

P0910112

Nortel Networks Symposium Call Center Server

Software Installation and Upgrade Guide

Product release 3.0

Standard 1.0

April 2000

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P0910112

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Chapter 1

Getting started

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Overview

Introduction

The *Symposium Call Center Server Software Installation and Upgrade Guide* provides step-by-step instructions for all of the procedures you must perform to complete an installation of, or perform an upgrade on, the Symposium Call Center Server client and server applications.

This guide also provides procedures for the following software maintenance activities:

- installing software Performance Enhancement Packages (PEPs)
- uninstalling the software
- reinstalling the software
- migrating to a different platform

This chapter introduces the Symposium Call Center Server and describes how the call center components interact with each other. This chapter also provides an overview of procedures you can follow for installing and upgrading your Nortel Networks Symposium Call Center Server.

Before you begin

To ensure that you have all of the information you need to complete the procedures in this guide, before you begin the installation, complete the checklists and worksheets in Chapter 2, “Worksheets and checklists.”

Check for any Installation Addendums

Before performing an installation, upgrade, or conversion, check for any Installation Addendums on your regional Symposium Call Center Server technical website. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic.

Who should read this guide

This guide is intended for Nortel Networks installers and distributors who are responsible for installing or upgrading the Symposium Call Center Server.

Assumptions

This guide assumes the following:

- You are preparing to install a new Symposium Call Center Server, or you are planning to upgrade or make changes to an existing installation.
- Your hardware platform is installed and operational. If the platform has been installed but is not operational, refer to the *Meridian Application Server Installation and Maintenance Guide* for your hardware platform to troubleshoot your system.
- The switch is correctly installed, operational, and configured for use with Symposium Call Center Server.
- All client PCs are operational and running one of the following versions of Windows:
 - Microsoft Windows 95, with the Service Pack supplied by Microsoft
 - Microsoft Windows 95 version 4.00.950B or higher (OSR2)
 - Microsoft Windows 98
 - Windows NT 4.0 Workstation with Service Pack 3 or higher
- All client PCs are using Microsoft TCP/IP.
- The client local area network (CLAN) and the embedded local area network (ELAN) are installed and operational.

Access rights

This guide assumes that you have the privileges and access rights required to perform the procedures in this guide. For more information, refer to the *Nortel Networks Symposium Call Center Server Call Center Administrator's Guide*.

Optional features

Some of the features described in this guide are optional. To give you access to features, Nortel Networks supplies a special code called a keycode, which you use when you install the Symposium Call Center Server software. Fields and commands for features that you did not purchase are not available.

Related documents

If you need information about	refer to
<ul style="list-style-type: none">■ hardware maintenance, diagnostics, and troubleshooting■ migrating to another hardware platform	the <i>Nortel Networks Meridian Application Server Installation and Maintenance Guide</i> for your hardware platform
<ul style="list-style-type: none">■ software maintenance, backing up and restoring Symposium Call Center Server data, and controlling the server from a remote PC	the <i>Nortel Networks Symposium Call Center Server Administrator's Guide</i>
<ul style="list-style-type: none">■ upgrading from Symposium Call Center Server Release 1.0 to Release 1.5	the document <i>Nortel Networks Symposium Call Center Server Upgrade Instructions from Release 1.0 to Release 1.5</i> , which accompanies the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0

About the Symposium Call Center Server

What is the Symposium Call Center Server?

The Symposium Call Center Server provides a call center solution for varied and changing business requirements by offering a suite of applications that includes

- call processing
- agent handling
- management and reporting
- networking (for Meridian 1 systems only)
- third-party application interfaces

The Symposium Call Center Server uses a client/server architecture, which distributes call routing and management capabilities among processors to make the best use of system resources.

The components of the Symposium Call Center Server

The Symposium Call Center Server uses a client/server architecture, with functionality distributed among various components. The major components of the Symposium Call Center Server include the following:

- **The server PC**—Responsible for functions such as the logic for call processing, call treatment, call handling, call presentation, and the accumulation of data into historical and real-time databases. This PC runs under Microsoft Windows NT Server 4.0.
- **The client PCs**—A graphical user interface to the server. Client PCs run the Symposium Call Center Server client application. They are used to administer the server and to monitor call center performance. You can connect client PCs to either the embedded LAN (ELAN) or customer LAN (CLAN). Nortel Networks recommends connecting to the ELAN as this is more predictable and less susceptible to fluctuations resulting from data bursts in CLAN traffic.
- **The switch**—Provides telephony services and voice network connectivity.

- **Front-end IVR system**—(Optional) Provides voice processing capabilities.
- **Third-party applications**—(Optional) Use information from the server to provide information on screens (“screen pops”) or produce customized reports.

Installation steps overview and timing

Introduction

This section provides an overview of the procedures that you must follow, in the order shown, to complete the server and client installations. Each chapter also provides a detailed checklist of the steps to complete in that chapter.

Timing

The server and client installation takes approximately 4 hours and 30 minutes to complete for one server and one client. This does not include time required for preinstallation planning, switch configuration, or post-installation setup and configuration, such as adding agents or configuring agent to skillset assignments.

Installation steps overview

Steps	✓
1 Ensure that the switch has been properly configured. Refer to your switch documentation for instructions.	
2 Complete the worksheets in Chapter 2, "Worksheets and checklists."	
3 Configure Windows NT. Follow the instructions in Chapter 3, "Configuring Windows NT 4.0 server." Time to complete: approximately 30 minutes	
4 Configure pcANYWHERE32 8.02 on the server. Follow the instructions in Chapter 4, "Preparing the server for remote access." Time to complete: approximately 10 minutes	
5 Install the server software. Follow the instructions in Chapter 5, "Installing the server software." Time to complete: approximately three hours	
6 Install the client software. Follow the instructions in Chapter 6, "Installing the client software." Time to complete: approximately 30 minutes	
7 Add an SMI system. Follow the instructions in Chapter 7, "Adding a System Management Interface system." Time to complete: approximately 10 minutes	
8 Return to the server computer to complete the server installation. Follow the instructions in "Installing the server software" on page 96. Time to complete: approximately 10 minutes	
9 Install any PEPs from the PEP CD.	
10 Create a Platform Recovery disk (see "Installing the server software" on page 96).	
11 Create a database backup (see the <i>Administrator's Guide</i> .)	
12 Optionally, install the Symposium Call Center Server client on additional PCs as required.	

Chapter 2

Worksheets and checklists

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Overview

Information and worksheet

A fold-out worksheet is attached inside the front cover. Make photocopies of this worksheet and use it to record information required for the software installation.

Use the tables in this chapter to supplement the attached worksheet. These tables provide some additional details and tips, such as computer name and switch name restrictions. Review the tables before filling out the worksheet.

If you prefer to use the tables to gather information, make photocopies of these tables. The tables in this chapter organize the planning information according to when it is needed during the software installation.

Requirements

Review the sections “Customer-supplied equipment and data checklist” on page 18 and “Installation software checklist” on page 21 to ensure that you have everything you need to begin the software installation.

Where to get the information

Sources of information for the worksheets include the customer’s LAN, network, or system administrator, and the Symposium Call Center Server administrator.

Installing a network of servers (for Meridian 1 only)

If you are installing a network of servers, ensure that you plan the server installation information for all servers. Refer to the *Nortel Networks Symposium Call Center Server Network Control Center Administrator’s Guide* for networking requirements and planning information.

Switch information

Introduction

Use the table appropriate to your switch type (Meridian 1 or DMS/MSL-100).

Restrictions for switch names

The following restrictions apply to switch names:

- Valid characters for switch names are A–Z, a–z, 0–9, _ (underscore), and . (period).
- Switch names must begin with an alphabetic character and cannot contain spaces.
- The last character must not be an underscore or a period.
- Switch names must not exceed 80 characters in length.

Meridian 1 switch information

During software installation, you need the information specified in the following table:

Item	Fill in the required information
Switch name	
Switch customer number	
Switch ELAN primary IP address (for example, 255.255.255.255)	
Switch ELAN secondary IP address (for example, 255.155.155.237)	

Notes:

- If you enter an incorrect value during installation, you can use the Feature Report utility (see “Feature Report: Switch Information” on page 269) to correct the value after installation.
- Switches with two processors require two IP addresses. Use the switch primary address for the primary CPU (core 0), and use the secondary address for the redundant CPU (core 1). For smaller switches, such as an Option 11C, you need only the primary address.

DMS/MSL-100 switch information

During software installation, you need the information specified in the following table:

Item	Fill in the required information
Switch name	
Switch customer number	
Switch IP address (for example, 255.255.255.255)	
IP addresses for routers on the ICM connection between the switch and ELAN Note: Record additional IP addresses on the back of the network planner worksheet.	
Network node ID	
Service ID	
Application ID	
Service version	
Business group	
Link set name	
Password	
Remote host IP address (optional)	

Notes:

- If you enter an incorrect value during installation, you can use the Feature Report utility (see “Feature Report: Switch Information” on page 269) to correct the value after installation.
- If an IP addressing scheme has not yet been established for the ICM connection, see your network administrator.

Windows NT configuration information

Introduction

Complete the following table to record general Windows NT information. Complete the table on the next page to record IP addresses. It is the customer's responsibility to provide unique and usable IP addresses.

General information

Required setup data	Fill in the required information
New password for Administrator account (You are instructed to provide a new password.)	For security reasons, do not record the password here. See "Changing the Administrator password" on page 32 for password guidelines.
Computer name <ul style="list-style-type: none"> ■ no spaces; 6 to 15 characters in length ■ letters, numbers, hyphen, and dash are allowed ■ must be unique on the network 	
DNS Host Name (must be exactly the same as the Computer name, including uppercase and lowercase)	
Workgroup name	
Type of modem installed in the server	
Modem phone number for the switch (for dial-up connections only)	

ELAN and CLAN IP addresses and names

CLAN and ELAN IP addresses must be unique. Contact the customer's LAN administrator for IP addresses, subnet masks, and gateways.

Name	IP address	Subnet mask	Gateway, description, equipment name, or comments
ELAN server			
ELAN router/ gateway (optional WAN connection)			
CLAN server			
CLAN router/ gateway (if used)			
RAS 1 (minimum 2 RAS addresses)			
RAS 2 (if applicable)			

Server and client software installation information

Required setup data	Fill in the required information
Customer name	
Company name	
Keycode and serial number. This can be on a disk; if so, indicate “on disk.” For DMS/MSL-100, the serial number is contained in the dongle.	
Switch information (See “Switch information” on page 11.)	
ELAN and CLAN IP addresses Note: ELAN and CLAN addresses must be unique.	
Site name. This name can consist of up to 21 characters, except the \ (backslash) character. In a multi-site network, the site name for each server must be unique. The application uses this name to identify the server in reports. Note: For M1 switches with the option Network Skill-based Routing feature, the NCC site name is automatically propagated to servers.	
New password for NGenDesign account (This is a user account for Nortel Networks support.)	For security reasons, do not record the password here. See “Changing the Administrator password” on page 32 for password guidelines.

Required setup data	Fill in the required information
New password for NGenDist account (This is a user account for distributors to provide support.)	For security reasons, do not record the password here. See “Changing the Administrator password” on page 32 for password guidelines.
Modem phone number for the server (for dial-up connections from the client PC)	

Customer-supplied equipment and data checklist

Introduction

Use this checklist to ensure that you have the required equipment and information to be supplied by the customer.

Description	✓
<p>Client PC hardware</p> <p>Each client PC running the Symposium Call Center Server client application has the following:</p> <ul style="list-style-type: none"> ■ Intel Pentium 90 MHz (or faster) CPU ■ RAM <ul style="list-style-type: none"> ■ at least 32 Mbytes for Windows 95/98 ■ at least 40 Mbytes for Windows NT ■ at least 1 Gbyte of hard disk space free ■ 1.44 Mbyte floppy drive ■ VGA color monitor ■ keyboard ■ Microsoft-compatible mouse ■ Network interface card (Token Ring or Ethernet)—up to two cards are supported ■ CLAN connection running Microsoft TCP/IP ■ 4-speed or higher CD-ROM ■ (optional) parallel printer port ■ (optional) serial port (16550 UART) 	

Description	✓
<p>Client PC software</p> <p>PCs up and running with one of the following installed:</p> <ul style="list-style-type: none"> ■ Windows 95 with the required Microsoft Service Pack ■ Windows 95 version 4.00.950B or higher (OSR2) ■ Windows 98 ■ Windows NT 4.0 Workstation (Service Pack 3 or greater) 	
<p>Ethernet connections ready at the switch (cable and transceiver/Multistation Access Unit)</p>	
<p>Customer-supplied hub for the ELAN</p>	
<p>Customer-supplied UPS for the server</p>	
<p>Jacks and cable ready to connect the server to the CLAN</p>	
<p>(Optional) cable ready to connect the ELAN to the customer WAN</p>	
<p>Modem, power cable, and serial cable</p>	
<p>A list of unique names and IP addresses for all equipment on both the CLAN and ELAN (See “Switch information” on page 11 and “Windows NT configuration information” on page 14.)</p>	
<p>Use the Capacity Assessment Tool to analyze customer LAN bandwidth.</p> <p>Existing average bandwidth utilization = _____%</p>	

Note: This worksheet indicates the minimum required hardware for the client. If you are generating large reports on the client PC, a faster processor and increased memory improve performance.

Hardware upgrades

If you are upgrading Symposium Call Center Server software, make sure your server PC has at least 256 Mbytes of memory. This is the minimum memory requirement for operating Symposium Call Center Server Release 3.0. For more information on hardware and software requirements, refer to the *Nortel Networks Symposium Call Center Server Planning and Engineering Guide*.

Note: If you are using the Standard version of the 701t or 702t platform, you must upgrade the server hardware to the Enhanced version prior to upgrade. Symposium Call Center Server Release 3.0 does not support the Standard version.

Installation software checklist

Qty	Description	✓
1	Nortel Networks Symposium Call Center Server Release 3.0 Operating System CD-ROM Version 1.0 Note: If you are using a different version of the CD, refer to your Release Notes or Documentation Addendum.	
1	Nortel Networks Symposium Call Center Server Release 3.0 Server Application CD-ROM	
1	Nortel Networks Symposium Call Center Server Release 3.0 Client Application CD-ROM	
	Nortel Networks Symposium Call Center Server Supplementary CD-ROM (optional). If supplied with this installation, this CD contains product enhancement files.	
1	Documentation CD. This CD contains all Symposium Call Center Server documents in PDF format.	
1	The emergency repair disk that holds the configuration data for Windows NT. The installer updates this disk during each stage of the Symposium Call Center Server installation on the server.	
1	Capacity Assessment Tool (CapTool) disks (3). This is the capacity planning software.	
1	Keycode data. This data governs what software features you install. This data is usually contained on a disk. However, if you do not have the disk but know your keycode data, you can enter the information manually during the installation.	

Maintenance and diagnostics items

Qty	Description	✓
1 set	Microsoft DOS 6.20 disks. You use these disks to reinstall the operating system in case of a hardware failure.	
1 set	Intel PCDIAGS disks. You use these disks for maintenance and diagnostics.	
1 set	Driver disks for LAN cards, SCU utility	
1 set	(Optional) RAID driver disk and configuration disk	

Chapter 3

Configuring Windows NT 4.0 server

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Overview

Introduction

This chapter contains the procedures for configuring Windows NT. You must complete these steps before installing the Symposium Call Center Server software.

Checklist for configuring Windows NT

Step	✓
Ensure that you have completed the checklists and worksheets in Chapter 2, "Worksheets and checklists."	
Complete the tasks in "Preparing for installation" on page 26.	
Identify your TZ system variable. See page 28.	
Log on to Windows NT as Administrator. See page 31.	
Change the Administrator password. See page 32.	
Verify that Service Pack 3 is installed. See page 35.	
Apply the Microsoft hot fix. See page 36.	
Verify that Remote Access Service (RAS) and (optionally) SNMP are installed. See page 37.	
Verify that the RAS service is set to automatic. See page 39.	
Check the virtual memory settings. See page 40.	
Set the date, time, and time zone. See page 41.	
Set the TZ system variable. See page 42.	
Change the computer and workgroup names. See page 44.	
Configure TCP/IP for the ELAN, CLAN, and RAS. See page 49.	
Configure the modem for RAS. See page 60.	
Format optional disk drives. See page 66.	
Update the emergency repair disk. See page 68.	
Test the network connection. See page 70.	

Preparing for installation

Items to verify

	✓
Verify all of the IP addresses and host names. All of the IP addresses and host names must be unique on the network. See “Windows NT configuration information” on page 14.	
Ensure that the Windows NT computer name and TCP/IP DNS host name that you intend to assign are identical, including uppercase and lowercase letters.	
Meridian 1 checks	
Ensure that the switch host name, IP name, and net mask are the same as those found with the STAT ELNK command in LD 137.	
Ensure that the switch serial number matches the one delivered with the Symposium Call Center Server keycode. The serial number must match exactly, including uppercase and lowercase letters.	
DMS/MSL-100 checks	
Ensure that the security keylock device (the “dongle”) is attached to the server. Note: The dongle is not required for installation, but without it the server cannot communicate with the switch.	
Ensure that the dongle (security keylock device) serial number matches the one delivered with the Symposium Call Center Server keycodes. The serial number must match exactly, including uppercase and lowercase letters.	

Requirements

A mouse, monitor, and keyboard must be connected to the server.

Note: If reconfiguration is required at a later time, you can do the reconfiguration through a local or remote pcANYWHERE32 session.

About server restarts

You might be asked several times during Windows NT configuration if you want to restart the server. You must restart the server to activate some Windows NT configuration changes. You need not restart the system each time you are prompted. You only need to restart it once, after all of the Windows NT configuration tasks are completed.



CAUTION

Risk of file corruption

Do not press the power button on the front of the server to shut down your system. If possible, perform the system shutdown described in “Shutting down and restarting the server” on page 72.

Identifying the TZ system variable value

Introduction

Certain Symposium Call Center Server functions use a system variable called TZ that corresponds to the time zone in which the server is installed.

Identify the TZ value from the “Sample TZ values” on page 29, or use the “TZ value formula” on page 29 if necessary. You need the TZ value later in this chapter when you define the time zone.

Example

The TZ value for Eastern Standard Time for the United States and Canada, with Daylight Saving Time, is: **EST5EDT**

where

- EST = Eastern Standard Time
- 5 = a 5-hour offset from Greenwich Mean Time (GMT)
- EDT = Eastern Daylight Time, used for daylight savings in this zone

Sample TZ values

Hour	TZN	DZN	Zone	TZ Value
-4	AST	ADT	Atlantic Standard Time	AST4ADT
-5	EST	EDT	Eastern Standard Time	EST5EDT
-6	CST	CDT	Central Standard Time	CST6CDT
-7	MST	MDT	Mountain Standard Time	MST7MDT
-8	PST	PDT	Pacific Standard Time	PST8PDT
-10	HST	HDT	Hawaiian Standard Time	HST10HDT
9	JST		Japan Standard Time	JST-9
9	KST		Korean Standard Time	KST-9
8	CCT		China Coast Time	CCT-8
8	HKT		Hong Kong Time	HKT-8
8	SST		Singapore Standard Time	SST-8
2	EET		Eastern Europe Time	EET-2
1	MEZ	MES	Middle European Time	MEZ-1MES

TZ value formula

The formula for the TZ value is

$$TZ=tzn[+/-]hh[:mm[:ss]][dzn]$$

where

- *tzn* is the three-letter time zone name (for example, EST for Eastern Standard Time)
- *hh* is the offset that you must add to the local time to get Universal Coordinated Time (UTC)
- *mm* is the minutes. If used, separate from *hh* by a colon (:).
- *ss* is the seconds. If used, separate from *hh* by a colon (:).

- *dzn* is the three-letter Daylight Saving Time zone (for example, EDT for Eastern Daylight Time). If Daylight Saving Time is never used in the local time zone, do not enter a value for *dzn*.

Logging on to Windows NT as Administrator

To log on as Administrator

ATTENTION

When logging on to Windows NT, ensure that the Caps key is not locked. The password is case-sensitive.

- 1 Ensure that the server has started and the Windows NT logon prompt is displayed.



- 2 Press Ctrl-Alt-Delete.

Result: The logon dialog box appears.



- 3 Type **Administrator** as the user name.
- 4 Type **abc123** as the password.
- 5 Click OK.

What's next?

Continue with "Changing the Administrator password" on page 32.

Changing the Administrator password

Purpose

To ensure server security, change the default Administrator password as soon as possible.

Password recommendations

Nortel Networks recommends that your password meet the following requirements:

- The password should be six to ten characters long.
- The password should contain at least one number, and one symbol or punctuation character.
- The password should not contain common words or nouns.

Example

The following password example meets all of these recommendations:
xyd45fst

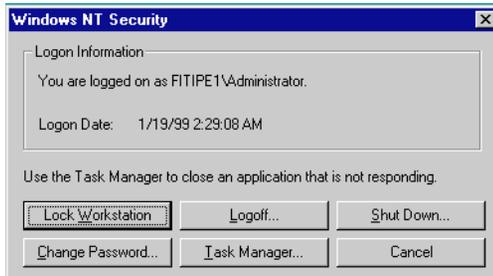
Password security

Write down the new Administrator password that you create, and store it in a safe, secure place away from the server. Give the Administrator password to only those who need it.

To change the Administrator password

- 1 Log on to Windows NT as Administrator.
- 2 Press Ctrl-Alt-Delete.

Result: The Windows NT Security dialog box appears.



- 3 Click Change Password.

Result: The Change Password dialog box appears.



- 4 Enter the current password in the Old Password box.
- 5 Enter the new password in the New Password box and in the Confirm New Password box.

Note: Ensure that the password meets the recommendations described earlier in "Password recommendations" on page 32.

- 6 Click OK.

Result: A dialog box appears indicating that the password has been successfully changed.

- 7 Click OK.

Result: You return to the Windows NT Security dialog box.

- 8** Click Cancel to close the Windows NT Security dialog box.
- 9** Record the password and store it in a safe, secure place away from the server.

Configuring and verifying Windows NT settings

Introduction

All of the following procedures are required to configure Windows NT for Symposium Call Center Server. Follow the procedures in this section in the order in which they appear.

To verify the installation of Service Pack 3

- 1 Log on to Windows NT as Administrator.
- 2 Open the Control Panel (from the Windows Start menu, choose Settings → Control Panel).

Result: The Control Panel appears.



- 3 From the Help menu, select About Windows NT.
- 4 Verify that the Windows NT 4.0 version includes the phrase "Service Pack 3." If you do not see this phrase, you must install the service pack

from the installation CD-ROM. For instructions, refer to the *Nortel Networks Meridian Application Server Installation and Maintenance Guide* for your hardware platform.

ATTENTION

If you must install or reinstall any features on Windows NT (for example, if you must reinstall SNMP, reinstall RAS, or install a new network card), then you must reinstall Service Pack 3.

To apply the Microsoft hot fix

Note: Perform this procedure during a new server installation, after installation of Service Pack 3. If you reinstall Service Pack 3, you must perform this procedure again after the reinstallation.

- 1 Log on to the the server as Administrator.
- 2 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive.
- 3 Make sure that hidden files are visible. To do so, follow these steps:
 - a. In Windows NT Explorer, choose View → Options.
 - b. Select Show all files.
 - c. Click Apply, and then click OK.
- 4 Copy the folder Hotfixes\Microsoft\q178741 on the CD to the root of drive D.
- 5 In Windows NT Explorer, click the D:\Hotfixes\Microsoft\q178741 folder.
- 6 Double-click the file hfx.exe, located in this folder.

Result: The Hotfix Manager window opens.

- 7 Click InstallNewFix.

Result: The Install Path dialog box opens.

- 8 Make sure that the path specified is D:\Hotfixes\Microsoft\q178741\hotfix.inf. If it is not correct, browse to this path.
- 9 Click OK.

Result: The program installs the hot fix on the server. When the installation is complete, the program notifies you that Windows NT has been updated.

- 10 Click OK.

Result: The system prompts you to restart. Do not click OK yet.

- 11 When the HotFix Manager appears, click Done.

- 12 Restore the settings for hidden files. To do so, follow these steps:

- a. In Windows NT Explorer, choose View → Options.
- b. Select Hide files of these types.
- c. Click Apply, and then click OK.

- 13 Click OK to restart the server.

Result: The server restarts.

Note: If the server hangs during the restart, restart it manually.

To verify that RAS and SNMP are installed, and to install them if required

- 1 In the Control Panel window, double-click the Network icon.

Result: The Network property sheet opens.

- 2 Click the Services tab.

- 3 If you plan to use SNMP, verify that it is in the list of services. If it is not present, and you plan to use it, follow these steps:

- a. Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 in the CD-ROM drive.
- b. Click Add.
- c. Select SNMP Services.
- d. Click OK.

Note: Be sure to configure SNMP to forward traps to an NMS. See the following procedure.

- 4 If Remote Access Service is not in the list of services, follow these steps:
 - a. Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 in the CD-ROM drive.
 - b. Click Add.
 - c. Select Remote Access Services.

d. Click OK.

Note: Be sure to follow the procedures in “To configure the Remote Access Service” on page 56 and “Configuring the modem for Remote Access Service” on page 60 to configure RAS.

- 5 Install Service Pack 3. For detailed instructions, refer to the *Maintenance Guide* for your hardware platform.
- 6 Apply the Microsoft hot fix (see “To apply the Microsoft hot fix” on page 36).

To configure the Windows NT SNMP service to forward traps to an NMS (optional)

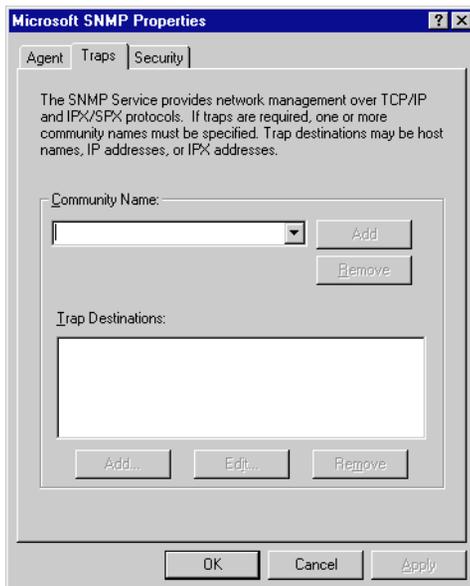
- 1 In the Control Panel window, double-click the Network icon.

Result: The Network property sheet opens.

- 2 Click the Services tab.
- 3 In the list of Network Services, select SNMP Service.
- 4 Click Properties.

Result: The SNMP Properties property sheet appears.

- 5 Click the Traps tab.



- 6 If no community name is defined, type **public** and click Add.
- 7 Add a trap IP destination by clicking Add and typing the IP address of the NMS.
- 8 Click OK.
Result: The SNMP Properties property sheet closes.
- 9 Click Close.
Result: The Network property sheet closes.
- 10 In the Control Panel window, double-click the Services icon.
Result: The Services dialog box appears.
- 11 Select the SNMP Trap Service.
- 12 Click Start.
Result: The SNMP Trap Service starts.
- 13 Click Close.
Note: You must also configure the NMS to receive and interpret traps.

To verify that the RAS service is set to automatic

This service must be set to automatic to support dial-in connections from the client PC or from support personnel.

- 1 In the Control Panel window, double-click Services.
- 2 Scroll to Remote Access Service.
- 3 If Remote Access Service is not set to automatic, then do the following:
 - a. Select Remote Access Service.
 - b. Click Startup.
 - c. Select Automatic.
- 4 Click OK.

To verify the virtual memory settings and change them, if required

Follow this procedure to verify the virtual memory (that is, swapfile) settings. For efficient operation, Nortel Networks recommends that the server be configured for 268 Mbytes of virtual memory.

- 1 In the Control Panel window, double-click System.
- 2 Click the Performance tab.
- 3 In the Virtual Memory section, click Change.
The Virtual Memory dialog box opens.
- 4 Select drive D.
- 5 Under Paging File Size for Selected Drive, ensure that the values are
 - 268 Mbytes for Initial Size
 - 268 Mbytes for Maximum Size
- 6 If the values for Initial Size and Maximum Size are correct, then click Cancel to exit.
- 7 If you need to change the values for Initial Size and Maximum Size, then follow these steps:
 - a. Enter 268 for Initial Size, and 268 for Maximum Size.
 - b. Click Set, and then click OK.

Result: You return to the System Properties property sheet.

- c. Click OK.
- d. Click No when prompted to restart the server. You can restart the server later.

Note: Do not split virtual memory across multiple drives.

For more information on memory requirements, refer to the *Nortel Networks Symposium Call Center Server Planning and Engineering Guide*.

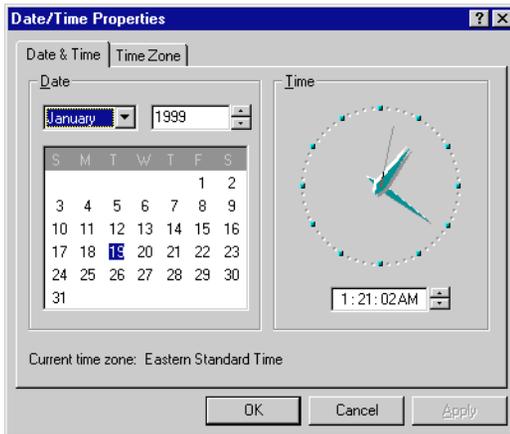
To change the date, time, and time zone

Set the server date and time now to help with the analysis of system events that occur in Windows NT Event Viewer during installation.

Note: For the Meridian 1 switch, after the server is fully operational and connected to the switch, the switch controls the date and time.

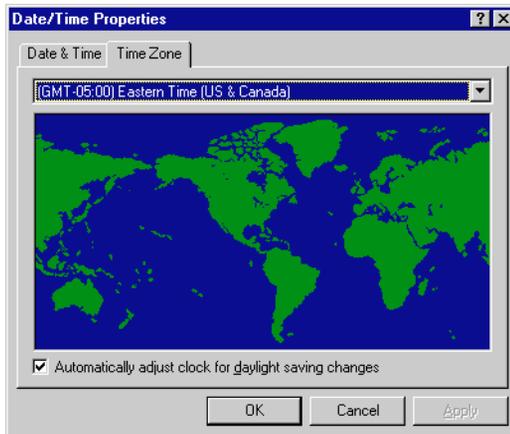
- 1 In the Control Panel window, double-click the Date/Time icon.

Result: The Date/Time Properties property sheet appears.



- 2 Click the Time Zone tab.

Result: The Time Zone property page appears.



- 3 Select the appropriate time zone from the drop-down list box.
- 4 If you are using a Meridian 1 switch, ensure that Ensure that Automatically adjust clock for daylight saving changes is unchecked. If you are using a DMS switch, ensure that Ensure that Automatically adjust clock for daylight saving changes is checked.
- 5 Click the Date & Time tab.
- 6 Select the current month, year, day, and time.
- 7 Click OK.

To set the TZ system variable

- 1 In the Control Panel window, double-click System.
- 2 Click the Environment tab.
- 3 Select a variable in the System Environment Variables box to activate the Variable and Value fields.

Result: The selected variable appears in the Variable box at the bottom of the screen.

- 4 Replace the variable displayed in the Variable box at the bottom of the screen with the letters TZ.

- 5 Click in the Value box and enter the TZ value for this installation using the TZ value formula. See the examples in "Sample TZ values" on page 29.

- 6 Click Set.

Result: The new TZ system variable appears in the System Environment Variables box.

- 7 Click OK.

Result: The Control Panel appears.

To change event viewer settings

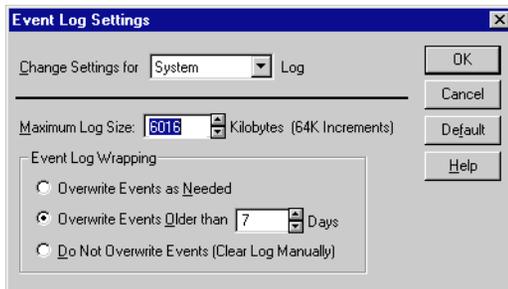
Change the event viewer settings if the default value will not store enough information about system events within Symposium Call Center Server.

- 1 From the Windows Start menu, choose Programs → Administrative Tools (Common) → Event Viewer.

Result: The event viewer window appears.

- 2 Choose Log → Log Settings.

Result: The Event Log Settings dialog box appears.



- 3 Change the value in the Maximum Log Size field by entering a new value (in kilobytes), according to the following guidelines:

- For a small call center with few agents, leave the value at default (512 kbytes)
- For a medium-size call center with a moderate number of agents, set the value at 6016 kbytes or more, depending on the number of days of event history to be kept (that is, the more days that event records are kept, the larger the log size must be).

- For a large call center with many agents, set the value at 10 000 kbytes or greater, depending on the number of days of event history to be kept.
- 4 Click OK to close the window.

To change the computer and workgroup names

The computer name and workgroup name uniquely identify the server on your network.



CAUTION

Risk of database errors

To prevent database errors, make sure the computer's DNS host name matches the computer name. During this procedure, you are instructed to verify that the DNS host name matches the computer name.

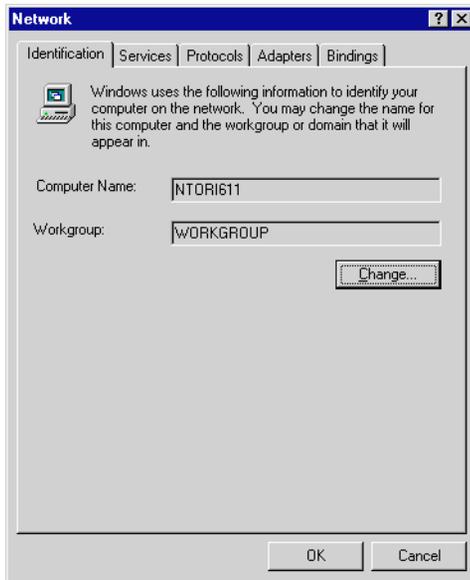
ATTENTION

Record the default computer name and provide a copy to the local system administrator. The default computer name is assigned at the factory and uniquely identifies the server. If you need to call your Nortel Networks Customer Support representative because of a problem with the server, you need the default computer name to identify the server.

The server must be assigned to a Windows NT workgroup, not a domain. If the server is a member of a domain, the server software might not function.

- 1 In the Control Panel window, double-click Network.

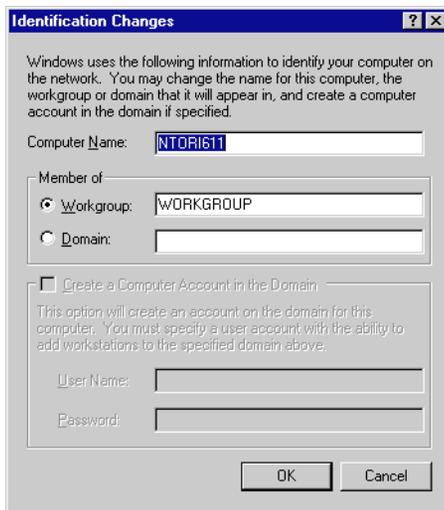
Result: The Network property sheet appears.



- 2 Record the default Computer Name and provide a copy to the system administrator.

3 Click Change.

Result: The Identification Changes dialog box appears.



4 Enter the new computer name. The new computer name must be a single word without spaces, 6 to 15 characters long. Letters, numbers, a hyphen, and a dash are allowed.

5 Click OK.

Result: A message appears, indicating that the name change was successful.

6 Click OK.

Result: The Network property sheet appears.

7 Click Change.

8 You return to the Identification Changes dialog box.

9 Select the Workgroup option.

ATTENTION

The server must be in a workgroup. It cannot be a member of a domain, or else the server software can fail to function.

10 Enter the workgroup name.

11 Click OK.

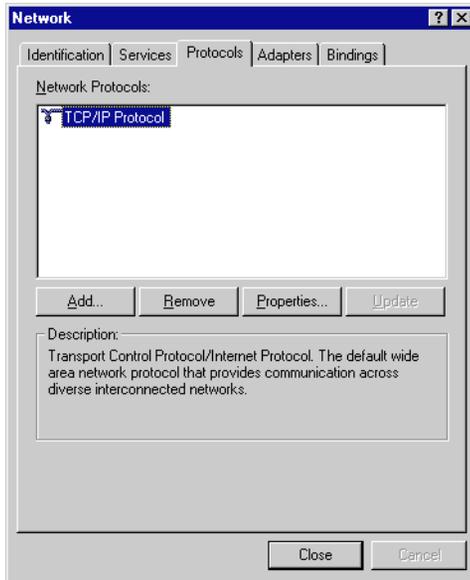
Result: A welcome message appears.

12 Click OK.

Result: The Network property sheet appears.

13 In the Network property sheet, click the Protocols tab.

Result: The Protocols property page appears.



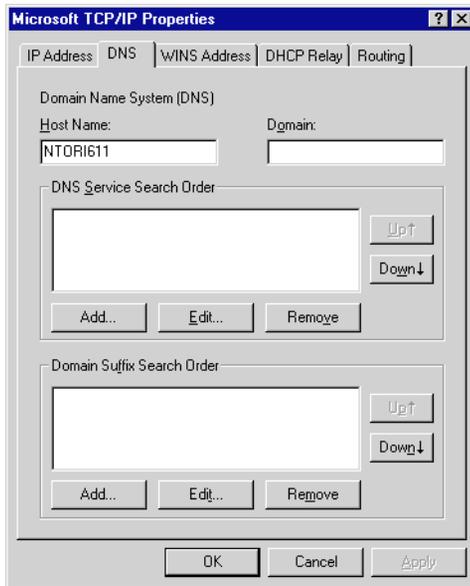
14 Select TCP/IP Protocol from the list of installed network software.

15 Click Properties.

Result: The Microsoft TCP/IP Properties property sheet appears.

- 16 Click the DNS tab.

Result: A DNS property page appears, similar to the following sample:



- 17 Change the DNS Host Name to match the Computer Name.

Note: The Host Name and Computer Name must match *exactly*, including uppercase and lowercase letters.

- 18 Click OK.

Result: The Network property sheet appears.

- 19 Click CLOSE to complete the change.

Do not restart the server at this time as it will be restarted later.

Configuring TCP/IP for ELAN, CLAN, and Remote Access Service

Introduction

To enable communication with the server, you must configure TCP/IP for the

- ELAN network interface card (NIC) (see below)
- CLAN NIC (see page 52)
- Remote Access Service (RAS) (see page 56)

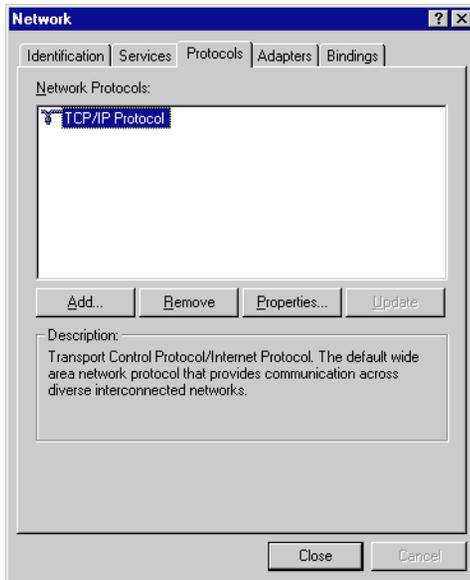
These procedures apply to initial installation only. If you are performing a system rebuild, these procedures do not apply.

To configure the ELAN NIC

- 1 Log on to Windows NT as Administrator.
- 2 Open the Control Panel (from the Windows Start menu, choose Settings → Control Panel).
- 3 In the Control Panel window, double-click Network.

- 4 In the Network property sheet, click the Protocols tab.

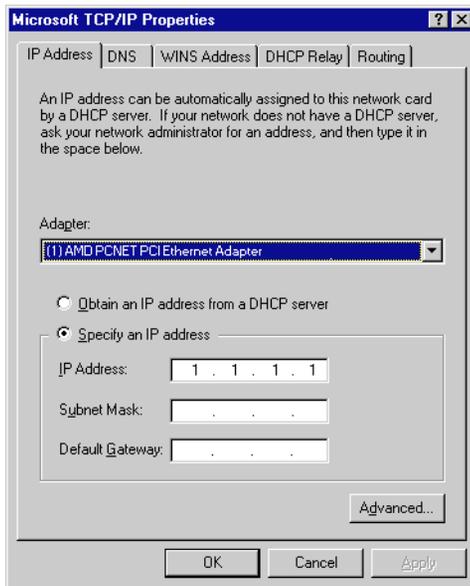
Result: The Protocols property page appears.



- 5 Select TCP/IP Protocol from the list of network protocols.

6 Click Properties.

Result: A Microsoft TCP/IP Properties property sheet appears, similar to the following example:



Note: The server must not be a DHCP client.

7 In the Adapter box, select the adapter in the drop-down list that has the placeholder IP address, 1.1.1.1. This adapter is the ELAN card.

Tip: Write down the Ethernet adapter name for the ELAN card and give this information to the local administrator for future reference. If you have to reinstall the ELAN card, you need to know the name of the ELAN card.

8 Click Specify an IP address.

9 Enter the server's ELAN IP address in the IP Address box.

ATTENTION

Make sure that the ELAN IP address is unique and is not used by any other devices or locations on the LAN or WAN.

10 In the Subnet Mask box, enter the server's ELAN subnet mask.

11 Ensure that the Default Gateway box is blank.

- 12 Click OK.

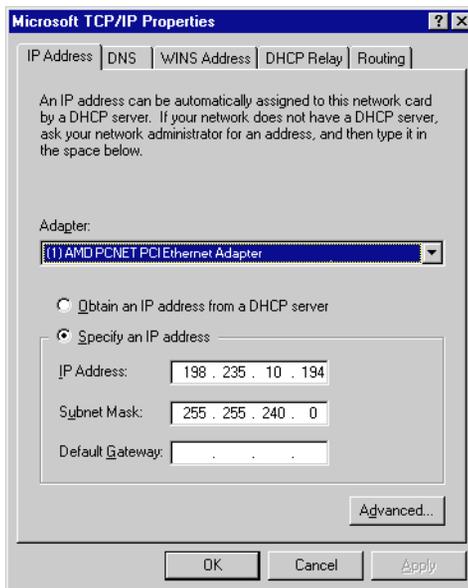
Result: You return to the Network property sheet.

- 13 Continue with the following procedure.

To configure the CLAN NIC

- 1 On the Protocols property page of the Network property sheet, select TCP/IP Protocol.
- 2 Click Properties.

Result: The Microsoft TCP/IP Properties property sheet appears.



Note: The server must not be a DHCP client.

- 3 In the Adapter box, select the adapter in the drop-down list that has the placeholder IP address, 2.2.2.2. This adapter is the CLAN card.

Tip: Write down the Ethernet adapter name for the CLAN card and give this information to the local administrator for future reference. If you have to reinstall the CLAN card, you need to know the name of the CLAN card.

- 4 Click Specify an IP address.
- 5 Enter the server's CLAN IP address in the IP Address box.

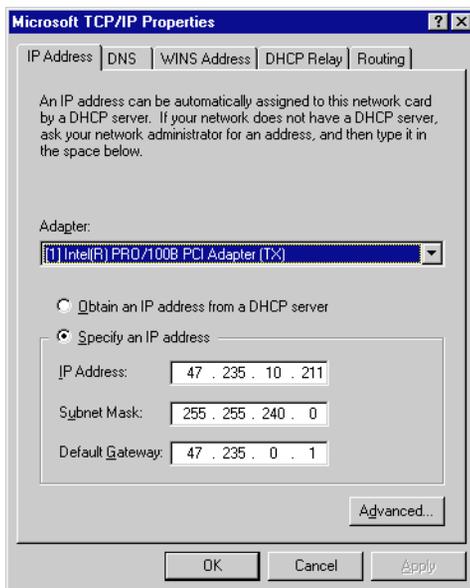
- 6 Enter the server's CLAN subnet mask in the Subnet Mask box.
- 7 Enter the gateway IP address in the Default Gateway box.
Note: To enter more IP addresses, subnet masks, and gateways, click Advanced.
- 8 Click OK.
Result: You return to the Network property sheet.
- 9 Continue with the following procedure.

To configure the server to support DHCP client PCs

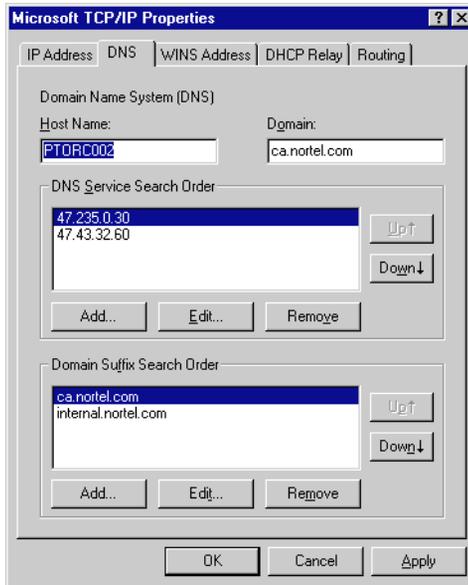
If your client PCs use Dynamic Host Control Protocol (DHCP) to communicate with the server, you must select and configure the DNS and WINS options. To configure DNS and WINS, perform the following steps.

- 1 On the Protocols property page of the Network property sheet, select TCP/IP Protocol.
- 2 Click Properties.

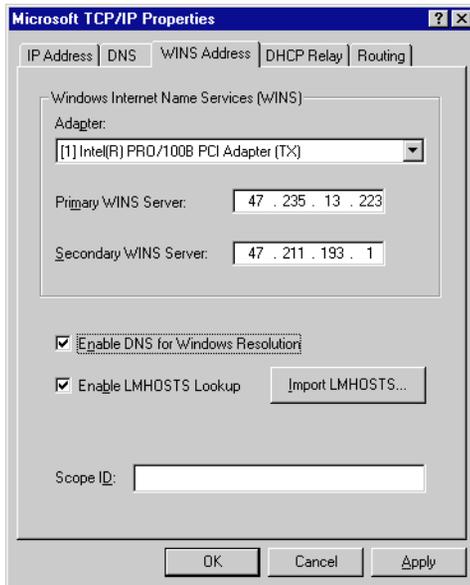
Result: The Microsoft TCP/IP Properties property sheet appears.



- 3 Click the DNS tab and ensure that the Host Name and Domain fields show the computer's host name and domain name.



- 4 Click the WINS Address tab and ensure that the check boxes entitled Enable DNS for Windows Resolution and Enable LMHOSTS Lookup are checked.



Result: When you configure DNS and WINS services, you enable the server to communicate scheduled reports information with the client PCs.

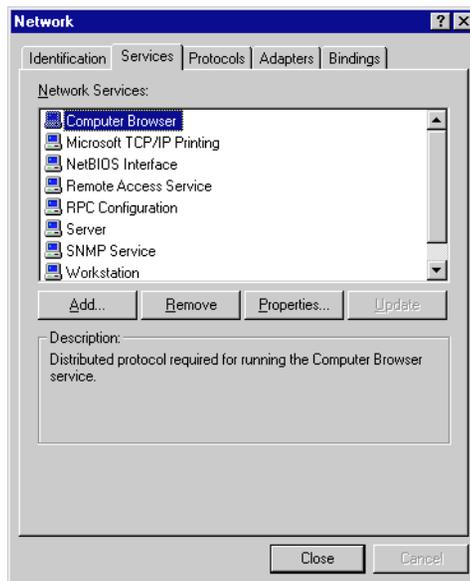
If DNS or WINS is not configured, the server cannot determine the IP address of the clients, and no scheduled report information is sent from the server back to the client.

To configure the Remote Access Service

Note: The server Remote Access Service requires a pool of IP addresses to grant dial-in privileges to remote clients. To assign a pool, you specify a range of CLAN or ELAN IP addresses. This range must include at least two available IP addresses. Remote Access Service uses the first IP address. The remaining IP addresses are loaned to each dial-in client. Put careful thought into the range of IP addresses provided.

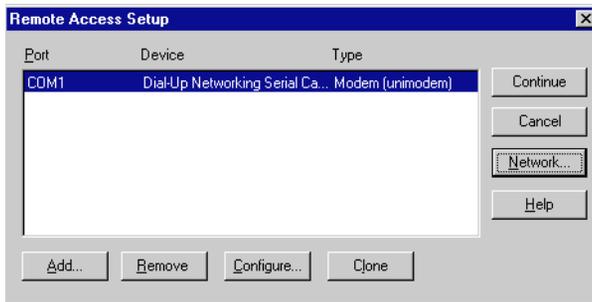
- 1 In the Network property sheet, click the Services tab.

Result: The Services property page appears.



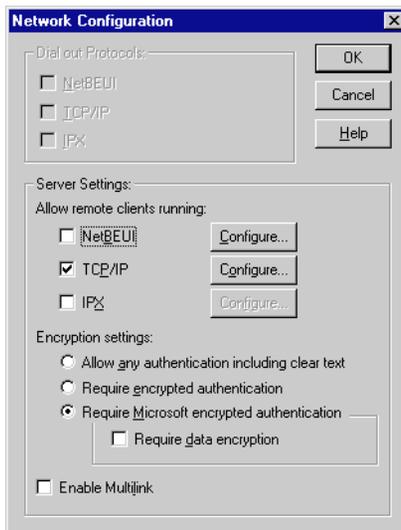
- 2 Select Remote Access Service, and then click Properties.

Result: The Remote Access Setup dialog box appears.



- 3 Click Network.

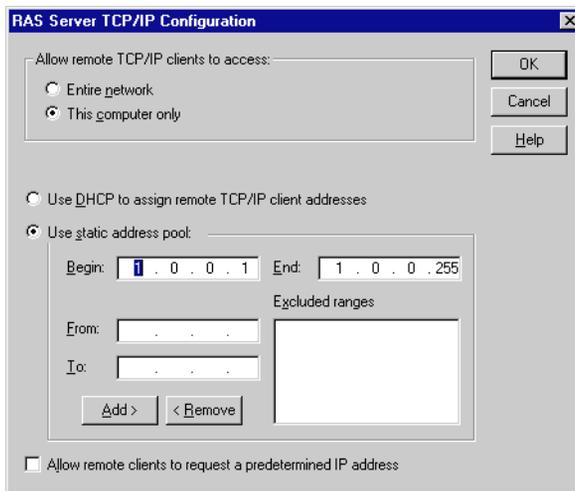
Result: The Network Configuration dialog box appears.



- 4 In the Server Settings section, select TCP/IP.

- 5 Click TCP/IP Configure.

Result: The RAS Server TCP/IP Configuration dialog box appears.



- 6 Click This computer only.
- 7 Click Use static address pool.
- 8 Enter the range of CLAN or ELAN IP addresses in the Begin and End boxes.
Note: Use the From and To boxes and the Add and Remove buttons to exclude one or more IP address ranges.
- 9 Ensure that the Allow remote clients to request a predetermined IP address check box is *not* checked.
- 10 Click OK to close the RAS Server TCP/IP Configuration dialog box.
Result: You return to the Network Configuration property sheet.
- 11 Click OK.
Result: You return to the Remote Access Setup dialog box.
- 12 Click Continue.
Result: You return to the Network property sheet.
- 13 Continue with the following procedure.

To save the network settings

- 1 In the Network property sheet, click OK.

Result: You might be prompted with a warning indicating that at least one installed NIC contains an empty primary WINS address. Ignore this warning and click Yes. You are then asked if you want to restart your computer.

- 2 Click Yes to restart the server.

Result: The server restarts.

Configuring the modem for Remote Access Service

Service

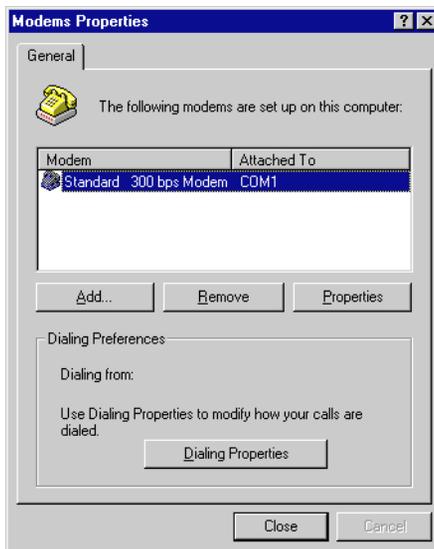
Introduction

Follow this procedure to configure the modem for Remote Access Service (RAS) for remote support of the server.

To configure the modem

- 1 Log on to Windows NT as Administrator.
- 2 Open the Control Panel (from the Windows Start menu, choose Settings → Control Panel).
- 3 In the Control Panel window, double-click Modems.

Result: The Modems Properties property sheet appears.

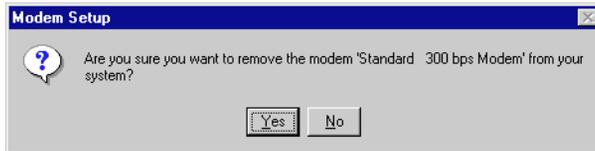


- 4 If a modem is listed and it matches the actual modem installed, then do the following:
 - a. Exit from the Modems control panel.

b. Go to “What’s next?” on page 65.

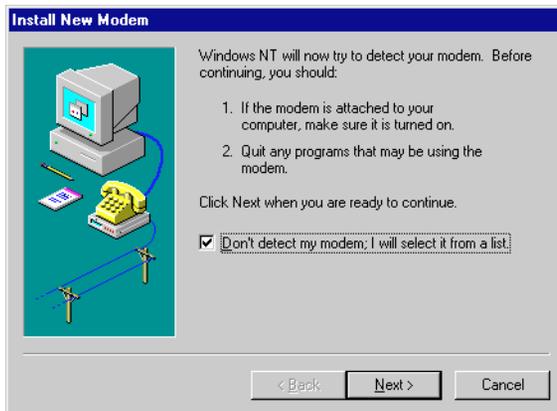
- 5 If a modem is listed and it does not match the actual modem installed, then select it and click Remove.

Result: The system prompts you with a message similar to the following:



- 6 Click Yes.
- 7 Click Add to add the correct modem.

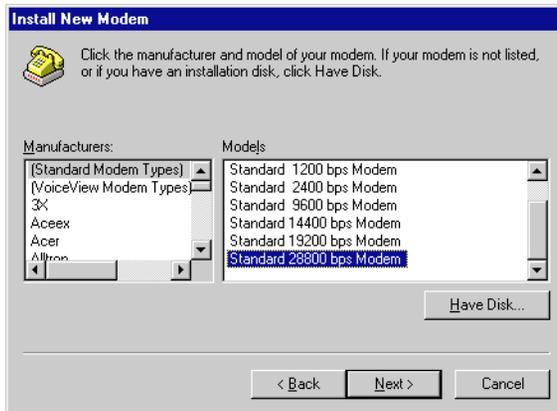
Result: The Install New Modem window appears.



- 8 Check the Don't detect my modem; I will select it from a list box.

9 Click Next.

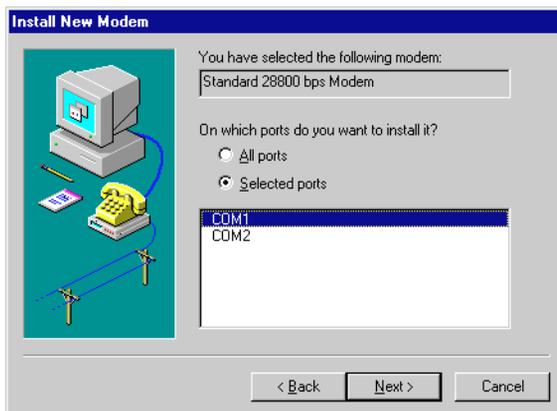
Result: The system prompts you to select your modem.



Note: If you are using an internal modem, insert the driver disk that came with the modem and then click Have Disk to continue.

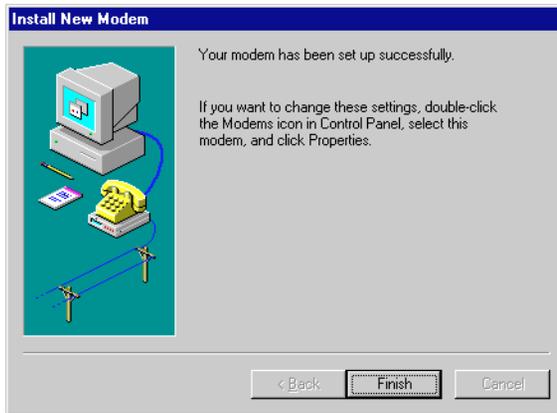
10 Select the type of modem installed on the server and click Next. If your modem is not listed, select the Standard 28800 bps Modem, and then click Next.

Result: The following dialog box appears.



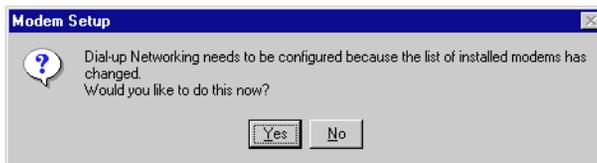
- 11 Click Selected ports, select COM1, and then click Next.

Result: The following dialog box appears.



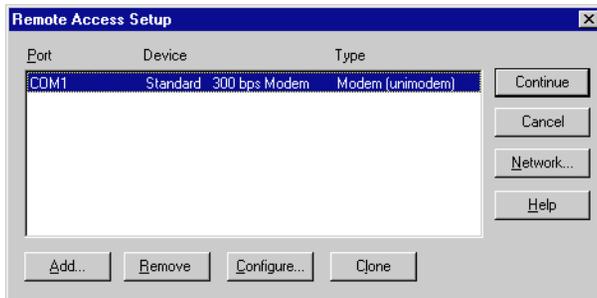
- 12 Click Finish to complete installing the modem.
 13 Click Close to close the Modems Properties property sheet.

Result: The system prompts you for changes to Dial-Up Networking because the modem has changed.



- 14 Click Yes to continue.

Result: The Remote Access Setup dialog box appears.



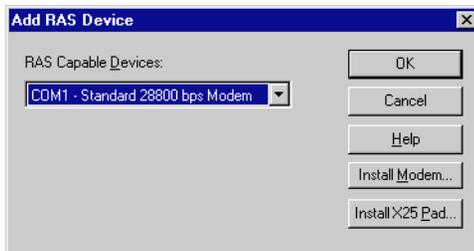
- 15 Select the old modem listed (usually on COM1).
- 16 Click Remove.

Result: The following window appears.



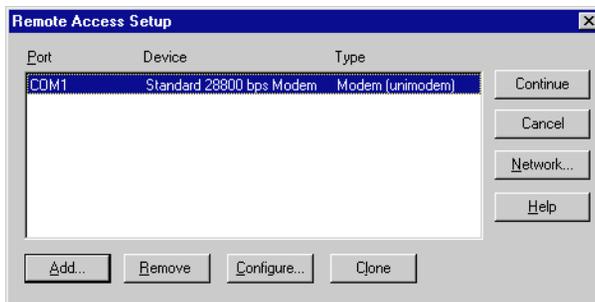
- 17 Click Yes to confirm that you want to remove the modem.
- 18 Click Add.

Result: The Add RAS Device dialog box appears.



- 19 Select the installed modem from the drop-down list, and then click OK.

Result: The Remote Access Setup dialog box appears.



20 Click Continue to save the changes.

Result: The system prompts you to restart.



21 Click No. You can restart later.

What's next?

If your system has additional optional drives that were not formatted at the factory, see “Formatting optional drives” on page 66.

If your system does not have additional optional drives, continue with “Updating the emergency repair disk” on page 68.

Formatting optional drives

Introduction

Follow this procedure only if the server is equipped with optional multiple drives that have not been factory-formatted. Drives C and D, which are two partitions on a single drive, are formatted at the factory. For details about disk partitioning, refer to the *Nortel Networks Meridian Application Server Installation and Maintenance Guide* for your hardware platform.

To format optional drives

Follow these procedures to format optional drives.



CAUTION

Risk of data loss

Use only the Disk Administrator functions documented in this procedure.



CAUTION

Risk of data loss

Drives C and D must be two partitions of the primary hard drive (drive 0). Drive C must be a DOS partition, and drive D must contain Windows NT. Usually, drive E is the CD-ROM drive.

- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Programs → Administrative Tools → Disk Administrator.

Result: The Disk Administrator window appears. This window shows partition and formatting information for all installed drives. If drives are not partitioned, continue with the following steps.

- 3 Select the unpartitioned drive (for example, Disk 1).
- 4 Choose Partition → Create.

- 5 Partition all available space.
Note: The maximum partition size is 4096 Mbytes. If a hard drive is larger than 4096 Mbytes, then you must create two partitions.
- 6 Repeat steps 3 and 4 for the other drives.
- 7 Choose Partition → Commit Changes Now to apply changes.
- 8 Select each drive and format according to the following guidelines:
 - Format each drive using the Tools menu.
 - Format all hard drives after the first hard drive using the NTFS file system.
- 9 Choose Partition → Exit to close the screen.

What's next?

Continue with “Updating the emergency repair disk” on page 68.

Updating the emergency repair disk

Introduction

You must restart the computer and update the emergency repair disk to record the latest configuration data for the server. Do this every time you change the server configuration (for example, if you change the computer name or IP address).

To update the emergency repair disk

- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Shutdown.
Result: The Shut Down Windows dialog box appears.
- 3 Select Restart the computer, and then click Yes.
- 4 When the server restarts, press Ctrl-Alt-Delete to log on.
- 5 Log on to Windows NT as Administrator.
- 6 From the Windows Start menu, choose Programs → Command Prompt.
- 7 Insert the emergency repair disk in the floppy drive. If the disk is not available, insert a blank disk. The program formats it before copying the configuration files.
- 8 In the Command Prompt window, type **rdisk**, and then press Enter.

Result: The Repair Disk Utility dialog box appears.



- 9 Do one of the following steps:
 - If you are updating an existing repair disk, click Update Repair Info.
 - If you have inserted a blank floppy disk, click Create Repair Disk.

- 10 Click Yes in response to the next two prompts.
- 11 At the prompt, `All data on floppy disk is erased`, click OK.
Result: You see messages indicating that the disk is being formatted and configuration files are being copied.
- 12 Close the command prompt window by clicking the Close box at the top right corner of the window.
- 13 Remove the emergency repair disk, label it, and store it in a safe place. You must update it again after installing the application software on the server.

Testing the network connection

Introduction

Follow the procedure in this section to ensure that the network is accessible to the server, and to ensure that traffic on the CLAN is isolated from the ELAN.

To test the ELAN and CLAN network connection

- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Programs → Command Prompt.
- 3 In the Command Prompt window, type **ping** followed by the ELAN IP address for the switch, and then press Enter.

Example: ping 255.255.255.255

Result: The display indicates whether the ping was successful.

If a successful ping message is not received, then no connection has been made. If no connection has been made, follow the steps in “Troubleshooting network connection problems” on page 288.

- 4 If a CLAN card is installed on the server, type **ping** followed by the CLAN IP address of another PC on the CLAN, and then press Enter.

Example: ping 255.255.255.255

Result: The display indicates whether the ping was successful.

If a successful ping message is not received, then no connection has been made. If no connection has been made, follow the steps in “Troubleshooting network connection problems” on page 288.

- 5 Type **exit** and press Enter to close the Command Prompt window.

To verify that the ELAN and CLAN are isolated from each other

Follow these steps at each server (including the NCC).

- 1 Ping a client PC on the CLAN.
- 2 Ping another machine on the ELAN (for example, the switch).

Note: The NCC is not connected to a switch on the ELAN, so ping a test machine.

- 3 Disconnect the ELAN cable from the server.
- 4 Repeat steps 1 and 2.
Result: Only the CLAN ping should be successful.
- 5 Reconnect the ELAN cable to the server, and disconnect the CLAN cable.
- 6 Repeat steps 1 and 2.
Result: Only the ELAN ping should be successful.
- 7 Reconnect the CLAN cable to the server.

Shutting down and restarting the server

Introduction

To put configuration changes into effect, you must restart the server. If you have followed the procedure in “Updating the emergency repair disk” on page 68, then you have already restarted the server and do not need to restart it again. If you have not updated the emergency repair disk, proceed to shut down and restart now.

To shut down and restart the server

- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Shut Down.

Result: The Shut Down Windows dialog box appears.



- 3 Select Restart the computer, and then click Yes.
- 4 The server restarts.

Chapter 4

Preparing the server for remote access

In this chapter

Overview	74
Configuring pcANYWHERE32	75
Changing pcANYWHERE32 caller passwords	83
Establishing a pcANYWHERE connection using dial-up	85

Overview

Introduction

With pcANYWHERE32, you can perform advanced administrative tasks on the server from a remote PC and control the server as though you were directly connected to the server.

Installation of pcANYWHERE on the server

One licensed copy of pcANYWHERE32 Version 8.02 is provided for the server on the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0. pcANYWHERE32 is installed at the factory, but you must verify its configuration.

Installation of pcANYWHERE on the client

To install pcANYWHERE32 Version 8.0 on the client PC, you must purchase a separate license for the client PC. For instructions on how to install and configure pcANYWHERE32 on the client PC, refer to the *Nortel Networks Symposium Call Center Server Administrator's Guide*.

Configuring pcANYWHERE32

Introduction

This section describes how to configure pcANYWHERE32 to accept remote connections. pcANYWHERE32 might already be configured when you first receive your server. If so, then go through the procedures to ensure that the network properties and remote caller settings are correct. Then go to “Changing pcANYWHERE32 caller passwords” on page 83.

Configuring the network settings and remote PC caller accounts

The procedure in this section (see page 76) defines the NGenDist and NGenDesign user accounts and passwords for remote users logging on to the server using pcANYWHERE32. This ensures that only authorized users can administer the server using pcANYWHERE32. The procedure also specifies how to set up the pcANYWHERE32 network properties to enable these remote PC callers to access the server.

Password recommendations

Plan the passwords you want to use for NGenDist and NGenDesign (see “Password recommendations” on page 114). Use the same passwords for the pcANYWHERE32 NGenDist and NGenDesign caller passwords that you plan to use for the Windows NT NGenDist and NGenDesign accounts. This simplifies the remote logon process.

To maintain remote access security, change the passwords for the NGenDist and NGenDesign caller accounts regularly. Continue to match the pcANYWHERE32 caller passwords for NGenDist and NGenDesign to the Windows NT user account passwords for NGenDist and NGenDesign.

To verify that the pcANYWHERE service is set to automatic

The service must be set to automatic to support dial-in connections from the client PC or from support personnel.

- 1 Log on to Windows NT as Administrator.
- 1 In the Control Panel window, double-click Services.
- 2 Scroll to pcANYWHERE Host Service.
- 3 If pcANYWHERE Host Service is not set to automatic, then do the following:
 - a. Select pcANYWHERE Host Service.
 - b. Click Startup.
 - c. Select Automatic.
- 4 Click OK.

To set the video mode

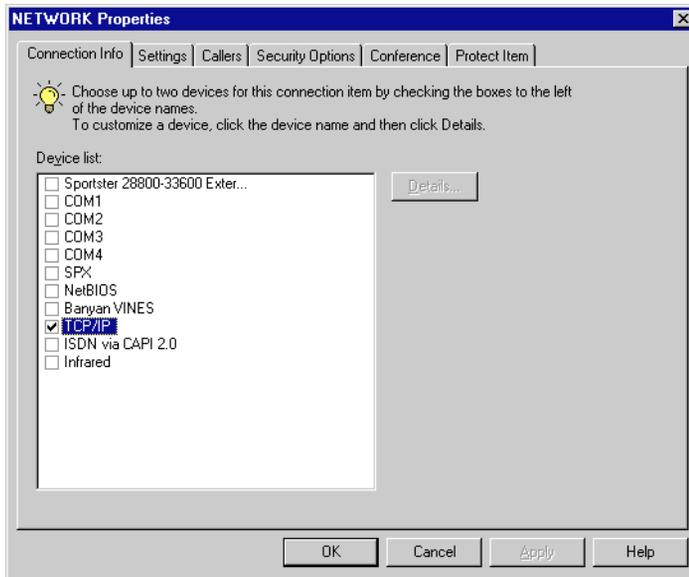
- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Programs → pcANYWHERE32 → pcANYWHERE.
- 3 From the File menu, select Application Options.
- 4 Select the Host Operation tab.
- 5 For Video mode, ensure the selected option in the drop-down list is Default.
- 6 Click Apply.
- 7 Click OK to exit.

To configure the network icon and remote PC caller accounts

- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Programs → pcANYWHERE32 → pcANYWHERE.
- 3 Select Be a Host.
- 4 Right-click on the Network icon. Then select Properties.

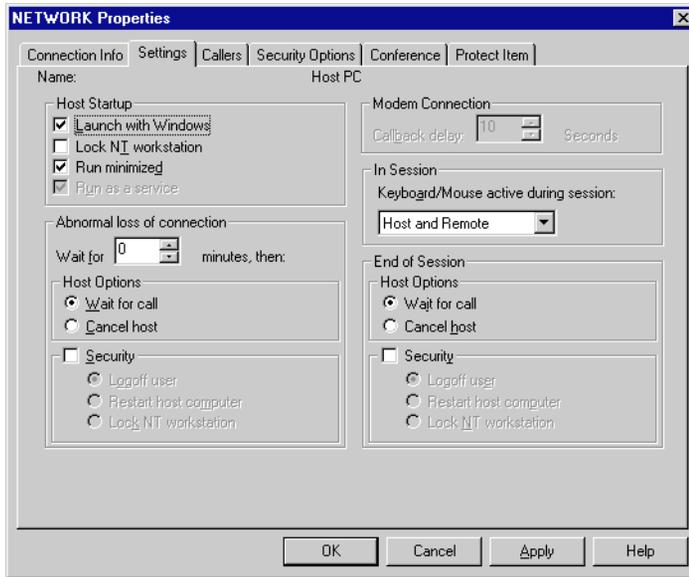
Result: The NETWORK Properties property sheet appears.

- 5 Click the Connection Info tab.
- 6 Ensure that only TCP/IP is checked, as in the following example:



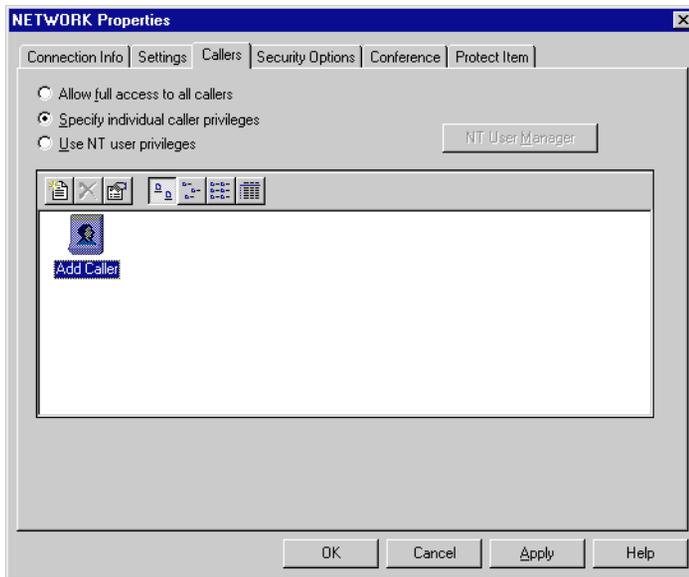
- 7 Click the Settings tab.

- 8 Ensure that settings are as shown in the following example:



- 9 Click the Callers tab.

- 10 Select Specify individual caller privileges, as in the following example:



Note: If NGenDist and NGenDesign caller icons have already been created, then skip to step 19.

- 11 Double-click Add Caller.

Result: The New Caller Wizard window appears.

- 12 Enter a name for the caller (for example, NGenDist), and then click Next.

- 13 Type **NGenDist** for the logon name.

- 14 In the Password field, type a new NGenDist password.

- 15 In the Confirm Password field, type the new NGenDist password again.

- 16 Click Next.

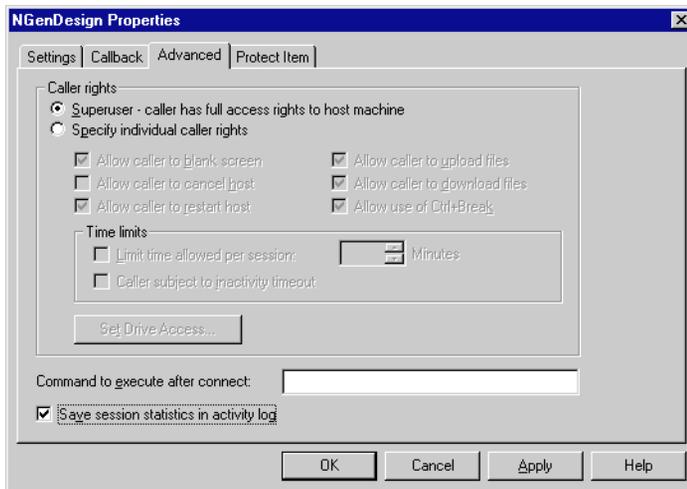
- 17 Click Finish.

- 18 Repeat steps 11 to 17 for the NGenDesign account, using the NGenDesign password.

- 19 Right-click the NGenDesign caller icon. Then select Properties.

- 20 Click the Advanced tab.

- 21 Select Superuser, as shown in the following example:

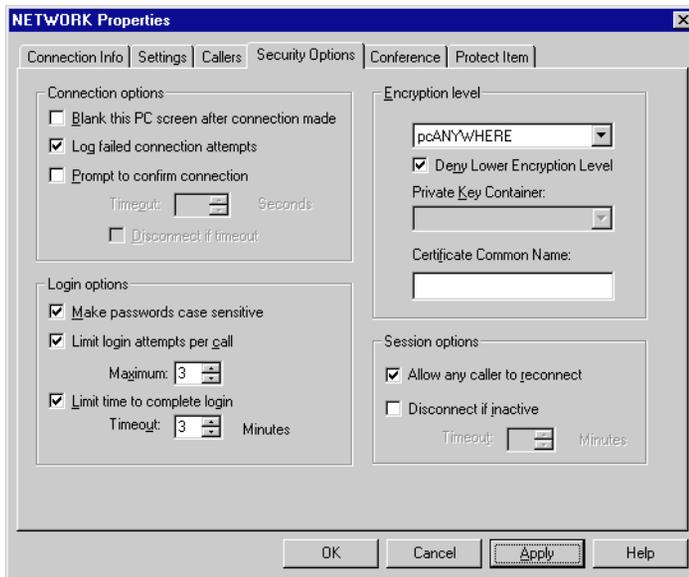


- 22 Click OK.

Result: The NETWORK Properties sheet appears.

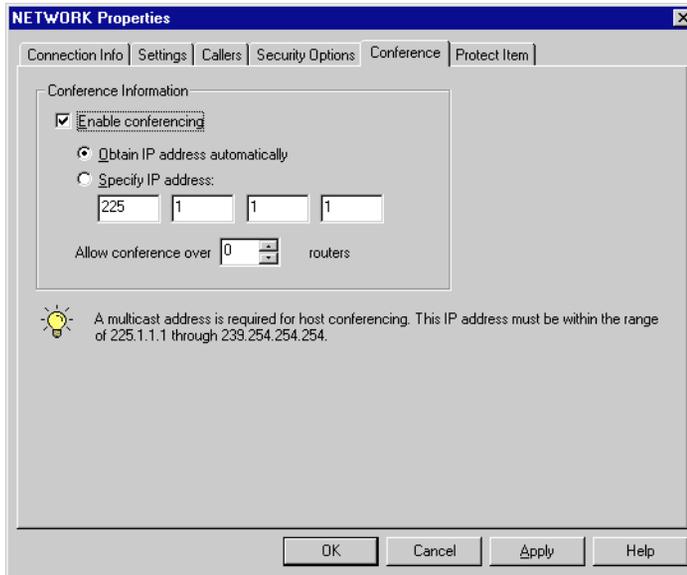
- 23 Click the Security Options tab.

- 24 Ensure that settings are as shown in the following example:



- 25 Click the Conference tab.

- 26 Ensure that Enable conferencing and Obtain IP address automatically are selected, as shown in the following example:



- 27 Click the Protect Item tab.

Note: If you want to assign a password to control who can modify the Network icon settings, then enter a password on this screen.

- 28 Click OK to apply all pcANYWHERE32 settings.

What's next?

Continue with Chapter 5, "Installing the server software."

Changing pcANYWHERE32 caller passwords

Introduction

During the installation and configuration of pcANYWHERE32, you specify logon passwords for the NGenDist and NGenDesign callers. To maintain system security, change these passwords periodically.

Note: To simplify the remote logon process, match the pcANYWHERE32 caller passwords for NGenDist and NGenDesign to the Nortel Networks user account passwords for NGenDist and NGenDesign. Change the pcANYWHERE32 caller passwords and the Windows NT user account passwords for NGenDist and NGenDesign at the same time.

To change passwords

- 1 Log on to Windows NT as Administrator.
- 2 From the Windows Start menu, choose Programs → pcANYWHERE32 → pcANYWHERE.
Result: pcANYWHERE32 starts.
- 3 Select Be a Host PC.
- 4 Click Network.
Note: Do not double-click the icon or you will begin a pcANYWHERE32 session.
- 5 From the File menu, select Properties.
Result: The NETWORK Properties sheet appears.
- 6 Click the Callers tab.
- 7 Click Specify individual caller privileges.
- 8 Right-click the NGenDist icon. Then select Properties.
- 9 Click the Settings tab.
- 10 In the Password field, type a new NGenDist password.
- 11 In the Confirm Password field, type the NGenDist password again.
- 12 Click Apply.

- 13** Click OK.
- 14** Right-click the NGenDesign icon. Then select Properties.
- 15** Repeat steps 8 to 13 to assign a new password to NGenDesign.
- 16** Click OK to return to the main pcANYWHERE32 window.
- 17** Exit pcANYWHERE32.

Establishing a pcANYWHERE connection using dial-up

Introduction

This section describes how to establish a pcANYWHERE connection with the server using a dial-up connection.

To create a server connection profile (for Windows 95 or 98 client PC)

- 1 From the Windows Start menu, choose Programs → Accessories → Dial-Up Networking or Programs → Accessories → Communication → Dial-Up Networking.

Result: If no connections have been defined on this PC, the Make New Connection wizard appears.

If one or more connections has been created on this PC, click the Make New Connection icon in the Dial-Up Networking window to display the wizard.

- 2 Enter a name for the connection and select a modem.
- 3 Click Next.
- 4 Enter the server telephone number, and then click Next.
- 5 Click Finish.
- 6 Continue with the following procedure.

To configure a connection profile

- 1 Right-click on the server connection profile icon, and then select Properties.
- 2 Verify the information on the General property page, and correct it if necessary.
- 3 Click Configure.

Result: The Modem Properties property sheet appears.

- 4 Update the tabs as required, and then click OK.

Result: You return to the connection property sheet.

- 5 Click Server Types.
- 6 For Dial-Up Server, select PPP:Windows NT.
- 7 For the network protocols, select only TCP/IP and NETBEUI.
- 8 Click TCP/IP settings.
Result: The TCP/IP Settings property sheet appears.
- 9 Select Specify an IP address, and enter the server IP address.
- 10 Select Use default gateway on remote network.
- 11 The remaining fields are optional. Fill them in as required for the customer's network.
- 12 Click OK.
Result: You return to the connection property sheet.
- 13 Click OK.

To establish a connection to the server

- 1 Log on to the client PC.
- 2 From the Windows Start menu, choose Programs → Accessories → Dial-Up Networking or Programs → Accessories → Communication → Dial-Up Networking.
- 3 Double-click the server connection profile icon.
Note: If the icon is unavailable, you have not created a server connection profile. See "To create a server connection profile (for Windows 95 or 98 client PC)" on page 85.
- 4 If you are prompted for a user ID and password, enter the user ID and password to log on to the customer's network.
- 5 Wait until the connection is established.
- 6 After connection is established, run pcANYWHERE.
- 7 Double-click the pcANYWHERE remote control icon that you created for the server.
- 8 When prompted, enter the user ID and password for the pcANYWHERE NGenDist caller account that you created on the server.

What's next?

Continue with Chapter 5, "Installing the server software."

Chapter 5

Installing the server software

In this chapter

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Changing the NGenDist and NGenDesign passwords	114
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Installing PEPs and Service Update packs	119
Uninstalling PEPs	121
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Overview

Introduction

This chapter provides the procedures to install the Symposium Call Center Server application software on a PC. For Meridian 1 (M1) systems, the software can be Meridian Link stand-alone software or for installation on a Network Control Center server, depending on the keycode for this installation. Installation procedures are the same, except for the different keycodes supplied. The procedures in this chapter take approximately three hours to complete.

Before you begin

Complete the procedures in Chapter 3, “Configuring Windows NT 4.0 server,” and in Chapter 4, “Preparing the server for remote access.”

Requirements

To install the Symposium Call Center Server application software, you need the following:

- Nortel Networks Symposium Call Center Server Release 3.0 Application CD
- information completed in the worksheets in Chapter 2, “Worksheets and checklists”
- the emergency repair disk that was created in Chapter 3, “Configuring Windows NT 4.0 server”

Note: 256 Mbytes of RAM is the minimum amount of memory required on the server PC.

Methods of installation

Method	Requirements
Run the installation program from the Symposium Call Center Server. Use the CD-ROM drive that is part of the Symposium Call Center Server.	keyboard, mouse, and monitor attached to the server
Run the installation program from the Symposium Call Center Server. Use a remote CD-ROM drive that is accessible over the LAN. Note: This method is not recommended, as network traffic can interfere with proper installation.	keyboard, mouse, and monitor attached to the server
Use pcANYWHERE32 on a remote PC to log in to the Symposium Call Center Server and run the installation program. This might be necessary if you do not have a keyboard and monitor connected to the server, or if the server is in a remote location. Use the CD-ROM drive on the Symposium Call Center Server, or use a CD-ROM drive on a remote PC that is accessible from the Symposium Call Center Server over the LAN.	pc ANYWHERE32 installed on both the Symposium Call Center Server and the remote PC
Run the installation program from a local or remote hard disk copy of the installation CDs.	a copy of the CDs on a local or remote hard disk (accessible over the LAN from the Symposium Call Center Server). The path name of the directory that contains the copy of the CDs cannot contain spaces.

ATTENTION

Installation from a remote CD-ROM drive is supported only if the remote PC is running Windows NT 4.0 Server or Workstation. Installation from a remote CD-ROM drive mounted on a PC running Windows NT 3.51 will fail because Windows NT 3.51 does not support long file names.

Event log

The SysOps Event log (C:\sysops\sysops.log) tracks events associated with any install, reinstall, upgrade, or uninstallation operation. It also tracks any fatal errors that interrupt these operations.

Use any text editor (for example, Notepad) to view the SysOps Event log.

Checklist for installing the server software

Step	✓
Complete the worksheets in Chapter 2, "Worksheets and checklists."	
Obtain the current and default Administrator passwords.	
Configure Windows NT. See Chapter 3, "Configuring Windows NT 4.0 server."	
Establish a connection to the server by attaching a keyboard and monitor, or by using pcANYWHERE32. See page 91.	
Prepare for installation. See page 90.	
Start the setup program. See page 96.	
Install the DMI. See page 96.	
Install the MAS software. See page 99.	
Install the Symposium Call Center Server software on the server. See page 103.	
Install the Symposium Call Center Server software on the client PC. See Chapter 6, "Installing the client software."	
Add an SMI system to the client PC. See Chapter 7, "Adding a System Management Interface system."	
Finish the server software installation. See page 103.	
Install PEPs.	
Create a Platform Recovery disk.	
Create a database backup. See the <i>Administrator's Guide</i> .	
Change the default NGenDist and NGenDesign passwords. See page 114.	
Complete the post-installation checklist. See page 118.	

Preparing for installation

Introduction

This section lists some things you must do to prepare for installation.

Before you begin

Check for any Installation Addendums

Before performing an installation, upgrade, or conversion, check for any Installation Addendums on your regional Symposium Call Center Server technical website. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic.

Be aware of the steps in the installation checklist

See “Checklist for installing the server software” on page 93.

Decide whether to configure the server while it is offline from the switch

At the end of the installation, the server goes into configuration mode. In configuration mode, the server is offline from the switch, so it does not process calls. This allows you to configure the server more efficiently.

For DMS/MSL-100 systems, ensure that the dongle is attached properly

The Symposium Call Center Server installation package includes a dongle. This device verifies that you have the software package that was purchased for this system. You can set up and test Symposium Call Center Server without the dongle. However, before you connect to the switch to go live, you must ensure that the dongle is attached to the parallel port on the back of the server. Without the dongle, the switch and the server cannot communicate.

Check the location of the mapped CD-ROM drive

If you are installing the software from a mapped CD-ROM drive, ensure that the drive is on a local network, not across a WAN or dial-up connection. After some restarts, you must remap the drive.

Note: This method is not recommended, as network traffic can interfere with proper installation.

Make sure that you have the keycode for an NCC server (M1 systems only)

If you are installing a Network Control Center (NCC) server with networking enabled, you must provide a unique keycode and serial number that identify the NCC.

Uninstall third-party software

Do not install third-party software on a Symposium Call Center Server. This can compromise system performance.

Things to remember

Bypass the fault printer warning if it appears

The server has an option to forward fault events to a designated printer. To use this option, you must install a generic text printer. You do not need this printer for the server installation, but a warning box appears if a generic text printer driver is not found. Click OK to bypass this warning and continue with the installation. You can set up printer drivers later.

Minimize the Explorer window

If you run setup.exe from a window (for example, Windows Explorer), the window can appear on top and hide the installation windows. If this happens, minimize the Explorer window or click on the main installation window to regain focus. To avoid this problem, the program instructs you to close all windows and run setup from the Run dialog box.

Installing the server software

Introduction

Installation of Symposium Call Center Server software on the server PC involves the following steps:

1. Install the Database Management Interface (DMI).
2. Install the MAS server software.
3. Install Symposium Call Center Server software.
4. Create a Platform Recovery disk.

After each step, you must restart the server PC to allow changes to take effect.

ATTENTION

During the installation, there are points where the setup program performs automatic installation steps between wizard setup windows. Do not close any windows that appear during these steps. Wait for the next wizard setup window before you use the mouse or keyboard.

If you abort the installation, you must uninstall all components and then restart the installation.

To install DMI

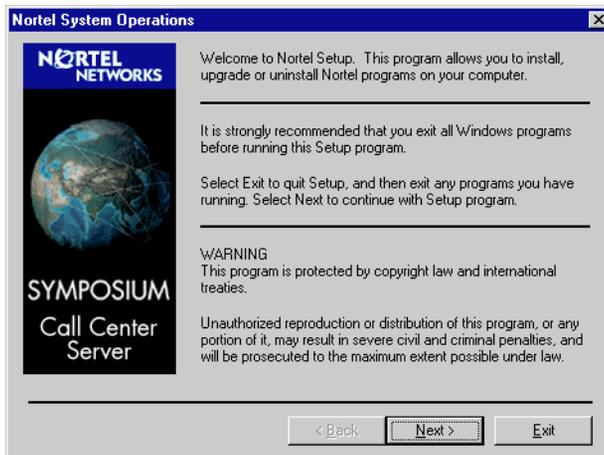
- 1 Insert the Server CD or, if you are installing from a remote CD-ROM or a network share drive, map the Server CD to a drive letter on the server.
- 2 Log on to Windows NT as Administrator.
- 3 Exit all applications, including screen savers, and close all windows.
- 4 From the Windows Start menu, choose Run.
- 5 Click Browse, select Setup.exe from the root directory on the CD, and click Open.

- 6 Click OK to run.

Result: The program displays the message Setup determines that DMI is not installed on your system. Do you want Setup to install DMI?

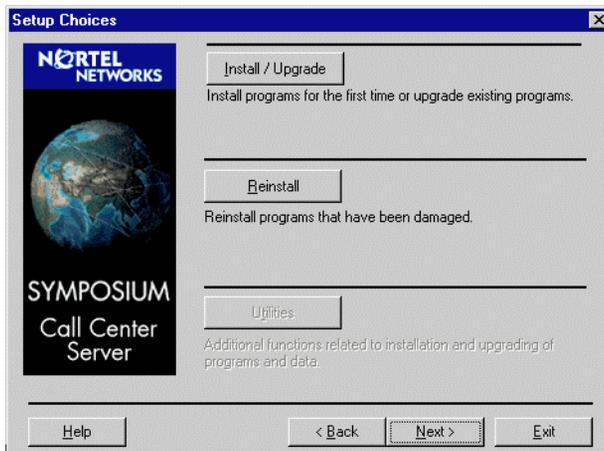
- 7 Click Yes to install the DMI. (If you click No, the installation stops.)

Result: The DMI installs and the Nortel System Operations welcome dialog box appears.



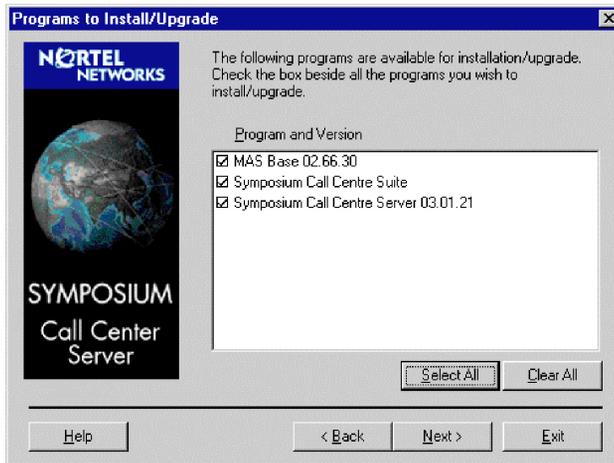
- 8 Click Next.

Result: The Setup Choices dialog box appears.

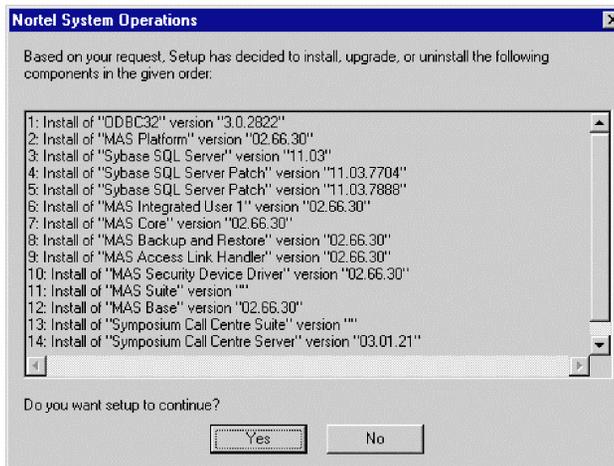


9 Click Install/Upgrade.

Result: The Programs to Install/Upgrade dialog box appears.

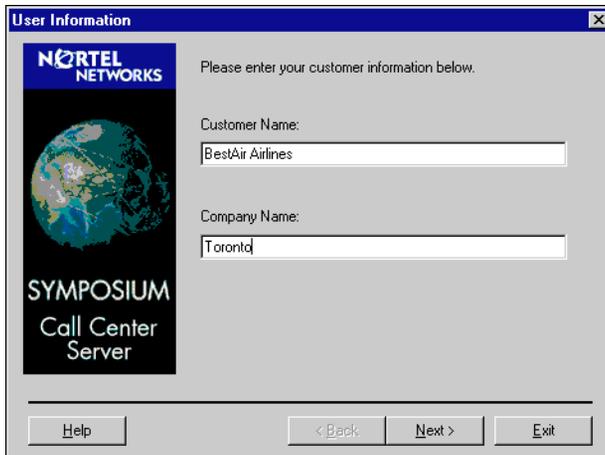
**10** Click Select All, and then click Next.

Result: A list of components to install or upgrade appears in a Nortel System Operations dialog box.

**11** Click Yes and follow screen instructions.

- 12 If a warning message appears because a text printer is not found, then click OK to bypass the warning. For details, see “Bypass the fault printer warning if it appears” on page 95.
- 13 If a warning message appears because drive D has less than 512 Mbytes free, click Yes to continue.

Result: Setup copies files to the server, and then the User Information dialog box appears.



- 14 Enter the customer and company names, as recorded in Worksheets from Chapter 2, and then click Next.

Result: The program installs the software and displays the message Setup is about to reboot the system. Please continue installation after reboot.

- 15 Click OK.

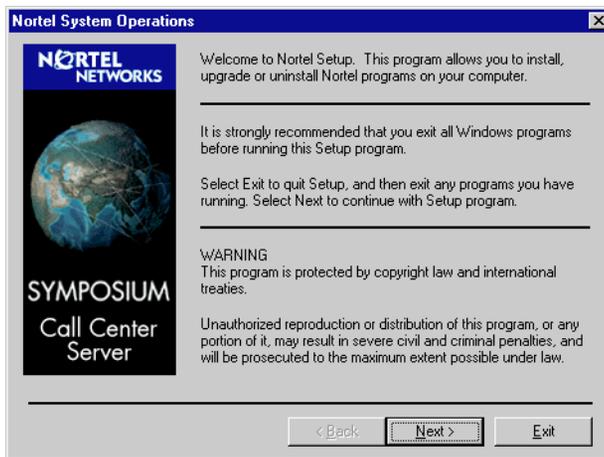
Result: The system restarts and logs on again automatically.

To install the MAS server software

- 1 Exit all applications, including screen savers, and close all windows.
- 2 From the Windows Start menu, choose Run.
- 3 Click Browse, select Setup.exe from the root directory on the CD, and click Open.

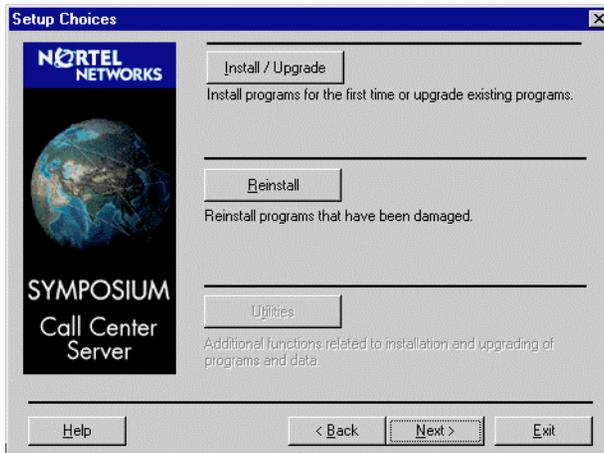
- 4 Click OK to run.

Result: The Nortel System Operations welcome dialog box appears.



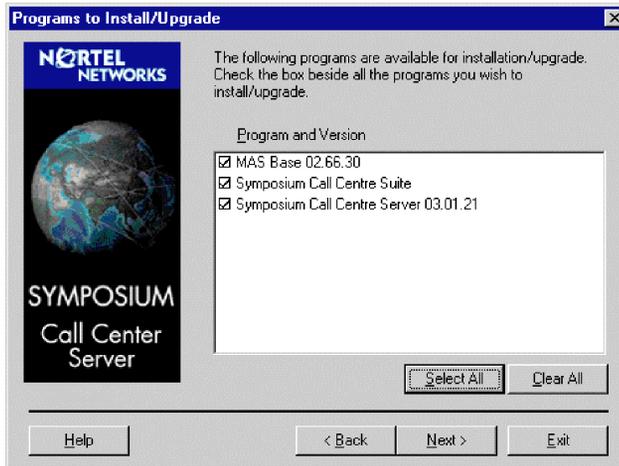
- 5 Click Next.

Result: The Setup Choices dialog box appears.



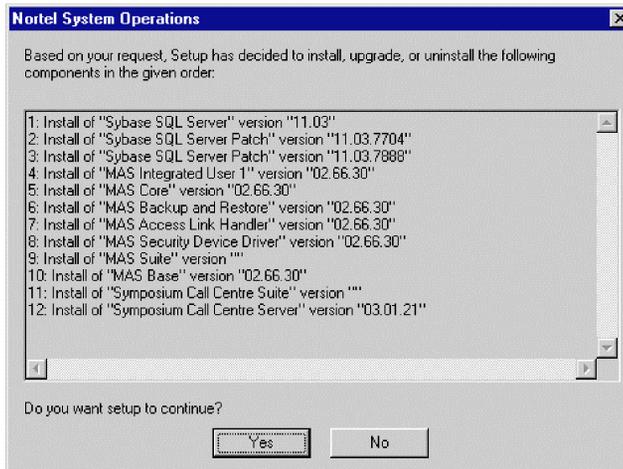
6 Click Install/Upgrade.

Result: Setup examines the system, and the Programs to Install/Upgrade dialog box appears.



7 Click Select All, and then click Next.

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

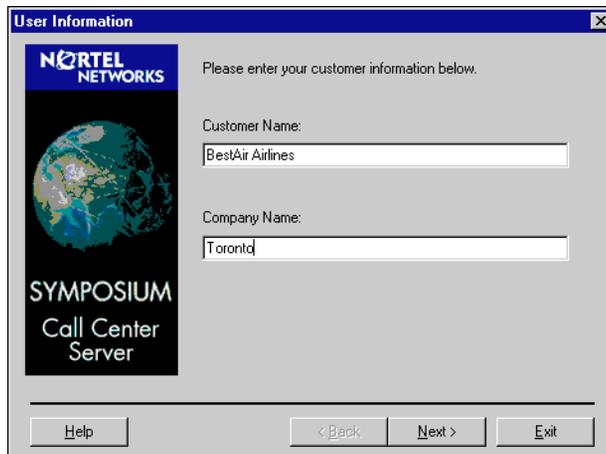


8 Click Yes.**Notes:**

- If a warning message appears because a text printer is not found, then click OK to bypass the warning. For details, see “Bypass the fault printer warning if it appears” on page 95.
- If the following message appears, then click Yes to continue:

Setup has found out that this drive “C:\” has less than 64 Mbytes of free space. Do you still want to continue?”

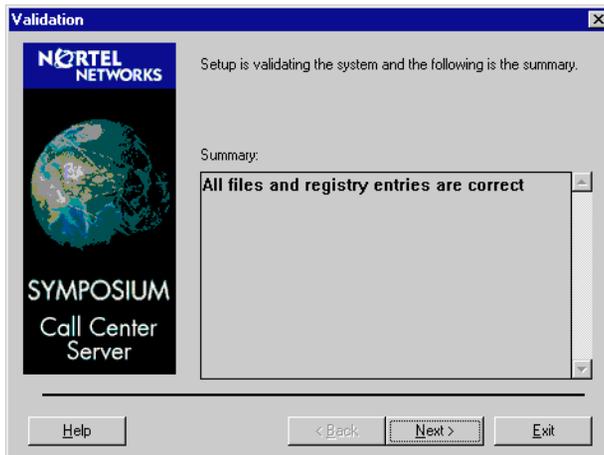
Result: Setup copies files to the server, and then the User Information dialog box appears.



The image shows a Windows-style dialog box titled "User Information". On the left side, there is a logo for "NORTEL NETWORKS" above a globe, and below that, the text "SYMPOSIUM Call Center Server". The main area of the dialog box contains the instruction "Please enter your customer information below." followed by two input fields: "Customer Name:" with the text "BestAir Airlines" and "Company Name:" with the text "Torontd". At the bottom of the dialog box, there are four buttons: "Help", "< Back", "Next >", and "Exit".

- 9 Ensure that the customer and company names are correct, and then click Next.

Result: The MAS server software installs and the Validation dialog box appears. This process takes approximately 30 minutes.



- 10 Click Next.

Result: The program prompts you to restart.



- 11 Click OK to restart.

To install Symposium Call Center Server software

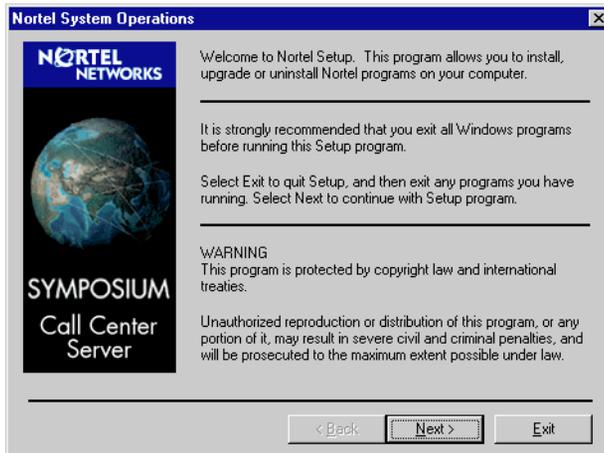
- 1 Log on to Windows NT with the username **NGenSys** and the password **__ngen!**

Note: If you do not log on using the NGenSys password, the install program in the following procedure prompts you to log on again using NGenSys.

- 2 Exit all applications, including screen savers, and close all windows.
- 3 From the Windows Start menu, choose Run.

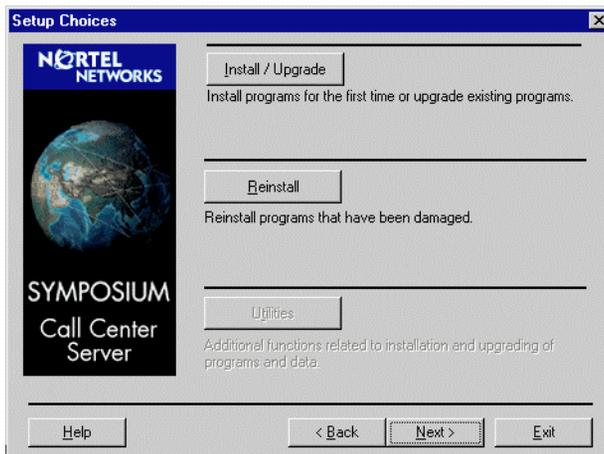
- 4 Click Browse, select Setup.exe from the root directory on the CD, and click Open.
- 5 Click OK to run.

Result: The Nortel System Operations welcome dialog box appears.



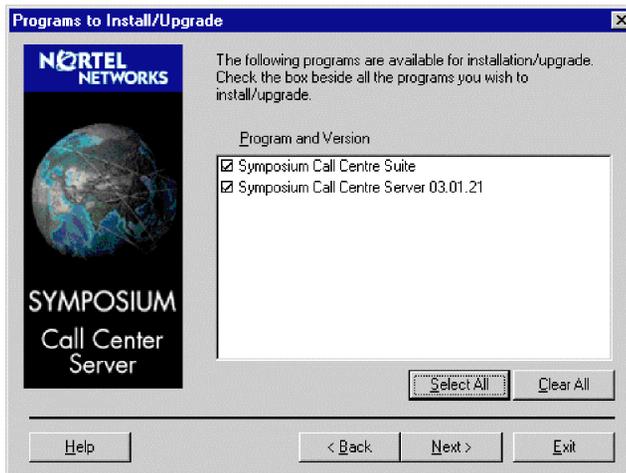
- 6 Click Next.

Result: The Setup Choices dialog box appears.



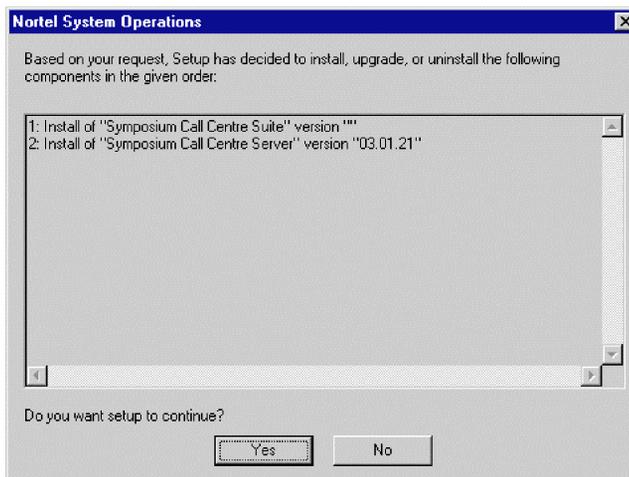
7 Click Install/Upgrade.

Result: Setup examines the system, and the Programs to Install/Upgrade dialog box appears.



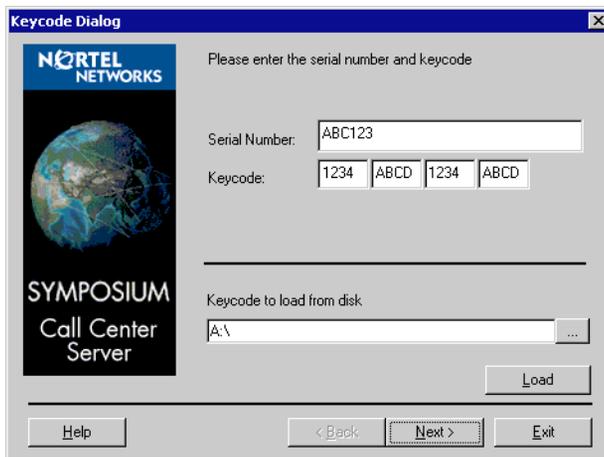
8 Click Select All, and then click Next.

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



9 Click Yes.

Result: The Keycode Dialog box appears.



10 For DMS switch systems only, ensure that the Symposium Call Center Server has a dongle that matches the serial number before connecting to the switch.

Note: The dongle is not necessary for installing or testing.

11 Enter your keycode in one of the following ways:

- If you have a disk that contains your keycode information, follow these steps:
 - a. Insert the keycode disk into the floppy drive.
 - b. Click the (...) button to open a browse dialog box.
 - c. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial numbers are entered into the Keycode Dialog box.

- If your keycode information is stored on a hard disk, follow these steps:
 - a. Click the (...) button to open a browse dialog box.
 - b. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial number are entered into the Keycode Dialog box.

- Type your serial and keycode numbers in the appropriate fields.

Note: The NCC keycode, if entered, must match the switch serial number.

- 12 Click Next.

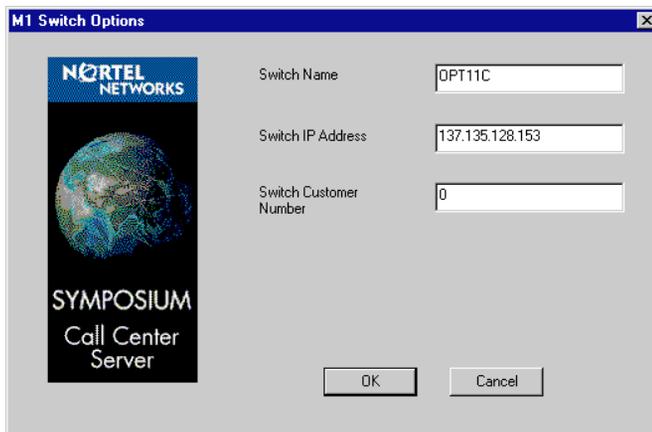
Result: The Verify Keycode Information dialog box appears.

- 13 Check that all keycode information is correct. If it is not correct, then click Back to change it. Otherwise, click Next.

Result: Based on the system type that you are installing, one of the following switch information dialog boxes appears.

Note: If you are installing a Network Control Center (NCC) server, a switch information dialog box does not appear.

M1 Switch Options dialog box



M1 Switch Options

NORTEL NETWORKS

Switch Name: OPT11C

Switch IP Address: 137.135.128.153

Switch Customer Number: 0

SYMPOSIUM
Call Center
Server

OK Cancel

DMS Switch Configuration dialog box

DMS Switch Configuration

Please fill in the switch parameters

NORTEL NETWORKS
SYMPOSIUM
 Call Center Server

Switch Name:

Switch IP Address:

Network Node:

Service ID:

Application ID:

Service Version:

Business Group:

Linkset Name:

Password:

Confirm Password:

< Back Next >

Note: The MSL Switch Configuration dialog box is the same as the DMS Switch Configuration dialog box, except for the switch information.

- 14** Enter the appropriate information for your switch. Refer to the information you entered in Chapter 2, “Worksheets and checklists.”

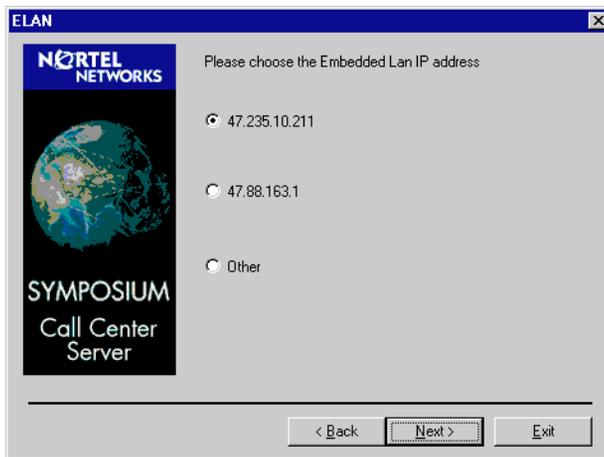
Note: The following restrictions apply to switch names:

- Valid characters for switch names are A–Z, a–z, 0–9, _ (underscore) and . (period).
- Switch names must begin with an alphabetic character, and cannot contain spaces.
- The last character must not be an underscore or a period.
- Switch names must not exceed 80 characters in length.

Tip: If you are unsure of the correct information or if you make a mistake, you can change the switch information after you finish the installation (see “Feature Report: Switch Information” on page 269).

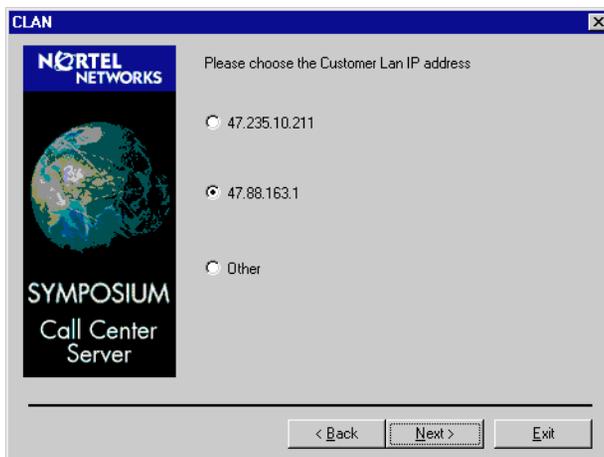
15 Click Next.

Result: The ELAN dialog box appears.

**16** Enter the ELAN TCP/IP address for the server in one of the following ways:

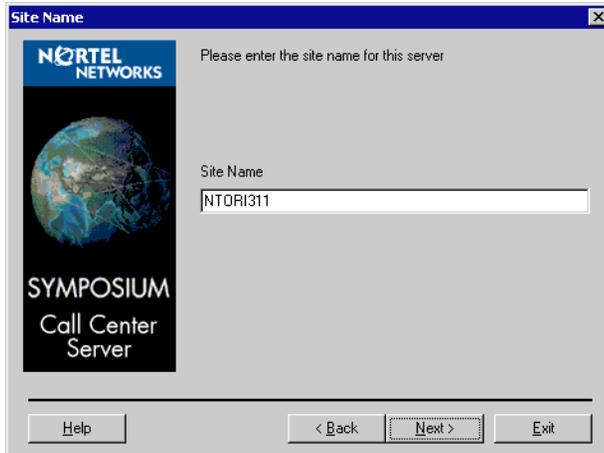
- If the address appears in the dialog box, select it and click Next.
- If the ELAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

Result: The CLAN dialog box appears.



- 17 Enter the CLAN TCP/IP address for the server in one of the following ways:
- If the address appears in the dialog box, select it and click Next.
 - If the CLAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

Result: The Site Name dialog box appears.

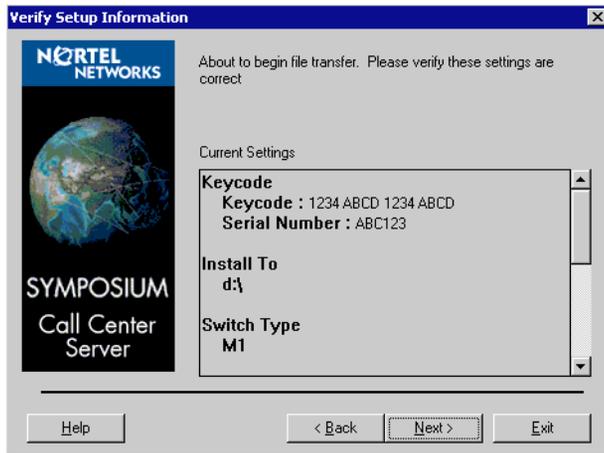


- 18 Enter a site name for the server. Refer to the information you entered in Chapter 2, “Worksheets and checklists.”

Tip: The site name must be unique and can consist of any combination of up to 21 characters. Do not use the \ (backslash) character.

19 Click Next.

Result: The Verify Setup Information dialog box appears, similar to the following example:



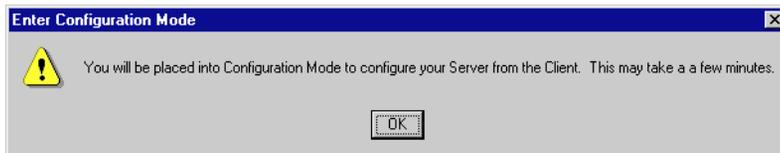
20 Examine the list of current settings. If they are incorrect, click Back, make the necessary corrections, and click Next.

21 Click Next.

Result: The program begins copying files to the hard disk drive and a progress bar appears.

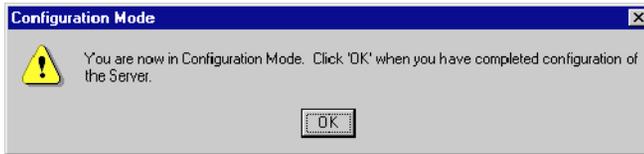
Note: Initializing the database files can take from one to three hours.

When this step is completed, the Enter Configuration Mode message appears.



22 Click OK.

Result: The setup program validates scripts and puts the server into configuration mode.

**ATTENTION**

Do not click OK at this time.

Note: Configuration Mode shuts down certain services that take the server offline from the switch. This enables you to configure the server before allowing outside calls to access the server. If this is not required for your installation, click OK to continue the server installation.

23 Go to a client PC and perform the following procedures:

- a. Install the Symposium Call Center Server client software on a client PC (see Chapter 6, “Installing the client software”).
- b. Add an SMI system (see Chapter 7, “Adding a System Management Interface system”).
- c. Configure the server from the client while the server is still in Configuration Mode.

Note: Nortel Networks recommends that you configure the server while it is offline from the switch. If you do not want to configure the server while it is offline, you can configure it after you finish the server software installation.

24 Return to the server PC and click OK.

Result: The Reboot dialog box appears.

25 Select Reboot now, and then click Next.**26** After the server restarts, press Ctrl-Alt-Delete to log on.**27** Log on as NGenSys.

Result: The SMonW window appears and Symposium Call Center Server services begin the startup process. The services take approximately 15 to 20 minutes to start up. For more information about the services and their statuses, see “Troubleshooting problems with Symposium Call Center Server services” on page 292.

The server software is now completely installed.

Checking for PEPs

Extract and install the latest available software PEPs now. For more information, see “Installing PEPs and Service Update packs” on page 119.

To create a Platform Recovery disk

- 1 Insert a disk into the floppy drive.
- 2 From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.
- 3 Select Dump system information to floppy disk and click Continue.
Result: The program prompts you to insert a disk.
- 4 Click OK.
Result: The program saves the configuration to the disk, and displays messages telling you that the save is complete.
- 5 Click OK in response to these messages.
Result: The program prompts you to remove the disk.
- 6 Click OK.
- 7 Label the disk with “Platform Recovery Disk” and the current date, and store it in a safe place.

Backing up the server

Create full, database, and (if applicable) RAID backups of the server. For detailed instructions, refer to the backup procedure in the *Administrator's Guide*.

What's next?

Continue with “Changing the NGenDist and NGenDesign passwords” on page 114.

Changing the NGenDist and NGenDesign passwords

Introduction

NGenDist and NGenDesign are Windows NT remote access accounts that enable the distributor or Nortel Networks Customer Support to remotely log on to the server if requested by the customer. These accounts are created during the server software installation. To ensure server security, change the NGenDist and NGenDesign passwords.

To assign new passwords, you do not need to know the default passwords for NGenDist and NGenDesign.

Password recommendations

When you change passwords, Nortel Networks recommends that they meet the following requirements:

- Each password should be six to ten characters long.
- Each password should contain at least one number.
- Each password should not contain common words or nouns.

Example

The following password example meets all of these recommendations:
xyd45fst

Password security

Write down the new passwords you create, and store them in a safe, secure place away from the server. Give the passwords only to those who need them.

To change the NGenDist and NGenDesign passwords

Note: You are not required to change the NGenSys password. If you change the NGenSys password, you must apply the same password change to the MAS Backup/Restore service (see the following procedure).

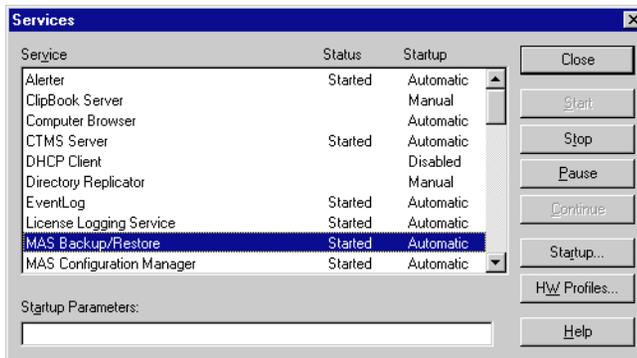
- 1 Log on to Windows NT as NGenSys.
- 2 From the Windows Start menu, choose Programs → Administrative Tools (Common) → User Manager for Domains.
Result: The User Manager window displays a list of available user accounts, including NGenDist and NGenDesign.
- 3 Double-click the NGenDist icon.
Result: The User Properties property page appears.
- 4 In the Password field, type the new password. Ensure that you use a password that contains a combination of numbers and letters (see “Password recommendations” on page 114).
- 5 In the Confirm Password field, type the same password entered in the Password field.
- 6 Click OK to close the User Properties property page.
- 7 Repeat steps 3 to 6 for NGenDesign.
- 8 Select Exit to save changes.
- 9 Record these passwords and store them in a safe, secure place away from the server.

To change the NGenSys password for MAS Backup/Restore service

Note: Complete this procedure only if you change the Windows NT user account password for NGenSys.

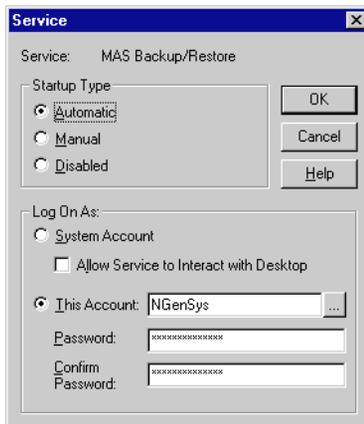
- 1 From the Windows Start menu, choose Settings → Control Panel.
- 2 Double-click Services.

Result: The Services dialog box appears.



- 3 Scroll to MAS Backup/Restore service, and then select it.
- 4 Click Startup.

Result: The Service dialog box appears.



- 5 In the Log On As section, fill in the Password and Confirm Password boxes with the current NGenSys password. Use the same password that you

assigned to NGenSys in “To change the NGenDist and NGenDesign passwords” on page 115.

What’s next?

Continue with “Post-installation checklist” on page 118.

Post-installation checklist

To verify the success of the installation

On the server PC

- 1 Log on to Windows NT as NGenSys.
- 2 Check that all Symposium Call Center services are running. Restore the SMonW window from the TaskBar and check that all services are in the UP state.

Note: It can take 15 minutes or more for the system to come up and for all of the services to start. If all services do not start, check that the PC is connected to the switch. Perform a security check to verify that the proper switch ID is assigned to Symposium services coming online.

- 3 If you are connecting to a DMS/MSL-100 switch, make sure that the correct dongle is attached to the parallel port on the server.
- 4 Check the Windows NT Event Viewer again to be sure that no errors occurred during the restart.

On the client PC

After a successful installation, log on from a client PC and verify that the historical statistics match the installed disk space and customer requirements.

To update the emergency repair disk

After you make changes to the server, update the emergency repair disk to record the latest configuration data. Follow the instructions in "Updating the emergency repair disk" on page 68.

Installing PEPs and Service Update packs

Introduction

PEPs (Product Enhancement Packages) are small software updates that are installed on the Symposium Call Center Server or client. PEPs contain product enhancements and bug fixes and are required to ensure smooth operation of your system.

PEPs and Service Updates are available on the PEP CD shipped with your software and from your Nortel Networks Customer Support representative.

Periodically individual PEPs are consolidated into Service Update packs or “super PEPs.” Service Update packs are installed in the same way as PEPs, although they can take longer to download because they are larger. There are normally two service update packs: one for the client and one for the server.

When you install the software (or upgrade to a new version), you should install the latest service update pack on the server and on the client. If no service update pack is available, check with your Nortel Networks Customer Support representative.

To install PEPs or Service Update packs on the server or client PC

Notes:

- If your server is a RAID system, you can split the RAID drives before installing the PEPs or Service Update packs. After installing the PEPs or Service Update packs, allow the server to run in split mode until you are confident that the procedure was successful. Then rebuild the RAID drives.
 - If you are performing a conversion or upgrade and you have already split the RAID drives, do not rebuild the RAID drives until the conversion or upgrade process is finished.
- 1 Log on to Windows NT as NGenSys.
 - 2 Shut down all applications, including screen savers.
 - 3 Insert the PEP CD into the CD-ROM drive or download the PEP or Service Update electronically.

- 4 Locate the PEP directory on the CD.

Example: For the PEP named NS030121G001S, the path might be E:\03.01.21\PEPs\NS030121G001S, where

Code	Meaning
NS	Nortel Networks Symposium Call Center Server
030121	Build number of Symposium Call Center Server software
G	General Release (Other options include SU=Service Update, L=Limited, and R=Restricted.)
001	the PEP number
S	a server PC PEP (Other options include C=Client.)

- 5 Check the readme file in the PEP directory for any special instructions or dependencies before installing the PEP.

- 6 Double-click the file runme.exe, and then follow the screen instructions.

Result: The PEP installer wizard verifies that the PEP can be installed successfully. The PEP installer then shuts down and restarts the server. For PEPs installed on the client PC, the PEP installer checks that no Symposium Call Center Server services are currently running. This process takes several minutes. The client PC is not shut down. The PEP is installed on the PC and all updated files are backed up.

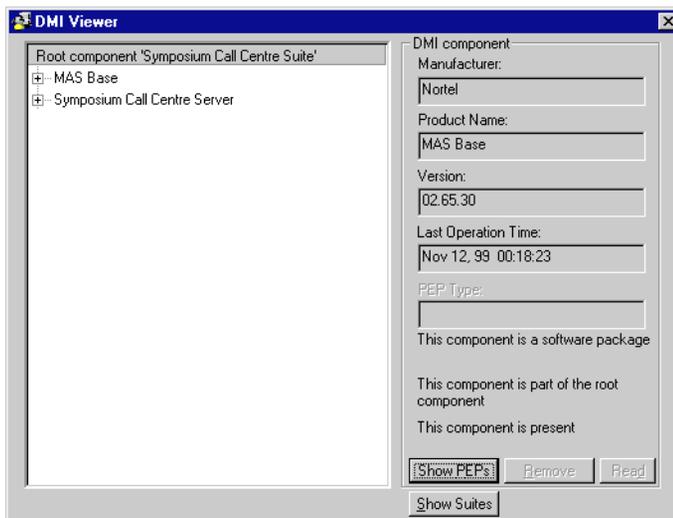
Note: If the PEP installer detects that the PEP cannot be installed successfully, contact your Nortel Networks Customer Support representative for assistance.

Uninstalling PEPs

To uninstall PEPs from the server or client

- 1 Log on to Windows NT as NGenSys.
- 2 Start the DMI View utility by choosing, From the Windows Start menu, choose Programs → Symposium Call Center Server → DMI View.

Result: The DMI Viewer window appears.



- 3 Click Show PEPs.
- 4 Select the PEP you want to uninstall.
- 5 Click Remove.

Result: The utility removes the PEP and prompts you to restart.

- 6 Click OK to restart the server PC.

Uninstalling server software

Introduction

Uninstall the server software when you want to use the server PC for another purpose. If you must do a fresh install of the current server software, then uninstall the server software first.

ATTENTION

Do not uninstall the server software before a software upgrade.

Checklist for uninstalling server software

Steps	✓
Obtain the current password for the NGenSys account.	
Establish a connection to the server by attaching a keyboard and monitor, or by using pcANYWHERE32. See page 91.	
Uninstall the server software. See page 122.	
Uninstall the Desktop Management Interface (DMI). See page 123.	

To uninstall server software

- 1 Log on to Windows NT as NGenSys.
- 2 From the Windows Start menu, choose Programs → Symposium Call Center Server → uninstall.

Result: Setup examines the system, and the Uninstall Programs dialog box appears. This dialog box lists all programs available to be uninstalled.

Note: The list contains all Performance Enhancement Packages (PEPs) installed on the server. Ensure that all PEPs are selected for uninstallation.

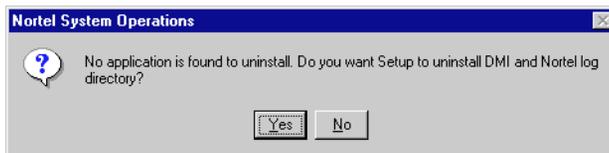
- 3 Click Select All, and then click Next.

Result: The Nortel System Operations dialog box appears and lists all of the components in the order in which they will be uninstalled.

- 4 Click Yes.
Result: A confirmation prompt appears.
- 5 Click Yes.
Result: A summary of the uninstall appears.
- 6 Click OK.
Result: The system prompts you to restart.
- 7 If the uninstall has completed successfully, click No (do not restart the server at this time). You can now uninstall DMI. Continue with the following procedure.
Note: If you encounter a problem during the uninstall, then do not uninstall the DMI. The DMI is not automatically uninstalled during the uninstallation process because all logs, which can be used by Customer Technical Support to troubleshoot problems, are deleted when the DMI is uninstalled.

To uninstall the DMI

- 1 From the Windows Start menu, choose Programs → Symposium Call Center Server → uninstall.
Result: The following prompt appears.



- 2 Click Yes.
Result: A summary of the uninstall appears.
- 3 Click OK.
Result: The setup program prompts you to restart.

- 4 Click OK to restart.

Result: The server software is now completely uninstalled.

ATTENTION

Make sure that all the Nortel folders and subfolders in each of the local drives are removed. Remove them manually if they still exist.

Chapter 6

Installing the client software

In this chapter

Checklist for installing Symposium Call Center Server client software	126
Limitations	127
Uninstalling the Software Development Kit	128
Checking the temp directory size	129
Installing the client from the distribution CD	130
Installing the client over the network	141
Uninstalling the client software	146
Installing the Software Development Kit	150

Checklist for installing Symposium Call Center Server client software

Step	✓
Obtain the user ID and password that you need to log on to the client PC. On a Windows NT client PC, you need an account that has local administrative privileges.	
Review the requirements in the checklist on page 18.	
Review the limitations on page 127.	
Uninstall the Software Development Kit (SDK), if it is installed. See page 128.	
Ensure that the temp directory has enough space. See page 129.	
Check the “Things to remember” section on page 130.	
If you are installing across a network, create a virtual CD. See page 142.	
Install the Symposium Call Center Server client software. <ul style="list-style-type: none"> ■ If you are installing from a CD, see page 130. ■ If you are installing across a network, see page 145. 	
Install PEPs if a PEP CD was provided. See page 141.	

Notes:

- If you will be using Crystal Reports on the client PC, you must install it before you install the client.
- If Sybase Open Client is installed on the client PC, you must uninstall it before installing the client.

Limitations

Number of clients

The Server keycode determines the number of clients that can simultaneously connect to the server. The number of installed clients can exceed the number of licensed clients, although only the licensed number can connect to the server at any one time.

Coexistence with MAT

Supported combinations

The Symposium Call Center Server client application, Release 3.0, can reside on the same PC as MAT 6.53.

Note: When you uninstall MAT, the installation program replaces ODBC files with an older version. If you uninstall MAT, you must reinstall the Symposium Call Center Server client.

Unsupported combinations

The Symposium Call Center Server client application cannot reside on the same PC as

- earlier versions of MAT
- earlier versions of the Symposium Call Center Server client application
- Symposium Express Call Center client application

Note: If you must use the same PC for more than one of these applications, you can use a third-party application to partition the PC hard disk and install multiple copies of Microsoft Windows. Install a separate application on each partition. When you want to use an application, start with the appropriate partition.

Coexistence with Sybase Open Client

The Symposium Call Center Server client application uses its own version of the Sybase Open Client software. It cannot be installed on a PC that already contains Sybase. (This is a Sybase limitation.)

Uninstalling the Software Development Kit

Introduction

Before you install client software, you must ensure that a Software Development Kit (SDK) is not installed on the client PC. SDK and Symposium Call Center Server are not compatible. Use the procedures in this section to check whether SDK is installed, and then to uninstall it if it is present.

To check if SDK is installed

- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to perform these procedures.

- 2 From the Start menu, choose Run.
- 3 Click Browse, and find and select dmi_view in the Nortel_Log directory. Nortel_Log is located under c:\ if the directory was created at the default location during client installation.
- 4 Click OK.

Result: The system displays all Nortel Networks applications. If SDK is in the list, follow the steps in the following procedure.

- 5 Close the DMI Viewer dialog box to exit.

To uninstall SDK

- 1 Ensure that all applications on the client PC are closed.
- 2 From the Windows Start menu, choose Programs → Symposium Call Center Server → Uninstall.
- 3 Follow the instructions on the screen.

Checking the temp directory size

Purpose

Use this procedure to ensure that you have at least 50 Mbytes of free hard disk space in the temp directory and that temporary files do not create a disk space problem. The client software requires 50 Mbytes of free space.

To check the amount of free space in the temp directory

- 1 Log on to the client PC.
- 2 From the Windows Start menu, choose Programs → Command Prompt.
- 3 At the prompt, type **dir**.
Result: The contents of the current directory are displayed, along with a summary of free disk space.
- 4 Check the amount of free disk space that appears on the last line:
 - If the free disk space summary shows more than 50 Mbytes, then you can proceed with installing the client software.
 - If the free disk space summary shows less than 50 Mbytes of free disk space, then remove unnecessary data or programs from the PC until you have at least 50 Mbytes of free disk space.

To delete temporary files

You should delete temporary files on a regular basis. This avoids potential disk space problems caused by the accumulation of large temporary files created from generating reports and from other client activities. To delete temporary files, follow these steps.

- 1 From Windows Explorer, navigate to your system's temporary directory.
Note: The usual path to this directory is C:\Windows\Temp.
- 2 Select and then delete all files in the temporary directory.
- 3 From Windows Explorer, navigate to the Recycle Bin and choose File → Empty Recycle Bin.

Installing the client from the distribution CD

Introduction

Follow the procedure in this section to install the Symposium Call Center Server client software.

Timing

The procedures in this chapter take approximately one hour to complete.

Before you begin

- If the Software Development Kit (SDK) is installed on the client PC, uninstall it following the instructions in “Uninstalling the Software Development Kit” on page 128.
- If Sybase Open Client is installed on the client PC, you must uninstall it before installing the client software.
- If you will be using Crystal Reports on the client PC (to create customized reports), you must install Crystal Reports before the client software.

Things to remember

Follow the steps in the installation checklist

See “Checklist for installing Symposium Call Center Server client software” on page 126.

Update DLL files

During the installation, you might see dialog boxes that offer to update system DLL files with newer versions. Write down the names of these DLL files. If the files being installed are newer than the existing versions, click Yes. If they are older, click No. Provide the list of replaced DLLs to the system administrator.

Install the Desktop Management Interface

If you are prompted to install the Desktop Management Interface (DMI), click Yes to install it. The DMI is part of the client software. If the DMI is already installed, you are not asked to install it again.

Install Acrobat Reader 3.0 with search plug-in

The procedure for installing the client includes steps to install Acrobat Reader 3.0. This Acrobat Reader 3.0 version includes the search plug-in. The search plug-in provides the capability to search for keywords across the suite of online reference guides.

If you follow the steps in this installation procedure, the installation program automatically installs Acrobat Reader 3.0.

If Acrobat Reader 3.0 or higher is already installed on the client PC, and you already have the search plug-in (Asrch32.api) installed, you need not replace it.

Uninstall client software to change the switch type

The Symposium Call Center Server client PC can connect to only one switch type. To change to another switch type, you must completely uninstall the client system software, and then reinstall it with the correct switch type.

To start the client installation

ATTENTION

During the installation, there are points where the setup program performs automatic installation steps between wizard setup dialog boxes. Do not close any windows that appear during these steps. Wait for the next wizard setup dialog box before you use the mouse or keyboard.

If you abort the installation at any time, you must uninstall all of the components before you reinstall.

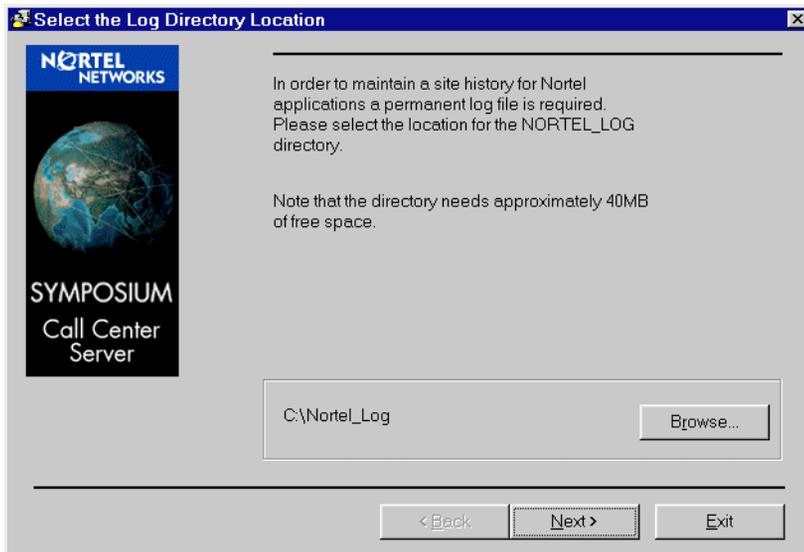
- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to install, upgrade, or convert Symposium Call Center Server software.

- 2 Exit all applications, including screen savers, and close all windows.

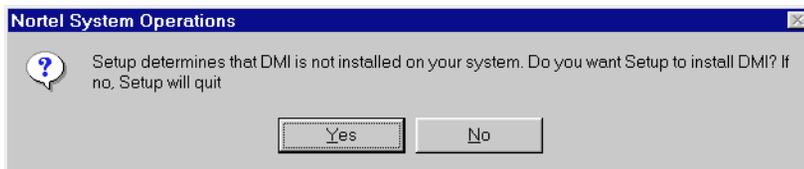
- 3 Insert the Client installation CD or, if you are installing from a remote CD-ROM, map the client installation CD to a drive letter on the client PC.
- 4 Click Browse, and then select Setup.exe from the root directory on the CD.
- 5 Click OK to run.

Result: The Select the Log Directory Location dialog box appears.



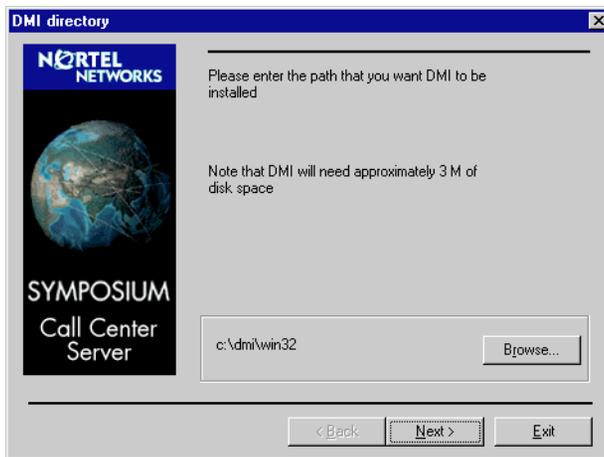
- 6 If you do not want to install in the default path C:\Nortel_Log, click Browse and select another drive.
- 7 Click Next.

Result: If DMI is already installed on the system, the Nortel System Operations Welcome dialog box appears. Skip to step 11. If DMI is not already installed on the system, the following dialog box appears.



- 8 Click Yes to install the DMI.

Result: The DMI directory dialog box appears.



- 9 If you do not want to install in the default path, click Browse and select the new path.
- 10 Click Next.

Result: The DMI installs in approximately one minute, and then the Welcome dialog box appears.

ATTENTION

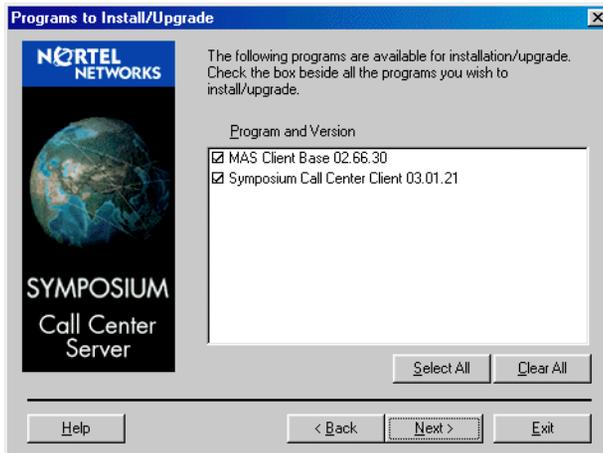
Do not use the keyboard or mouse while the DMI is being installed, as they can cause the installation to fail.

- 11 Click Next.

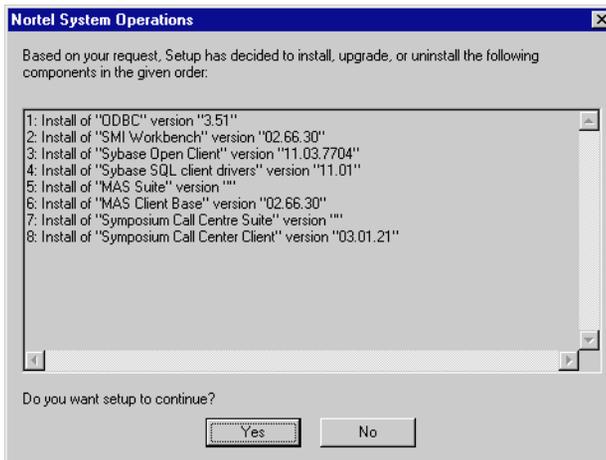
Result: The Setup Choices dialog box appears.

12 Click Install/Upgrade.

Result: Setup examines the system, and the Programs to Install/Upgrade dialog box appears.

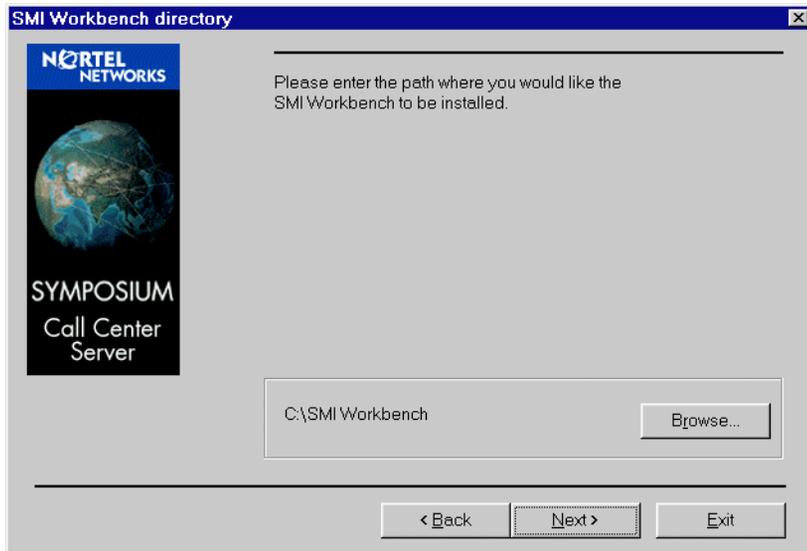
**13** Click Select All, and then click Next.

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

**14** Click Yes.

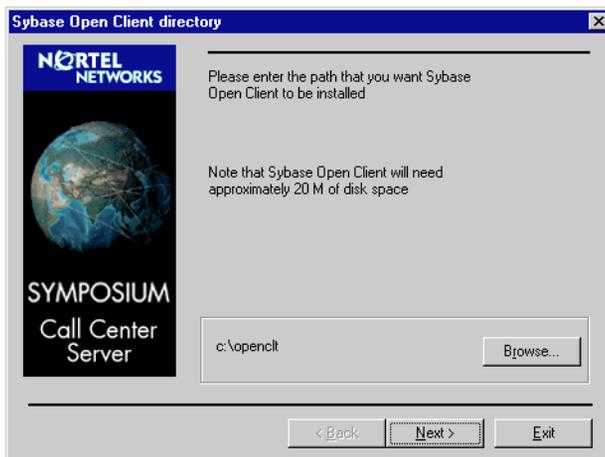
Result: The SMI Workbench directory dialog box appears.

- 15 If you do not want to install the SMI Workbench in the default path, click Browse and type the new path.



- 16 Click Next.

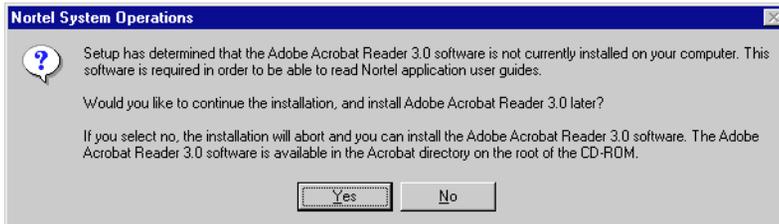
Result: The Sybase Open Client directory dialog box appears.



- 17 If you do not want to install the Sybase Open Client in the default path, click Browse and type the new path.

18 Click Next.

Result: The setup program checks to see if the required version of Adobe Acrobat Reader is installed. If it is not installed, the following dialog box appears. Continue with the following step. If it is installed, skip to step 21.

**19** Click Yes and follow screen instructions until the installation wizard notifies you that Acrobat has been installed.**20** Click Yes to continue the installation.

Result: The User Information dialog box appears.

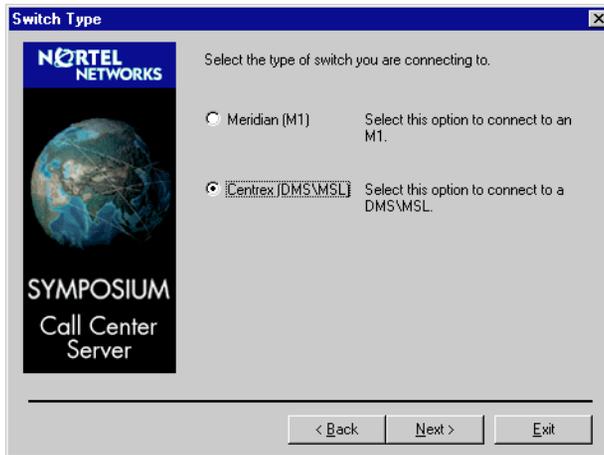
**21** Enter the Customer Name and Company Name, and then click Next.

Result: The Symposium Call Center Server (client) directory dialog box appears, showing the default path C:\Nortel.

22 If you do not want to install the Symposium Call Center Server client in the default path, click Browse and type the new path.

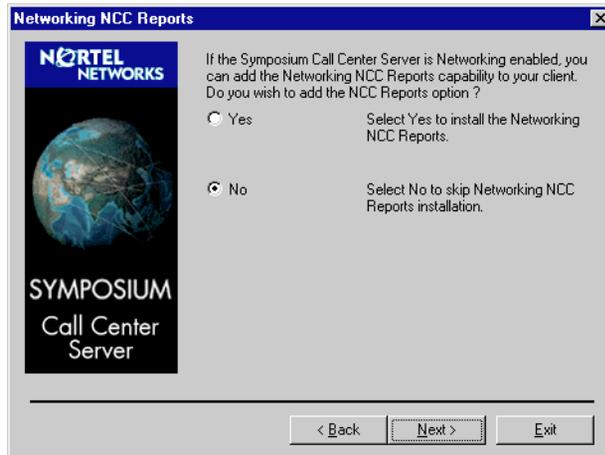
23 Click Next.

Result: The Switch Type dialog box appears.

**24** Select the switch type for this client PC to connect to, and then click Next.

Result:

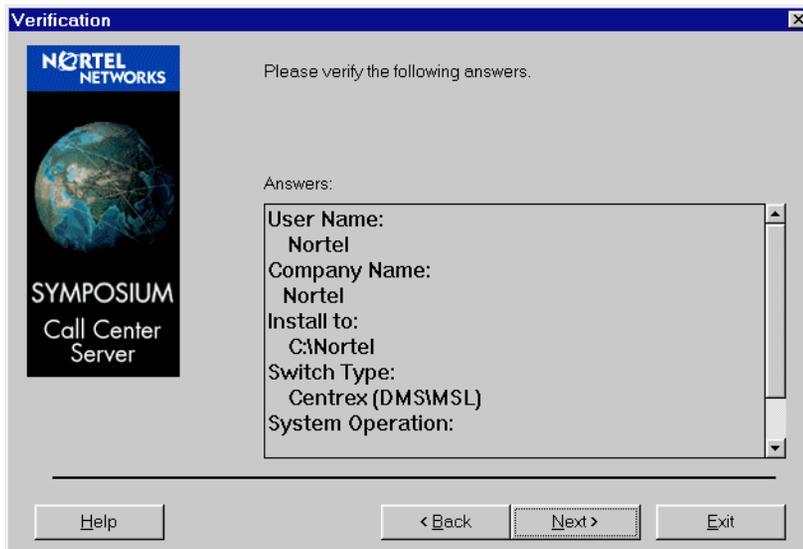
- If you choose Centrex (DMS/MSL), or if you choose Meridian (M1) and network skill-based routing is not enabled, the Verification dialog box appears.
- If you choose Meridian (M1), and if the network skill-based routing is enabled, then the Networking NCC Reports dialog box appears. This dialog box gives you the option to add NCC reporting capabilities.



Choose Yes to install NCC Reports and No, the default, to not install NCC Reports.

Result: The Verification dialog box appears.

Note: Installing NCC Reports capabilities is available only from this dialog box. If you later elect to install NCC Reports, then you must choose the reinstall option as described in "To reinstall NCC Reports (Meridian 1 only)" on page 247.

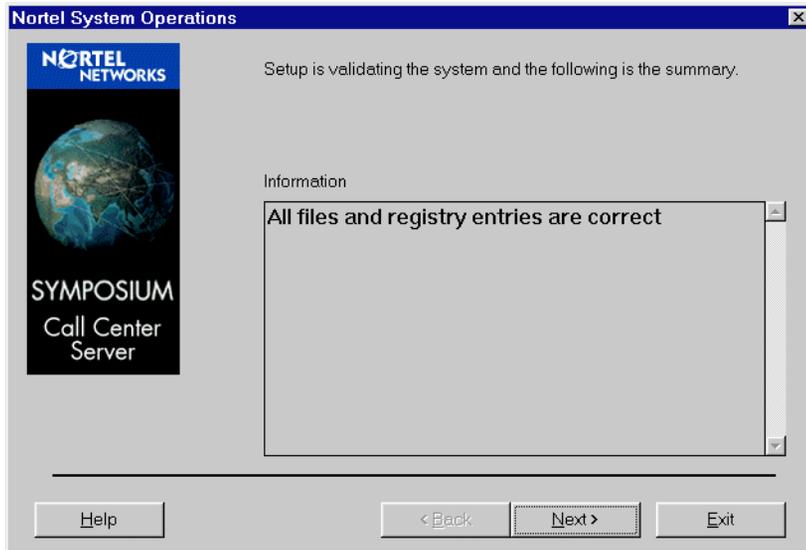


- 25 Verify that all of the options showing in the Verification dialog box are correct. If any errors appear, click Back, make the necessary corrections, and then click Next.
- 26 Click Next.

Result: Setup installs the listed components. This takes approximately 15 minutes. When the installation has completed, the Nortel System Operations validation summary appears.

ATTENTION

Do not use the keyboard or mouse during the installation process, as they can cause the installation to fail.



Notes:

- The following error message can appear during the ODBC installation.



If this dialog box appears, click OK, and then rerun setup.exe.

- If the message Setup has encountered an error while installing ODBC appears, contact your Nortel Networks Customer Support representative.

27 Click Next.

Result: The system asks if you want to read the readme file.

28 Choose whether you want to read the readme file. If you click Yes, then click File → Close when you are finished.

Result: The program prompts you to restart.

29 Click Yes to restart the computer.

Result: The computer restarts, and the client installation is complete. To access Symposium Call Center Server, from the Windows Start menu, choose Programs → SMI workbench.

What's next?

If you did not receive a PEP CD, then continue with Chapter 7, “Adding a System Management Interface system.” If you received a PEP CD, then install the PEP as described in “Installing PEPs and Service Update packs” on page 119.

Installing the client over the network

Introduction

If you are installing client software on several clients, it might be easier to use one source PC to host the installation CD-ROM or virtual CD. You can then map a network drive for the source PC to allow each user to run the installation program from the mapped drive.

ATTENTION

To avoid installation errors caused by excessive network loading, do not perform the network installation during peak network traffic hours.

Virtual CD

A virtual CD is a complete copy of the Symposium Call Center Server client installation CD that resides on a shared directory on the network. This CD functions in the same way as a real CD inserted into the CD drive on a client PC. It allows you to install other client PCs without a physical CD. The virtual CD is useful if you are installing in networked sites (M1 only).

Requirements

You must meet the following requirements for this type of installation:

- You need a source PC running Windows NT 4.0, with the latest service pack installed, that has
 - minimum Pentium 90 CPU
 - minimum 32 Mbytes of RAM
 - minimum 250 Mbytes of continuous space available on its hard drive
- The source PC must be dedicated to this activity, and not used for other tasks during the network installation.
- The source PC must have a working network connection and have file-sharing capabilities under Microsoft Network.

- The customer LAN (CLAN) connecting the source and client PCs must be running Microsoft Network.
- The CLAN must be stable, with a moderate traffic volume during the network installation process.

Before you begin

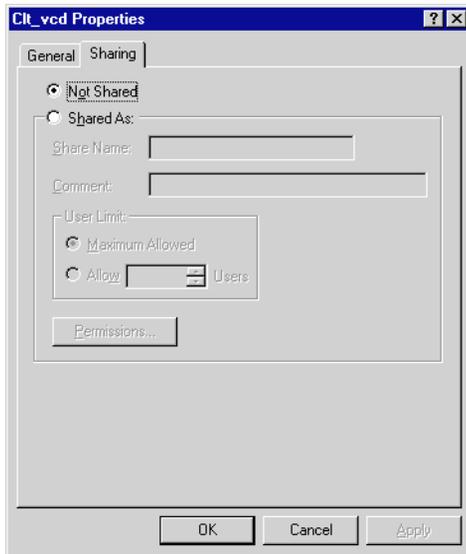
- If the Software Development Kit (SDK) is installed on the client PC, uninstall it following the instructions in “Uninstalling the Software Development Kit” on page 128.
- If Sybase Open Client is installed on the client PC, you must uninstall it before installing the client software.
- If you will be using Crystal Reports on the client PC (to create customized reports), you must install Crystal Reports before the client software.

To create a virtual CD

- 1 In Windows Explorer, select the drive on which you want to create the virtual CD (in this example, K).
- 2 Choose File → New → Folder, and create a new folder called CLT_VCD.
- 3 Insert the Nortel Networks Symposium Call Center Server Client Application CD in the CD-ROM drive (in this example, drive E).
- 4 Select the root directory of the CD, and then select all of the files in the CD.
- 5 Choose File → Copy, and copy the entire CD to the new folder (in this example, K:\CLT_VCD).
- 6 When the copy is complete, select the directory K:\CLT_VCD.

7 Choose File → Sharing.

Result: The Clt_vcd (Client Virtual CD) Properties property sheet appears.



8 Click Shared As.

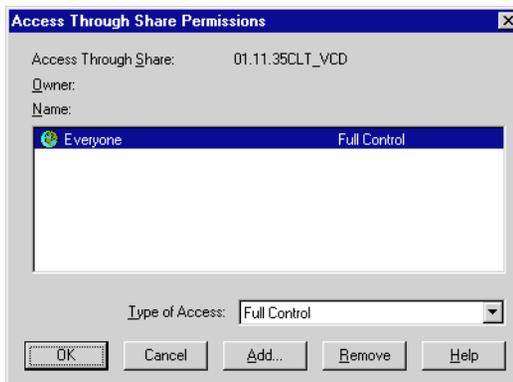
9 The Share Name and User Limit dialog boxes become active.

10 Change the Share Name from CLT_VCD to the version number of the software CLT (for example, 03.01.21CLTR).

11 For user limits, click Allow and allow no more than three users to connect at a time. You must limit the number of concurrent installation copies to ensure reasonable performance over the network.

- 12 To grant other users access to this directory, click Permissions.

Result: The Access Through Share Permissions dialog box appears.



- 13 Click Remove to remove the Everyone group.
- 14 To add names to the list, click Add and select the groups or individual users to whom you want to grant access to the virtual CD.
- 15 To remove names from the list, click Remove.
- 16 From the Type of Access list, select Read.



CAUTION

Risk of data loss

If you share with Read/Write access, users can accidentally delete the virtual CD or corrupt it.

- 17 Click OK.
- 18 Click Yes in the Windows NT message dialog box, indicating that the share name is not accessible from some MS-DOS workstations.
- 19 Click OK.

To start installation from a virtual CD

ATTENTION

The network installation uses the same recovery process as a regular installation from a physical CD. If you see an error message, click Resume to continue the installation, or click Abort and reinstall the client application.

You must map a network drive to the server and virtual CD directory (as shown in the following procedure).

- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to install, upgrade, or convert Symposium Call Center Server software.

- 2 In Windows Explorer, choose Tools → Map Network Drive.

- 3 For Path, type \\<source PC computer name>\<Share Name of the virtual CD directory>.

Example: \\TOR658\03.01.21CLTR

- 4 Click OK.

Result: The virtual CD directory is mapped as a network drive in the Windows Explorer.

- 5 Navigate to the virtual CD directory (in this example, \01.11.33CLTR), and double-click Setup.exe.

Result: The Network Installation dialog box appears.

- 6 Click Continue.

Result: The Welcome page appears.

- 7 Go to “Installing the client from the distribution CD” on page 130, and follow the steps for a regular client installation.

- 8 When you finish the client installation, choose Tools → Disconnect Network Drive to disconnect the virtual CD drive.

Result: This step allows another client PC to connect for a network installation.

Uninstalling the client software

Introduction

Uninstall the client software when you want to use the client PC for another purpose. If you must reinstall the client software, uninstall the client software first.

ATTENTION

Do not uninstall the client software before upgrading software.

Uninstallation checklist

Steps	✓
Obtain the user ID and password required to log on to the client. On a Windows NT client PC, you need an account that has local administrative privileges.	
Uninstall the client software. See page 147.	
Uninstall the DMI. See page 149.	

Things to remember

Uninstall PEPs

During the uninstallation, Performance Enhancement Packages (PEPs) are listed as components to uninstall in the Uninstall Programs dialog box. Ensure that all of the items in the dialog box are selected so that the PEPs are uninstalled.

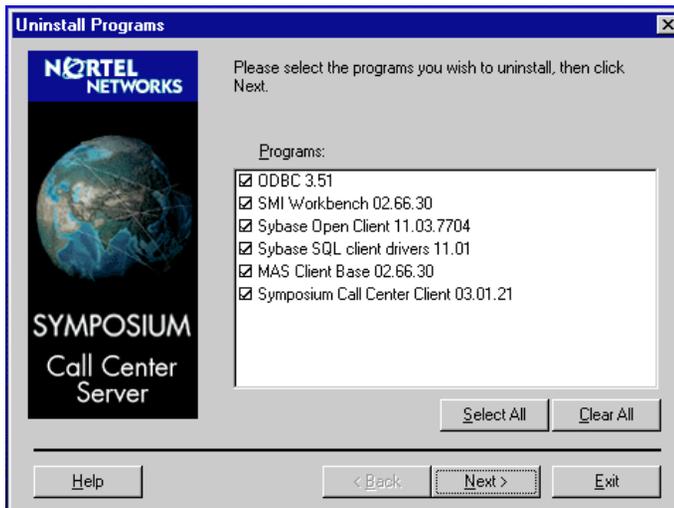
To uninstall the client software

- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to install, upgrade, or convert Symposium Call Center Server software.

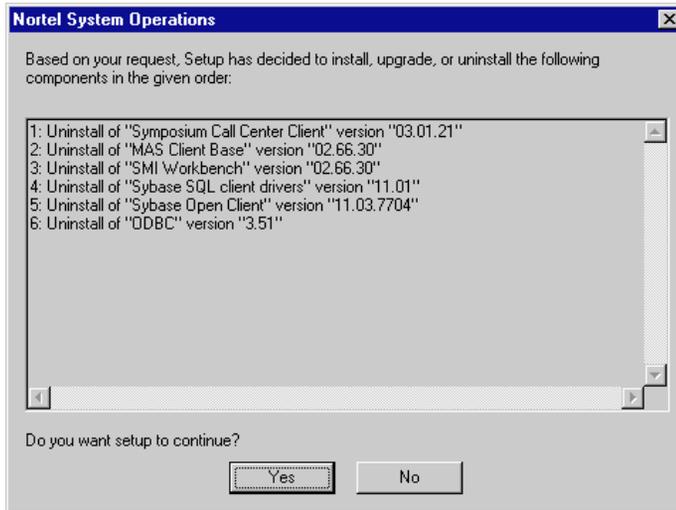
- 2 Depending on your release of Symposium Call Center Server client, do one of the following:
 - From the Windows Start menu, choose Programs → Symposium Call Center Server → Uninstall.
 - Open the Windows Control Panel (from the Windows Start menu, choose Settings → Control Panel), and double-click Add/Remove Programs. Select Symposium Call Center Server client, and click Remove.

Result: Setup examines the system, and the Uninstall Programs dialog box appears.



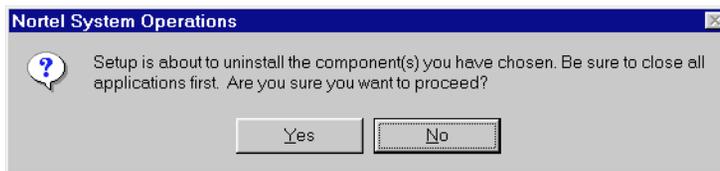
- 3 Click Select All, and then click Next.

Result: The Nortel System Operations dialog box appears and lists all of the components in the order in which they will be uninstalled.



- 4 Click Yes.

Result: A confirmation dialog box appears.

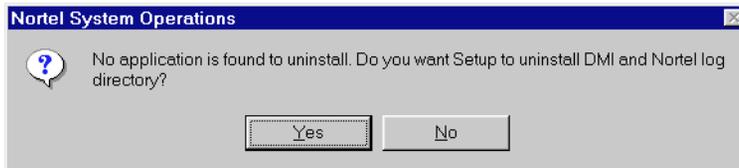


- 5 Click Yes.

Note: If any window obscures the uninstallation summary, minimize the window.

- 6 Click OK.

Result: The system asks if you want to uninstall DMI and the Nortel Log directory.



- 7 Click Yes.

Result: An uninstall summary dialog box appears.

- 8 Click OK twice to exit and restart.

Result: The system restarts and the client uninstallation is complete.

Note: If an error message regarding the uninstalling of all Symposium Call Center Server features appears, click OK.

To uninstall NCC reports (Meridian 1 only)

If you chose to install Networking NCC Reports during client installation, you can remove the NCC report templates. To remove NCC report templates, follow these steps.

- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to install, upgrade, or convert Symposium Call Center Server software.

- 2 Close down all applications, including screen savers.
- 3 From the Windows Start menu, choose Programs → Symposium Call Center Server → NCC reports removal.

Result: NCC reports are uninstalled and you are advised that NCC reports removal has been successful.

Note: NCC report templates can also be uninstalled during a regular uninstall, as described in "To uninstall the client software" on page 147.

Installing the Software Development Kit

Restrictions

The Software Development Kit (SDK) is not compatible with the Symposium Call Center Server client software. Do not install the SDK on the client PC.

To install the SDK

- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to install, upgrade, or convert Symposium Call Center Server software.

- 2 Exit all applications, including screen savers, and close all windows.
- 3 Insert the Client installation CD or, if you are installing from a remote CD-ROM, map the client installation CD to a drive letter on the client PC.
- 4 Click Browse, and then select Setup.exe from the iccmsdk folder on the CD.

Result: The Setup window opens.

- 5 In the Install Path box, type the full path to the location in which you want to install the SDK.
- 6 Select the components you want to install.
- 7 Click OK.

Result: A confirmation dialog box appears.

- 8 Click Yes.

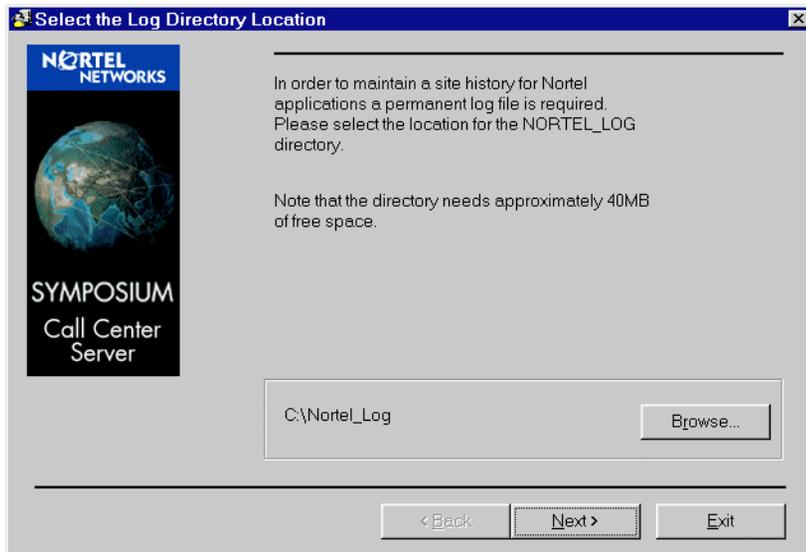
Note: If the path you selected does not exist, you are prompted to create it. Click OK.

Result: The following message appears: SDK Setup Complete. Please exit all applications and reboot your computer now.

- 9 Click OK to restart the PC.

- 10 Click OK to run.

Result: The Select the Log Directory Location dialog box appears.



- 11 If you do not want to install in the default path C:\Nortel_Log, click Browse and select another drive.

Chapter 7

Adding a System Management Interface system

In this chapter

Adding an SMI system	154
Testing the client-server connection	157

Adding an SMI system

Introduction

Use the SMI Workbench to add an SMI system for each server to which you want to connect from the client PC. When you double-click that system, the SMI Workbench initiates a connection to the server. When the connection is established, the SMI window opens. The SMI window contains programs for administering and monitoring the Symposium Call Center Server.

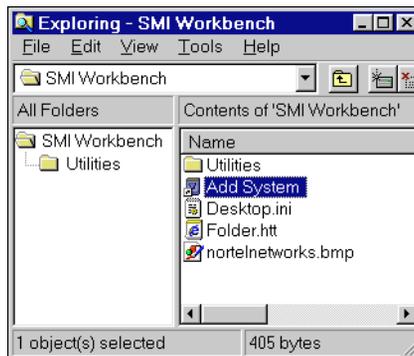
Using a dial-up connection to the server

Client PCs that are not on the same LAN as the server must use Dial-Up Networking to establish a network connection. For information about using a dial-up connection, refer to the *Administrator's Guide*.

Note: You cannot generate reports across a dial-up (PPP) connection.

To add an SMI system

- 1 From the Windows Start menu, click Programs → SMI Workbench.



- 2 Double-click Add System.

Result: The Add SMI System dialog box appears.

Add SMI System

The SMI System resides on a specific server.

Specify the computer name or IP address of the server:

255.155.155.01

If connected:

Verify address

Details retrieved from the server:

Contact name: John Smith

Location: BestAir Toronto

< Back Next > Cancel

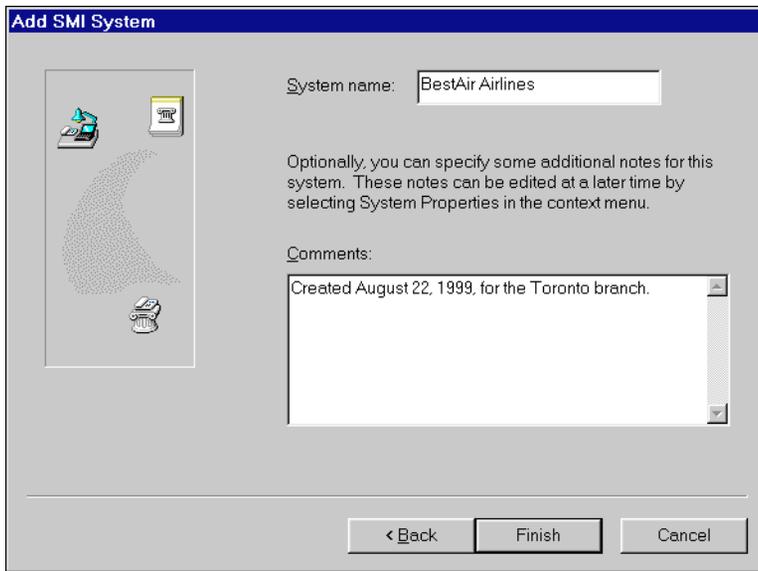
- 3 Enter the computer name or CLAN IP address of the server you want to access.

Note: If you are using a dial-up connection to the server, then enter the CLAN IP address and not the computer name.

- 4 If the client PC has a network connection established with the server, then click Verify Address to verify that the computer name or IP address is correct.

- 5 Click Next.

Result: The Add SMI System window appears.



- 6 Optionally, enter notes or comments that describe this SMI system.
- 7 Click Finish.

Result: An SMI system is added to the SMI Workbench folder.

Grouping SMI systems by site (Meridian 1 only)

Group SMI systems by site if the client PC is administering servers that are located in different locations.

To group SMI systems, create subfolders in the SMI Workbench folder. Name these subfolders by the site names. Click and drag the SMI systems into the appropriate folders.

What's next?

Continue with “Testing the client-server connection” on page 157.

Testing the client-server connection

Introduction

If you can log on to the server, then the connection between the server and client is configured correctly.

To log on to the server for the first time

- 1 Log on to the client PC.

Note: If the client PC is running Windows NT Workstation, log on as Administrator. Only the Administrator can accept the End-User License Agreement that appears when you connect to the server for the first time.

- 2 Double-click the icon for the Symposium Call Center Server to which you want to connect.

Result: The Symposium Login dialog box appears.

- 3 In the User ID box, type **sysadmin**. Use only lowercase letters.

- 4 In the Password box, type **nortel**. Use only lowercase letters.

Result: The End User Licence Agreement screen appears.

- 5 Click Accept.

Result: The system prompts you to change the password.

- 6 Follow the instructions to change the sysadmin password.

Result: The SMI window appears. If this window does not appear, see Appendix A, "Troubleshooting."

- 7 If you plan to configure the server at this time, then do this now using the programs in the SMI window. Refer to the *Symposium Call Center Server Administrator's Guide*.

Chapter 8

Upgrading, converting, and reinstalling server software

In this chapter

Upgrading server software	160
Converting from Release 1.1 or Release 1.5 to Release 3.0	174
Reinstalling server software	219

Upgrading server software

When to use

Follow this procedure only to upgrade the server from Symposium Call Center Server Release 3.0 to a newer version of Release 3.0 server software.

To upgrade from Symposium Call Center Server Release 1.1 or 1.5, refer to “Converting from Release 1.1 or Release 1.5 to Release 3.0” on page 174.

To reinstall the current version of the server software or add features, see “Reinstalling server software” on page 219.

You cannot downgrade to a previous version of Symposium Call Center Server software. Nor can you upgrade to a different switch type—for example, from a Meridian 1 switch to a DMS/MSL-100 switch. To use a different switch type, you must completely uninstall and then perform a new install. While installing, you must choose the correct switch type.

Note: If the upgrade process is not successful, you can restore your Release 1.1 or 1.5 system by following one of these procedures:

- For RAID systems, refer to the Release 3.0 *Administrator’s Guide*.
- For non-RAID systems, refer to the Release 1.5 *Backup and Restore Instructions* or Release 1.0 *System Administration Guide*.

Before you begin

Check for any Installation Addendums

Before performing an installation, upgrade, or conversion, check for any Installation Addendums on your regional Symposium Call Center Server technical web site. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic.

Select all PEPs to uninstall

During the upgrade, Performance Enhancement Packages (PEPs) might be listed as components to uninstall in the Programs to Install/Upgrade window. If they are present, you must uninstall PEPs as part of the upgrade. Ensure that all of the items in the window are selected so that the PEPs are uninstalled.

If upgrading from a networked CD, check operating system of source server

If you perform a server upgrade from a networked CD, then the machine that serves the CD must have Windows NT 4.0 (Server or Workstation) and be accessible over the LAN.

Checklist for upgrading the server software

The following table summarizes all steps involved in upgrading the server. You must complete all of these steps.

Steps	✓
Check the “Before you begin” section on page 160.	
Obtain the current passwords for the Administrator account and the NGenSys account.	
Establish a connection to the server by attaching a keyboard and monitor, or by using pcANYWHERE32. See page 91.	
Create a Platform Recovery disk. See page 162.	
Create a database backup. Refer to the <i>Administrator’s Guide</i> .	
Split the RAID drives. Refer to the <i>Administrator’s Guide</i> . (Optional) On a RAID system, if extra RAID drives are available, you might want to create a RAID backup. This can take several hours to complete. For more information, refer to the <i>Administrator’s Guide</i> .	
Apply the Microsoft hot fix. See page 163.	
Upgrade server software. See page 164.	
Install PEPs if a PEP CD was provided for the upgrade. See page 217.	

Steps	✓
Create a Platform Recovery disk. See page 162.	
Create a database backup of the server. Refer to the <i>Administrator's Guide</i> .	
Ensure that all Symposium Call Center Server services are started. See page 174.	
Continue with the client upgrade if required. See page 231.	

Requirements

Requirements	✓
Nortel Networks Symposium Call Center Server Release 3 Operating System CD Version 1.0 ATTENTION If this is not the version of the Operating System CD that you are using, refer to the <i>Distributor Technical Reference (DTR)</i> or to the <i>Documentation Addendum</i> before you proceed.	
Nortel Networks Symposium Call Center Server Application CD	
Release 3.0 keycode and serial number	

To create a Platform Recovery disk

- 1 Insert a disk into the floppy drive.
- 2 From the Program Manager, open the SysOps Utilities Programs Group and double-click the Migration icon.
- 3 Select Dump system information to floppy disk and click Continue.

Result: The program prompts you to insert a disk.

- 4 Click OK.

Result: The program saves the configuration to the disk and displays messages telling you that the save is complete.

- 5 Click OK in response to these messages.
Result: The program prompts you to remove the disk.
- 6 Click OK.
- 7 Label the disk with “Platform Recovery Disk” and the current date, and store it in a safe place.

To create a database backup

Make sure you have a current database backup of your server. If you do not, back up the database, following the instructions in the *Administrator's Guide*.

To split the RAID drives

If the server is running on a RAID system, split the RAID drives and run with a single set of RAID drives during the procedure. For more information, refer to the backup procedures in the *Administrator's Guide*.

Note: If extra RAID drives are available, you can also create a RAID backup before continuing with the conversion.

To apply the hot fix

- 1 Log on to the the server as Administrator.
- 2 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive.
- 3 Use Windows NT Explorer to copy the Hotfixes directory from the CD to drive D.
- 4 Make sure that hidden files are visible. To do so, follow these steps:
 - a. In Windows NT Explorer, choose View → Options.
 - b. Select Show all files.
 - c. Click Apply, and then click OK.
- 5 Copy the contents of the folder Hotfixes\Microsoft\q178741 on the CD to the folder you created on drive D.
- 6 In Windows NT Explorer, click on the D:\Hotfixes\Microsoft\q178741 folder.

- 7 Double-click the file hfx.exe, located in this folder.
Result: The Hotfix Manager window opens.
- 8 Click InstallNewFix.
Result: The Install Path dialog box opens.
- 9 Make sure that the path specified is D:\Hotfixes\Microsoft\q178741\hotfix.inf. If it is not correct, browse to this path.
- 10 Click OK.
Result: The program installs the hot fix on the server. When the installation is complete, the program notifies you that Windows NT has been updated.
- 11 Click Done.
Result: The system prompts you to restart. Do not click OK yet.
- 12 Restore the settings for hidden files. To do so, follow these steps:
 - a. In Windows NT Explorer, choose View → Options.
 - b. Select Hide files of these types.
 - c. Click Apply, and then click OK.
- 13 Click OK.
Result: The server restarts.
Note: If the server hangs during the restart, restart it manually.

To upgrade server software

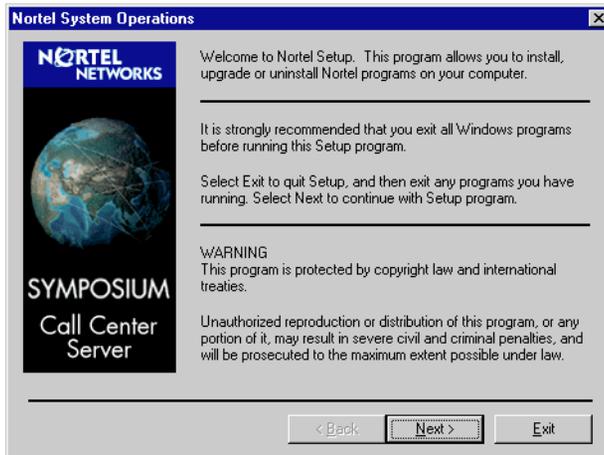
ATTENTION

During the upgrade installation, there are points where the setup program performs automatic installation steps in between wizard setup windows. Do not close any windows that appear during these steps. Wait for the next wizard setup window before you use the mouse or keyboard.

- 1 Insert the upgrade CD or, if you are installing from a remote CD-ROM or a network share, map the upgrade CD to a drive letter on the server.
- 2 Exit all applications, including screen savers, and close all windows.

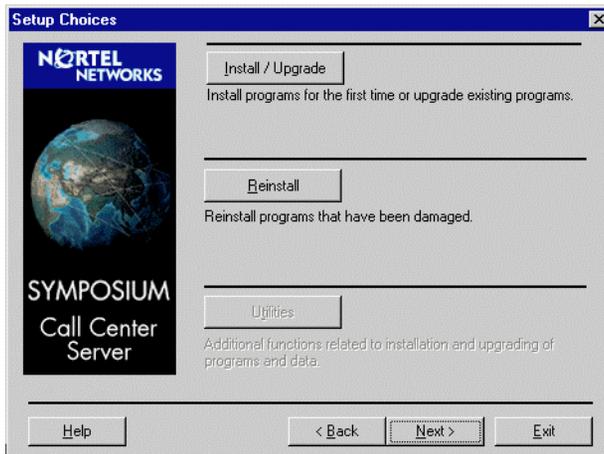
- 3 From the Windows Start menu, choose Run.
- 4 Click Browse, and then select Setup.exe from the root directory on the CD.
- 5 Click OK to run.

Result: The Nortel System Operations welcome dialog box appears.



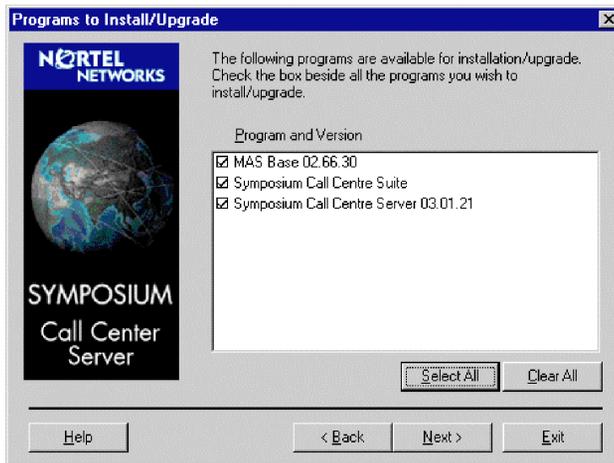
- 6 Click Next.

Result: The Setup Choices dialog box appears.

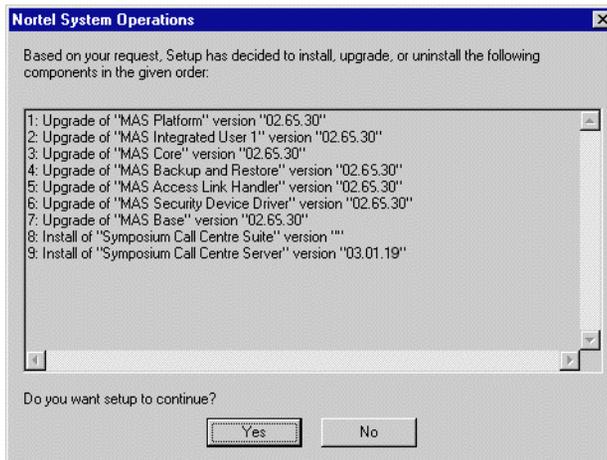


7 Click Install/Upgrade.

Result: Setup examines the system, and the Programs to Install/Upgrade dialog box appears.

**8** Click Select All, and then click Next.

Result: The Nortel System Operations dialog box appears and lists all components (including PEPs) in the order in which they will be upgraded.

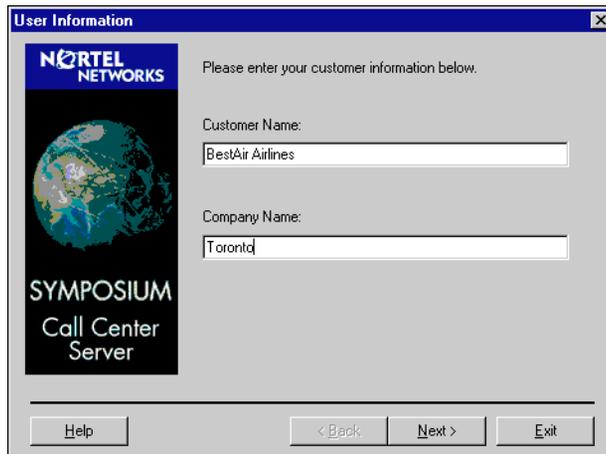
**9** Click Yes.

Notes:

- If a warning message appears because a text printer is not found, then click OK to bypass the warning. For details, see “Bypass the fault printer warning if it appears” on page 95.
- If the following message appears, then click Yes to continue:

Setup has found out that this drive “C:\” has less than 64 Mbytes of free space. Do you still want to continue?”

Result: Setup copies files to the server, and then the User Information dialog box appears.



User Information

NORTEL NETWORKS

Please enter your customer information below.

Customer Name:

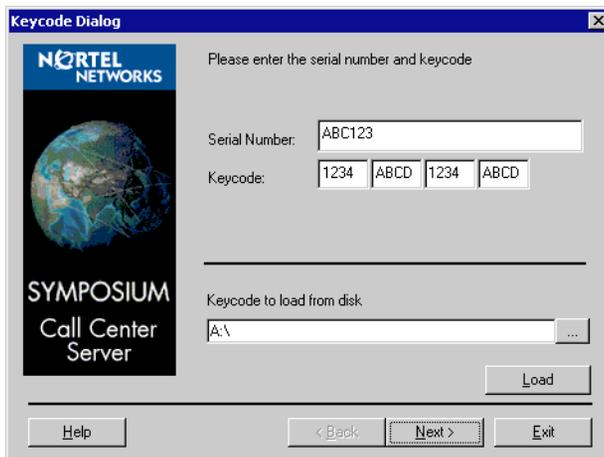
Company Name:

SYMPOSIUM
Call Center Server

Help < Back Next > Exit

- 10 Enter the customer and company names, and then click Next.

Result: The Keycode Dialog window appears.



- 11 Enter your keycode for Release 3.0 in one of the following ways:

- If you have a disk that contains your keycode information, follow these steps:
 - a. Insert the keycode disk into the floppy drive.
 - b. Click the (...) button to open a browse dialog box.
 - c. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial numbers are entered into the Keycode Dialog box.

- If your keycode information is stored on a hard disk, follow these steps:
 - a. Click the (...) button to open a browse dialog box.
 - b. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial number are entered into the Keycode Dialog box.

- Type your serial and keycode numbers in the appropriate fields.

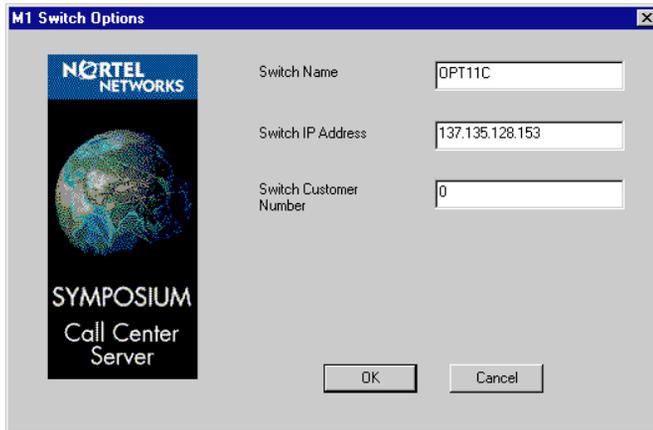
- 12 Click Next.

Result: The Keycode Verification window appears.

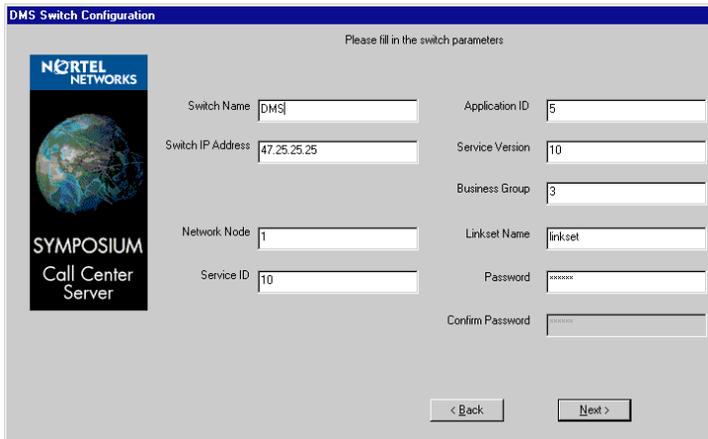
13 Click Next.

Result: Based on the system type that you are installing, one of the following dialog boxes appears:

M1 Switch Options dialog box



DMS Switch Configuration dialog box



Note: The MSL Switch Configuration dialog box is the same as the DMS Switch Configuration dialog box, except for the switch information.

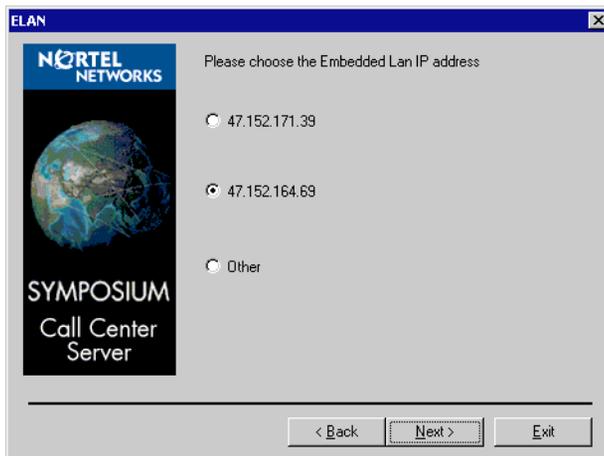
- 14 Enter the appropriate information for your switch. Refer to the information you entered in Chapter 2, “Worksheets and checklists,” and to the following restrictions that apply to switch names:

- Valid characters for switch names are A–Z, a–z, 0–9, _ (underscore) and . (period).
- Switch names must begin with an alphabetic character, and they cannot contain spaces.
- The last character must not be an underscore or a period.
- Switch names must not exceed 80 characters in length.

Tip: If you are unsure of the correct information or if you make a mistake, you can change the switch information after you finish the installation (see “Feature Report: Switch Information” on page 269).

- 15 Click Next.

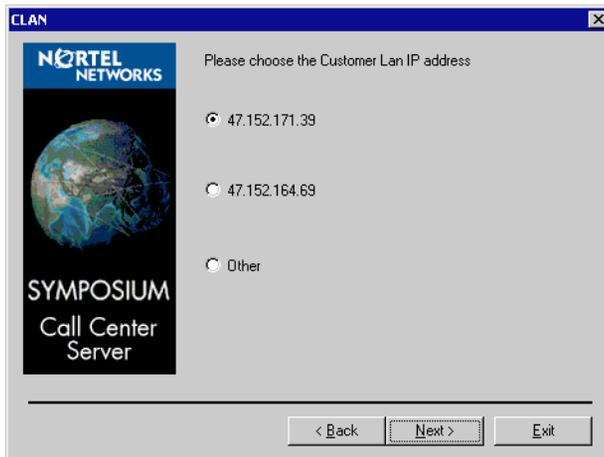
Result: The ELAN dialog box appears.



- 16 Enter the ELAN TCP/IP address for the server in one of the following ways:
- If the address appears in the dialog box, select it and click Next.

- If the ELAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

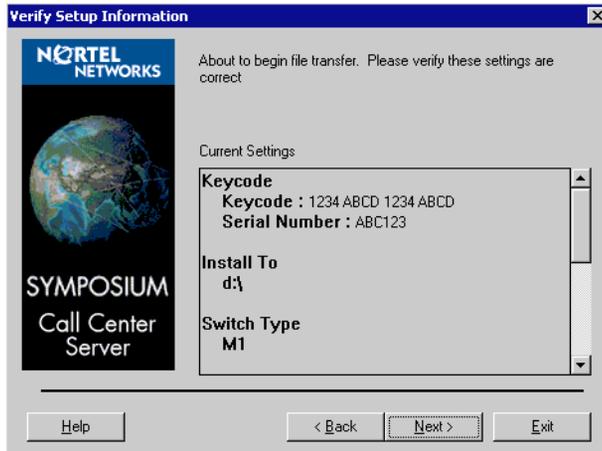
Result: The CLAN dialog box appears.



- 17 Enter the CLAN TCP/IP address for the server in one of the following ways:
 - If the address appears in the dialog box, select it and click Next.

- If the CLAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

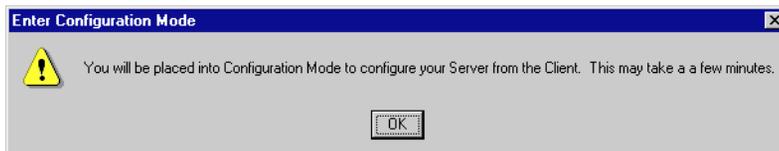
Result: The Verify Setup Information dialog box appears, similar to the following example:



- 18 Examine the list of current settings. If they are incorrect, click Back, make the necessary corrections, and click Next.
- 19 Click Next.

Result: The program begins to copy files to the hard drive and a progress bar appears. The program automatically fills dialog boxes. The keyboard and mouse are disabled during this portion of the setup.

When this step is completed, the Enter Configuration Mode message appears.



- 20 Click OK.

Result: The setup program validates scripts and puts the server into configuration mode.



- 21 If any configuration must be done offline from the switch, do it now. Otherwise, click OK to finish the upgrade.
- Result:** The Reboot dialog box appears.
- 22 Select Reboot now, and then click Next.
- 23 Log on to the server from the client PC, and check the status of all scripts.

Checking for PEPs

Extract and install the latest available software PEPs now. For more information, see “Installing PEPs and Service Update packs” on page 119.

Backing up the server

Create a Platform Recovery disk (see page 162) and a database backup (refer to the backup procedures in the *Administrator's Guide*).

Converting from Release 1.1 or Release 1.5 to Release 3.0

Introduction

This section describes the process of converting from Symposium Call Center Server software Release 1.1 or Release 1.5 to Release 3.0. Conversion from Release 1.0 to Release 3.0 is possible only after you first upgrade to Release 1.5. For more information, refer to *Symposium Call Center Server Upgrade Instructions from Release 1.0 to Release 1.5*.

Notes:

- In Release 3.0, a number of standard reports no longer exist. User-defined reports based on these reports are not available after the conversion. You must create new user-defined reports based on the new templates. To find out which new template contains the information you need, refer to the *Historical Reporting and Data Dictionary*.
- In Release 3.0, the database structure has changed. User-created reports that include fields that have been deleted from the database must be updated. For instructions, refer to the *Historical Reporting and Data Dictionary*.



CAUTION

Risk of data loss

Make sure you complete all steps in the Before you begin and Conversion checklists, and in the specified order.

Requirements

Requirements	✓
The Nortel Networks Symposium Call Center Server Release 1.5 Operating System CD	

Requirements	✓
Nortel Networks Symposium Call Center Server Release 3.0 Operating System CD Version 1.0, three Windows NT 4.0 Setup Boot disks, and the Certificate of Authenticity containing the Product ID Note: If you are using a different version of the CD, refer to your <i>Distributor Technical Reference</i> or <i>Documentation Addendum</i> .	
Nortel Networks Symposium Call Center Server Release 3.0 Application CD	
<i>If you are using the 1003t platform, you need the HP NetServer Navigator CD that accompanied the server.</i>	
All server driver disks for Windows NT 3.51 and Windows NT 4.0 , as described in the <i>Meridian Application Server Installation and Maintenance Guide</i> for your hardware platform. Note: If you are using the 1003t platform, you must generate the driver disks. These disks are used during the upgrade of Windows NT. For detailed instructions, refer to your regional Symposium Call Center Server technical web site	
Two blank floppy disks—one for the creation of a Platform Recovery disk and one for an emergency repair disk	

Requirements	✓
<p>Make sure that you have the following documents available:</p> <ul style="list-style-type: none"> ■ Installation Addendums and Readme files (including the pcANYWHERE Readme) from your regional Symposium Call Center Server technical web site. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic. ■ <i>Meridian Application Server Installation and Maintenance Guide</i> for your hardware platform ■ Release 1.5 <i>Backup and Restore Instructions</i> or Release 1.0 <i>System Administration Guide</i> ■ Release 3.0 <i>Administrator's Guide</i> ■ <i>Distributor Technical Reference or Documentation Addendum</i> ■ Chapter 4, "Preparing the server for remote access," from this guide 	
Keycode and serial number from the Release 1.1 or Release 1.5 software	
Keycode and serial number from the Release 3.0 software	
At least 256 Mbytes of free disk space on drive D of the server PC	

Before you begin

To make sure that the server is set up and ready for the conversion, perform these steps at least three days before beginning the conversion.

Notes:

- Some of these steps are required as a result of changes to hardware requirements in Release 3.0.
- If you want to perform a server conversion from Release 1.1 or 1.5 to Release 3.0 and perform a platform migration, you must perform the conversion and migration separately.

- If you want to migrate from, for example, a 2-Gbyte first physical drive server to a 4-Gbyte first drive server, perform the conversion on the original server first and then migrate to the new server. This ensures that there is more free disk space on the new server. In this case, the swap file on the new server remains on drive D.
- If you want to migrate from, for example, a 4-Gbyte first physical drive server to another 4-Gbyte first drive server, perform the platform migration to the new server first, and then perform the conversion. (Since the new server is usually faster, the conversion process finishes sooner on the new server.) This is a key element since there is usually a limited amount of downtime available to complete this task.

Step	✓
<p>If you are using the Standard version of the 701t or 702t platform, install the Upgrade Hardware Kit prior to upgrade.</p> <p>Note: Symposium Call Center Server Release 3.0 does not support the Standard version.</p>	
<p>Make sure that your server is equipped with at least 256 Mbytes of memory. See page 182.</p> <p>For more information on memory requirements, refer to <i>Symposium Call Center Server Planning and Engineering Guide</i>. For installation instructions, refer to the <i>Meridian Application Server Installation and Maintenance Guide</i> for your hardware platform.</p>	
<p>Make sure you have a current database (or optionally, full) backup of the server. See page 184.</p> <p>Time to complete: approximately 30 – 90 minutes (depending on the size of your database)</p>	
<p>If you have a RAID system, perform a consistency check of your RAID drives. For more information, see the Release 3.0 <i>Administrator's Guide</i>.</p> <p>(Optional) On a RAID system, if extra RAID drives are available, you might want to create a RAID backup. This can take several hours to complete. For more information, refer to the <i>Administrator's Guide</i>.</p> <p>Note: You can perform the consistency check during the conversion when you split the RAID drives, but the check is time-consuming. To save time during the conversion, perform the consistency check in advance.</p>	
<p>Obtain the latest Installation Addendums (including the pcANYWHERE Readme) from your regional Symposium Call Center Server technical web site. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic.</p>	

Step	✓
<p><i>If</i> you are using the 1003t platform, create a driver disk. For more information, see your regional Symposium Call Center Server technical web site.</p> <p>Note: Drivers for the 1003t platform are distributed on the HP NetServer Navigator CD-ROM.</p>	
<p>Create a Platform Recovery disk. See page 183.</p> <p>Note: This procedure requires that the appropriate PEPs be installed on the Release 1.1 or 1.5 server. To determine which PEPs you require, refer to your regional Symposium Call Center Server technical web site.</p> <p>Time to complete: approximately 3 minutes</p>	
<p>View each script to make sure that it follows new syntax rules.</p> <p>Script syntax rules have changed in Release 3.0. For example, in Release 1.5, it was not necessary to close comments, but in Release 3.0, all comments must be closed. Also, Release 3.0 does not support the use of Assigned/Assigned To a call variable of type Set. For more information about syntax rules, see the <i>Scripting Guide</i>. For information about script syntax changes, see the Installation Addendum on from your regional Symposium Call Center Server technical web site.</p>	

Conversion checklist

The following table summarizes all steps involved in converting from Symposium Call Center Server Release 1.1 or Release 1.5 to Release 3.0. This process takes from 4 to 6 hours to complete, depending on the size of your system. You must complete all of the following steps.

Step	✓
<p>Record your administrator logon password.</p> <p>Note: During the upgrade of Windows NT, all user profiles are removed. You must log on to the system as “Administrator” before and after you apply the Service Pack 3 in the Windows NT upgrade.</p>	
<p>Split the RAID drives. See page 184.</p> <p>Time to complete: approximately 20 minutes</p>	
<p>Uninstall pcANYWHERE32. The Windows NT upgrade causes a “missing DISPLAY_DRIVER.dll” problem with pcANYWHERE32. To avoid this problem, you must uninstall pcANYWHERE32. See page 184.</p> <p>Time to complete: approximately 15 minutes</p>	
<p>Make sure that the video adapter installed on the server PC is a VGA-compatible Display Adapter. See page 185.</p> <p>CAUTION</p> <p>Risk of system failure</p> <p>Before you proceed with the OS upgrade, make sure that the video adapter used by your system is a VGA-compatible Display Adapter. Failure to do so can result in the appearance of a blue screen, with the message The required system file display_driver.dll is bad or missing to appear during OS upgrade.</p>	
<p>Move the swap file (if it is on drive D). See page 186.</p> <p>Time to complete: approximately 20 minutes</p>	
<p>Delete unnecessary files (such as trace and log files) from the C and D drives. Make sure at least 256 Mbytes is available on drive D. See page 189.</p>	

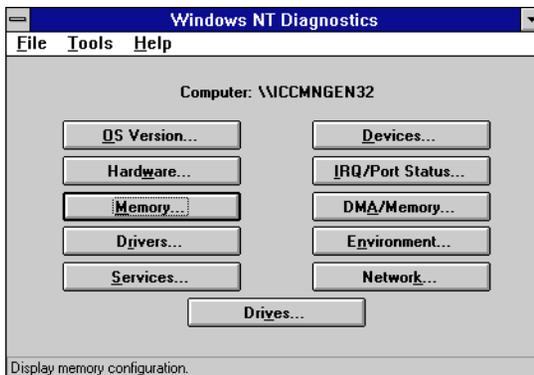
Step	✓
Perform the preconversion. See page 190. Time to complete: approximately 60 minutes	
Upgrade the Windows NT operating system. See page 191. Time to complete: approximately 60 minutes	
Apply Windows NT Service Pack 3. See page 195. Time to complete: approximately 10 minutes	
Remove Microsoft Internet Information Server. See page 196. Time to complete: approximately 2 minutes	
Apply the Microsoft hot fix. See page 197. Time to complete: approximately 15 minutes	
Install the DMI. See page 198. Time to complete: approximately 20 minutes	
Install the MAS server software. See page 201. Time to complete: approximately 55 minutes	
Run the Symposium Call Center Server software conversion. See page 205. Time to complete: approximately 60 minutes	
Change the video driver. See page 213. Time to complete: approximately 4 minutes CAUTION Risk of system failure Before you reinstall pcANYWHERE, make sure that the proper video driver for your platform is installed. Failure to do so can result in the appearance of a blue screen after pcANYWHERE version 8.0 installation or after use of pcANYWHERE for operations such as file transfer.	

Step	✓
Reinstall pcANYWHERE32. See page 215 and the Readme file on the Nortel Networks web site at your regional Symposium Call Center Server technical web site or the <i>Distributor Technical Reference</i> . Time to complete: approximately 15 minutes	
Configure pcANYWHERE on the server. See Chapter 4, “Preparing the server for remote access.”	
Create an emergency repair disk. See page 217. Time to complete: approximately 3 minutes	
Create a Platform Recovery disk. See page 183. Time to complete: approximately 3 minutes	
Create a database backup. Refer to the <i>Administrator’s Guide</i> .	

To check available memory

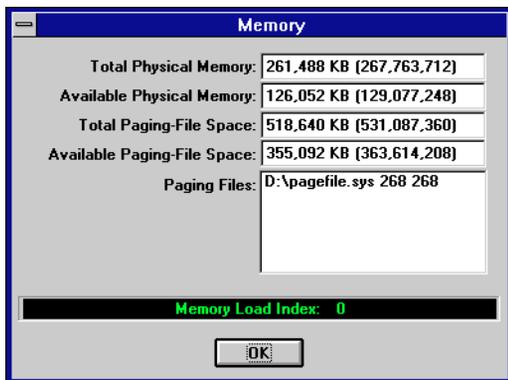
- 1 In the Program Manager window, double-click Control Panel.
- 2 In the Control Panel window, double-click Administrative Tools.
- 3 In the Administrative Tools window, double-click Windows NT Diagnostics.

Result: The Windows NT Diagnostics window appears.



- 4 Click Memory.

Result: The Memory dialog box appears.



- 5 Make sure total physical memory is greater than 256 000 kbytes.
- 6 Click OK to close the the Memory dialog box.
- 7 Choose File → Exit to close the Windows NT Diagnostics window.

To create a Platform Recovery disk

- 1 Insert a disk into the floppy drive.
- 2 Open the SysOps Utilities program folder and double-click Migration.
- 3 Select Dump system information to floppy disk and click Continue.

Result: The program prompts you to insert a disk.

Note: This process automatically checks the export database.
- 4 Click OK.

Result: The program saves the configuration to the disk, and displays messages telling you that the save is complete.
- 5 Click OK in response to these messages.

Result: The program prompts you to remove the disk.
- 6 Click OK.
- 7 For reference during the conversion, print the file Miginfo.txt, located on the disk.

- 8 Label the disk with "Platform Recovery Disk" and the current date, and store it in a safe place.

Making sure you have a current database backup

Before you continue, make sure you have a current database backup of the server. For more information, refer to the Release 1.5 *Backup and Restore Instructions* or Release 1.0 *System Administration Guide*.

Splitting the RAID drives

When you split the RAID drives, you are breaking the mirrored image of the primary hard drives and disabling their redundant hard drives. Any software activity that is performed on the system affects only the primary set of hard drives. The disabled drives continue to have the current system configuration, and you can use them to rebuild the RAID hard drives if a problem occurs during conversion.

For more information, refer to the backup procedures in the *Administrator's Guide*.

Note: If extra RAID drives are available, you can also create a RAID backup before continuing with the conversion. If you create a RAID backup, you might want to do this before the conversion since a RAID backup can take several hours to complete.

To uninstall pcANYWHERE32

- 1 Log on to Windows NT as Administrator (or other user with administrator access).
- 2 Close pcANYWHERE.
- 3 From the Program Manager, double-click pcANYWHERE32.
- 4 Double-click Remove pcANYWHERE.
- 5 When the message `pcANYWHERE32` will be removed from the following directory appears, click Yes to continue.
- 6 Follow screen instructions to uninstall pcANYWHERE32.

- 7 If the message `The system indicates that the following shared file is no longer used by any programs` appears, respond in one of the following ways:
 - For shared files in `\Program Files\Common Files\Symantec\Shared\` folder, click Yes.
 - For shared files in the `WINNT35\System32` folder, click No.

Result: `pcANYWHERE32` is now removed.
- 8 When the message `Uninstall completed. Some elements could not be removed.` appears, click OK.
- 9 When the message `pcANYWHERE32 has been uninstalled from your computer. Do you wish to reboot now?` appears, select Yes to restart the server.

To check your video adapter

Make sure that the video adapter installed on the server PC is a VGA-compatible Display Adapter.

Note: You can get a VGA-compatible Display Adapter driver from the Symposium Call Center Server Operating System CD for Release 1.1 or Release 1.5. You can also get information about compatible drivers from from your regional Symposium Call Center Server technical web site.

- 1 Log on to Windows NT as NGenSys.
- 2 In the Program Manager window, double-click Control Panel.
- 3 Double-click Display.
- 4 From the Display Settings dialog box, click the Change Display Type button.
- 5 On the Display Type dialog box, check the Adapter Type.

Note: If your video adapter is not VGA-Compatible Display Adapter, follow these steps:

- a. In the Adapter Type box, click Change.
- b. Select VGA-Compatible Display Adapter and click OK.

Result: A message appears: `This operation will change your system configuration. Do you want to proceed anyway?`

- c. Click Yes.
Note: If the message The driver(s) for this display are already on the system, appears, click New to continue.
Result: A message appears: Insert the CD you want to copy files from.
 - d. Insert the Symposium Call Center Server Release 1.5 Operating System CD and browse to the \I386 directory.
Result: The program copies the driver to your system. A message appears, notifying you that the drivers have been updated.
- 6 Click OK to exit the control panel.
 - 7 When prompted, click OK to restart the server PC.
Result: After restart, the system prompts you to change the display resolution.
 - 8 Click OK.
 - 9 Repeat steps 1 to 4 to view the Display Type window.
Result: The adapter type listed should be VGA-Compatible Display Adapter.
 - 10 Click Cancel twice to exit from the control panel.

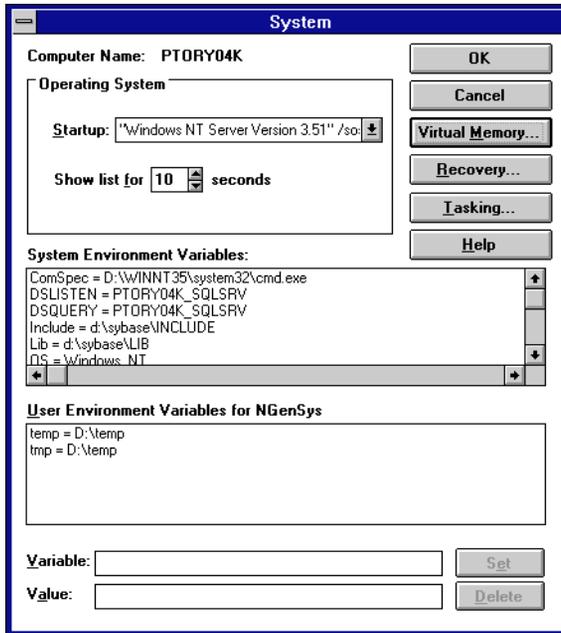
To move the swap file

Note: Perform this procedure if your swap file is on drive D.

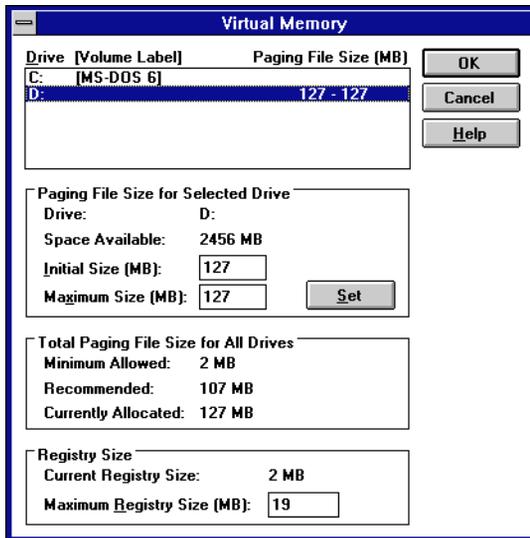
- 1 Log on to Windows NT as Administrator.
- 2 In the Program Manager window, double-click Main.
- 3 In the Main window, double-click Control Panel.

- 4 In the Control Panel window, double-click System.

Result: The System dialog box appears.



- 5 On the System dialog box, click Virtual Memory.

**Notes:**

- The drive specified in the Paging File Size for Selected Drive box is the drive on which the swap (paging) file resides.
 - If the specified drive is not drive D, you do not need to move the swap file. Click Cancel to close the Virtual Memory window and click Cancel to close the System Properties window.
 - If the specified drive is drive D, click Cancel to close the Virtual Memory window, and continue with the following steps.
 - The drives displayed on this dialog box vary depending on the hardware platform.
- 6 On the System dialog box, click Recovery.
 - 7 Ensure the Write debugging info to: check box is unchecked.
 - 8 Click OK.
 - 9 On the System dialog box, click Virtual Memory.
 - 10 In the Virtual Memory dialog box, select drive F, or the first available drive after drive D.
 - 11 Ensure that the selected drive has at least 288 Mbytes of available disk space. If not, repeat step 10 to select the next available drive.

Notes:

- If none of the drives have sufficient space, contact your Nortel Networks Customer Support representative.
- Use the selected drive only to store the database and the swap file. Do not store trace logs or other data on this drive.

12 Enter 268 for Initial Size and 268 for Maximum Size.

13 Click Set.

14 Select drive D.

15 Enter 0 for Initial Size and 0 for Maximum Size.

16 Click Set.

Note: If you see the following message, click OK:

If the pagefile on volume D has an initial size of less than 268 MB, then the system is unable to create a debugging information file if a STOP error occurs.

17 Click OK to apply the changes.

18 Click OK to close the System Properties window.

Result: The program prompts you to restart.

19 Click Restart Now.

Note: When you install the PEPs after the upgrade, you install a PEP that ensures that alarms for the drive to which you moved the swap file do not sound unless free space falls below a predetermined level.

To make sure sufficient disk space is available

- 1 Log on to Windows NT with the username **NGenSys** and the password **__ngen!**
- 2 In the Program Manager window, double-click Main.
- 3 In the Main window, double-click File Manager.
- 4 Select drive D.
- 5 Check the status bar at the bottom of the File Manager window to find out how much disk space is free.

Drive D must have at least 256 Mbytes available. If it does not, delete unnecessary files, such as trace and log files.

To perform the preconversion

- 1 Ensure that the server is fully functional and that all services are up and running, and then exit SMonW.
- 2 Open the SysOps Utilities folder, and double-click SysOps Check.
- 3 Follow the on-screen instructions.

Note: If the utility reports any errors (such as a site name that contains spaces), correct them before continuing.

- 4 Insert the Symposium Call Center Server Release 3.0 Server Application CD into the CD-ROM drive, or map a connection to the related virtual CD.
- 5 In the Program Manager window, double-click Main.
- 6 In the Main window, double-click File Manager.
- 7 Click on the CD-ROM drive icon (drive E).
- 8 Double-click setup.exe.

Result: The Conversion window appears.

- 9 Click Begin Conversion.

ATTENTION

If Dr. Watson displays Error code 87 during preconversion, click OK and ignore these error messages. They do not impact the preconversion.

Result: A window appears to remind you that no other applications can be running.

- 10 Close any active applications running on the server, including screen savers, and then click Yes to begin the conversion.



CAUTION

Risk of data loss

Although the message displayed by the program indicates that the conversion can take 45 minutes to an hour, it can actually take much longer—up to 3 hours. Do not stop the conversion manually. If you stop the conversion, restore Symposium Call Center Server Release 1.1 or 1.5 and begin the conversion again. For more information on restoring, refer to the Release 1.5 *Backup and Restore Guide* or Release 1.0 *System Administration Guide*.

Result: The following message appears: Pre-Conversion will take at least 45 minutes to 1 hour to complete. Please wait while Pre-Conversion is running. Do you wish to continue?

- 11 Click OK.

Result: The preconversion begins, and a progress bar appears. The preconversion process takes at least 45 minutes to complete. DOS windows appear during the process, and text scrolls within the windows. Some windows might remain unchanged for long periods.

- 12 When the message `PreConversion Complete` appears, click OK.

To upgrade from Windows NT 3.51 to Windows NT 4.0

Note: You can get a list of compatible drivers from from your regional Symposium Call Center Server technical web site.

- 1 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive and the WinNT 4.0 OS Setup Boot Disk #1 into drive A.
- 2 In the Program Manager, select File → Shutdown → Shutdown & Restart.
- 3 After the server restarts, follow the onscreen instructions.

- 4 When the message `Please insert the disk labeled Windows NT Server Setup Disk #2 into Drive A:` appears, insert the Windows NT Server Setup Disk #2 into Drive A, and then press Enter.
- 5 When the message `Welcome to Setup. The Setup program...` appears, press Enter to set up Windows NT.
- 6 When the message `Setup automatically detects floppy disk controllers and standard ESDI/IDE hard disks without user intervention` appears, type **S** to skip the mass storage device detection.
- 7 To install the IDE CD-ROM driver, follow these steps:
 - a. Type **S** to specify additional SCSI adapters, CD-ROM drivers, or special disk controllers.
Result: A list of controllers appears. Use the up and down arrow keys to view the complete list.
 - b. Scroll through the list of controllers, select IDE CD-ROM (ATAPI 1.2)/ PCI IDE Controller, and press Enter.
 - c. When the message `Please insert the disk labeled Windows NT Server Setup Disk #3 into Drive A:...` appears, insert the Windows NT Server Disk #3 into Drive A, and then press Enter.
- 8 To install other drivers, such as RAID or SCSI drivers, follow these steps:
 - a. Type **S** to select additional SCSI adapters, CD-ROM drivers, or special disk controllers.
Result: A list of controllers appears. Use the scroll bars to view the complete list.
 - b. Select Other (Requires disk provided by a hardware manufacturer), and then press Enter.
 - c. Insert the disk containing the device drivers, and then press Enter.
Example: For a non-1003t RAID system, you insert disk number NTRH8036.
Note: Make sure you choose the correct drivers for your hardware platform.
 - d. Select the mass storage device that you want, and then press Enter.
Example: For a non-1003t RAID system, select Mylex DAC 960.
- 9 If necessary, repeat step 8 to install additional SCSI drivers.

- 10 When the message Setup has recognized the following mass storage devices in your computer: appears, press Enter to continue setup.
- 11 When the message Please insert the disk labeled Windows NT Server Setup Disk #3 into Drive A: appears, insert the Windows NT Server Disk #3 into Drive A, and then press Enter.
Note: If the setup program detects that one or more of the hard disks in the system has more than 1024 cylinders, a warning message appears. Press Enter to continue.
- 12 When the message Windows NT Licensing Agreement appears, press the PgDn (Page Down) key and read the entire agreement. Then, if you accept the agreement, press F8 to continue the setup.
- 13 When the message Setup has found Windows NT on your hard disk in the directory shown below. D:\WINNT35 appears, press Enter to upgrade Windows NT in the directory shown above.
Note: Some WINNT35 directories might use a different drive letter.
- 14 When the message Setup will now examine your hard disk(s) for corruption appears, press Enter to allow Setup to perform an exhaustive secondary examination of your hard disks.
Result: Setup copies files to your hard disk.
- 15 When prompted, insert the disk from step 8c into Drive A:, and then press Enter.
- 16 If the message Setup has determined that the following file did not originate from Microsoft:... appears, press ESC after each message to keep the original third-party file.
- 17 When the message This portion of Setup has completed successfully. If there is a floppy disk inserted in drive A:, remove it appears, remove the disk from drive A and the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 from the CD-ROM drive.

- 18 Press Enter to restart the server. When your computer restarts, Setup continues.

ATTENTION

If you did not uninstall pcANYWHERE, an error message `Missing DISPLAY_DRIVER.DLL` appears. If this happens, restore Symposium Call Center Server Release 1.1 or 1.5, uninstall pcANYWHERE, and begin the conversion process again. For information on restoring Release 1.5, refer to the Symposium Call Center Server 1.5 *Backup and Restore Guide*.

- 19 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive again, and continue the setup after restart by following the screen instructions.
- 20 When the message `Welcome to the Windows NT Setup Wizard, which will guide you through the rest of Setup. To continue, click Next` appears, click Next.
- 21 At the prompt `Please locate your 20 digit 'Product ID', type in the Windows NT 4.0 OS Product ID, located on the Certificate of Authenticity, and click Next. Obtain the Product ID from your distributor or from the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0.`
- 22 When the message `Setup can create an emergency repair disk` appears, select No, do not create an emergency repair disk, and then click Next.
- 23 When the message `Windows NT comes with a variety of optional components, including games, disk tools, and other accessories` appears, select **Install the most common components (recommended)**, and then click Next.
- 24 When the message `Setup is now ready to guide you through installation of Windows NT Networking` appears, click Next to continue.
- 25 When the message `Windows NT will now upgrade your network components` appears, click Next to continue.

Notes:

- If the message `The following non-Microsoft networking component is installed on this computer appears`, click **OK**. The specified component might be a 3COM or Intel component.
 - If you see an application error message, record the message and click **OK** to continue.
- 26** When the message `Setup is almost finished. After you answer a few more questions...` appears, click **Finish** to complete the setup.
- Result:** Completion of setup takes from 5 to 10 minutes.
- Note:** If messages regarding unsupported components appear, then click **OK** to continue.
- 27** When the message `Windows NT has been successfully upgraded to version 4.00...` appears, remove the CD from the CD-ROM, and then click **Restart Computer** to restart the server.
- Note:** If the message `missing config.exe` appears, then click **Cancel** to continue.

To apply Windows NT Service Pack 3

- 1 Log on to Windows NT as Administrator.
- 2 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive.
- 3 In Windows NT Explorer, go to the CD-ROM drive and navigate to the `\sp3` directory.
- 4 Run `update.exe` and follow the screen instructions.
- 5 When the message `Welcome to Service Pack Setup` appears, click **Next** to install the Service Pack on your computer.
- 6 When the message `Please read the following license agreement` appears, click **Yes** to accept all of the terms of the License Agreement.
- 7 When the message `Please select the type of installation desired` appears, select **Install the Service Pack**, and then click **Next** to continue.

- 8 When the message You can choose to create an 'Uninstall' directory for the Service Pack appears, select No, I do not want to create an Uninstall directory, and then click Next.
- 9 When the message The Setup program for the Service Pack is ready to complete appears, click Finish to finish the setup.
Note: Application of the Service Pack takes about five minutes.
- 10 If the message The target file exists and is newer than the source. Overwrite the newer file? appears, click No to retain the newer file.
- 11 If a message appears indicating a file has been identified as an OEM installed, click No to retain the file.
- 12 When the message Windows NT 4.0 has been updated. Remove any floppy disks appears, remove the CD from the CD-ROM drive.
Result: The system prompts you to restart. Do not click OK yet.
- 13 Click OK to restart the server.

To remove Microsoft Internet Information Server

- 1 If Microsoft Internet Information Server (IIS) is installed automatically during the operating system conversion, go to Start → Programs → Microsoft Internet Server (Common), and then choose Internet Information Server Setup to remove IIS.
- 2 When the IIS welcome dialog box appears, click OK.
- 3 When the IIS Installation Maintenance program appears, click Remove All to remove previously installed components.
- 4 When the message Are you sure that you want to remove all the IIS components appears, click Yes to continue.
- 5 When the message Microsoft FTP Publishing Service is running. Do you want to stop the service? appears, click Yes.
- 6 When the message Microsoft Internet Information Server 3.0 setup has updated successfully appears, click OK to complete the removal of IIS.

To apply the hot fix

Note: Perform this procedure after installation of Service Pack 3. If you reinstall Service Pack 3, you must perform this procedure again after the reinstallation.

- 1 Log on to the the server as Administrator.
- 2 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive.
- 3 Make sure that hidden files are visible. To do so, follow these steps:
 - a. In Windows NT Explorer, choose View → Options.
 - b. Select Show all files.
 - c. Click Apply, and then click OK.
- 4 Copy the folder Hotfixes\Microsoft\q178741 on the CD to the root of drive D.
- 5 In Windows NT Explorer, click on the D:\Hotfixes\Microsoft\q178741 folder.
- 6 Double-click the file hfx.exe, located in this folder.

Result: The Hotfix Manager window opens.
- 7 Click InstallNewFix.

Result: The Install Path dialog box opens.
- 8 Make sure that the path specified is D:\Hotfixes\Microsoft\q178741\hotfix.inf. If it is not correct, browse to this path.
- 9 Click OK.

Result: The program installs the hot fix on the server. When the installation is complete, the program notifies you that Windows NT has been updated.
- 10 Click OK.

Result: The system prompts you to restart. Do not click OK yet.
- 11 When the HotFix Manager appears, click Done.
- 12 Restore the settings for hidden files. To do so, follow these steps:
 - a. In Windows NT Explorer, choose View → Options.
 - b. Select Hide files of these types.
 - c. Click Apply, and then click OK.
- 13 Remove the CD from the CD-ROM drive.

- 14 Click OK to restart the server.

Result: The server restarts.

Note: If the server hangs during the restart, restart it manually.

To install the DMI

- 1 Log on to Windows NT as Administrator.
- 2 Insert the Symposium Call Center Server Application CD into the CD-ROM drive or map a connection to a virtual CD.
- 3 Exit all applications, including screen savers, and close all windows.
- 4 From the Windows Start menu, choose Run.
- 5 Click Browse, select Setup.exe from the root directory on the CD, and click OK.

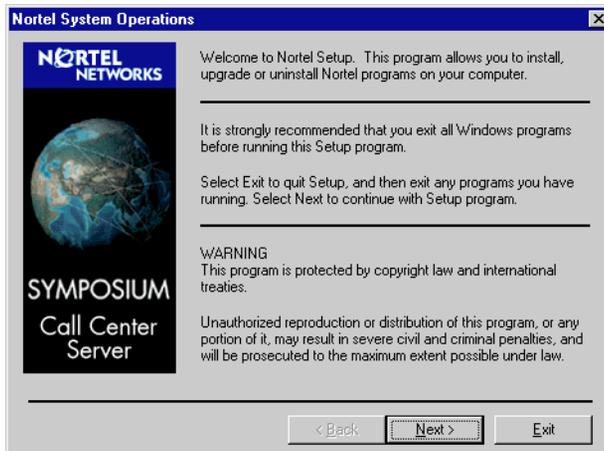
Note: The Welcome screen can take several minutes to display.

- 6 Click OK to run.

Result: The program displays the message `Setup` determines that DMI is not installed on your system. Do you want `Setup` to install DMI?

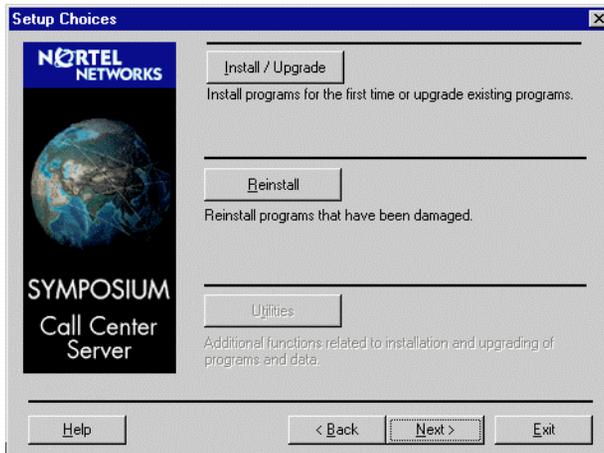
- 7 Click Yes to install the DMI. (If you click No, the installation stops.)

Result: The DMI installs and the Nortel System Operations welcome dialog box appears.



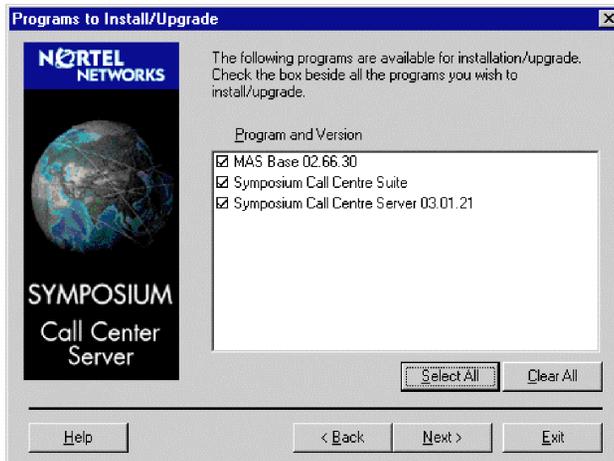
- 8 Click Next.

Result: The Setup Choices dialog box appears.



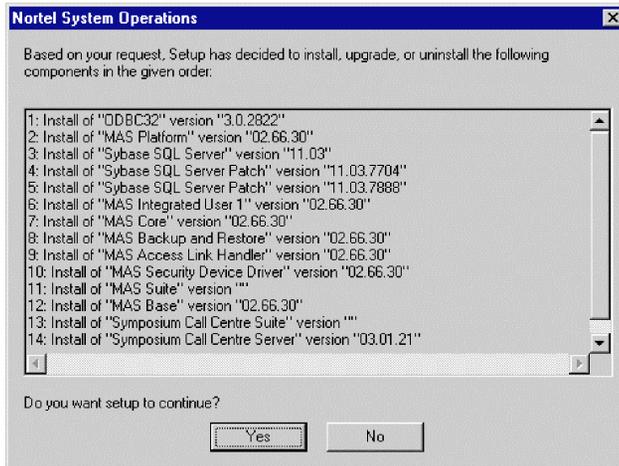
- 9 Click Install/Upgrade.

Result: The Programs to Install/Upgrade dialog box appears.



- 10 Click Select All, and then click Next.

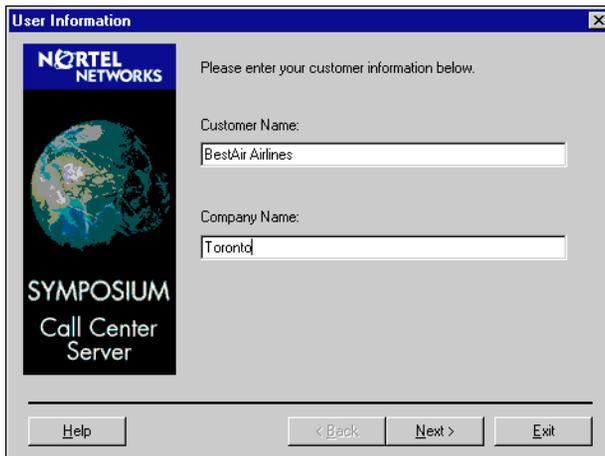
Result: A list of components to install or upgrade appears in a Nortel System Operations dialog box.



- 11 Click Yes and follow screen instructions.
- 12 If a warning message appears because a text printer is not found, then click OK to bypass the warning.

- 13 If a warning message appears because drive D has less than 512 Mbytes free, click Yes to continue.

Result: Setup copies files to the server, and then the User Information dialog box appears.



- 14 Make sure that the customer and company names are correct, and then click Next.

Result: The program installs the software and displays the message Setup is about to reboot the system. Please continue installation after reboot.

- 15 Click OK.

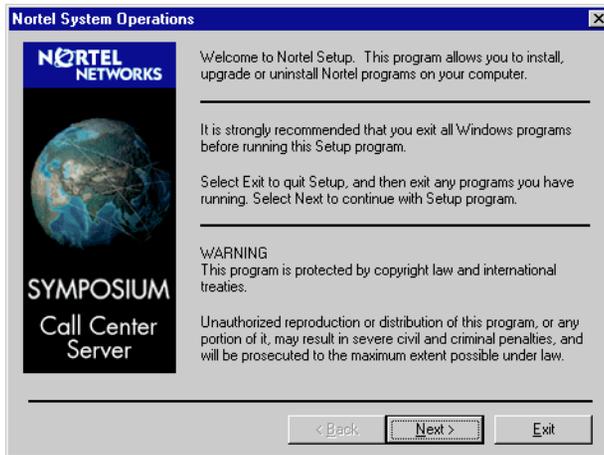
Result: The system restarts and logs on again automatically.

To install the MAS server software

- 1 Exit all applications, including screen savers, and close all windows.
- 2 From the Windows Start menu, choose Run.
- 3 Click Browse, and then select Setup.exe from the root directory on the CD.

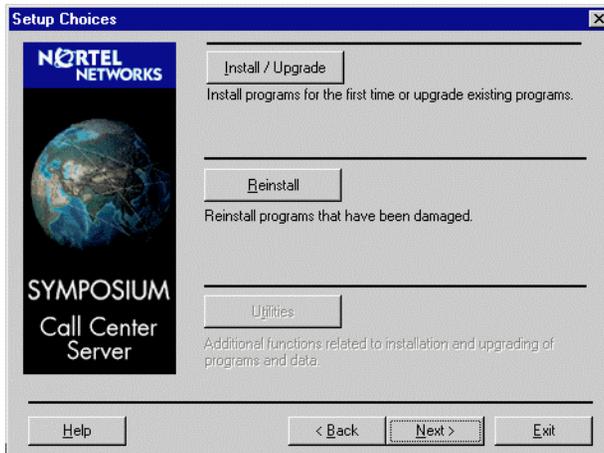
- 4 Click OK to run.

Result: The Nortel System Operations welcome dialog box appears.



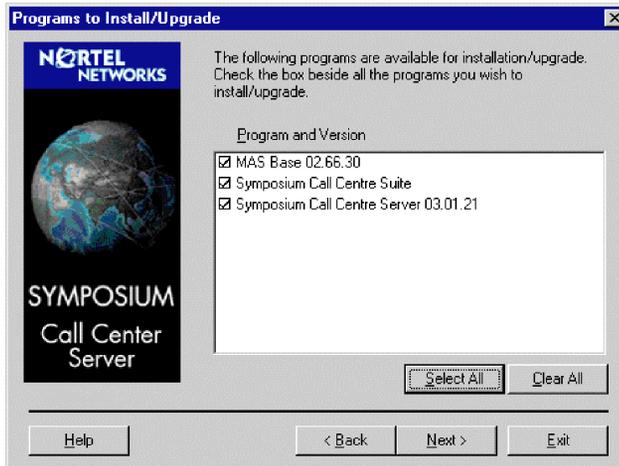
- 5 Click Next.

Result: The Setup Choices dialog box appears.



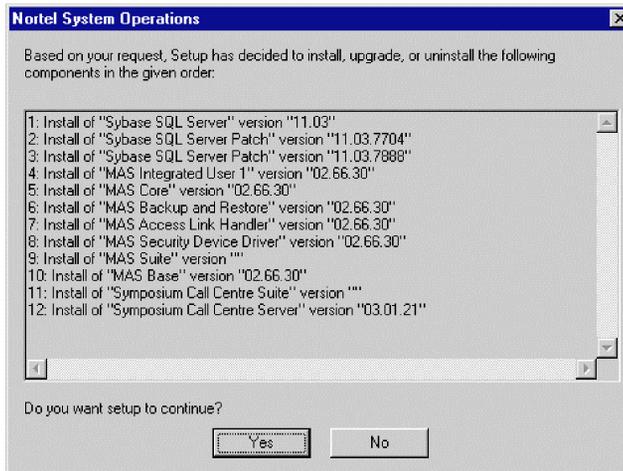
6 Click Install/Upgrade.

Result: Setup examines the system, and the Programs to Install/Upgrade dialog box appears.



7 Click Select All, and then click Next.

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

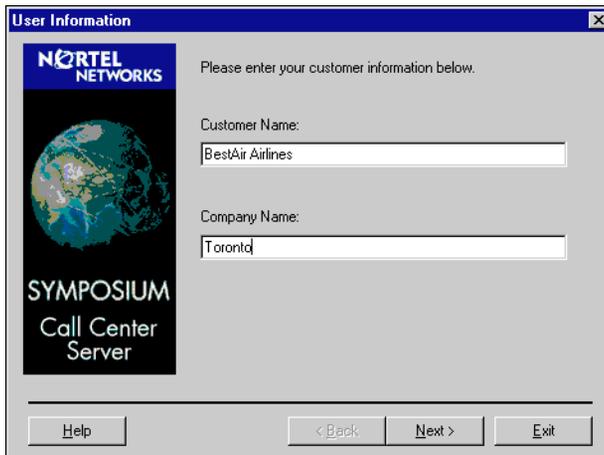


8 Click Yes.**Notes:**

- If a warning message appears because a text printer is not found, then click OK to bypass the warning.
- If the following message appears, then click Yes to continue:

Setup has found out that this drive "C:\\" has less than 64 Mbytes of free space. Do you still want to continue?"

Result: Setup copies files to the server, and then the User Information dialog box appears.



User Information

NORTEL NETWORKS

Please enter your customer information below.

Customer Name:
BestAir Airlines

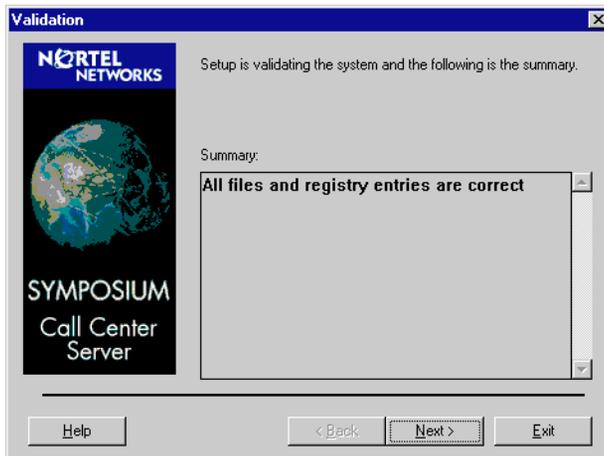
Company Name:
Torontd

SYMPOSIUM
Call Center Server

Help < Back Next > Exit

- 9 Enter the customer and company names, and then click Next.

Result: The MAS server software installs and the Validation dialog box appears. This process takes approximately 15 minutes.



- 10 Click Next.

Result: The program prompts you to restart.



- 11 Click OK to restart.

To convert the Symposium Call Center Server software

- 1 Log on to Windows NT with the username **NGenSys** and the password **__ngen!**

Note: If you do not log on using the NGenSys password, the install program in the following procedure prompts you to log on again using NGenSys.

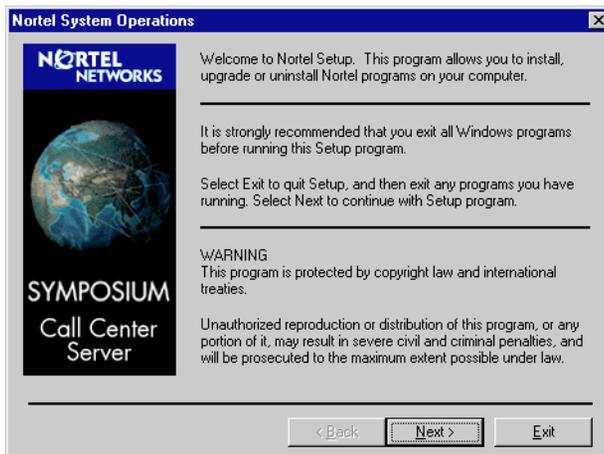
- 2 Insert the Symposium Call Center Server Application CD into the CD-ROM drive or map a connection to a virtual CD.

Note: If you must free up disk space, then delete temporary files and empty the recycle bin. You can also delete old PEPs or temporarily move unneeded data.

- 3 From the Windows Start menu, choose Run.
- 4 Click Browse, select Setup.exe from the root directory on the CD, and click Open.
- 5 Click OK to run.

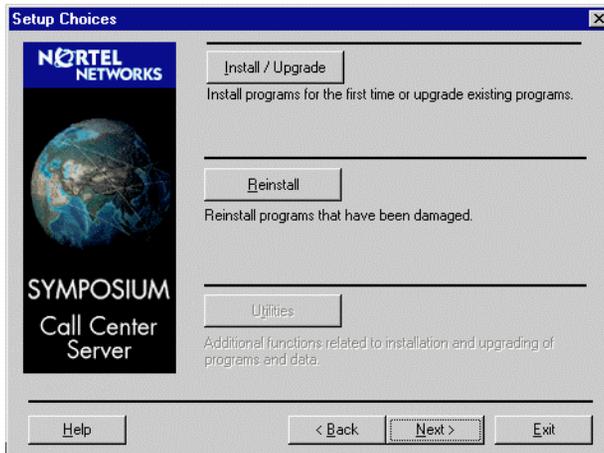
Note: The system might warn you that it has less than 512 Mbytes of free disk space on drive D. Ensure that you have at least 256 Mbytes of free disk space. If you do, click OK to continue.

Result: The Nortel System Operations welcome dialog box appears. (Depending on your server's performance, it can take several minutes for the welcome dialog box to appear.)



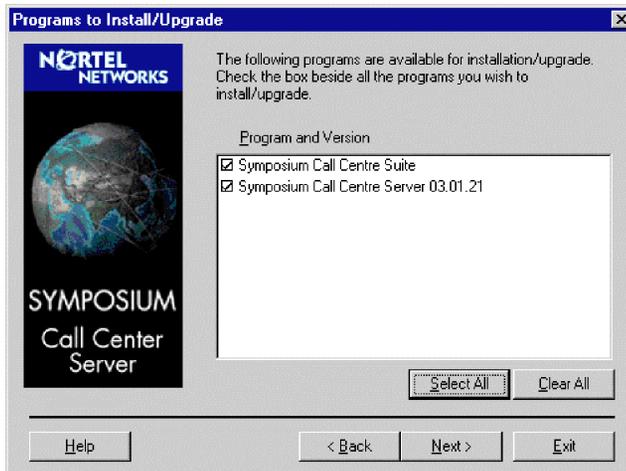
- 6 Click Next.

Result: The Setup Choices dialog box appears.



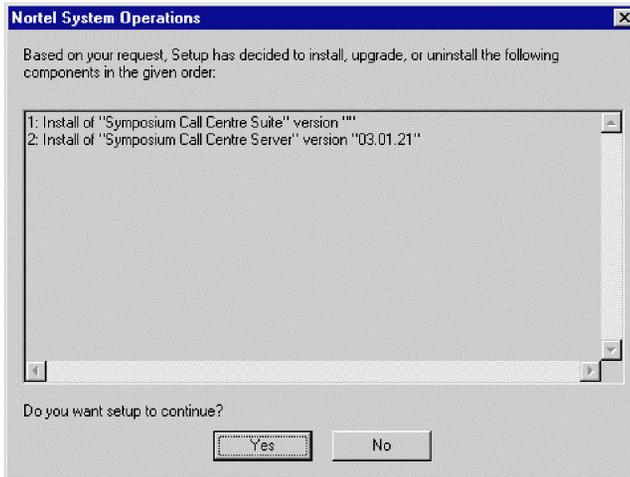
- 7 Click Install/Upgrade.

Result: The Programs to Install/Upgrade dialog box appears.



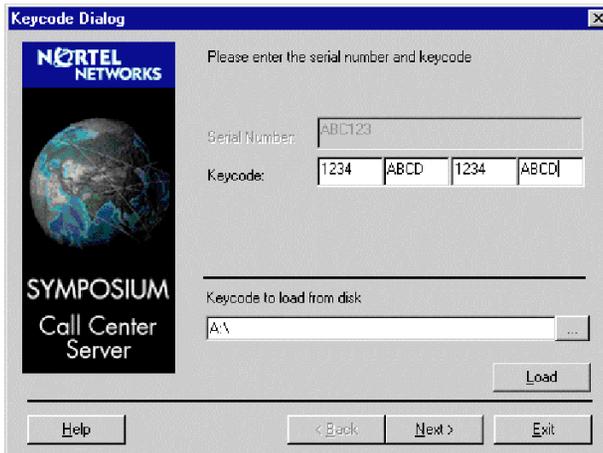
- Click Select All, and then click Next.

Result: A list of components to install or upgrade appears in a Nortel System Operations dialog box.



- Click Yes and follow screen instructions.

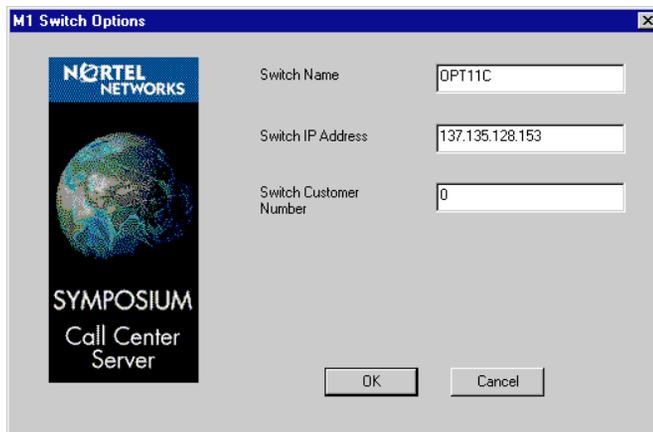
Result: The Keycode Dialog box appears.



- 10 Enter the keycode for Release 3.0 in one of the following ways:
- If you have a disk that contains your keycode information, follow these steps:
 - a. Insert the keycode disk into the floppy drive.
 - b. Click the (...) button to open a browse dialog box.
 - c. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial numbers are entered into the Keycode Dialog box.
 - If your keycode information is stored on a hard disk, follow these steps:
 - a. Click the (...) button to open a browse dialog box.
 - b. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial number are entered into the Keycode Dialog box.
 - Type your serial and keycode numbers in the appropriate fields.
- 11 Click Next.
- Result:** The Keycode Verification window appears.
- 12 Click Next.
- Result:** The M1 Switch Options dialog box appears.



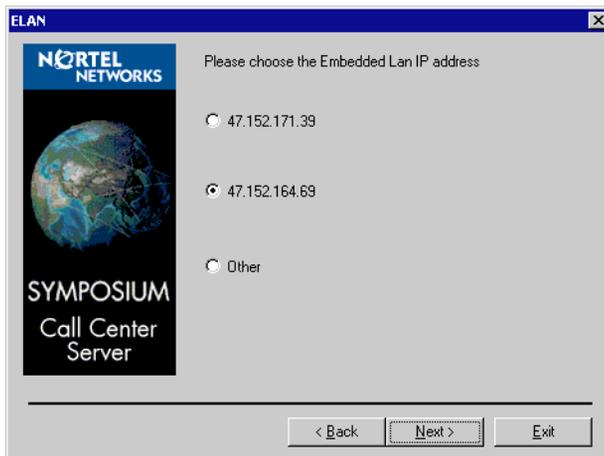
13 Enter the appropriate information for your switch. Refer to the information you entered in Chapter 2, “Worksheets and checklists,” and to the following restrictions that apply to switch names:

- Valid characters for switch names are A–Z, a–z, 0–9, _ (underscore) and . (period).
- Switch names must begin with an alphabetic character, and they cannot contain spaces.
- The last character must not be an underscore or a period.
- Switch names must not exceed 80 characters in length.

Tip: If you are unsure of the correct information or if you make a mistake, you can change the switch information after you finish the installation (see “Feature Report: Switch Information” on page 269).

14 Click Next.

Result: The ELAN dialog box appears.

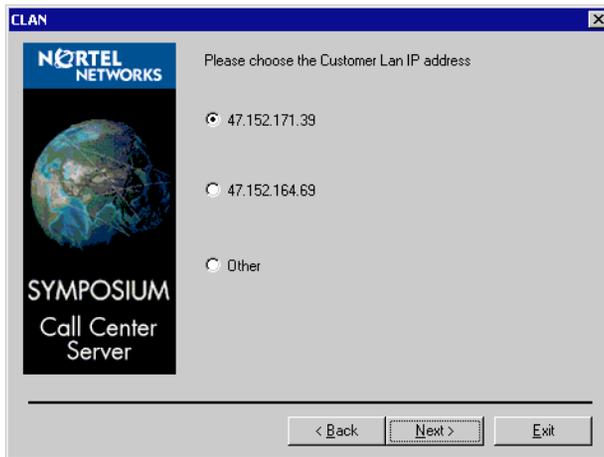


15 Enter the ELAN TCP/IP address for the server in one of the following ways:

- If the address appears in the dialog box, select it and click Next.

- If the ELAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

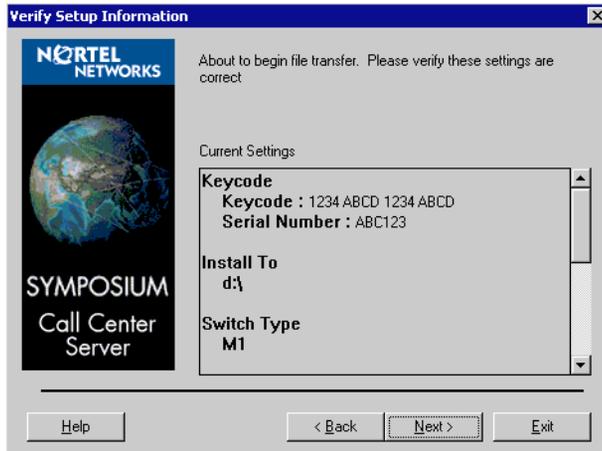
Result: The CLAN dialog box appears.



- 16** Enter the CLAN TCP/IP address for the server in one of the following ways:
- If the address appears in the dialog box, select it and click Next.

- If the CLAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

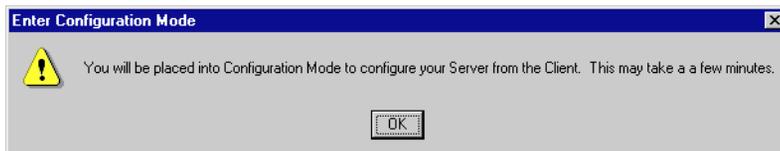
Result: The Verify Setup Information dialog box appears, similar to the following example.



- 17 Examine the list of current settings. If they are incorrect, click Back, make the necessary corrections, and click Next.
- 18 Click Next.

Result: The program begins to copy files to the hard drive and a progress bar appears. The program automatically fills dialog boxes. The keyboard and mouse are disabled during this portion of the setup.

When this step is completed, the Enter Configuration Mode message appears.



- 19 Click OK.

Result: The setup program validates scripts and puts the server into configuration mode.



- 20 Click OK to finish the upgrade.
Result: The Reboot dialog box appears.
- 21 Select Reboot now, and then click Next.
- 22 Log on to the server from the client PC, and check the status of all scripts.

To change the video drivers

Note: The video driver for the 1003t platform is on the HP NetServer Navigator CD. Video drivers for other platforms are on the Symposium Call Center Server Release 3 Operating System CD. For more information about your video driver, check your regional Symposium Call Center Server technical web site.

- 1 Log on to Windows NT as NGenSys.
- 2 Open the Control Panel (from the Windows Start menu, choose Settings → Control Panel).
- 3 Double-click Display.
- 4 Click the Settings tab.
- 5 Click the Display Type button.

Result: The Display Type window opens.

- 6 If you are using a 1003t platform, follow these steps. If you are using a 701t, 702t, 1000t, or 1001t platform, go to step 7.
 - a. In the Adapter Type group box, click Change.
Result: The Change Display dialog box appears.
 - b. Insert the HP NetServer Navigator CD.

Result: The HP NetServer Diskette Library opens.

- c. Click Exit.
 - d. In the Change Display dialog box, click Have Disk.
Result: The Install from Disk dialog box appears.
 - e. Browse to E:\periph\cl54x2\nt40\video (where E: is your CD-ROM drive).
 - f. Click OK.
Result: A dialog box displaying available drivers appears.
 - g. Select the Cirrus Logic driver and click OK.
Note: If the message `You are about to install a third-party driver`, appears, click `Yes` to continue.
Result: The driver is copied to your system. A message appears, notifying you that the driver has been installed.
- 7 If you are using a 701t, 702t, 1000t, or 1001t platform, follow these steps. If you are using a 701t, 702t, 1000t, or 1001t platform, go to step 8.
- a. Insert the Symposium Call Center Server Release 3.0 Operating CD, Version 1.0.
 - b. In the Display Type dialog box, click Detect.
Result: A warning message appears.
 - c. Click `Yes` to proceed with detection.
Result: The driver is copied to your system. A message appears, notifying you that the driver has been installed.
- 8 Click OK.
- 9 Click `Close` to close the Display Type dialog box.
- 10 Click `Close` to close the Display Properties dialog box.
Result: The system prompts you to restart the server PC.
- 11 Click `Yes`.
- 12 If your platform is not a 1003t, the system displays a message that the system found the Cirrus Compatible Display Adapter on your machine. Click OK.
- 13 When the system prompts you to change the display resolution, click OK.

- 14 Repeat steps 2 to 5 to view the Display Type window.

Result: For the 1003t platform, the adapter type listed should be Cirrus Logic CL-GD5446 Graphics Adapter 1.41. For all other platforms, it should be cirrus compatible display adapter.

- 15 Click Cancel twice to exit from the control panel.

To reinstall pcANYWHERE32



CAUTION

Risk of system failure

Make sure that before you reinstall pcANYWHERE, the proper video driver for your platform is installed (see the preceding procedure). Failure to do so can result in the appearance of a blue screen after pcANYWHERE version 8.0 installation or after use of pcANYWHERE for operations such as file transfer.

You must now install pcANYWHERE 8.02. This involves reinstalling pcANYWHERE 8.0 and applying PEPs to upgrade to version 8.02.

Note: Both pcANYWHERE 8.0 and the PEPs that upgrade the program to version 8.02 are located on the Release 3.0 Operating System CD.

- 1 Log on to the server as Administrator.
- 2 Insert the Symposium Call Center Server Release 3.0 Operating System CD Version 1.0 into the CD-ROM drive.
- 3 Browse to the path `Installs\PCA32\Disk1`, and double-click `Setup.exe`.

Result: The Welcome to the pcANYWHERE Setup program dialog box appears.

- 4 Click Next.

Result: The following message appears: Please type both your name and the name of your company in the space provided below.

- 5 Make sure the name and company name are correct, and click Next.

Result: The following message appears: Please read the following license agreement.

6 Click Yes.

Result: The following message appears: Setup will install pcANYWHERE32 in the following directory.

7 Click Next.

Result: A message appears, listing the actions that the Setup program is about to perform.

8 Click Next.

Result: The following message appears: StandardCare Support...

9 Click Next.

Result: The following message appears: CompuServe GO SYMANTEC...

10 Click Next.

Result: The following message appears: Symantec also offers the following business software solutions for Windows 95 users...

11 Click Next.

Result: The following message appears: Please take a moment to register now...

12 Click Skip.

Result: The following message appears: Do you want to view the README file now?

13 Click No.

14 When the message Congratulations!!! pcANYWHERE32 for Windows 95 and Windows NT has been successfully installed on your computer... appears, select Yes, I want to restart my computer now, and then click Finish.

15 The server restarts automatically.

Note: If the server does not restart automatically, press the Restart button to restart the server manually. If the manual restart fails, refer to page 285.

- 16 After the server restarts successfully, apply the pcANYWHERE PEPs. For detailed instructions, refer to the Readme file your regional Symposium Call Center Server technical web site.

Note: The PEPs upgrade pcANYWHERE to version 8.02, and apply some patches. The PEPs are located on the Symposium Call Center Server Operating System CD Version 1.0.

- 17 Remove the CD from the CD-ROM drive.

Configuring pcANYWHERE

Now you must configure pcANYWHERE. For detailed instructions, see Chapter 4, “Preparing the server for remote access.”

Checking for PEPs

Extract and install the latest available software PEPs now. For more information, see “Installing PEPs and Service Update packs” on page 119.

To create an emergency repair disk

- 1 Log on to Windows NT as Administrator, using password abc123.
- 2 From the Windows Start menu, choose Run.
- 3 Type **rdisk /s** and click OK.
- 4 When prompted, insert a blank floppy disk into drive A to create the emergency repair disk and follow screen instructions. For more information on updating the emergency repair disk, see “Updating the emergency repair disk” on page 68.

What's next?

Back up the server

Create a Platform Recovery disk (see page 183) and a database backup (refer to the *Administrator's Guide*).

Ensure that Symposium Call Center Server services are started

If you can see the SMonW window, check that all of the services are started. If this window is not open, or if some services are not started, then run the Startup utility (from the Windows Start menu, choose Programs → Symposium Call Center Server → Startup).

Note: If the TFE service does not start up, the syntax in one or more of your scripts is invalid. Validate your scripts (see the *Scripting Guide*).

Update the emergency repair disk

Whenever you make changes to the server, update the emergency repair disk to record the latest configuration data. Follow the instructions in “Updating the emergency repair disk” on page 68.

Rebuild the RAID drives

If you have split the RAID drives, rebuild the RAID drives when you are confident of the conversion and server operation. For more information, refer to the *Administrator’s Guide*.

Upgrade the client PC

Go to Chapter 9, “Upgrading, converting and reinstalling client software,” and begin the client PC upgrade.

If you must restore the Release 1.1 or Release 1.5 server

You can restore your Release 1.1 or 1.5 system in one of the following ways:

- For non-RAID systems, use the platform recovery disk and database restore. Refer to the Release 1.5 *Backup and Restore Instructions* or Release 1.0 *System Administration Guide*.
- For RAID systems, follow the procedure for recovering an entire RAID system in the restore procedures of the *Administrator’s Guide*.

Reinstalling server software

When to use

Use this procedure

- to add additional features with a new keycode for the same server version
- to reinstall the same server software version (for example, when the Symposium Call Center Server application is damaged)

A reinstallation can be done only on a server that has already been installed properly. For example, if you have a working server that suddenly has problems in the application software, you can try to reinstall the application software.

Note: You cannot downgrade features (that is, remove features or reduce the number of purchased agents) with this procedure.

If you encounter a problem during a new installation, you must uninstall and then do the installation again.

The reinstallation does not repair data files or the database. If the hard drive or database has become corrupted or has failed, refer to the *Nortel Networks Symposium Call Center Server Administrator's Guide* for recovery procedures.

Before you begin

Before reinstalling software, create a database backup of the server. See the *Administrator's Guide*.

To create a Platform Recovery disk

- 1 Insert a disk into the floppy drive.
- 2 From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.
- 3 Select Dump system information to floppy disk and click Continue.

Result: The program prompts you to insert a disk.

- 4 Click OK.
Result: The program saves the configuration to the disk, and displays messages telling you that the save is complete.
- 5 Click OK in response to these messages.
Result: The program prompts you to remove the disk.
- 6 Click OK.
- 7 Label the disk with “Platform Recovery Disk” and the current date, and store it in a safe place.

To reinstall server software

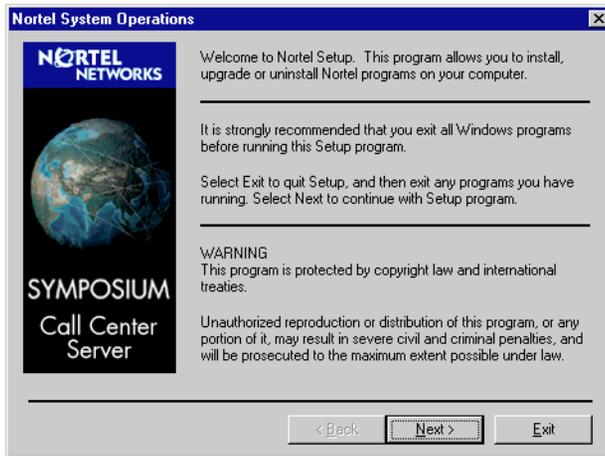
ATTENTION

During the reinstallation, there are points where the setup program performs automatic installation steps in between wizard setup windows. Do not close any windows that appear during these steps. Wait for the next wizard setup window before you use the mouse or keyboard.

- 1 Insert the upgrade CD or, if you are installing from a remote CD-ROM or a network share, map the upgrade CD to a drive letter on the server.
- 2 Exit all applications, including screen savers, and close all windows.
- 3 From the Windows Start menu, choose Run.
- 4 Click Browse, and then select Setup.exe from the root directory on the CD.

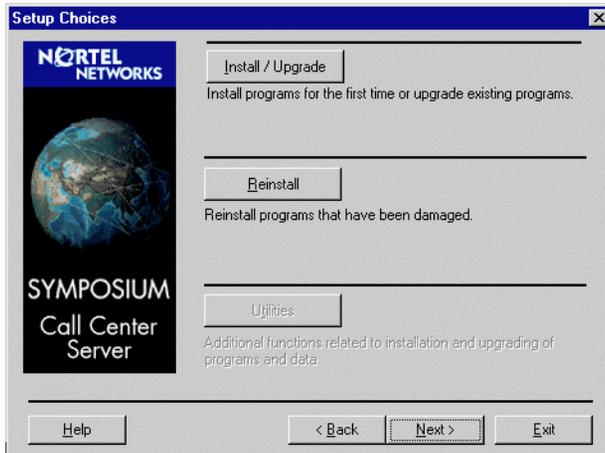
- 5 Click OK to run.

Result: The Nortel System Operations welcome dialog box appears.



- 6 Click Next.

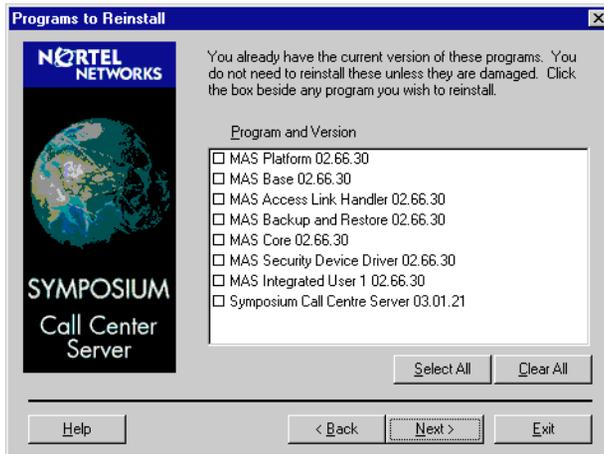
Result: The Setup Choices dialog box appears.



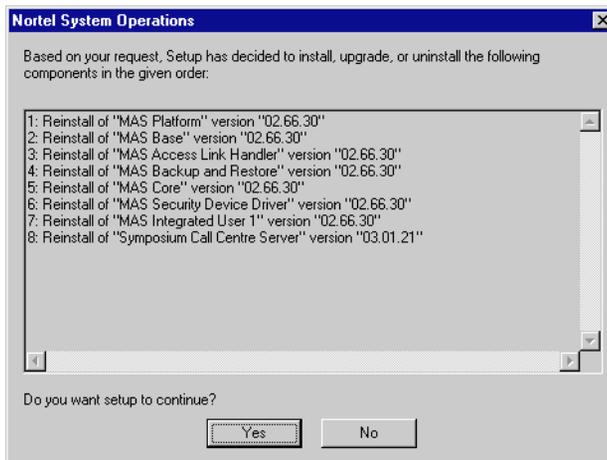
7 Click Reinstall.

Result: Setup examines the system, and the Programs to Reinstall dialog box appears.

Result: The Programs to Reinstall dialog box appears.

**8** Click Select All, and then click Next.

Result: The Nortel System Operations dialog box appears and lists all components in the order in which they will be reinstalled.

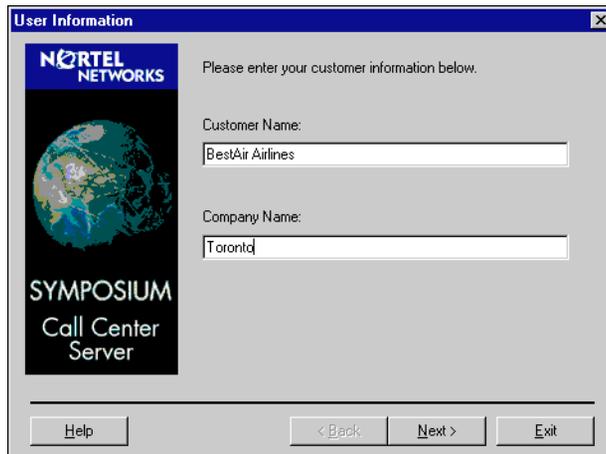
**9** Click Yes.

Notes:

- If a warning message appears because a text printer is not found, then click OK to bypass the warning. For details, see “Bypass the fault printer warning if it appears” on page 95.
- If the following message appears, then click Yes to continue:

Setup has found out that this drive “C:\” has less than 64 Mbytes of free space. Do you still want to continue?”

Result: Setup copies files to the server, and then the User Information dialog box appears.



The image shows a Windows-style dialog box titled "User Information". On the left side, there is a logo for "NORTEL NETWORKS" above a globe, and below the globe, the text "SYMPOSIUM Call Center Server". On the right side, the text "Please enter your customer information below." is followed by two text input fields. The first field is labeled "Customer Name:" and contains the text "BestAir Airlines". The second field is labeled "Company Name:" and contains the text "Torontd". At the bottom of the dialog box, there are four buttons: "Help", "< Back", "Next >", and "Exit".

- 10 Enter the customer and company names, and then click Next.

Result: The Keycode Dialog window appears.

Keycode Dialog

Please enter the serial number and keycode

Serial Number: ABC123

Keycode: 1234 ABCD 1234 ABCD

Keycode to load from disk

A:\

Load

Help < Back Next > Exit

- 11 Enter the keycode for Release 3.0 in one of the following ways:

- If you have a disk that contains your keycode information, follow these steps:
 - a. Insert the keycode disk into the floppy drive.
 - b. Click the (...) button to open a browse dialog box.
 - c. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial numbers are entered into the Keycode Dialog box.

- If your keycode information is stored on a hard disk, follow these steps:
 - a. Click the (...) button to open a browse dialog box.
 - b. Locate and select the file that contains the keycode information and click Load.

Result: The keycode and serial number are entered into the Keycode Dialog box.

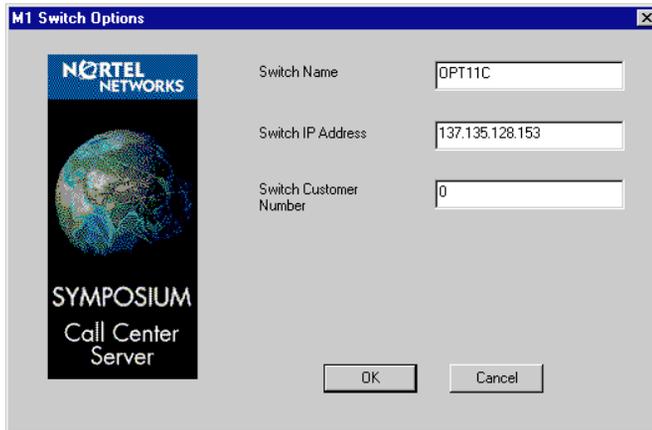
- Type your serial and keycode numbers in the appropriate fields.

- 12 Click Next.

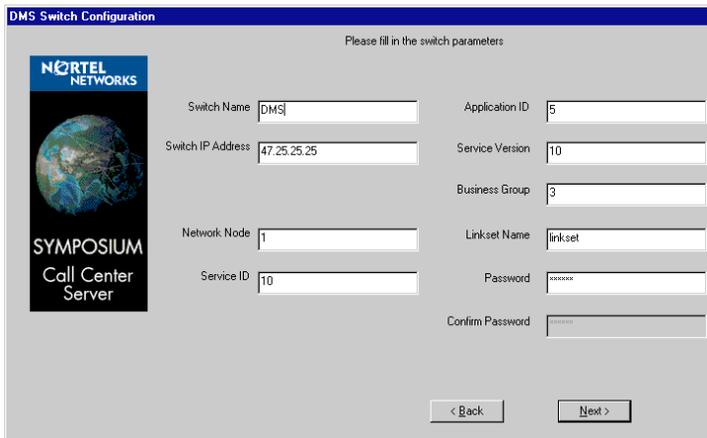
Result: The Keycode Verification window appears.

13 Click Next.

Result: Based on the system type that you are installing, one of the following dialog boxes appears:

M1 Switch Options dialog box

The M1 Switch Options dialog box features a logo on the left with the text "NORTEL NETWORKS" and "SYMPOSIUM Call Center Server" over a globe image. On the right, there are three input fields: "Switch Name" with the value "OPT11C", "Switch IP Address" with the value "137.135.128.153", and "Switch Customer Number" with the value "0". At the bottom right are "OK" and "Cancel" buttons.

DMS Switch Configuration dialog box

The DMS Switch Configuration dialog box has a title bar "DMS Switch Configuration" and a subtitle "Please fill in the switch parameters". It contains a logo on the left with "NORTEL NETWORKS" and "SYMPOSIUM Call Center Server" over a globe. The right side has two columns of input fields: "Switch Name" (DMS), "Application ID" (5), "Switch IP Address" (47.25.25.25), "Service Version" (10), "Network Node" (1), "Business Group" (3), "Service ID" (10), "Linkset Name" (link.set), "Password" (*****), and "Confirm Password" (*****). At the bottom are "< Back" and "Next >" buttons.

Note: The MSL Switch Configuration dialog box is the same as the DMS Switch Configuration dialog box, except for the switch information.

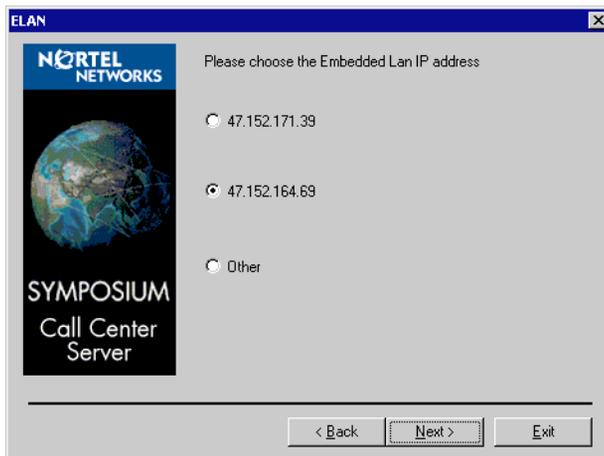
- 14 Enter the appropriate information for your switch. Refer to the information you entered in Chapter 2, “Worksheets and checklists,” and to the following restrictions that apply to switch names:

- Valid characters for switch names are A–Z, a–z, 0–9, _ (underscore) and . (period).
- Switch names must begin with an alphabetic character, and they cannot contain spaces.
- The last character must not be an underscore or a period.
- Switch names must not exceed 80 characters in length.

Tip: If you are unsure of the correct information or if you make a mistake, you can change the switch information after you finish the installation (see “Feature Report: Switch Information” on page 269).

- 15 Click Next.

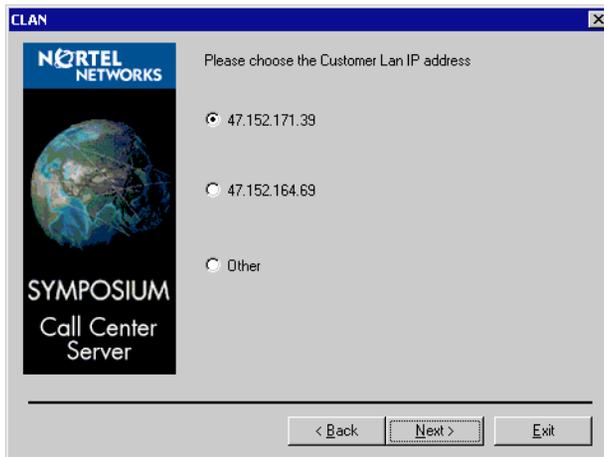
Result: The ELAN dialog box appears.



- 16 Enter the ELAN TCP/IP address for the server in one of the following ways:
- If the address appears in the dialog box, select it and click Next.

- If the ELAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

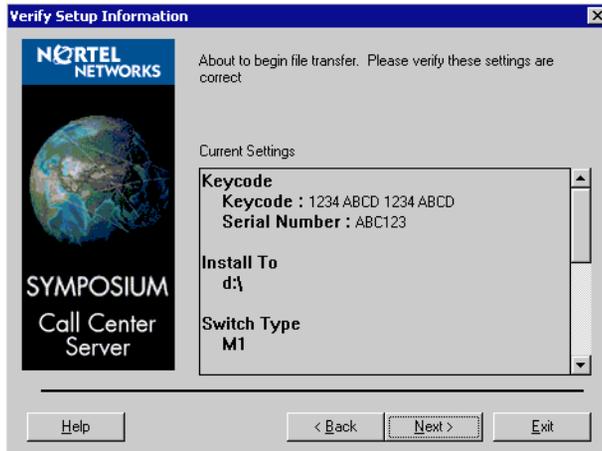
Result: The CLAN dialog box appears.



- 17 Enter the CLAN TCP/IP address for the server in one of the following ways:
 - If the address appears in the dialog box, select it and click Next.

- If the CLAN TCP/IP address does not appear in the dialog box, select Other, enter the correct IP address in the dialog box that appears, and then click Next.

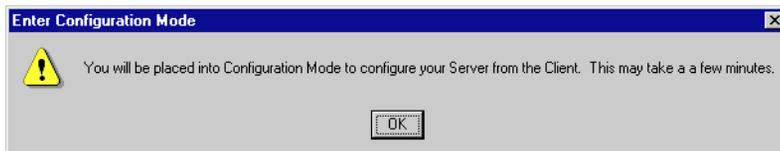
Result: The Verify Setup Information dialog box appears, similar to the following example.



- 18 Examine the list of current settings. If they are incorrect, click Back, make the necessary corrections, and click Next.
- 19 Click Next.

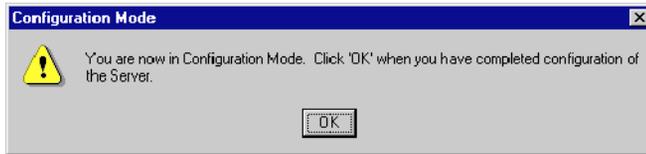
Result: The program begins to copy files to the hard drive and a progress bar appears. The program automatically fills dialog boxes. The keyboard and mouse are disabled during this portion of the setup.

When this step is completed, the Enter Configuration Mode message appears.



- 20 Click OK.

Result: The setup program validates scripts and puts the server into configuration mode.



- 21 If any configuration must be done offline from the switch, do it now. Otherwise, click OK to finish the upgrade.
- Result:** The Reboot dialog box appears.
- 22 Select Reboot now, and then click Next.
- 23 Log on to the server from the client PC, and check the status of all scripts.

Reapplying PEPs

Reapply any software PEPs now. For more information, see “Installing PEPs and Service Update packs” on page 119.

Backing up the server

Create a Platform Recovery disk (see page 219) and a database backup of the server (refer to the *Administrator's Guide*).

Chapter 9

Upgrading, converting and reinstalling client software

In this chapter

Upgrading client software	232
Converting the client from Release 1.1 or Release 1.5 to Release 3.0	240
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Upgrading client software

Introduction

This chapter describes

- how to upgrade client software from within Symposium Call Center Server Release 3.0
- how to convert Symposium Call Center Server client software from Release 1.1 or Release 1.5 to Release 3.0. This process requires the additional step of preconversion.
- how to reinstall client software

Checklist for client software upgrade

Steps	✓
Obtain the user ID and password that you need to log on to the client. On a Windows NT client PC, you need an account that has local administrative privileges.	
Check the “Before you begin” section on page 233.	
Upgrade the client software. See page 234.	
Upgrade the Symposium Call Center Server client software. See page 241.	
Check whether PEPs must be installed. See page 245.	

ATTENTION

You cannot downgrade to a previous version of the Symposium Call Center Server client software.

Before you begin

Follow the steps in the upgrade checklist

See the preceding Checklist for client software upgrade.

Update DLLs

During the upgrade, you might see dialog boxes that offer to update system DLL files with newer versions. Write down the names of these DLL files. If the files being installed are newer than the existing versions, click Yes. If they are older, click No. Provide the list of replaced DLLs to the system administrator.

Select all PEPs to uninstall

During the upgrade, Performance Enhancement Packages (PEPs) are listed as components to uninstall in the Programs to Install/Upgrade window. PEPs must be uninstalled as part of the upgrade. Ensure that all items in the window are selected so that the PEPs are uninstalled.

Check whether you have Acrobat Reader 3.0 with search plug-in

When client software is first installed, the installation procedure instructs you to install Acrobat Reader 3.0 from the Client CD. The Acrobat Reader 3.0 version on the Client CD includes the search plug-in. This is an enhancement to Acrobat Reader, which provides the capability to search for keywords across the suite of online documentation. If Acrobat Reader 3.0 is not already installed on the client PC, then the upgrade program notifies you.

The client upgrade program does not automatically install Acrobat Reader 3.0. However, a copy of this software is available on the client CD in the Acrobat folder. During the upgrade, you are asked if you wish to install Acrobat Reader from the client CD.

You should, therefore, check to see if Acrobat Reader 3.0 or higher is already installed on the client PC. If it is installed and you do not want to replace it with the version on the client CD, make sure that you also have the search plug-in (Asrch32.api) installed.

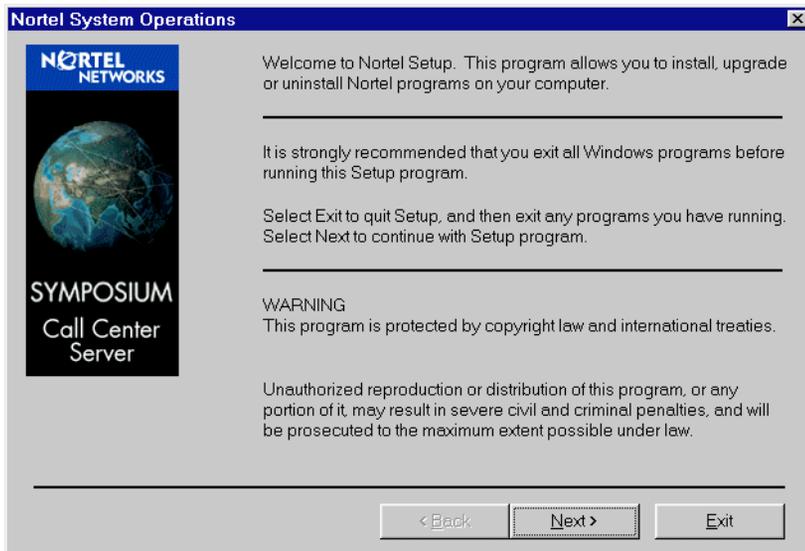
To upgrade the client software**ATTENTION**

During the upgrade installation, there are points where the setup program performs automatic installation steps in between wizard setup windows. Do not close any windows that appear during these steps. Wait for the next wizard setup window before you use the mouse or keyboard.

- 1 Exit all applications and close all windows.
- 2 Insert the upgrade Client CD or, if you are upgrading from a remote CD-ROM or a network share, map the upgrade Client CD to a drive letter on the client PC.
- 3 From the Windows Start menu, choose Run.
- 4 Click Browse, and then select Setup.exe from the root directory on the CD.

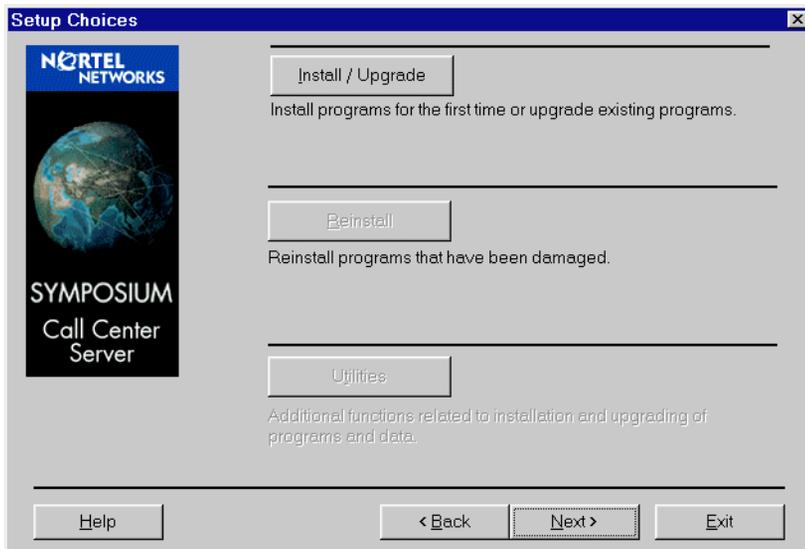
- 5 Click OK to run.

Result: The Nortel System Operations welcome dialog box appears.



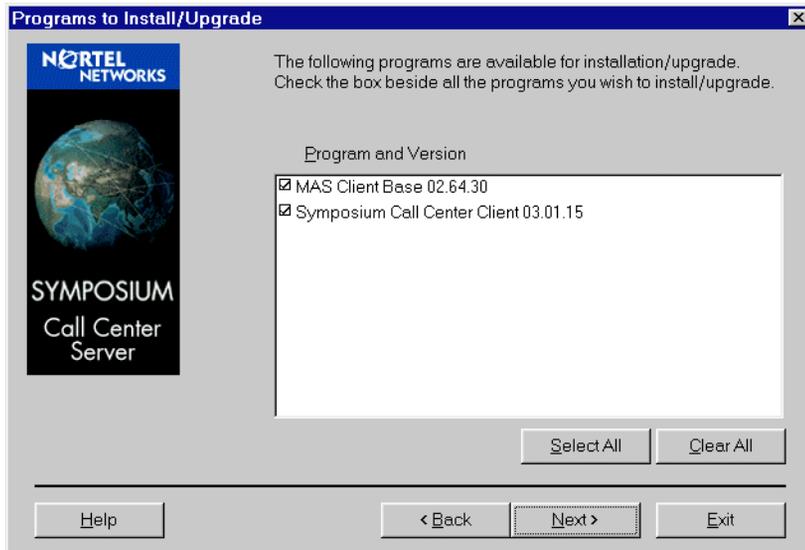
- 6 Click Next.

Result: The Setup Choices dialog box appears.



7 Click Install/Upgrade.

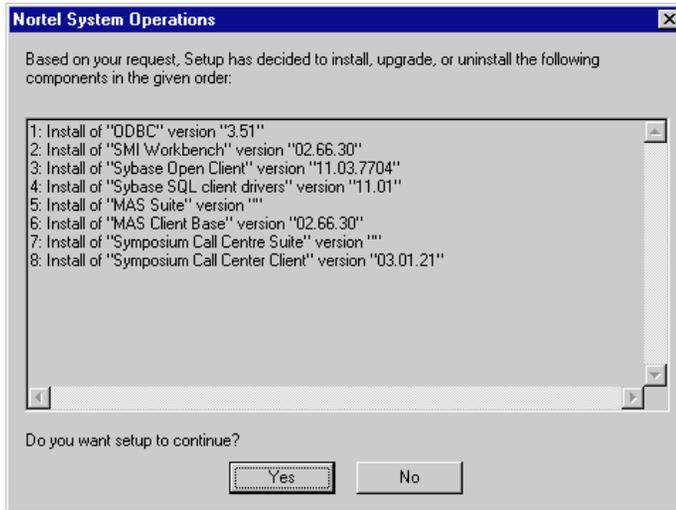
Result: Setup examines the system, and the Programs to Install/Upgrade dialog box appears.



Note: If Performance Enhancement Packages (PEPs) have been installed, they are listed in this window as components to uninstall. PEPs must be uninstalled as part of the upgrade. Ensure that all items in the window are selected, including PEPs.

- 8 Click Select All, and then click Next.

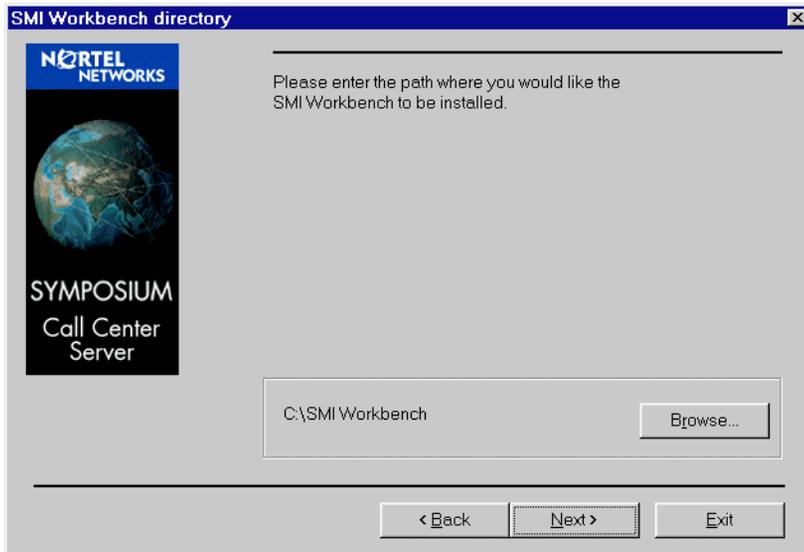
Result: The Nortel System Operations dialog box appears and lists all components in the order in which they will be installed.



Note: Information on screens varies depending on the components that are being upgraded and the client PC configuration.

- 9 Click Yes.

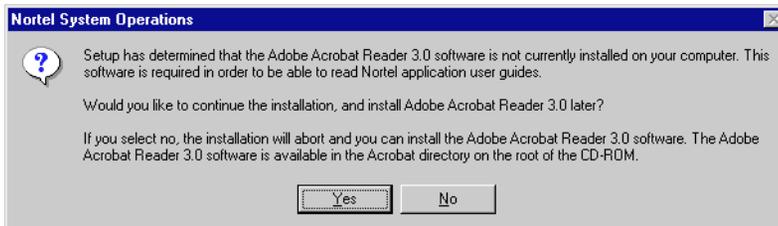
Result: Setup copies files to the client, and the SMI Workbench directory dialog box appears.



- 10 If you do not want to install the SMI Workbench in the default location, click Browse and type the path to the new location.

- 11 Click Next.

Result: The setup program checks to see whether the required version of Adobe Acrobat Reader is installed. If it is not installed, the following dialog box appears. Continue with the following step. If it is installed, Setup copies the Symposium Call Center Server client software to the client PC. Skip to step 13.



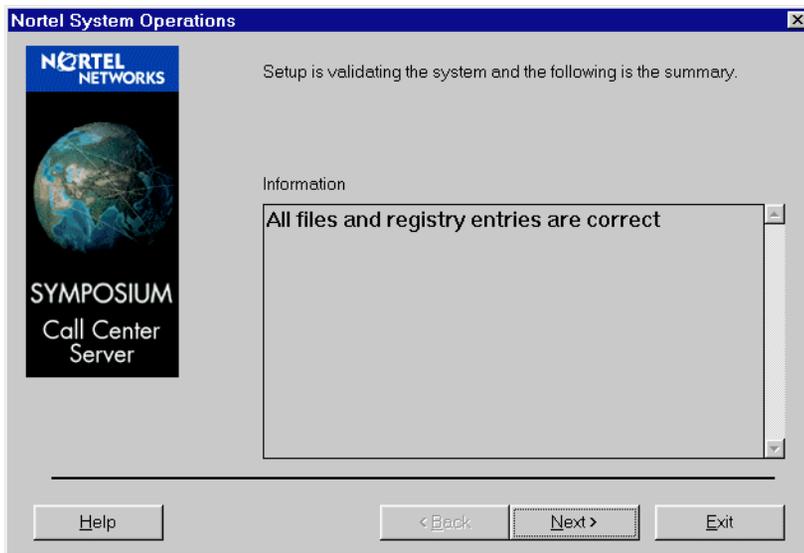
- 12 If Acrobat is not installed, click No and then complete the following steps:

- a. Insert the Client CD and locate the Adobe directory.
 - b. Click the file setup.exe.
 - c. Follow screen instructions to install Acrobat Reader.
 - d. Begin the installation again.
- 13 If the message msrd2X32.dll appears, click OK. This message is for informational purposes only and the file is copied automatically to the client PC if it is not found.

Note: If information messages appear while installing on a Windows NT workstation environment, click OK and proceed with the installation.

- 14 When all files have been copied, click Next.

Result: The validation summary dialog box appears.



- 15 Click Next if the summary is correct. If the summary is incorrect, click Back and make the necessary corrections before proceeding.

Result: The message Would you like to view the Readme file? appears.

- 16 Click Yes to read the file and No to ignore the message.
- 17 Click OK to restart the system.

Result: The upgrade to the client PC is complete.

Converting the client from Release 1.1 or Release 1.5 to Release 3.0

Introduction

Follow these procedures to convert Symposium Call Center Server client software from Release 1.1 or Release 1.5 to Release 3.0. The conversion is a two-step process. In the first step, you complete the preconversion process. In the second step, you upgrade the Symposium Call Center Server client software. Both procedures are performed using only one CD.

Note: Release 1.1 conversion is supported only on Windows 95 and Windows 98. Release 1.5 conversion is supported on Windows 95, Windows 98 and Windows NT 4.0 Workstation.

Upgrading from Release 1.0

To upgrade from Symposium Call Center Server Release 1.0 to Release 3.0, you must first upgrade to Release 1.5. To upgrade to Release 1.5, refer to the document *Symposium Call Center Server Upgrade Instructions from Release 1.0 to Release 1.5* that accompanies the Upgrade CD.

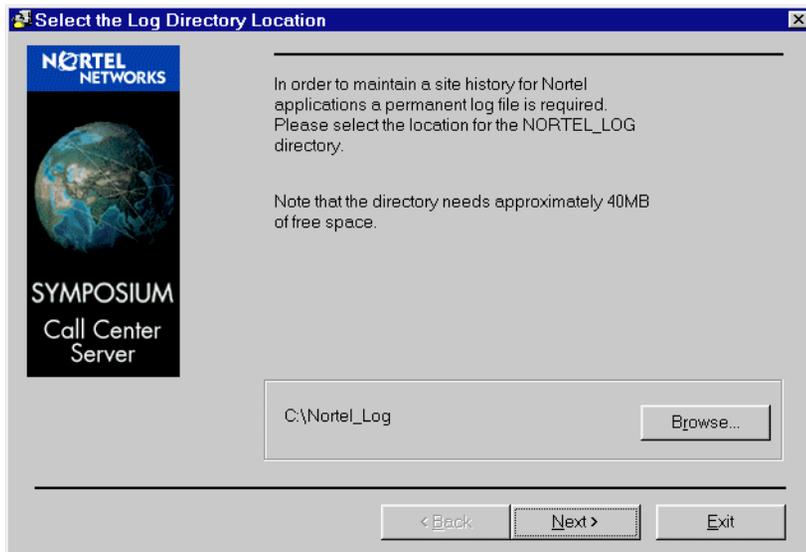
To perform the client preconversion process

- 1 Log on to the client PC.
Note: If the client PC is running Windows NT Workstation, log on as Administrator. You must be logged on with administrative privileges to install, upgrade, or convert Symposium Call Center Server software.
- 2 Exit all applications and close all windows.
- 3 Insert the Symposium Call Center Server Client Application Release 3.0 CD into the CD-ROM drive. If you are installing from a remote CD-ROM or a network share, then map the Symposium Call Center Server Client CD to a drive letter on the client PC.
- 4 From the Windows Start menu, choose Run.

- 5 In the Open box, type **E:\Setup.exe**, where E is the drive letter of your CD-ROM drive, and then click OK.
- 6 When the Please close any running applications dialog box appears, click Start to launch the preconversion utility on the Client CD.
Note: The preconversion process takes about 15 minutes to run.
- 7 When the message Pre-conversion has completed successfully appears, click OK.
Result: The preconversion process is complete.

To upgrade the Symposium Call Center Server client software

- 1 When the message Setup determines that DMI is not installed appears, click Yes.
Result: The Select the Log Directory Location window appears.



- 2 If you do not want to install in the default path C:\Nortel_Log, click Browse and enter the new path.

3 Click Next.

Result: DMI installs in the specified location and the Welcome window appears.

Note: Installation of the DMI takes approximately one minute.

4 Click Next.

Result: The Setup Choices window appears.

5 Click Install/Upgrade, and then click Next.

Result: The Programs to Install/Upgrade dialog box appears.

6 Select all programs listed, and then click Next.

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

Note: At the message Setup has determined that the SMI Workbench cannot integrate with the version of MAT on your system. Would you like to continue with the installation, click Yes to continue.

7 Click Yes.

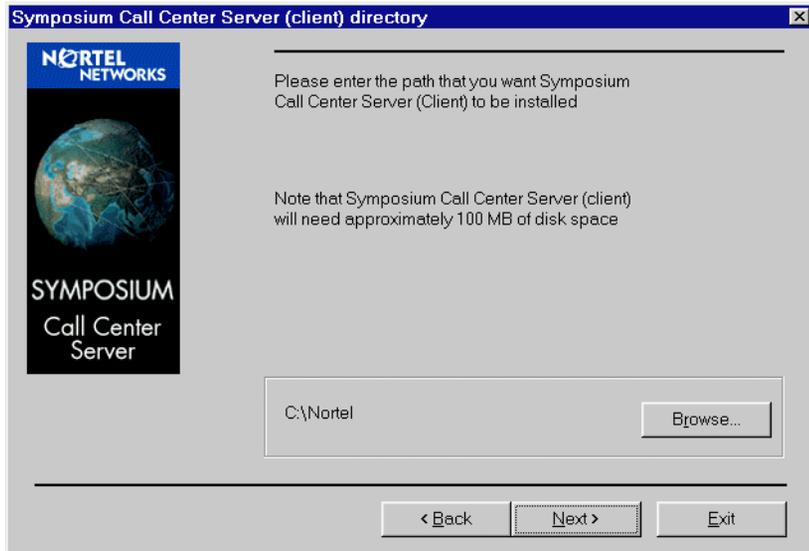
Result: The SMI Workbench window appears.

8 If you do not want to install the SMI Workbench in the default path, click Browse and type the new path.**9** Click Next.

Result: The setup program checks whether the required version of Adobe Acrobat Reader is installed. If Acrobat Reader is not installed, then follow the instructions on page 238 to install Acrobat Reader.

- 10 Click Yes.

Result: The Symposium Call Center Server (client) directory window appears.

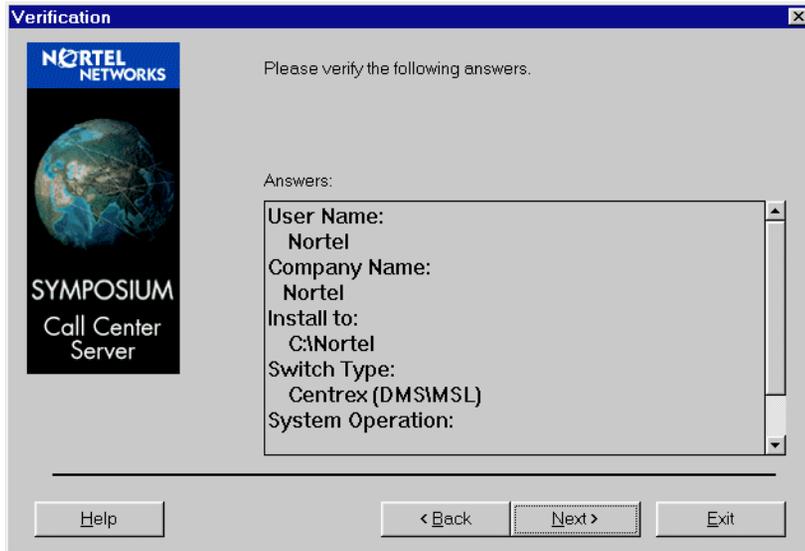


- 11 If you do not want to install the client software in the default path, click Browse and enter the new path.

12 Click Next.

Note: The client conversion process takes about 15 minutes to complete.

Result: The Verification dialog box appears.



Note: The information shown in the Verification dialog box varies depending on the system type.

13 Review the information listed. To continue, click Next. To make changes, click Back.

Note: If the message `Cannot find msrd2x32.dll` appears, you can ignore it. This file is automatically copied over from the Client CD if it is not found.

14 Click Next.

Result: You are asked if you want to read the readme file.

15 Choose whether you want to read the readme file. If you choose to view the readme file, close it when you are finished.**16** Click Yes to restart the computer.

Result: The computer restarts, and the client upgrade is complete.

What's next?

1. If you received a PEP CD, you should install the PEPs now. For instructions, refer to Chapter 5, "Installing PEPs and Service Update packs."
2. If you do not have a PEP CD, or after you install the PEPs, you must add an SMI system. See Chapter 7, "Adding a System Management Interface system."

ATTENTION

When you log on to the server for the first time, you must log on as sysadmin. The application prompts you to change your password. After the sysadmin user changes his or her password, other desktop users can log on. They will also be prompted to change their passwords.

Reinstalling client software

When to use

Use this procedure

- to reinstall the Symposium Call Center Server client application when it is damaged
- to add features (such as the NCC Reports option)

Note: You cannot change the switch type by reinstalling the software. You must uninstall the client and perform a fresh install.

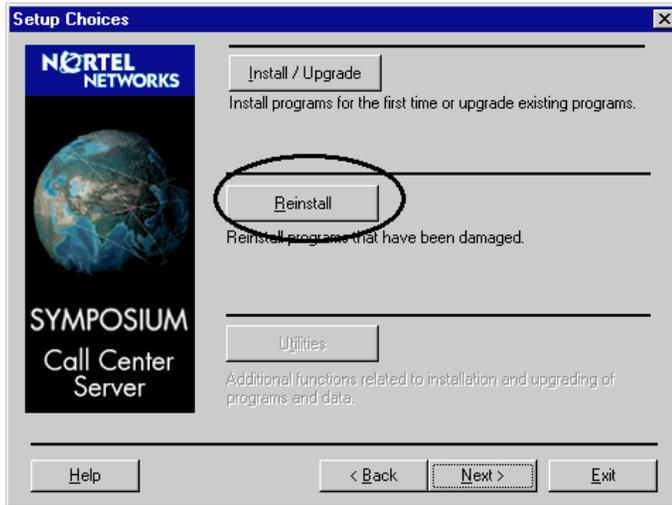
A reinstallation can be done only on a client that has already been installed properly. For example, if you have a working client that suddenly has problems in the application software, you can try to reinstall the application software.

If you encounter a problem during a new installation, then you must uninstall and do the installation again.

The reinstallation does not repair data files.

To reinstall client software

Follow the instructions for a client installation on page 130. However, instead of clicking Install/Upgrade in step 10 on page 134, click Reinstall. See also “Checklist for client software upgrade” on page 233.



To reinstall NCC Reports (Meridian 1 only)

If the NCC Reports option was selected during installation, then NCC Reports appears as a component to be reinstalled. During the reinstallation, all NCC report templates are copied to the client PC.

To reinstall NCC Reports during a software upgrade or conversion, follow the instructions for a client upgrade, as described in “Checklist for client software upgrade” on page 233. However, click Reinstall in the Setup Choices window. Then, from the Setup Choices window, select the NCC Reports option.

Note: The only method of adding NCC Reports functionality during an upgrade or conversion is to use the Reinstall option. Reinstallation cannot be used to remove previously installed NCC Reports.

Chapter 10

Using server utilities

In this chapter

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Overview

Introduction

Symposium Call Center Server utilities are automatically installed when you install the Symposium Call Center Server. These utilities allow you to perform system operations not available within Symposium Call Center Server.

You can access the server utilities from the Windows Start menu by choosing Programs → Symposium Call Center Server.

Utility name and function overview

Utility name	Function
Computer Name Sync	Updates the computer name in the Symposium Call Center Server database.
Configuration (Nbconfig Configuration Tool)	Enables you to add and modify site information for a Symposium Call Center Server network.
Database Restore	Restores the database from a backup tape.
DMI View	Shows the software suites that are managed by the Database Management Interface (DMI) and related information. Also allows you to view and remove Product Enhancement Packages (PEPs) installed on the system.
Feature Report	Enables you to view and modify switch parameters. It also enables you to view other system information and a list of installed features.
Migration	Allows you to obtain system information in preparation for migrating to another hardware platform.
Registry Maintenance	Performs a registry comparison. This utility enables you to check for any corruption or change in the registry.

Utility name	Function
Shutdown/Startup (separate utilities)	Shuts down and starts up certain Symposium Call Center Server services. This is required for some maintenance and troubleshooting activities.
System information	Shows particulars about the Symposium Call Center Server System, such as names, IP addresses, and system numbers.
Uninstall	Lets you uninstall the Symposium Call Center Server application.

Computer Name Sync

Introduction

If you change the computer name after installing the Symposium Call Center Server, use this utility to synchronize the Symposium Call Center Server name and the current computer name.

Notes:

- This utility also updates the DNS Host Name to match the new computer name.
- This utility does not change the database's name. Make sure you keep a record of the original name, in case you need to do a full system recovery.

Computer name restrictions

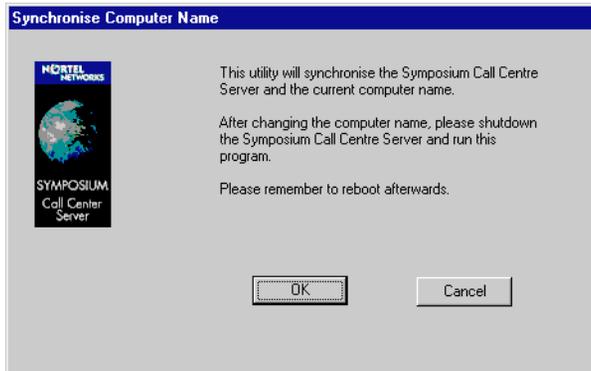
The new computer name must be a single word without spaces, 6 to 15 characters long. Letters, numbers, a hyphen, and a dash are allowed.

To change the computer name

- 1 First change the new computer name in Windows NT by choosing, from the Windows Start menu, Control Panel → Networks.
- 2 Restart the server.
- 3 From the Windows Start menu, choose Programs → Symposium Call Center Server → Shutdown.

- 4 From the Windows Start menu, choose Programs → Symposium Call Center Server → Computer Name Sync.

Result: The Synchronise Computer Name dialog box appears.



- 5 Click OK.
- 6 When this utility finishes, restart the server.

Configuration overview

Introduction

Use this utility to display and change configuration information. You can also make changes to the IP addresses of the CLAN and ELAN adapter cards if you made an error during installation.

Note: To change an IP address, you must start the Configuration utility with the admin access level. For more information on changing IP addresses, refer to “Changing the server IP address or site name” on page 256.

Access levels

Two access levels are available in the Configuration utility: regular and admin. In the regular access level, all information is read-only. In the admin access level, you can make changes.

Modes

Two modes are recognized within the Configuration utility: server mode and NCC mode. In server mode, you can see the current settings on the server PC. In NCC mode, you can see information about all PCs in the network.

In NCC mode, you cannot add another NCC, enter a duplicate site name, or enter a Name Service IP address other than from the ELAN. In addition, if the new site cannot be connected, the Configuration utility allows you to remove the site.

Note: In NCC mode, you do not need to shut down services to make changes.

To start Nbconfig with the regular access level

From the Windows Start menu, choose Programs → Symposium Call Center Server → Configuration.

Result: The Nbconfig window appears showing three tabs:

- Local Machine Settings

- Address Table
- Site Table

To start Nbconfig with the admin access level

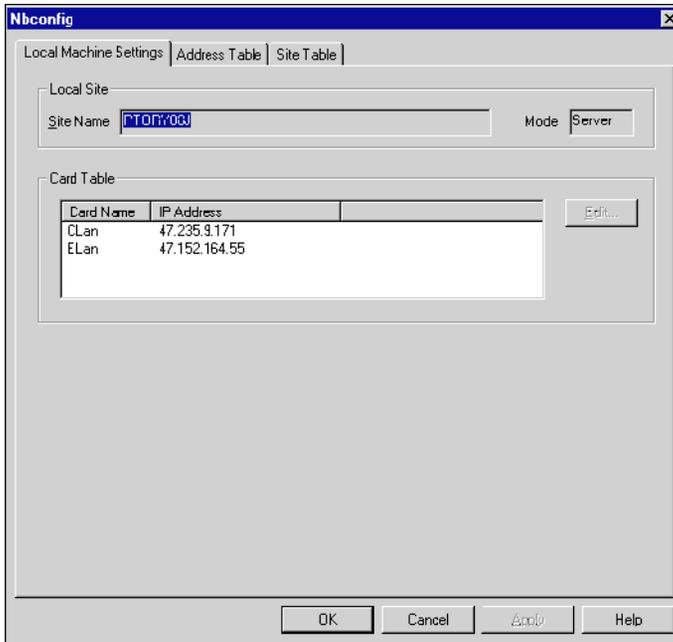
- 1 From the Windows Start menu, choose Run.
- 2 Type **nbconfig -admin** and click OK.

Result: The Nbconfig window appears.

Configuration: Local Machine Settings

Introduction

The Local Machine Settings tab displays Local site name and network card IP addresses.



For more information on Nbconfig for the NCC, refer to the *Symposium Call Center Server Network Control Center Administrator's Guide*.

Changing the server IP address or site name

To change the IP addresses on the Symposium Call Center Server, you must make this change in the following places:

- Change the IP addresses in the Network control panel.
- Change the IP addresses in the Configuration utility (NBCOM).

At installation time, the IP addresses are defined in the Network control panel and then again during the server software installation. All IP addresses must be unique. No further action is required unless you need to change the IP addresses after installation.

To change the CLAN or ELAN IP address

- 1 Log on to Windows NT as NGenSys.
- 2 Close the SMonW window.
- 3 Shut down all Symposium Call Center Server services (from the Windows Start menu, choose Programs → Symposium Call Center Server → Shutdown).
- 4 Change the CLAN or ELAN IP address using the Network control panel. See “Configuring TCP/IP for ELAN, CLAN, and Remote Access Service” on page 49.
- 5 When the program prompts you to restart the server, click No.
- 6 Change the CLAN or ELAN IP address using the Configuration utility (Nbconfig) as follows:
 - a. From the Windows Start menu, choose Run.
 - b. Type **nbconfig -admin**.
Result: The Edit button on the Local Machine Settings tab is enabled.
 - c. Select the network card for which you want to change the IP address.
 - d. Click Edit.

Result: The Network Card IP Address window appears to allow you to select another CLAN or ELAN IP address from the drop-down list.



- e. Make the changes and click OK.
- 7 Run nicomsetup.
 - a. From the Windows Start menu, choose Programs → Command Prompt.

To change the server site name

- 1 Log on to Windows NT as Administrator.
- 2 Close the SMonW window.
- 3 Shut down all Symposium Call Center Server services (from the Windows Start menu, choose Programs → Symposium Call Center Server → Shutdown).
- 4 Run `nicomsetup`.
 - a. From the Windows Start menu, choose Programs → Command Prompt.
 - b. Change to the drive on which the Symposium Call Center Server is installed. For example, type `D:\` and press Enter.
 - c. Type `CD\Norte\ICCM\bin` and press Enter.
 - d. Type `nicomsetup` and press Enter.
- 5 Change the server site name using the Configuration utility (Nbconfig) as follows:
 - a. From the Windows Start menu, choose Run.
 - b. Type `nbconfig -admin`.

Result: The Edit button on the Local Machine Settings tab is enabled.
 - c. Make the desired changes, and click OK.
- 6 If the server is in a networking environment, continue with one of the following procedures to update the NCC.

Changing the site name of a server in a networking environment (Meridian 1 only)

- 1 At the NCC, log on as Administrator, and from the Windows Start menu, choose Run.
- 2 Type `nbconfig -admin`.
- 3 Click the Site Table tab.
- 4 Select the server for which you changed the site name, and click Remove.
- 5 Click Add and add the server.
- 6 Click Verify.
- 7 Click Apply to start synchronization.

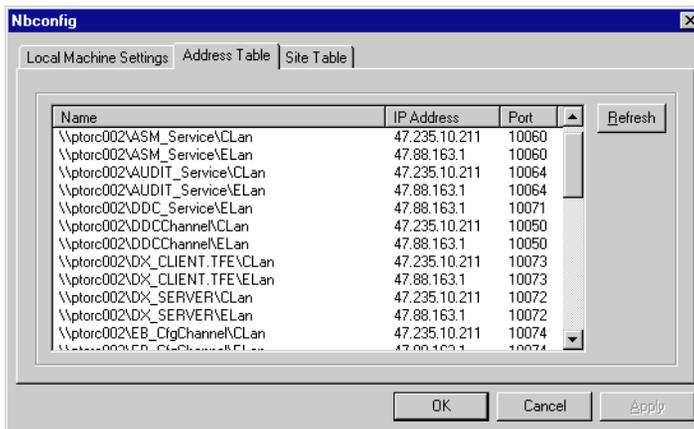
Changing the site name of the NCC (Meridian 1 only)

- 1 At the NCC, log on as Administrator, and from the Windows Start menu, choose Run.
- 2 Type **nbconfig -admin**.
- 3 Click the Site Table tab.
- 4 Click Add and add all servers.
- 5 Click Verify.
- 6 Click Apply to start synchronization.

Configuration: Address Table

Introduction

The Address Table tab lists computer name, IP Address, and Port information of all servers in the network, including the NCC. In regular Server mode, all information is read-only. You can modify information from the Address Table by entering the admin access level.

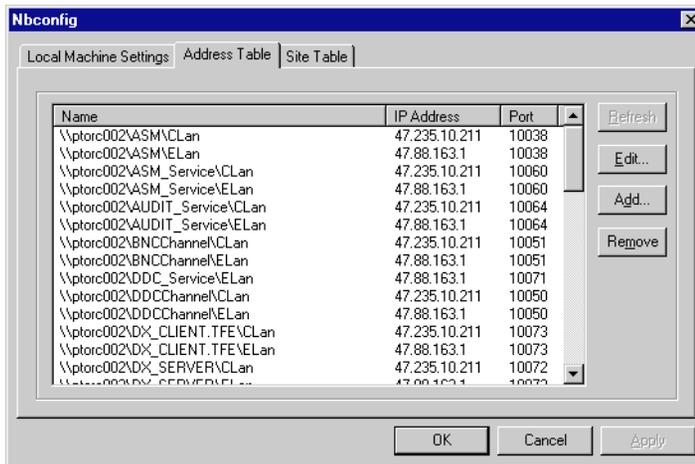


To edit, add, or remove address information

- 1 Log on to Windows NT as Administrator.
- 2 Shut down all Symposium Call Center Server services (from the Windows Start menu, choose Programs → Symposium Call Center Server → Shutdown).
Result: All services are shut down.
- 3 From the Windows Start menu, choose Run and type **nbconfig -admin**.

- 4 Click the Address Table tab.

Result: The Nbconfig window now shows an Edit, Add, and Remove button.



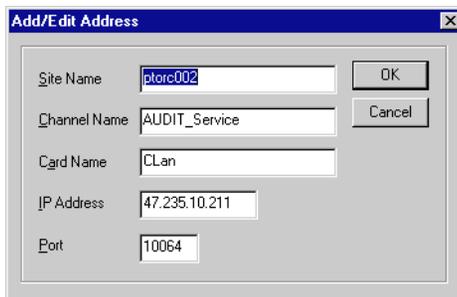
- 5 To remove a server, select it and click Remove.

- 6 To add a server, click Add.

Result: The Add/Edit Address window appears. The fields in this window are blank. Continue with step 8.

- 7 To change a server, select it and click Edit.

Result: The Add/Edit Address window appears.



- 8 Enter the desired information and click OK.

To run the nicomsetup utility

Run the nicomsetup utility after a site name change to clear information from the Address Table and Site Table window.

- 1 From the Windows Start menu, choose Programs → Command Prompt.
- 2 Change directories to Nortel\NICCM\bin.
 - a. Type **CD** and press Enter.
 - b. Type **CD\Nortel\NICCM\bin** and press Enter.
- 3 Type **nicomsetup** and press Enter.

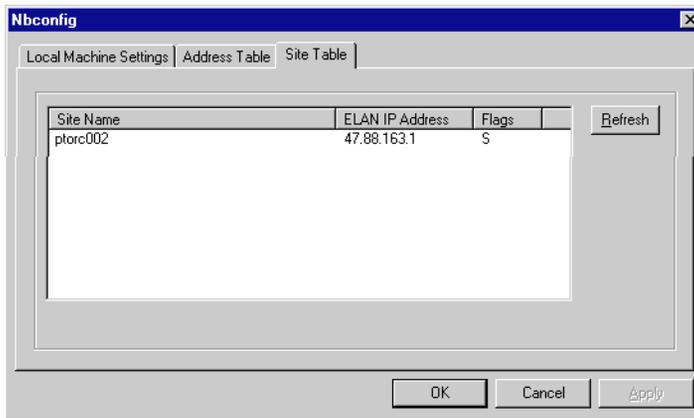
Result: All information is removed from the Address Table window and from the Site Table window.

For more information on adding site names in a network, refer to the *Symposium Call Center Server Network Control Center Administrator's Guide*.

Configuration: Site Table

Introduction

The Site Table tab lists information about Site Names, IP Addresses, and flags. In Server mode, this information is for reference only and cannot be edited. In NCC mode, you can add sites.



To add a site (NCC mode only)

- 1 From the Windows Start menu, choose Run and type **nbconfig -admin**.
- 2 Click the Site Table tab.
- 3 Click Add and add a site.

For more information on adding site names in a network, refer to the *Symposium Call Center Server Network Control Center Administrator's Guide*.

Database Restore

Introduction

Use this utility to restore a corrupted database. This utility restores the backed-up version of the database created using the backup utility with the database option. For more information about backing up and restoring, refer to the *Symposium Call Center Server Administrator's Guide*.

To access the Database Restore utility

From the Windows Start Menu, choose Programs → Symposium Call Center Server → Database Restore.

Result: The Database Restore dialog box appears.



With the backup tape, click Start Restore to restore the database.

Checking the restore status

The Database Restore utility creates a log file, named Restore.log, in the path D:\Nortel\data\backup\RestoreLogs. Use a text editor, like Notepad, to open the log file and check the status of the restore.

DMI View

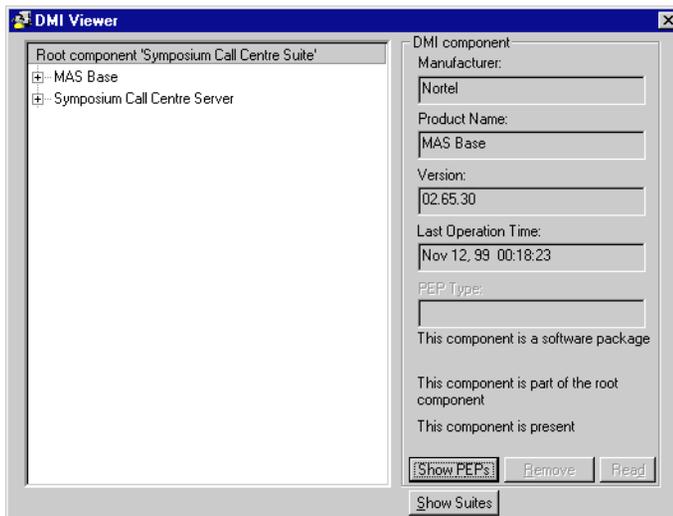
Introduction

Use this utility to show the software suites that are managed by the Database Management Interface (DMI) and related information. Use this utility also to view and remove Product Enhancement Packages (PEPs) installed on the system.

To access the DMI View utility

From the Windows Start menu, choose Programs → Symposium Call Center Server → DMI View.

Result: The DMI Viewer window appears.



To view all installed PEPs, click the Show PEPs button.

Feature Report overview

Introduction

Use this utility to display system information and a list of installed features. The following illustration shows the Feature Report tabs:



Modifiable information

Only the Switch Information tab contains information that you can modify. All other tabs contain read-only information.

To access the Feature Report utility

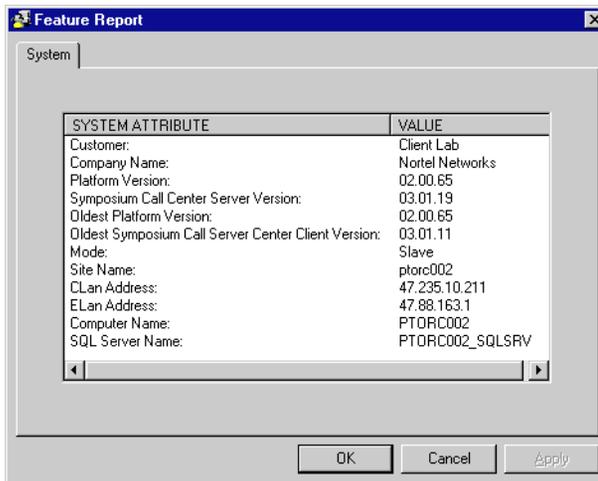
From the Windows Start menu, choose Programs → Symposium Call Center Server → Feature Report.

Result: The Feature Report window appears. See the following pages for a description and example of the Feature Report tabs.

Feature Report: System

Introduction

The System tab lists information entered at installation, including computer name, IP addresses, and site name. You cannot edit any of the items showing in this window, as it contains read-only information.



Note: In a networked environment, the NCC site name and IP address are automatically updated after the server is added to the list of sites on the NCC.

Feature Report: Switch Information

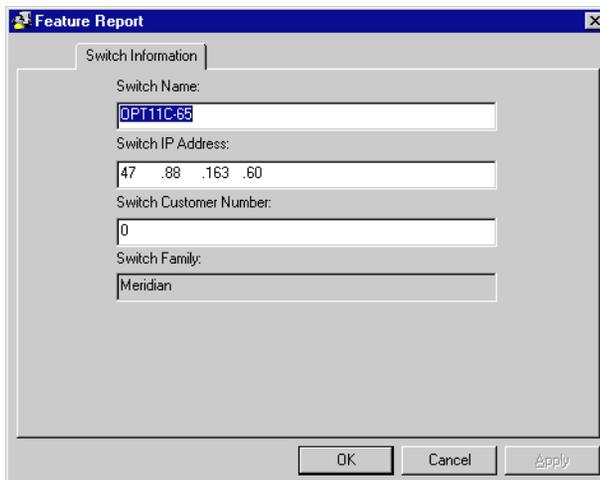
Introduction

The Switch Information tab lists switch information and parameters. This information is initially provided during server software installation, but you can modify it after installation through the Feature Report utility - Switch Information tab.

To view or change switch information

- 1 From the Windows Start menu, choose Programs → Symposium Call Center Server → Feature Report.
- 2 Select the Switch Information tab.

Result: The Switch Information tab appears. The following example is for a server connected to a Meridian 1 switch. For servers connected to an M1 switch, the Switch Information tab shows different information.



The screenshot shows a window titled "Feature Report" with a tab labeled "Switch Information". The window contains the following fields:

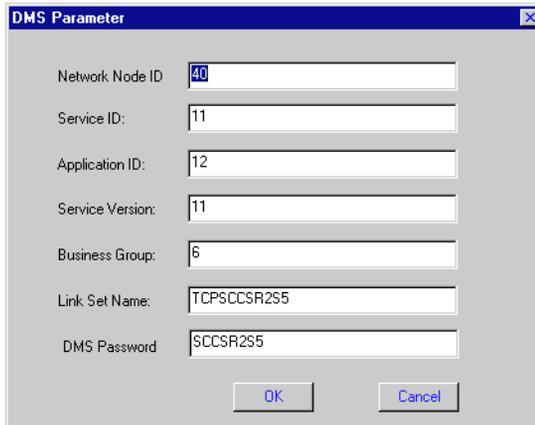
- Switch Name: OPT11C-65
- Switch IP Address: 47 .88 .163 .60
- Switch Customer Number: 0
- Switch Family: Meridian

At the bottom of the window are three buttons: "OK", "Cancel", and "Apply".

- 3 Modify any switch information, if required.

- 4 For DMS/MSL-100 systems, click Edit DMS Switch Parameters. For Meridian 1 systems, there is no additional switch parameters screen.

Result: The DMS Parameter dialog box appears.



The screenshot shows a dialog box titled "DMS Parameter" with a close button in the top right corner. The dialog box contains the following fields and values:

Field	Value
Network Node ID	40
Service ID:	11
Application ID:	12
Service Version:	11
Business Group:	6
Link Set Name:	TCPSCSR255
DMS Password	SCCSR255

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

- 5 Modify switch parameters, if required.

- 6 To save changes, click OK.

Result: The Switch Information tab appears.

- 7 To save changes, click OK.

Result: You are prompted to restart to save changes.

- 8 Restart the server.

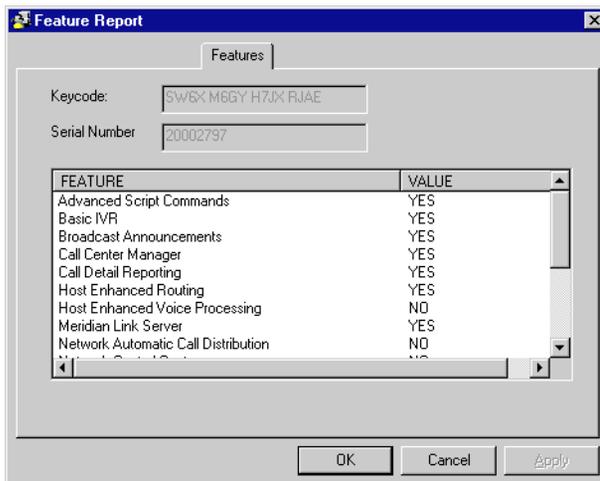
Result: The switch information is now updated on the server.

Feature Report: Features

Introduction

The Features tab lists product features, and specifies which features are installed on the server. The features that are installed depend on what features were purchased and the keycode entered during server installation.

This tab contains read-only information.

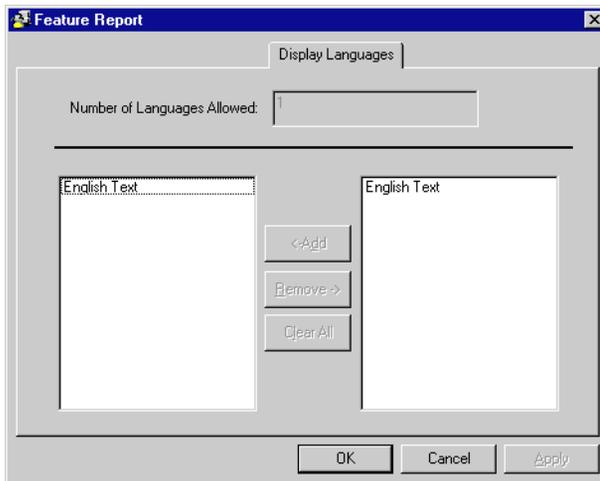


Note: The value YES indicates that a feature is installed. The value NO indicates that the feature is not installed.

Feature Report: Display Languages

Introduction

The Display Languages tab lists the languages that are installed for information that appears on the screen. This tab contains read-only information. The Add, Remove, and Clear All buttons are not selectable.



Feature Report: Voice Prompt Languages

Introduction

The Voice Prompt Languages tab lists the languages that are installed for voice prompts. This tab contains read-only information. The Add, Remove, and Clear All buttons are not selectable.



Migration

Introduction

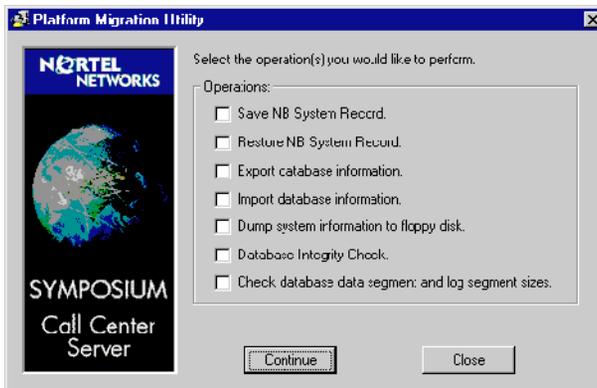
Use this utility

- to obtain system information in preparation for migrating to another hardware platform
- after installation, upgrade, conversion, or changes to the server configuration, to create a Platform Recovery disk

To access the Migration utility

From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

Result: The Migration dialog box appears, providing operations that you can perform.



To use this utility, check one of the following options, and then click Continue.

Registry Maintenance

Introduction

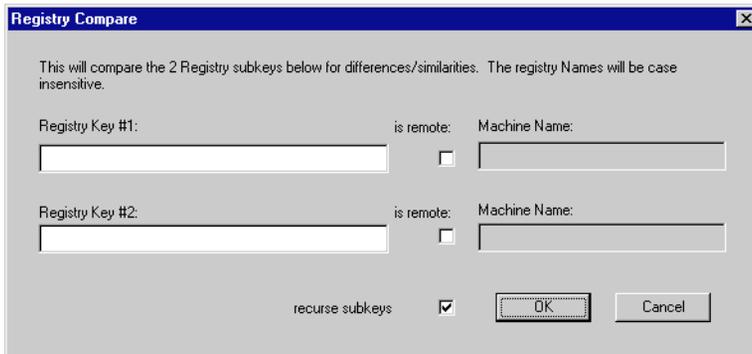
Use this utility to perform a registry comparison between two remote machines, a remote and a local machine, or two subkeys on the local machine. This utility also has backup and restore capabilities.

The comparison picks up any difference between the two registry entries, such as values with the same name but different data, and values or subkeys that exist on one registry but not on the other. Filtering options are available.

To access the Registry Maintenance utility

From the Windows Start menu, choose Programs → Symposium Call Center Server → Registry Maintenance.

Result: A blank white screen with a menu bar appears. For example, when you choose Registry Compare, the following screen appears inside the Registry window.



Filtering options

Registry Compare

This option, as shown in the illustration, compares two registry subkeys for similarities and differences.

Registry Error Detection

This option compares the structure of the registry with the structure in an input file. Any differences between the two are noted, including different data and missing/extra keys/values. The input file is editable, and you can customize it to have a set or range of accepted values for certain keys instead of a fixed value.

Registry Dump

This option recursively dumps the structure of the registry starting from a given subkey. This option is an easy method for generating an initial input file for the detection option.

Shutdown

Introduction

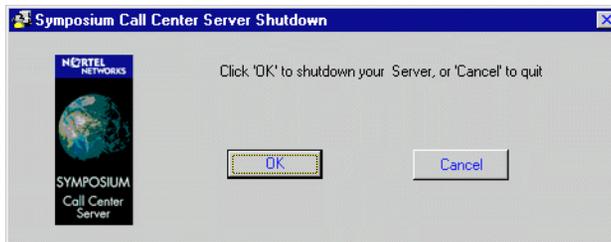
Use this utility to shut down Symposium Call Center Server services. This might be required prior to performing some maintenance activities.

This utility informs you about the state of each service and describes each action taken by the utility. At the end, the utility provides general information on whether the system is completely shut down and provides appropriate messages if there are services that cannot be shut down for some reason. The utility also reports any errors encountered during execution of the shutdown.

To access the Shutdown utility

- 1 From the Windows Start menu, choose Programs → Symposium Call Center Server → Shutdown.

Result: The Symposium Call Center Server Shutdown dialog box appears.



- 2 Click OK.

Result: The Summary dialog box appears. It shows any services that are still running. You can click Recheck to refresh the service statuses.

- 3 If any services are still running, use the control panel services icon to manually shut down the listed services and click Refresh to update the summary window.
- 4 Click Accept to exit utility.

Startup

Introduction

Use this utility to start up the Symposium Call Center Server services after they have been stopped by the Shutdown utility.

To access the Startup utility

From the Windows Start menu, choose Programs → Symposium Call Center Server → Startup.

Result: The Symposium Call Center Server Startup dialog box appears.



System Information

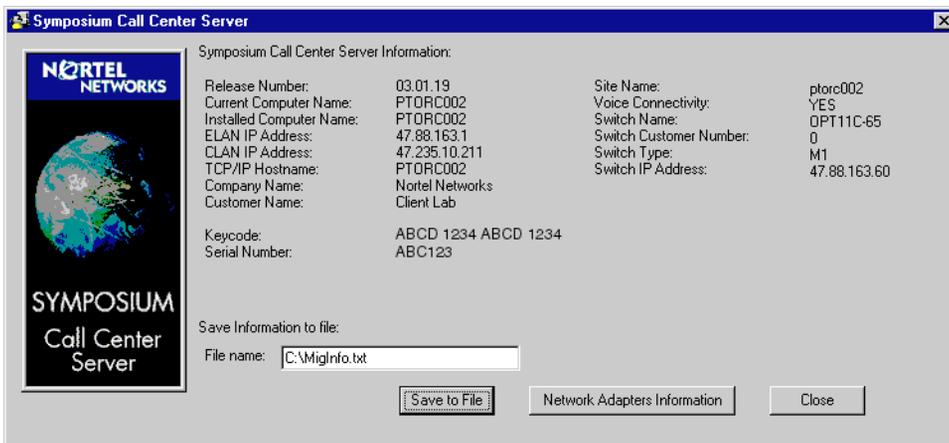
Introduction

Use this utility to view particulars about the Symposium Call Center Server System, such as names, IP addresses, and system numbers.

To access the System Information utility

From the Windows Start menu, choose Programs → Symposium Call Center Server → System Information.

Result: The Symposium Call Center Server information window appears.

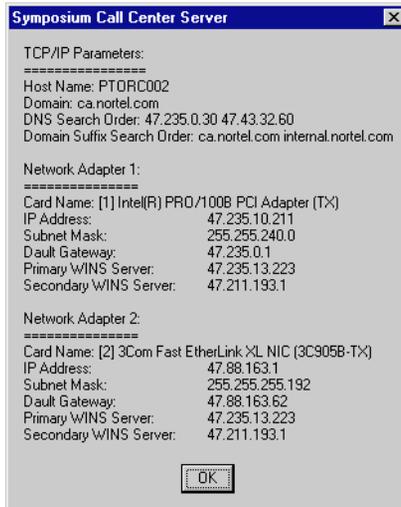


To use the System Information utility

Use this utility to view system information at a glance. You can also keep system information in a file on the computer or on a security floppy disk. To save a file, enter a path in the File name dialog box, such as C:\Mgtinfo.txt or A:\Mgtinfo.txt, and then click the Save to File button. A copy of all displayed information is saved in the file you just created.

To obtain Network Adapters Information

You can also obtain detailed information about network addresses by clicking the Network Adapters Information button. When you press this button, the following window appears:



After viewing the information on this screen, click OK to return to the System Information Utility main window.

Uninstall

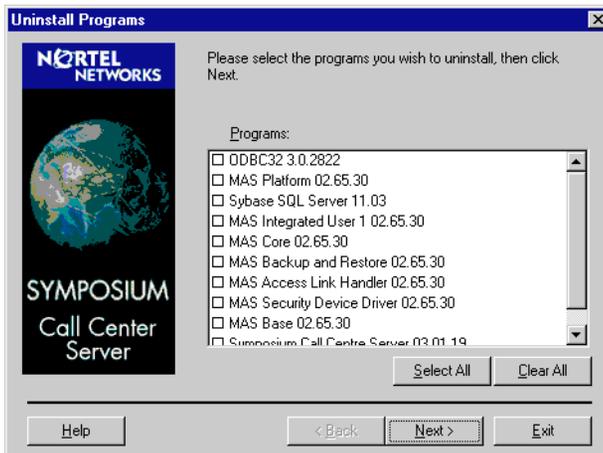
Introduction

Use this utility to uninstall the Symposium Call Center Server application. From the Uninstall main window, select the items you want to uninstall, and then click Next to start the uninstall wizard.

To use the Uninstall utility

- 1 From the Windows Start menu, choose Programs → Symposium Call Center Server → Uninstall.

Result: The Uninstall Programs window appears.



- 2 Click the items you want to uninstall, or click Select All.
- 3 Click Next and follow screen instructions from the uninstall wizard.

For more information on installing and uninstalling Symposium Call Center Server software, refer to “Installing the server software” on page 96 and “Installing the client from the distribution CD” on page 130.

Appendix A

Troubleshooting

In this appendix

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Troubleshooting the client-server connection	290
Troubleshooting problems with Symposium Call Center Server services	292
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Other documents	297

Troubleshooting installation problems

Introduction

To perform troubleshooting for the software installation, refer to the following chart. See “Other documents” on page 297 for more information and extended system-level troubleshooting.

When a system error occurs

For all errors, record the error messages, the system configuration, and actions taken before and after the error occurred. If the problem persists, contact your Nortel Networks Customer Support representative.

Troubleshooting chart for server installation problems

Symptom	Probable cause	Action
Error messages from the database setup during server installation.	Files copied incorrectly; other programs running on the server during installation.	<ul style="list-style-type: none"> ■ Uninstall, then reinstall the software. ■ Close any other programs running on the server (for example, Control Panel) before reinstalling.
Error messages at the end of the server software installation.	Files copied incorrectly.	Uninstall and then reinstall the software.
Blue screen appears during restart after pcANYWHERE installation.	Incompatible video driver.	<ol style="list-style-type: none"> 1 Press the Reset button to restart. 2 When prompted, select Windows NT VGA. 3 When the Last known configuration message appears, press the Reset button again. 4 Repeat steps 2 and 3 one more time. 5 When prompted, select Windows NT VGA. 6 Allow the server to start with the Last known good configuration. (After three failed restart attempts, pcANYWHERE switches to Fault Tolerant start mode.) 7 If you see the message A video compatibility problem caused pcANYWHERE32 to switch to the "Compatibility" video mode, click OK. 8 Uninstall pcANYWHERE (see "To uninstall pcANYWHERE32" on page 184).

Symptom	Probable cause	Action
		<p>9 Change the video driver (see “To change the video drivers” on page 213).</p> <p>10 Reinstall pcANYWHERE (see “To reinstall pcANYWHERE32” on page 215).</p> <p>11 If the problem is not resolved, contact your Nortel Networks Customer Support representative.</p>
Server fails to initialize with the switch.	<ul style="list-style-type: none"> ■ Incorrect switch parameters were entered during server installation. ■ For a DMS/MSL-100 switch, the dongle is not attached to the parallel port on the server. 	<p>Verify and change switch parameters defined on the server. See “Feature Report: Switch Information” on page 269.</p> <p>Connect the correct dongle to the port. Ensure the dongle ID matches the serial number entered during installation.</p>

Troubleshooting chart for client installation problems

Symptom	Probable cause	Action
Error messages at the end of the client software installation.	Files copied incorrectly.	Uninstall and then reinstall the software.
Client upgrade resets halfway through the setup.	This error occurs if, during the client upgrade, you choose to upgrade common Microsoft DLLs.	Reinstall the software. When you are informed of a newer or read-only version of a common Microsoft DLL, click No. Do not upgrade the file, as this causes the upgrade to fail.

Symptom	Probable cause	Action
Client software fails to start.	Possible client path overflow problem. The maximum length of the path is a function of the environment size, which depends on other parameters. To detect this problem, compare the path in the autoexec.bat file with the path shown by executing the command "path" at the command prompt.	<ol style="list-style-type: none"> 1 Try reducing the length of the directory path for installing the client application software, or uninstall another software application from the client PC. 2 Uninstall the Symposium Call Center Server client application, restart the client PC, and reinstall the Symposium Call Center Server client application.
Error message: Setup is not able to determine whether DMI service is running.	You are not logged on to the client PC as Administrator.	Log on to the client PC as Administrator, and start the installation again.

Further troubleshooting

For detailed maintenance and diagnostics procedures, refer to one of the following guides:

- *Meridian Application Server Installation and Maintenance Guide* for your server hardware platform
- *Symposium Call Center Server Administrator's Guide*

Troubleshooting network connection problems

Introduction

If the test described in “To test the ELAN and CLAN network connection” on page 70 fails, then follow these steps to verify that the server ELAN (and CLAN card if present) are configured and identified correctly.

Note: If you want to verify that the 1.1.1.1 placeholder address has been assigned to the ELAN card and that the 2.2.2.2 placeholder address has been assigned to the CLAN card, you can perform these steps before you configure the ELAN and CLAN cards.

Requirements

- A laptop or PC that is near the server and can be connected directly to the server. In this procedure, the laptop or PC is referred to as the client PC.
- A direct connect (crossover) network cable that allows two PCs to be directly connected without a hub in between them.

To resolve the failed ping

- 1 Plug the crossover network cable into the network card in the client PC.
- 2 Plug the other end into the ELAN card in the server.
- 3 If you must restore the IP address information of the client PC after this procedure, then record the TCP/IP IP address, subnet mask, and gateway of the client PC.
- 4 Configure the client PC with an IP address that is part of the same subnet as the IP address assigned to the ELAN card.

Example: If the server ELAN card has the IP address 1.1.1.1, then assign the laptop or PC an IP address of 1.1.1.2.

- 5 Set the client PC to have a subnet mask of 255.0.0.0. Leave the gateway blank.

- 6 Open an MS-DOS prompt window on the client PC and try to ping the server ELAN card. For example, if the server ELAN card has the IP address 1.1.1.1, then type **ping 1.1.1.1** and press Enter.

If the ping test succeeds, then you know that you have correctly identified the ELAN card in the network control panel.

The other network card, if present, must be the CLAN card.

- 7 From the server, repeat the steps described in “To test the ELAN and CLAN network connection” on page 70. If the sanity test fails again, then verify that the network is set up correctly.

Note: In a system recovery situation that requires a Windows NT reinstallation, remove the CLAN card before installing Windows NT. When you install Windows NT, configure the only network card remaining—the ELAN card—in the server.

Troubleshooting the client-server connection

Introduction

If the client cannot connect to the server, it displays a dialog box with the message `IP address is unreachable. Connection failed.` Click **OK** to dismiss the dialog box, and follow the steps in this section to solve the problem.

ATTENTION

If you discover that you must change the server's CLAN or ELAN IP address, see "Changing the server IP address or site name" on page 256. You must make IP address changes in Symposium Call Center Server utilities as well as in the Network control panel.

Things to check first

- 1 Check that all network cables are securely attached to the client PC and server.
- 2 Make sure that the SMI system is configured properly. Select the system in the SMI Workbench, and choose `File → System Properties`. The IP address and name should match the CLAN IP address and site name, respectively, specified on the worksheet in "Server and client software installation information" on page 16.
- 3 From the client, try to ping the server's CLAN IP address. If you are using a dial-up connection, then establish the modem connection before pinging.

Result: If the ping is successful, then the network is fine between the server and the client. If the pinging is not successful, then you might be using the wrong IP address for the server, or there might be a network problem.

To check the client PC

If using a dial-up connection to the server

- 1 Check that the Dial-Up Networking connection profile that you are using for the SMI system to connect to the server is set up correctly. Check that the dial-up connection information is correct (IP address for the server and phone number). For instructions on creating a dial-up connection profile, refer to the *Nortel Networks Symposium Call Center Server Software Administrator's Guide*.
- 2 Try to connect to other PCs on the local network to ensure that you are not having a local network problem.

If connecting to the server over the LAN

- 1 Check that the connection information for the SMI system is correct (IP address or computer name for the server). See "Adding an SMI system" on page 154.
- 2 Try to connect to other PCs on the LAN to ensure that you are not having a local network problem.

To check the server

- 1 Check that the network card TCP/IP addresses are correct. See "Configuring TCP/IP for ELAN, CLAN, and Remote Access Service" on page 49.

Note: If you must change the server's CLAN or ELAN IP address, see "Changing the server IP address or site name" on page 256.

(The remaining steps apply only if the client is using a dial-up connection to the server)

- 2 Check that the client PC's IP address is in the range of IP addresses defined for Remote Access Service (RAS) on the server. See "Configuring TCP/IP for ELAN, CLAN, and Remote Access Service" on page 49.
- 3 Check that Remote Access Service is started. See "To verify that the RAS service is set to automatic" on page 39.

Troubleshooting problems with Symposium Call Center Server services

The System Monitor window

The System Monitor Window (SMonW) displays automatically on the server PC as the software loads. This window shows the status of services. Some services take a few minutes to become active. When all services are running properly on the Symposium Call Center Server, the SMonW window shows the status of server services as UP.



ATTENTION

Only one SMonW window should ever be open at any given time. More than one open SMonW window causes services to shut down.

If a service has to be reactivated or refreshed, then click Refresh All. To refresh individual services, click the appropriate button.

Symposium Call Center Server services

All of the Symposium Call Center Server functions are Windows NT services. Each service, as described in the following table, is started automatically by the Services manager when the server starts up. If networking is enabled, then the NDLOAM appears in the UP state. NCCOAM appears in the UP state only if your server is configured as an NCC.

Server service	Shown as	Purpose
Operations, Administration and Management	OAM	System operation, administration, and management
Auditing	AUDIT	Monitor function that manages all services
Network services (M1 only)	NDLOAM	Nodal system operation, administration, and management
Network services (M1 only)	NCCOAM	Network Control Center system operation, administration, and management
Telephony Service Manager	TSM	Telephony interface between switch and server
Voice Services Manager	VSM	Interface to Meridian Mail via ACCESS VOICE processing interface
Agent Skillset Manager	ASM	Agent and skillset handling
Meridian Link Services Manager	MLSM	Allows third-party applications to interface with Symposium Call Center Server
Task Flow Access	TFA	Allows third-party access via scripting commands (Data Exchange server)
Task Flow Executor	TFE	Executes all scripts and handles all calls
Statistical Data Manager Configuration	SDMCA	Manages all of the other statistical collection services
Historical Data Manager	HDM	Manages all of the historical data collected by HDC
Historical Data Collection	HDC	Collects all of the historical data
Real Time Data Collector	RDC	Collects and generates real-time statistics for displays
Statistical Data Propagator	SDP	Distributes incoming statistical data to the appropriate service
Intrinsic Services	IS	Manages skillset intrinsic data

Server service	Shown as	Purpose
Event Server	ES	Manages events

TFE does not come up after an upgrade or conversion

If the Task Flow Executor (TFE) does not appear in the UP state after an upgrade, then you must validate all scripts to correct the problem. For more information on validating scripts, refer to the *Symposium Call Center Server Scripting Guide* for your switch type.

TSM does not come up on my NCC server

This is normal. The Network Control Center, if present, performs only network administrative functions and does not perform any call processing. The telephony services manager (TSM), therefore, is not required. The only services that should be up are

- OAM
- AUDIT
- NCCOAM
- HDM

Other services do not come up

This problem can occur if you have more than one System Monitor Window open.

Troubleshooting other problems

Swap file usage exceeds 80%, or system is low on virtual memory

If the server has insufficient swap file space, a warning message appears, notifying you that it is low on virtual memory. You can also check swap file usage in the Performance Monitor. Swap file usage should not be consistently greater than 80%.

On a 1003t platform

If you have a 1003t platform, you can increase swap file space to 368 Mbytes. To do so, follow these steps:

- 1 Log on to Windows NT as Administrator.
- 2 In the Control Panel window, double-click System.
- 3 Click the Performance tab.
- 4 In the Virtual Memory section, click Change.
The Virtual Memory dialog box opens.
- 5 Select the drive containing your swap file.
- 6 If the swap file is located on drive D, ensure that the drive has at least 578 Mbytes of free disk space. (This ensures that at least 200 Mbytes of free disk space remains after you increase the swap file size.) If it does, continue with the following step.

If drive D does not contain 578 Mbytes of free space, select a different drive. Continue selecting drives until you find one with at least 378 Mbytes of free disk space. If you find a suitable drive, continue with the next step. (If you cannot find a drive with enough space, contact Nortel Networks Customer Support.)
- 7 Under Paging File Size for Selected Drive, enter 368 for Initial Size, and 368 for Maximum Size.
- 8 Click Set, and then click OK.
Result: You return to the System Properties property sheet.
- 9 Click OK.
- 10 Click Yes when prompted to restart the PC.

On any other platform

If you have another platform, contact your Nortel Networks Customer Service representative.

Other documents

Introduction

For additional information related to Symposium Call Center Server, refer to “Related documents” on page 4.

For Windows information, refer to the following table:

Document name	Document number	Purpose
Windows 95 Documentation Set	Produced by and available from your local Microsoft distributor	• Windows 95 operating system troubleshooting
Windows 98 Documentation Set	Produced by and available from your local Microsoft distributor	• Windows 98 operating system troubleshooting
Windows NT Server Documentation Set	Produced by and available from your local Microsoft distributor	• Windows NT operating system troubleshooting

Appendix B

Migrating to another platform

In this section

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Platform migration procedure	327

Migration procedure overview

Introduction

Platform or server migration is a process whereby the data residing on a server's hard disk is copied onto a second server. The primary reasons to perform a platform migration are

- in the event of a hardware failure
- to change to a different server with increased capacity

This process allows you to remove a server from the network and immediately replace it with another server.

If you want to perform a server conversion from Release 1.x to Release 3.0 and perform a platform migration, you must perform the conversion and migration separately.

Example

- If you want to migrate from, for example, a 2-Gbyte first physical drive server to a 4-Gbyte first drive server, perform the conversion on the original server first and then migrate to the new server. This ensures that there is more free disk space on the new server. In this case, the swap file on the new server remains on drive D.
- If you want to migrate from, for example, a 4-Gbyte first physical drive server to another 4-Gbyte first drive server, perform the platform migration to the new server first, and then perform the conversion. Since the new server is usually faster, the conversion process finishes sooner on the new server. This is a key element since there is usually a limited amount of downtime available to complete this task. As part of the conversion process, the swap file is moved off of drive D.

Supported platforms

The platform migration procedure applies to the supported platforms running as Symposium Call Center Server Release 3 (M1, DMS/MSL), listed in the following table:

Original platform	New platform
1000t	1000t
1000t	701t
1000t	702t
1000t	1001t
1000t	1003t
701t	701t
701t	702t
701t	1001t
701t	1003t
702t	702t
702t	1003t
1001t	1001t
1001t	1003t
1003t	1003t

Note: For Symposium Call Center Servers Release 3 (Network Control Center servers), the platform migration procedure only applies to the last three supported platform pairs shown above.

Before you begin

To ensure that you have all the information you need to complete the Platform Migration procedures, do the following before you begin platform migration:

- Follow the steps in the Migration checklist.
- Follow the instructions in the “Preparing for migration” and “Collecting original server information” sections, and complete the worksheets in the “Worksheets for collecting original server information” section.

Check for Installation Addendum

When performing a platform migration, check the Installation Addendum on your regional Symposium Call Center Server technical web site. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic.

Migration checklist

The following major steps are required to perform the platform migration:

Description	✓
Prepare the materials for migration. See “Preparing for migration” on page 305.	
Use the migration utility to collect the original server’s setup record and database configuration to a Platform Recovery Disk. See “Collecting information from the Migration Utility” on page 308.	
Record the Windows NT version. See “Checking the Windows NT version” on page 313.	
Record the disk partition configuration. See “Checking the disk partition configuration” on page 312.	
Record the RAM size. See “Checking RAM size” on page 315.	

Description	✓
Record the location and size of the swap file. See “Checking the swap file location” on page 317.	
Record the Symposium Call Center Server software version. See “Checking the Symposium Call Center Server software version” on page 320.	
Record the PEP level applied. See “Checking the PEP level applied” on page 321.	
Configure the new server in exactly the same way as the original server. See “To configure the new server” on page 328.	
Keep the swap file of the new server on drive D and ensure that the size is 268 Mbytes before the Symposium Call Center Server software is installed. See “To configure the new server” on page 328.	
Prepare the new server using the Platform Recovery Disk. This places the original server’s setup record and database configuration on the new server. See “To install the Symposium Call Center Server software” on page 332.	
Install the same version of the Symposium Call Center Server software on the new server as on the original server. The configuration parameters must match on both servers. See “To install the Symposium Call Center Server software” on page 332.	
Update the new server to the same PEP level as the original server. PEPs are available on your regional Symposium Call Center Server PEP web site. (North American customers refer to the web site at www.nortel-sccs.com . European customers refer to the Symposium Call Center Server area on the web site at www21.nortelnetworks.com/TSC_EUROPE .) See “To install the Symposium Call Center Server software” on page 332.	
Perform a database backup on the original server. Keep the original server offline before the database backup and until all data has been successfully migrated to the new platform. See “Backing up the original platform database” on page 344.	

Description	✓
<p>Save the NBSysRecord table from the new server database to an NBSysRecord backup disk. See “To restore the original platform database to the new platform” on page 345.</p> <p>Note: The NBSysRecord table contains hardware-specific information for the new server and must be restored after the original server database is migrated to the new server.</p>	
<p>Restore the database backup from the original server to the new server. See “To restore the original platform database to the new platform” on page 345.</p>	
<p>Restore the NBSysRecord table from the NBSysRecord disk to the new server. See “To restore the original platform database to the new platform” on page 345.</p>	
<p>Verify the integrity of the database. See “To restore the original platform database to the new platform” on page 345.</p>	
<p>Complete the migration. See “To complete the migration” on page 351.</p>	

Preparing for migration

Introduction

You need to have the following materials available before starting the migration process:

- blank tapes or data cartridges
- two blank preformatted disks
- Symposium Call Center Server software
- The latest available PEP that includes the Platform Migration Support Utilities and Backup and Restore Utilities
- a tape drive and associated driver software. The tape drive installed on the new server must be compatible with the tape drive on the original server running Symposium Call Center Server.

Required materials

Blank tapes/data cartridges

During the platform migration, you need blank tapes to store the original server's database using the database backup procedure. The blank tape must be of the correct type for the tape drive on the original server, and the tape capacity must be large enough to contain the database backup.

Blank disks

You need two blank preformatted disks—one disk for the creation of a Platform Recovery Disk that contains the original server's setup record and database configuration, and a second disk for the preservation of the new server's NBSystemRecord table.

Symposium Call Center Server software

Platform migration requires that the new server be installed with the same version of the Symposium Call Center Server software as is installed on the original server. You need the following installation disks:

- Nortel Networks Symposium Call Center Server Release 3.0 Operating System CD Version 1.0, and three Windows NT 4.0 Setup start disks
- Nortel Networks Symposium Call Center Server Application CD
- Nortel Networks Symposium Call Center Server Supplementary CD (optional). If supplied with the installation, this CD contains product enhancement files.

Platform migration support utilities and backup and restore utilities

Ensure that the latest platform migration support utilities and backup and restore PEP levels are applied to both the original and new servers. PEPs are available on regional Symposium Call Center Server PEP web site. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www21.nortelnetworks.com/TSC_EUROPE.

Tape drive and associated drive software

If the new server is equipped with a tape drive that is incompatible with the original server, remove the new server's tape drive and install a compatible tape drive and driver software.

Note: The tape drive replacement is temporary and required for the migration procedure only. Save the new server's tape drive and its driver software disks for reinstallation into the new server.

Note: If you are borrowing the tape drive from the original server, you should replace the tape drive on the new server after the original server database has been backed up.

You might also need adapters to connect the tape drives. For information on replacing a tape drive, refer to the hardware guide for your server.

Collecting original server information

Overview

The new server must use the same base configuration information as the original server. This section shows you how to obtain the required information from the original server before starting the platform migration process.

You can divide the information gathering into eight parts:

1. Collecting information from the Migration Utility
2. Checking the disk partition configuration
3. Checking the Windows NT version
4. Checking the computer name
5. Checking the RAM size
6. Checking the swap file location and size
7. Checking the Symposium Call Center Server software version
8. Checking the PEP level applied

Before you begin

Do the following before you begin to collect information from the original server:

- Check the Installation Addendum for Migration on your regional Symposium Call Center Server technical web site.
- Ensure the latest available PEPs are applied to the original server. The PEPs include the Platform Migration Utilities and the Backup and Restore Utilities.

Collecting information from the Migration Utility

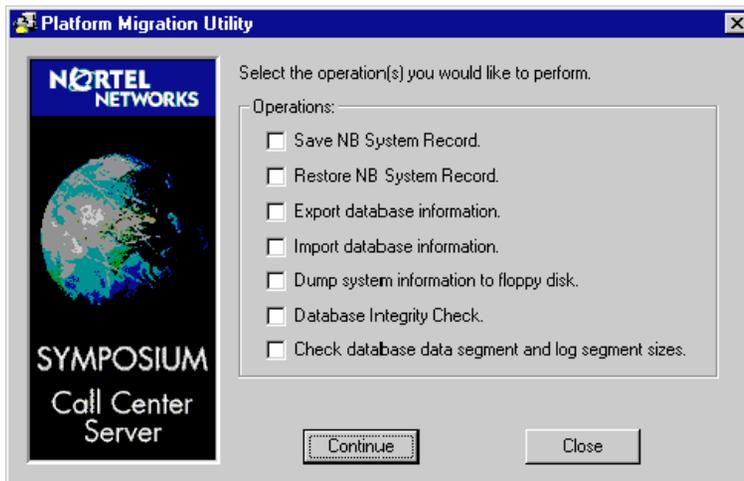
You can gather some of the required information using the Migration Utility as shown in this section. The information might also have been gathered during the installation of the original server, as shown in Chapter 2, “Worksheets and checklists.”

To collect information from the Migration Utility

To gather the original server’s setup record and database configuration to a disk, follow these steps.

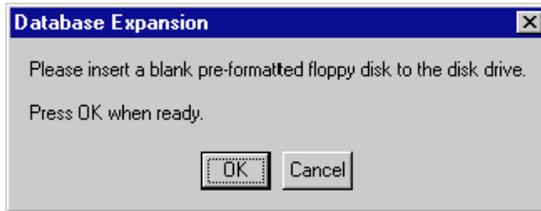
- 1 Log on to the original server as NGenSys.
- 2 From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

Result: The Platform Migration Utility dialog box appears.



- 3 Select the Export database information function. The Dump system information to floppy disk function is automatically selected. Click Continue.

Result: The following dialog box appears:



- 4 Insert a blank preformatted disk into drive A, and then click OK.

Result: Files containing the original server's setup record and database configuration are exported to the disk. The following dialog box appears:



- 5 Click OK.

Result: The following dialog box appears:



- 6 Click OK.

Result: The following dialog box appears:



- 7 Remove the disk from drive A, label it "Platform Recovery Disk," and click OK to exit the migration utility.
- 8 Keep the Platform Recovery Disk in a safe place.

Platform Recovery Disk

The Platform Recovery Disk contains the file MigInfo.txt, which includes the following information about the original server:

M1 Symposium Call Center Server

- keycode
- M1 serial number
- installed computer name
- current computer name
- site name
- M1 Switch name
- M1 Switch IP address
- M1 Switch customer group number
- M1 Switch type
- Server ELAN IP address
- Server CLAN IP address
- Server TCP/IP hostname
- Server TCP/IP protocol setup (that is, gateway, subnet mask, and so on)
- Voice Connectivity

DMS/MSL Symposium Call Center Server

- keycode
- Nortel Networks software feature key serial number
- installed computer name
- current computer name
- site name
- DMS/MSL Switch name
- DMS/MSL Switch IP address
- DMS/MSL Network Node
- DMS/MSL Application ID
- DMS/MSL Service ID
- DMS/MSL Service Version
- DMS/MSL Business Group
- DMS/MSL Linkset Name
- DMS/MSL Password
- Server ELAN IP address
- Server CLAN IP address
- Server TCP/IP hostname
- Server TCP/IP protocol setup (that is, gateway, subnet mask, and so on)
- Voice Connectivity

NCC Symposium Call Center Server

- keycode
- M1 serial number
- installed computer name
- current computer name
- site name
- Server ELAN IP address
- Server CLAN IP address
- Server TCP/IP hostname
- Server TCP/IP protocol setup (that is, gateway, subnet mask, and so on)

Note: The Platform Recovery Disk contains important information for system recovery and platform migration if needed in the future.

Checking the disk partition configuration

The new server must have the same or greater number of logical disk drive partitions as the original server. If the original server has four logical disk drive partitions (for example C, D, F, and G), then the new server must have at least four or more disk drive partitions, C, D, F, G, and optionally, H and I.

The logical disk drive letter assignment of all partitioned disks on the new server must match those on the original server. Any additional partitioned disk drive on the new server must be assigned to the next higher logical drive letter. For example, if the original server has C, D, F, and G assigned to the four partitioned drives, then the new server must also have C, D, F, and G assigned to the first four partitioned drives. You should also assign H and I to additional disk partitions on the new server if needed.

ATTENTION

By default, a new server is preinstalled with drive E as the CD-ROM drive. However, in some cases, the original server might have a drive letter other than E assigned to the CD-ROM drive. For example, if the original server has C, D, E, and F drive letters assigned to the first four partitioned drives, and G assigned as the CD-ROM drive, then the new server must also have C, D, E, and F drive letters assigned to the first four partitioned drives, and G assigned as the CD-ROM drive. If needed, the drive letter assignment can be changed on the new server to match the assignment on the original server. See “Changing the drive letter assignment on the new server” on page 329.

Each disk partition size on the new server must be as large as or larger than the corresponding drive on the original server.

To check the disk partition configuration on the original server

- 1 From the Windows Start menu, choose Programs → Administrative Tools → Disk Administrator.
- 2 Record the following on the “Disk partition configuration worksheet” on page 323:
 - the displayed disk number
 - the logical disk drive letter assignments
 - the size of each partitioned disk
- 3 Ensure that the new server has the same disk partition configuration as the original server.

The following presents an example only of disk partition configuration:

Disk number	Disk drive letter assignment	Disk partition size
Disk 0	C	102 Mbytes FAT
Disk 0	D	2047 Mbytes NTFS
CD-ROM 0	E	539 Mbytes CDFS
Disk 1	F	4095 Mbytes NTFS

Note: You must correct any noncompliant disk partition configuration on the new server, either by repartitioning the disk drive, reassigning drive letters, or replacing the server with a new platform that meets the requirements. See the *Nortel Networks Meridian Application Server Installation and Maintenance Guide* for your hardware platform.

Checking the Windows NT version

Before you install the new server with Symposium Call Center Server software, make sure the new platform is installed with the correct and same version of the Windows NT operating system as the original server. If needed, repartition all drives and reinstall the operating system again in the new server. See the *Nortel Networks Meridian Application Server Installation and Maintenance Guide* for your hardware platform.

To check the Windows NT version on the original server

- 1 Right-click the Windows Start menu and choose Explore.
- 2 On the Exploring window, click Help → About Windows NT.
Result: The About Windows NT window appears.
- 3 Record the Windows NT version and Service Pack version displayed on the “Windows NT version worksheet” on page 324.



Checking the computer name

By default, a new server is preinstalled with a dummy computer name. When you prepare the new server, you must change the dummy computer name to the correct computer name before installing Symposium Call Center Server.

Note: The computer name is case-sensitive. Ensure that the computer name used on the new platform is exactly the same as the name on the old platform.

Note: If the computer name on the original server was changed after the Symposium Call Center Server software was installed, use the originally Installed Computer Name of the original server to install the new server. Once the Symposium Call Center Server software is installed on the new server, change the new server computer name to match the Current Computer Name of the original server, and run the Computer Name Sync utility.

You can find the originally Installed Computer Name and the Current Computer Name from the MigInfo.txt file on the Platform Recovery Disk.

To check the computer name on the original server

- 1 On the original server, insert the Platform Recovery Disk into the floppy drive A.
- 2 From the Windows Start menu, choose Run.
- 3 Type **notepad A:\MigInfo.txt**, and then click OK to open the MigInfo.txt file.
- 4 Record the Installed Computer Name and Current Computer Name displayed on the “Computer name worksheet” on page 324.

Checking RAM size

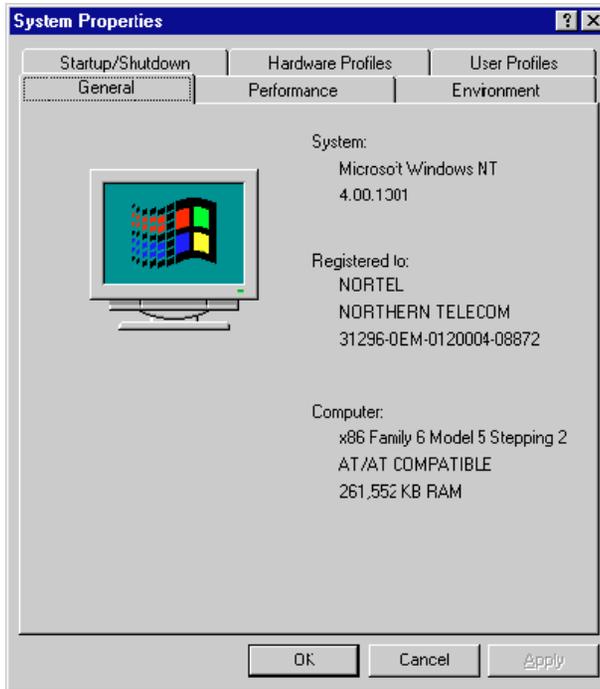
The total physical RAM of the new server should be the same as on the original server.

To check the RAM size on the original server

- 1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties window appears, with the General tab displayed.

- Record the RAM size displayed on the “RAM size worksheet” on page 324.



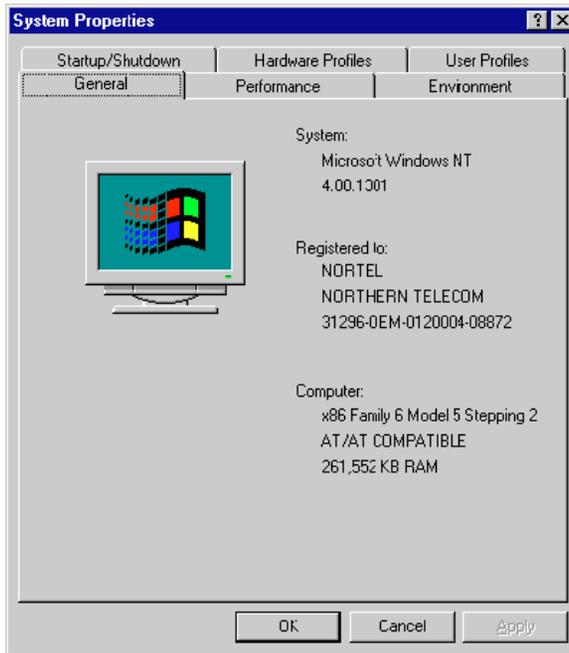
Checking the swap file location

The new server must have the same swap file location and size as the original server.

To check the swap file location and size on the original server

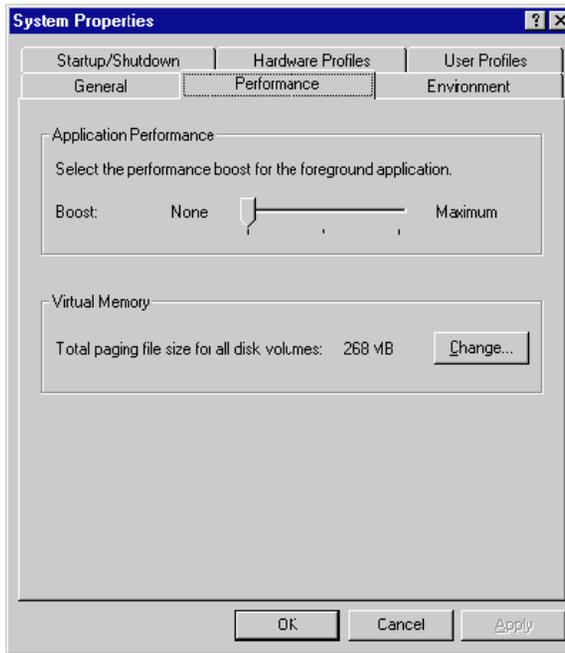
- 1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties window appears.



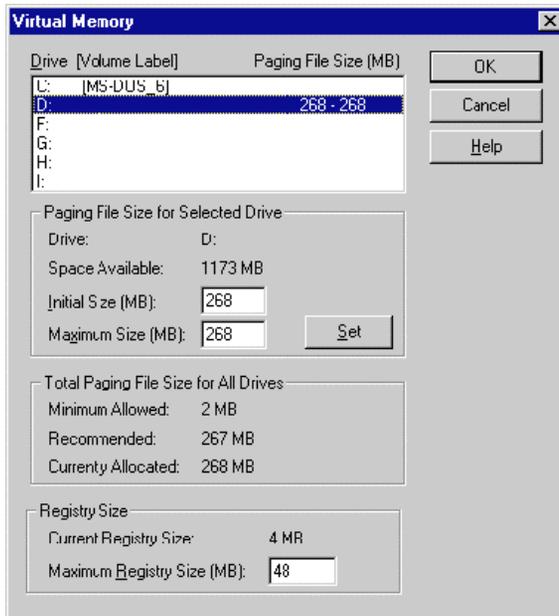
- 2 Click the Performance tab.

Result: The Performance tab appears.



- 3 Click the Change button in the Virtual Memory section.

Result: The Virtual Memory settings appear.



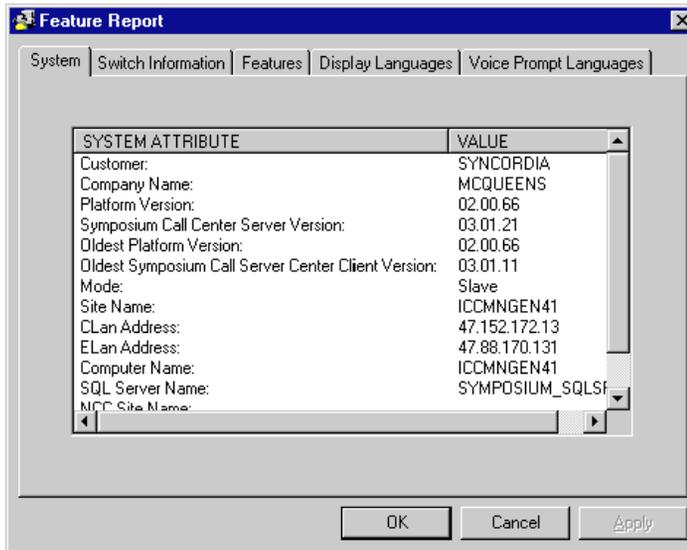
- 4 Record the disk location and size of the swap file or paging size (for example, drive D, 268 Mbytes) on the "Swap file location worksheet" on page 325.
- 5 Click Cancel to exit the Virtual Memory setting window.
- 6 Click Cancel to exit the System Properties window.
- 7 Exit the Control Panel.

Checking the Symposium Call Center Server software version

The new server must have the same software release version as the original platform.

To check the Symposium Call Center Server software version on the original server

- 1 On the original server, from the Windows Start menu, choose Programs → Symposium → Symposium Call Center Server → Features Report.
- 2 Choose the System tab.
- 3 Record the Platform Version and Symposium Call Center Server Version displayed on the “Symposium Call Center Server software version worksheet” on page 325.
- 4 Ensure that you obtain the correct version of software CDs for installation on the new server.



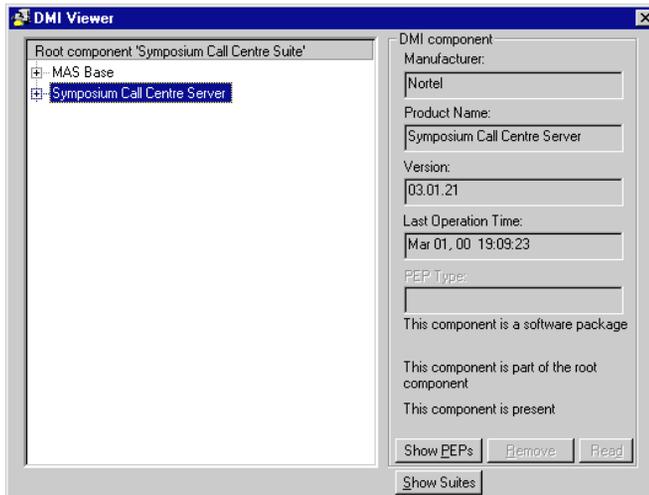
Checking the PEP level applied

The new server must be installed with the same PEP level for the corresponding release as the original server.

To check the PEP levels on the original server

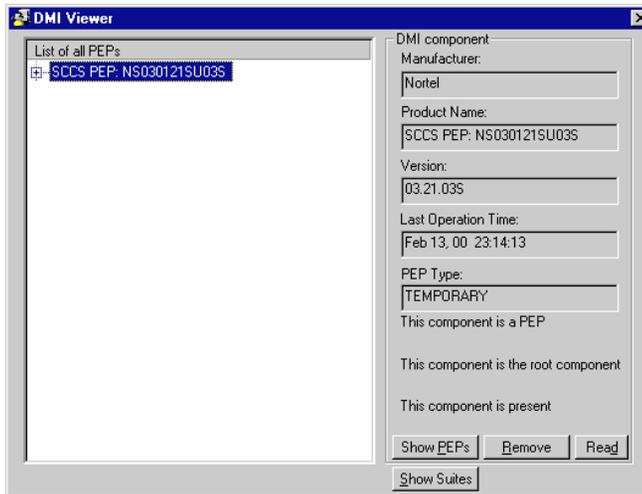
- 1 On the original server, from the Windows Start menu, choose Programs → Symposium → Symposium Call Center Server → DMI_View.

Result: The DMI Viewer appears.



- 2 Click the Show PEPs button.

Result: The List of all PEPs appears.



- 3 Click each displayed PEP on the list of PEPs. Record the PEP Product Name, PEP Version, and PEP Type in the DMI Component area for each PEP on the "PEP level worksheet" on page 325.

Worksheets for collecting original server information

Make photocopies of these worksheet pages and use them to record original server information for platform migration.

Disk partition configuration worksheet

For the migration procedure, you need the information specified in the following table:

Disk number	Disk drive letter assignment	Disk partition size

Windows NT version worksheet

For the migration procedure, you need the information specified in the following table:

Item	Fill in the required information
Windows NT version	
Service Pack version	

Computer name worksheet

For the migration procedure, you need the information specified in the following table:

Item	Fill in the required information
Installed Computer Name (that is, the Original Computer Name)	
Current Computer Name	

RAM size worksheet

For the migration procedure, you need the information specified in the following table:

Item	Fill in the required information
RAM size	

Swap file location worksheet

For the migration procedure, you need the information specified in the following table:

Item	Fill in the required information
Swap file logical disk location	
Swap file or paging size	

Symposium Call Center Server software version worksheet

For the migration procedure, you need the information specified in the following table:

Item	Fill in the required information
Platform Version	
Symposium Call Center Server Version	

PEP level worksheet

For the migration procedure, you need the information specified in the following table:

Item	Fill in the required information
PEP Product Name	
PEP Version	
PEP Type	
PEP Product Name	
PEP Version	
PEP Type	

Item	Fill in the required information
PEP Product Name	
PEP Version	
PEP Type	
PEP Product Name	
PEP Version	
PEP Type	

Platform migration procedure

Overview

This platform migration procedure applies to all supported migration paths. The procedure enables the original server to continue functioning until the new server is ready to be put into service.

You can divide the platform migration procedure into six parts:

1. Configuring the new server
2. Installing the Symposium Call Center Server software
3. Adjusting the swap file, if necessary
4. Backing up the old platform database
5. Restoring the old platform database to the new platform
6. Completing the migration

If the call center continues to respond to calls using Symposium Call Center Server after the database backup, then some call pegging data will be missing between the database backup of the original server and the restored database of the new server. If you must transfer pegging data to the new server, Nortel Networks recommends that

- the original server be taken out of service before the database backup and remain out of service during the entire migration procedure
- the customer collects all of the needed call statistic and pegging data from the original server's database before the server is taken out of service

To configure the new server

- 1 If the new platform is equipped with a tape drive that is incompatible with the tape drive on the original server, then remove the tape drive and install a compatible drive and its driver software on the new platform. See the *Nortel Networks Meridian Application Server Installation and Maintenance Guide* for your hardware platform.

Note: If you are moving the original tape drive to the new platform, ensure that the database backup of the original platform is complete before you remove the drive. See “Backing up the original platform database” on page 344.

- 2 Ensure that the new platform is disconnected from the network of the original platform (both ELAN and CLAN). The new platform should remain disconnected from the network until the migration procedure is completed.
- 3 Ensure that the new platform is installed with the correct version of operating system (NT 4.0 with service pack 3), and all disks are installed and partitioned as on the original server. If the operating system needs to be reinstalled, use the same computer name of the original platform to install the operating system.
- 4 Ensure that the computer name on the new server is the same as the first part of the SQL server name on the original server. See “Checking the computer name” on page 314. If you need to change the computer name of the new server, see Chapter 3, “Configuring Windows NT 4.0 server.”

Note: By default, a new server is preinstalled with a dummy computer name. When you prepare the new server, you must change the dummy computer name to the correct computer name before installing Symposium Call Center Server.

Note: The computer name is case-sensitive. Ensure that the computer name used on the new platform is exactly the same as the name used on the old platform.

Note: If the computer name on the original server was changed after the Symposium Call Center Server software was installed, use the originally Installed Computer Name of the original server to install the new server. Once the Symposium Call Center Server software is installed on the new server, change the new server computer name to match the Current Computer Name of the original server, and run the Computer Name Sync utility.

You can find the originally Installed Computer Name and the Current Computer Name from the MigInfo.txt file on the Platform Recovery Disk.

- 5 Ensure that the LAN network cards are set up with the same network IP configuration (for example, IP address, subnet mask, default gateway, and so on). Compare to the TCP/IP parameter information in the MigInfo.txt file of the Platform Recovery Disk.

Note: It is important that the new platform be disconnected from the network of the original platform (both ELAN and CLAN) before making the IP configuration platform change; otherwise, a duplicate IP error can occur and stop the original platform from normal operation.

- 6 Check and verify that the new server's disk configuration matches the original server. (See "Checking the disk partition configuration" on page 312.) To reassign drive letters on the new server, see "Changing the drive letter assignment on the new server" below.
- 7 Make sure the Virtual Memory allocation (swap file) on the new server is set to drive D and 268 Mbytes.
- 8 Restart the new server to activate all the changes (computer name, network IP configuration, and so on).

Note: It is normal for the Windows NT operating system to disable the network card if it is disconnected from the network. Ignore this warning and continue with the migration procedure.

Changing the drive letter assignment on the new server

Use this procedure if the drive letter assignment on the new server does not match that of the original server.

To check the drive letter assignment

- 1 On the new server, from the Windows Start menu, choose Programs → Administrative Tools → Disk Administrator.
- 2 If the disk administrator has never been run before, it needs to update the system configuration. Click OK to let it do so.
- 3 For any new disks in the system, the Disk Administrator warns you that there is no signature on the disk. Click OK to allow the signature to be written to disk. You must repeat this step for each new disk in the system.
- 4 Check whether the hard drives on the new server have the same drive letter assignments that match the original server.

- 5 If the drive letter assignments match, exit the Disk Administrator by selecting Partition → Exit from the Disk Administrator window.
- 6 If the drive letter assignments do *not* match, use the following steps to reassign the drive letters on the new server to the drive letter assignments of the original server.

To change the drive letter assignment

Note: Disk Administrator will not let you reassign a hard drive to a drive letter that is currently in use by another drive. You must first assign each hard drive to a temporary drive letter and restart the server before the drive letters can be reset to the correct order.

- 1 Assign the CD-ROM drive to the last available drive letter as follows:
 - a. From the Disk Administrator window, select Tools → Assign CD-ROM Drive Letters.
 - b. In the CD-ROM Drive Letters dialog box, change the drive letter to the last available letter, and then click Change.
 - c. In the confirmation window, confirm that the drive letter should be changed immediately by clicking Yes.
- 2 For each hard drive partition (excluding the C partition), change the drive letter to the last available drive letter:
 - a. Starting with the second partition on drive 0, click the partition to select it.
 - b. From the Disk Administrator window, select Tools → Drive Letter.
 - c. In the Assign Drive Letter dialog box, change the drive letter to the last available drive letter, and then click OK.
 - d. The Disk Administrator warns you that the drive cannot be locked for exclusive use (so the drive letter cannot be changed immediately). Click OK to continue.
 - e. In the confirmation dialog box, click Yes to change the drive letter when the system is next restarted.
 - f. Repeat step 2 for each remaining hard drive partition in the system.

Note: When you change the drive letters on the remaining partitions, you are informed that the drive letters can be changed immediately (click Yes to do so). This is because the partitions are not the primary partition (the one with the operating system installed on it).

- 3 From the Disk Administrator window, select Partition → Commit Changes Now to save the drive letter assignment.

Result: A message appears warning you that you should update the emergency repair disk.

- 4 Click OK to continue.
 - 5 The system alerts you that the server must now be restarted to allow the drive letters to be changed. Click OK to shut down and restart the server.
 - 6 After the server restarts, log on to the server as the Administrator.
 - 7 After you log on, a message appears in the System dialog box. Click Cancel to exit.
 - 8 Assign the CD-ROM drive to the correct drive letter:
 - a. From the Disk Administrator window, select Tools → Assign CD-ROM Drive Letters.
 - b. In the CD-ROM Drive Letters dialog box, change the drive letter to the correct letter, and then click Change.
 - c. In the confirmation window, confirm that the drive letter should be changed immediately by clicking Yes.
 - 9 For each hard drive partition (excluding the C partition), change the drive letter to the correct drive letter:
 - a. Starting with the extended partition on drive 0, click the partition to select it.
 - b. From the Disk Administrator window, select Tools → Drive Letter.
 - c. In the Assign Drive Letter dialog box, change the drive letter to the correct drive letter, and then click OK.
 - d. The Disk Administrator warns you that the drive cannot be locked for exclusive use (so the drive letter cannot be changed immediately). Click OK to continue.
 - e. In the confirmation dialog box, click Yes to change the drive letter when the system is next restarted.
 - f. Repeat step 8 for each remaining hard drive partition in the system.
- Note:** When you change the drive letters on the remaining partitions, you are informed that the drive letters can be changed immediately (click Yes to do so). This is because the partitions are not the primary partition (the one with the operating system installed on it).

- 10 From the Disk Administrator window, select Partition → Commit Changes Now to save the drive letter assignment.

Result: A message appears warning you that you should update the emergency repair disk. Click OK to continue.

- 11 The system alerts you that the server must now be restarted to allow the drive letters to be changed. Click OK to shut down and restart the server.

- 12 After the server restarts, log on to the server as the Administrator.

- 13 Ensure the new server has the same logical disk drive letter assignment as the original server.

To install the Symposium Call Center Server software

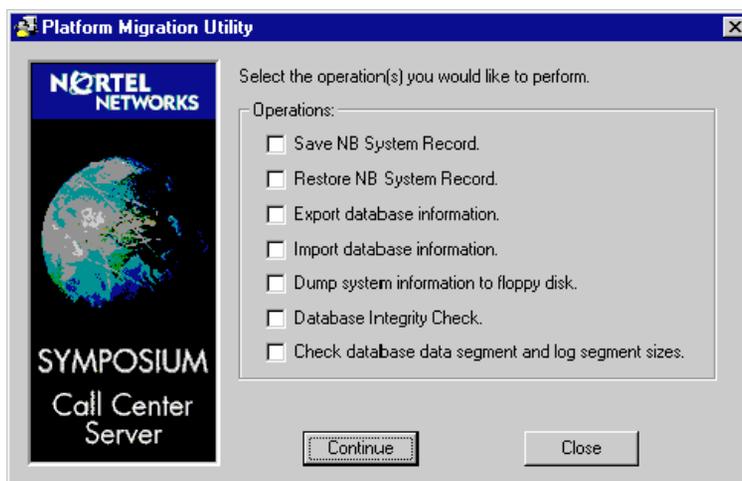
You must install the new server with the same Symposium Call Center Server software version and the same PEP level as the original server.

- 1 Log on to the new server as the administrator.
- 2 Insert the Platform Recovery Disk from the original server into drive A of the new server.
- 3 Open a command prompt and type the following commands:

A: <Enter>

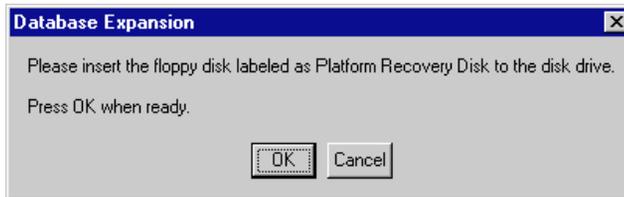
sysrecres.exe <Enter>

Result: The Platform Migration Utility window appears.



- 4 Select Import database information from the selection dialog box. Click Continue.

Result: The following dialog box appears:



- 5 Make sure the Platform Recovery Disk is in drive A, and then click OK to continue.

Result: The database information is imported to the new server.

ATTENTION

If you see the message Please eject the floppy disk from the drives and start the Symposium Call Center Server installation, click OK and then proceed with steps 6 through 14.

If you see the message This platform cannot support platform migration. There is not enough disk space, click OK, proceed with steps 6 and 7, and then follow the procedure "To adjust the swap file" on page 336. You will be asked to perform steps 8 through 14 after you complete the procedure "To adjust the swap file" on page 336.

- 6 Remove the disk from drive A and click OK.

Result: The sysrecres.exe utility is terminated.

Note: It is important that the original platform database configuration be imported before the Symposium Call Center Server software is installed on the new platform. Otherwise, the migration can result in a database restoration error.

- 7 Close the command prompt window.

ATTENTION

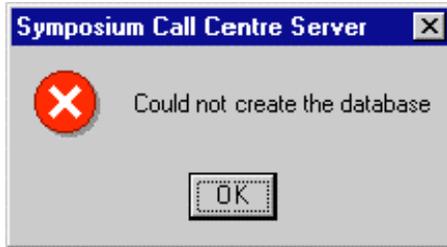
If you saw the message in step 5 `This platform cannot support platform migration. There is not enough disk space`, follow the procedure “To adjust the swap file” on page 336 now. You will be asked to perform steps 8 through 14 after you complete the procedure “To adjust the swap file” on page 336.

- 8 Install the Symposium Call Center Server software. You must use the same setup data you collected from the original server. See the MigInfo.txt file on the Platform Recovery disk for server details. For details about installing Symposium Call Center Server, see Chapter 5, “Installing the server software.”

ATTENTION

During the third phase of the installation (that is, after all the Symposium Call Center Server-specific information has been entered),

- if you see the message `The database will take between 1 to 3 hours to create...`, then the platform migration is proceeding and should complete successfully. At this point, to save time, you can perform the database backup on the original server. See “Backing up the original platform database” on page 344.
- if you see the message `This platform cannot support platform migration. There is not enough disk space. click OK`. If the following two error messages appear, click OK to abort the migration procedure. Then, check whether the swap file on drive D is reduced to 32 Mbytes. If it is not reduced to 32 Mbytes, go to the procedure “To adjust the swap file” on page 336 now. If it is reduced to 32 Mbytes already, contact your Nortel Networks Customer Support representative.

**Notes:**

- It is very important that you install the new server with the same Symposium Call Center Server software version as the original server.
 - It is not necessary to configure the new server in Configuration Mode during installation of the Symposium Call Center Server software.
 - If the server is a DMS/MSL server type, the Symposium Call Center Server installation does not need the Nortel Networks software feature key adapter (dongle) to be connected to the LPT1 parallel port of the new server during the migration procedures.
- 9 After installation of the Symposium Call Center Server software, restart the new server.
 - 10 Log on to the new server using the NGenSys account.
 - 11 If the swap file was reduced to 32 Mbytes during step 5 or 8 and the swap file should remain on drive D (since it was on drive D on the original server), follow the procedure “To move the swap file from drive D for Windows NT 4.0” on page 341. This moves the swap file to the next available drive, as drive D would not have sufficient free drive space if the swap file was extended to the required 268 Mbytes.
 - 12 If the swap file on the original server was on a drive other than D and the new server has the same size drive D partition as the original server, follow the procedure “To move the swap file from drive D for Windows NT 4.0” on

page 341. This moves the swap file to the same drive as the original server. To determine the swap file location, see “Checking the swap file location” on page 317. If the new server has a larger size D partition than the original server, do not move the swap file from the drive D.

- 13 Apply the same Performance Enhancement Packages (PEP) level to the new server as in the original server.

Note: It is very important that the new server be installed with the platform migration support PEP and the minimum backup and restore PEP level for the corresponding version. PEPs are available on your regional Symposium Call Center Server PEP web site.

- 14 With the Symposium Call Center Server software successfully installed, follow these procedures: “To back up the database of the original server,” “To restore the original platform database to the new platform,” and “To complete the migration.”

To adjust the swap file

If the physical disk space on drive D cannot accommodate the old database size, an error message appears stating `This platform cannot support platform migration. There is not enough disk space.`

- If this message appears when the database information is being imported to the new server (steps 1 through 5 in “To install the Symposium Call Center Server software” section), skip the first nine steps and perform steps 10 and 11 as follows.
 - If this message is seen when installing the Symposium Call Center Server software (step 8 in the “To install the Symposium Call Center Server software” section), proceed with steps 1 through 11 as follows.
- 1 Click OK to abort the migration procedure.
 - 2 Check the log file `D:\Nortel\iccm\dbinst\sysmig.txt` to determine how much more space is required.
 - 3 If the log file indicates that the required disk space is greater than 268 Mbytes, then the new server does not have sufficient disk space on drive D. For assistance, contact your Nortel Networks Customer Support representative.
 - 4 If the required disk space is less than 268 Mbytes, clean the Symposium Call Center Server installation by running `uninstall`. From the Windows Start menu, choose `Programs → Symposium Call Center Server → Uninstall`.

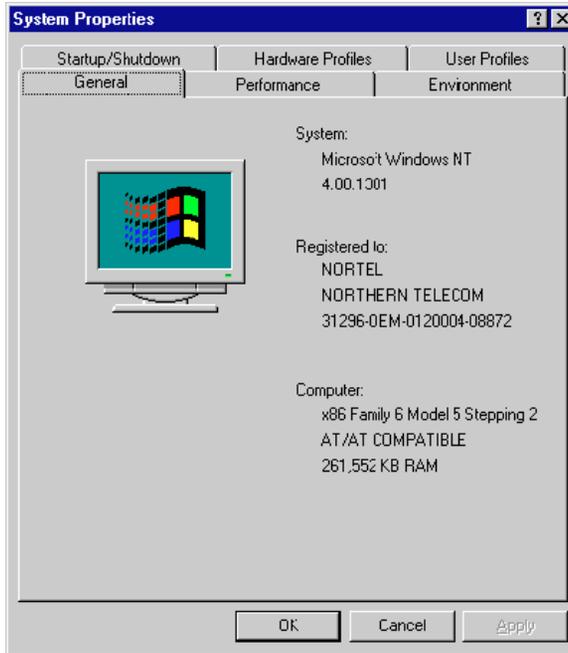
- 5 Click Select All to uninstall all the components for both MAS and Symposium Call Center Server.
- 6 Follow the on-screen instructions to complete the uninstall process. See the procedure "To uninstall server software" in Chapter 5, "Installing the server software."
- 7 When prompted to restart the system, click No.
- 8 Run uninstall one more time. From the Windows Start menu, choose Programs → Symposium Call Center Server to remove DMI. Follow the on-screen instructions.
- 9 When prompted to restart the system, click OK.
- 10 Once the system has restarted, reduce the swap file size on drive D, setting both minimum and maximum values to 32 Mbytes using the procedure "To reduce the swap file size on drive D" on page 338.
- 11 Perform steps 8 through 14 in the procedure "To install the Symposium Call Center Server software" on page 332 to install Symposium Call Center Server software. If you do not see the message `The database will take between 1 to 3 hours to create...`, contact your Nortel Networks Customer Support representative.

To reduce the swap file size on drive D

Use this procedure only if instructed from the procedure “To adjust the swap file” on page 336.

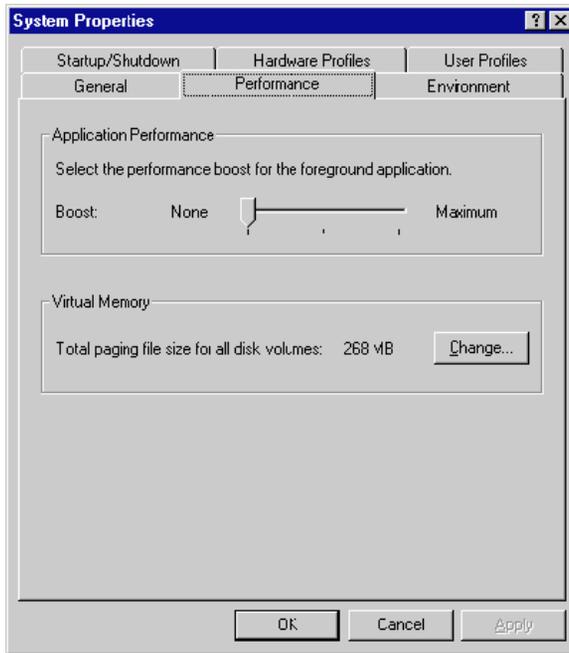
- 1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties window appears.



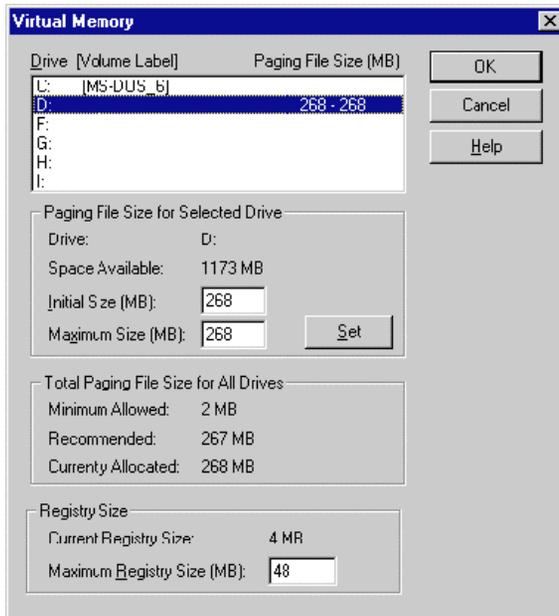
- 2 Click the Performance tab.

Result: The Performance tab appears.



- 3 Click the Change button in the Virtual Memory section.

Result: The Virtual Memory settings appear.



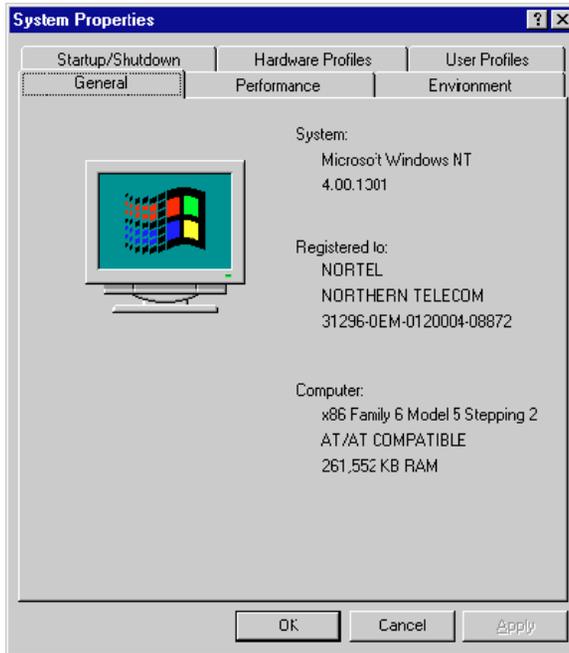
- 4 Highlight drive D.
- 5 Type **32** for both Initial Size (MB) and Maximum Size (MB).
- 6 Click Set and accept any warnings presented.
- 7 Click OK.
- 8 Restart the server when prompted.

To move the swap file from drive D for Windows NT 4.0

Use this procedure only if instructed from the procedure “To adjust the swap file” on page 336, or “To install the Symposium Call Center Server software” on page 332.

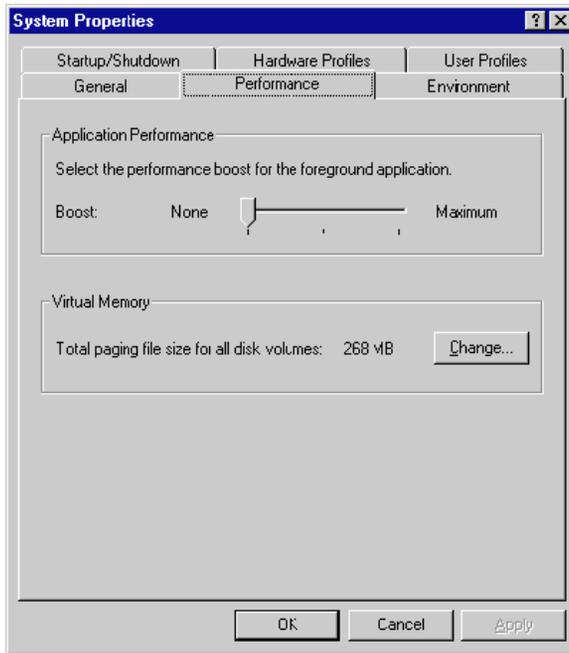
- 1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties window appears.



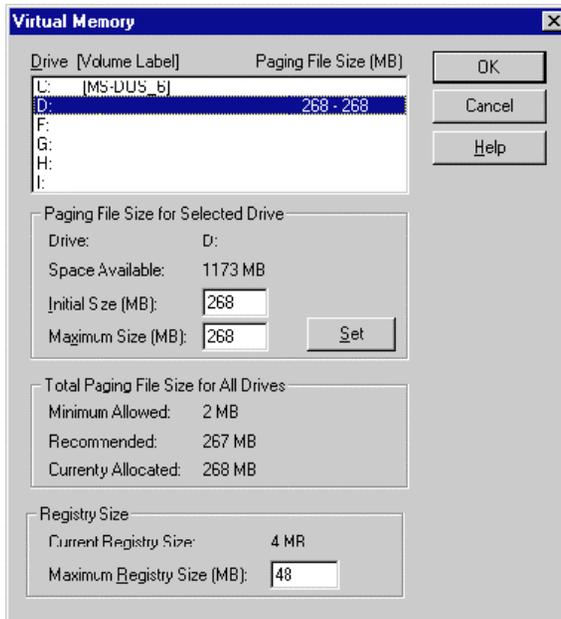
- 2 Click the Performance tab.

Result: The Performance tab appears.



- Click Change in the Virtual Memory section.

Result: The Virtual Memory settings appear.



- Highlight drive F, or the first drive letter that appears after drive D.
- Ensure that there are at least 288 Mbytes of available space.
- If there is not enough available space, select the next available drive and repeat steps 4 and 5. If you check all drives and none have 288 Mbytes of available space, contact your Nortel Networks customer support representative for assistance.
- Highlight drive D to display the existing swap file Initial Size (MB) and Maximum Size (MB).
- Click Close on the Symposium Properties window.
- Click Yes to restart the server when prompted.
- Click Set and accept any warnings presented.
- Select the drive identified in steps 4 through 6.
- Type **268** for both Initial Size (MB) and Maximum Size (MB), and click Set.
- Click OK to apply the changes.

- 14 Click CLOSE in the System Properties window.

Result: The system indicates that a restart is required.

- 15 Click Yes to restart the system now.

Backing up the original platform database

The migration process involves backing up the entire database of the original server. You can perform this process in parallel with the steps of configuring the new server and installing the Symposium Call Center Server software, or ahead of time.

Note: The migration process allows the original server to remain online and in active service while the database is backed up and restored to the new server. This causes some call statistics and data pegging to be missing from the backup tape.

ATTENTION

If it is important that all call statistic and data pegging be migrated to the new server, take the original server offline before the database backup, and ensure that it remains offline until all data has been successfully migrated to the new server. You must collect all call statistics and data pegging before the original server is removed from service.

Note: Although the database backup is an online process, it adds an additional load to the server and reduces overall call center performance. Nortel Networks recommends that you perform this procedure during non-peak traffic hours. Do not change any call center configuration or user setup information during the database backup operation.

To back up the database of the original server

- 1 Insert a blank tape into the original platform tape drive.
- 2 Log on to the original platform as a Symposium Call Center Server administrator from a client PC.
- 3 Schedule a partial database backup (database only) on the original platform. Refer to the *Nortel Networks Symposium Call Center Server Administrator's Guide* for your switch.

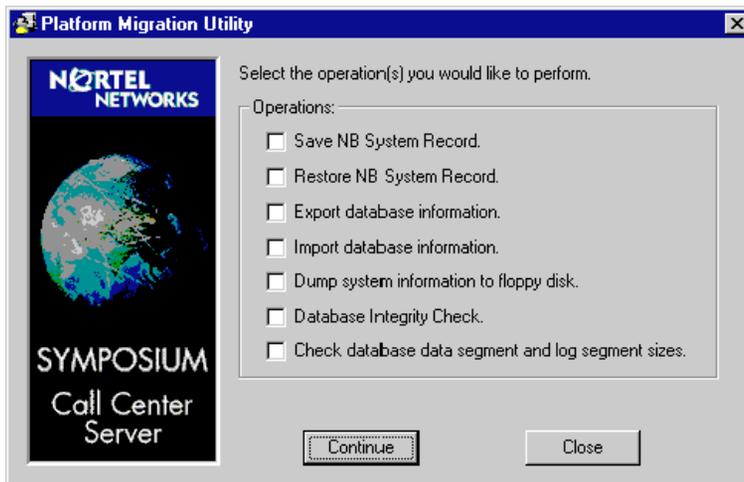
- 4 Once the database backup is complete on the original platform, remove the backup tape. Save this backup tape for the restore of the original platform database on the new server.

To restore the original platform database to the new platform

The final part of the migration procedure involves restoring the original server database backup to the newly installed server. The new server must have been installed with the same Symposium Call Center Server software version as the original server. The new server does not need to be connected to the network or the M1 or DMS switch.

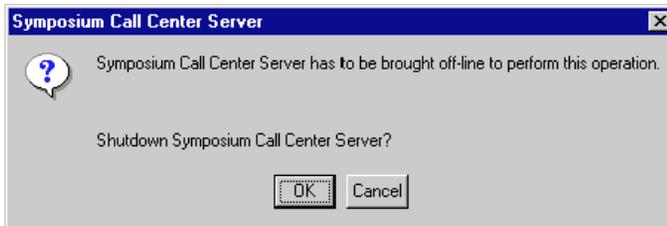
- 1 On the new platform, from the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

Result: The Platform Migration Utility dialog box appears.



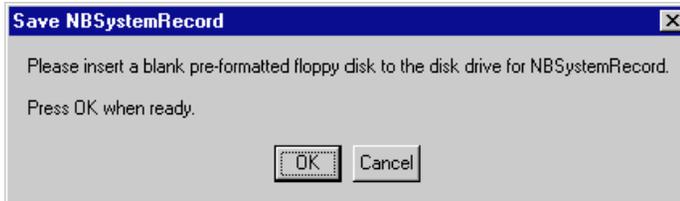
- 2 Choose the Save NB System Record option. Click Continue.

Result: The following dialog box appears:



- 3 Click OK to shut down the Symposium Call Center Server.

Result: When the Symposium Call Center Server shuts down, the following dialog box appears:



- 4 Insert a blank preformatted disk into the disk drive of the new platform. Click OK to continue after the disk is inserted.
- 5 Wait until the following dialog box appears:



- 6 Eject the disk and label the disk as instructed. Click OK to terminate the utility (the utility closes automatically after you click OK). Save the NBSystemRecord backup disk for step 17.
- 7 Insert the database backup tape from the original platform into the tape drive of the new platform.

Note: The new platform must have a tape drive and driver software compatible with the original platform. The new platform must be installed

with the minimal backup and restore PEP level before you can proceed to the next step. The computer name of the new server must be the same as that of the original server.

- 8 On the new server, from the Windows Start menu, choose Programs → Symposium Call Center Server → Database Restore to migrate the original platform database to the new platform.

Result: The Database Restore window appears.



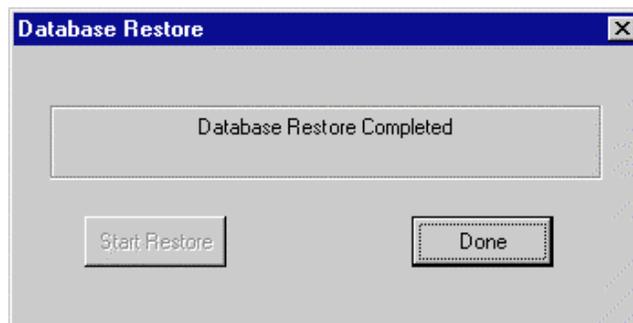
- 9 Click Start Restore to begin the database restore process.

Result: The message Please ensure the database backup tape is in the tape drive appears.

- 10 Click OK to continue.

Note: The database takes one to three hours to restore, depending on the amount of data.

- 11 Wait until the following dialog box appears. A log file is created with the following pathname after the database restore is completed:
D:\Nortel\data\backup\RestoreLogs\restore.log



- 12 Click Done.

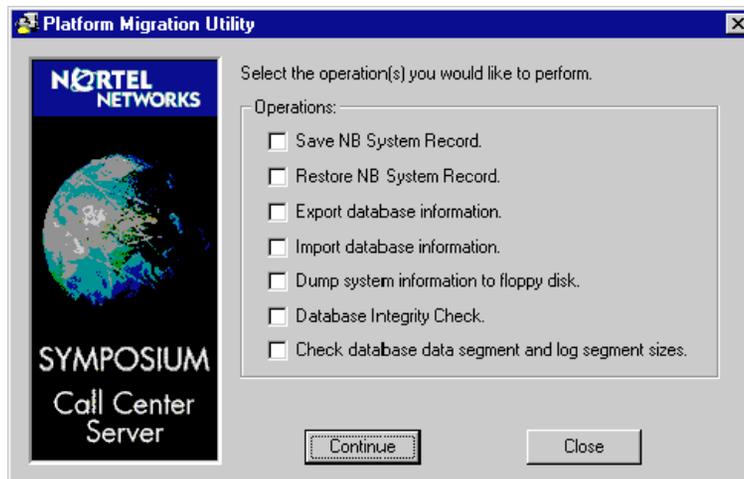
Result: The following dialog box appears:



- 13 Eject the backup tape from the tape drive, and then click OK to exit the Database Restore utility. *Do not* restart the server.

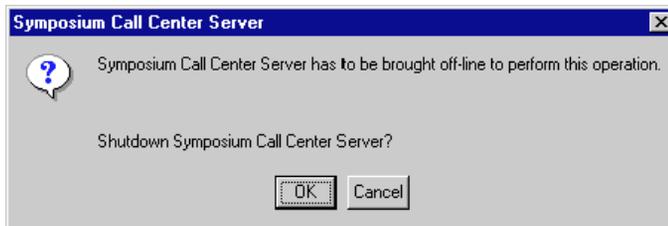
- 14 On the new platform, from the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

Result: The Platform Migration Utility dialog box appears.



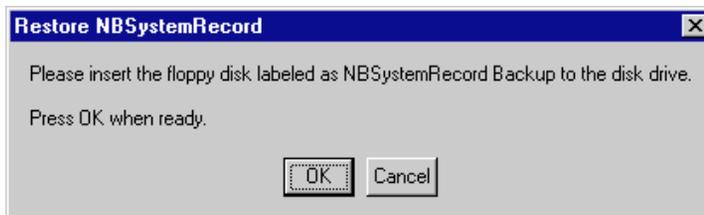
- 15 Select the Restore NB System Record option. Click Continue.

Result: The following dialog box appears:



- 16 Click OK to shut down the Symposium Call Center Server.

Result: When the Symposium Call Center Server shuts down, the following dialog box appears:



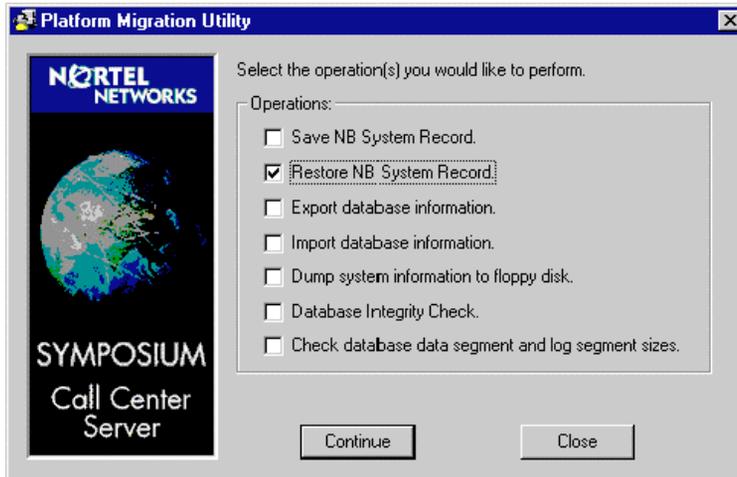
- 17 Insert the NBSysRecord Backup disk created in steps 4 through 6 into the drive, and click OK to continue.

Note: It takes some time for the database server to recover from the database restore and can take several minutes for the SQL database server to start up properly. The utility waits until the SQL server is completed before restoring the NBSysRecord table. Wait until the following dialog box appears:



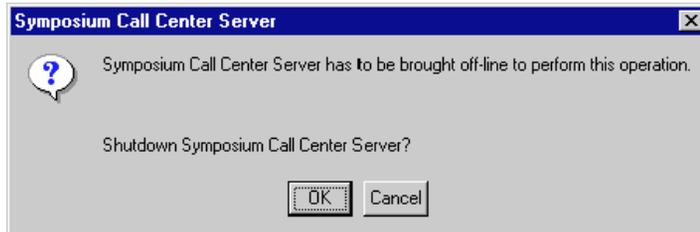
- 18 Eject the NBSysRecord Backup disk from the drive, and then click OK to continue.

Result: The selection dialog box appears.



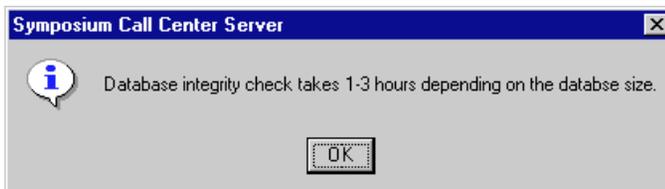
- 19 Select the Database Integrity Check option. Click Continue.

Result: The following dialog box appears:



- 20 Click OK.

Result: The following dialog box appears:



- 21 Click OK to start the database integrity check.

Note: The database integrity check takes a while to complete, and you might not see any activity on the screen, but you should notice continuous disk activity. Wait until the following dialog box appears:



- 22 Click OK to terminate the utility (the utility closes automatically when you click OK).

- 23 View the database check log (C:\DbChk.log) for any possible database error.

Note: Contact your Nortel Networks Customer Support representative for any detected database error. *Do not* put the new platform into service with any detected database error, even though the new platform might seem to be functioning normally. When checking the log file, search for key words such as ERROR or MSG.

- 24 If the restore operation is successful, continue with "To complete the migration" on page 351.

To complete the migration

- 1 If the tape drive on the new server is not the original tape drive, remove it and replace it with the original drive, including the proper driver software.
- 2 Shut down the call center operation and services on the original server. Disconnect the original server from the network.
- 3 If the server is a DMS/MSL server type, disconnect the Nortel Networks software feature key adapter (dongle) from the LPT1 parallel port of the original platform and move it to the new platform.
- 4 Connect the new server to the network. Restart the server to full service.
- 5 Verify the proper operation of the Symposium Call Center Server software on the new server.

- 6 Back up the new server's database. (See the *Nortel Networks Symposium Call Center Server Administrator's Guide*.)
- 7 Create a platform recovery disk for the new server. (See the *Nortel Networks Symposium Call Center Server Administrator's Guide*.)

Note: Nortel Networks recommends that you perform a full backup on the new server before putting the server into full service.

Glossary

A

accelerator key

A key on a phoneset that an agent can use to place a call quickly. When an agent presses an accelerator key, the system places the call to the configured number associated with the key. For example, if an agent presses the Emergency key, the system places a call to the agent's supervisor.

access class

A collection of access levels that defines the actions a member of the access class can perform within the system. For example, a member of the Administrator access class might be given a collection of Read/Write access levels.

access level

A level of access or permission given to a particular user for a particular application or function. For example, a user might be given View Only access to historical reports.

ACCESS link

A communication channel between the Symposium Call Center Server and Meridian Mail.

ACCESS voice port

A Meridian Mail voice port that is controlled by the ACCESS link.

ACD call

See Automatic call distribution call.

ACD-DN

See Automatic call distribution directory number.

ACD group

See Automatic call distribution group.

ACD routing table

See Automatic call distribution routing table.

ACD subgroup

See Automatic call distribution subgroup.

acquired resource

A resource configured on the switch that is under the control of the Symposium Call Center Server. Resources must be configured with matching values on both the switch and the Symposium Call Center Server.

activated script

A script that is processing calls or is ready to process calls. Before you can activate a script, you must first validate it.

activity code

A number that an agent enters on his or her phoneset during a call. Activity codes provide a way of tracking the time agents spend on various types of incoming calls. They are also known as Line of Business (LOB) codes. For example, the activity code 720 might be used to track sales calls. Agents can then enter 720 on their phonesets during sales calls, and this information can be generated in an Activity Code report.

administrator

A user who is responsible for maintaining the Symposium Call Center Server.

agent

A user who is responsible for handling customer calls.

agent login ID

A unique identification number assigned to a particular agent. The agent uses this number when logging in. The agent ID is not associated with any particular phoneset.

agent to skillset assignment

A matrix that, when you run it, sets the priority of one or more agents for a skillset. Agent to skillset assignments can be scheduled.

agent to supervisor assignment

A definition that, when you run it, assigns one or more agents to specific supervisors. Agent to supervisor assignments can be scheduled.

application

1. A logical entity that represents a Symposium Call Center Server script for reporting purposes. The master script and each primary script have an associated application. The application has the same name as the script it represents. 2. A program that runs on a computer.

application program interface

A set of routines, protocols, and tools that programmers use to develop software applications. APIs simplify the development process by providing commonly used programming procedures.

associated supervisor

A supervisor who is available for an agent if the agent's reporting supervisor is unavailable. *See also* reporting supervisor.

Automatic call distribution call

A call to an ACD-DN. ACD calls are distributed to agents in an ACD group based on the ACD routing table on the switch.

Automatic call distribution directory number

Primary and supplementary DN's associated with an ACD group. Calls made to these DN's are distributed to agents belonging to the group, based on the ACD routing table on the switch.

Automatic call distribution group

An entity defined on the switch for the purpose of call distribution. When a customer dials an ACD group, the call is routed to any agent who is a member of that group.

Automatic call distribution routing table

A table configured on the switch that contains a list of ACD-DN's used to define routes for incoming calls. This ensures that incoming calls not processed by Symposium Call Center Server will be queued to ACD groups and handled by available agents.

Automatic call distribution subgroup

An entity defined on the switch to assign supervisory responsibilities. Each subgroup has one supervisor phoneset and a number of agent phonesets associated with it. Agents can log on to any phoneset within their ACD subgroup. The supervisor must log on to the supervisor phoneset to monitor his or her assigned agents.

C**call age**

The amount of time a call was waiting in the system before being answered by an agent.

call destination

The site to which an outgoing network call is sent. *See also* call source.

call intrinsic

A script element that stores call-related information assigned when a call enters the Symposium Call Center Server. *See also* intrinsic, skillset intrinsic, time intrinsic, and traffic intrinsic.

call presentation class

A collection of preferences that determines how calls are presented to an agent. A call presentation class specifies whether a break time between calls is allowed, whether an agent can put DN calls on hold for incoming ACD calls, and whether an agent phoneset displays that the agent is reserved for a network call.

call priority

A numerical value assigned in a script that defines the relative importance of a call. If two calls are in the queue when an agent becomes available, and one call is queued with a higher priority than the other, the agent receives the higher priority call first. *See also* skillset priority.

call source

The site from which an incoming network call originates. *See also* call destination.

call treatment

A script element that enables you to provide handling to a call while it is waiting to be answered by a call center agent. For example, a caller can hear a recorded announcement or music while waiting for an agent.

call variable

A script variable that applies to a specific call. A call variable follows the call through the system and is passed from one script to another with the call. *See also* global variable, variable.

Calling Line Identification

This is an optional service that identifies the telephone number of the caller. This information can then be used to route the call to the appropriate agent or skillset. The CLID can also be displayed on an agent's phoneset.

CDN

See controlled directory number.

CLAN

See Customer local area network.

CLID

See Calling Line Identification.

client

The part of Symposium Call Center Server that runs on a personal computer or workstation and relies on the server to perform some operations. *See also* server.

command

A building block used with expressions, variables, and intrinsics to create scripts. Commands perform distinct functions, such as routing a call to a specific destination, playing music to a caller, or disconnecting a caller.

controlled directory number

A special directory number that allows calls arriving at the switch to be queued when the CDN is controlled by an application such as Symposium Call Center Server. When a call arrives at this number, the switch notifies the application and waits for routing instructions, which are performed by scripts in Symposium Call Center Server.

Customer local area network

The LAN to which your corporate services and resources connect. The Symposium Call Center Server and client both connect to the CLAN. Third-party applications that interface with the server also connect to this LAN.

D**DBMS**

Database Management System

deactivated script

A script that does not process any new calls. If a script is in use when it is deactivated, calls continue to be processed by the script until they are completed.

default activity code

The activity code that is assigned to a call if an agent does not enter an activity code manually, or when an agent presses the activity code button twice on his or her phoneset. Each skillset has a defined default activity code.

default skillset

The skillset to which calls are queued if they have not been queued to a skillset or a specific agent by the end of a script.

desktop user

A configured user who can log on to the Symposium Call Center Server from a client PC.

destination site

The site to which an outgoing network call is sent. *See also* source site.

DHCP

See dynamic host configuration protocol.

Dial-Up Networking

See Remote Access Services.

Dialed Number Identification Service

An optional service that allows Symposium Call Center Server to identify the phone number dialed by the incoming caller.

An agent can receive calls from customers calling in on different DNISs and, if the DNIS is displayed on the phoneset, can prepare a response according to the DNIS.

directory number

The number that identifies a phoneset on a switch. The directory number (DN) can be a local extension (local DN), a public network telephone number, or an automatic call distribution directory number (ACD-DN).

directory number call

A call that is presented to the DN key on an agent's phoneset.

display threshold

A threshold used in real-time displays to highlight a value below or above the normal range.

DMS

Digital Multiplex Switch.

DN

See directory number.

DN call

See directory number call.

DNIS

See Dialed Number Identification Service.

dongle

The attachment plugged into the parallel port of a server connected to a DMS/MSL-100 switch that authenticates the serial number required at the time of server installation.

dynamic host configuration protocol

A protocol for dynamically assigning IP addresses to devices on a network.

dynamic link library

A library of executable functions or data that can be used by a Windows application. Typically, a DLL provides one or more particular functions and a program accesses the functions by creating either a static or dynamic link to the DLL. A DLL can be used by several applications at the same time.

E**ELAN**

See embedded local area network.

embedded local area network

A dedicated Ethernet TCP/IP LAN that connects the Symposium Call Center Server and the switch.

Emergency key

A key on an agent's phoneset that, when pressed by an agent, automatically calls his or her supervisor to notify the supervisor of a problem with a caller.

event

1. An occurrence or action on the Symposium Call Center Server, such as the sending or receiving of a message, the opening or closing of an application, or the reporting of an error. Some events are for information only, while others can indicate a problem. Events are categorized by severity: information, minor, major, and critical. 2. An action generated by a script command, such as queuing a call to a skillset or playing music.

expression

A building block used in scripts to test for conditions, perform calculations, or compare values within scripts. *See also* logical expression, mathematical expression, and relational expression.

F**filter timer**

The length of time after the system unsuccessfully attempts to route calls to a destination site, before that site is filtered out of a routing table.

first-level threshold

The value that represents the lowest value of the normal range for a statistic in a threshold class. The system tracks how often the value for the statistic falls outside this value.

G**global settings**

Settings that apply to all skillsets or IVR ACD-DNs that are configured on your system.

global variable

A variable that contains values that can be used by any script on the system. The value of a global variable can only be changed in the Script Variable Properties sheet. It cannot be changed in a script. *See also* call variable, variable.

I**ICM**

See Intelligent Call Manager.

Incalls key

The key on an agent phoneset to which incoming ACD and Symposium Call Center Server calls are presented.

Intelligent Call Manager

A high capacity call center TCP/IP interface to the switch that enables the exchange of messages between the switch and a remote host computer.

Interactive voice response

An application that allows telephone callers to interact with a host computer using prerecorded messages and prompts.

Interactive voice response ACD-DN

A directory number that routes a caller to a specific IVR application. An IVR ACD-DN must be acquired for non-integrated IVR systems.

Interactive voice response event

A voice port login or logout. An IVR event is pegged in the database when a call acquires or de-acquires a voice port.

Internet Protocol address

An identifier for a computer or device on a TCP/IP network. Networks use the TCP/IP protocol to route messages based on the IP address of the destination. For customers using NSBR, site IP addresses must be unique and correct. The format of an IP address is a 32-bit numeric address written as four values separated by periods. Each value can be 0 to 255. For example, 1.160.10.240 could be an IP address.

intrinsic

A word or phrase used in a script to gain access to system information about skillsets, agents, time, and call traffic that can then be used in formulas and decision-making statements. *See also* call intrinsic, skillset intrinsic, time intrinsic, and traffic intrinsic.

IP address

See Internet Protocol address.

IVR

See Interactive voice response.

IVR ACD-DN

See Interactive voice response ACD-DN.

IVR event

See Interactive voice response event.

IVR port

See voice port.

L**LAN**

See Local area network.

Line of Business code

See activity code.

LOB code

See activity code.

Local area network

A computer network that spans a relatively small area. Most LANs connect workstations and personal computers and are confined to a single building or group of buildings.

local call

A call that originates at the local site. *See also* network call.

local skillset

A skillset that can be used at the local site only. *See also* network skillset, skillset.

logical expression

A symbol used in scripts to test for different conditions. Logical expressions are AND, OR, and NOT. *See also* expression, mathematical expression, and relational expression.

M**M1**

Meridian 1 switch

master script

The first script executed when a call arrives at the Symposium Call Center Server. A default master script is provided with Symposium Call Center Server, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* network script, primary script, script, and secondary script.

mathematical expression

An expression used in scripts to add, subtract, multiply, and divide values. Mathematical expressions are addition (+), subtraction (-), division (/), and multiplication (*). *See also* expression, logical expression, and relational expression.

Meridian Link Services

A communications facility that provides an interface between the switch and a third-party host application.

Meridian Mail

A Nortel Networks product that provides voice messaging and other voice and fax services.

Meridian MAX

A Nortel Networks product that provides call processing based on ACD routing.

MLS

See Meridian Link Services.

MM

See Meridian Mail.

music route

A resource installed on the switch that provides music to callers while they wait for an agent.

N**NACD call**

A call that arrives at the server from a network ACD-DN.

NCC

See Network Control Center.

network call

A call that originates at another site in the network. *See also* local call.

Network Control Center

The server on a Symposium Call Center Server system where NSBR is configured and where communication between servers is managed.

network script

The script that is executed to handle error conditions for Symposium Call Center Server calls forwarded from one site to another, for customers using NSBR. The network script is a system-defined script provided with Symposium Call Center Server, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* master script, primary script, script, and secondary script.

Network Skill-Based Routing

An optional feature with Symposium Call Center Server that provides skill-based routing to multiple networked sites.

network skillset

A skillset that is common to every site on the network. Network skillsets must be created at the Network Control Center (NCC).

night mode

A skillset state in which the server does not queue incoming calls to the skillset, and in which all queued calls are given night treatment. A skillset goes into night mode automatically when the last agent logs off, or the administrator can put it into night mode manually. *See also* out-of-service mode, transition mode.

NPA

See Number Plan Area.

NSBR

See Network Skill-Based Routing.

Number Plan Area

Area code

O**object linking and embedding**

A compound document standard that enables you to create objects with one application and then link or embed them in a second application.

ODBC

See Open Database Connectivity.

OEM

Original equipment manufacturer

OLE

See object linking and embedding.

Open Database Connectivity

A Microsoft-defined database application program interface (API) standard.

out-of-service mode

A skillset state in which the skillset does not take calls. A skillset is out of service if there are no agents logged on or if the supervisor puts the skillset into out-of-service mode manually. *See also* night mode, transition mode.

out-of-service skillset

A skillset that is not taking any new calls. While a skillset is out of service, incoming calls cannot be queued to the skillset. *See also* local skillset, network skillset, and skillset.

P**PBX**

See private branch exchange.

pegging

The action of incrementing statistical counters to track and report on system events.

pegging threshold

A threshold used to define a cut-off value for statistics such as short call and service level. Pegging thresholds are used in reports.

PEP

See Performance Enhancement Package.

Performance Enhancement Package

A Symposium Call Center Server supplementary software application that enhances the functionality of previously released software by improving performance, adding functionality, or correcting a problem discovered since the original release.

personal directory number

A DN on which an agent can be reached directly, usually for private calls.

phoneset

The physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

phoneset display

The display area on an agent's phoneset where information about incoming calls can be communicated.

Position ID

1. A unique identifier for a phoneset, used by the switch to route calls to the phoneset. 2. Referred to as Telephony/Port Address in Symposium Call Center Server.

primary ACD-DN

A directory number that callers can dial to reach an ACD group.

primary script

A script that is executed or referenced by the master script. A primary script can route calls to skillsets, or it can transfer routing control to a secondary script. *See also* master script, network script, script, and secondary script.

private branch exchange

A telephone switch, typically used by a business to service its internal telephone needs. A PBX usually offers more advanced features than are generally available on the public network.

R**RAN**

recorded announcement

RAN route

See recorded announcement route.

RAS

See Remote Access Services.

recorded announcement route

A resource installed on the switch that offers a recorded announcement to callers.

relational expression

An expression used in scripts to test for different conditions. Relational expressions are less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=), and not equal to (<>). *See also* expression, logical expression, and mathematical expression.

Remote Access Services

A feature built into Windows NT and Windows 95 that enables users to log on to an NT-based LAN using a modem, X.25 connection, or WAN link. This feature is also known as Dial-Up Networking.

reporting supervisor

The supervisor who has primary responsibility for an agent. When an agent presses the Emergency key on the phoneset, the emergency call is presented to the agent's reporting supervisor. *See also* associated supervisor.

round robin routing table

A routing table that queues the first call to the first three sites in the routing table, then the second three sites, then the third three sites, and so on, until an agent is reserved at one of the sites. *See also* sequential routing table.

route

A group of trunks. Each trunk carries either incoming or outgoing calls to the switch. *See also* music route, RAN route.

routing table

A table that defines how calls are routed to the sites on the network. *See also* round robin routing table, sequential routing table.

S

sample script

A script that is installed with the Symposium Call Center Server client. Sample scripts are stored as text files in a special folder on the client. The contents of these scripts can be imported or copied into user scripts to create scripts for typical call center scenarios.

SCM

See Service Control Manager.

script

A set of instructions that relates to a particular type of call, caller, or set of conditions, such as time of day or day of week. *See also* master script, network script, primary script, and secondary script.

script variable

See variable.

second-level threshold

The value used in display thresholds that represents the highest value of the normal range for a given statistic. The system tracks how often the value for the statistic falls outside this value.

secondary directory number

A DN defined on the agent's phoneset as a Centrex line for incoming and outgoing non-ACD calls.

secondary script

Any script (other than a master, network, or primary script) that is referenced from a primary script or any other secondary script. There is no pegging of statistics for actions occurring during a secondary script. *See also* master script, network script, primary script, and script.

sequential routing table

A routing table method that always queues a call to the first three active sites in the routing table. *See also* round robin routing table.

server

A computer or device on a network that manages network resources. Examples of servers include file servers, print servers, network servers, and database servers. The Symposium Call Center Server is used to configure the operations of the call center. *See also* client.

service

A process that adheres to a Windows NT structure and requirements. A service provides system functionality.

Service Control Manager

A Windows NT process that manages the different services on the PC.

service level

The percentage of incoming calls answered within a configured number of seconds.

service level threshold

A parameter that defines the number of seconds within which incoming calls should be answered.

Simple Network Management Protocol

A set of protocols for managing complex networks. SNMP works by sending messages, called protocol data units (PDUs), to different parts of a network and then analyzing the responses.

site

1. A system using Symposium Call Center Server that can be accessed using SMI. 2. A system using Symposium Call Center Server and participating in Network Skill-Based Routing.

skillset

A group of capabilities or knowledge required to answer a specific type of call. *See also* local skillset, network skillset.

skillset intrinsic

A script element that inserts information about a skillset in a script. Skillset intrinsics return values such as skillsets, integers, and agent IDs. These values are then used in queuing commands. *See also* call intrinsic, intrinsic, time intrinsic, and traffic intrinsic.

skillset priority

An attribute of a skillset assignment that determines the order in which calls from different skillsets are presented to an agent. When an agent becomes available, calls might be waiting for several of the skillsets to which the agent belongs. The server presents the call queued for the skillset for which the agent has the highest priority.

source site

The site from which an incoming network call originates. *See also* destination site.

standby

In skillset assignments, a property that grants an agent membership in a skillset, but makes the agent inactive for that skillset.

supervisor

A user who manages a group of agents. *See also* associated supervisor, reporting supervisor.

supplementary ACD-DN

A DN associated with a primary DN. Any calls to the supplementary DN are automatically routed to the primary DN. A supplementary DN can be a toll-free (1-800) number.

switch

The hardware that receives incoming calls and routes them to their destination.

switch resource

A device that is configured on the switch. For example, a CDN is configured on the switch, and then is used as a resource with Symposium Call Center Server. *See also* acquired resource.

Symposium Call Center Server call

A call to a CDN that is controlled by the Symposium Call Center Server. The call is presented to the Incalls key on an agent's phoneset.

system-defined scripts

The Master_Script and the Network_Script (if NSBR is enabled). These scripts This script can be customized or deactivated by a user, but cannot be deleted. These scripts are This script is the first scripts executed for every local or network call arriving at the call center.

T**target site**

See destination site.

TCP/IP

See Transport Control Protocol/Internet Protocol.

telephony

The science of translating sound into electrical signals, transmitting them, and then converting them back to sound. The term is used frequently to refer to computer hardware and software that perform functions traditionally performed by telephone equipment.

threshold

A value for a statistic at which system handling of the statistic changes.

threshold class

A set of options that specifies how statistics are treated in reports and real-time displays. *See also* display threshold, pegging threshold.

time intrinsic

A script element that stores information about system time, including time of day, day of week, and week of year. *See also* call intrinsic, intrinsic, skillset intrinsic, and traffic intrinsic.

Token Ring

A PC network protocol developed by IBM. A Token Ring network is a type of computer network in which all the computers are arranged schematically in a circle.

traffic intrinsic

An intrinsic that inserts information about system-level traffic in a script. *See also* call intrinsic, intrinsic, skillset intrinsic, and time intrinsic.

transition mode

A skillset state in which the server presents already queued calls to a skillset. New calls queued to the skillset are given out-of-service treatment. *See also* night mode, out-of-service mode.

Transport Control Protocol/Internet Protocol

The communication protocol used to connect devices on the Internet. TCP/IP is the standard protocol for transmitting data over networks.

treatment

See call treatment.

trunk

A communications link between a PBX and the public central office, or between PBXs. Various trunk types provide services such as Direct Inward Dialing (DID trunks), ISDN, and Central Office connectivity.

U**user-created script**

A script that is created by an authorized user on the Symposium Call Center Server system. Primary and secondary scripts are user-created scripts.

user-defined script

A script that is modified by an authorized user on the Symposium Call Center Server system.

utility

A program that performs a specific task, usually related to managing system resources. Operating systems contain a number of utilities for managing disk drives, printers, and other devices.

V**validation**

The process of checking a script to ensure that all the syntax and semantics are correct. A script must be validated before it can be activated.

variable

A placeholder for values calculated within a script, such as CLID. Variables are defined in the Script Variable Properties sheet and can be used in multiple scripts to determine treatment and routing of calls entering the Symposium Call Center Server. *See also* call variable, global variable.

voice port

A connection from a telephony port on the switch to a port on the IVR system.

W**WAN**

See Wide area network.

Wide area network

A computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local area networks (LANs). The largest WAN in existence is the Internet.

workload scenarios

Sets of configuration values defined for typical patterns of system operations. Five typical workload scenarios (entry, small, medium, large, and upper end) are used in the Capacity Assessment Tool for capacity analysis for the Symposium Call Center Server.

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Nortel Networks Symposium Call Center Server Software Installation and Upgrade Guide

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