



Installation and Configuration Task List

CallPilot
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October 2002	Standard 1.0 of <i>CallPilot Installation and Configuration, Part 1: Installation and Maintenance Overview</i> is released for CallPilot 2.0 general availability.

November 2000

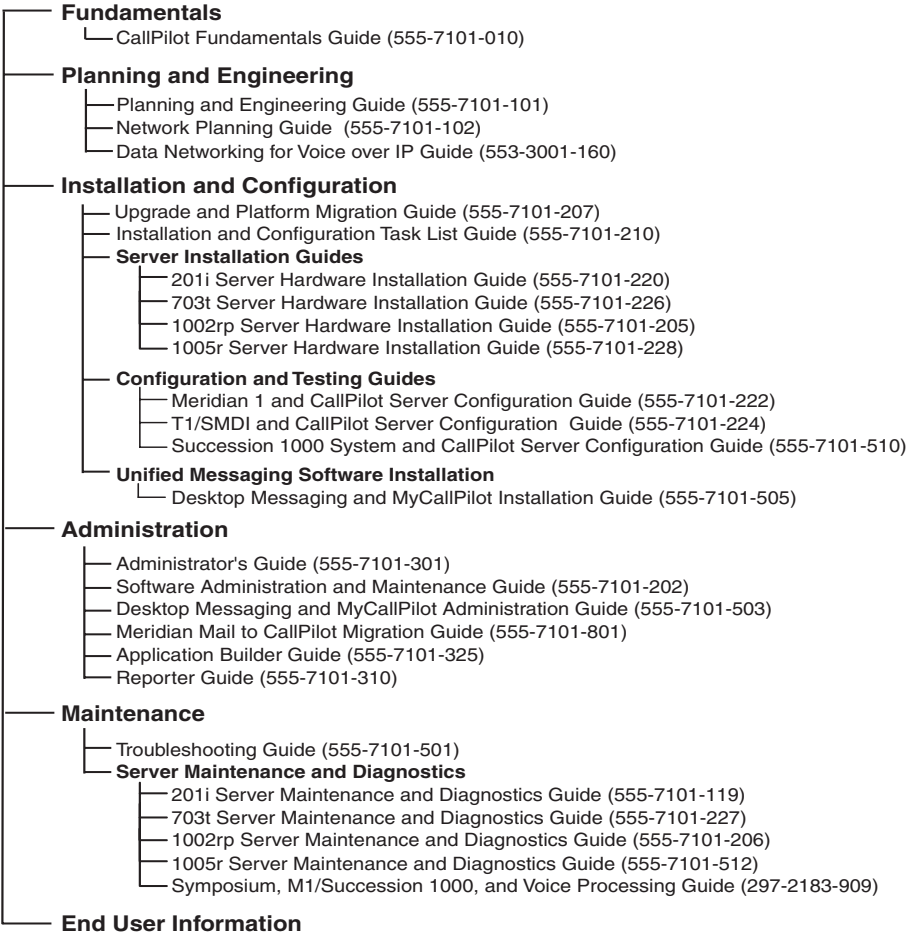
Standard 2.0 of *CallPilot Installation and Configuration, Part 1: Installation Flowchart and Worksheets* is released for CallPilot 1.07.

May 2000

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



CallPilot Customer Documentation Map



End User Cards

Unified Messaging Quick Reference Card
Unified Messaging Wallet Card
A-Style Command Comparison Card
S-Style Command Comparison Card
Menu Interface Quick Reference Card
Alternate Command Interface Quick Reference Card

End User Guides

Multimedia Messaging User Guide
Speech Activated Messaging User Guide
Desktop Messaging User Guide for Microsoft Outlook
Desktop Messaging User Guide for Lotus Notes
Desktop Messaging User Guide for Novell Groupwise
Desktop Messaging User Guide for Internet Clients
MyCallPilot User Guide

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Chapter 1

How to get Help

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

Getting Help from the Nortel Web site

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

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

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

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

Getting Help over the phone from a Nortel Solutions Center

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

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

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

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

Getting Help from a specialist by using an Express Routing Code

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

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

Getting Help through a Nortel distributor or reseller

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

Chapter 2

CallPilot installation and configuration

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Where to start

Using the *Installation and Configuration Task List*

The *CallPilot Installation and Configuration Task List* provides an overview of installing CallPilot* system hardware and software.

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

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

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

Note: To comply with the EU (European Union) RoHS directive, some of the part numbers now contain an E5 or E6 suffix. For example, part number NTRH2014 is now NTRH2014E6. The part numbers in this guide do not contain the suffix.

Installing a new system

For a new CallPilot installation, start at Chapter 3, “Installing a new CallPilot server.”

The checklists and worksheets required for the installation are in Appendix A, “Installation preparation checklists,” and Appendix B, “Configuration worksheets.”

Additional system tasks during or after installation

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

Note: Chapter 9, “Starting up and shutting down the CallPilot server”, appears in the guide for reference during the initial installation. These tasks are also used in maintenance operations where the server must be shut down, restarted, or powered up.

Related information

CallPilot Fundamentals Guide

For more information on the following topics, see the *CallPilot Fundamentals Guide*:

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

CallPilot guides

CallPilot installation, configuration, administration, and maintenance guides are stored on the CD-ROM supplied with your system. For a list of CallPilot documentation, see the document map on page 8.

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

Contacting technical support

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

Chapter 3

Installing a new CallPilot server

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Overview of installation tasks

The installation checklists in this chapter describe installing a new CallPilot server. The tasks are presented in the order in which they are to be completed.



CAUTION

Risk of software malfunction

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

For information on non-CallPilot software supported by Nortel, refer to the *CallPilot Distributor Technical Reference* (DTR).

ATTENTION

Meridian 1 and Succession* 1000 only:

For important considerations about using the ELAN Subnet in your network, see the section on the ELAN Subnet for Meridian 1 and Succession 1000, in the *CallPilot Planning and Engineering Guide*.

ATTENTION

This is not a system recovery procedure. To perform a system recovery, see Chapter 11, “Recovering from a system failure.”

Before you begin

Before installing CallPilot hardware and software, become familiar with the following information which you will need during installation:

- Appendix A, “Installation preparation checklists.”
- Appendix B, “Configuration worksheets.”
- CallPilot system information, such as safety guidelines, described in the *CallPilot Fundamentals Guide*
- installation background information described in the *CallPilot Planning and Engineering Guide*, such as requirements for using the Embedded LAN (Meridian 1 and Succession 1000 only)
- a high-level diagram of how CallPilot fits into your network in the server description section in the *CallPilot <server_model> Server Hardware Installation* guide for your server (for example, the *CallPilot 201i Server Hardware Installation Guide*)
- an overview of switch programming and call routing in the *<switch_model> and CallPilot Server Configuration* guide for your switch and server (for example, the *Meridian 1 and CallPilot Server Configuration Guide*)

Note: For information and procedures on installing Desktop Messaging and My CallPilot software, see the *Desktop Messaging Installation Guide*, and *Desktop Messaging Administration and Maintenance Guide*.

Preparing to install the CallPilot server

Step	Description	Time required	Check
1	Verify that the customer site is clean, properly laid out, and equipped. Complete the “Site inspection checklist” on page 100.	5 minutes, if the site meets all of the requirements	<input type="checkbox"/>
2	Ensure that you have the information and tools required to install the hardware: <ul style="list-style-type: none">■ Obtain the necessary network configuration information from the customer’s network administrator.■ Gather the necessary equipment, tools, and materials and complete the checklists:<ul style="list-style-type: none">■ “Required tools and materials” on page 104■ “Customer-supplied items checklist” on page 106	10 minutes, if you have all of the items you need	<input type="checkbox"/>

Step	Description	Time required	Check
3	<p>Unpack the server and supplied equipment, software, and documentation.</p> <p>Verify the items received against the Nortel packing list, and ensure that the correct equipment arrived. Ensure also that the serial number and keycode match and that all hardware is in good condition.</p> <p>Complete the following checklists to ensure that you have all components ordered:</p> <ul style="list-style-type: none"> ■ “CallPilot server hardware checklist” on page 109 ■ “CallPilot software media and documentation checklist” on page 115 	30 minutes	<input type="checkbox"/>
4	Inspect the server. Report any damage or missing components to Nortel.	10–30 minutes (based on your server model)	<input type="checkbox"/>
5	<p>For tower or rackmount servers, review the slot and IRQ assignment information provided in the <i>CallPilot <server_model> Server Hardware Installation</i> guide for your server.</p> <p>You need slot assignment information later in the installation. You may need the IRQ information for troubleshooting if you experience problems with the server.</p>	10 minutes	<input type="checkbox"/>

Step	Description	Time required	Check
6	<p>Review the “Network connectivity” section in the <i>CallPilot <server_model> Server Hardware Installation</i> guide for your server.</p> <p>This section provides an overview of how the CallPilot server is connected to the customer network.</p>	5 minutes	<input type="checkbox"/>
7	<p>If not already completed, fill out the configuration worksheets in Appendix B, “Configuration worksheets.”</p> <ul style="list-style-type: none">■ the “Switch or system configuration worksheet” on page 121■ the CallPilot server “Configuration Wizard worksheet” on page 127	20 minutes, if you have all of the information you need	<input type="checkbox"/>

Installing the CallPilot server

For instructions on installing the CallPilot server, refer to the *CallPilot <server_model> Server Hardware Installation* guide for your server.

Step	Description	Time required	Check
1	If your server is a rackmount server, install the power supply modules.	2 minutes	<input type="checkbox"/>
2	<p>If the 19-inch rack is not already installed, install it now. For instructions, refer to the rack documentation.</p> <p>ATTENTION</p> <p>If applicable, ensure that the rack meets seismic bracing requirements. For more information, refer to the documentation for your switch or system.</p>	Based on rack, location, and connections: 1 to 4.5 hours	<input type="checkbox"/>
3	Place the server hardware and peripheral devices in the location chosen for the server.	5 minutes, if you unpacked the items in the chosen location	<input type="checkbox"/>

Step	Description	Time required	Check
4	<p>Connect peripheral devices to the server.</p> <p>Peripheral devices include the following items, based on your server platform:</p> <ul style="list-style-type: none">■ external modem for remote access■ ELAN switch (layer 2) or hub (Meridian 1 or Succession Communication Server for Enterprise 1000 only)■ Nortel server subnet (NS; also known as CLAN) switch or hub (optional) <p>Note: To reduce the risk of infection from this network, do not connect CallPilot to the optional Nortel server subnet before antivirus programs and Nortel security updates are installed.</p> <ul style="list-style-type: none">■ external tape and CD/DVD-ROM or drives■ monitor, keyboard, and mouse■ software feature key adapter (tower and rackmount platforms only)	30 minutes	<input type="checkbox"/>
5	Power up the server.	Based on your server model	<input type="checkbox"/>

Connecting the switch to the CallPilot server

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

Step	Description	Time required	Check
1	For tower and rackmount platforms only: install the connectivity hardware for connecting the CallPilot server to the switch. <ul style="list-style-type: none">■ For Meridian 1 and Succession 1000, install the MGate card in the switch.■ For T1/SMDI switches, install T1 and SMDI devices (such as T1 line side cards and an SMDI IOC shelf).	15 minutes	<input type="checkbox"/>
2	Connect the CallPilot server to the switch as described in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.	15 minutes	<input type="checkbox"/>

Configuring the switch and CallPilot server

Step	Description	Time required	Check
1	<p>Configure the switch.</p> <p>For switch configuration information, refer to the “Switch or system configuration worksheet” on page 121 provided in the Appendix B, “Configuration worksheets.”</p> <p>For instructions, refer to configuring the switch or system in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.</p>	30 minutes	<input type="checkbox"/>

Step	Description	Time required	Check
2	<p>Logon to the CallPilot Server. The setup wizard will automatically launch and guide you through a number of setup steps prior to configuring your system. Use CallPilot Manager to logon to the server. Run the Configuration Wizard to configure the CallPilot server and change the operating system passwords.</p> <p>For server configuration information, refer to the “Configuration Wizard worksheet” on page 127 provided in the Appendix B, “Configuration worksheets.”</p> <p>For logon and configuration instructions, refer to:</p> <ul style="list-style-type: none"> ■ configuring CallPilot server software in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server ■ online Help for the Configuration Wizard 	20 minutes, plus up to 1 hour to apply the changes	<input type="checkbox"/>
3	<p>Restart the server and ensure that it can start CallPilot.</p> <p>For instructions, see “Restarting the server” on page 69.</p>	Based on your server model; at least 10 minutes	<input type="checkbox"/>

Step	Description	Time required	Check
4	<p>Change the CallPilotDist password for pcAnywhere (note: pcAnywhere is not used with the 201i).</p> <p>Note: Record the new password on the Configuration Wizard worksheet, “pcAnywhere password,” on page 129.</p> <p>For information on changing the pcAnywhere password, see the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.</p>	5 minutes	<input type="checkbox"/>

Testing CallPilot connectivity, services, and channels

For instructions, refer to “Testing the CallPilot installation” in the *<switch_model> and CallPilot Server Configuration* guide for your switch and server.

Step	Description	Approximate time required	Check
1	Check CallPilot system ready indicators to see if CallPilot is ready to accept calls.	10 minutes	<input type="checkbox"/>
2	Test the connection to the ELAN Subnet, if applicable.	1 minute, if the ping is successful	<input type="checkbox"/>
3	Test the connection to the CLAN switch or hub.	1 minute, if the ping is successful	<input type="checkbox"/>
4	Verify that CallPilot answers when you dial the Voice Messaging DN.	5–10 minutes, if the test is successful	<input type="checkbox"/>
5	Verify network connectivity to the CallPilot server by using a web browser to log on to the CallPilot server.	5 minutes	<input type="checkbox"/>
6	Verify that you can leave a message. Note: This task includes the first-time configuration of a Voice Messaging DN and test mailbox.	25 minutes	<input type="checkbox"/>
7	Verify that you can retrieve a message.	2 minutes	<input type="checkbox"/>

Step	Description	Approximate time required	Check
8	Verify that each call channel and multimedia channel is functioning correctly.	2 hours	<input type="checkbox"/>

Other administrative tasks

Step	Description	Time required	Check
1	<p>Perform a full system backup of the CallPilot system.</p> <p>For instructions on performing the backup, refer to “Backing up and restoring CallPilot information” in the <i>CallPilot Administrator’s Guide</i> (555-7101-301) and CallPilot online Help.</p> <p>ATTENTION</p> <p>Nortel recommends that the backup also be stored in a safe location off-site.</p>	Based on server model; up to 3 hours	<input type="checkbox"/>
2	<p>For most CallPilot customers: Verify web security and install CallPilot Manager and Reporter on a stand-alone web server.</p> <p>When you install CallPilot Manager on a stand-alone web server, you can choose the option of installing CallPilot Reporter.</p> <p>Note: Ensure that the web server meets requirements. Nortel recommends an external security audit.</p> <p>For instructions, refer to “Installing CallPilot administrative software on a stand-alone web server” in the <i>CallPilot Software Administration and Maintenance</i> guide.</p>	10 minutes, if the web server meets the requirements for CallPilot Manager	<input type="checkbox"/>

Step	Description	Time required	Check
3	<p>Install pcAnywhere on the stand-alone web server and a remote PC, and configure remote administrations.</p> <p>Note: Nortel requires pcAnywhere (supplied by the customer) for remote support.</p>		
4	<p>If purchased by the customer, install either or both:</p> <ul style="list-style-type: none">■ Desktop Messaging on users’ personal computers.■ My CallPilot on the CallPilot server or stand-alone web server. <p>For instructions, see “Desktop Messaging and My CallPilot installation tasks,” on page 35.</p>		

Desktop Messaging and My CallPilot installation tasks

Task	Reference
1 Review and understand <ul style="list-style-type: none">■ the installation process■ Desktop Messaging requirements■ My CallPilot requirements	<i>Desktop Messaging and My CallPilot Installation Guide</i>
2 Complete the Preinstallation checklist.	<i>Desktop Messaging and My CallPilot Installation Guide</i> , “Desktop Messaging and My CallPilot preinstallation checklist”
3 Configure the CallPilot server to support Desktop Messaging and My CallPilot.	The completed “Desktop Messaging and My CallPilot preinstallation checklist”
4 Install or upgrade the Desktop Messaging software on users’ personal computers.	<i>Desktop Messaging and My CallPilot Installation Guide</i> , “Installing Desktop Messaging”
5 Install the My CallPilot software.	<i>Desktop Messaging and My CallPilot Installation Guide</i> , “Installing My CallPilot”

Chapter 4

Upgrading CallPilot

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

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

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

You cannot downgrade to a previous version of CallPilot software.

Upgrade documentation

For instructions on upgrading your CallPilot server, refer to the *CallPilot Upgrade and Platform Migration Guide* 555-7101-207.

Chapter 5

Expanding CallPilot features and capacity

Perform a CallPilot software expansion when you want to

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

ATTENTION

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

Feature expansion checklist

Step	Description	Time required	Check
1	<p>Compare the current CallPilot system configuration with the expansion keycode label, and ensure that</p> <ul style="list-style-type: none">■ the serial number matches■ the feature limits on the keycode label are equal to or greater than the limits on the CallPilot server <p>If the information on the keycode does not match the system configuration, the expansion may not succeed.</p>	5 minutes	<input type="checkbox"/>

Step	Description	Time required	Check
2	<p>Install additional hardware, if required.</p> <p>Note: Your system may require additional switch programming with the new hardware.</p> <p>If your CallPilot expansion includes an increase in system capacity, you may need to</p> <ul style="list-style-type: none">■ install and configure more MGate cards on the switch (tower and rackmount platforms only). For instructions, refer to the CallPilot configuration guide for your switch and server.■ ensure the Meridian 1 or CS1000 system is properly load-balanced when you add MGate cards. For instructions, refer to the <i>Communication Server 1000M and Meridian 1 Planning and Engineering</i> guide (553-3021-120) and the <i>CallPilot Planning and Engineering</i> guide (555-7101-101).■ perform a platform migration. For instructions, refer to the <i>CallPilot Upgrade and Platform Migration</i> guide.■ install MPB96 boards (tower and rackmount platforms only) or MPC-8 cards (201i). For instructions, refer to the <i>Server Maintenance and Diagnostics</i> guide for your server. <p>Note: If the Windows New Hardware Found detection wizard displays, click the Next button and select Nortel MPB driver.</p>	30 minutes to 1 hour	<input type="checkbox"/>

Step	Description	Time required	Check
3	<p>Log on to the server, and then run the Configuration Wizard.</p> <p>For logon and configuration instructions, refer to the following:</p> <ul style="list-style-type: none">■ “Configuring the CallPilot server software” in the CallPilot configuration guide for your switch and server■ the Configuration Wizard online Help	20 minutes, plus up to 1 hour to apply the changes	<input type="checkbox"/>
4	<p>Restart the server and ensure that CallPilot can start.</p>	Based on your server model; 10 minutes	<input type="checkbox"/>
5	<p>Ensure that CallPilot can receive calls.</p> <p>For instructions, refer to “Verifying that CallPilot can receive calls” in the CallPilot configuration guide for your switch and server.</p>	5 minutes	<input type="checkbox"/>
6	<p>Ensure that all call and multimedia channels and features work as expected.</p> <p>This includes sending a fax, logging in to the mailbox using Speech Activated Messaging, using the phoneset to read e-mail, verifying that Desktop Messaging works, and using Reporter to generate the relevant reports.</p> <p>For instructions, refer to the section on testing the CallPilot software and channels in the CallPilot configuration guide for your switch and server.</p>	2 hours	<input type="checkbox"/>

Step	Description	Time required	Check
7	<p>Create a backup of the CallPilot system.</p> <p>For instructions on performing the backup, refer to “Backing up and restoring CallPilot information” in the <i>CallPilot Administrator’s Guide</i> (555-7101-301).</p> <p>ATTENTION</p> <p>Nortel recommends that the backup be stored in a safe location off-site.</p>	Based on server model; up to 3 hours	<input type="checkbox"/>

Chapter 6

CallPilot server platform migration

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

The unsupported platforms are:

- 200i
- 702t
- 1001rp

Platform Migration documentation

For instructions on migrating your CallPilot server, refer to the *CallPilot Upgrade and Platform Migration Guide* (555-7101-207).

Chapter 7

Configuring and administering the CallPilot system

A CallPilot administrator can

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

Logging on to the CallPilot server with CallPilot Manager

Introduction

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

The logon process is completed in two stages:

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

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

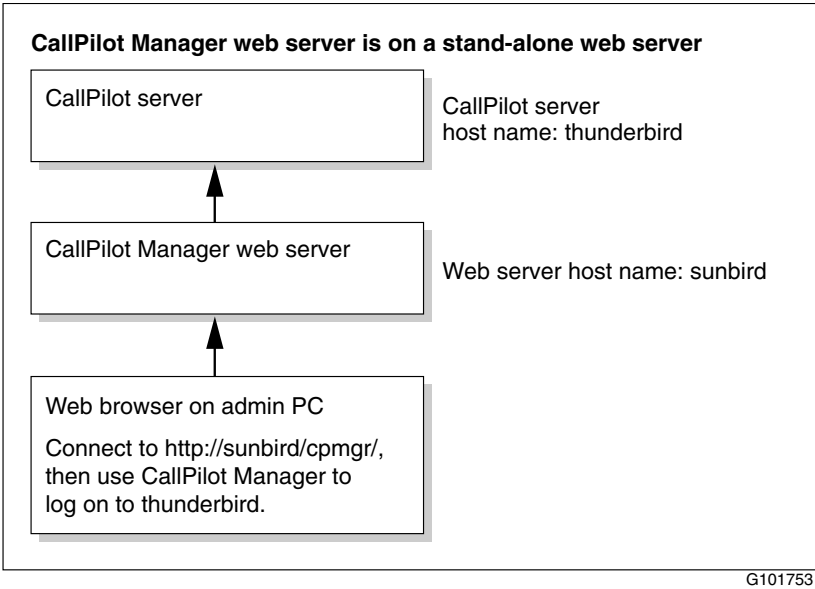
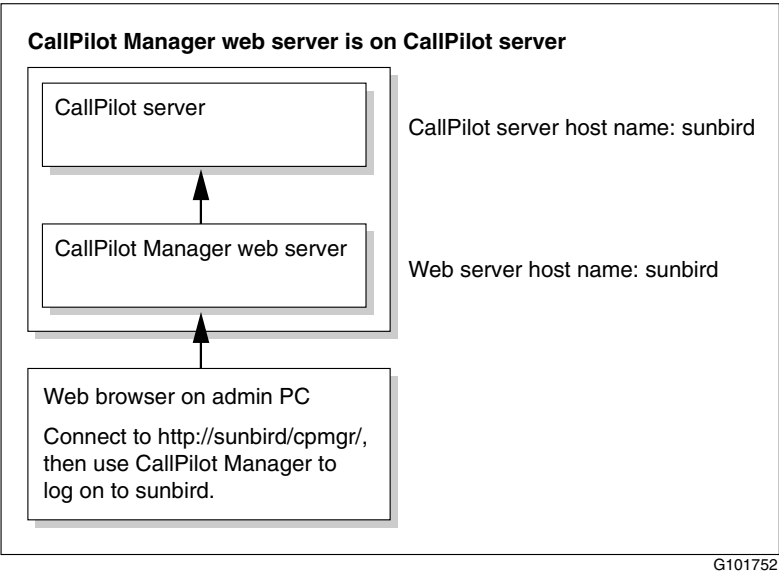
The URL syntax is `http://<web server host name or IP address>/cpmgr/`.

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

Relationship of the CallPilot Manager web server to the CallPilot server

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

See the following diagrams:



To log on to the CallPilot server

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

**IF you are launching
the web browser on THEN**

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

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

Example: <http://sunbird/cpmgr/>
When the connection is established, the
CallPilot Manager - Login window appears.
Continue with step 2.

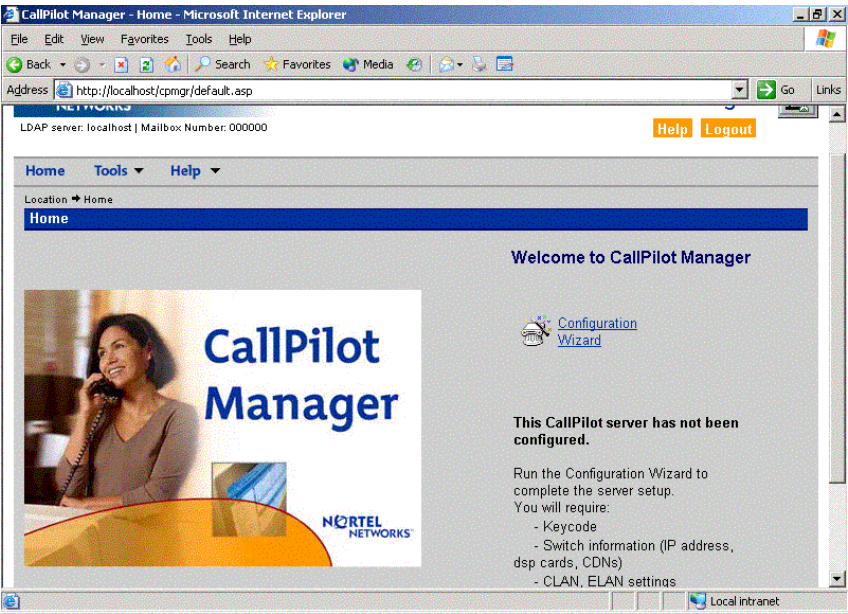


Note: The URL automatically appears as `http://<host name or IP address>/cpmgr/login.asp`. On the CallPilot server, the URL is `http://localhost/cpmgr/login.asp`.

- 2 Type the administrator mailbox number and password.
 - administrator mailbox number (default): **000000**
 - administrator mailbox password (default): **124578**.
- 3 Do one of the following:
 - Choose a server or location from the list of preconfigured servers or locations in the Preset server list box. Or, choose the Last Server Accessed item.
 - Type the CallPilot server host name or IP address in the Server box.
 - If the CallPilot server to which you are connecting has Network Message Service (NMS) installed, type the CallPilot server host name or IP address in the Server box, and then type the name of the switch location on which the administration mailbox resides in the Location box.

4 Click Login.

Result: The main CallPilot Manager window appears.



On-site configuration and administration tasks

Task	Reference
1 For customers with more than 1000 mailboxes: Add specialized administrators.	CallPilot Manager online Help topic “Delegating administrative tasks”
2 Set up mailbox security.	CallPilot Manager online Help topic “Securing the CallPilot system” > “Configuring mailbox security”
3 Customize restriction permission lists (RPLs).	CallPilot Manager online Help topic “Securing the CallPilot system” > “Maintaining restriction permission lists (RPLs)” > “Customizing RPLs”
4 Verify basic messaging defaults.	CallPilot Manager online Help topic “Configuring CallPilot services” > “Configuring CallPilot messaging service defaults” > “Changing messaging defaults”
5 If purchased by the customer: Configure CallPilot networking.	CallPilot Manager online Help topic “Administering a messaging network”
6 Use the Configuration Worksheet as a reference to add service DNS (SDNs) for custom applications (including voice menus).	CallPilot Manager online Help topic “Configuring CallPilot services” > “Adding and deleting inbound SDNs”
7 Configure user creation templates.	CallPilot Manager online Help topic “Managing mailbox creation and privileges” > “Using templates to create mailboxes”

Task	Reference
8 Customize system prompts.	CallPilot Manager online Help topic “Configuring CallPilot services” > “Configuring CallPilot messaging service defaults” > “Customizing system prompts”
9 If purchased by the customer: Configure fax services.	“Fax services configuration tasks” on page 57 of this document
10 If purchased by the customer: Configure speech activated messaging services.	“Speech activated messaging service configuration tasks” on page 58 of this document
11 If purchased by the customer: Configure E-mail by Phone options.	“E-mail By Phone configuration tasks” on page 59 of this document
12 Test CallPilot operation: a. Add test mailboxes. b. Verify CallPilot Manager search functionality. c. Verify operation of new unified messaging components. d. Verify mailbox access controls.	<ul style="list-style-type: none"> ■ CallPilot Manager online Help topic “Administering mailboxes” > “Adding and removing mailboxes” ■ CallPilot Manager online Help topic “Securing the CallPilot system” > “Configuring mailbox security”
13 Add custom applications (including voice menus).	<ul style="list-style-type: none"> ■ CallPilot Manager online Help topic “Configuring CallPilot services” ■ <i>CallPilot Application Builder Guide</i> ■ CallPilot Application Builder online Help topics

Task	Reference
<p>14 Set up basic reports to monitor the system.</p> <p>Note: This requires that CallPilot Manager and Reporter be installed on a stand-alone web server.</p>	<ul style="list-style-type: none">■ CallPilot Manager online Help topic “Monitoring the CallPilot system” > “Running reports”■ <i>CallPilot Reporter Guide</i>
<p>15 Add remaining mailbox owners and shared distribution lists (SDLs).</p>	<p>CallPilot Manager online Help topic “Administering mailboxes” > “Adding and removing mailboxes” > “Adding a group of mailboxes in a single operation”</p>

Desktop Messaging and My CallPilot configuration tasks

Task	Reference
1 Configure mailbox classes to enable mailbox owners to access Desktop Messaging and My CallPilot.	CallPilot Manager online Help topic “Managing mailbox creation and privileges” > “Using mailbox classes to manage mailbox privileges” → “Permitting use of optional unified messaging components”
2 Configure and apply the Desktop Messaging restriction permission list (RPL) to control access to Desktop Messaging and My CallPilot.	CallPilot Manager online Help topic “Securing the CallPilot system” → “Maintaining restriction permission lists (RPLs)” > “Applying RPLs”
3 Define support information for My CallPilot users.	<i>CallPilot Desktop Messaging and My CallPilot Administration and Maintenance Guide</i> , “CallPilot server configuration for My CallPilot services”
4 If mailbox owners are to have E-mail by Phone capability: Configure E-mail by Phone.	“E-mail By Phone configuration tasks” on page 59 of this document
5 If mailbox owners are to have remote text notification capability: Configure the appropriate user creation templates with remote text notification options.	CallPilot Manager online Help topic “Managing mailbox creation and privileges” > “Using templates to create new mailboxes”

Fax services configuration tasks

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

Speech activated messaging service configuration tasks

Task	Reference
1 Update or add mailbox classes to enable speech activated messaging for mailbox class members.	CallPilot Manager online Help topic “Managing mailbox creation and privileges.” > “Using mailbox classes to manage mailbox privileges” > “Permitting use of optional unified messaging components” > “Speech activated messaging” > “Permitting mailbox class members to speak CallPilot phoneset commands”

E-mail By Phone configuration tasks

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

Chapter 8

Testing the CallPilot system and applications

Once a CallPilot system has been installed, upgraded, or migrated to a different platform, perform the “Onsite testing tasks.”

Onsite testing tasks

Task	Reference
1 Test the CallPilot connectivity, services, and channels.	<i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server, “Testing the CallPilot installation” Also, refer back to “Testing CallPilot connectivity, services, and channels,” on page 31 in this task list guide for an overview of configuration testing performed during installation.
2 Add test mailboxes.	CallPilot Manager online Help topic “Administering mailboxes” > “Adding and removing mailboxes” > “Adding mailboxes, one at a time”
3 Verify that you can log on to the mailbox.	<i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server, “Testing the CallPilot installation”

Task	Reference
4 Test mailbox search functions.	CallPilot Manager online Help topic “Administering mailboxes” > “Finding mailboxes, administrators or directory entries”
5 If pcAnywhere was installed on a remote computer: Test remote administration of the CallPilot server.	<i>CallPilot Administrator’s Guide</i> , “Configuring remote administration of the CallPilot server”
6 If Reporter is installed: Test the Reporter link and set up monitoring and reports.	<ul style="list-style-type: none"> ■ <i>CallPilot Administrator’s Guide</i>, “Learning about CallPilot features” ■ <i>CallPilot Reporter Guide</i>
7 If Application Builder is installed: Test the Application Builder link and ensure the availability of existing custom applications.	<ul style="list-style-type: none"> ■ <i>CallPilot Administrator’s Guide</i>, “Understanding CallPilot features and services” ■ <i>CallPilot Application Builder Guide</i>

Chapter 9

Starting up and shutting down the CallPilot server

In this chapter

Stopping and starting channels	64
Restarting the server	69
Powering down the server	73
Powering up the server	78

Stopping and starting channels

Introduction

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

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

Methods for taking channels off duty

There are two ways to take channels off duty:

- **Courtesy stop channels (preferred method).**
When you courtesy stop channels, CallPilot waits until the channels are no longer active before taking them off duty, instead of suddenly terminating active calls.
- **Stop channels.**
When you stop channels, you suddenly take them off duty and terminate all active calls.

ATTENTION

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

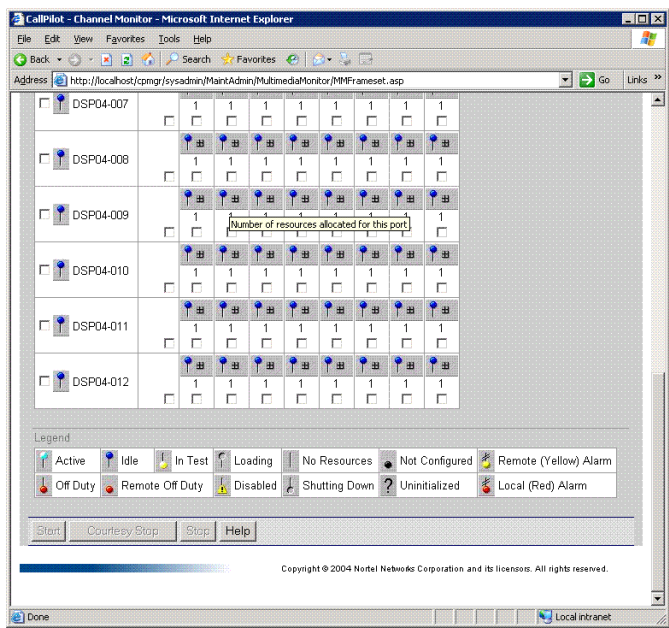
To courtesy stop CallPilot, use the following:

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

To stop or start channels

- 1 Log on to the CallPilot server with CallPilot Manager.
For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 48.
- 2 In CallPilot Manager, click Maintenance → Multimedia Monitor.

Result: The Multimedia Monitor screen appears, showing the channels associated with each DSP.



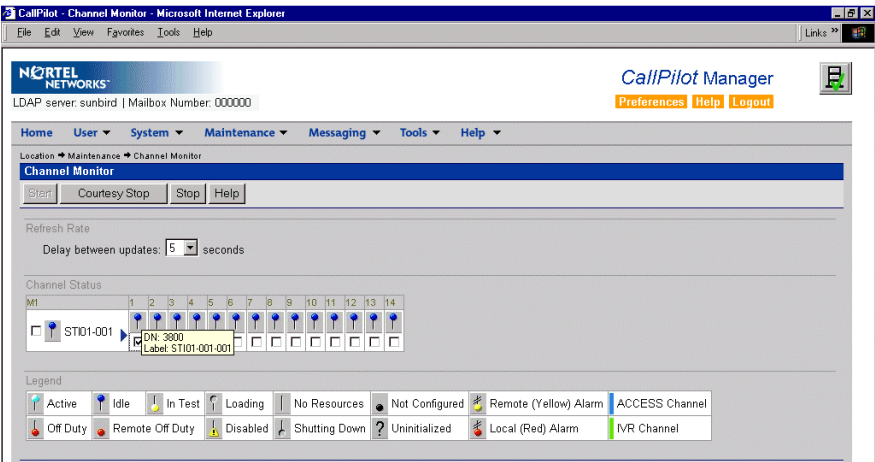
ATTENTION Courtesy stop is available only at the individual channel level. Therefore, to take the CallPilot system out of service, you must select each channel before clicking Courtesy Stop.

- 3 Select the check box for each DSP channel.
- 4 Do one of the following:

IF you want to	THEN
take the selected channels off duty	<p>do the following:</p> <ul style="list-style-type: none">a. Click Courtesy Stop. Note: If the Courtesy Stop button is not available, wait a few seconds for the screen to refresh. Result: You are asked to confirm the Courtesy Stop.b. Click OK. Result: The selected DSP channels change to off-duty status.
put the selected channels on duty	<p>click Start.</p> <p>Result: The selected DSP channels change to on-duty status.</p>

- 5 Click Maintenance → Channel Monitor.

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



ATTENTION

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

- 6 Select the check box for each DS0 channel.

7 Do one of the following:

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

Restarting the server

When to restart the server

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

- want to put software changes into effect
- are attempting to resolve operational problems
- have been instructed to do so

ATTENTION

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

For instructions, see “Stopping and starting channels” on page 64.

ATTENTION

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

- Perform the server restart during off-hours only.
- Inform mailbox users and other administrators in advance when you will be restarting the server. This allows them to ensure that their Desktop Messaging, web messaging, and administration sessions are logged off.

Before you begin

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

To restart the server

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

- 1 Log on to the server with CallPilot Manager.
For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 48.
- 2 Courtesy stop all call channels.
For instructions, see “Stopping and starting channels” on page 64.
- 3 Do one of the following:

IF you are	THEN
at the server	continue to next step.
at a PC connected remotely to the server	do the following: <div>a. Use pcAnywhere to connect to and log on to the CallPilot server.</div> <div>b. Continue to next step.</div>

- 4 Close all applications on the server.
Note: Applications that you are unable to close are automatically closed when you perform the operating system shutdown.
- 5 Press Ctrl+Alt+Delete.
Note: Shutting down the server software by pressing the Ctrl+Alt+Delete keys closes database files properly and reduces the time to restart the server.
Result: The Windows Security dialog box appears.

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

What do you want to do?	Choose Restart from the drop-down menu.
Select the option that best describes why you want to shut down the computer.	<p>Choose one of the following:</p> <ul style="list-style-type: none">■ Other (Planned)■ Hardware Maintenance (Planned)■ Hardware Installation (Planned)■ Operating system: Reconfiguration (Planned)■ Application: Maintenance (Planned)■ Application: Installation (Planned)■ Security Issue
Comment	If you selected “Other (Planned)” above, the OK button is unavailable. You must add a comment to enable the button.

7 Click OK.

Result: The server shuts down and then restarts.

Note: To interpret the diagnostic results that appear during the restart, refer to the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

8 When the operating system logon prompt appears, press Ctrl+Alt+Delete to log on.

Result: You are prompted for an operating system user name and password.

9 Enter **Administrator** as the user name.

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

- 10 Enter the password, and then click OK.

Result: The CallPilot server software starts.

ATTENTION

Wait 10 minutes before proceeding with step 11.

- 11 Log on to the server with CallPilot Manager.

For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 48.

- 12 Start the DSP and DS0 channels on the Multimedia Monitor and Channel Monitor screens in CallPilot Manager.

For instructions, see “Stopping and starting channels” on page 64.

- 13 Ensure that CallPilot is ready to accept calls.

For instructions, refer to “Checking that CallPilot is ready to accept calls” in the <switch_model> and *CallPilot Server Configuration* guide for your switch and server.

Powering down the server

When to power down the server

Powering down a tower or rackmount server

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

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

Powering down a 201i server

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

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



CAUTION

Risk of equipment damage

When powering down the 201i, do not simply unseat the 201i. The 201i server obtains power from the shelf. Use the procedure “To power down the server,” on page 74.

ATTENTION

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

ATTENTION

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

For instructions, see “Stopping and starting channels” on page 64.

ATTENTION

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

- Power down the server during off-hours only.
- Inform mailbox users and other administrators in advance when you will be powering down the server. This allows them to ensure that their Desktop Messaging, web messaging, and administration sessions are logged off.

Before you begin

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

To power down the server

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

- 1 Log on to the server with CallPilot Manager.

For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 48.

- 2
- Courtesy stop all call channels.
- For instructions, see “Stopping and starting channels” on page 64.
- 3
- Do one of the following:

IF you are	THEN
at the server	continue to next step.
at a PC connected remotely to the server	do the following: <div>a. Use pcAnywhere to connect to and log on to the CallPilot server.</div> <div>b. Continue to next step.</div>

- 4
- Close all applications on the server.
- Note:** Applications that you are unable to close are automatically closed when you perform the operating system shutdown.
- 5
- Press Ctrl+Alt+Delete.
- Note:** Shutting down the server software by pressing the Ctrl+Alt+Delete keys closes database files properly and reduces the time to restart the server
- Result:** The Windows Security dialog box appears.

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

What do you want to do?	Choose Shut down from the drop-down menu.
Select the option that best describes why you want to shut down the computer.	<div>Choose one of the following:</div> <ul style="list-style-type: none">■ Other (Planned)■ Hardware Maintenance (Planned)■ Hardware Installation (Planned)■ Operating system: Reconfiguration (Planned)■ Application: Maintenance (Planned)■ Application: Installation (Planned)■ Security Issue
Comment	If you selected “Other (Planned)” above, the OK button is unavailable. You must add a comment to enable the button.


7 Click OK.

Result: Server shutdown begins.

8 Wait for the following message to appear:

It is now safe to turn off your computer.

9 Do one of the following:

IF your server is	THEN
a tower or rackmount server	press the server power switch.
a 201i server	<div>do the following:<div><div>a. Ensure that DOWN appears on the server hex display.<div><div>Note: The red LED power status indicator remains lit during the shutdown until the system is restarted.</div></div></div></div></div> <div><div><div></div><div><div>CAUTION</div><div><div>Risk of equipment damage</div><div>Wait at least 2 minutes before removing the 201i to allow the drive to park the head.</div></div></div></div></div> <div><div>b. Remove the server from the switch.</div></div>

Powering up the server

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

To power up the server

- 1 Ensure that all peripheral devices are powered up.

Notes: If your server is a 201i server:

- Ensure that the switch shelf is also powered up.
- Ensure that a monitor is connected during the power-up sequence.
Note: The monitor is connected only when you need it. The 201i server is not intended to operate with a permanent monitor connection.

- 2 Do the following:

IF your server is	THEN
a tower or rackmount server	press the server power switch to start the server.
a 201i server	do the following: <ul style="list-style-type: none">a. Push the server gently but firmly until it is flush with the switch backplane. Result: The server beeps for 3 seconds to indicate that power is being received.b. Close the lock latches to secure the server to the backplane.c. Ensure that the power status LED is lit.

3 Watch the start-up sequence as follows:

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

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

IF your server is	THEN
a tower or rackmount server	The operating system start sequence begins. When the start sequence is completed, the operating system logon prompt appears on the monitor. If the logon prompt does not appear, see “Troubleshooting start-up problems” in the <i>CallPilot <server_model> Server Maintenance and Diagnostics</i> guide for your server.

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

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

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

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

- 6 Enter the user name (Administrator appears automatically in the field), and the password.

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

- 7 Click OK.

Result: The CallPilot server software starts.

ATTENTION Wait 10 minutes before proceeding with next step.

- 8 Log on to the server with CallPilot Manager.

For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 48.

- 9** Start the DSP and DS0 channels on the Multimedia Monitor and Channel Monitor windows in CallPilot Manager.

For instructions, see “Stopping and starting channels” on page 64.

- 10** Ensure that CallPilot is ready to accept calls.

For instructions, refer to “Checking that CallPilot is ready to accept calls” in the CallPilot configuration guide for your switch and server.

Chapter 10

Troubleshooting system problems

In this chapter

Overview	84
Using the Installation and Configuration guides	86
Using the CallPilot Administrator's Guide	91

Overview

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

Resources

Sources of documentation available for resolving system problems are the:

- *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server
- *CallPilot Administrator's Guide* (555-7101-301)
- *Troubleshooting Guide* (555-7101-501)

Tools

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

Type	Tools	
Generic tools	■ TCP/IP diagnostics	
Operating system tools	■ Diagnostics	
	■ Event Viewer	
CallPilot tools	■ LEDs and HEX display (201i servers only)	■ System Event Log
	■ start-up sequence and diagnostic codes	■ installation and configuration log files

Type	Tools
CallPilot tools (continued)	<div><div><div>■ CallPilot System Configuration (to display switch and server settings)</div><div>■ Disk Usage window</div><div>■ Server Performance Monitor</div></div><div><div>■ Event Browser</div><div>■ Alarm Monitor</div><div>■ Maintenance window</div><div>■ Reporter</div><div>■ Channel Monitor</div><div>■ Multimedia Monitor</div></div></div>
CallPilot system utilities	<div><div>■ Diagnostics utility</div><div>■ PEP Maintenance utility</div><div>■ System Monitor</div></div>

Using the Installation and Configuration guides

Introduction

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

LEDs

Server type	Description
tower or rackmount server	<p>The tower and rackmount servers provide LEDs on their front panel, on DVD/CD-ROM and tape drives, and on network interface cards. These LEDs indicate the operating status of the server or drive. On the network interface card, the LEDs also indicate if network activity is present.</p>
201i server	<p>The LEDs on the 201i server faceplate indicate when</p> <ul style="list-style-type: none">■ the server and MPC-8 cards are in use■ the network interfaces, hard drive, and SCSI device are in use (201i server only)■ it is safe to remove the server from the switch, or the MPC-8 card from the server <p>The HEX display on the 201i server faceplate displays messages that appear during start-up or normal server operation.</p> <p>For more information, refer to “LED and HEX displays” in the <i>CallPilot <server_model> Server Maintenance and Diagnostics</i> guide for your server.</p>

Start-up sequence and diagnostic codes

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

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

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

Log files

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

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

For more information, refer to “Viewing installation and configuration log files” in the *CallPilot Software Administration Guide*.

Operating system Diagnostics and Event Viewer

The operating system Diagnostics window allows you to view details concerning the system and network components.

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

For more information, refer to “Performing operating system online diagnostics” in the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

TCP/IP diagnostics

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

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

For more information, refer to “Invoking and interpreting TCP/IP diagnostics” in the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

CallPilot Manager

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

- Event Browser

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

- Alarm Monitor

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

- Maintenance

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

- **Channel and Multimedia Monitors**

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

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

For more information about using CallPilot Manager, refer to the following:

- “Logging on to the CallPilot server with CallPilot Manager” in the *CallPilot Software Administration Guide*
- the CallPilot Manager online Help
- “Using CallPilot Manager to monitor hardware status” in the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server

CallPilot system utilities

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

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

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

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

The System Monitor provides the following information:

- the status of all CallPilot services, multimedia channels, and call channels

- details about the CallPilot system, such as the features purchased, keycode, serial number, and IP addresses

For more information about these utilities, refer to the “Using CallPilot system utilities” chapter in the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

Using the CallPilot Administrator's Guide

Introduction

The CallPilot Manager online Help and the *CallPilot Administrator's Guide* (555-7101-301) provide valuable information for monitoring system performance.

The CallPilot Manager online Help and the *CallPilot Administrator's Guide* (555-7101-301) both describe how to

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

Accessing the *CallPilot Administrator's Guide*

The *CallPilot Administrator's Guide* is provided in the following locations:

- on the CallPilot Documentation CD-ROM
 - in the “Installation and Administration” area of CallPilot Manager
- To access the “Installation and Administration” area, click the orange Help button in CallPilot Manager.

Viewing and filtering server events

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

You can set the filter to display

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

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

Monitoring the CallPilot server

Monitoring activities include the following:

- viewing switch configuration and server settings

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

- monitoring disk space

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

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

- monitoring the database

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

Possible reasons for database problems include the following:

- Operational measurement statistics are too detailed or stored for too long.
- The system is under-engineered.

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

- monitoring server performance

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

Managing CallPilot channels

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

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

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

Troubleshooting call service problems

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

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

- being unable to use the Outcalling service because channels are not available
This can occur if the channel allocation is not spread evenly, or channels are out of service or faulty.
- experiencing a high rate of failures because of incorrect configuration or because the retry limits are exceeded

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

- busy
- no answer
- answered, but no DTMF confirmation was provided, or the call was terminated before delivery could take place

Remote Notification failures can occur because of the following:

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

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

Troubleshooting system operation problems

The following types of system operation problems can occur:

- Alarms are generated despite no apparent system problem.

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

- Calls are not answered.

Possible causes include the following:

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

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

- Calls are answered, but no prompts are heard.

Possible causes include the following:

- There is a possible error in the application that supports the requested service.
- There is a problem with the DS0 channel or the DS30X link.

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

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

- The monitor shows a blue screen.

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

Chapter 11

Recovering from a system failure

The operating system and CallPilot server software are preinstalled at the factory. However, if your CallPilot system experiences a hard drive failure or your system does not work properly, you may be instructed by your support representative to replace the hard drive, rebuild the system, or both.



CAUTION

Risk of software malfunction

- Nortel recommends that you open a support ticket with your technical support group before you proceed with a system rebuild.
- After the system recovery, do not install software that is not provided with CallPilot. Software that is not approved by Nortel is not supported and can cause CallPilot to malfunction.

More information

For more information, refer to the section on recovering a system in the *CallPilot Software Administration and Maintenance Guide*.

Appendix A

Installation preparation checklists

In this chapter

Site inspection checklist	100
Required tools and materials	104
Customer-supplied items checklist	106
CallPilot server hardware checklist	109
CallPilot hardware and documentation spares checklist	114
CallPilot software media and documentation checklist	115
Preinstalled software	117

Site inspection checklist

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

Check	Description
<input type="checkbox"/>	<p>Ensure that a water fire retardant system is not present in the chosen location.</p> <p>If this system is activated, this could severely impact the ability of the CallPilot system to operate.</p>
<input type="checkbox"/>	<p>Ensure that there are no heat sources near the peripheral equipment.</p> <p>The CallPilot server environment must be properly cooled.</p>
<input type="checkbox"/>	<p>Ensure that the area is isolated from strong electromagnetic fields and electrical noise sources such as air conditioners, large fans, motors, radio or TV transmitters, or high-frequency security devices.</p>
<input type="checkbox"/>	<p>Ensure that the area is clean and clear of any debris.</p>
<input type="checkbox"/>	<p>If the CallPilot server is a rackmount server, install the 19-inch rack.</p> <p>For instructions, refer to the rack documentation.</p> <p>ATTENTION</p> <p>If applicable, ensure that the rack meets seismic bracing requirements. For more information, refer to the documentation for your switch or system.</p>

Check	Description
-------	-------------

- | | |
|--------------------------|--|
| <input type="checkbox"/> | Ensure that there is adequate space for all equipment. <ul style="list-style-type: none">■ If your server is a tower or rackmount server, ensure that there is adequate space for access to the front, side, and rear panels of the server.■ Ensure that there is adequate space for air flow around the peripheral equipment, for ventilation. |
| <input type="checkbox"/> | Ensure that there is a desk, shelf, or table available for the monitor, keyboard, mouse, and modem. |
| <input type="checkbox"/> | Ensure that an external analog phone line is available for the modem. |

Note: The line should not be connected to the customer's switch. If the switch goes down, the CallPilot server cannot be supported from a remote location.

Check	Description
<input type="checkbox"/>	<p>Ensure that a single-point ground reference is available for all the power outlets serving the CallPilot server and its peripherals.</p> <p>Before the CallPilot server installation, a qualified electrician must implement the single-point ground reference requirement between the power outlets of the CallPilot server and the power outlets of the switch. Refer to the section on single-point grounding requirements in <i>CallPilot Fundamentals</i> for further details.</p> <p>Provide a sufficient number of properly grounded power outlets or power bars for all equipment. You need one outlet for each of the following items:</p> <ul style="list-style-type: none"> ■ server (if your server is a tower or rackmount platform) ■ web-enabled administration PC that has network connectivity to CallPilot, or monitor, or both ■ modem (remote maintenance modem) ■ external CD-ROM drive (if your server is a 201i server) ■ external tape drive (if your server is a 201i server, the drive is optional) ■ external SLR75 tape drive if your server is a 1005r ■ ELAN Subnet and Nortel server subnet switches or hubs <p>ATTENTION</p> <p>A Class A switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements.</p> <ul style="list-style-type: none"> ■ Symposium* Call Center Server (if installed) ■ customer-supplied network equipment (if required) ■ uninterruptible power supply (UPS) (if installed) <p>Note: Nortel strongly recommends that you use a UPS to maintain power to the server and ELAN/Nortel server subnet switch or hubs in the event of a power outage.</p>

Check Description

- ☐ Ensure that jacks and cables are ready for all required connections.
 - ☐ Ensure that any changes that are necessary on the switch to make room for the 201i server or the MGate card (NTRB18CA) are performed before the installation date.

This includes

 - ensuring that two consecutive IPE card slots are available (for the 201i server)
 - ensuring there are enough card slots for the MGate cards
 - moving lines and trunks
 - consolidating TNs
 - ☐ If it has not been done already, obtain the following information:
 - for the CallPilot server
 - unique computer names
 - IP addresses
 - subnet masks (Nortel server subnet and ELAN Subnet)
 - default gateway (Nortel server subnet)
 - direct inward dial (DID) numbers on the switch

Record this information on the following worksheets, as required:

 - “Switch or system configuration worksheet” on page 121
 - “Configuration Wizard worksheet” on page 127
 - ☐ Ensure that the items that are listed on the “Customer-supplied items checklist” on page 106 are provided.
-

Required tools and materials

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

Check	Item
<input type="checkbox"/>	Antistatic ESD wrist strap (recommended)
<input type="checkbox"/>	Various sizes of Phillips cross-head and standard screwdrivers
	Note: If your server is a tower or rackmount server, magnetic screwdrivers are recommended to prevent you from losing the screws inside the server chassis.
	ATTENTION
	To prevent data loss, keep magnetic screwdrivers away from backup tapes, floppy disks, and hard drives.
<input type="checkbox"/>	A set of hex nut drivers
<input type="checkbox"/>	Side cutters
<input type="checkbox"/>	Jumper removal tool or needle-nosed pliers
<input type="checkbox"/>	Tweezers
<input type="checkbox"/>	Tape measure for determining cable lengths
<input type="checkbox"/>	A flashlight for examining the interior of a tower or rackmount server chassis
<input type="checkbox"/>	Pen for writing notes, cable lengths, and cable identifications
<input type="checkbox"/>	Cable tie wraps
<input type="checkbox"/>	Cable identification labels

Check	Item
<input type="checkbox"/>	<p>Equipment log</p> <p>The equipment log is used to record the model and serial number of the system, all installed options, and other information.</p>
<input type="checkbox"/>	<p>Null modem serial cable (it can be useful for troubleshooting)</p>
<input type="checkbox"/>	<p>If the CallPilot server is a 201i server, an external tape drive.</p> <p>The tape drive is required when performing backups or restoring data from backups if you are not backing up to a network drive.</p>
<input type="checkbox"/>	<p>If the CallPilot server is a 1005r, an SLR75 external tape drive</p> <p>The tape drive is required when performing backups or restoring data from backups if you are not backing up to a network drive.</p>
<input type="checkbox"/>	<p>If the CallPilot server is a 201i server, an external CD-ROM drive</p> <p>The external CD-ROM drive is required when installing CallPilot or operating system software.</p>
<input type="checkbox"/>	<p>For any server model, a monitor peripheral kit to access the CallPilot system for maintenance purposes</p>
<input type="checkbox"/>	<p>A computer with a CD/DVD-ROM drive that is separate from the CallPilot server (such as a laptop computer)</p> <p>This is required for reading documentation on CD/DVD-ROM and for connecting to the CallPilot server network for troubleshooting.</p>

Customer-supplied items checklist

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

Check	Item
<input type="checkbox"/>	Secure location for the CallPilot server and peripheral equipment Windows and doors should be kept locked and provide access only to authorized personnel.
<input type="checkbox"/>	External analog phone line for the modem The line should not be connected to the switch. If the switch goes down, the CallPilot server cannot be supported from a remote location.
<input type="checkbox"/>	Web-enabled administrative PC The web-enabled administrative PC should be in close proximity to the CallPilot server, and must have <ul style="list-style-type: none">■ network connectivity to the CallPilot server (it can be on the Nortel server subnet or ELAN Subnet)■ one of the following web browsers installed (for software versions, see the <i>CallPilot Planning and Engineering Guide</i>):<ul style="list-style-type: none">— Internet Explorer— Netscape Communicator■ a CD-ROM drive so that CallPilot documentation can be accessed from CD-ROM■ access to the Internet so that the installation technician can download software updates from Nortel, if required
<input type="checkbox"/>	TCP/IP-based ELAN Subnet that connects the switch and the server (Meridian 1 or Succession 1000 only)

Check Item

- ☐ A layer 2 switch or hub for the ELAN Subnet (or an appropriate alternative), power cord, and, if required, back-up power supply
The ELAN switch or hub is optional. You can use a cross-over network cable to make a direct point-to-point connection from the CallPilot server to the switch. If you want other devices to have connectivity to the ELAN Subnet, use a switch or hub.

ATTENTION

A Class A switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements.

- ☐ Ethernet connections ready at the Meridian 1 or Succession 1000 system (cables and Ethernet transceivers or MAUs)
- ☐ Cable for connecting the ELAN Subnet to the customer WAN (optional)

This allows you or Nortel technical support to connect to the ELAN Subnet from a remote location.

- ☐ TCP/IP-based Nortel server subnet that can connect desktop or web messaging users to the server, if the Desktop Messaging feature has been purchased

This includes any hardware or software to facilitate Nortel server subnet segmentation or multiple-LAN protocols.

- ☐ A hub for the Nortel server subnet or an appropriate alternative

ATTENTION

A Class A switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements.

- ☐ Jacks and a cable for connecting the CallPilot server to the Nortel server subnet (optional)

Check	Item
<input type="checkbox"/>	<p data-bbox="283 229 490 256">Web server PC, if</p> <ul style="list-style-type: none"> <li data-bbox="292 276 1034 336">■ CallPilot Manager and CallPilot Reporter will be installed on a stand-alone server <p data-bbox="321 355 1028 523">CallPilot Manager is the web-based software that you use to administer the CallPilot server. CallPilot Manager must be installed on a stand-alone web server if you want to use CallPilot Reporter. You cannot install CallPilot Reporter on the CallPilot server.</p> <ul style="list-style-type: none"> <li data-bbox="292 542 852 569">■ My CallPilot will be used by mailbox owners <p data-bbox="321 588 1001 683">My CallPilot is a web-based portal that provides access to CallPilot messages and mailbox configuration over the Internet.</p> <p data-bbox="321 702 975 762">My CallPilot can be installed on the same web server as CallPilot Manager.</p> <p data-bbox="283 782 972 882">For information about the web server PC requirements for CallPilot Manager and My CallPilot, refer to the following sections in the <i>CallPilot Software Administration</i> guide:</p> <ul style="list-style-type: none"> <li data-bbox="292 901 1034 962">■ “Installing CallPilot administrative software on a stand-alone web server” <li data-bbox="292 981 904 1008">■ “Installing Desktop Messaging and My CallPilot”

CallPilot server hardware checklist

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

Check	Item
Tower or rackmount server and peripheral devices	
<input type="checkbox"/>	Keycode printed on a label that lists the purchased features
<input type="checkbox"/>	Tower or rackmount CallPilot server
	The server contains the following items, which are already installed:
	<ul style="list-style-type: none">■ CD/DVD-ROM drive■ hard drives■ network interface cards■ One or more MPB boards (MPB96)
<input type="checkbox"/>	Keyboard and mouse
<input type="checkbox"/>	SVGA 14-in. monitor
<input type="checkbox"/>	Modem with cable and power cord (for remote access)
<input type="checkbox"/>	Ethernet hubs, if purchased from Nortel

Check	Item
-------	------

201i server and peripheral devices	
---	--

<input type="checkbox"/>	Keycode printed on a label that lists the purchased features
--------------------------	--

<input type="checkbox"/>	201i server
--------------------------	-------------

<input type="checkbox"/>	Multi I/O cable (NTRH0912)
--------------------------	----------------------------

<input type="checkbox"/>	EMC kit (NTRH3503)
--------------------------	--------------------

Note: The EMC kit is required for Option 11C Mini and Succession 1000 systems only.

<input type="checkbox"/>	Backplane (tip and ring) cable (NTRH3501)
--------------------------	---

Note: This cable is required for Meridian 1 Option 51C–Option 81C systems only.

<input type="checkbox"/>	One of the following groups of SCSI cables:
--------------------------	---

<input type="checkbox"/>	For Meridian 1 Option 51C–Option 81C:
--------------------------	---------------------------------------

<input type="checkbox"/>	For Meridian 1 Option 51C–Option 81C:
	— NTRH1408

<input type="checkbox"/>	For Meridian 1 Option 51C–Option 81C:
	— NTRH1410

<input type="checkbox"/>	For Meridian 1 Option 51C–Option 81C:
	— NTRH3502

<input type="checkbox"/>	For Option 11C:
--------------------------	-----------------

<input type="checkbox"/>	For Option 11C:
	— NTRH1407

<input type="checkbox"/>	For Option 11C:
	— NTRH3502

<input type="checkbox"/>	For Option 11C Mini or Succession 1000: NTRH3502 (two cables are required)
--------------------------	--

Note: An NTRH3502 cable is supplied with each external SCSI CD-ROM or tape drive.

<input type="checkbox"/>	MPC-8 cards to provide the number of channels purchased for CallPilot
--------------------------	---

Check	Item
-------	------

<input type="checkbox"/>	SVGA 14-in. monitor
--------------------------	---------------------

<input type="checkbox"/>	Keyboard and mouse
--------------------------	--------------------

Note: If you are using a USB mouse, ensure that you also have a USB-to-PS/2 converter and a PS/2 extension cable (A0855616).

<input type="checkbox"/>	Modem with cables and power cord (for remote access)
--------------------------	--

<input type="checkbox"/>	Ethernet hubs, if purchased from Nortel
--------------------------	---

<input type="checkbox"/>	External CD-ROM drive with NTRH3502 SCSI and power cables
--------------------------	---

<input type="checkbox"/>	External tape drive with SCSI and power cables
--------------------------	--

Meridian 1 or Succession 1000 connectivity items—rackmount server only

<input type="checkbox"/>	MGate card(s) (NTRB18CA)
--------------------------	--------------------------

<input type="checkbox"/>	The following MGate cables, as required:
--------------------------	--

- Triple DS30XV connect cable (NTRH2014) (for connection to MPB96 boards only)

Note: For more details about the MGate card cabling requirements, refer to the *<switch_model> and CallPilot Server Configuration* guide for your switch and server.

SL-100, DMS-100 connectivity items—rackmount platforms only

<input type="checkbox"/>	Dialogic D/480JCT-2T1 board(s)
--------------------------	--------------------------------

<input type="checkbox"/>	T1 cable(s)
--------------------------	-------------

<input type="checkbox"/>	T1 card(s)
--------------------------	------------

Check	Item
<input type="checkbox"/>	SMDI link modem connection equipment (if the switch has an IOC shelf and is more than 15.2 m or 50 ft from the server)
<input type="checkbox"/>	Long-haul modems (two modems)
<input type="checkbox"/>	Modem cable for connection to CallPilot
<input type="checkbox"/>	IOC cable

Note: A cable is also required to connect the two modems. Pinout information for this cable is provided in the *<switch model> and CallPilot Server Configuration* guide for your switch and server. This cable is created or supplied by the customer or installer.

Check	Item
<input type="checkbox"/>	<p>SMDI link modem connection equipment (if the switch has an IOM and is more than 229 m or 750 ft from the server)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Long-haul modems (2 modems) <input type="checkbox"/> Modem cable for connection to CallPilot <input type="checkbox"/> IOM cable <input type="checkbox"/> Smart connector <p>Note: A cable is also required to connect the two modems. Pinout information for this cable is provided in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server. This cable is created or supplied by the customer or installer.</p>
<input type="checkbox"/>	<p>SMDI Link Direct Connection equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> DB-9 (F) to DB-25 (F) Null Modem cable <input type="checkbox"/> IOC cable
<input type="checkbox"/>	<p>SMDI Link Direct Connection equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> DB-9 (F) to DB-25 (M) Null Modem cable <input type="checkbox"/> IOM cable <input type="checkbox"/> Smart Connector

CallPilot hardware and documentation spares checklist

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

Check	Item	Quantity
<input type="checkbox"/>	MPB96 board or MPB16-4 board	1
<input type="checkbox"/>	MPC-8 cards (for the 201i server)	4
<input type="checkbox"/>	201i server hard drive	1
<input type="checkbox"/>	703t server hard drive	1
<input type="checkbox"/>	1002rp server hard drive	1
<input type="checkbox"/>	1005r server hard drive	1
<input type="checkbox"/>	Network hub	1
<input type="checkbox"/>	Network cable	1
<input type="checkbox"/>	All CallPilot server software CD-ROMs For a complete list, see “CallPilot software media and documentation checklist” on page 115.	1 of each CD-ROM
<input type="checkbox"/>	CallPilot image DVD (1005r only)	1

CallPilot software media and documentation checklist

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

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

Check	Item
<input type="checkbox"/>	CallPilot Image (3 CD-ROMs)—contain an image of the CallPilot software. Note: CallPilot CD-ROM disk images are platform dependant. A different image of the operating system and CallPilot software is required for each platform (201i, 703t, 1002rp.). Note: The 1005r CallPilot image is contained on 1 DVD.
<input type="checkbox"/>	CallPilot Service Update/PEP CD-ROM: <ul style="list-style-type: none">■ Service Updates and PEPs

Check	Item
<input type="checkbox"/>	CallPilot Application CD — contains applications that can be reinstalled. <ul style="list-style-type: none">■ CallPilot server software■ CallPilot Manager and Reporter■ CallPilot Application Builder■ pcAnywhere■ Adobe Acrobat Reader■ DirSync■ Java2RunTimeEnv
<input type="checkbox"/>	CallPilot Desktop Client software
<input type="checkbox"/>	CallPilot My CallPilot web-based software (provides mailbox access for end users)
<input type="checkbox"/>	CallPilot language prompts on a set of 3 CD-ROMs. <ul style="list-style-type: none">■ Americas language prompts■ EMEA language prompts■ Asia-Pacific language prompts
<input type="checkbox"/>	CallPilot Documentation CD-ROM
<input type="checkbox"/>	The following printed CallPilot documentation: <ul style="list-style-type: none"><input type="checkbox"/> <i>CallPilot Distributor Technical Reference (DTR)</i> <p>Note: You can obtain other CallPilot documentation from the CallPilot Documentation CD/DVD-ROM, or from the Installation and Administration Help area in CallPilot Manager. See “Related information” on page 18 for more details about the available documents.</p>

Preinstalled software

What is installed at the factory

The factory installs the operating system and CallPilot server software and third-party applications such as pcAnywhere prior to shipping the server. A disk image of this software is also shipped with the system. See “CallPilot software media and documentation checklist” on page 115).

For version numbers of the software applicable to your installation, see the *CallPilot Planning and Engineering Guide*.

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

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

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

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

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

Cautions



CAUTION

Risk of system interruption or malfunction

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

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



CAUTION

Risk of reduced system performance

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

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

Appendix B

Configuration worksheets

In this chapter

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Switch or system configuration worksheet	121
Configuration Wizard worksheet	127

ATTENTION

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

Overview

Introduction

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

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

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

Where to get the information

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

When to use the worksheets

Use the configuration worksheets in these situations:

- when you install the server
- each time configuration changes are required as part of an upgrade, migration, or reinstallation

Switch or system configuration worksheet

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

switch or system type

<input type="checkbox"/> Meridian 1 <input type="checkbox"/> Option 51C, 61C, 81, 81C <input type="checkbox"/> Option 11 or Option 11C Mini	See “Meridian 1 or Succession 1000 information” on page 122
<input type="checkbox"/> Succession 1000	
<input type="checkbox"/> SL-100, DMS-100	See “SL-100/DMS-100 switch information” on page 125

Meridian 1 or Succession 1000 information

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

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

ACD queue and agents (Overlays 11 and 23)	
ACD DN of CallPilot agents (Overlay 23):	_____
Agent TNs (Overlay 11):	_____
Position ID on Key0:	_____
SCN on Key1:	_____
Default ACD DN for CDN (Overlay 23):	_____

CDN queues (Overlay 23)

Primary CDN (Voice Messaging): _____

Secondary CDN (Multimedia Messaging): _____

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

CallPilot application name: _____

Superloop (Overlay 97): _____

Phantom DN (Overlay 10): _____

DCFW CDN: _____

CallPilot application name: _____

Superloop (Overlay 97): _____

Phantom DN (Overlay 10): _____

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

DCFW CDN: _____

CallPilot application name: _____

Superloop (Overlay 97): _____

Phantom DN (Overlay 10): _____

DCFW CDN: _____

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

CallPilot application name: _____

ACD DN: _____

NCFW CDN: _____

CallPilot application name: _____

ACD DN: _____

NCFW CDN: _____

CallPilot application name: _____

ACD DN: _____

NCFW CDN: _____

SL-100/DMS-100 switch information

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

UCD DN for voice messaging:	_____
UCD DN for multimedia messaging (if purchased):	_____
UCD DN for speech recognition (if purchased):	_____
Channel configuration	
UCD DN:	_____
DN of agent:	_____
Message Desk Number:	_____
Terminal Number:	_____
Login Code:	_____
Logout Code:	_____
Service DN:	_____
Associated application:	_____

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

Configuration Wizard worksheet

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

Worksheet sections

The Configuration Wizard worksheet contains the following sections:

- “CallPilot information,” on page 128
- “Operating system password,” on page 129
- “pcAnywhere password,” on page 129
- “Multimedia allocation,” on page 130
- “Application DN information,” on page 130
- “Languages,” on page 131
- “CallPilot network information,” on page 131
- “Customer LAN access information,” on page 132
- “Meridian 1 or Succession 1000 information,” on page 133
- “T1/SMDI information,” on page 135

CallPilot information

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

Operating system password

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

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

Password type	Current Password	New Password
Administrator	default: Bvw250	
NGenSys	default: Bvw250	
NGenDist	default: Bvw250	
NGenDesign	default: Bvw250	

pcAnywhere password

Password type	New Password
CallPilotDist	

For more information on changing the pcAnywhere password see:

- Step “4 Change the CallPilotDist password for pcAnywhere (note: pcAnywhere is not used with the 201i).” on page 30
- the section “Changing pcAnywhere passwords” in the *<switch_model> and CallPilot Server Configuration* guide for your switch and server

Multimedia allocation

DSP Encoding:	<input type="checkbox"/> A-law (Europe or Caribbean)
	<input type="checkbox"/> Mu-law (North America)

Application DN information

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

Languages

Record the languages you need.	
Primary prompt language:	_____
Secondary prompt language:	_____
Other languages:	_____ _____ _____ _____
Automated Speech Recognition languages:	_____ _____ _____

CallPilot network information

Embedded LAN TCP/IP Information (Meridian 1 and Succession 100 only)	
MAC address of ELAN network card on the CallPilot server (tower or rackmount servers only):	_____
CallPilot server ELAN IP address:	_____ . _____ . _____ . _____
Subnet mask:	_____ . _____ . _____ . _____

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

Customer LAN access information

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

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

Meridian 1 or Succession 1000 information

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

Switch information	
Switch IP address:	_____ . _____ . _____ . _____
Switch type:	<input type="checkbox"/> Meridian 1 <input type="checkbox"/> Option 11 or Option 11C Mini <input type="checkbox"/> Succession 1000
Switch customer number:	_____

Symposium Call Center Server CLAN IP Address:	
_____ . _____ . _____ . _____	
Symposium Call Center Server voice application Class ID:	

Note: The Symposium Call Center Server server CLAN IP address and voice application class ID are required only if you will be using the Symposium Voice Services Support feature.	

TN information	
Note: Copy the relevant information from the “Switch or system configuration worksheet” on page 121.	
Number of TNs:	_____
Dedicated to:	<input type="checkbox"/> ACCESS ACD queue <input type="checkbox"/> IVR* ACD queue

Note: Check one of these options if this group of TNs is dedicated to the Symposium Voice Services Support feature.	
Start TN:	_____
Start TN Key 0 (Position ID):	_____
Start TN Key 1 (SCN):	_____

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

Note: Copy the relevant information from the “Switch or system configuration worksheet” on page 121.

Number of TNs: _____

Dedicated to: ☐ ACCESS ACD queue
☐ IVR ACD queue

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

Start TN: _____

Start TN Key 0 (Position ID): _____

Start TN Key 1 (SCN): _____

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

Note: Copy the relevant information from the “Switch or system configuration worksheet” on page 121.

Number of TNs: _____

Dedicated to: ☐ ACCESS ACD queue
☐ IVR ACD queue

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

Start TN: _____

Start TN Key 0 (Position ID): _____

Start TN Key 1 (SCN): _____

T1/SMDI information

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

Switch information

SMDI Transport Data Settings	
Poll Timeout (Default: 10 000 ms):	_____
Poll Timeout Threshold (Default: 5):	_____
Poll DN (Default: 0):	_____
MWI Padding (Default: blank):	_____
COM Port Settings	
Port Name	COM 2
Port Use type (Default: MM Access):	_____
Baud Rate (Default: 9600):	_____
Parity (Default: Even):	_____
Number of Data Bits (Default: 7):	_____
Number of Stop Bits (Default: 1):	_____
Flow Control (Default: None):	_____

T1 Board Properties	
Line Interface Type (Default: Ground Start):	_____
Frame Format:	Only D4 is supported.
Coding Format:	Only B8ZS is supported.
(T1) Cable Length (Default: None):	_____
Debounce Value (Default: 13):	_____
Hook Flash Time (Default: 50):	_____
Note: Debounce Value and Hook Flash Time units indicate 10X ms. Example: “13” indicates “130 ms.”	

Channel Detail Information

UCD group for Voice channels, if Voice channels were purchased	
Number of Channels (in this UCD group):	_____
Agent DN (starting):	_____
Hunt Group DN (UCD DN):	_____
Message Desk Number:	_____
Message Terminal Number (starting):	_____
Login Code:	_____
Logout Code:	_____

UCD group for Fax channels, if Fax channels were purchased	
Number of Channels (in this UCD group):	_____
Agent DN (starting):	_____
Hunt Group DN (UCD DN):	_____
Message Desk Number:	_____
Message Terminal Number (starting):	_____
Login Code:	_____
Logout Code:	_____

UCD group for Speech Recognition channels, if Speech Recognition channels were purchased	
Number of Channels (in this UCD group):	_____
Agent DN (starting):	_____
Hunt Group DN (UCD DN):	_____
Message Desk Number:	_____
Message Terminal Number (starting):	_____
Login Code:	_____
Logout Code:	_____

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Installation and Configuration Task List

CallPilot

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