server.	“Phase 4: Installing Performance Enhancement Packages” on page 82

Phase	Description	See
5	Configure the CallPilot server. With Internet Explorer, connect to the following URL: http://<*server name*>/cpmgr/login.asp where *server name* is the CallPilot server's computer name. Run the Configuration Wizard, and then restart the system into service.	■ "Phase 5: Logging on to the CallPilot server with CallPilot Manager" on page 88 ■ "Phase 6: Running the Configuration Wizard" on page 92
6	Test the CallPilot upgrade. If the system is working as expected, complete other configuration tasks, as required.	"Phase 7: Completing post-configuration tasks" on page 105

Phase 1: Completing the Upgrade Readiness Checklist

Introduction

Use this checklist to ensure that your CallPilot server is ready for upgrade. This checklist enables you to

- avoid significant lost time and costs during the upgrade
- significantly reduce system downtime resulting from upgrade problems that might have been prevented

ATTENTION

To successfully upgrade a system from CallPilot 2.01 (with or without SU1) to CallPilot 2.02, you must complete the following detailed step-by-step procedures *exactly* as described. Failure to do so may result in a failed upgrade and require the system to be restored to its previous release from a current backup.

ATTENTION

Do not assume that an upgrade to CallPilot 2.02 will cure an unhealthy CallPilot system. If the CallPilot system is experiencing problems before you start the upgrade, those problems may cause the upgrade to fail. An upgrade failure can cause the system to be damaged beyond repair, and require you to reinstall the operating system, CallPilot software, or both.

Ensure that system problems are resolved before you begin the upgrade.

1. Ensure that all hardware is working correctly.

If any hardware is not functioning correctly, arrange to have it repaired or removed.

2. Gather the materials you need for the upgrade.

To perform an upgrade to CallPilot 2.02, you need the following items:

Items	Description
CallPilot 2.02 CD-ROMs	❒ CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM
	❒ CallPilot 2.02 Server Software CD-ROM

Items	Description
CallPilot 2.02 CD-ROMs (continued)	❒ CallPilot 2.02 PEP CD-ROM ❒ one or more of the CallPilot 2.02 Language CD-ROMs (3) ❒ CallPilot 2.02 Desktop Messaging Client Software and Updates CD-ROM ❒ CallPilot 2.02 Documentation CD-ROM
Printed documents	❒ the readme.txt file from the CallPilot 2.02 OS Recovery CD-ROM or the CallPilot 2.02 OS Upgrade CD-ROM **Note:** This *CallPilot Upgrade Guide* contains all of the information you need to complete the upgrade. However, the readme.txt file may contain last minute information. Refer to the readme.txt file only if you need more guidance during the upgrade. ❒ this guide ❒ the latest *CallPilot 2.02 General Release Bulletin* ❒ CallPilot 2.02 *Installation and Configuration* binder for the server model ❒ *Product Bulletin 2003-0151-Global: CallPilot Support for AntiVirus Applications* (to verify or perform antivirus software configuration after a successful upgrade)
Information (in written form)	❒ a CallPilot mailbox, a phoneset, and the Voice Messaging phone number to ensure that CallPilot is operational after the upgrade ❒ if you have the fax or speech recognition options, a fax machine and the phone numbers for Express Fax Messaging, Speech Activated Messaging, or both ❒ the current password for the Administrator, NGenSys, or NGenDist account If you are unfamiliar with these passwords, contact the network administrator. ❒ the customer's network settings (CLAN and ELAN IP addresses, subnet masks, and default router/gateway address) ❒ the customer's Remote Access Service (RAS) IP address pool settings If the upgrade fails, you must reconfigure these settings after reinstalling the Windows NT operating system and CallPilot server software.

Items	Description
Hardware	❒ *200i or 201i server only:* ▪ External CD-ROM drive (NTRH9037/A0683739) or CD-ROM kit (NTUB59AA/A0744832) ▪ External Tape drive (NTRH9038/A0683740) or Tape drive kit (NTUB53AA/A0739901) ❒ *200i server only:* MAS PCMCIA Flash Recovery card (NTRH9055/A0744464) If the upgrade fails, you may need this item to reinstall the Windows NT operating system and CallPilot server software.

3. Perform a full system backup of the system.

1 Log on to the CallPilot server with CallPilot Manager and ensure that an up-to-date full system backup is available.

IF a full system backup is	THEN
available	ensure that you have access to the backup tape or backup on a hard drive.
not available	start one. For instructions, refer to the *CallPilot Administrator's Guide* (NTP 555-7101-301) or the CallPilot Manager online Help. The system remains in service during the backup process.

2 Continue with completing other tasks on this "Upgrade Readiness Checklist."

At the same time, monitor the progress of the backup.

3 Ensure that the backup completes successfully, without any errors.

4 If you chose to perform a backup to tape, remove the tape, label it, and put it in a safe location.

4. Verify that CallPilot 2.01 does not have any active alarms.

Use the CallPilot Manager Event Browser and Alarm Monitor to verify that there are no active alarms. This includes looking for alarm 40241 against volume 1, which indicates that MMFS volume 1 is more than 90 percent full.

If any alarms are active, clear them. If MMFS volume 1 is more than 90 percent full, *do not* proceed with the CallPilot server upgrade. An upgrade to the latest release of the voice prompts may fail.

If alarms reoccur within a few hours of normal system usage, they are real problems and must be resolved before you begin the upgrade.

ATTENTION

Do not assume that an upgrade to CallPilot 2.02 will cure an unhealthy CallPilot system. If the CallPilot system is experiencing problems before you start the upgrade, those problems may cause the upgrade to fail. An upgrade failure can cause the system to be damaged beyond repair, and require you to reinstall the operating system, CallPilot software, or both.

Ensure that system problems are resolved before you begin the upgrade.

Note: If there are minor or major alarms that are understood and do not have any impact to the system, it may be acceptable to proceed with the upgrade. Evaluate the alarms carefully before proceeding. When in doubt, contact your Nortel Networks technical support representative.

For more information about reviewing alarms, refer to the *CallPilot 2.02 Administrator's Guide* (NTP 555-7101-301) or the CallPilot Manager online Help.

5. Reassign the CD-ROM drive to drive Z (if required).

ATTENTION

Nortel Networks supports a CallPilot 2.01 to CallPilot 2.02 upgrade from a locally connected CD-ROM drive only. Nortel Networks does not support the use of a network shared CD-ROM drive to upgrade the operating system or CallPilot server software.

If the CallPilot server's CD-ROM drive is not mapped as drive Z:, you must reassign the drive letter to drive Z (see below).

If any files on the CD-ROM drive are open, close them before you perform the following procedure. If files are open, you receive an error message when you attempt to reassign the drive letter.

1 At the CallPilot server, log on to Windows NT with a user ID that has administrative capabilities.

2 Click Start → Programs → Administrative Tools (Common) → Disk Administrator.

3 Right-click the white square next to CD-ROM 0.

4 Select Assign Drive Letter.

5 Choose drive Z.

Result: The following message appears:

```
This assignment will happen immediately, do you wish to
continue?
```

6 Click Yes.

Result: The new drive assignment occurs immediately.

6. Verify that only authorized software and folders are installed.

ATTENTION

If the CallPilot server contains any software that is not authorized by Nortel Networks, you must uninstall it. Unauthorized software can impact CallPilot performance, and can interfere with the upgrade to CallPilot 2.02.

1 Click Start → Settings → Control Panel → Add/Remove Programs → Install/Uninstall tab.

2 Review the list that appears.

The following items are acceptable on the CallPilot server:

- ACE/Client for Windows NT (Install)
- Adobe Acrobat 5.0
- CallPilot
- CallPilot Desktop Messaging for Internet Mail
- CallPilot Manager
- Chinese (Simplified) Language Support
- DIAMOND Display Component Uninstall (1001rp server only)
- Hotfix for Q319733
- Hotfix for Q321599
- IIS Urlscan Tool 2.0 (Uninstall)
- Intel 810 Chipset Graphic Driver End User Diagnostics Software (201i server only)
- MDAC 2.5 SP1
- MetaEdit 2.2 (x86)
- Microsoft Internet Explorer 5.5 and Internet Tools
- Microsoft Posting Acceptor 1.01
- Microsoft Windows Media Player 6.4
- Symantec pcAnywhere

- If a Nortel Networks-approved antivirus software application is installed, one of the following:
  - eTrust InoculateIT for Windows NT (version 4.53 or 6.0)
  - Live Update 1.6 (Symantec Corporation)
  - Norton AntiVirus (2001 or corporate version 7.x)
  - McAfee NetShield for Windows NT (version 4.5)
- If the server is equipped with RAID, one of the following:
  - Mylex Global Array Manager (702t or 1001rp servers only)
  - Mylex Workstation Array Manager (702t or 1001rp servers only)
  - Power Console Plus Package (1002rp server only)
- Windows NT 4.0 Option Pack

If any other software is installed, you must uninstall it.

3 In Windows NT Explorer, determine if the following folders exist:

- c:\windows
- c:\program files\nortel networks
- d:\program files\nortel networks

If these folders exist, delete them. Otherwise, the following error message appears during the Windows NT update:

```
One or more unauthorized software packages has been
installed on the CallPilot server. This may cause problems
for the CallPilot upgrade. Please remove all unauthorized
software. Terminating upgrade
```

7. Split the RAID drives (if required).

If the CallPilot server is equipped with a RAID controller, you must split the drives in the RAID system pack just before you begin the upgrade. This procedure breaks the mirroring of the hard drives so that if the upgrade fails, you can quickly return the server to the state it was in before you started the upgrade.

For instructions on how to split the RAID drives, refer to the section entitled “Splitting RAID drives and upgrading software” for your RAID controller in Part 5 of the *CallPilot 2.02 Installation and Configuration* binder.

8. Ensure that CallPilot 2.01 is fully functioning and able to take calls.

1 Ensure that a system backup is not in progress.

2 Verify that no new alarms occurred.

If new alarms occurred since you last checked them, resolve them.

3 Verify that the system-ready indicator states that CallPilot services have started and that CallPilot is ready to accept calls.

For more information, refer to Part 3 of the *CallPilot 2.02 Installation and Configuration* binder.

4 Test the CallPilot system as follows:

a. Make several test calls, and confirm that CallPilot answers.

b. Leave and retrieve messages.

c. Verify that the MWI indicator on the phoneset is updated.

d. Verify that ELAN and CLAN configuration are correct and that no IP address conflicts exist for either the ELAN or the CLAN.

ATTENTION

After you verify that the system is operational, ensure that you do not disconnect it from the LAN or switch before you begin the upgrade to CallPilot 2.02. If the server is disconnected (and then reconnected), you must verify system operation again.

9. Courtesy stop all channels.

If any DSP and DS0 channels are not idle, courtesy stop them.

If you do not courtesy stop the channels, any calls that are active are suddenly terminated during the upgrade. For instructions, refer to "Managing channels" in the *CallPilot Administrator's Guide* (NTP 555-7101-301).

Note: After the upgrade to CallPilot 2.02, you must manually start the channels using CallPilot Manager. If you do not manually start the channels, CallPilot will not start completely.

10. Verify that the server BIOS is configured to start the server from the hard drive.

The CallPilot 2.02 OS Recovery and CallPilot 2.02 OS Upgrade CD-ROMs are bootable CD-ROMs. You must ensure that the CallPilot tower or rackmount server's BIOS is configured to start the server from the hard drive instead of from the CD-ROM drive. This will prevent the MS-DOS 6.2 Startup Menu on the OS Recovery or OS Upgrade CD-ROM from appearing after each server restart during the Windows NT operating system update.

1 Restart the server and at the appropriate moment, enter the BIOS setup.

For more information, see "Changing the BIOS boot device priority" in Part 4 of the CallPilot 2.02 *Installation and Configuration* binder.

2 Change the boot priority option to the following order:

- floppy drive (Removable Devices)
- hard drive
- CD-ROM drive
- any other devices

3 Save the new BIOS settings, and then restart the server.

What's next?

When all tasks in the Upgrade Readiness Checklist are completed, the CallPilot server is ready for the Windows NT update and the CallPilot 2.02 upgrade. Continue with "Phase 2: Updating the operating system" on page 76.

Phase 2: Updating the operating system

Introduction

This section describes how to update the operating system on a CallPilot server that is running CallPilot 2.01 or CallPilot 2.01 plus SU1.

To update the operating system for Release 2.02

Note: The update process takes about 15 minutes depending on the speed of the system. This process can be done using either the CallPilot 2.02 OS Recovery CD-ROM or the CallPilot 2.02 OS Upgrade CD-ROM.

1 Ensure that you are logged on to Windows NT with an account that has administrative privileges (for example, NGenDist), and that CallPilot is completely started into service.

This includes ensuring that no DSP diagnostics are running.

2 Insert the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM into the CD-ROM drive.

3 Click Start → Run.

Result: The Run dialog box opens.

4 Type **z:\SU2\runme.bat**, and then click OK.

Note: The alternate method to run the file is as follows:

a. Click Browse.

Result: The Browse dialog box opens.

b. Navigate to the SU2 folder on the CD-ROM drive (Z:).

c. Double-click the runme.bat file.

Note: If file name extensions are not visible, click View → Details to make them visible.

d. Click OK.

Result: The automated upgrade process begins.

Note: If you receive the following error message, refer to “Verify that only authorized software and folders are installed” on page 72 for instructions on how to recover:

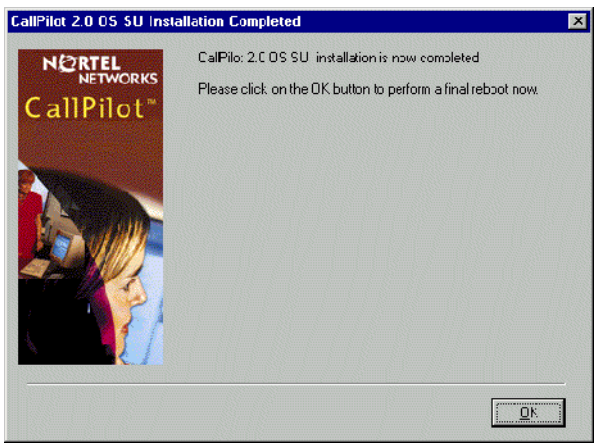
```
One or more unauthorized software packages has been
installed on the CallPilot server. This may cause problems
for the CallPilot upgrade. Please remove all unauthorized
software. Terminating upgrade
```

5

Note: If Application Builder is installed on the CallPilot server, the following message appears:

Uninstall Application Builder, and then re-initiate the runme.bat file from the SU2 folder on the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM.

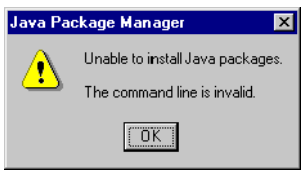
When the update is finished, the following window appears



6 Click OK.

Result: The server restarts automatically.

If the following dialog box appears (it may be hidden behind other windows), ignore it and click OK.



7 Wait for the server to start completely into service.

What's next?

Continue with "Phase 3: Upgrading the CallPilot 2.01 software to CallPilot 2.02" on page 78.

Phase 3: Upgrading the CallPilot 2.01 software to CallPilot 2.02

Introduction

This section describes how to upgrade the CallPilot 2.01 server and CallPilot Manager to CallPilot Release 2.02.

This procedure is supported on only CallPilot systems that are

- connected to a Meridian 1 switch or Succession 1000 system
- running CallPilot server version 2.01.26.05 or 2.01.26.05 plus SU1

To perform the upgrade to CallPilot 2.02

1 Log on to Windows NT using an account with administrative privileges (for example, NGenDist).

2 If antivirus software is present on the CallPilot server, temporarily disable virus scanning.

Note: Reenable it after the upgrade is finished.

3 Ensure that no tools are running (for example, PEP Maintenance utility, Support Tools, and so on).

4 If the CallPilot system is fully functional, courtesy stop all channels on the Channel Monitor page in CallPilot Manager.

For instructions, refer to Part 1 of the *CallPilot 2.02 Installation and Configuration* binder.

5 Insert the CallPilot 2.02 Server Software CD-ROM into the CD-ROM drive.

6 Click Start → Run.

Result: The Run dialog box opens.

7 Type **z:\setup.exe**, and then click OK.

Note: The alternate method to run the file is as follows:

a. Click Browse.

Result: The Browse dialog box opens,

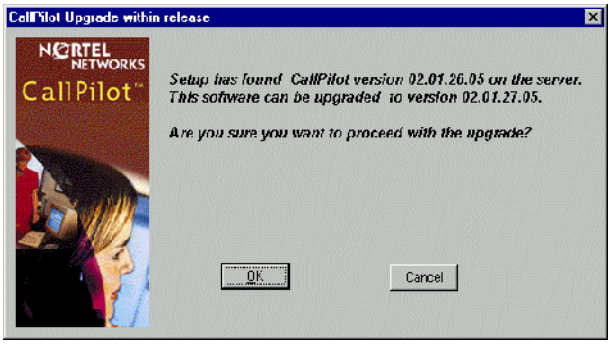
b. Navigate to the root folder on the CD-ROM drive (Z:).

c. Double-click the setup.exe file.

Note: If file name extensions are not visible, click View → Details to make them visible.

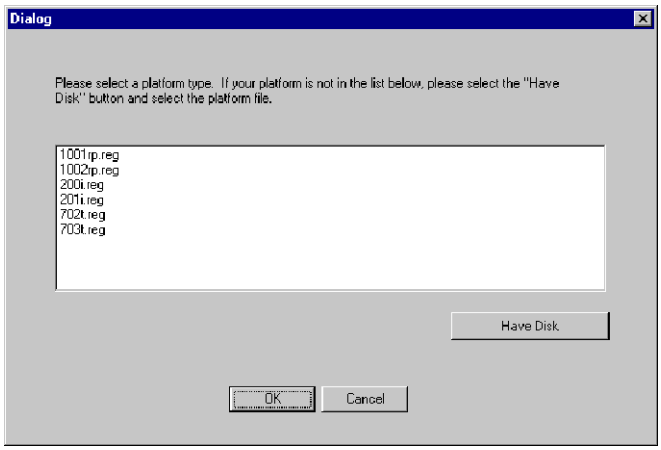
d. Click OK.

Result: The Application Installer checks for a previous release of CallPilot and, if found, displays the following dialog box:



8 Click OK.

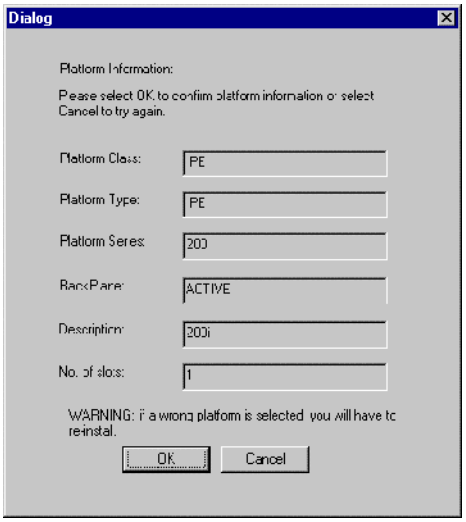
Result: The following dialog box appears:



Note: Occasionally, the platform type window becomes minimized on the taskbar. Click the minimized window to make it reappear.

9 Choose the platform type, and then click OK.

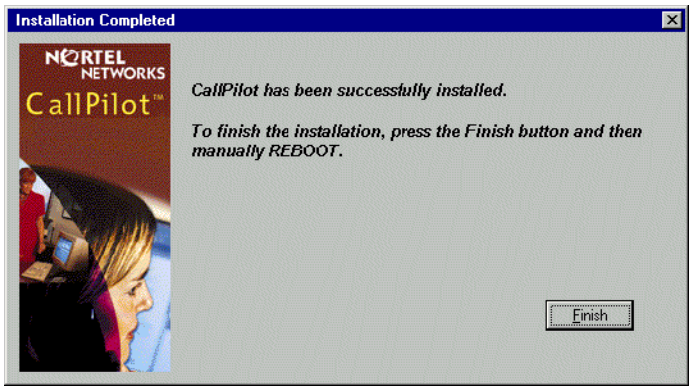
Result: A dialog box similar to the following appears to confirm your platform selection:



10 Verify that you chose the correct platform, and then click OK.

Result: CallPilot updates the Windows NT registry and begins copying files. When finished, the Application Installer automatically upgrades the CallPilot Manager software. The process may take up to 30 minutes. The time required is based on your platform type.

When the CallPilot Manager software upgrade is finished, the following dialog box appears:



11 Remove the CallPilot 2.02 Server Software CD-ROM from the CD-ROM drive.

12 Click Finish.

13 Manually restart the server, as follows:

a. Press Ctrl+Alt+Delete.

Result: The Windows NT Security dialog box appears.

b. Click Shut Down.

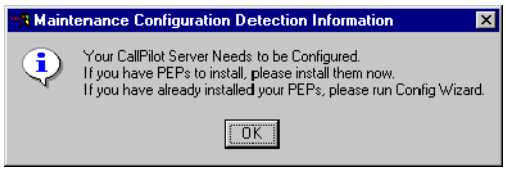
Result: The Shutdown Computer dialog box appears.

c. Choose Shutdown and Restart.

d. Click OK.

Result: The server shuts down and then restarts.

The CallPilot system is not yet fully functional. Therefore, the following message may appear:



e. Click OK.

14 When the logon prompt appears, log on to Windows NT using an account with administrative privileges (for example, NGenDist).

What's next

Continue with "Phase 4: Installing Performance Enhancement Packages" on page 82.

Phase 4: Installing Performance Enhancement Packages

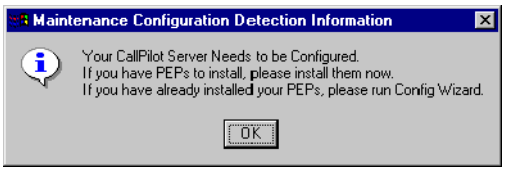
Introduction

Performance Enhancement Packages (PEPs) are software fixes, updates that enhance CallPilot features, or both. PEPs are provided on the CallPilot 2.02 PEP CD-ROM.

PEPs are also provided in service updates after the PEP CD-ROM is released to market. If a service update is available, apply the PEPs from the service update. PEP installation from the PEP CD-ROM is not required.

To install a PEP

Note: The CallPilot system is not yet fully functional. Therefore, the following message may appear:



Click OK, and then continue with the PEP installation, as follows:

1. Insert the CallPilot 2.02 PEP CD-ROM into the CD-ROM drive.
2. Click Start → Run.

   Result: The Run dialog box opens.
3. Click Browse.

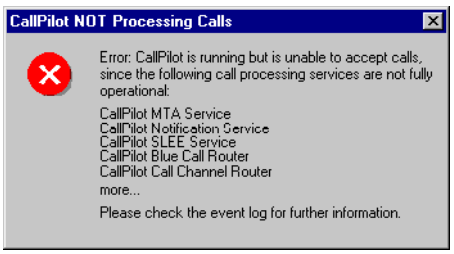
   Result: The Browse dialog box opens.
4. Navigate to the root directory on the CD-ROM drive (Z:).

IF the root directory	THEN
contains a readme.txt file and a runme.exe file	continue with the rest of this procedure.
does not contain a readme.txt file and a runme.exe file	navigate to a PEP directory, and then continue with the rest of this procedure.

5. Open and review any readme files that are present in the directory for specific uninstallation instructions, installation instructions, or both.

6 Double-click the runme.exe file, and then click OK.

Note: If the following dialog box appears, ignore and close it.

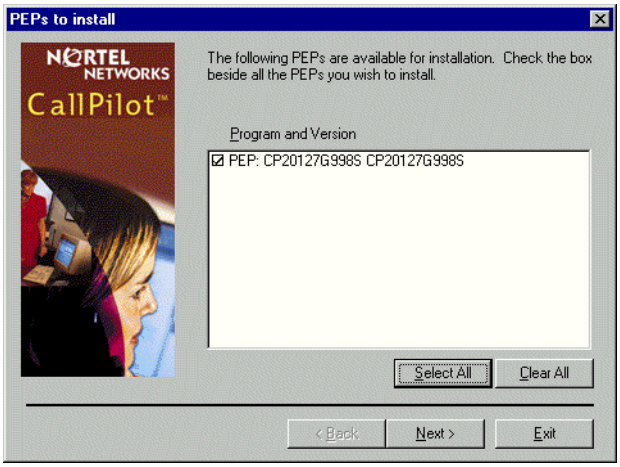


Result: Setup examines the system, and the PEPs to install window appears.

ATTENTION

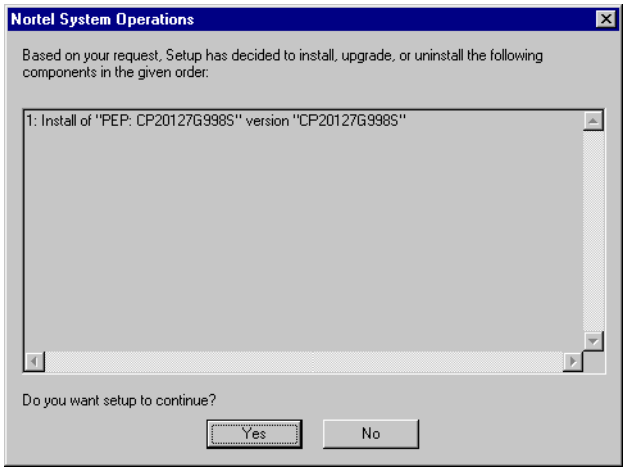
It can take 5 to 20 minutes for the PEPs to install window to appear, depending on the number of PEPs and the system configuration. In the meantime, a gray box may appear while the window is loading. Do not use the mouse or keyboard during this time.

Note: The following example is for illustration purposes only, and may not reflect what appears on your system:



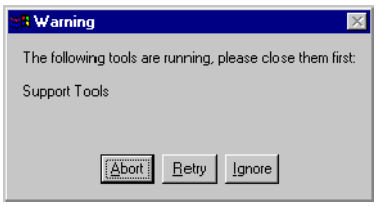
7 Click Select All to choose all of the available PEPs, and then click Next.

Result: The Nortel System Operations window appears and lists all components in the order in which they will be installed.



8 Click Yes to continue.

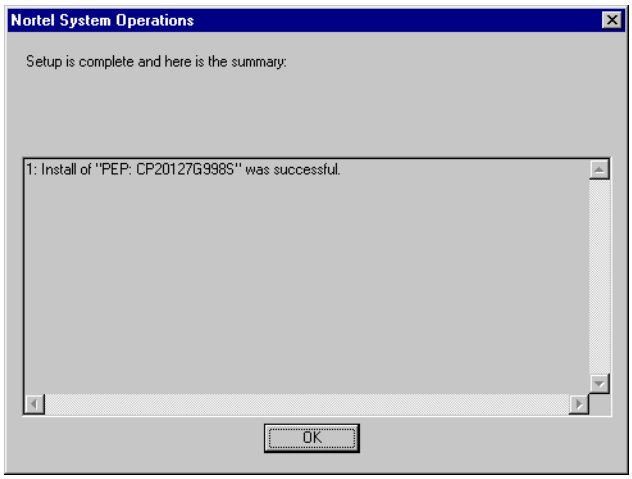
Result: The selected PEPs check the system to determine if any tools are open. If tools are open, you receive the following warning:



Close the tools, and then click Retry.

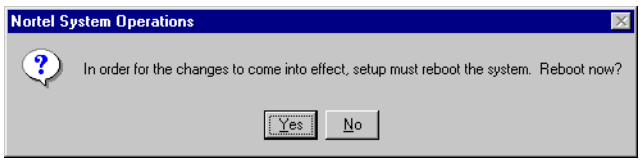
The system automatically shuts down all services, and the PEPs are installed. The time it takes to shut down the services and install the PEPs is based on what is contained in the PEPs. This can be a minimum of 10 to 15 minutes.

When PEP installation is finished, a summary of the installation appears, showing the success or failure of each PEP operation. The PEPs displayed may be different for your server.



9 Click OK.

Result: The following dialog box appears:

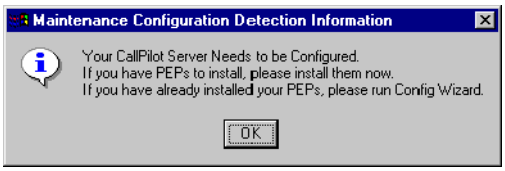


10 Click Yes to restart the server.

Result: The server shuts down and then restarts.

11 When the logon prompt appears, log on to Windows NT using an account with administrative privileges (for example, NGenDist).

Result: The following dialog box appears:



12 Click OK.

13 Wait until CallPilot starts fully into service (about 10 to 15 minutes).

14 Do one of the following:

IF you executed the runme.exe file	THEN
from the CD-ROM's root directory	continue with "What's next?" below. The runme.exe file in the CD-ROM's root folder installs all of the PEPs that you choose from the subdirectories on the CD-ROM.
from a PEP folder on the CD-ROM	repeat this procedure, as required, to ■ review the readme.txt file in each PEP folder ■ execute the runme.exe file in each PEP folder

What's next?

Continue with "Phase 5: Logging on to the CallPilot server with CallPilot Manager" on page 88.

Chapter 4

Configuring the CallPilot system

In this chapter

Phase 5: Logging on to the CallPilot server with CallPilot Manager 88

Phase 6: Running the Configuration Wizard 92

Phase 7: Completing post-configuration tasks 105

Enabling desktop messaging and My CallPilot (optional) 110

Phase 5: Logging on to the CallPilot server with CallPilot Manager

Introduction

You must use a web browser to log on to and administer the CallPilot 2.02 server.

The logon process is completed in two stages:

1. Launch the web browser on the CallPilot server.

   The web browser on the CallPilot server is configured to automatically connect to the CallPilot Manager web server.

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

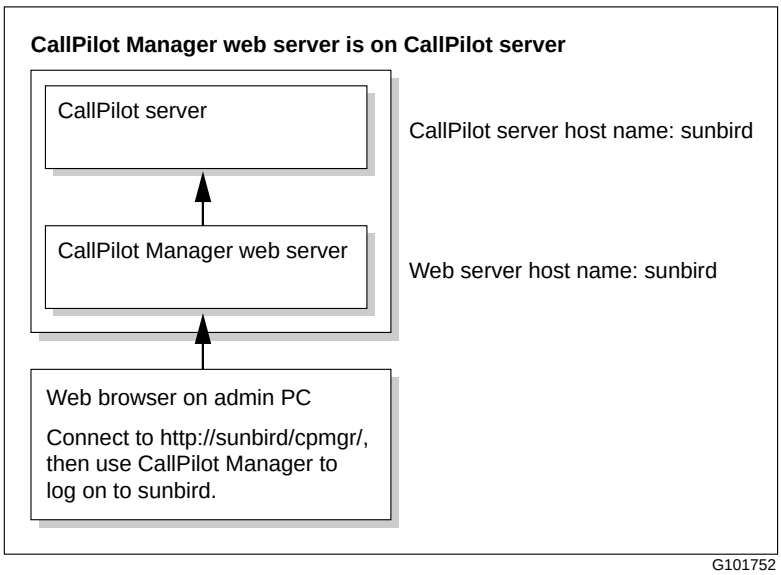
2. Log on to the CallPilot server with an administrator's mailbox number and password.

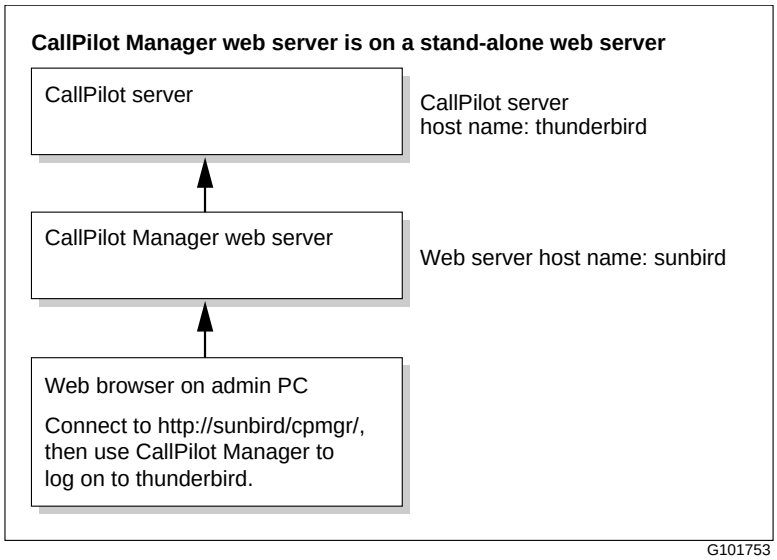
Relationship of the CallPilot Manager web server to the CallPilot server

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

See the diagrams that follow.

Note: For instructions on how to install CallPilot Manager on a stand-alone web server, see Chapter 5, "Installing CallPilot administrative software on a stand-alone web server."





To log on to the CallPilot server

1 Log on to Windows NT using an account with administrative privileges (for example, NGenDist).

ATTENTION

If the server was recently restarted, wait until the IIS Web Server has started. If this service is not started, you will receive a “Page Not Found” error when you perform step 2.

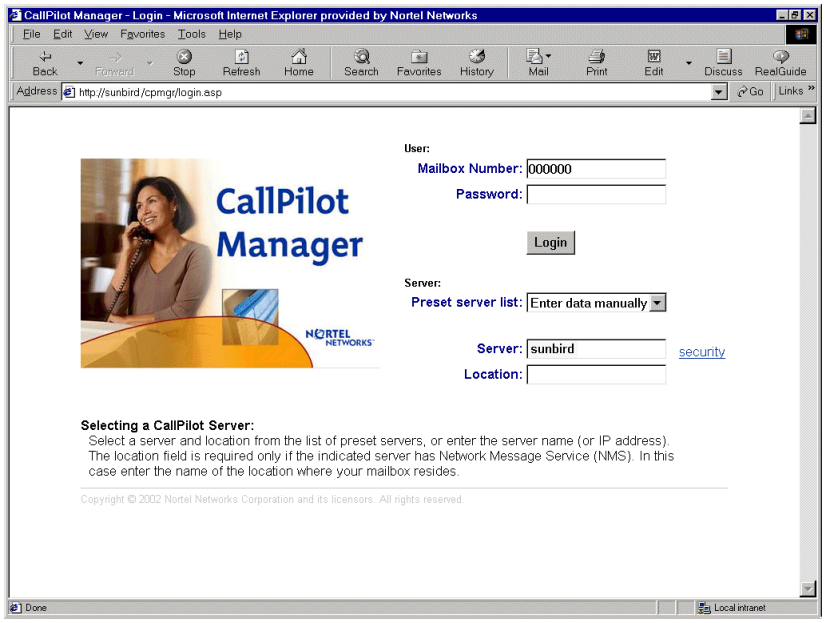
2 Launch the web browser on the CallPilot server.

Note: If you receive the Page Not Found message, wait 5 minutes, and then try again.

3 Type the CallPilot Manager web server’s URL in the Address or Location box of the web browser, and then press Enter.

Example: http://sunbird/cpmgr/

Result: When the connection is established, the CallPilot Manager - Login page appears.



Note: The URL automatically appears as http://<*web server host name* or *IP address*>/cpmgr/login.asp.

4 Type the administrator mailbox number and password.

If the administrator mailbox was not changed in CallPilot 2.0, the administrator mailbox number is **000000**, and the default password is **124578**.

5 Do one of the following:

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

6 Click Login.

Result: The main CallPilot Manager page appears.

What's next?

If you performed a CallPilot 1.07 to CallPilot 2.02 upgrade, the system prompts you to change the default password for the administrator mailbox. Change the password to a value that is known only by the customer.

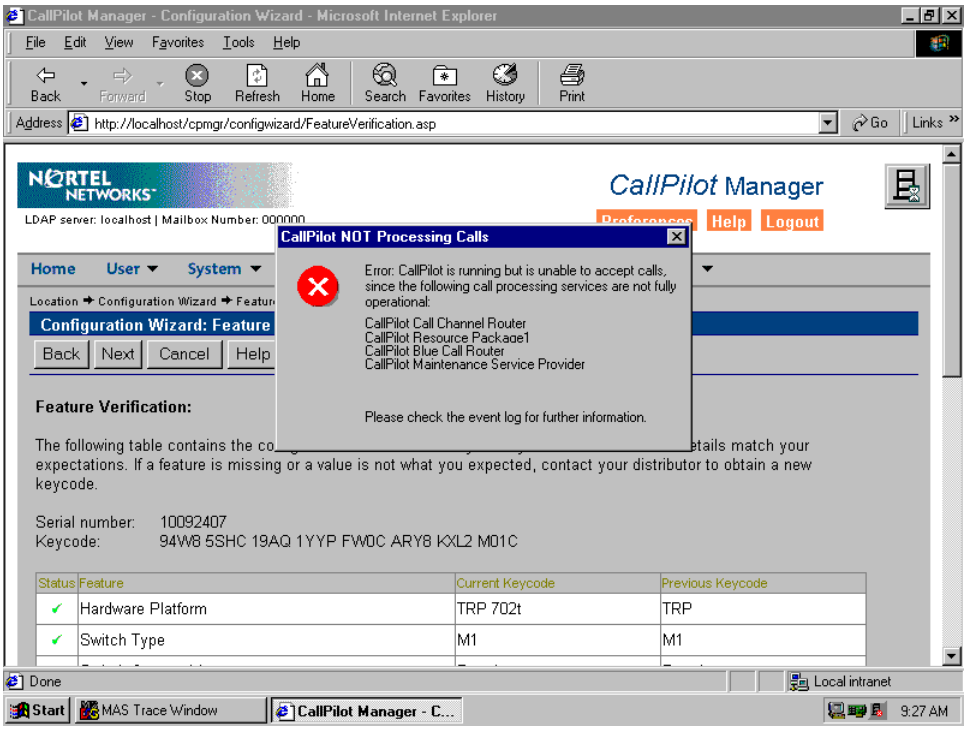
Continue with "Phase 6: Running the Configuration Wizard" on page 92.

Phase 6: Running the Configuration Wizard

Introduction

This section describes how to configure the CallPilot server. Configuration is required to complete the upgrade.

Since the CallPilot system is not yet configured, the following dialog box can appear while you are running the Configuration Wizard.

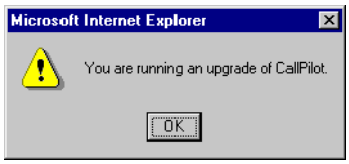


Disregard the error message, close the dialog box and continue the configuration procedure.

To run the Configuration Wizard

1 In CallPilot Manager, click Configuration Wizard.

Result: The following dialog box appears:

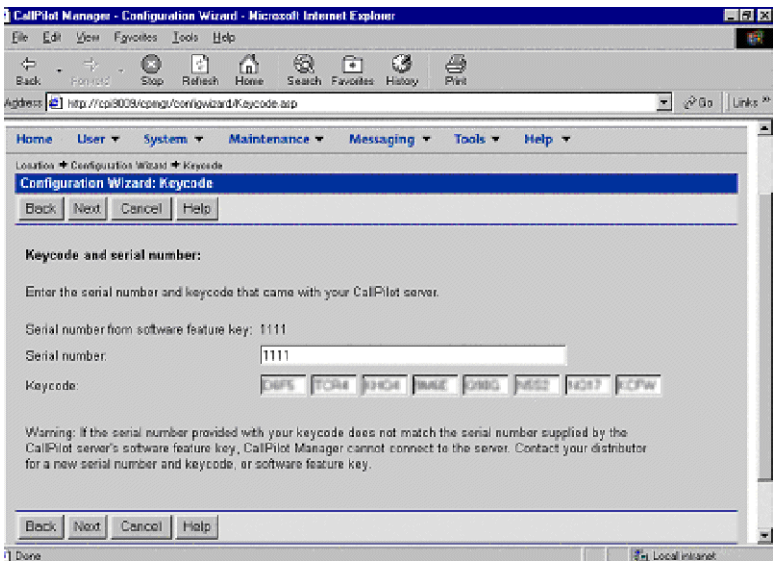


2 Click OK.

Result: The following page appears:

3 Click Next on the Welcome page.

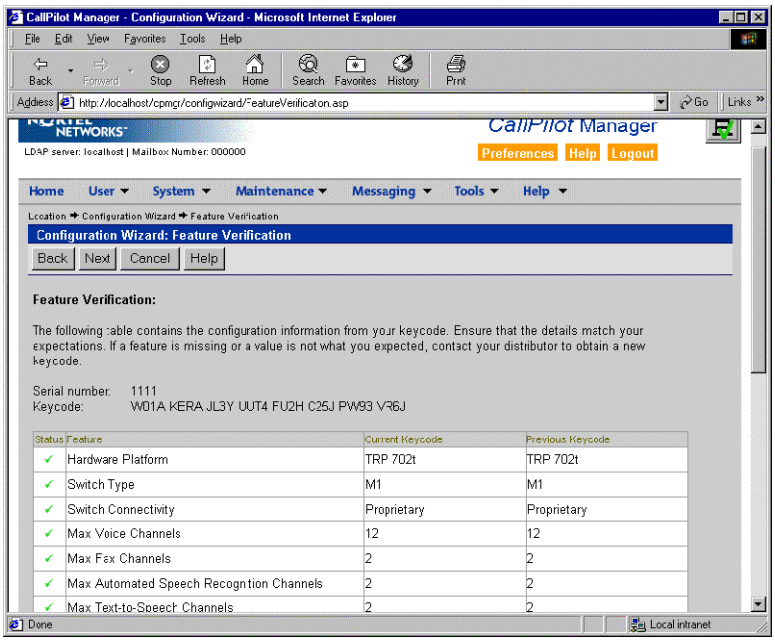
Result: The Keycode and serial number page appears:



4 Do one of the following:

IF you upgraded from	THEN
CallPilot 1.07 to CallPilot 2.02	ensure that the serial number and keycode are correct, and then click Next.
CallPilot 2.01 to CallPilot 2.02	click Next.
CallPilot 2.01 to CallPilot 2.02 AND are expanding features	type the new keycode, and then click Next.

Result: The Feature Verification page appears:

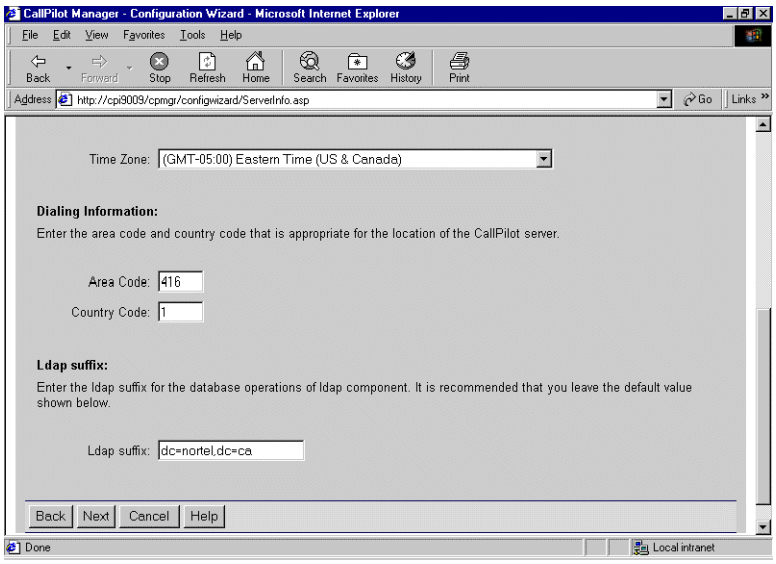


5 Ensure that the details on the page match your expectations.

If a feature is missing or not what you expected, acquire a new keycode from your Nortel Networks distributor.

6 Click Next.

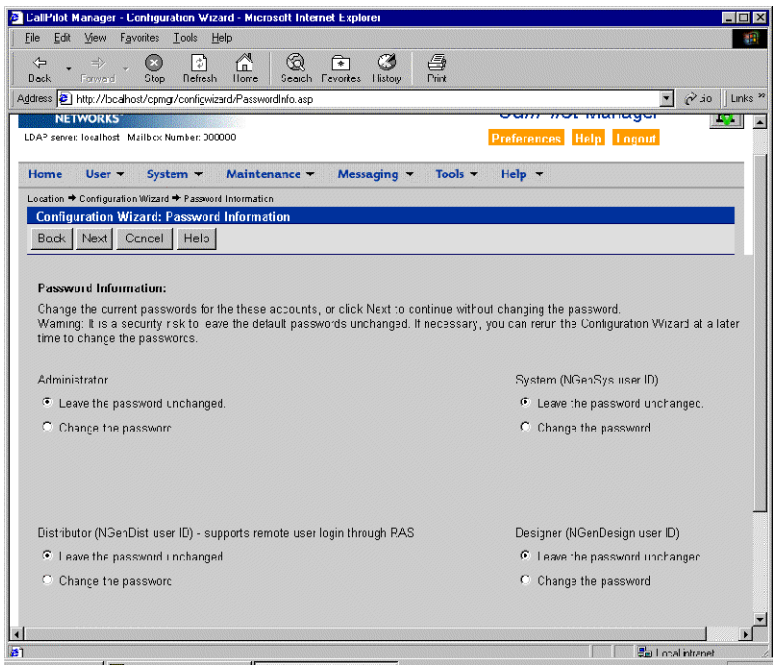
Result: The following page appears:



7 Verify that the time zone is correct. If it is not correct, choose the time zone for the server from the list box.

8 Verify that the area and country codes are correct, and then click Next.

Result: The Password Information page appears:

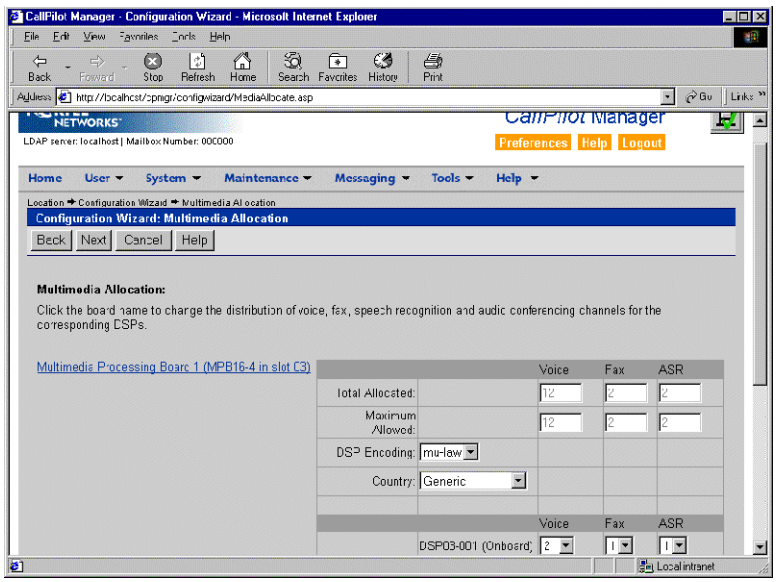


ATTENTION

Nortel Networks strongly recommends that you change all passwords to strong passwords.

9 Change the passwords, and then click Next.

Result: The Multimedia Allocation page appears:

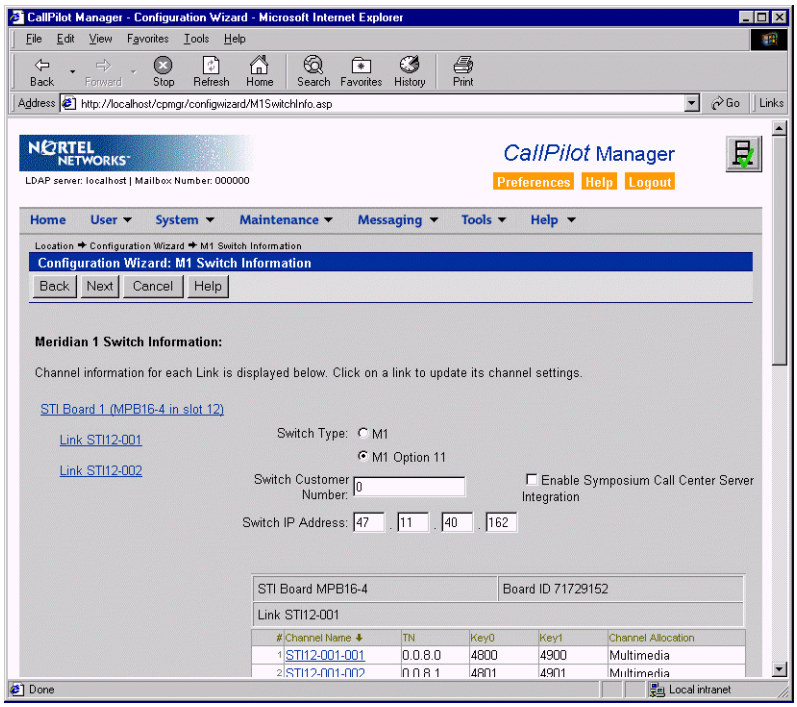


10 Verify that the number of MPB boards and DSPs match the hardware that is installed inside the CallPilot server.

11 Change the port allocations as required.

12 Click Next.

Result: The Switch Information page appears:



Note: This page applies also to both the Meridian 1 switch and the Succession 1000 system.

13 Verify that the switch type, customer number, and switch's IP address are correct.

14 If CallPilot is networked with Symposium Call Center Server, do the following:

a. Ensure that the Enable Symposium Call Center Server Integration check box is checked.

b. Specify the IP address for Symposium Call Center Server.

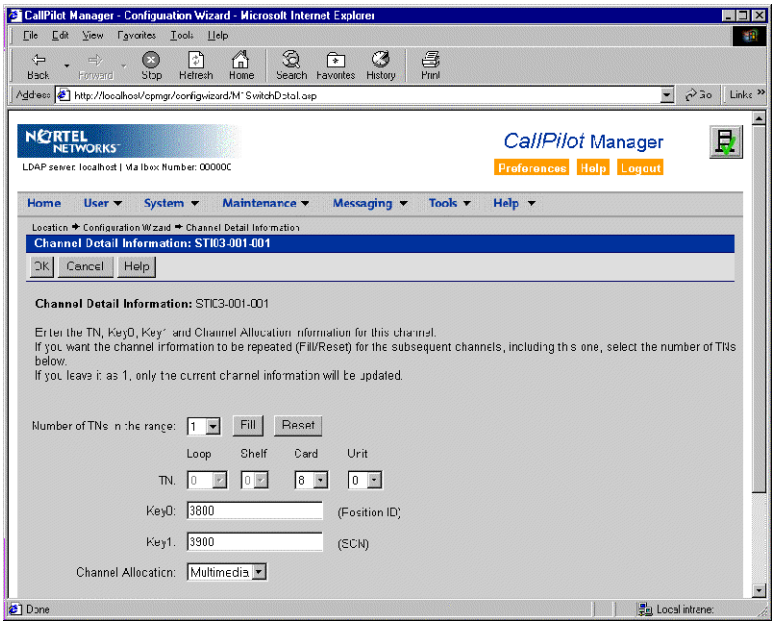
If the MPB16 boards were repositioned as described in "Determine if hardware changes are required" on page 17, you must reconfigure TN assignments to match the new board positions.

15 Verify that TN allocations to services are correct.

If you need to make changes, do the following:

a. Click the first link below the MPB board.

Result: The Channel Detail Information page appears:



b. Do one of the following:

IF you want to	THEN
clear the information already configured	click Reset.
data fill a single channel	specify the TN, Key 0, and Key 1 information.
data fill a range of channels	do the following: **a.** Specify the number of TNs you want to configure. **b.** Specify the starting values for TN, Key 0, and Key 1. **c.** Click Fill.

c. Choose the channel allocation as follows:

IF the channels are dedicated to	THEN
a multimedia service	choose Multimedia from the Channel Allocation list box.

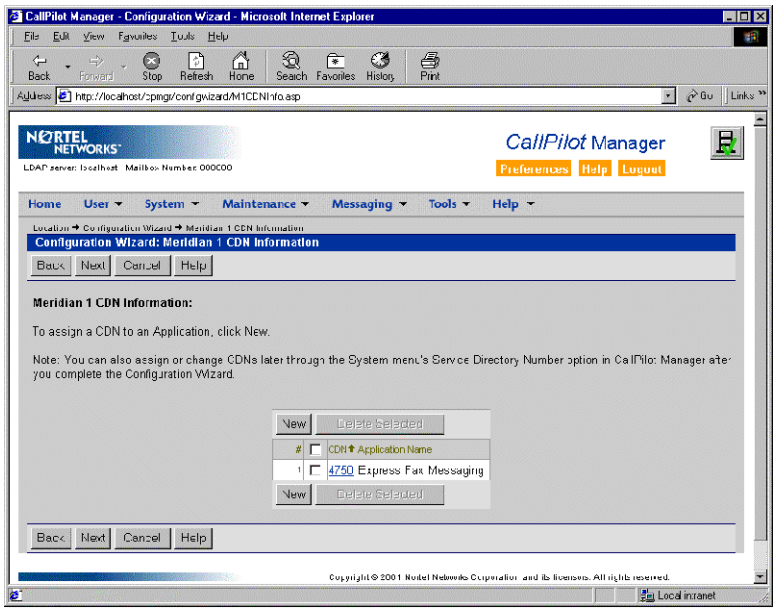
IF the channels are dedicated to	THEN
Symposium Call Center Server	choose Access from the Channel Allocation list box.

d. Click OK.

Result: The system returns you to the Meridian 1 Switch Information page.

16 Click Next.

Result: The CDN Information page appears:



17 Verify the CDN configuration.

If you need to make changes, do the following:

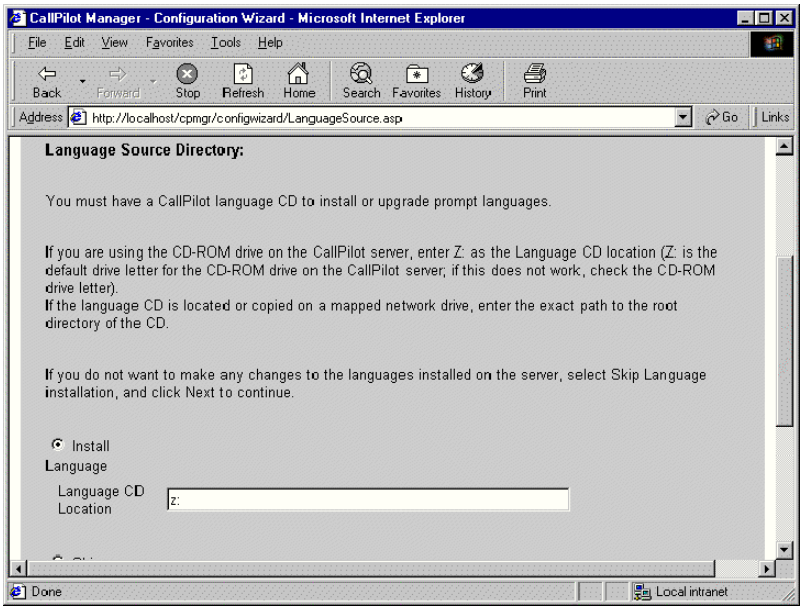
a. Click New to add a new CDN.

Result: The system prompts you for the CDN and the name of the application to be dedicated to the CDN.

b. Specify the CDN, choose the application, and then click OK.

Result: The system returns you to the CDN Information page.

18 Click Next to proceed to the Language Source Directory page:



19 Do the following (you must reinstall languages):

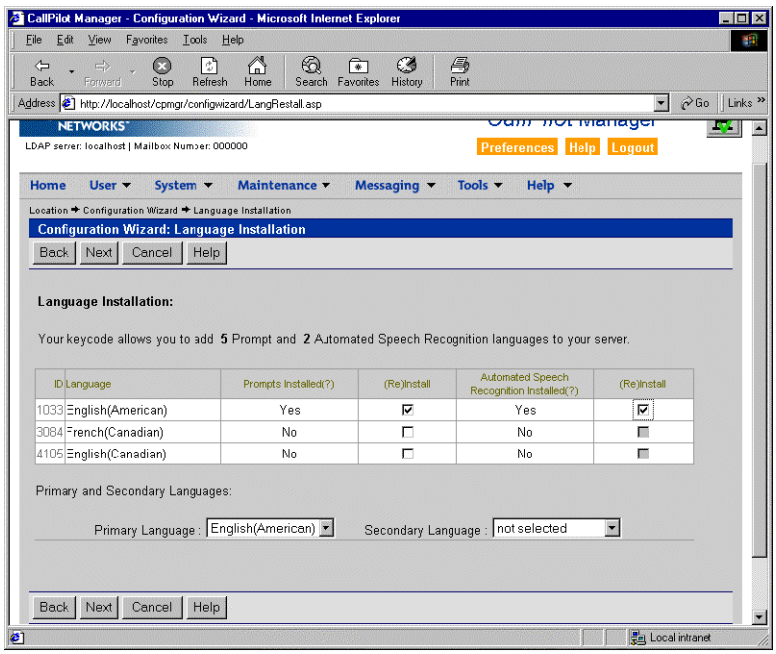
a. Click Install Language.

b. Specify the path to the Language CD-ROM.

c. If a CD-ROM is in the CD-ROM drive from a previous action, remove it and insert the Language CD-ROM.

d. Click Next.

Result: The Language Installation page appears:



20 You must select and reinstall languages.

Do the following:

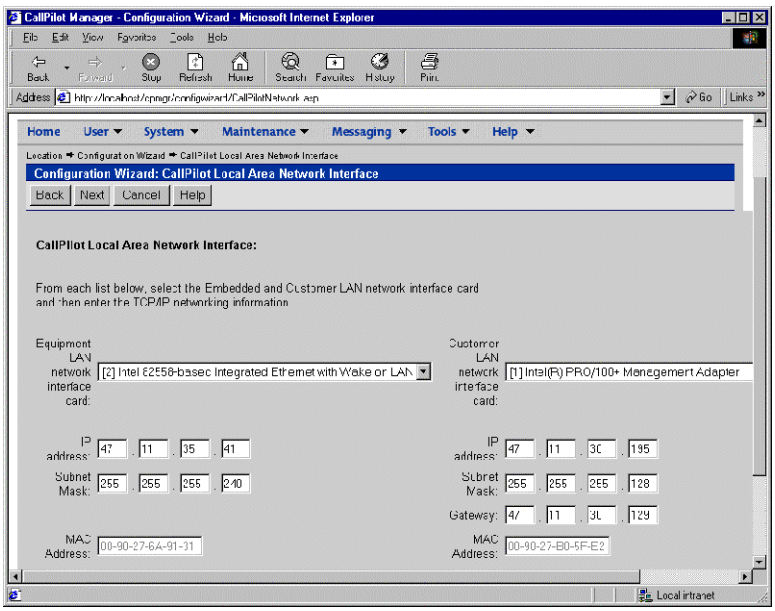
a. Choose the languages you want to install for the Prompts and Automated Speech Recognition options.

b. Choose the primary and secondary languages.

c. Click Next.

Note: If you want to install languages from more than one language CD-ROM, you must run the Configuration Wizard again after you complete this procedure. You can run the Configuration Wizard in Express Mode; Express Mode allows you to access the Language Installation page (or any other page) directly, rather than proceed through each page in the Configuration Wizard.

Result: The CallPilot Local Area Network Interface page appears:



21 Verify that the configuration is correct for the ELAN and CLAN cards:

If you need to make changes, do the following:

a. Choose the card that has been assigned to the ELAN.

IF the CallPilot server is a	THEN
200i server	■ the ELAN is defined as the first network adapter (AMD PCNET Family Ethernet), and is represented as [1]. ■ the CLAN card is the second network adapter (3Com Etherlink III or 3Com LAN Megahertz), and is represented as [5].
201i server	■ the CLAN is defined as the first Intel network adapter, and is represented as [1]. ■ the ELAN is the second Intel network adapter, and is represented as [5].

IF the CallPilot server is a	THEN
702t server	■ the CLAN is defined as the first network adapter (Intel Pro 100), and is represented as [1]. ■ the ELAN is the second network adapter (Intel 82558-based Integrated Ethernet), and is represented as [2].
1001rp server	the order of the ELAN and CLAN adapters may vary because the order is based on the slots in which the cards are installed. You can determine which adapter is ELAN or CLAN by reviewing the 1001rp slot assignment and IRQ mapping information in Part 2 of the *CallPilot Installation and Configuration* binder.
1002rp server	■ the ELAN is defined as the first Intel network adapter, and is represented as [1]. ■ the CLAN is the second Intel network adapter, and is represented as [2].

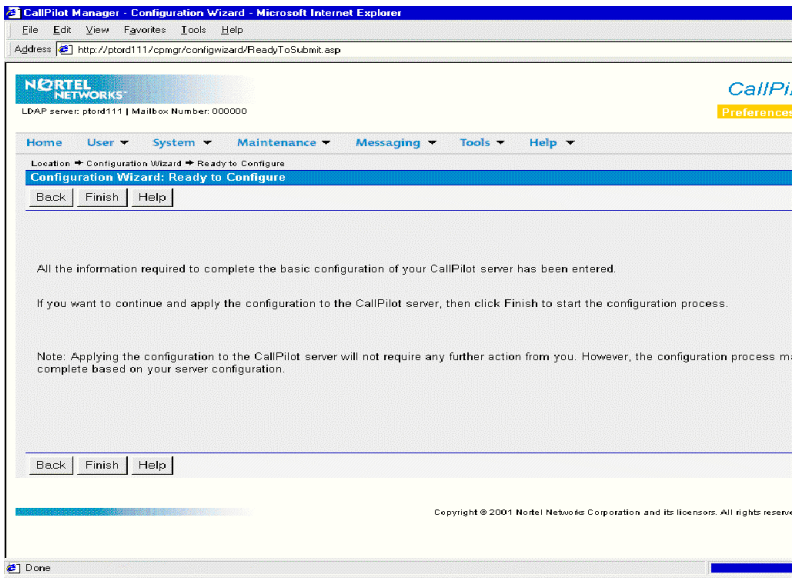
b. Specify the IP address and subnet mask for the ELAN.

c. Repeat steps a and b for the CLAN.

d. Specify the gateway for the CLAN.

22 Click Next.

Result: The Ready to Configure page appears:



23 Click Finish.

Result: The following message appears:

```
Applying your changes will take your CallPilot server out
of service. Press OK to continue.
```

24 Click OK.

Result: The configuration is applied to the server. This can take up to 1 hour to complete.

25 Click OK at the completion confirmation.

Result: The system returns you to the main CallPilot Manager page.

26 Log off from CallPilot Manager, close the web browser, and then restart the server, as follows:

a. Press Ctrl+Alt+Delete.

Result: The Windows NT Security dialog box appears.

b. Click Shut Down.

Result: The Shutdown Computer dialog box appears.

c. Choose Shutdown and Restart.

d. Click OK.

Result: The server shuts down and then restarts.

What's next?

Continue with "Phase 7: Completing post-configuration tasks" on page 105.

Phase 7: Completing post-configuration tasks

1. Put the system into operation.

1 Log on to Windows NT using an account with administrative privileges (for example, NGenDist).

2 Wait until the CallPilot in Full Service dialog box appears.

This may take several minutes. Before this occurs, you may see the CallPilot Booting or CallPilot NOT in Full Service dialog boxes.

During the restart, a CallPilot Not Processing Calls dialog box may appear reporting the following:

```
Error: CallPilot is running but is unable to accept calls,
since the following services are not fully operational:
(list). Please check the event log for further info.
```

Ignore this message and wait for the CallPilot in Full Service dialog box that states

```
CallPilot is running and able to accept calls.
```

3 Log on to the server with CallPilot Manager and do the following:

a. If channels were courtesy stopped before the upgrade, start them.

b. Click System → Service Directory Number, and then verify the Service Directory Number (SDN) configuration.

4 Test the CallPilot upgrade as follows:

a. At a phoneset, dial the primary Voice Messaging DN.

Result: You should hear voice and be able to log on to CallPilot.

b. Verify that you can record and leave a message.

c. Verify that you can retrieve and listen to the message.

For instructions on testing the CallPilot system operation, refer to “Testing the CallPilot installation” in Part 3 of the CallPilot 2.02 *Installation and Configuration* binder.

IF CallPilot	THEN
responds as expected	complete the rest of the tasks in this guide.

IF CallPilot	THEN
does not respond as expected	you may have to revert the system back to the previous release. You can do this as follows: ■ Non-RAID system: You must reinstall your Windows NT operating system (with the most recent OS version), reinstall the previous version of CallPilot server software, and then perform a restore from tape. For instructions, refer to Part 5 of the CallPilot 1.07 *Installation and Configuration* binder, and the *CallPilot 1.07 Administrator's Guide* (NTP 555-7101-301). ■ RAID system: Resynchronize the hard drives with the previous version of CallPilot. For instructions, refer to Part 5 of the CallPilot 2.02 *Installation and Configuration* binder. Contact your Nortel Networks technical support representative before you proceed.

2. Change account passwords.

Ensure that the passwords for the following Windows NT accounts are changed from their default values to strong values that are known only by the customer:

- Administrator
- NGenSys
- NGenDist
- NGenDesign
- Gamroot (if it exists)

ATTENTION

Do not change the passwords for the following accounts:

- cpfilexfer
- IUSR_computername
- IWAM_computername

These accounts provide restricted functionality, and changing their passwords may prevent CallPilot from operating.

1 Click Start → Programs → Administrative Tools → User Manager for Domains.

2 Change the password for each account.

3. Configure additional features that were purchased, if required.

1. Configure fax services, if required.
   - **a.** Apply RPLs to fax callbacks and fax printing.
   - **b.** Verify the express fax messaging profile.
   - **c.** Configure fax callback handling and other fax options.
   - **d.** Update or add mailbox classes to enable fax capability for groups.
   - **e.** Configure fax general delivery and fax overflow mailboxes.
2. Configure speech activated messaging services, if required.

   Update or add mailbox classes to enable speech activated messaging for mailbox class members.
3. Configure E-mail-by-Phone options, if required.
   - **a.** Define external e-mail servers.
   - **b.** Define E-mail-by-Phone options.
   - **c.** Update or add mailbox classes to enable speech activated messaging for mailbox class members.
   - **d.** Enable encryption for E-mail by Phone by executing the nmcrypt_updtkey.exe file.

     — Open a DOS window.

     — Type **d:\nortel\mpcx\bin\nmcrypt_updtkey.exe**, and then press Enter.
4. Enable mailbox owners to use desktop messaging and My CallPilot.

   For instructions, see “Enabling desktop messaging and My CallPilot (optional)” on page 110.

4. Install antivirus software (optional) or reenable real-time virus scanning.

IF	THEN
antivirus software is currently not installed on the CallPilot server	install antivirus software that has been approved by Nortel Networks for CallPilot. Ensure that you configure it according to Nortel Networks instructions. You must supply your own antivirus software. For more information, refer to *Product Bulletin 2003-0151-Global: CallPilot Support for AntiVirus Applications*. This bulletin provides ■ information about the antivirus software packages that have been approved by Nortel Networks for CallPilot

IF	THEN
antivirus software is currently not installed on the CallPilot server (continued)	■ instructions on how to install and configure the antivirus software See also “To configure antivirus software for correct CallPilot operation” below.
you previously disabled virus scanning on files	reenable real-time virus scanning.

To configure antivirus software for correct CallPilot operation

If you use the default antivirus software settings, this can result in poor CallPilot performance, poor virus protection, or both. You must configure real-time scans to scan only *incoming files*. (A scan on incoming files may also be known as a *scan on create* or a *scan on modified*.)

If you enable scanning on outgoing files (scan on access), then each page that is accessed by CallPilot Manager or My CallPilot must be virus scanned. This type of scanning slows down the CallPilot server (especially if the server is a 200i server).

For more information, refer to *Product Bulletin 2003-0151-Global: CallPilot Support for AntiVirus Applications*.

5. Configure and start the SNMP service.

When you updated the Windows NT operating system for CallPilot 2.02, the SNMP service was automatically disabled. As a result, SNMP alarms cannot be sent to the Network Management System (NMS).

If you are using SNMP in the CallPilot network, you must do the following to ensure that SNMP alarms are sent to the NMS:

- Configure the SNMP service.
- Start the SNMP service.

For instructions, refer to “Configuring CallPilot to send SNMP traps to a Network Management System” in the *CallPilot Administrator’s Guide* (NTP 555-7101-301).

6. Recreate custom events (if any were deleted before the upgrade).

If you deleted custom events before the CallPilot 1.07 to CallPilot 2.02 upgrade, you must recreate them in CallPilot Manager, as follows:

1. In CallPilot Manager, click System → Event Browser.
2. In the Event Browser list box, choose Only Customized Events.
3. Click New.
4. Add the previously recorded events.
5. Click Save.

7. RAID systems only: Resynchronize the hard drives.

If the upgrade was successful, and the CallPilot server is equipped with a RAID controller, resynchronize the hard drives.

For instructions, refer to the section entitled “Splitting RAID drives and upgrading software” for your RAID controller in Part 5 of the *CallPilot Installation and Configuration* binder.

8. Create or update the Windows NT emergency repair disk.

For instructions, see “Creating or updating the emergency repair disk” in Part 4 of the *CallPilot 2.02 Installation and Configuration* binder.

What’s next?

IF	THEN
desktop messaging, My CallPilot, or both, are used	continue with “Enabling desktop messaging and My CallPilot (optional)” on page 110.
desktop messaging, My CallPilot, or both, are not being used	perform a full system backup. For instructions, refer to the *CallPilot Administrator’s Guide* (NTP 555-7101-301).

Enabling desktop messaging and My CallPilot (optional)

Introduction

This section provides an overview of how to configure the following items in CallPilot to function with desktop messaging, My CallPilot, or both:

- CallPilot server's fully qualified domain name (FQDN)
- VPIM/SMTP prefix
- ESN access code
- mailbox class
- Useful Information section in My CallPilot

If you need more information, refer to the CallPilot Manager online Help.

1. Configure the FQDN, VPIM/SMTP prefix, and ESN access code.

1 Log on to the CallPilot server with CallPilot Manager.

2 Click Messaging → Message Network Configuration.

3 Click the server name (often, called Untitled), and then click Show Details.

4 Scroll down to the SMTP/VPIM section.

5 Enter the Fully Qualified Domain Name of the server in the Server FQDN box.

Example: cpserver.mycompany.com

6 Click Save.

Result: The system returns you to the network tree.

7 Click the plus sign (+) next to the server name to expand the CallPilot server tree.

8 Click the primary location name (also often called Untitled), and then click Show Details.

9 Scroll down to the ESN Access Codes section.

10 Enter a code in the ESN Access Code Used by this Location box.

Example: 6, 9, or 1

11 Scroll down to the Location Codes section, and then click Add... .

12 Enter the ESN location code, and then click OK.

Example: 676

13 Scroll down to the VPIM section, and then click Add... .

14 Enter the VPIM/SMTP prefix in the Prefix box, and then click OK.

Example: Use the server's area code or routing prefix.

The VPIM/SMTP prefix can be any number. Usually, this prefix is set to the first 7 digits of the 11-digit phone number (for example, 1612555, where the area code is 612).

15 Click Save.

2. Configure the mailbox class for desktop messaging and My CallPilot features.

1 In CallPilot Manager, click User → Mailbox Classes.

2 Click the mailbox class that you want to configure.

Example: Click Regular User.

3 Optional: Scroll down to the Outcalling (Delivery to Telephone or Delivery to Fax) section, and enable the options that are needed.

Note: The Outcalling Capability check box and the Remote Text Notification Capability check box (see step 4) enable the Remote Text Notification subfeature of the Remote Notification feature.

4 Optional: Scroll down to the Notification of Message Delivery section, and configure the Remote Notification Capability options.

Result: This enables the Remote Notification feature in My CallPilot.

5 Scroll down to the Keycoded Features section.

6 Click the features you want to enable in My CallPilot:

- The Desktop and Web Messaging check box enables viewing and creating messages (required for desktop messaging).
- The Mailbox Manager check box enables all of the options in the Features section of My CallPilot.
- The Fax Capability check box enables the Fax Printing feature.
- The E-mail-by-Phone Capability check box enables the E-mail By Phone feature.

7 Click Save.

3. Configure the Useful information section of My CallPilot (optional, but recommended).

1. In CallPilot Manager, click Tools → My CallPilot Configuration.
2. Type an administration notice in the Useful Information Message Text box.

   Result: This text appears each time a user logs on.
3. Do one of the following:
   - Type appropriate phone numbers in the Dialing Numbers Display section.

   or
   - Click Detect All.
4. Type appropriate information into the Local Support Content section.
5. Click Save.

4. Install desktop messaging on users' personal computers and install My CallPilot on CallPilot servers and stand-alone servers.

For detailed instructions on these tasks, refer to the following documents:

NTP title	NTP number	Task
Desktop Messaging and My CallPilot Installation Guide	555-7101-505	Instaling desktop messaging on the client personal computer Installing My CallPilot on either a CallPilot server or a separate web server
Desktop Messaging and My CallPilot Administration Guide	555-7101-503	Administering desktop messaging and My CallPilot

What's next?

Perform a full system backup.

Chapter 5

Installing CallPilot administrative software on a stand-alone web server

In this chapter

CallPilot Manager requirements 114

CallPilot Reporter requirements 117

Installing CallPilot Manager and Reporter on a stand-alone web server 119

CallPilot Manager requirements

Introduction

In CallPilot 2.02, CallPilot Manager replaces the Administration Client that was used in previous CallPilot releases. CallPilot Manager is always installed on a CallPilot 2.02 server. However, you can choose to install it on a stand-alone web server. This section describes what must be installed on the stand-alone web server before you install CallPilot Manager.

Notes:

- These software requirements are already in place on the CallPilot server. No action is required on the CallPilot server.
- The Nortel Networks technical support personnel use pcAnywhere as a remote support tool. If you require remote support on the stand-alone web server from Nortel Networks, you must install and configure pcAnywhere 8.0 or later on the stand-alone web server and provide remote access connectivity to the server. Remote access can be via either a modem connected to the server's COM port or other RAS equivalent.

When to install CallPilot Manager on a stand-alone server

Install CallPilot Manager on a stand-alone server when you

- want to use CallPilot Reporter

  You cannot install CallPilot Reporter on the CallPilot server.
- expect a large amount of web-based administration traffic, and you want to off-load the work from the CallPilot server

Stand-alone web server requirements

The CallPilot Manager and CallPilot Reporter web-based software run on an Internet Information Server (IIS) version 4 or 5. To support encrypted logon and password change dialog boxes, you require IIS support for secure sockets layer (SSL).

You can use the same server for end user web applications, such as Web Messaging and My CallPilot.

The web server must be running one of the operating systems and components described on the next page. If you are working with an existing web server, some of the components may already be installed. If components are missing, or you are installing a web server for the first time, you must supply your own web server software.

Windows NT 4.0 Server or Workstation

- Windows NT Option Pack, including
  - Internet Information Server (IIS) 4
  - Internet Service Manager
  - World Wide Web Server
  - MDAC 1.5
  - Microsoft Management Console

    Note: Do not install Microsoft Index Server.
  - NT Option Pack Common Files
  - Transaction Server
  - Windows Scripting Host
- Windows Script 5.5 (required by CallPilot Manager *.asp pages)
- MDAC 2.5 (required by the CallPilot Manager Bulk User Add feature)
- Service Pack 6a

  Note: Internet Explorer 5.5 requires the 128-bit version.
- Internet Explorer 5.5
- pcAnywhere 8.0 or later
- Remote Access Service (RAS) (required for downloading operational measurements via the web browser)

Note: Do not use the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM to install the Windows NT operating system on the stand-alone web server. The Windows NT operating system on those CD-ROMs is designed, configured, and licensed for use on the CallPilot server only.

Windows 2000 Server

- Internet Information Server (IIS) 5
  - Internet Service Manager
  - World Wide Web Server
- Windows Script 5.5 (required by CallPilot Manager *.asp pages)
- MDAC 2.5 (required by the CallPilot Manager Bulk User Add feature)
- Service Packs 1 and 2
- Internet Explorer 5.5
- pcAnywhere 8.0 or later
- Remote Access Service (RAS) (required for downloading operational measurements via the web browser)

Filtering software requirements

CAUTION

Risk of incorrect operation

Use caution when installing and configuring e-mail or file filtering software on the CallPilot Manager web server. The .exe file extension must be allowed for HTTP downloads so that the CallPilot Player installer can be downloaded. If you are installing CallPilot Manager and My CallPilot on the same web server, the filtering software must also allow IMAP and HTTP uploads and downloads of the MIME types allowed by the external e-mail servers that you make accessible to My CallPilot.

Client computer requirements

You can use CallPilot Manager on PCs that are running the following operating systems and web browsers. The web browser must have the Adobe Acrobat Reader 5.0 plugin so that you can view the online documents:

Operating system	Internet Explorer 5 or later	Netscape Communicator 6.2 or later
Windows 95B (Retail and OSR2)	yes	yes
Windows 98 SE	yes	yes
Windows NT 4.0 Server	yes	yes
Windows NT 4.0 Workstation	yes	yes
Windows 2000 Professional	yes	yes

Note: You can use other operating systems and web browsers. However, the CallPilot Player may not work correctly.

CallPilot Reporter requirements

Introduction

CallPilot Reporter is a web-based application that helps you analyze and manage your CallPilot system. CallPilot Reporter converts raw statistics from your server into easy-to-read reports, which you can then

- view on the screen
- print on a daily, weekly, or monthly basis
- export to a variety of file formats
- customize for easier reading

CallPilot Reporter is an optional component of CallPilot Manager. If you choose to install CallPilot Reporter, you must install it on the same stand-alone web server as CallPilot Manager. You cannot install CallPilot Reporter by itself. You cannot install CallPilot Reporter on the CallPilot server.

Web server requirements

Since CallPilot Reporter must be installed on the same web server as CallPilot Manager, the web server requirements are the same as for CallPilot Manager. For more details, see “Stand-alone web server requirements” on page 114.

During installation, Crystal Reports and a Sybase database are installed on the web server.

Compatibility with other CallPilot releases

CallPilot Reporter works only with CallPilot 2.0 or later servers. CallPilot Reporter is not backwards-compatible with CallPilot 1.07 or earlier servers.

Printing reports

If you want to print reports on a network printer from the web server (rather than from a client computer’s web browser), you must change the CallPilot Reporter service credentials to a user account with network access privileges. (The CallPilot Reporter service credentials are set by default to LocalSystem.)

Disk space requirements

You need disk space on the web server to store operational measurement data collected by CallPilot. The amount of space depends on the amount of CallPilot traffic and the length of time you want to keep the data. To keep one month of data, allow

- a minimum of 200 Mbytes of space for a smaller system
- up to 1 Gbyte of space for a 96-channel system

Note: On a 96-channel system at full load, 1 hour of usage data consumes about 2 Mbytes on the web server.

Uninstalling CallPilot Reporter

If you uninstall Reporter, you must replace the global.asa file with the original CallPilot Manager version from the Server Software CD-ROM.

Client computer requirements

You can use CallPilot Reporter on PCs that are running the following operating systems. The web browser must have the Adobe Acrobat Reader 5.0 plugin so that you can view the online documents:

- Windows 95B
- Windows 98 SE
- Windows 2000 Professional
- Windows XP
- Windows NT 4.0

You can use one of the following web browsers to access CallPilot Reporter:

- Internet Explorer 5 or later
- Netscape Communicator 6.2 or later

Installing CallPilot Manager and Reporter on a stand-alone web server

Introduction

Before attempting to install CallPilot Manager and CallPilot Reporter on a stand-alone web server, install the prerequisite components. For more details, see "CallPilot Manager requirements" on page 114.

Required materials

To install the CallPilot Manager and CallPilot Reporter applications on a stand-alone web server, you need one of the following:

- CallPilot 2.02 Server Software CD-ROM
- CallPilot 2.02 PEP CD-ROM

  Note: The PEP CD-ROM may contain an updated version of the CallPilot Manager installation software if fixes were made to the software after the Server Software CD-ROM was released. In this case, the updated software is provided in the \CallPilotManagerInstall folder on the PEP CD-ROM.

To install the CallPilot Manager and CallPilot Reporter software

ATTENTION

This procedure applies only if you are installing CallPilot Manager and CallPilot Reporter on a stand-alone web server. No action is required on the CallPilot server.

1. Insert the CallPilot 2.02 Server Software CD-ROM or the PEP CD-ROM into the CD-ROM drive.
2. Click Start → Run.

   Result: The Run dialog box opens.
3. Click Browse.

   Result: The Browse dialog box opens.
4. Do one of the following:

IF you are using the	THEN
Server Software CD-ROM	navigate to the root folder on the CD-ROM drive (Z:).
PEP CD-ROM	navigate to the CallPilotManagerInstall folder on the CD-ROM drive (Z:).

5 Double-click the cpmgrsetup.exe file, and then click OK.

Note: If file name extensions are not visible, click View → Details to make them visible.

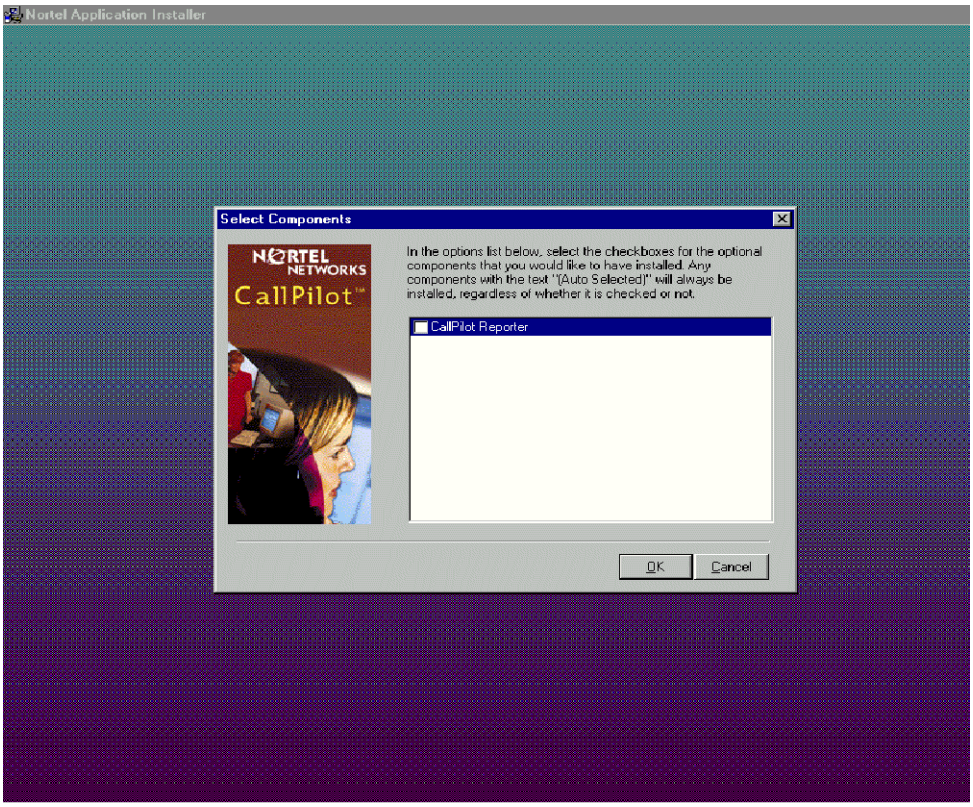
ATTENTION

Do not confuse the cpmgrsetup.exe file with the cpmgr.exe file, which also resides in the root folder on the Server Software CD-ROM.

If you execute the cpmgr.exe file, the program terminates immediately without installing anything. You receive an error message that cpmgr.exe cannot be executed without the appropriate data file.

The cpmgr.exe file is executed automatically by the cpmgrsetup.exe file. It cannot be run on its own.

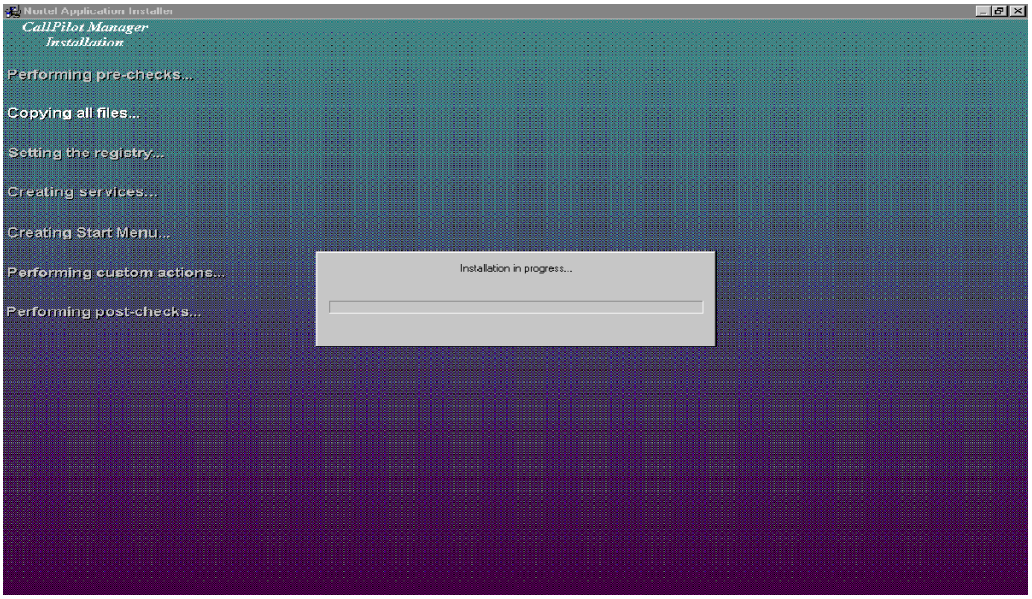
Result: You are asked to select the options to install. CallPilot Reporter is the only option listed.



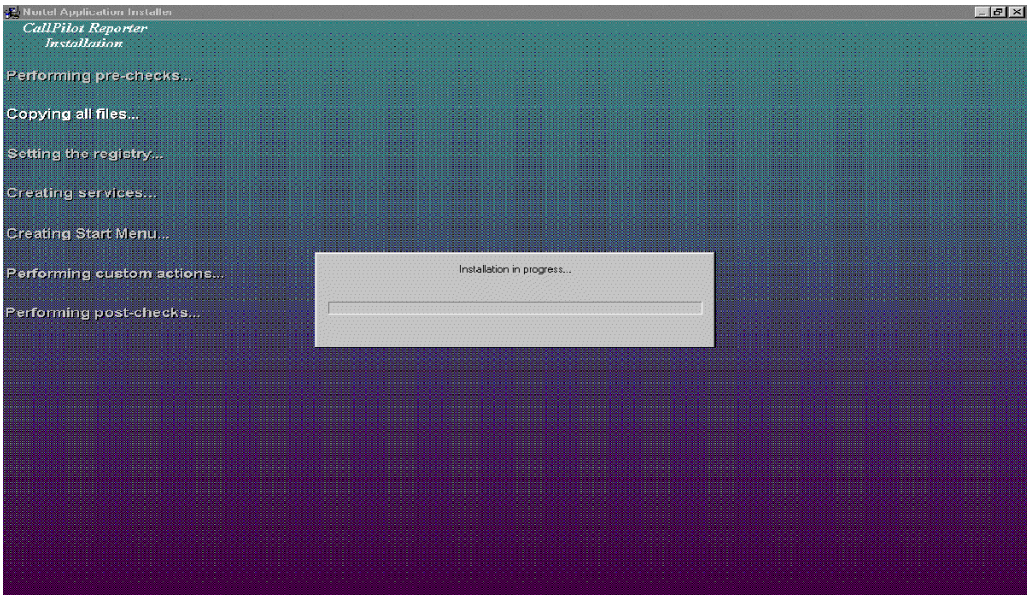
6 If you want to install CallPilot Reporter, click its check box, and then click OK.

Result: CallPilot Manager installation begins. During the installation, the Application Installer

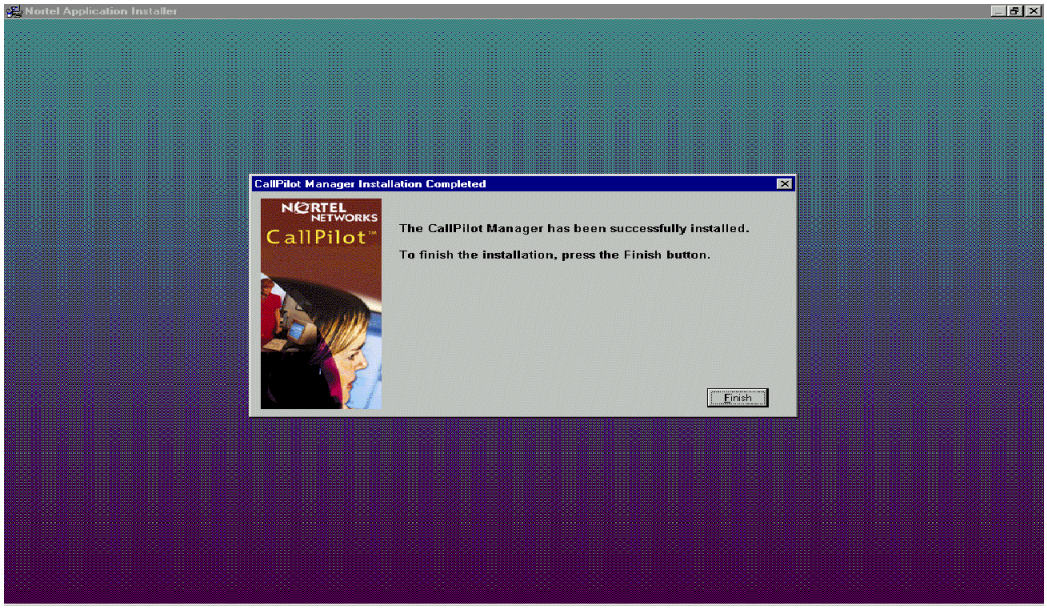
- displays a progress bar that indicates the percentage that is completed
- highlights each item on the splash screen as it is processed



When CallPilot Manager installation is finished, the Application Installer automatically begins to install the CallPilot Reporter software, if you chose to install it. (The screen title changes to reflect this.)



When the CallPilot Reporter software installation is finished, the following dialog box appears:



7 Click Finish.

Result: The Application Installer closes.

What's next?

Test connectivity to the CallPilot server by logging on to the CallPilot server. For instructions, see "Phase 5: Logging on to the CallPilot server with CallPilot Manager" on page 88.

Appendix A

Reference information

In this appendix

Connecting MPB16-4 boards to MGate cards 124
About event log files 131
Verifying that Microsoft hot fixes have been installed 132
Acquiring Service Updates and PEPs 134

Connecting MPB16-4 boards to MGate cards

Introduction

This section describes the MPB16-4 board and MGate card connection scenarios that the CallPilot server supports. You must ensure that the DS30X cable(s) used by the server are correctly connected.

Cabling diagrams

The following table lists the supported configurations and the page number that illustrates the configuration:

Number of channels	Number of MPB16-4 boards	Number of MGate cards	See
32 or less	1	1	page 125
32 or less	2	1	page 126
48 or less	1	2	page 127
64 or less	2	2	page 128
96 or less	2	3	page 129

Identifying the location of MPB #1 and MPB #2

In the cabling diagrams, the terms MPB16-4 #1 and MPB16-4 #2 are used to identify the MPB16-4 boards. The following table indicates the location of these boards:

MPB #	Slot number in		
	702t server	1001rp server	1002rp server
MPB16-4 #1[a]	slot 2	slot 12	slot 11
MPB16-4 #2	slot 3	slot 13	slot 12

a. For the 702t server, slots are numbered from the bottom of the server to the top. For the 1001rp and 1002rp servers, MPB16-4 #1 is the MPB16-4 board that is located closest to the SBC card. For more information on slot assignments, refer to the slot assignment tables in Part 2 of the *CallPilot Installation and Configuration* binder.

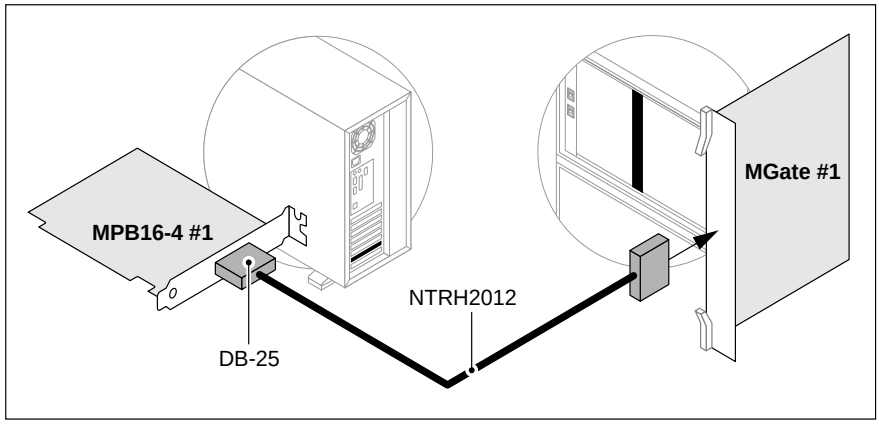
Identifying the location of MGate #1, #2, and #3

In the cabling diagrams, the terms MGate #1, MGate #2, and MGate #3 identify the MGate cards. MGate #1 is in the lowest-numbered slot in the Meridian 1 switch or Succession 1000 system. MGate #2 and MGate #3 are in the next available higher slots.

One MPB16-4 board and one MGate card (32 channels or less)

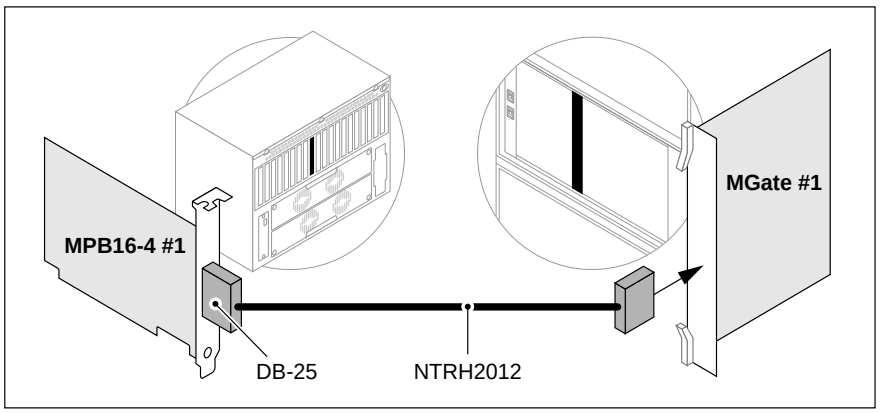
Use the single DS30X cable (NTRH2012) to connect the MPB16-4 board to the MGate card.

MGate cabling for the 702t server



G101724

MGate cabling for the 1001rp or 1002rp server



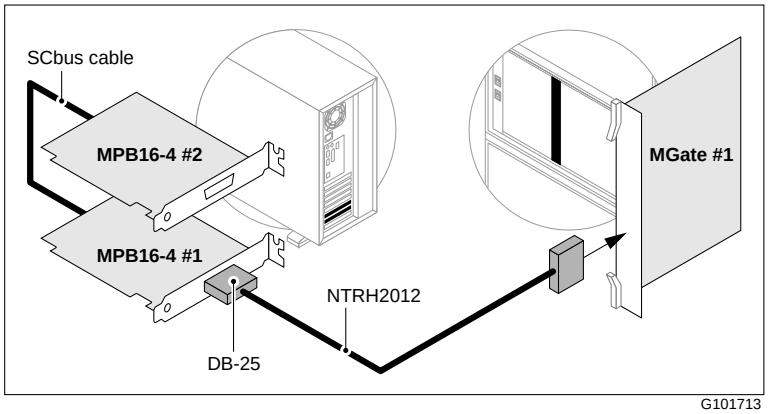
G101716

Two MPB16-4 boards and one MGate card (32 channels or less)

Use the single DS30X cable (NTRH2012) to connect MPB16-4 #1 to the MGate card.

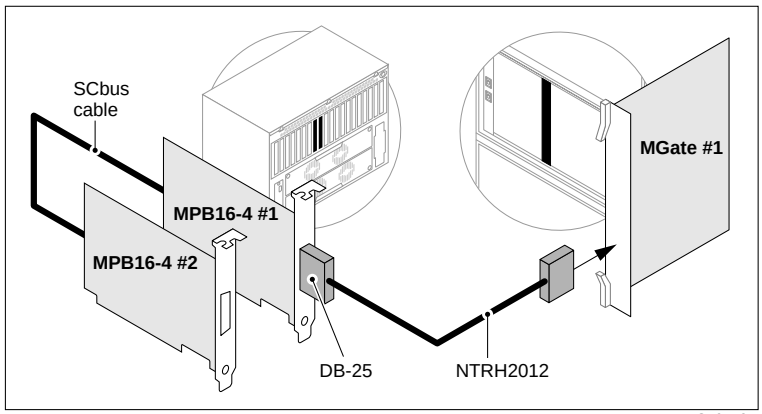
Note: The MPB number is identified during system startup. Therefore, you must connect the DS30X cable to the MPB assigned the lower bus number by the software.

MGate cabling for the 702t server



G101713

MGate cabling for the 1001rp or 1002rp server



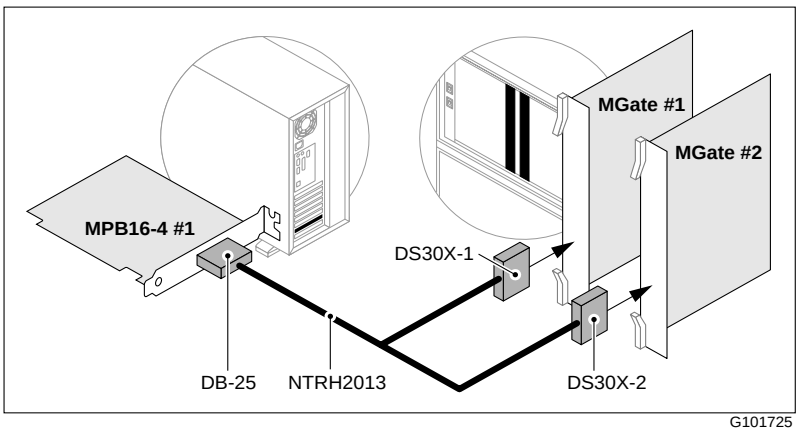
G101721

One MPB16-4 board and two MGate cards (48 channels or less)

Use the dual DS30X cable (NTRH2013) cable, as shown in the diagrams that follow. Ensure that

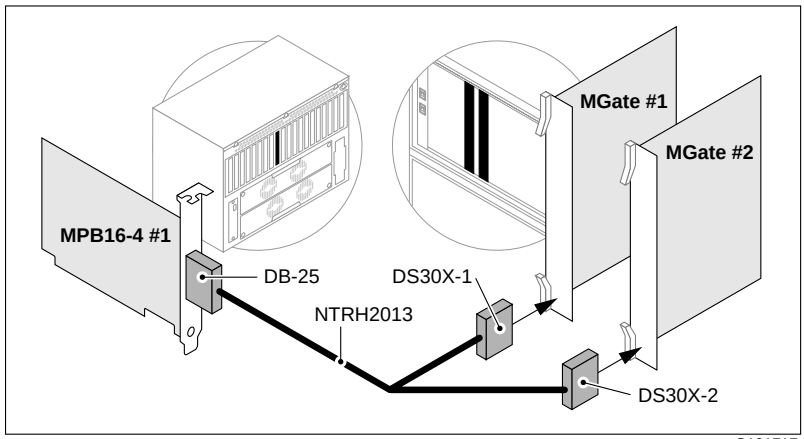
- the connector labeled DS30X-1 is connected to MGate #1
- the connector labeled DS30X-2 is connected to MGate #2

MGate cabling for the 702t server



G101725

MGate cabling for the 1001rp or 1002rp server



G101717

Two MPB16-4 boards and two MGate cards (64 channels or less)

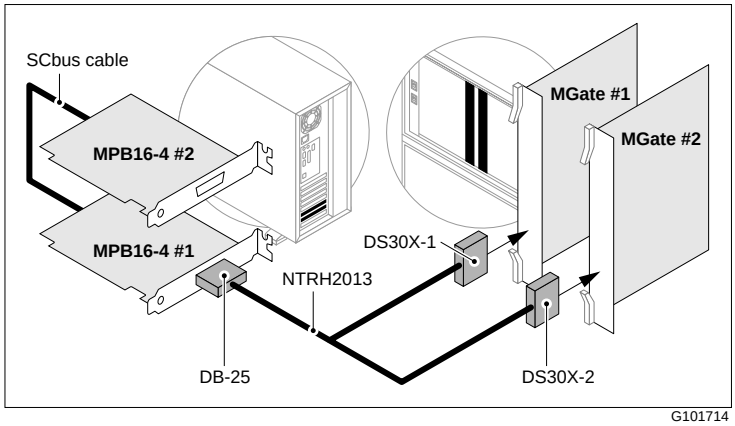
ATTENTION

Due to CPU limitations on the Succession 1000 system, only 48 CallPilot multimedia channels can be supported when CallPilot is connected to a Succession 1000 system.

Use the dual DS30X cable (NTRH2013) cable, as shown below. Ensure that

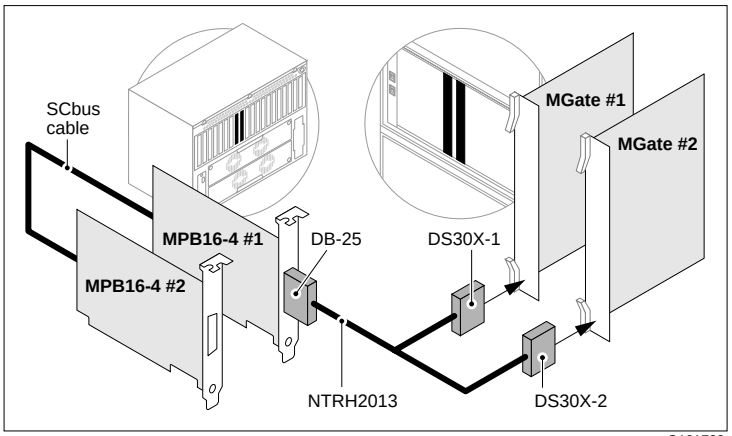
- the connector labeled DS30X-1 is connected to MGate #1
- the connector labeled DS30X-2 is connected to MGate #2

MGate cabling for the 702t server



G101714

MGate cabling for the 1001rp or 1002rp server



G101722

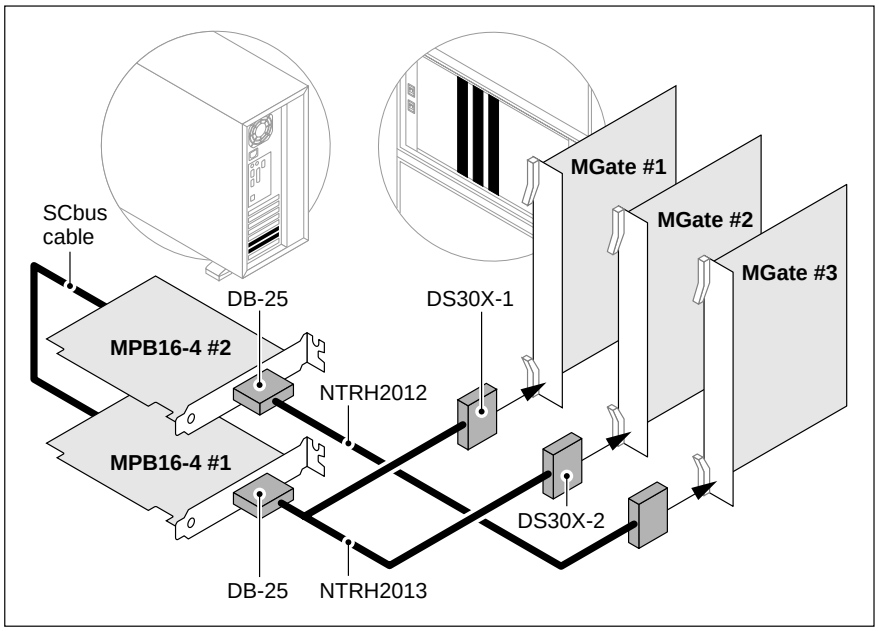
Two MPB16-4 boards and three MGate cards (96 channels or less)

Connect MPB16-4 #1 to MGate card #1 and #2 with the dual DS30X cable (NTRH2013). Ensure that

- the connector labeled DS30X-1 is connected to MGate #1
- the connector labeled DS30X-2 is connected to MGate #2

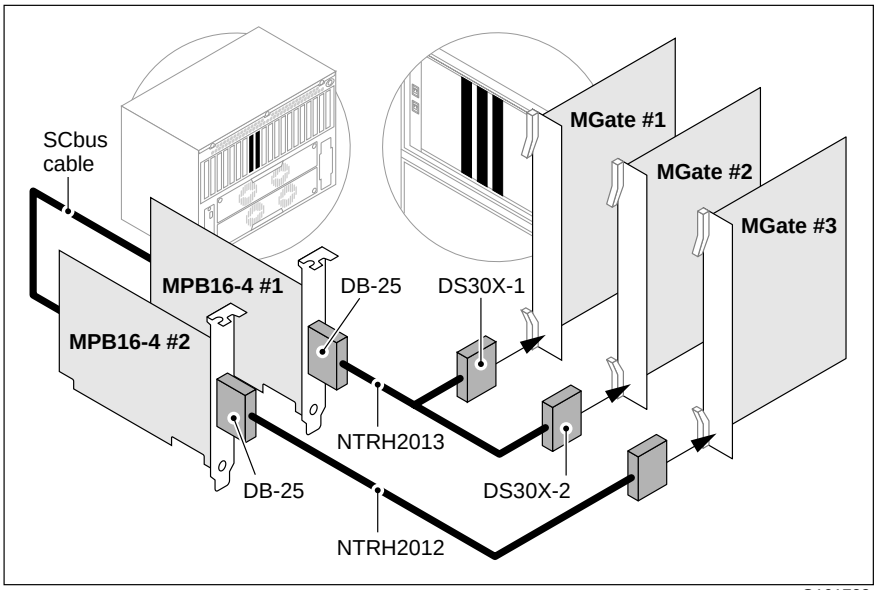
Connect MPB16-4 #2 to MGate card #3 with a single DS30X cable (NTRH2012).

MGate cabling for the 702t server



G101715

MGate cabling for the 1001rp or 1002rp server



G101723

About event log files

Introduction

This section describes the event log files that are provided by CallPilot.

Software maintenance event log file

The log files for CallPilot server software and CallPilot Manager software maintenance track the activities associated with any install, reinstall, upgrade, or uninstallation operation. The log files also track any fatal errors that interrupt these operations.

To review the log files, use any text editor, such as Notepad. The files are located on the server as follows:

Software component log	Location
CallPilot server software	C:\CallPilot\CallPilot20.log
CallPilot Manager software	C:\CallPilot\CPManager.log
CallPilot operating system	C:\OSSetup.log or D:\OSSetup.log (if the operating system is on drive D:\)

Configuration Wizard log file

When an error occurs during configuration, an event or return code is recorded in the Configuration Wizard log file. To view the Configuration Wizard log file, use any text editor, such as Notepad. The file is located on the server in D:\Nortel\bin\Configwizard.log.

If you can log on to the CallPilot server with CallPilot Manager, you can refer to the Event Code online Help in CallPilot Manager for an interpretation of the event and return codes. If you are not able to log on to the CallPilot server with CallPilot Manager, contact your Nortel Networks technical support representative.

Verifying that Microsoft hot fixes have been installed

Introduction

If an error message appeared after hot fixes were installed during the Windows NT update, use the procedure in this section to verify that all of the hot fixes were installed.

Microsoft hot fix verification tools

Hfnetchk is a Microsoft tool that is provided by Nortel Networks on the CallPilot 2.02 OS Recovery or OS Upgrade CD-ROM. Mssecure.xml is a data tool used by hfnetchk to determine which hot fixes are available. To run hfnetchk, see "To verify that all hot fixes were installed" below.

CAUTION

Risk of system interruption or malfunction

Do not download and install any Windows NT security patches from the Microsoft web site unless they have been approved for CallPilot by Nortel Networks. Installation of unapproved security patches can result in incorrect operation of your CallPilot system.

To determine which Windows NT security patches have been approved by Nortel Networks, refer to the latest issue of the *CallPilot 2.02 General Release Bulletin*.

To verify that all hot fixes were installed

Note: Ensure that the CallPilot server has completed the start cycle. An error appears if the server is still starting when you run the hfnetchk tool.

1. Log on to Windows NT.
2. Double-click the FixCheck.bat file in the root folder of the CallPilot 2.02 OS Recovery CD-ROM or CallPilot 2.02 OS Upgrade CD-ROM.

   Result: Results appear on the screen.

IF Patch Not Found	THEN
does not appear	all of the required hot fixes are present on the CallPilot server.

IF Patch Not Found	THEN
appears	hot fixes are required on the CallPilot server, but they are missing. **Note:** It is normal for patch MS02-071 to be shown as Not Found, and for a warning to be shown for patch MS02-013. Do the following: **a.** Review the Z:\HotFixes\FixInfo.txt file for information about each hot fix. **b.** Locate the .exe file for the missing hot fix in the Z:\HotFixes folder, and then double-click it to install it. **c.** Restart the server if the system prompts you to do so.

Acquiring Service Updates and PEPs

About Service Updates

A Service Update (SU) is a consolidation of all of the PEPs that have been released since CallPilot 2.02 became available. A particular SU may contain product improvement PEPs, software fix PEPs, or both.

Each time you install an SU, the previous SU is automatically uninstalled. The current SU includes all of the PEPs that were released in previous SUs.

If you download an SU, run it to extract all folders and files into the Temp folder on the server's hard drive.

Identifying Service Updates and PEPs

Service Updates and PEPs on the PEP CD-ROM are labeled in the following format: CPxxxxxxxyyz or CMxxxxxxxyyz, where

CP	CallPilot
CM	CallPilot Manager
xxxxxxx	is the release level (for example, 20123SU)
yy	is the PEP number for the release, which can range from 001 to 999
z	identifies the component to which the PEP applies: A: administration software update D: desktop messaging software update L: language update S: server software update W: web messaging software update

How to acquire new PEPs

CallPilot PEPs are provided on the CallPilot 2.02 PEP CD-ROM. Additional PEPs, when they become available, are provided in the form of Service Updates (SUs), or as downloadable files from the Nortel Networks web site, as follows:

PEP availability format	How to acquire it
SU CD-ROM kit (NTZE60AC or NTZE60BA)	You can order the SU CD-ROM kit from Nortel Networks. There is no charge for the kit. **Note:** To determine which kit you should order, contact your Nortel Networks sales representative.
Downloadable SU or PEP files from Nortel Networks	Access the Nortel Networks Meridian PEP Library (MPL) at one of the following URLs: ■ North America: https://www43.nortelnetworks.com/MPL ■ Europe, Middle East, and Africa: https://www21.nortelnetworks.com/MPL and then navigate to the “Multimedia PEP Tools” section. **Notes:** ■ If you cannot access the Meridian PEP Library, or if you cannot find the SUs, then contact your Nortel Networks representative. ■ The Meridian PEP Library is a secure web site and requires a user name and a password to log on. If you do not currently have an account, you must apply for one. It can take up to 72 hours to process your account request.

Readme files

Readme files are provided in the following locations on the SU CD-ROM or in the PEP, as follows:

- in the root directory on the SU CD-ROM

  This readme file provides a general description of the PEP packages and general install and uninstall instructions.
- in each PEP package folder

  These readme files provide a list of all the PEPs in that package, and specific install and uninstall instructions.
- in each PEP folder

  These readme files describe the purpose of the PEP and may provide some installation instructions.

Before you install PEPs

CAUTION

Risk of system problems

For specific SU or PEP installation instructions, refer to the readme files that are provided with the SU or PEP. In many cases, PEPs must be uninstalled and installed in a specific order. The readme files provide these instructions. When the readme files instruct you to uninstall or install PEPs, refer to the procedures in this section.

ATTENTION

If your CallPilot system is up and running, Nortel Networks recommends that you do the following:

1 Perform a system backup.

2 Take CallPilot out of service by disabling all call channels.

For instructions, refer to the *CallPilot Administrator's Guide* (NTP 555-7101-301).

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