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CallPilot

Installation and Configuration Task List

Product release 3.0 Standard 1.0 November 2004

NORTEL NETWORKS™

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CallPilot

Installation and Configuration Task List

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April 2004	Release 2.5, Standard 2.0; MCS 5100 information added to checklists and worksheets
October 2003	Release 2.5, Standard 1.0 of *CallPilot Installation and Configuration, Part 1: Installation and Maintenance Overview*; overview procedures modified (addition of Intel board install step and single point grounding info); EMC warning for the 1002rp server in the Site inspection checklist and customer-supplied items checklist; settings for the DSE and SL-100/DMS-100 on worksheet
October 2002	Standard 1.0 of *CallPilot Installation and Configuration, Part 1: Installation and Maintenance Overview* is released for CallPilot 2.0 general availability.

November 2000

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

May 2000

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

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Chapter 1

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 done during the initial installation of the system or after a system is installed.

Installing a new system

For a new CallPilot installation, start at Chapter 2, "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 7, "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 Fundamentalist 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 12.

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.

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CallPilot Customer Documentation Map

NTP Number 555-7101-(nnn)

- **Fundamentals**
  - CallPilot Fundamentals (-010)
- **Planning and Engineering**
  - Planning and Engineering Guide (-101)
  - Network Planning Guide (-102)
  - Data Networking for Voice over IP (553-3001-160)
- **Installation and Configuration**
  - Installation and Configuration Task List (-210)
  - **Server Installation Guides**
    - 201i Server Hardware Installation (-220)
    - 703t Server Hardware Installation (-226)
    - 1002rp Server Hardware Installation (-205)
  - **Configuration and Testing Guides**
    - Meridian 1 and CallPilot Server Configuration (-222)
    - Succession 1000 System and CallPilot Server Configuration (-510)
  - **Unified Messaging Software Installation**
    - Desktop Messaging and MyCallPilot Installation Guide (-505)
- **Administration**
  - Administrator's Guide (-301)
  - Software Administration and Maintenance Guide (-202)
  - Desktop Messaging and MyCallPilot Administration Guide (-503)
  - Meridian Mail to CallPilot Migration Guide (-801)
  - Application Builder Guide (-325)
  - Reporter Guide (-310)
- **Maintenance**
  - Troubleshooting Guide (-501)
  - **Server Maintenance and Diagnostics**
    - 201i Server Maintenance and Diagnostics (-119)
    - 703t Server Maintenance and Diagnostics (-227)
    - 1002rp Server Maintenance and Diagnostics (-206)
- **End User Information**

End User Cards	End User Guides
Unified Messaging Quick Reference Card	Multimedia Messaging User Guide
Unified Messaging Wallet Card	Speech Activated Messaging User Guide
Command Comparison Card A-Style	Desktop Messaging User Guide for Microsoft Outlook
Command Comparison S-Style	Desktop Messaging User Guide for Lotus Notes
Menu Interface Quick Reference Card	Desktop Messaging User Guide for Novell Groupwise
Alternate Command Interface Quick Reference Card	Desktop Messaging User Guide for Internet Clients
	MyCallPilot User Guide

Chapter 2

Installing a new CallPilot server

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Connecting the switch to the CallPilot server 21

Configuring the switch and CallPilot server 22

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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 Networks is not supported, and can cause CallPilot to malfunction.

For information on non-CallPilot software supported by Nortel Networks, 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 9, “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 *Merdian 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 88.	5 minutes, if the site meets all of the requirements	❒
2	Ensure that you have the information and tools required to install the hardware: ■ Obtain the necessary network configuration information from the customer's network administrator. ■ Gather the necessary equipment, tools, and materials and complete the checklists: ■ "Required tools and materials" on page 92 ■ "Customer-supplied items checklist" on page 94	10 minutes, if you have all of the items you need	❒

Step	Description	Time required	Check
3	Unpack the server and supplied equipment, software, and documentation. Verify the items received against the Nortel Networks 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. Complete the following checklists to ensure that you have all components ordered: ■ "CallPilot server hardware checklist" on page 97 ■ "CallPilot software media and documentation checklist" on page 103	30 minutes	❒
4	Inspect the server. Report any damage or missing components to Nortel Networks.	10–30 minutes (based on your server model)	❒
5	For tower or rackmount servers, review the slot and IRQ assignment information provided in the *CallPilot <Server model> Server Hardware Installation* guide for your server. You need slot assignment information later in the installation. You may need the IRQ information for troubleshooting if you experience problems with the server.	10 minutes	❒

Step	Description	Time required	Check
6	Review the "Network connectivity" section in the *CallPilot <Server model> Server Hardware Installation* guide for your server. This section provides an overview of how the CallPilot server is connected to the customer network.	5 minutes	❒
7	If not already completed, fill out the configuration worksheets in Appendix B, "Configuration worksheets.": ■ the "Switch or system configuration worksheet" on page 109 ■ the CallPilot server "Configuration Wizard worksheet" on page 113	20 minutes, if you have all of the information you need	❒

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	❒
2	If the 19-inch rack is not already installed, install it now. For instructions, refer to the rack documentation. **ATTENTION** If applicable, ensure that the rack meets seismic bracing requirements. For more information, refer to the documentation for your switch or system.	Based on rack, location, and connections: 1 to 4.5 hours	❒
3	Place the server hardware and peripheral devices in the location chosen for the server.	5 minutes, if you unpacked the items in the chosen location	❒

Step	Description	Time required	Check
4	Connect peripheral devices to the server. Peripheral devices include the following items, based on your server platform: ■ external modem for remote access ■ ELAN switch (layer 2) or hub (Meridian 1 or Succession Communication Server for Enterprise 1000 only) ■ Nortel Networks Server Subnet (NNS; also known as CLAN) switch or hub (optional) **Note:** When connecting the optional NNS Subnet, do not power up unless your anti-virus programs and Nortel Networks security updates are installed first. ■ external tape and CD-ROM drives (201i server only) ■ monitor, keyboard, and mouse ■ software feature key adapter (tower and rackmount platforms only)	30 minutes	❒
5	Power up the server.	Based on your server model	❒

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. ■ 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	❒
2	Connect the CallPilot server to the switch as described in the <*switch model*> *and CallPilot Server Configuration* guide for your switch and server.	15 minutes	❒

Configuring the switch and CallPilot server

Step	Description	Time required	Check
1	Configure the switch. For switch configuration information, refer to the "Switch or system configuration worksheet" on page 109 provided in the Appendix B, "Configuration worksheets." For instructions, refer to configuring the switch or system in the *<switch model> and CallPilot Server Configuration* guide for your switch and server.	30 minutes	❒
2	For T1/SMDI installations only: Install and configure the Intel board software, if required for your switch and server (for example, in T1/SMDI installations). For instructions, refer to installing and configuring Intel board software in the *<switch model> and CallPilot Server Configuration* guide for your switch and server.	10 minutes	❒

Step	Description	Time required	Check
3	Use CallPilot Manager to log on to the server. Run the Configuration Wizard to configure the CallPilot server and change the operating system passwords. For server configuration information, refer to the "Configuration Wizard worksheet" on page 113 provided in the Appendix B, "Configuration worksheets." For logon and configuration instructions, refer to: ■ configuring CallPilot server software in the <*switch model*> *and CallPilot Server Configuration* guide for your switch and server ■ online Help for the Configuration Wizard	20 minutes, plus up to 1 hour to apply the changes	❒
4	Restart the server and ensure that it can start CallPilot. For instructions, see "Restarting the server" on page 59.	Based on your server model; at least 10 minutes	❒
5	Change the CallPilotDist password for pcAnywhere. **Note:** Record the new password on the Configuration Wizard worksheet, "pcAnywhere password," on page 115. For information on changing the pcAnywhere password, see the <*switch model*> *and CallPilot Server Configuration* guide for your switch and server.	5 minutes	❒

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	❒
2	Test the connection to the ELAN Subnet, if applicable.	1 minute, if the ping is successful	❒
3	Test the connection to the Nortel Networks Server Subnet (NNS; also known as CLAN) switch or hub.	1 minute, if the ping is successful	❒
4	Verify that CallPilot answers when you dial the Voice Messaging DN.	5–10 minutes, if the test is successful	❒
5	Verify network connectivity to the CallPilot server by using a web browser to log on to the CallPilot server.	5 minutes	❒
6	Verify that you can leave a message. **Note:** This task includes the first-time configuration of a Voice Messaging DN and test mailbox.	25 minutes	❒
7	Verify that you can retrieve a message.	2 minutes	❒

Step	Description	Approximate time required	Check
8	Verify that each call channel and multimedia channel is functioning correctly.	2 hours	❒

Other administrative tasks

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

Step	Description	Time required	Check
3	Install pcAnywhere on the standalone web server and a remote PC, and configure remote administrations. **Note:** Nortel Networks requires pcAnywhere (supplied by the customer) for remote support.		
4	If purchased by the customer, install either or both: ■ Desktop Meessaging on the CallPilot server or standalone web server ■ My CallPilot on users' personal computers. For instructions, see "Desktop messaging and My CallPilot installation tasks," on page 28.		

Desktop messaging and My CallPilot installation tasks

Task	Reference
1 Review and understand ■ the installation process ■ desktop messaging requirements ■ My CallPilot requirements	*Desktop Messaging and My CallPilot Installation Guide*
2 Complete the Pre-installation checklist.	*Desktop Messaging and My CallPilot Installation Guide*, "Desktop messaging and My CallPilot pre-installation checklist"
3 Configure the CallPilot server to support desktop messaging and My CallPilot.	The completed "Desktop messaging and My CallPilot pre-installation checklist"
4 Install or upgrade the desktop messaging software on users' personal computers.	*Desktop Messaging and My CallPilot Installation Guide*, "Installing desktop messaging"
5 Install the My CallPilot software.	*Desktop Messaging and My CallPilot Installation Guide*, "Installing My CallPilot"

Chapter 3

Expanding CallPilot server features

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 Networks.

Feature expansion checklist

Step	Description	Time required	Check
1	Compare the current CallPilot system configuration with the expansion keycode label, and ensure that ■ the serial number matches ■ the feature limits on the keycode label are equal to or greater than the limits on the CallPilot server If the information on the keycode does not match the system configuration, the expansion may not succeed.	5 minutes	❒
2	Install additional hardware, if required. **Note:** Your system may require additional switch programming with the new hardware. If your CallPilot expansion includes an increase in system capacity, you may need to ■ install more line cards on the switch (tower and rackmount platforms only). For instructions, refer to the CallPilot configuration guide for your switch and server. ■ perform a platform migration For instructions, refer to the *CallPilot Software Administration Guide*. ■ install more voice processing boards (tower and rackmount platforms only) or MPC-8 cards. For instructions, refer to the *s*erver maintenance and diagnostics guide for your server.	30 minutes to 1 hour	❒

Step	Description	Time required	Check
3	Log on to the server, and then run the Configuration Wizard. For logon and configuration instructions, refer to the following: ■ "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	❒
4	Restart the server and ensure that CallPilot can start.	Based on your server model; at least 10 minutes	❒
5	Ensure that CallPilot can receive calls. For instructions, refer to "Verifying that CallPilot can receive calls" in the CallPilot configuration guide for your switch and server.	5 minutes	❒
6	Ensure that all call and multimedia channels and features work as expected. This includes sending a fax, logging in to the mailbox using Speech Activated Messaging, using the phone set to read e-mail, verifying that desktop messaging works, and using Reporter to generate the relevant reports. For instructions, refer to the section on testing the CallPilot software and channels in the CallPilot configuration guide for your switch and server.	2 hours	❒

Step	Description	Time required	Check
7	Create a backup of the CallPilot system. For instructions on performing the backup, refer to “Backing up and restoring CallPilot information” in the *CallPilot Administrator’s Guide* (555-7101-301). **ATTENTION** Nortel Networks recommends that the backup also be stored in a safe location off-site.	Based on server model; up to 3 hours	❒

Chapter 4

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

ATTENTION

Read all instructions before attempting to perform a platform migration. Only technicians familiar with CallPilot should attempt this procedure.

Offsite planning tasks

Task	Reference
1 Ensure that your planned platform migration path is supported.	*CallPilot Software Administration and Maintenance* guide, “Platform migration requirements”
2 Become familiar with all platform migration constraints and requirements.	*CallPilot Software Administration and Maintenance* guide, “Platform migration overview”
3 As you review the migration stages, use the estimated times provided to calculate the time it may take to complete the process.	*CallPilot Software Administration and Maintenance* guide, “Platform migration overview”

Onsite installation and configuration tasks

Task	Reference	Time required
1 Ensure that both servers are running identical software versions.	*CallPilot Software Administration and Maintenance* guide, "Platform migration overview," "Stage 1: Ensure that both servers are running identical software versions"	up to 20 minutes
2 Back up the original server.	*CallPilot Software Administration and Maintenance* guide, "Platform migration overview," "Stage 3: Back up the original server"	varies by platform
3 Prepare the target server.	*CallPilot Software Administration and Maintenance* guide, "Platform migration overview," "Stage 4: Prepare the target server"	about 2.5 hours
4 Restore and configure the target server.	*CallPilot Software Administration and Maintenance* guide, "Platform migration overview," "Stage 5: Restore and configure the target server"	2.5 to 5.5 hours
5 Bring the target server into service.	*CallPilot Software Administration and Maintenance* guide, "Platform migration overview," "Stage 6: Bring the target server into service"	30 minutes
6 Expand the CallPilot features	*CallPilot Software Administration and Maintenance* guide, "Expanding features"	

Task	Reference	Time required
7 Perform onsite operation tests.	"Onsite testing tasks" on page 51 of this document	
8 Perform a full system backup.	*CallPilot Administrator's Guide*, Chapter 8, "Backing up and restoring CallPilot information"	

Chapter 5

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.

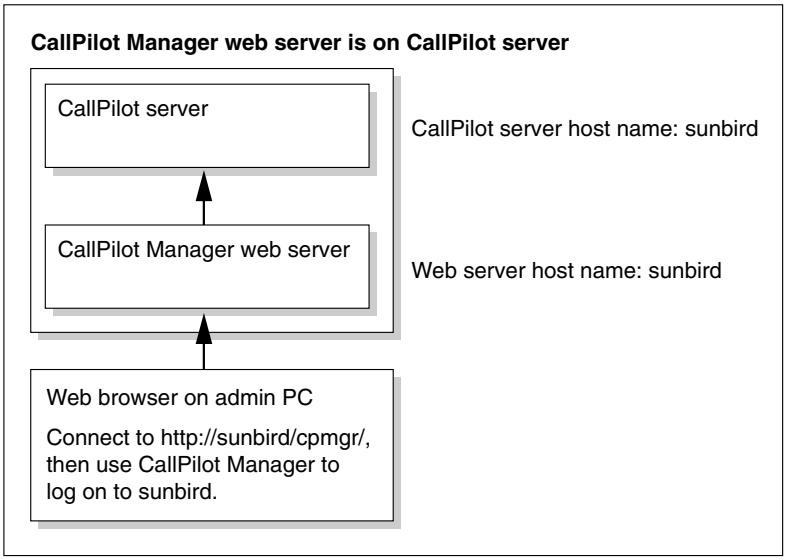
   The URL syntax is http://<web server host name or IP address>/cpmgr/.

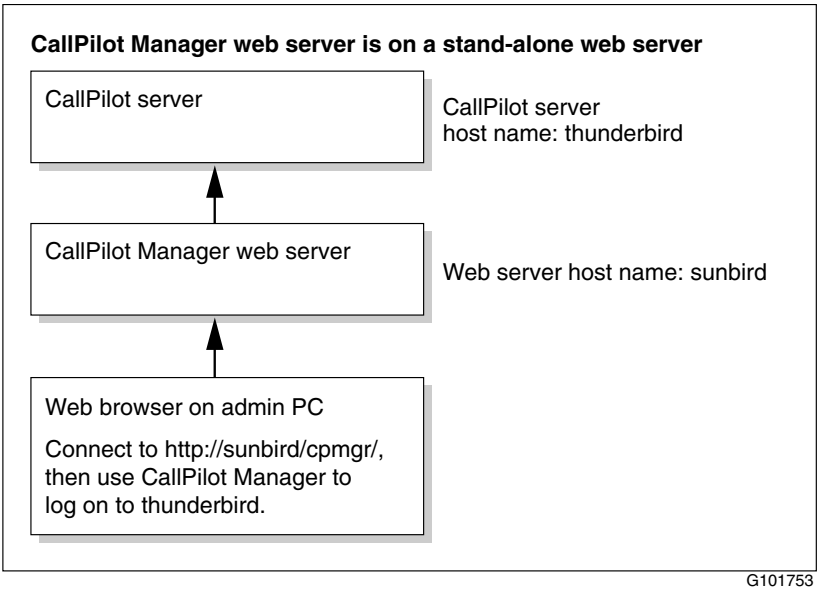
2. Log on to the CallPilot server with an administrator mailbox number and password.

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:


CallPilot Manager web server is on CallPilot server
CallPilot server
CallPilot server host name: sunbird
CallPilot Manager web server
Web server host name: sunbird
Web browser on admin PC
Connect to http://sunbird/cpmgr/, then use CallPilot Manager to log on to sunbird.
G101752

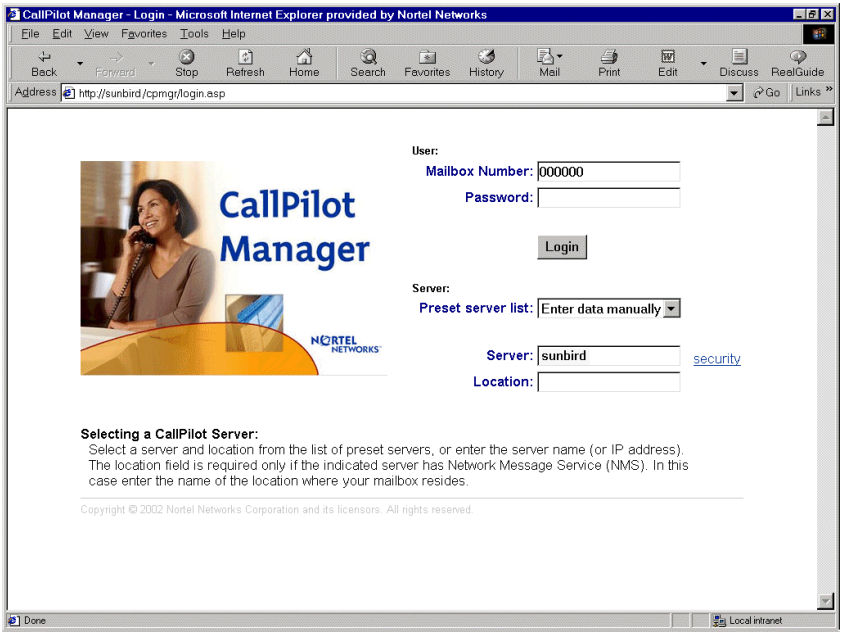

CallPilot Manager web server is on a stand-alone web server
CallPilot server
CallPilot server host name: thunderbird
CallPilot Manager web server
Web server host name: sunbird
Web browser on admin PC
Connect to http://sunbird/cpmgr/, then use CallPilot Manager to log on to thunderbird.
G101753

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.

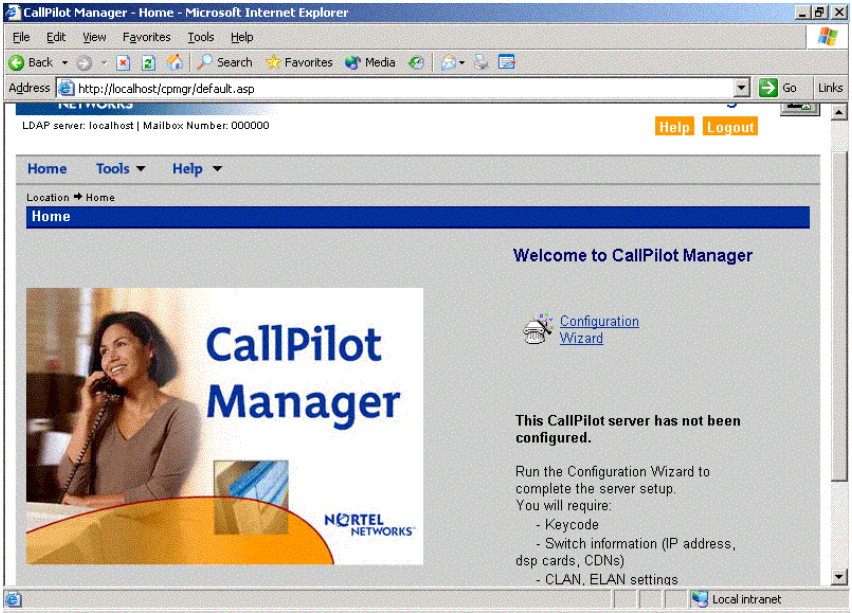
- administrator mailbox number (default): **000000**
- administrator mailbox password (default): **124578**.

3 Do one of the following:

- Choose a server or location from the list of pre-configured 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.



Onsite 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 messaging service defaults" → "Changing messaging defaults"
5 If purchased by the customer: Configure CallPilot networking.	CallPilot Manager online Help topic "Creating 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 messaging service defaults" → "Customizing system prompts"
9 If purchased by the customer: Configure fax services.	"Fax services configuration tasks" on page 47 of this document
10 If purchased by the customer: Configure speech activated messaging services.	"Speech activated messaging service configuration tasks" on page 48 of this document
11 If purchased by the customer: Configure E-mail by Phone options.	"E-mail By Phone configuration tasks" on page 49 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.	■ CallPilot Manager online Help topic "Administering mailboxes" → "Adding and removing mailboxes" ■ CallPilot Manager online Help topic "Securing the CallPilot system" → "Configuring mailbox security"
5 Add custom applications (including voice menus).	■ CallPilot Manager online Help topic "Configuring CallPilot services" ■ *CallPilot Application Builder Guide* ■ CallPilot Application Builder online Help topics

Task	Reference
6 Set up basic reports to monitor the system. **Note:** This requires CallPilot Manager and Reporter be installed on a standalone web server.	■ CallPilot Manager online Help topic "Monitoring the CallPilot system" → "Running system status reports" ■ *CallPilot Reporter Guide*
7 Add remaining mailbox owners and shared distribution lists (SDLs).	CallPilot Manager online Help topic "Administering mailboxes" → "Adding and removing mailboxes" → "Adding a group of mailboxes in a single operation"

Desktop messaging and My CallPilot configuration tasks

Task	Reference
1 Configure mailbox classes to enable mailbox owners to access desktop messaging and My CallPilot.	CallPilot Manager online Help topic "Managing mailbox creation and privileges" → "Using mailbox classes to manage mailbox privileges" → "Permitting use of optional unified messaging components" →"Using mailbox classes to manage mailbox privileges"
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.	*CallPilot Desktop Messaging and My CallPilot Administration and Maintenance Guide*, "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 49 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 voice menus and features"
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 receive and print faxes"
5 Configure fax general delivery and fax overflow mailboxes.	CallPilot Manager online Help topic "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" → "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 → Managing external e-mail servers → "Adding and removing external e-mail servers"
2 Define E-mail-by-Phone options.	CallPilot Manager online Help → Desktop messaging and My CallPilot → Managing external e-mail servers → "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 6

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.	*<switch model> and CallPilot Server Configuration* guide for your switch and server, "Testing the CallPilot installation" Also, refer back to "Testing CallPilot connectivity, services, and channels," on page 24 in this task list guide for an overview of configuration testing done during installation.
2 Add test mailboxes.	CallPilot Manager online Help topic "Administering mailboxes" → "Adding and removing mailboxes" → "Adding individual mailboxes, one at a time"
3 Verify that you can log on to the mailbox.	*<switch model> and CallPilot Server Configuration* 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 or mailbox owners"
5 *If pcAnywhere was installed on a remote computer:* Test remote administration of the CallPilot server.	*CallPilot Administrator's Guide,* "Configuring remote administration of the CallPilot server"
6 *If Reporter is installed:* Test the Reporter link and set up monitoring and reports.	■ *CallPilot Administrator's Guide*, "Learning about CallPilot features" ■ *CallPilot Reporter Guide*
7 *If Application Builder is installed:* Test the Application Builder link and ensure the availability of existing custom applications.	■ *CallPilot Administrator's Guide*, "Understanding CallPilot features and services" ■ *CallPilot Application Builder Guide*

Chapter 7

Starting up and shutting down the CallPilot server

In this chapter

Stopping and starting channels 54

Restarting the server 59

Powering down the server 63

Powering up the server 68

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

To courtesy down 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

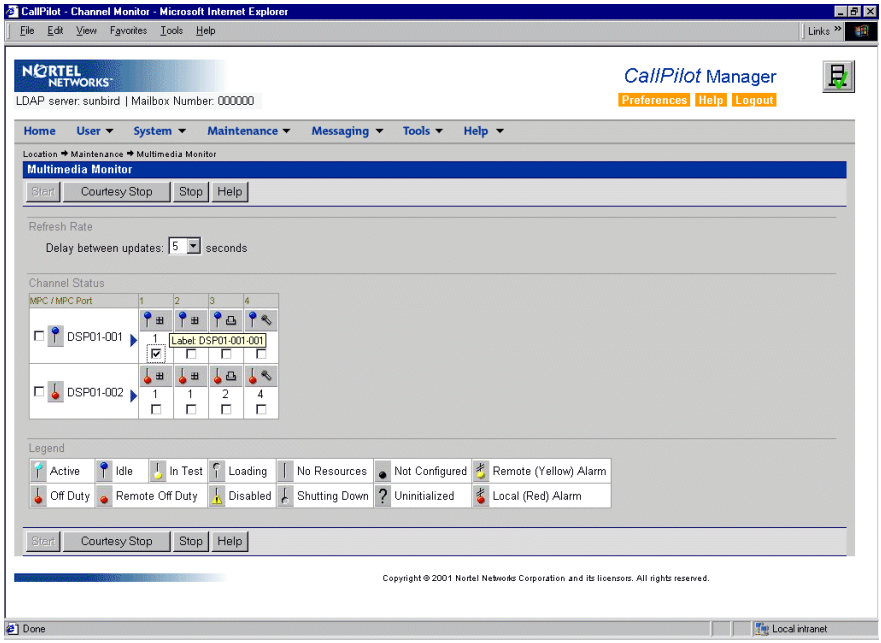
To stop or start channels

1 Log on to the CallPilot server with CallPilot Manager.

For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 38.

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.

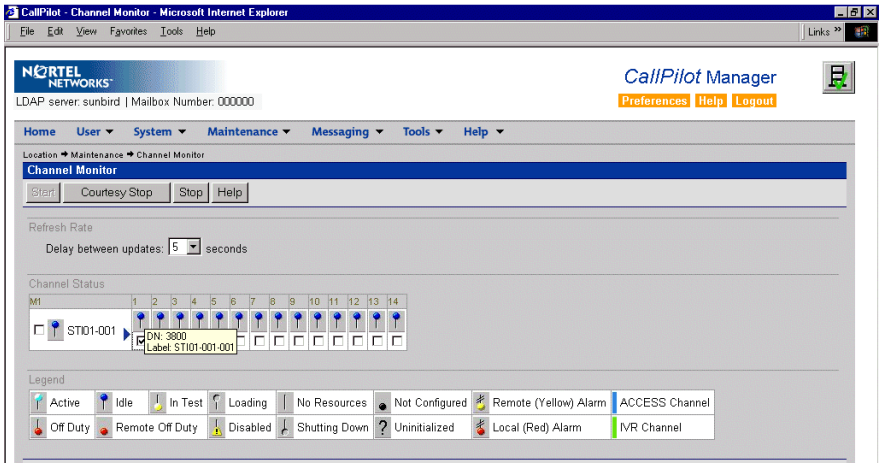
3 Check the check box for each DSP channel.

4 Do one of the following:

IF you want to	THEN
take the selected channels off duty	do the following: **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	click Start. **Result:** The selected DSP channels change to on duty status.

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 Check the check box for each DS0 channel.

7 Do one of the following:

IF you want to	THEN
take the selected channels off duty	do the following: **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 DS0 channels change to off-duty status. **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.
put the selected channels on duty	click Start. **Result:** The selected DS0 channels change to on duty status.

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 Networks 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 54.

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 their desktop messaging, web messaging, and administration sessions are logged off.

Before you begin

If your server is an 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 38.

2 Courtesy stop all call channels.

For instructions, see “Stopping and starting channels” on page 54.

3 Do one of the following:

IF you are	THEN
at the server	continue with step 4.
at a PC connected remotely to the server	do the following: **a.** Use pcAnywhere to connect to and log on to the CallPilot server. **b.** Continue with step 4.

4 Close all applications on the server.

Note: Applications that you do not 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."	Choose one of the following: ■ Other (Planned) ■ Hardware Maintenance (Planned) ■ Hardware Installation (Planned) ■ Operating system: Reconfiguration (Planned) ■ Application: Maintenance (Planned) ■ Application: Installation (Planned) ■ Security Issue
Comment	If you selected "Other (Planned)" above, the OK button is grayed out. 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 38.

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 54.

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 in 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 65.

ATTENTION

When power is lost at the 201i serveror SL-100, the CallPilot server must be shut down gracefully. After power is restored to the 201i server or SL-100 and the T1 trunks are operational, reboot the CallPilot server.

ATTENTION

Nortel Networks 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 54.

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 their desktop messaging, web messaging, and administration sessions are logged off.

Before you begin

If your server is an 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 38.

2 Courtesy stop all call channels.

For instructions, see “Stopping and starting channels” on page 54.

3 Do one of the following:

IF you are	THEN
at the server	continue with step 4.
at a PC connected remotely to the server	do the following: **a.** Use pcAnywhere to connect to and log on to the CallPilot server. **b.** Continue with step 4.

4 Close all applications on the server.

Note: Applications that you do not 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."	Choose one of the following: ■ Other (Planned) ■ Hardware Maintenance (Planned) ■ Hardware Installation (Planned) ■ Operating system: Reconfiguration (Planned) ■ Application: Maintenance (Planned) ■ Application: Installation (Planned) ■ Security Issue
Comment	If you selected "Other (Planned)" above, the OK button is grayed out. 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.
an 201i server	do the following: **a.** Ensure that DOWN appears on the server hex display. **Note:** The red LED power status indicator remains lit during the shutdown until the system is restarted.  **CAUTION** **Risk of equipment damage** Wait at least 2 minutes before removing the 201i to allow the drive to park the head. **b.** Remove the server from the switch.

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.
an 201i server	do the following: **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 startup sequence as follows:

IF your server is a	THEN
tower or rackmount server	Observe the Power-On Self-Test (POST) and initialization messages on the monitor.
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 a	THEN
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 startup problems" in the *CallPilot <server model> Server Maintenance and Diagnostics* guide for your server.
201i server	The operating system start sequence begins, and communication with the switch occurs. The HEX display shows NT (for about 30 seconds), followed by OK. The operating system logon prompt appears on the monitor. **Note:** Before OK appears, one of the following messages may appear, but not for more than one second: `CDLN`, `C:01`, or `C:02`. This is normal operation. If OK, or the logon prompt, or both, do not appear, see "Troubleshooting startup problems" in the *CallPilot <server model> Server Maintenance and Diagnostics* guide for your server.

. **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 step 8.

8 Log on to the server with CallPilot Manager.

For instructions, see “Logging on to the CallPilot server with CallPilot Manager” on page 38.

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 54.

10 Ensure that CallPilot is ready to accept calls.

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

Chapter 8

Troubleshooting system problems

In this chapter

Overview 72

Using the Installation and Configuration guides 74

Using the CallPilot Administrator's Guide 79

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 are 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) ■ startup sequence and diagnostic codes	■ System Event Log (703t server only) ■ installation and configuration log files

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

Using the *Installation and Configuration* guides

Introduction

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

LEDs

Server type	Description
tower or rackmount server	The tower and rackmount servers provide LEDs on their front panel, on CD-ROM and tape drives, and on network interface cards. These LEDs indicate the operating status of the server or drive. On the network interface card, the LEDs also indicate if network activity is present.
201i server	The LEDs on the 201i server faceplate indicate when ■ the server and MPC-8 cards are in use ■ the network interfaces, hard drive, and SCSI device are in use (201i server only) ■ it is safe to remove the server from the switch, or the MPC-8 card from the server The HEX display on the 201i server faceplate displays messages that appear during startup or normal server operation. For more information, refer to “LED and HEX displays” in the *CallPilot <server model> Server Maintenance and Diagnostics* guide for your server.

Startup sequence and diagnostic codes

To help you determine if the server started successfully (or if it failed), watch the startup 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 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 install, reinstall, 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 startup 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 Networks 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 Networks channel partnerfor 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 your 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 9

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 Networks 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 Networks 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 88

Required tools and materials 92

Customer-supplied items checklist 94

CallPilot server hardware checklist 97

CallPilot hardware and documentation spares checklist 102

CallPilot software media and documentation checklist 103

Preinstalled software 105

Site inspection checklist

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

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

Check	Description
❒	Ensure that there is adequate space for all equipment. ■ If your server is a tower or rackmount server, ensure that there is adequate space for access to the front, side, and rear panels of the server. ■ Ensure that there is adequate space for air flow around the peripheral equipment, for ventilation.
❒	Ensure that there is a desk, shelf, or table available for the monitor, keyboard, mouse, and modem.
❒	Ensure that an external analog phone line is available for the modem. **Note:** The line should not be connected to the customer's switch. If the switch goes down, the CallPilot server cannot be supported from a remote location.

Check	Description
❒	Ensure that a single-point ground reference is available for all the power outlets serving the CallPilot server and its peripherals. Before the CallPilot server installation, a qualified electrician must implement the single-point ground reference requirement between the power outlets of the CallPilot server and the power outlets of the switch. Refer to the section single-point grounding requirements in *CallPilot Fundamentals* for further details. Provide a sufficient number of properly grounded power outlets or power bars for all equipment. You need one outlet for each of the following items: ■ server (if your server is a tower or rackmount platform) ■ 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) ■ ELAN Subnet and NNS Subnet switches or hubs **ATTENTION** A Class A switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements. ■ Symposium Call Center server (if installed) ■ customer-supplied network equipment (if required) ■ uninterruptible power supply (UPS) [if installed] **Note:** Nortel Networks strongly recommends that you use a UPS to maintain power to the server and ELAN/NNS Subnet switch or hubs in the event of a power outage.

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 (NNS Subnet and ELAN Subnet) — default gateway (NNS Subnet) ■ direct inward dial (DID) numbers on the switch Record this information on the following worksheets, as required: ■ “Switch or system configuration worksheet” on page 109 ■ “Configuration Wizard worksheet” on page 113
❒	Ensure that the items that are listed on the “Customer-supplied items checklist” on page 94 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
❒	Antistatic ESD wrist strap (recommended)
❒	Various sizes of Phillips cross-head and standard screwdrivers **Note:** If your server is a tower or rackmount server, magnetic screwdrivers are recommended to prevent you from losing the screws inside the server chassis. **ATTENTION** To prevent data loss, keep magnetic screwdrivers away from backup tapes, floppy disks, and hard drives.
❒	A set of hex nut drivers
❒	Side cutters
❒	Jumper removal tool or needle-nosed pliers
❒	Tweezers
❒	Tape measure for determining cable lengths
❒	A flashlight for examining the interior of a tower or rackmount server chassis
❒	Pen for writing notes, cable lengths, and cable identifications
❒	Cable tie wraps
❒	Cable identification labels

Check	Item
❒	Equipment log The equipment log is used to record the model and serial number of the system, all installed options, and other information.
❒	Null modem serial cable (it can be useful for troubleshooting)
❒	If the CallPilot server is a 201i server, an external tape drive for the 201i server The tape drive is required when performing backups or restoring data from backups.
❒	If the CallPilot server is a 201i server, an external CD-ROM drive The external CD-ROM drive is required when installing CallPilot or operating system software.
❒	For any server model, a monitor peripheral kit to access the CallPilot system for maintenance purposes
❒	A computer with a CD-ROM drive that is separate from the CallPilot server (such as a laptop computer). This is required for reading documentation on CD-ROM and for connecting to the CallPilot server network for troubleshooting.

Customer-supplied items checklist

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

Check	Item
❒	Secure location for the CallPilot server and peripheral equipment Windows and doors should be kept locked and provide access only to authorized personnel.
❒	External analog phone line for the modem. The line should not be connected to the switch. If the switch goes down, the CallPilot server cannot be supported from a remote location.
❒	Web-enabled administrative PC The web-enabled administrative PC should be in close proximity to the CallPilot server, and must have ■ network connectivity to the CallPilot server (it can be on the NNS Subnet or ELAN Subnet) ■ one of the following web browsers installed: — Internet Explorer 5 or later — Netscape Communicator 6.2 or later ■ 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 Networks, if required
❒	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 if you 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 Networks technical support to connect to the ELAN Subnet from a remote location.
❒	TCP/IP-based NNS 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 NNS Subnet segmentation or multiple-LAN protocols.
❒	A hub for the NNS Subnetor 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 NNS Subnet (optional)

Check	Item
❒	Web server PC, if ■ CallPilot Manager and CallPilot Reporter will be installed on a stand-alone server CallPilot Manager is the web-based software that you use to administer the CallPilot server. CallPilot Manager must be installed on a stand-alone web server if you want to use CallPilot Reporter. You cannot install CallPilot Reporter on the CallPilot server. ■ My CallPilot will be used by mailbox owners My CallPilot is a web-based portal that provides access to CallPilot messages and mailbox configuration over the Internet. My CallPilot can be installed on the same web server as CallPilot Manager. For information about the web server PC requirements for CallPilot Manager and My CallPilot, refer to the following sections in the *CallPilot Software Administration* guide: ■ "Installing CallPilot administrative software on a stand-alone web server" ■ 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	
❒	Keycode printed on a label that lists the purchased features
❒	Tower or rackmount CallPilot server The server contains the following items, which are already installed: ■ CD-ROM drive ■ hard drive(s) ■ network interface card(s) ■ One or more MPB boards (MPB96)
❒	Keyboard and mouse
❒	SVGA 14-in. monitor
❒	Modem with cable and power cord (for remote access)
❒	Ethernet hub(s), if purchased from Nortel Networks

Check	Item
	201i server and peripheral devices
❒	Keycode printed on a label that lists the purchased features
❒	201i server
❒	Multi I/O cable (NTRH0912)
❒	EMC kit (NTRH3503) **Note:** The EMC kit is required for Option 11C Mini and Succession 1000 systems only.
❒	Backplane (tip and ring) cable (NTRH3501) **Note:** This cable is required for Meridian 1 Option 51C–Option 81C systems only.
❒	One of the following groups of SCSI cable(s): ❒ For Meridian 1 Option 51C–Option 81C: — NTRH1408 — NTRH1410 — NTRH3502 ❒ For Option 11C: — NTRH1407 — NTRH3502 ❒ 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.
❒	MPC-8 card(s) to provide the number of channels purchased for CallPilot

Check	Item
❒	SVGA 14-in. monitor
❒	Keyboard and mouse **Note:** If you are using a USB mouse, ensure that you also have a USB-to-PS/2 converter and a PS/2 extension cable (A0855616).
❒	Modem with cables and power cord (for remote access)
❒	Ethernet hub(s), if purchased from Nortel Networks
❒	External CD-ROM drive with NTRH3502 SCSI and power cables
❒	External tape drive with SCSI and power cables

Meridian 1 or Succession 1000 connectivity items—rackmount server only

❒	MGate card(s) (NTRB18CA)
❒	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.

Check	Item
❒	SMDI link modem connection equipment (if the switch has an IOM and is more than 229 m or 750 ft from the server) ❒ Long-haul modems (2 modems) ❒ Modem cable for connection to CallPilot ❒ IOM cable ❒ Smart connector **Note:** A cable is also required to connect the two modems. Pinout information for this cable is provided in the *<switch model> and CallPilot Server Configuration* guide for your switch and server. This cable is created or supplied by the customer or installer.
❒	SMDI Link Direct Connection equipment ❒ DB-9 (F) to DB-25 (F) Null Modem cable ❒ IOC cable
❒	SMDI Link Direct Connection equipment ❒ DB-9 (F) to DB-25 (M) Null Modem cable ❒ IOM cable ❒ Smart Connector
Nortel Networks Multimedia Communication Server 5100 (MCS 5100) connectivity items—rackmount platforms only	
❒	AudioCodes T1-CAS gateway
❒	iTouch terminal server

Check	Item
❒	MCP-MRV serial cable for iTouch terminal server

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
❒	MPB board	1
❒	MPC-8 cards (for the 201i server) or MPB16-4 boards	4
❒	201i server hard drive	1
❒	703t server hard drive	1
❒	1002rp server hard drive	1
❒	Network hub	1
❒	Network cable	1
❒	All CallPilot server software CD-ROMs For a complete list, see “CallPilot software media and documentation checklist” on page 103.	1 of each CD-ROM

CallPilot software media and documentation checklist

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

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

Check	Item
❒	CallPilot Image CD-ROMs (2 CD-ROMs)—contains 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).
❒	CallPilot Service Update/PEP CD-ROM: ■ Service Updates and PEPs
❒	CallPilot Application CD-ROM — contains applications that can be reinstalled. ■ CallPilot server software ■ CallPilot Manager and Reporter ■ CallPilot Application Builder ■ pcAnywhere ■ Adobe Acrobat Reader
❒	CallPilot Desktop Client software

Check	Item
❒	CallPilot My CallPilot software web-based software (provides mailbox access for end-users)
❒	CallPilot language prompts CD-ROM set (3) ■ Americas language prompts ■ EMEA language prompts ■ Asia-Pacific language prompts
❒	CallPilot Documentation CD-ROM
❒	The following printed CallPilot documentation: ❒ *CallPilot Distributor Technical Reference* (DTR) **Note:** You can obtain other CallPilot documentation from the CallPilot Documentation CD-ROM, or from the Installation and Administration Help area in CallPilot Manager. See “Related information” on page 11 for more details about the available documents.

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 the table with "CallPilot Image CD-ROMs (2 CD-ROMs)—contains an image of the CallPilot software.," on page 103).

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, if RAID is included with the tower or rackmount server
- SQL Anywhere database
- pcAnywhere
- Adobe Acrobat Reader (for online viewing of the CallPilot documentation)
- other equipment manufacturers (OEM) right to use (RTU) software certificates

  Nortel Networks 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 re-installation in the event of disk failure. If the server is replaced or decommissioned, you must return all OEM RTUs to Nortel Networks with the server hardware.

Nortel Networks 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 Networks. 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 Networks 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

Overview 108

Switch or system configuration worksheet 109

Configuration Wizard worksheet 113

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 Networks 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

❒ Meridian 1 ❒ Option 51C, 61C, 81, 81C ❒ Option 11 or Option 11C Mini	See “Meridian 1 or Succession 1000 information” on page 110
❒ Succession 1000	

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 NNS Subnet (CLAN).

ACD queue and agents (Overlays 11 and 23)

ACD DN of CallPilot agents (Overlay 23): _____

Agent TNs (Overlay 11): _____

Position ID on Key0: _____

SCN on Key1: _____

Default ACD DN for CDN (Overlay 23): _____

CDN queues (Overlay 23)

Primary CDN (Voice Messaging): _____

Secondary CDN (Multimedia Messaging): _____

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

CallPilot application name: _____

Superloop (Overlay 97): _____

Phantom DN (Overlay 10): _____

DCFW CDN: _____

CallPilot application name: _____

Superloop (Overlay 97): _____

Phantom DN (Overlay 10): _____

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

DCFW CDN: _____

CallPilot application name: _____

Superloop (Overlay 97): _____

Phantom DN (Overlay 10): _____

DCFW CDN: _____

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

CallPilot application name: _____

ACD DN: _____

NCFW CDN: _____

CallPilot application name: _____

ACD DN: _____

NCFW CDN: _____

CallPilot application name: _____

ACD DN: _____

NCFW CDN: _____

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 114
- "Meridian 1 or Succession 1000 information," on page 119

CallPilot information

Company name:	_____
Customer name:	_____
Serial number:	Get the serial number from the CallPilot keycode label.
Keycode:	Get 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 record the passwords in this guide. Photocopy the page, record the new passwords, and store the page in a secure place.

Password type	Current Password	New Password
Administrator	default: Bvw_250!#	
NGenSys	default: Bvw_250!#	
NGenDist	default: Bvw_250!#	
NGenDesign	default: Bvw_250!#	

pcAnywhere password

Password type	New Password
CallPilotDist	

For more information on changing the pcAnywhere password see:

- Step "5 Change the CallPilotDist password for pcAnywhere." on page 23
- the section "Changing pcAnywhere passwords" in <*switch model*> *and CallPilot Server Configuration* guide for your switch and server.

Multimedia allocation

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

Application DN information

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

Languages

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

CallPilot network information

Embedded LAN TCP/IP Information (Meridian 1 and 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 NNS 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 Networks Server Subnet (NNS 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:
- ❒ Meridian 1
- ❒ Option 11 or Option 11C Mini
- ❒ 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 109.

Number of TNs: _____

Dedicated to:
- ❒ ACCESS ACD queue
- ❒ IVR ACD queue

Note: Check either 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 109.

Number of TNs: _____

Dedicated to:
- ❒ ACCESS ACD queue
- ❒ IVR ACD queue

Note: Check either 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 109.

Number of TNs: _____

Dedicated to:
- ❒ ACCESS ACD queue
- ❒ IVR ACD queue

Note: Check either 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): _____

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CallPilot

Installation and Configuration Task List

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