CallPilot

Installation and Configuration Planner

CallPilot 2.0 Standard 1.0 September 2002

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CallPilot

Installation and Configuration Planner

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Chapter 1

About this document

Introduction

This document provides

- high-level task flows to help distributors plan and execute installations and upgrades
- specific references to more detailed information for each task

Task flows

The task flows support

- distributor and customer awareness of the effort, materials, and resources required to get a CallPilot server running and usable
- minimizing the CallPilot downtime associated with upgrades and troubleshooting
- minimizing the time required at customer sites for new installations
- minimizing calls for technical support
- customer change management processes

Intended audiences

These task flows address expert installers as well as less experienced administrators.

Typically, distributors are responsible for planning, installing, and upgrading CallPilot servers. Distributors and customers share responsibility for configuring the system to suit the needs of the customer.

Intended use

This document is intended to help both expert and first-time or infrequent installers and administrators make effective use of the CallPilot documentation. It is not intended to replace the NTPs.

This document is easy to carry from site to site. Nortel Networks recommends that you insert it at the front of Part 1 of the *CallPilot Installation and Configuration* binder so that it is always handy.

Expert installers and administrators

Installers and administrators who are very experienced in CallPilot planning, installation, and administration processes can use this document to ensure that all steps are completed accurately, efficiently, and cost-effectively.

First-time or infrequent installers and administrators

Installers and administrators who are relatively inexperienced in CallPilot planning, installation, and administration processes can use this document to ensure they are properly prepared to carry out all required tasks.

Worksheet and checklist copies

Both expert and first-time or infrequent installers and administrators can use the Installation and Configuration worksheets and checklists for each installation, upgrade, and configuration of a CallPilot server.

The Installation and Configuration worksheets and checklists are not designed as stand-alone documents. They are included in Part 1 of the *CallPilot Installation and Configuration* binder. To print usable copies of each worksheet and checklist, use the Installation and Configuration documents that are available as PDF files on the CallPilot Documentation CD (NTRG19AF).

Note: The task flows provide references that explain the use of each worksheet and checklist.

Chapter 2

Upgrades

Introduction

The “Upgrading the CallPilot server” section in Part 1 of the *CallPilot Installation and Configuration* binder contains a “Server upgrade checklist” that identifies the tasks that must be completed when upgrading a CallPilot server. Tasks on that checklist are presented in the order in which they are to be completed.

ATTENTION

You can upgrade to CallPilot 2.0 only from CallPilot 1.07.09.

Note: The “Server upgrade checklist” provides an estimate of the time required to perform each task.

To help you plan and execute the installation and configuration of the CallPilot server, refer to the following sections:

For	See
distributor’s tasks before going to the customer’s site	“Offsite upgrade preparation tasks” on page 12
distributor’s tasks at the customer’s site	“Onsite pre-upgrade tasks” on page 13
tasks typically shared between the distributor and customer	■ “Onsite upgrade tasks” on page 14 ■ “Onsite testing tasks” on page 29 ■ “Onsite configuration and administration tasks” on page 32

Offsite upgrade preparation tasks

Task	Reference
1 Review the documentation for upgrading the server software and ensure that your upgrade scenario and path are supported.	■ Part 1 of the *CallPilot Installation and Configuration* binder, "Upgrading the CallPilot server" ■ Part 4 of the *CallPilot Installation and Configuration* binder, Section A: "Upgrading the CallPilot server software"
2 Complete the following configuration worksheets: ■ Switch configuration worksheet ■ Configuration Wizard worksheet	Part 1 of the *CallPilot Installation and Configuration* binder, Chapter 4, "Configuration worksheets"
3 Determine how long the system will be down for the upgrade.	Not applicable.
4 Contact the customer to arrange for a maintenance window.	Not applicable.

Onsite pre-upgrade tasks

Task	Reference
1 As you verify that the server is ready for the upgrade, complete the "Upgrade readiness checklist."	Part 4 of the *CallPilot Installation and Configuration* binder, "Upgrade readiness checklist"
2 In the event that the existing system must be restored, have the following ready: ■ necessary CallPilot 1.07 media (platform-dependent) ■ complete system backup	Not applicable.

Onsite upgrade tasks

Task	Reference
1 Courtesy down all channels.	Part 1 of the *CallPilot 1.07 Monitoring and Security Guide*, Chapter 12“Managing channels”
2 Upgrade the Windows NT operating system.	Part 4 of the *CallPilot Installation and Configuration* binder, “Updating the Windows NT operating system for CallPilot 2.0”
3 Upgrade the CallPilot server software. **Note:** The upgrade process ■ automatically installs CallPilot Manager ■ prompts you to install performance enhancement packages	Part 4 of the *CallPilot Installation and Configuration* binder, “Upgrading the CallPilot server software”
4 Perform any required hardware changes. **Note:** You determine whether hardware changes are required when you complete the Upgrade Readiness checklist as part of the upgrade planning.	Part 4 of the *CallPilot Installation and Configuration* binder, “Performing hardware changes”
5 Restart the CallPilot server.	Part 1 of the *CallPilot Installation and Configuration* binder, “Restarting the server”

Task		Reference
6	Use CallPilot Manager to log on to the CallPilot server.	Part 1 of the *CallPilot Installation and Configuration* binder, “Logging on to the CallPilot server with CallPilot Manager”
7	Run the Configuration Wizard. For configuration information, refer to the “Configuration Wizard worksheet.”	Part 3 of the *CallPilot Installation and Configuration* binder, “Configuring the CallPilot server software”
8	Restart the CallPilot server.	Part 1 of the *CallPilot Installation and Configuration* binder, “Restarting the server”
9	*If you are using a Network Management System:* Configure and start the SNMP service.	*CallPilot Administrator’s Guide*, Chapter 12, Section D, “Configuring CallPilot to send SNMP traps to a Network Management System”
10	Re-enable channels.	Part 4 of the *CallPilot Installation and Configuration* binder, “Putting the upgraded system into operation”
11	*For most customers:* Verify web server security and install CallPilot Manager and Reporter on a stand-alone web server. **Note:** Ensure that the web server meets requirements. Nortel Networks recommends an external security audit.	Part 4 of the *CallPilot Installation and Configuration* binder, “Installing CallPilot administrative software on a stand-alone web server”
12	Perform onsite operation tests.	“Onsite testing tasks” on page 29 of this document

Task	Reference
13 *For 702t or 1001rp servers equipped with RAID:* Resynchronize the hard drives.	Part 5 of the *CallPilot Installation and Configuration* binder. The specific reference depends on your RAID controller: ■ "Splitting AcceleRAID352 RAID drives and upgrading software" OR ■ "Splitting DAC960 RAID drives and upgrading software"
14 *If purchased by the customer:* Install desktop messaging or My CallPilot, or both, on users' personal computers.	Part 4 of the *CallPilot Installation and Configuration* binder, Chapter 5, "Installing desktop messaging and My CallPilot" **Note:** See "Desktop messaging and My CallPilot configuration tasks" on page 35 of this document.
15 *If purchased by the customer:* Configure fax services.	"Fax services configuration tasks" on page 36 of this document
16 *If purchased by the customer:* Configure speech activated messaging services.	"Speech activated messaging service configuration tasks" on page 37 of this document
17 *If purchased by the customer:* Configure E-mail by Phone options.	"E-mail By Phone configuration tasks" on page 38 of this document
18 Perform a full system backup.	*CallPilot Administrator's Guide*, Chapter 8, "Backing up and restoring CallPilot information"

Chapter 3

Platform migrations

Introduction

Perform a platform migration whenever you want to migrate from one CallPilot server to another CallPilot server without losing any existing CallPilot information. The migration path must be from an existing CallPilot platform to another equivalent or larger CallPilot platform

ATTENTION

Ensure that you read all of the instructions before attempting to perform a platform migration. Only technicians who are familiar with CallPilot should attempt this procedure.

For	See
distributor's tasks before going to the customer's site	"Offsite planning tasks" on page 18
distributor's tasks at the customer's site	■ "Onsite installation and configuration tasks" on page 19 ■ "Onsite testing tasks" on page 29

Offsite planning tasks

Task	Reference
1 Ensure that your planned platform migration path is supported.	Part 4 of the *CallPilot Installation and Configuration* binder, “Platform migration requirements”
2 Become familiar with all platform migration constraints and requirements.	Part 4 of the *CallPilot Installation and Configuration* binder, “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.	**Note:** The total time the system will be out of service ranges from 9 hours, to 14 hours.

Onsite installation and configuration tasks

Task	Reference
1 Ensure that both servers are running identical software versions.	Part 4 of the *CallPilot Installation and Configuration* binder, "Platform migration overview," "Stage 1: Ensure that both servers are running identical software versions"
2 Ensure that the following drivers are installed: ■ correct SCSI device driver (if the original server is a 200i server only) ■ correct tape drive driver (on both the original and target servers) **Note:** If either server was upgraded to CallPilot 2.0, it is possible that the tape drive driver is not installed.	Part 4 of the *CallPilot Installation and Configuration* binder, "Stage 2: Verify that the correct SCSI device and tape drive drivers are installed"
3 Back up the original server.	Part 4 of the *CallPilot Installation and Configuration* binder, "Platform migration overview," "Stage 3: Back up the original server"
4 Prepare the target server.	Part 4 of the *CallPilot Installation and Configuration* binder, "Platform migration overview," "Stage 4: Prepare the target server" 2
5 Restore and configure the target server.	Part 4 of the *CallPilot Installation and Configuration* binder, "Platform migration overview," "Stage 5: Restore and configure the target server" 2

Task	Reference
6 Bring the target server into service.	Part 4 of the *CallPilot Installation and Configuration* binder, “Platform migration overview,” “Stage 6: Bring the target server into service”
7 Expand the CallPilot features	Part 4 of the *CallPilot Installation and Configuration* binder, “Expanding features”
8 Perform onsite operation tests.	“Onsite testing tasks” on page 29 of this document
9 Perform a full system backup.	*CallPilot Administrator’s Guide*, Chapter 8, “Backing up and restoring CallPilot information”

Chapter 4

New installations

Introduction

The “Installing CallPilot” section in Part 1 of the *CallPilot Installation and Configuration* binder contains an “Installation checklist” that identifies the tasks that must be completed when installing a new CallPilot server. Tasks on that checklist are presented in the order in which they are to be completed.

Note: The “Installation checklist” provides an estimate of the time required to perform each task.

To help you plan and execute the installation and configuration of the CallPilot server, refer to the following sections:

For	See
distributor’s tasks before going to the customer’s site	“Offsite pre-installation tasks” on page 22
tasks typically shared by the distributor and customer at the customer’s site	■ “Onsite installation preparation tasks” on page 23 ■ “Onsite installation tasks” on page 25 ■ “Desktop messaging and My CallPilot installation tasks” on page 28 ■ “Onsite testing tasks” on page 29 ■ “Onsite configuration and administration tasks” on page 32

Offsite pre-installation tasks

Task	Reference
1 Become familiar with the CallPilot server installation process and requirements.	Part 1 of the *CallPilot Installation and Configuration* binder, “Installing CallPilot”
2 Become familiar with all pertinent safety guidelines and complete the following configuration worksheets: ■ Switch Configuration worksheet ■ Configuration Wizard worksheet	Part 1 of the *CallPilot Installation and Configuration* binder: ■ Chapter 3, “Installation preparation checklists” ■ Chapter 4, “Configuration worksheets” ■ Chapter 5, “Safety Guidelines” **ATTENTION:** Failure to comply with the safety guidelines described in Part 1 of the *CallPilot Installation and Configuration* binder can result in personal injury or equipment damage.
3 Meet with the customer to determine how responsibility for onsite configuration and administration tasks will be shared.	Chapter 6, “Configuration and administration” of this document
4 Determine how much time will be required for the installation.	Not applicable
5 Contact the customer to arrange a timeslot for the installation.	Not applicable

Onsite installation preparation tasks

Task	Reference
1 Verify that the customer site is clean, properly laid out and properly equipped.	Part 1 of the *CallPilot Installation and Configuration* binder, “Site inspection checklist”
2 Obtain the necessary network configuration information.	Customer’s network administrator
3 Verify that you have the tools and information required to install the hardware.	Part 1 of the *CallPilot Installation and Configuration* binder, “Required tools and materials”
4 Verify that the customer-supplied equipment meets requirements.	Part 1 of the *CallPilot Installation and Configuration* binder, “Customer-supplied equipment checklist”
5 As you unpack the hardware shipped from Nortel Networks, verify that the serial number and keycode match and that all hardware is in good condition.	Part 1 of the *CallPilot Installation and Configuration* binder, “CallPilot server hardware checklist”
6 Verify that you have all software media and documentation that you may need to complete the installation. **Note:** To install languages, you will need either the set of three Languages CDs or a network path to language prompt files.	Part 1 of the *CallPilot Installation and Configuration* binder, “CallPilot software media and documentation checklist”

Task	Reference
7 Inspect the server and report any damage to Nortel Networks.	Part 2 of the *CallPilot Installation and Configuration* binder for your server platform
8 Learn about the software installed on the CallPilot server.	Part 1 of the *CallPilot Installation and Configuration* binder, “Pre-installed software”

Onsite installation tasks

Task	Reference
1 Install the CallPilot server hardware. **Note:** Observe the startup sequence to verify the installation.	Part 2 of the *CallPilot Installation and Configuration* binder for your platform
2 For tower or rackmount servers only: **a.** Install the MGate cards in the switch. **b.** Connect the CallPilot server to the switch.	Part 3 for your switch type in the *CallPilot Installation and Configuration* binder: ■ "Installing the MGate card" (for the Meridian 1 or for the Succession CSE 1000) ■ "Connecting the CallPilot server to the MGate card" or for the Succession CSE 1000)
3 Use the "Switch configuration worksheet" to configure the switch to support CallPilot.	Part 3 for your switch type in the *CallPilot Installation and Configuration* binder, Chapter 3, "Configuring the Meridian 1 switch" or Chapter 3, "Configuring the Succession CSE 1000 system"
4 Use CallPilot Manager to log on to the CallPilot server.	Part 1 of the *CallPilot Installation and Configuration* binder, "Logging on to the CallPilot server with CallPilot Manager"

Task	Reference
5 Run the Configuration Wizard. For configuration information, refer to the "Configuration Wizard worksheet."	Part 3 of the *CallPilot Installation and Configuration* binder, "Configuring the CallPilot server software"
6 Restart the CallPilot server.	Part 1 of the *CallPilot Installation and Configuration* binder, "Restarting the server"
7 Change the CallPilot distributor password for pcAnywhere.	Part 3 of the *CallPilot Installation and Configuration* binder, "Configuring the CallPilot server software"
8 Test the installation.	"Onsite testing tasks" on page 29 of this document
9 Perform a full system backup.	*CallPilot Administrator's Guide*, Chapter 8, "Backing up and restoring CallPilot information"
10 *For most customers:* Verify web server security and install CallPilot Manager and Reporter on a stand-alone web server. **Note:** Ensure that the web server meets requirements. Nortel Networks recommends an external security audit.	Part 4 of the *CallPilot Installation and Configuration* binder, "Installing CallPilot administrative software on a stand-alone web server"
11 Install pcAnywhere [version 10.5] on the web server and a remote PC, and configure remote administration.	Symantec pcAnywhere product documentation

Task	Reference
12 *If purchased by the customer:* Install desktop messaging or My CallPilot, or both, on users' personal computers.	Part 4 of the *CallPilot Installation and Configuration* binder, Chapter 5, "Installing desktop messaging and My CallPilot" **Note:** See "Desktop messaging and My CallPilot configuration tasks" on page 35 of this document.

Desktop messaging and My CallPilot installation tasks

Task	Reference
1 Review and understand ■ the installation process ■ desktop messaging requirements ■ My CallPilot requirements	Part 4 of the *CallPilot Installation and Configuration* binder, Chapter 5, “Installing desktop messaging and My CallPilot”
2 Complete the Pre-installation checklist.	Part 4 of the *CallPilot Installation and Configuration* binder, “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.	Part 4 of the *CallPilot Installation and Configuration* binder, Chapter 5, “Installing desktop messaging”
5 Install the My CallPilot software.	Part 4 of the *CallPilot Installation and Configuration* binder, “Installing My CallPilot”

Chapter 5

Testing

Introduction

Once a CallPilot system has been installed, upgraded, or migrated to a different platform, perform the tests listed below in "Onsite testing tasks."

Onsite testing tasks

Task	Reference
1 Test the CallPilot connectivity, services, and channels.	Part 3 of the *CallPilot Installation and Configuration* binder, Chapter 5, "Testing the CallPilot 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.	Part 3 of the *CallPilot Installation and Configuration* binder, Chapter 5, "Testing the CallPilot installation"
4 Test mailbox search functions.	CallPilot Manager online Help book "Administering mailboxes" → "Finding mailboxes or mailbox owners"

Task		Reference
5	*If pcAnywhere was installed on a remote computer:* Test remote administration of the CallPilot server.	*CallPilot Administrator's Guide*, Chapter 5, "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*, Chapter 2: "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*, Chapter 2: "Understanding CallPilot features and services" ■ *CallPilot Application Builder Guide*

Chapter 6

Configuration and administration

Introduction

Typically, the distributor is responsible for upgrading CallPilot. Afterward, CallPilot administrators (who can be either distributor or customer administrators) 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 (SDLs)

Onsite configuration and administration tasks

Task		Reference
1	*For customers with more than 1000 mailboxes:* Add specialized administrators.	CallPilot Manager online Help book “Delegating administrative tasks”
2	Set up mailbox security.	CallPilot Manager online Help book “Securing the CallPilot system” → “Configuring mailbox security”
3	Customize restriction permission lists (RPLs).	CallPilot Manager online Help book “Securing the CallPilot system” → “Maintaining restriction permission lists (RPLs)” → “Customizing RPLs”
4	Verify basic messaging defaults.	CallPilot Manager online Help book “Configuring CallPilot services” → “Configuring messaging service defaults” → “Changing messaging defaults”
5	*If purchased by the customer:* Configure CallPilot networking.	CallPilot Manager online Help book “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 book “Managing mailbox creation and privileges” → “Using templates to create mailboxes”

Task	Reference
8 Customize system prompts.	CallPilot Manager online Help book "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 36 of this document
10 *If purchased by the customer:* Configure speech activated messaging services.	"Speech activated messaging service configuration tasks" on page 37 of this document
11 *If purchased by the customer:* Configure E-mail by Phone options.	"E-mail By Phone configuration tasks" on page 38 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 book "Administering mailboxes" → "Adding and removing mailboxes" ■ CallPilot Manager online Help book "Securing the CallPilot system" → "Configuring mailbox security"
13 Add custom applications (including voice menus).	■ CallPilot Manager online Help book "Configuring CallPilot services" ■ *CallPilot Application Builder Guide* ■ CallPilot Application Builder online Help topics

Task	Reference
14 Set up basic reports to monitor the system.	■ CallPilot Manager online Help book “Monitoring the CallPilot system” → “Running system status reports” ■ *CallPilot Reporter Guide*
15 *For upgrades:* Use CallPilot archives to migrate mailbox, custom prompt, and Application Builder information from CallPilot 1.07 to CallPilot 2.0. **Note:** When a CallPilot 1.07 system is upgraded to CallPilot 2.0 and you use mailbox (user) archives to migrate mailbox information, mailbox owners with remote notification capability are automatically given remote text notification capability.	CallPilot Manager online Help book “Securing the CallPilot system” → “Backing up and restoring CallPilot information” → “Using CallPilot archives”
16 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 book "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 38 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 book "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 book "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"

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