Distributor Technical Reference Bulletin

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CallPilot Release 3.0

Introduction

This Distributor Technical Reference (DTR) bulletin provides information that supplements the formal documentation for the purpose of installing, upgrading, and supporting CallPilot Release 3.0 (03.03.06.02) systems. It provides updated procedures, limitations, known problems, workarounds, and documentation addenda. This is an important information resource for Channel Partner field operations and support personnel involved with CallPilot 3.0.

For more details on feature installation and operation, refer to the CallPilot 3.0 Customer Documentation.

This document, as well as other Customer Documentation, may be updated periodically as needed. It's recommended to always reference the Partner Information Center and Helmsman Express websites for the latest information in updated NTPs or Release Notes documents.

Revision history

Issue Number / Date	Type of Review / Reason(s) for Issue	Author
Standard 1.0 / 22-Nov-04	Incorporated input from Alpha/Beta trials, GNTS/MDS; and details from rev-22 Release Notes; Updated X11/X21 PEP information; Included input from external review; Initial version DTR for 3.0 GA	Technology, GNTS, MDS, and Roger Brassard

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1 The Distributor Technical Reference Bulletin

1.1 Purpose

The purpose of the Distributor Technical Reference bulletin (DTR) is to provide the user with information for CallPilot 3.0 that is not covered by the NTP documentation supplied with the system. This DTR is intended for use in conjunction with the latest CallPilot 3.0 (03.03.06.02) software CDs. Refer to the complete listing in section 5.1.

1.2 What's new in CallPilot 3.0

While CallPilot 3.0 primarily focuses on rebasing the CallPilot application to the Windows 2003 Server Operating System (OS), it also includes the following improvements/enhancements:

- Simplified system installation process using "Image" CDs
- Hardware alignment between 703t and 1002rp
  - 1002rp Rackmount platforms now ship with MPB96 board instead of MPB16
- Two additional languages (Australian English and Japanese)
- Enhanced and condensed documentation suite including two new guides:
  - "Installation and Configuration Task List" for procedures-based tasks
  - "CallPilot Fundamentals" for an overview of all CallPilot components
- "Unified" Application Builder client that functions with 2.02, 2.5, and 3.0 servers
- Incorporates all improvements/enhancements available from CallPilot 2.02/Service Update 3 (SU03) and yet-to-be-released Service Update 4 and CallPilot 2.5/Service Update 2.
- Includes new version of Symantec pcAnywhere (11.0)
- Includes new version of Adobe Acrobat (6.0)
- Includes fully licensed version of Symantec Ghost (7.5 – Corporate Edition)
  - Can be used for imaging the CallPilot server
- Offers Windows Terminal Services as remote-connectivity option to pcAnywhere

1.3 Supported Operations

1.3.1 Features on Controlled Release

The following is a list of 3.0 features that are on controlled release.

- Speech Recognition and Custom Commands for languages other than North American English and German
- Email-by-Phone languages other than Dutch, English, French, German, Italian, Russian, and Spanish, (using either Western European ISO-8859-1 or UTF-8 message encoding)

1.3.2 Switch Integrations supported

The following switch integrations are supported:

- Meridian 1, Option 11C to 81C
- Communication Server 1000/1000M

1.3.3 Switch Integrations deferred

The following switch integrations will be supported in a future release:

- Meridian SL-100
- DMS-100

1.3.4 Server and Client Upgrades supported

No upgrades from previous CallPilot releases will be supported with CallPilot 3.0. Upgrade support from CallPilot 2.02 and 2.5 will be available with the introduction of CallPilot 3.1 which is currently targeted to GA in July-2005.

1.4 About Customer Documentation

The starting point for all CallPilot activities is the customer documentation that is included with the system. The CD-ROM titled "*CallPilot Product Release 3.0 Documentation on CD-ROM"* (NTRG19AH for English, NTRG19BG for non-English) contains all of the customer documentation available.

The documentation CD-ROM can be viewed on any PC using Adobe Acrobat Reader 4.0 or later (the Adobe software is included on the CD).

Note: These documents, as well as other Customer Documentation, may be updated periodically as needed. It's always recommended to reference the Partner Information Center and Helmsman Express websites for the latest information in updated NTPs or Release Notes documents.

1.5 Software Updates/Enhancements

After completing the upgrade, verify whether there are any additional PEPs to be installed. Refer to the PEP/Service Update application overview section for additional information.

1.6 Localized Media

The table below summarizes the localized CallPilot 3.0 media available:

Language	Voice Prompts	Desktop Messaging	My CallPilot	Speech Activated Messaging	E-mail by Phone	End-User Docs
Arabic	✓					✓
Cantonese (Traditional Chinese)	✓	2.02 only (2.01.27.16)				✓
Danish	✓					✓
Dutch	✓	✓			✓	✓
English, American (US)	✓	✓	✓	✓	✓	✓
English, Australian	✓	✓	✓		✓	✓
English, Canadian	✓	✓	✓	✓	✓	✓
English, Irish	✓	✓	✓		✓	✓
English, UK (Female)	✓	✓	✓	✓	✓	✓

Language	Voice Prompts	Desktop Messaging	My CallPilot	Speech Activated Messaging	E-mail by Phone	End-User Docs
Finnish	✓					
French, Canadian	✓					
French, European	✓	✓	✓	✓	✓	✓
German	✓	✓	2.02 only (2.01.27.09)	✓	✓	
Hebrew	✓					
Italian	✓	✓		✓	✓	
Japanese	✓	✓				
Norwegian	✓					✓
Portuguese, Brazilian	✓					
PRC Mandarin (Simplified Chinese)	✓	✓				✓
Russian	✓				✓	
Spanish, Castilian (European)	✓				✓	
Spanish, Latin American	✓	✓			✓	✓
Swedish	✓					✓
Taiwanese Mandarin (Traditional Chinese)	✓	2.02 only (2.01.27.16)				✓

Notes:

1. Desktop Messaging Languages (Software and Help). 2.50.06.17 provides localized versions of the product (Dutch, English, French, German, Italian, Spanish, or Simplified Chinese).
2. My CallPilot Languages (Software and Help). 2.50.06.23 is currently available in English and French only.
3. Email-by-Phone languages are not localized by dialect. For example, there is only one "English" version of Email-by-Phone that is deployed with all five English prompt sets.
4. End-user documentation is not localized by country. For example, customers in France and Quebec, Canada would use the same end-user documents.
5. Localized end-user documentation is available from the Helmsman web site.

2 Product Requirements

2.1 CallPilot 3.0 Compatibility

The following tables define CallPilot 3.0 compatibility with other products and environments it is likely to encounter.

Product / Function	CallPilot 3.0 Compatibility
Meridian Mail	• Co-existence with Meridian Mail on Meridian 1 or Communication Server 1000/1000M is supported. Networking to Meridian Mail available with AMIS-A and Enterprise networking protocols or via VPIM with Meridian Mail Net Gateway. However, there are limitations.
Meridian Mail Reporter	• Cannot be used to generate reports from a CallPilot server. Meridian Mail Reporter only supports Meridian Mail and CallPilot Reporter only supports CallPilot.
Meridian Administration Tool (MAT) or Optivity Telephony Manager (OTM)	• Co-existence of CallPilot Application Builder client with MAT 6.x and OTM 1.x and 2.x clients on the same PC is supported. • Please see Product bulletin 99092 for the CallPilot website for a detailed listing of compatibility with MAT.
Custom Controlled Routing (CCR)	• Co-existence of CCR and CallPilot on the same Meridian 1 is supported. • CallPilot does not support CCR command: Give IVR.
Symposium Call Center Server 1.x, 3.0, and 4.x; Symposium Express 1.0 and 2.0, 3.0, and 4.2	• Co-existence with Symposium Call Center Server or Express on the same M1/CS 1000 and ELAN is supported. • CallPilot 3.0 supports Symposium Call Center Server 4.2 and later integration for voice processing script commands: "Give IVR", "Give Controlled Broadcast", "Collect Digits", "Play Prompt", "Open…End Voice Session" but requires PEP SU-07 or later. • CallPilot 3.0 supports Symposium Express 4.2 integration for voice processing script commands "Give IVR" also requires PEP SU-08 or later.
Internet Telephony Gateway (ITG)	• CallPilot AMIS-Analog and Enterprise Networking is supported with ITG R1.1 (v1.0.34 or later). • Network Message Service (NMS) support requires ITG 2.0.
Microsoft Office 2000 and 2002 (XP)	• CallPilot 2.5 Desktop Messaging clients are compatible • CallPilot 3.0 Application Builder client is compatible

2.1.1 Migration from Meridian Mail

Migration from Meridian Mail systems to CallPilot 3.0 is supported using the Meridian Mail migration utility tape NTUB25AB (available within NTUB24AC Migration Package). This supports migration from all Meridian Mail MM11, MM12, and MM13 releases for all Meridian Mail platforms except the MSM and Card Option running MM13.11.2. It is required for all Meridian Mail releases including MM13.14 as this tape supersedes the migration utility available in the TOOLS level.

Note: Previous 1.07 versions of the migration utility NTUB24AA or NTUB24AB cannot be used with CallPilot 3.0. The Migration guide should be consulted for limitations.

Note: CallPilot requires use of the NTRB18CA MGate card for connectivity. Systems migrated from Meridian Mail must ensure only the updated MGate cards are used.

2.1.2 Application Builder client / Operating System (OS) compatibility

Operating Systems:	1.07	2.02/2.5	3.0
Windows 95 or 95A w/ Service Pack 1	✓		
Windows 95B OEM Service Release 2 (OSR2)	✓	✓	✓
Windows 98	✓	✓	✓
Windows 98SE (Second Edition)	✓	✓	✓
Windows ME			
Windows NT 4.0 Workstation (Service Pack 1)			
Windows NT 4.0 Workstation (Service Pack 2)			
Windows NT 4.0 Workstation (Service Pack 3)			
Windows NT 4.0 Workstation (Service Pack 4)			
Windows NT 4.0 Workstation (Service Pack 5)			
Windows NT 4.0 Workstation (Service Pack 6)			
Windows NT 4.0 Workstation (Service Pack 6A)	✓	✓	✓
Windows NT 4.0 Server			
Windows 2000 Professional (ISO-8859-1, Latin-1 character set versions)	Note 1	Note 1	Note 1
Windows 2000 Server and Advanced Server			
Windows XP Home			
Windows XP Professional	✓	✓	✓
Windows 2003 Server			
Macintosh OS 9.0 or 9.1			
Macintosh OS X			

Notes:

1. ISO-8859-1 (Latin-1) character sets cover most West European languages including but not limited to: English, French, Spanish, Catalan, Basque, Portuguese, Italian, Albanian, Rhaeto-Romanic, Dutch, German, Danish, Swedish, Norwegian, Finnish, Faeroese, Icelandic, Irish, Scottish, Afrikaans, and Swahili.
2. CallPilot 1.07 and 2.x (2.02 pre-SU04 and 2.5 pre-SU02) Application Builder clients are not compatible for use with a CallPilot 3.0 server.

2.1.3 Desktop Messaging / Groupware compatibility

CallPilot Desktop Messaging and My CallPilot support the following Groupware e-mail clients, Internet mail clients, Web clients, and thin clients:

Groupware E-mail clients	**1.07 (1.07.11.24)**	**2.5 (2.50.06.17)**
Microsoft Exchange 4.x	✓	
Microsoft Exchange 5.x	✓	
Microsoft Outlook 97	✓	
Microsoft Outlook 98 (Corporate Mode)	✓	✓
Microsoft Outlook 2000	✓	✓
Microsoft Outlook 2002 (XP)	Note 9	✓
Microsoft Outlook 2003		✓
Lotus Notes 4.5x	✓	
Lotus Notes 4.6x	✓	
Lotus Notes 5.0x	✓	✓
Lotus Notes 6.0		✓
Lotus Notes 6.5		✓
Novell GroupWise 5.5x	✓	
Novell GroupWise 6.0x	✓	✓
Novell GroupWise 6.5		✓
Internet Mail clients	**1.07 (1.07.11.24)**	**2.5 (2.50.06.17)**
Microsoft Outlook Express 4.x (Internet Explorer 4.0)	✓	
Microsoft Outlook Express 5.x	✓	✓
Microsoft Outlook Express 6.x		✓
Microsoft Outlook 98 (Internet Mail Mode)	✓	✓
Microsoft Outlook 2002 (XP) (Internet Mail Mode)	✓	✓
Microsoft Outlook 2003 (Internet Mail Mode)		✓
Netscape Messenger (Netscape Communicator) 4.5	✓	
Netscape Messenger (Netscape Communicator) 4.6	✓	
Netscape Messenger (Netscape Communicator) 4.7x	✓	
Netscape 6.2x		✓
Netscape 7.0, 7.1, and 7.2		✓
Qualcomm Eudora Pro 4.02	✓	
Qualcomm Eudora Pro 4.2	✓	
Qualcomm Eudora Pro 5.x	✓	✓

Thin clients	1.07 (1.07.11.24)	2.5 (2.50.0617)
Citrix Metaframe 1.8 on Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2000 Datacenter Server		✓
Citrix MetaFrame XP (Standard, Enterprise, or Advanced Editions) on Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2000 Datacenter Server		✓

Supplemental Version Notes:

2.5 (2.50.06.17) Desktop Messaging clients:

1. Are supported for use with a CallPilot 3.0 or 2.02/2.5 server.
2. Desktop client version 2.50.06.17 offers localization.

1.07 Desktop Messaging clients:

3. Are not supported for use with a 2.02/2.5 or 3.0 server due to reduced functionality:
    - Telset operations do not function (PC Playback does)
    - Unable to download address book; addressing will be manual

    Important: It is highly recommended that all Desktop Messaging clients utilize the 2.5 version with CallPilot release 3.0 (03.03.06.02). This will ensure maximum functionality.

4. Only Desktop Messaging client version 1.07.11.24 (Service Update 5) and later support Windows XP Professional

1.06/1.05 Desktop Messaging clients:

5. Are not supported for use with a CallPilot 3.0 or 2.02 server.

2.1.4 Desktop Messaging client / Operating System (OS) compatibility

Desktop Messaging clients are supported for use on the following Operating Systems:

Operating Systems	1.07 (1.07.11.24)	2.5 (2.50.06.17)
Windows 95 or Windows 95A w/ Service Pack 1	✓	
Windows 95B OEM Service Release 2 (OSR2)	✓	
Windows 98	✓	
Windows 98SE (Second Edition)	✓	✓
Windows ME	✓	
Windows NT 4.0 Workstation (Service Pack 1)	✓	
Windows NT 4.0 Workstation (Service Pack 2)	✓	
Windows NT 4.0 Workstation (Service Pack 3)	✓	
Windows NT 4.0 Workstation (Service Pack 4)	✓	
Windows NT 4.0 Workstation (Service Pack 5)	✓	
Windows NT 4.0 Workstation (Service Pack 6)	✓	
Windows NT 4.0 Workstation (Service Pack 6A)	✓	✓
Windows NT 4.0 Server		
Windows 2000 Professional	✓	✓
Windows 2000 Server, Advanced, or DataCenter Server		
Windows XP Home		
Windows XP Professional (Service Pack 2)	✓	✓
Windows 2003 Server		
Macintosh OS 9.0 or 9.1		
Macintosh OS X		

2.1.5 My CallPilot / Browser compatibility

My CallPilot Web Messaging supports the following Internet browsers:

Internet Browsers	2.02 (2.01.27.09)	2.5 (2.50.06.08)	2.5 (2.50.06.23)
Netscape Navigator 4.0x			
Netscape Communicator 4.5			
Netscape Communicator 4.6			
Netscape Communicator 4.7x			
Netscape 6.2x	✓	✓	✓
Netscape 7.0, 7.1, and 7.2		✓	✓
Microsoft Internet Explorer 4.x			
Microsoft Internet Explorer 5.x	✓	✓	✓
Microsoft Internet Explorer 6.0	✓	✓	✓

2.1.6 My CallPilot client / Operating System compatibility

My CallPilot clients are supported for use on the following Operating Systems:

Operating System	2.02 (2.01.27.09)	2.5 (2.50.06.08)	2.5 (2.50.06.23)
Windows 95 or 95A w/ Service Pack 1			
Windows 95B OEM Service Release 2 (OSR2)			
Windows 98	✓	✓	✓
Windows 98SE (Second Edition)	✓	✓	✓
Windows ME	✓	✓	✓
Windows NT 4.0 Workstations (Service Pack 1)			✓
Windows NT 4.0 Workstations (Service Pack 2)			
Windows NT 4.0 Workstations (Service Pack 3)	✓		
Windows NT 4.0 Workstations (Service Pack 4)	✓	✓	✓
Windows NT 4.0 Workstations (Service Pack 5)	Note 7	✓	✓
Windows NT 4.0 Workstations (Service Pack 6)		✓	✓
Windows NT 4.0 Workstations (Service Pack 6A)	✓		
Windows NT 4.0 Server	✓	✓	✓
Windows 2000 Professional		✓	✓
Windows 2000 Server, Advanced or DataCenter Server			
Windows XP Home			
Windows XP Professional	✓	✓	✓
Windows 2003 Server	✓	✓	✓
Macintosh OS 9.0 or 9.1	✓	✓	✓
Macintosh OS X			✓

Notes:

1. With CallPilot 2.02 (using My CallPilot version 2.01.27.09), only partial support for Mac OS 9.0 and 9.1 is available via My CallPilot when accessed with Internet Explorer or Netscape. Partial support functionality is read-only, listen-only mode similar to the web-messaging functionality provided in CallPilot 1.07. Also, no CallPilot Player, CallPilot Fax Viewer, or interaction with the TUI will be available. Listening to and viewing of CallPilot messages will be accessed via desktop only and handled by the resident audio player and picture viewer of the MAC OS.
2. With CallPilot 2.5 (using My CallPilot version 2.50.06.04 and later), full support of Mac OS 9.0 and 9.1 is available via My CallPilot accessed with Internet Explorer or Netscape. Full support means that Mac users will now be able to Compose, Send, Reply to messages, as well as utilize a CallPilot Player and Fax Viewer.
3. Partial support for Mac OS X is supported with My CallPilot version 2.50.06.11 and later. The functionality is the same as outlined above for the CallPilot 2.02 Mac My CallPilot Web Client. Any prior release of My CallPilot is not supported.

2.1.7 Supported server OS and Internet Browsers for use with My CallPilot, CallPilot Manager, and Reporter

CallPilot 3.0 My CallPilot, CallPilot Manager, and Reporter support the following operating systems and browsers:

Product / Function	CallPilot 3.0 Compatibility
Server side details:	
Operating Systems	• Windows NT 4.0 Server, Service Pack 6A • Windows 2000 Server with Service Pack 1 or later (**Note:** Advanced Server and DataCenter Server versions are not supported.) • Windows 2003 Server , Service Pack 1 or later
Internet Service software	• Internet Information Server 4.0 • Internet Information Server 5.0 (Service Pack 1 or later) • Internet Information Server 6.0
Client side details:	
Operating Systems	• Windows 98SE • Windows NT 4.0 workstation (Service Pack 6A) • Windows 2000 Professional • Windows XP Professional • MAC OS 9.0 and 9.1 (for My CallPilot only)
Browsers	• Netscape Communicator 6.2x (with proper Java J2SE extension. See note.) • Netscape Communicator 7.0, 7.1, and 7.2 • Internet Explorer 5.x, 6.x (with proper Java J2SE extension. See note.)

Notes:

- If Desktop Messaging and Web Messaging are installed on the same client PC, CallPilot Web Messaging will be compatible with all 2.x versions of the player.
- When using CallPilot Reporter, for proper operation of Java on Netscape 6.2 or Microsoft Internet Explorer 6.x, J2SE version 1.3.1_05 must be installed. If you have an earlier or later version of J2SE, it must be uninstalled first. J2SE versions can be downloaded from http://www.java.sun.com.
- Javascript and Cookies must be enabled in the web browser.
- Support for localized browsers is available in Dutch, English, French, German, and Traditional Chinese.
- CallPilot 3.0 "My CallPilot" does not support Windows 95.

2.1.8 Requirements for CallPilot Manager stand-alone web servers

The requirements for the stand-alone web server for installing CallPilot Manager (with or without CallPilot Reporter) and My CallPilot are as follows.

Supported Operating Systems	Supported
Windows NT 4.0 server with SP6a and Microsoft Internet Information Server (IIS) 4	Yes
Windows 2000 server with SP1 or SP2 and Microsoft Internet Information Server (IIS) 5	Yes
Windows 2003 Standard Edition	Yes
Windows 2003 Web Edition	Yes [1]
Windows 2003 Enterprise Edition	Yes [1]
Windows 2003 Datacenter Edition	To be decided

Note:

1. These flavors of the Windows 2003 OS are untested as of the time of publication of this document.

2.1.9 Platform Hardware/BIOS/Software requirements

This list is intended to be used in addition to the requirements that are captured in the current issue of the CallPilot 3.0 NTP documentation.

Platform	Component	Version
201i	BIOS	6.0.3
703t	BIOS	16 Build 75
	Firmware	FRU SDR 5.5 BMC 1.18
1002rp	BIOS	NNCXUA07
MPB96	Release	6 (Minimum)
LSI MegaRaid 1600	Firmware	111U

2.1.10 Supported customer LANs

Product / Function	CallPilot 3.0 Compatibility
10Base-T	All platforms
100Base-T	201i (IPE), 703t (Tower), and 1002rp (Rackmount) without additional hardware (see note)
1000Base-T	703t (Tower)

Notes:

- All other platforms include 10/100Base-T Ethernet LAN NIC cards except 703t, which includes 10/100/1000Base-T Ethernet LAN NIC.
- Token Ring (4 or 16 Mbps) LAN is not supported in CallPilot 3.0.
- ELAN must be configured for 10Base-T/Full duplex.
- If a switch is used for ELAN or CLAN, "Spanning Tree" must be turned off.
- CLAN should be configured for Auto-Detect.

2.1.11 Supported LAN/WAN Networking Protocols

CallPilot supports only TCP/IP (internet) networking protocols. Novell's IPX/SPX protocol is not supported.

2.2 Operational Requirements

2.2.1 3rd-party software and hardware

The addition of any 3rd-party software or hardware to the CallPilot server is not supported other than approved anti-virus applications (Refer to Product Bulletin P-2003-0151-Global – *CallPilot Support for Anti-Virus Applications* for details) or approved Microsoft security updates (Refer to Product Bulletin P-2003-0277-Global – *CallPilot Server Security Update* or published PAA Product Advisory Alerts). Doing so can destabilize the system; degrade its mission of providing real-time call processing performance, and cause future upgrades to fail. Refer to Product Bulletin 99067 – *CallPilot Unauthorized Hardware and Software* for more information.

2.2.2 Software dongle installation

The CallPilot dongle must be properly installed in the server prior to accessing CallPilot Manager.

2.2.3 Proper Power and Grounding

All CallPilot server installations (201i, 703t, and 1002rp) must follow the Meridian 1 and/or Communication Server 1000/1000M and CallPilot NTP guidelines for proper power and grounding, specifically, adhering to the Single-Point Ground Reference requirement. Failure to follow these

guidelines makes Meridian 1/Communication Server 1000/1000M and CallPilot susceptible to damage from electrical transients resulting from lightning and other power-ground disturbances.

The Single-Point Ground Reference includes all powered devices that attach directly to the PBX and its ancillary equipment. For a typical CallPilot installation, the following components are included:

- PBX
- CallPilot server
- Uninterruptible Power Supply (UPS) (if installed)
- Remote maintenance modem
- ELAN and CLAN hubs
- Administration/Maintenance PC (and associated monitor and printer)
- External CD-ROM and Tape drives (for 200i and 201i IPE servers)
- Symposium Call Center Server (if installed)

As well, in CallPilot Rackmount server installations, the following supplemental information applies:

- Ensure the CallPilot server chassis and equipment racks are isolated from other foreign sources of ground
  - Acceptable isolation methods include: isolation pads, grommet washers, chassis side rail strips and non-conducting washers, etc
- Where other equipment is also installed in the same 19" rack, ensure that all equipment derives ground from the same service panel as CallPilot and the switch, whether or not the equipment is AC or DC powered.
- In DC-powered server installations, ensure the PDU (Power Distribution Unit for DC applications) is installed on the same rack as the CallPilot server. This is required since the main ground wire for the PDU is not insulated from the metal enclosure.

It's also highly recommended that a UPS be equipped on Tower/Rackmount installations.

Important Note: Adherence to a Single-Point Ground reference applies to all existing installed-base systems as well as new CallPilot server installations. Whether working on a new install or performing maintenance on an existing system, verifying the system is properly grounded can help avoid damage or system outage from electrical transients.

2.2.4 Shutdown/Restart required after PBX maintenance procedures

To ensure proper operation of the CallPilot server after performing a SYSLOAD or Parallel Reload of the PBX, the CallPilot server must be rebooted to ensure all resources are properly re-acquired. As well, when possible, it's preferred that the CallPilot server be taken offline during the maintenance procedure and then restarted once the PBX work has been completed.

To perform a proper CallPilot shutdown/restart, use "Ctrl-Alt-Delete" and select "Shutdown" from the Windows Security window. Then from the Shutdown Computer dialog box that appears, select either "Shutdown" or "Shutdown and Restart" as appropriate.

2.2.5 201i IPE recommended handling procedures

To minimize data loss or damage to the drive media, when removing power from the 200i or 201i IPE server, ensure the system avoids excessive vibration until the hard drive heads have parked using the recommending handling procedure below. Refer to CR # Q00969066.

1. Perform a shutdown
2. Remove power by gently unseating the server from the backplane
3. Allow the server to remain still for approximately 15 seconds. This allows the drive heads to park to a "safe" zone.
4. Remove the IPE server as handle as normal following ESD guidelines.

3 Meridian 1 switch requirements

NTP 555-7101-222 – *CallPilot Installation and Configuration Guide – Part 3 – Meridian 1 and CallPilot Server Configuration.* Chapter 3 describes how to configure a Meridian 1 PBX to work with CallPilot. The following description is an addendum to this chapter, describing the specific Meridian 1 models supported, the supported X11 software releases, and the PEPs available for the various releases for proper CallPilot operation.

Section 3.1 lists the supported Meridian 1 models. Section 3.2 identifies the supported software releases. Section 3.3 lists required packages relevant to CallPilot. Section 3.4 provides a list of the available PEPs with a description of the issues addressed and its applicability to the system model and software release.

Note: **Information on the X11 software changes regularly.** For the most recent information on supported X11 software releases and PEPs refer to the Nortel Networks Enterprise Solutions PEP Library (ESPL) website at: http://www.nortelnetworks.com/espl (all regions)

Note: If you are new to the ESPL website, you will need to register for a user ID/password. Please apply on-line at http://www.nortelnetworks.com or contact Nortel Networks Channel Partner Account Manager.

3.1 Meridian 1 switches supported

Meridian 1 - Options 11C, 11C/Mini, 51C, 61C, 81, 81C

Note: The copper-connection Option 11C does not support ELAN, which is required for CallPilot.

3.2 Software Releases supported

Switch software releases supported are X11R25.40 or later.

3.3 X11 Packages required for CallPilot 3.0

Pkg #	Description
41	ACDB (ACD Package B)
46	MWC (Message Waiting Center)
214	EAR (Enhanced ACD Routing)
215	ECT (Enhanced Call Treatment)
218	IVR (Hold in Queue for IVR)
247	Call ID
324	NGEN (CallPilot Connectivity) See next table
364	NMCE (CallPilot)
254	PHTN (Phantom TN)

Package 324 requirements	
Pkg #	**Description**
77	CSL (Command Status Link)
153	X25AP (Application Module Link – AML)
164	LAPW (Limited Access to Overlays)
242	MULI (Multi-User Login)
243	Alarm Filtering
296	MAT (Meridian Administration Tool)

3.4 X11 PEPs to support CallPilot 3.0

It is highly recommended that the associated PEP table for each X11 release be reviewed for supplemental PEPs that may be applicable. The "Recommended" column denotes "Yes" if the PEP should be applied to all systems, or "Note x" if the PEP should be applied given special circumstances such as feature dependencies exist. For all other PEPs, the description should be used to identify whether or not the PEP should be applied. If the condition or scenario exists, the PEP identified should be applied.

3.4.1 X11 Release R25.40 PEPs for CallPilot

These PEPs are for CallPilot support on all M1 systems running X11 R25.40.

Recommended	PEP #	CR #	Description
Note 1	MPLR12907	MP01724	Obsolete – use MPLR17193 instead. CallPilot Ring-No-Answer ACD audit recovery workaround. This PEP is used in conjunction with MPLR13010.
Note 1	MPLR13010	TM17734	Obsolete – use MPLR17193 instead. CallPilot ring-no-answer (agent not idle) generic solution (includes parts p13010a6, p13010b6). This PEP is used in conjunction with MPLR12907.
	MPLR15156	MP10913	**(PI)** Revert from CallPilot to 1800 number fails if 1800 number is serviced by AT&T Central Office (via direct or tandem switch) and no answer supervision is provided. AT&T is non-compliant to ISDN specification.
Yes	MPLR15504	Q00337504 Q00351952 Q00743357 Q00755241 Q00776038 Q00839574	CallPilot on hold by attendant is mishandled, crosstalk occurs. CallPilot answering while on-hold interrupts active call. Attendant lockup after transferring call to phantom DN which DCFW to CallPilot
	MPLR15788	MP15257	Hot Line to CallPilot fails with "Your call cannot be completed…" message
	MPLR15829	MP10284	CDN passed to CallPilot when call is sent to Phantom DN
Yes	MPLR16084	MP14138	No CDR "N" record when a call forwards to CallPilot
	MPLR16214	MP17255	DISA call can't NCFW to CallPilot
	MPLR16351	MP17013	**For sites integrated with SCCS**: Automatic Agent login (ALOG) cannot be invoked
	MPLR16660	Q00460124	**For sites integrated with SCCS**: CallPilot 2.02 not passing call control back to SCCS 4.2 server.
	MPLR16867	Q00548995	Incorrect announcement from CallPilot with DPNSS to MCDN gateway
Yes	MPLR16944	Q00553156	CallPilot interaction with Call Waiting causes XMI000, AUD017, AUD018, and AUD019
	MPLR17006	Q00615655	**For sites integrated with SCCS**: Obsolete – Use MPLR18165 instead. Give Controlled Broadcast fails if CallPilot IVR TN is within internal loop of Superloop.
	MPLR17066	Q00496916	M3900-series/i2054 telset softkeys invalid on active call when using Alternate User Interface. PEP disables soft-key display and functionality.
Yes, Note 2	MPLR17074	Q00595929	BUG241 and ATTN cannot release call to CallPilot after MCDN TRO (only happens on Loop keys other than 0)
Yes, Note 1	MPLR17193	Q00617481	BUG6071 for ACD agents. Merges fixes from MPLR12907 and MPLR13010.
	MPLR17304	Q00595645 Q00643979	MWI lamp turns off on a 3904 Taurus set for MHO that has unread voice Messages
	MPLR17700	Q00543550	**For sites integrated with SCCS**: Delay in playing voice prompts

Recommended	PEP #	CR #	Description
Yes, Note 2	MPLR17779	Q00386764 Q00595929	Merge PEPs MPLR16528 and MPLR17074
	MPLR18025	Q00573831	User Unknown in CallPilot if MCDN TRO activated
	MPLR18122	Q00743832	Improper greeting received for calls that terminate to CallPilot and then thru-dial to set that is CFW'd back to CallPilot.
Note 3	MPLR18136	Q00636076 Q00661044 Q00743832	Merge of MPLR17274 (part of DEPAK 16001a), MPLR17369, and MPLR18122.
	MPLR18165	Q00615655	**For sites integrated with SCCS:** Merge MPLR17006 and MPLR17323
	MPLR18765	Q00660974 Q00893081	**For sites integrated with SCCS:** BERR705/INI and ELAN007/ELAN014 errors when SCCS or CallPilot is rebooted.
Note 4	MPLR18804	Q00874849	**(PI)** Switch rejecting CallTransfer message from CallPilot resulting in Call Sender or Transfer failing to external calls. (Replaces MPLR15156). *** No-charge PI PEP for CallPilot sites only.
	MPLR18842	Q00826558	External callers that go into CallPilot and then thru-dial out to DN that is hard-CFW'd back to CallPilot receive incorrect BUSY prompt from the hard-CFW'd set's Mailbox.
	MPLR19463	Q01001942	**For sites integrated with SCCS:** Extra CallOffered messages from SCCS causing phantom calls and could lead to ring-no-answer condition.

Notes:

1. PEP MPLR17193 incorporates the fixes from and replaces PEPs MPLR12907, MPLR13010, and MPLR17429.
2. PEPs MPLR16528 and MPLR17074 do not need to be installed if compilation PEP MPLR17779 is applied.
3. PEP MPLR18136 only applies under certain call scenarios where DNIS is involved.
4. PEP MPLR18804 obsoletes PEP MPLR15156.
5. PEP MPLR18122 only applies under certain call scenarios where DNIS is not involved.

3.4.2 X11 Release R25.40B PEPs for CallPilot

These PEPs are for CallPilot support on all M1 systems running X11 R25.40B.

Recommended	PEP #	CR #	Description
Note 1	MPLR12907	MP01724	Obsolete – use MPLR17193 instead. CallPilot Ring-No-Answer ACD audit recovery workaround. This PEP is used in conjunction with MPLR13010.
Note 1	MPLR13010	TM17734	Obsolete – use MPLR17193 instead. CallPilot ring-no-answer (agent not idle) generic solution (includes parts p13010a6, p13010b6). This PEP is used in conjunction with MPLR12907.
	MPLR15156	MP10913	**(PI)** Revert from CallPilot to 1800 number fails if 1800 number is serviced by AT&T Central Office (via direct or tandem switch) and no answer supervision is provided. AT&T is non-compliant to ISDN specification.
Yes	MPLR15504	Q00337504 Q00351952 Q00743357 Q00755241 Q00776038 Q00839574	CallPilot on hold by attendant is mishandled, crosstalk occurs. CallPilot answering while on-hold interrupts active call. Attendant lockup after transferring call to phantom DN which DCFW to CallPilot
	MPLR15788	MP15257	Hot Line to CallPilot fails with "Your call cannot be completed…" message
	MPLR16214	MP17255	DISA call can't NCFW to CallPilot
	MPLR16351	MP17013	**For sites integrated with SCCS**: Automatic Agent login (ALOG) cannot be invoked
	MPLR16660	Q00460124	**For sites integrated with SCCS**: CallPilot 2.02 not passing call control back to SCCS 4.2 server.
	MPLR16867	Q00548995	Incorrect announcement from CallPilot with DPNSS to MCDN gateway
Yes	MPLR16944	Q00553156	CallPilot interaction with Call Waiting causes XMI000, AUD017, AUD018, and AUD019
	MPLR16968	Q00550207	**Restricted PI PEP (contact GNTS to obtain)** Originally dialed digits not sent to messaging systems for calls routed through SCCS acquired CDNs
	MPLR17006	Q00615655	**For sites integrated with SCCS**: Obsolete – Use MPLR18165 instead. Give Controlled Broadcast fails if CallPilot IVR TN is within internal loop of Superloop.
	MPLR17066	Q00496916	M3900-series/i2054 telset softkeys invalid on active call when using Alternate User Interface. PEP disables soft-key display and functionality.
Yes	MPLR17074	Q00595929	BUG241 and ATTN cannot release call to CallPilot after MCDN TRO (only happens on Loop keys other than 0)
Yes, Note 1	MPLR17193	Q00617481	BUG6071 for ACD agents. Merges fixes from MPLR12907 and MPLR13010.

Recommended	PEP #	CR #	Description
	MPLR17304	Q00595645 Q00643979	MWI lamp turns off on a 3904 Taurus set for MHO that has unread voice Messages
	MPLR17577	Q00703786	Wrong DN passed to CallPilot when SCCS command "ROUTE TO" directs call to DN that is Hunt/CFW back to CallPilot
	MPLR17606	Q00711098	SCCS call is routed to set on PBX which then FNA, HUNT, or CFW to CallPilot, incorrect "Originally Dialed DN" is sent CallPilot in ICC message
	MPLR17700	Q00543550	**For sites integrated with SCCS**: Delay in playing voice prompts
Yes, Note 2	MPLR17779	Q00386764 Q00595929	Merge PEPs MPLR16528 and MPLR17074
	MPLR18025	Q00573831	User Unknown in CallPilot if MCDN TRO activated
Note 6	MPLR18122	Q00743832	Improper greeting received for calls that terminate to CallPilot and then thru-dial to set that is CFW'd back to CallPilot.
Notes 3 and 5	MPLR18136	Q00636076 Q00661044 Q00743832	Merge of MPLR17274 (part of DEPAK 16001a), MPLR17369, and MPLR18122.
	MPLR18165	Q00615655	**For sites integrated with SCCS:** Merge MPLR17006 and MPLR17323
	MPLR18765	Q00660974 Q00893081	**For sites integrated with SCCS:** BERR705/INI and ELAN007/ELAN014 errors when SCCS or CallPilot is rebooted.
Note 4	MPLR18804	Q00874849	**(PI)** Switch rejecting CallTransfer message from CallPilot resulting in Call Sender or Transfer failing to external calls. (Replaces MPLR15156). *** No-charge PI PEP for CallPilot sites only.
	MPLR18842	Q00826558	External callers that go into CallPilot and then thru-dial out to DN that is hard-CFW'd back to CallPilot receive incorrect BUSY prompt from the hard-CFW'd set's Mailbox.
	MPLR19463	Q01001942	**For sites integrated with SCCS:** Extra CallOffered messages from SCCS causing phantom calls and could lead to ring-no-answer condition.

Notes:

1. PEP MPLR17193 incorporates the fixes from and replaces PEPs MPLR12907, MPLR13010, and MPLR17429.
2. PEPs MPLR16528 and MPLR17074 do not need to be installed if compilation PEP MPLR17779 is applied.
3. PEPs MPLR18136 and MPLR18842 only apply under certain call-transfer scenarios where DNIS is involved.
4. PEP MPLR18804 obsoletes PEP MPLR15156.
5. PEP MPLR18136 conflicts with PEP MPLR17274 contained within DepList Pack 10 (MPLR16001a). If DepList Pack 10 is installed, a manual workaround is required to install PEP MPLR18136. Refer to MPLR16001 "Notes" for details.
6. PEP MPLR18122 only applies under certain call scenarios where DNIS is not involved.

4 Communication Server 1000 switch requirements

Communication Server 1000 (a.k.a. Succession 1000) is a communications system that provides a single solution for telephony and data capabilities. Communication Server 1000 provides a full suite of industry-leading voice features and uses global software. The software stream used on a Communication Server 1000 is X21, which delivers software with equivalent features and functionality to Meridian 1 X11 25.30 and later. This software stream provides the same seamless integration between CallPilot and Communication Server 1000 as between CallPilot and Meridian 1.

4.1 CallPilot Platforms Supported

- 201i IPE
- 703t Tower
- 1002rp Rackmount

Please refer to NTP 555-7101-510 *CallPilot Installation and Configuration Guide – Part 3 – Succession 1000 and CallPilot Server Configuration,* for further details on Communication Server 1000 and the installation and configuration of CallPilot with this switch.

4.2 Software Releases supported

- X21 release 3.0
- CallPilot 3.0 with the CallPilot Integration/Connectivity Code: NTZE39JB

4.3 X21 Packages required for CallPilot 3.0

Pkg #	Description
41	ACDB (ACD Package B)
46	MWC (Message Waiting Center)
214	EAR (Enhanced ACD Routing)
215	ECT (Enhanced Call Treatment)
218	IVR (Hold in Queue for IVR)
247	Call ID
324	NGEN (CallPilot Connectivity) See next table
364	NMCE (CallPilot)
254	PHTN (Phantom TN)

Package 324 requirements	
Pkg #	**Description**
77	CSL (Command Status Link)
153	X25AP (Application Module Link – AML)
164	LAPW (Limited Access to Overlays)
242	MULI (Multi-User Login)
243	Alarm Filtering
296	MAT (Meridian Administration Tool)

All the above software packages are already included in the Communication Server 1000 *Basic Software Service* package. However, if you also need the CallPilot Network Message Service (NMS) feature, you need to order either the *Advanced Software Service* package or the *Premium Software Service* package.

4.4 X21 PEPs to support CallPilot 3.0

These PEPs are for CallPilot support on all CS 1000 systems running X21 R03.00.

Recommended	PEP #	CR #	Description
	MPLR17933	Q00716984	**(PI)** Tandem call failure on hunt to CDP entry with TRO-BA
	MPLR18025	Q00573831	User Unknown in CallPilot if MCDN TRO activated
Note 1	MPLR18122	Q00743832	Improper greeting received for calls that terminate to CallPilot and then thru-dial to set that is CFW'd back to CallPilot.
Note 2	MPLR18136	Q00636076 Q00661044 Q00743832	Merge of MPLR17274 (part of DEPAK 16001a), MPLR17369, and MPLR18122.
	MPLR18765	Q00660974 Q00893081	**For sites integrated with SCCS:** BERR705/INI and ELAN007/ELAN014 errors when SCCS or CallPilot is rebooted.
	MPLR18804	Q00874849	**(PI)** Switch rejecting CallTransfer message from CallPilot resulting in Call Sender or Transfer failing to external calls. (Replaces MPLR15156). *** No-charge PI PEP for CallPilot sites only.
Note 2	MPLR18842	Q00826558	External callers that go into CallPilot and then thru-dial out to DN that is hard-CFW'd back to CallPilot receive incorrect BUSY prompt from the hard-CFW'd set's Mailbox.
	MPLR19463	Q01001942	**For sites integrated with SCCS:** Extra CallOffered messages from SCCS causing phantom calls and could lead to ring-no-answer condition.

Notes:

1. PEP MPLR18122 only applies under certain call scenarios where DNIS is not involved.
2. PEPs MPLR18136 and MPLR18842 only apply under certain call-transfer scenarios where DNIS is involved.

5 CallPilot software

5.1 CallPilot CD suite

The table below identifies the CDs contained in the CallPilot 3.0 Software packages. Ensure you have the full set of CDs prior to performing any maintenance activity.

PEC	CPC	Label	Version	Date	Notes
NTUB50BA	N0002819	201i Platform 3.0 Image (2 CD set)	03.03.06.02	20-Oct-04	1
NTUB50EA	N0002825	703t Platform 3.0 Image (2 CD set)	03.03.06.02	12-Oct-04	1
NTUB50FA	N0002826	1002rp Platform 3.0 Image (2 CD set)	03.03.06.02	12-Oct-04	1
NTUB40AG	A0550943	3.0 Applications CD	03.03.06.02	12-Oct-04	
NTUB50AA	N0002818	3.0 Service Update / PEP CD			
NTUB41AF	A0518669	2.5 Desktop Messaging software/updates CD	02.50.06.17	02-Nov-04	4
NTUB48AC	A0518670	2.5 My CallPilot software/updates CD	02.50.06.23	20-Sep-04	4
NTUB44AE	A0510778	2.x Language Prompts – Americas (1 of 3)	02.01.27.06	04-Nov-03	2
NTUB44BE	A0510779	2.x Language Prompts – EMEA (2 of 3)	02.01.23.13	06-Aug-04	2
NTUB44CE	A0510780	2.x Language Prompts – Asia/Pac (3 of 3)	02.01.23.13	06-Aug-04	2
NTRG19AH		3.0 Documentation CD (English)			
NTRG19BG		3.0 Documentation CD (non-English)			

Notes:

1. Which platform-image CDs are shipped, NTUB50BA, NTUB50EA, or NTUB50FA depends on which platform was ordered.
2. Updated language CDs will be made available periodically as language localization completes. Refer to the Language Availability table for details. Language CDs are interchangeable for use with all 2.x and 3.x servers.
3. Desktop Messaging CD version 2.50.06.17 contain support for localized languages (refer to Localized Media table for details.
4. My CallPilot CD version 2.50.06.22 and later contain support for localized languages (refer to Localized Media table for details)

5.2 Default Passwords

CallPilot servers are shipped from the factory with the Windows 2003 Operating System and CallPilot application software pre-installed with the default passwords listed below. These default passwords also apply if re-installing CallPilot software via the "Image" CDs.

Description	Account	Default Password
Windows Administrator	Administrator	Bvw_250!#
CallPilot system	Ngensys	Bvw_250!#
CallPilot Distributor	Ngendist	Bvw_250!#
CallPilot Manager	000000	124578
pcAnywhere	CallPilotDist	<configured by installer>

Note: Sites using a non-North American (US) keyboard, may encounter issues when initialing attempting to log into the server. To overcome this, enter the password using keystrokes similar to a US-keyboard. For example, when entering "Bvw_250!#", use shift-3 to indicate the "#" character.

Note: When logging into an account, or running Configuration Wizard for the first time, you must change the passwords.

Note: Strong passwords have been enabled for Windows 2003 accounts (NGenSys, NGenDesign, NGenDist, and Administrator). When you change these passwords using Configuration Wizard, you can no longer use simple passwords. As with all accounts, it is highly recommended that strong passwords be utilized.

A strong password contains a minimum of six characters and includes a mixture of uppercase, lowercase, symbols, and numerals. For example: J*p2leO4>F.

5.3 CallPilot Service Updates/PEPs

At the time of this printing the following additional PEPs are available for download.

5.3.1 Individual PEPs

PEP number	Description
CP300S00G10C	CallPilot Manager (03.03.06.03) – Required for use with CallPilot 3.0
CP300S00G09S	Multi-component Server Update (Obsoletes PEP CP300S00G01S)
CP300S00G01A	Application Builder client (0303.06.02) for use with CallPilot 3.0

5.3.2 Limited Distribution PEPs (platform specific)

At the time of this printing, no additional CallPilot "Limited Distribution" PEPs are available for download.

5.3.3 Server Security PEPs

At the time of this printing, no additional CallPilot "Security Update" PEPs are available for download. For a list of those individual Microsoft Security Updates (hotfixes) that apply to CallPilot 3.0 servers running the Windows 2003 Operating System, refer to Product Bulletin P-2003-0277-Global or the published Product Advisory Alerts.

6 Feature Limitations

6.1 Language Availability

At the time of this printing, CallPilot 3.0 provides support for the following languages:

Region (CD version)	Language filename	Language
Americas (2.01.27.06)	Lang1046	Brazilian Portuguese
	Lang1033	English (American)
	Lang4105	English (Canadian)
	Lang3084	French (Canadian)
	Lang3082	Latin American Spanish
EMEA (2.01.23.13)	Lang1025	Arabic
	Lang6	Danish
	Lang1043	Dutch (Standard)
	Lang2057	English (Female European)
	Lang6153	English (Irish)
	Lang11	Finnish
	Lang1036	French (Standard)
	Lang1031	German (Standard)
	Lang15	Hebrew
	Lang1040	Italian
	Lang1044	Norwegian
	Lang25	Russian
	Lang1034	Spanish (European)
	Lang29	Swedish
Asia/PAC (2.01.23.13)	Lang3076	Cantonese
	Lang3081	English (Australian)
	Lang17	Japanese
	Lang1028	Mandarin Chinese (Taiwan)
	Lang2052	PRC Mandarin

6.2 Speech Activated Messaging and Custom Commands

The Speech Activated Messaging and Custom commands features are currently only supported using North American English and Canadian English languages (found on the Americas language CD) and German (found on the EMEA language CD).

The following Speech Activated Messaging and Custom Commands languages remain on controlled release. The language CDs will be up-issued at a later date:

- Euro French
- UK English
- Italian
- Japanese

6.3 Meridian Mail Migration

Migration from Meridian Mail systems to CallPilot 3.0 is supported using the Meridian Mail migration utility tape NTUB25AB (available within NTUB24AC Migration Package). This supports migration from all Meridian Mail MM11, MM12, and MM13 releases for all Meridian Mail platforms **except the MSM and Card Option running MM13.11.2**. It is required for all Meridian Mail releases including MM13.14 as this tape supersedes the migration utility available in the TOOLS level.

Notes:

- Previous 1.07 versions of the migration utility NTUB24AA or NTUB24AB cannot be used with CallPilot 3.0. The Migration guide should be consulted for limitations.
- It is highly recommended the latest documentation be referenced when performing a migration. At the time of this printing, refer to NTP 555-7101-801 Meridian Mail to CallPilot Migration Utility Guide, Release 3.0, Standard 1.0, dated November 2004.
- The Mailbox Number is a unique identifier on both the Meridian Mail and CallPilot voice mail systems. If the migration utility encounters a CallPilot mailbox with the same number as a Meridian Mail mailbox, then the utility will overwrite the existing mailbox in order to avoid a duplicate.
- CallPilot requires use of the NTRB18CA MGate card for connectivity. Systems migrated from Meridian Mail must ensure only the updated MGate cards are used.

7 Procedures

If you are setting up a server that has been shipped from the factory it will already have the Windows 2003 Operating System and CallPilot application software installed. In this case you need to follow the instructions listed in section 7.2 "Fresh Install – CallPilot Server" in order to complete the configuration of the CallPilot server.

If you are installing CallPilot 3.0 (03.03.06.02) from image CDs on an existing server, then you need to start with section 7.1 "Installing from Image CD – Disaster Recovery". Once you have installed the image of the operating system and CallPilot you then need to follow the instructions in section 7.2 "Fresh Install – CallPilot Server" in order to complete the configuration of the CallPilot Server.

For a list of default user accounts and passwords required for these steps, refer to section 5.2 "Default Passwords"

7.1 Installing from Image CD – Disaster Recovery

7.1.1 Tower (703t) / Rackmount (1002rp) platform:

Note: If the server was not shipped from the factory with CallPilot 3.0 pre-installed, in order to automatically activate the Windows 2003 O/S, CallPilot 3.0 requires an updated BIOS on the 1002rp and an updated BIOS and firmware on the 703t. If the updates are not done CallPilot will still work, however the O/S will have to be manually updated within 30 days or the system will be disabled and will have to be installed from the image again.

1. Disconnect the CLAN network cable.
2. Power on the server.
3. Insert the CallPilot 03.03.06.02 Image CD – Disk 1 that is appropriate for the platform type that is being recovered into the CD-ROM drive.
4. Set the BIOS to boot from CD-ROM.
5. When the server boots from the CD-ROM, select option 1 "Install CallPilot server image for 703T/1002rp, reboot…" and press <Enter>.
6. Enter "Y" to start restoring the image when the warning is displayed that this will overwrite all of the data on the system
7. You may be prompted for one or two additional CD-ROMs depending on the size and number of hard drives in the server. When prompted "Insert media and press Enter to continue", remove current CD and insert the next CD and then press <Enter>.
8. The imaging program will automatically install a fresh image of the operating system, CallPilot software, plus additional 3rd party software on the server.
9. The server will automatically reboot after the image has been applied.
10. Remove the CD from the CD-ROM drive.
11. The server will now start the Windows 2003 mini-setup process. During this time the server will automatically reboot several times as the Windows 2003 configuration is finalized.
12. After the last reboot sequence, the message appears: "Your CallPilot server needs to be configured. If you have PEPS to install, please install them now. If you have already installed your PEPs, please run Config Wizard.".

The server is now in the same state as when it shipped from the factory. In order to complete the recovery you must configure the server and then restore a system backup from tape.

7.1.2 IPE (201i) platform:

Note: If the server was not shipped from the factory with CallPilot 3.0 pre-installed, 201i servers require a new BIOS version (6.0.3) in order for Windows 2003 to run correctly. The BIOS should be upgraded before installing CallPilot 3.0 / Windows 2003 from a CallPilot Image CD. Please refer to Appendix C: Updating the 201i BIOS on the procedure that should be followed.

1. Disconnect the CLAN network cable.
2. Power on the server.
3. Insert the CallPilot 03.03.06.02 Image CD – Disk 1 into the CD-ROM drive.
4. Set the BIOS to support DOS devices:
   4.1. Enter the BIOS setup program by pressing F2 at the "Press F2 to enter SETUP" prompt.
   4.2. Use the left/right arrows to select "Advanced".
   4.3. Use the up/down arrows to select "Installed O/S:".
   4.4. Use the +/- keys to change the value to "Other".
   4.5. Press <F10>.
   4.6. Select "Yes" to confirm that the changes should be served.
   4.7. After the server reboots, enter 'Y' when prompted if you want to Boot ROM-DOS.
   4.8. In the ROM-DOS menu, select "1. SCSI CD-ROM" by entering 1 and pressing <Enter>.
   4.9. At the A:\ command prompt navigate to Z:\ and run image.bat to start the imaging process.
5. When the server boots from the CD-ROM, select option 1 "Restore system images, reboot" and press <Enter>.
6. Enter "Y" to start restoring the image when the warning is displayed that this will overwrite all of the data on the system
7. You may be prompted for one or two additional CD-ROMs depending on the size and number of hard drives in the server. When prompted "Insert media and press <Enter> to continue", remove current CD and insert the next CD and then press Enter.
8. The imaging program will automatically install a fresh image of the operating system, CallPilot software, plus additional 3rd party software on the server.
9. Remove the CD from the CD-ROM drive.
10. The server will automatically reboot after the image has been applied.
11. The server will now start the Windows 2003 mini-setup process. During this time the server will automatically reboot several times as the Windows 2003 configuration is finalized.
12. After the last reboot sequence, the message appears: "Your CallPilot server needs to be configured. If you have PEPs to install, please install them now. If you have already installed your PEPs, please run Config Wizard.".

The server is now in the same state as when it shipped from the factory. In order to complete the recovery you must configure the server and then restore a system backup from tape.

7.2 Fresh Install – CallPilot Server

Notes:

- This assumes that the server was shipped from the factory (with the operating system and CallPilot was installed).
- In order to prevent the spread of viruses you should not connect a server to the CLAN until you have anti-virus software installed.

1. Power on the server. Let the mini-setup run until you are prompted to log in to Windows 2003.
2. Log in to the server. The default password for the administrator, NGenSys, NGenDist, and NGenDesign accounts are all set to Bvw_250!#.
3. Install any PEPs / SUs on the server. Reboot the server if required.
4. Launch Internet Explorer
   Note: When you launch IE for the 1st time the "New Connection Wizard" will be displayed. You can either complete the wizard or exit the wizard and re-launch Internet Explorer.
   Note: When you launch IE, you may also get a box that says "M/S IE Enhanced Security config is currently enabled on your server. This advanced level of security...reduces risk..." It is suggested that the security level should be lowered. It is not recommended to check the box to not show the message again. If you do so and try and access a web site off the server that it may be blocked by the security setting and you will get no warning only a blank screen
5. Log in to CallPilot Manager and run Config Wizard to configure the server using either "localhost" or the default server name (CallPilot). The default admin mailbox (000000) password is 124578.
   Note: When the language CD is placed in the drive, the Windows message is displayed 'What to do with the disk'. Select 'Take No Action' and check the 'Always do the selected action' button and click "OK".
6. After running Configuration Wizard, reboot the server.
7. Right click on the desktop 'Network' icon, and select 'Properties to configure the appropriate configuration settings (WNS, DNS, etc.).
8. Configure the DNS suffix following these steps:
   a. Right Click on My Computer and click Properties. The System Properties screen will be appear
   b. Select the "Computer Name" tab
   c. Click on the "Change" button
      ATTENTION: Do not change the computer name through this window. Only change the computer name through CallPilot Config Wizard.
   d. Click on the "More" button
   e. Enter the Primary DNS Suffix for the CallPilot server.
      (Example: "ca.nortel.com")
   f. Reboot the server
9. Install anti-virus software from the antivirus application CD (not included with CallPilot or provided by Nortel Networks).
   NOTE: When installing anti-virus software there are specific restrictions on the configuration of the software to ensure that there is no impact on the CallPilot server. Please refer to bulletin P-2003-0151-Global "CallPilot Support for Anti-Virus Applications".

10. Connect to the CLAN. Download virus definition updates.
11. Download and install latest approved security patches / critical updates from Microsoft using the 'Start/Windows Update' menu. Refer to bulletin P-2003-0277-Global "CallPilot Server Security Update"

7.3 Fresh Install / CallPilot Manager Stand-alone web server

1. Insert the CallPilot Applications CD into the CD-ROM drive.
2. Run the cpmgrsetup.exe application located in \CallPilotManagerInstall directory.
3. After the installation is complete apply the workarounds listed below and then reboot the stand alone web server.

7.4 Software re-install

It may be desirable to re-install / uninstall / repair the installation of a component on the CallPilot Server without a complete re-install of the server from image. The following software is available on the CallPilot Applications CD for this purpose.

7.4.1 CallPilot Server Uninstall / Reinstall / Install

The CallPilot Server install / reinstall / upgrade executable (setup.exe) can be found in \CallPilotInstall.

Note: While re-installing the CallPilot software, you may receive a "Windows File Protection" error. You should choose the option to continue using the questionable (from Windows point of view) file.

7.4.2 CallPilot Manager Uninstall / Install

The CallPilot Manager install / reinstall / upgrade executable (cpmgrsetup.exe) can be found in \CallPilotInstall

7.4.3 pcAnywhere 11.0.1 uninstall / install / reinstall

Found in \PCAnywhere11. Need to install both the package 11.0 (CallPilot Support Host Only.exe) and the update 11.0.1 (pca1101.exe) in order for it to work correctly. Can run "change" from the control panel -> Add / Remove programs to repair an existing installation and run "remove" to uninstall. Run the executable CallPilot Support Host Only.exe, follow the on screen instruction, and then run pca1101.exe to reinstall. Default installation directory C:\Program Files\Symantec

7.4.4 Adobe Reader 6 uninstall / install / reinstall

Found in \AdobeReader6. Can run "change" from the control panel -> Add / Remove programs to repair an existing installation and run "remove" to uninstall. Run the executable AdbeRdr60_enu_full.exe, and follow the on screen instruction to reinstall. Default installation directory C:\Program Files\Adobe\Acrobat 6.0

7.4.5 LSI MegaRaid 1600/3200 Power Console + (RAID admin software)

This software is only applicable to the 703t and 1002rp platforms.

Found in \RAID\MegaRaidPowerConsole. Can run "change" from the control panel -> Add / Remove programs to repair an existing installation and run "remove" to uninstall. Run the executable setup.exe, and follow the on screen instruction to reinstall. Default installation directory C:\Program Files\MegaRAID

7.4.6 Sun Java Run Time Environment

The Sun Java run time environment version 1.3.1_11 is included for customers that want to use reporter and are using the Netscape browser, or Microsoft Internet Explorer without a built in Java virtual machine. Found in \Java2RunTimeEnv. Can run "change" from the control panel -> Add / Remove programs to repair an existing installation and run "remove" to uninstall Run the executable j2re-1_3_1_11-windows-i586.exe, and follow the on screen instruction to reinstall. Default installation directory C:\Program Files\JavaSoft\JRE\1.3.1_11

7.5 Upgrade CallPilot from 3.02 to 03.03.06.02 (for Alpha and Beta trial sites only)

1. For 703t Tower and 1002rp Rackmount platforms, perform a RAID consistency check. Begin this several hours in advance of the upgrade.
2. Perform a Full system backup.
3. For 703t Tower and 1002rp Rackmount servers:
    a. Disconnect the CLAN network cable.
    b. Put the CallPilot Image CD – Disk 1 that is appropriate for the platform type that is being recovered into the CD-ROM drive.
    c. Set the BIOS to boot from CD-ROM.
    d. When the server boots from the CD-ROM, select option 3 "Utilities (BIOS, Firmware, etc...)" and press <Enter>.
    e. Choose to "Update firmware for MegaRaid Elite 1600"
    f. Answer by pressing "Y" to the next three prompts which are confirming you are installing the right F/W (111U) onto the RAID card respectively
    g. Allow the F/W to upgrade. At the end the system will prompt for reboot. Once reboot is performed, the F/W upgrade is complete.
    h. Split RAID using CTRL+M utility.
    i. Reconnect the CLAN network cable.
4. Install OS and CallPilot 03.03.06.02 image following the steps in section 7.1 above. After the image is loaded, the system will reboot three times automatically.
5. Copy the d:\nortel\data\tools.tpd file to d:\temp
6. Run configuration wizard, using the same key code and configuration as the backed up system, to configure your system, including setting your computer name and the ELAN and CLAN.
7. Reboot your system after running configuration wizard.
8. Perform a system restore from Start ->Programs->CallPilot -> System Utilities ->Backup Restore tool
9. Copy the file d:\temp\tools.tpd to d:\nortel\data

10. Right click on the desktop 'Network' icon, and set the appropriate configuration settings (WNS, DNS, …).
11. Configure the primary DNS suffix for CallPilot following these steps;
    a. Right Click on My Computer and click on properties. The System Properties screen will appear
    b. Select the "Computer Name" Tab
    c. Click on the "Change" Button
       ATTENTION: Do not change the computer name through this window. Only change the computer name through CallPilot Config Wizard.
    d. Click on the "More" Button
    e. Enter the Primary DNS Suffix for the CP Server
12. If you have an anti-virus CD, re-install anti-virus software at this time.
    NOTE: When installing anti-virus software there are specific restrictions on the configuration of the software to ensure that there is no impact on the CallPilot server. Please refer to Appendix A
13. Download and install latest security patches / critical updates from Microsoft using the 'Start/Windows Update' menu.
14. Reboot your system
15. If features being used with CallPilot 3.03 are same as CallPilot 3.02, and computer name, ELAN, CLAN and switch configuration are the same as before, then the upgrade is done.
16. If features being used with CallPilot 3.03 are different from CallPilot 3.02, or computer name, ELAN, CLAN and switch configuration are different from before, then configuration wizard needs to be run again. After running configuration wizard, reboot system.
17. Note: When the system comes up after the new image has been loaded, the 'Start' toolbar at the bottom of the screen may be hidden. By placing your cursor at the bottom of the screen, the double sided 'resize' arrow should appear. Left click and drag the cursor up to display the toolbar. You can then right click on the toolbar and select 'Lock the toolbar' option.

7.6 Change in location of various Windows OS-centric utilities

In Windows 2003, Microsoft has relocated many OS-centric utilities that may be used for installation, configuration, or maintenance of the CallPilot server. The following highlights those commonly used utilities and how to access then in Windows 2003

- **Event Viewer:** Start > Programs > Administrative Tools > Event Viewer
- **Disk Management:** Start > Programs > Administrative Tools > Computer Management
- **Device Manager:** Start > Programs > Administrative Tools > Computer Management
- **Local Users and Groups:** Start > Programs > Administrative Tools > Computer Management
- **Services:** Start > Programs > Administrative Tools > Services
- **Computer Name:** <Use Configuration Wizard>. Do not change the computer name via the Operating System otherwise database inconsistencies may result.

8 Known Problems / Issues

8.1 Open CRs

As of the time of this printing, the following are Open P1-P2 CRs:

CR Number	Priority	Description
Q00915994	1	CallPilot is interrupted by Low Virtual Memory
Q00878489	1	CallPilot 201i blue screen occurs during a reboot the server
Q00906730	2	Memory leak in load test
Q00859741	2	Cannot access Event Browser and Alarm Monitor from CallPilot Manager
Q00920062	2	Tape Drivers are not installed on CallPilot 201i
Q00900868	2	Incorrect RAID card driver on 1002rp and 703t images
Q00900388	2	Unable to use pcAnywhere to connect to CallPilot Server via the modem
Q00897251	2	CallPilot Manager should not allow operations on an un-configured CallPilot server
Q00897117	2	Restore deleted users got web page problem

8.2 Server

8.2.1 Intermittently server will not come into server

Occasionally after a server install or reboot the server will not come into service (i.e. None of the channels will come up). This may be caused by an AML communications problem. If there are no events in the Windows NT System event log from the AML_TSP indicating that the TSP has started you are experiencing the problem.

Workaround: Re-start the switch that the CallPilot server is connected to.

8.2.2 Server OS Activation

If the server does not have the correct release of the BIOS / firmware, the O/S requires activation after the image is installed. If the system is not activated within 30 days it will have to be installed from the image again. If after installing an image you adjust the date past the 30 day activation period the system will lock and you will have to activate it or install it from an image again.

Workaround: Ensure the system has the appropriate BIOS/Firmware versions

8.2.3 Using Wrong Image CD

Using the wrong image CD on a server (i.e. 201i on a 1002rp) will cause unpredictable results i.e. the image will install but the system may not work correctly.

Workaround: Only use CallPilot Image CDs that correspond to the matching platform type.

8.2.4 Blue Screen after updating device drivers

Using the Windows Device Manager to update or uninstall the MPB drivers will cause a blue screen.

Workaround: Only use documented NTP procedures for updating any device drivers.

8.2.5 Unable to restore archive from earlier TRIAL release

User archives from previous releases (03.01.04.00 or older) can not be restored on this release. User data structures were changed to prevent potential data corruptions. Currently, Backup and Restore does not have a version associated with each archive or backup. Therefore, if a user archive from previous release is selected to restore, Backup and Restore will attempt to restore and report the restore operation fail.

8.2.6 Unable to change password via Configuration Wizard

When the "Finish" button is clicked, at the last page in Configuration Wizard dialog, the server is updated with all new information provided by user. During this phase, the Configuration Wizard will try to update the password, but could fail, due to the Windows 2003 security policy ("Minimum Password Age") if the policy value is set to 1.

Workaround: Adjust the Windows 2003 security policy for Minimum Password Age to a timeframe greater than one (1).

8.2.7 "No Dongle Found" error after installation

Very intermittently, you may receive a "No Dongle Found" error after installing a 201i server.

Workaround: Reboot the server.

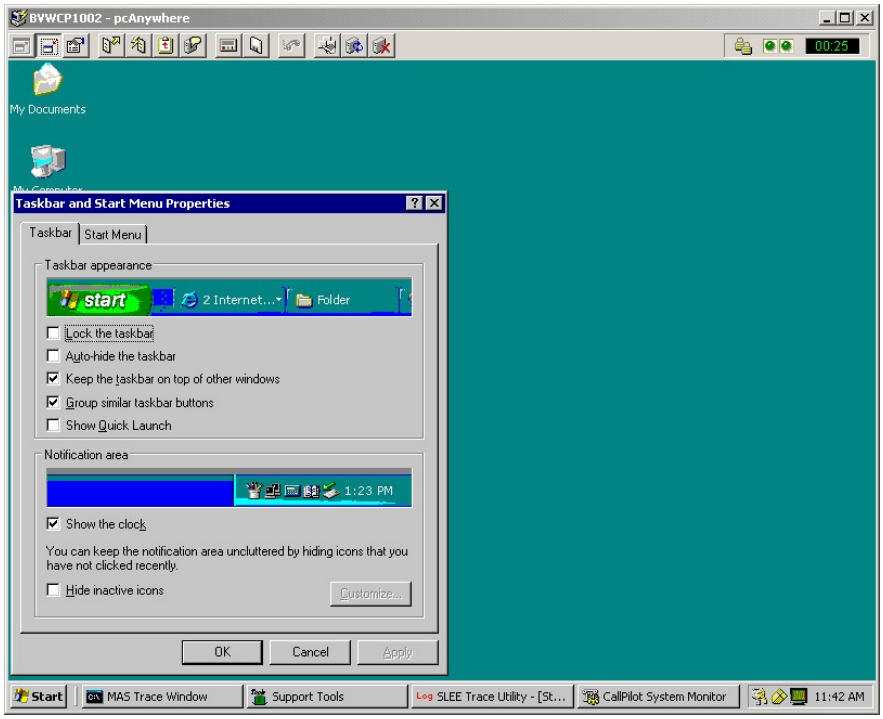
8.2.8 "RDP Protocol Component – Data Encryption" error

When trying to connect to a 201i from a desktop using Microsoft Remote Desktop, the following error "The RDP Protocol component "DATA ENCRYPTION" detected an error in the protocol stream and has disconnected the client." may occur which may block connecting to the server.

Workaround: Refer to Microsoft Knowledge Base article KB323497 at the following URL http://www.support.microsoft.com/?kbid=323497

8.2.9 Taskbar Menu pops up or MAS window appears in center of screen

Whenever the MAS window is minimized, the Taskbar Menu pops up as indicated (see below). Additionally, sometimes closing the Taskbar Menu results in the MAS window appearing in the center of the screen again. This behavior is primarily observed when using pcAnywhere. Refer to CR # Q00947757.



8.2.10 Windows Task Bar appears to be missing

When the system is first powered up following a new install, the mini-setup will run for a period of time and then reboot. Once the system reboot has completed, you will be able to log into the system using one of the CallPilot Windows usernames. Once logged in, the Windows taskbar may appear to be missing but is only hidden at the bottom of the console window. Refer to CR # Q01008560.

Workaround: To make the taskbar visible, use your mouse pointer and left mouse button to grab the task bar and pull it up to the desired height.

8.2.11 List Tape function is too slow

When using the CallPilot Backup and Restore tool, List Tape function may take a long time to respond. This may occur if the tape was not re-tensioned or rewound after a full system backup was completed and the tape left in the drive.

Workaround: Remove the tape from the tape drive and re-insert. This will rewind the tape to the beginning.

8.2.12 Remote Disk backup to network share takes excessively long time

When performing remote disk backups to a network share, if the LAN configuration is invalid, the backup may still complete successfully, but may take a longer period of time.

Workaround: To ensure the NIC is configured appropriately, use the following steps:

1. Click Start->Settings->Network Connections
2. Right-click on the NIC Card and click on Properties. The CLAN (or ELAN) Properties screen will appear.

3. Click on the Configure... Button. The Network Connection screen will appear.
4. Select the Advance Tab
5. For 703t and 1002rp:
    a. Highlight Link Speed and Duplex then select the required setting from the Value Drop-down Box on the right. Default value is Auto-Detect.
6. For 201i:
    a. Highlight Duplex then select the required setting from the Value Drop-down Box on the right. Default value is Auto-Detect.
    b. Highlight Speed then select the required setting from the Value Drop-down Box on the right. Default value is Auto-Detect.

8.2.13 Unable to log into Windows

Sites using a non-North American (US) keyboard, may encounter issues when initialing attempting to log into the server entering strong passwords. This is the result of all CallPilot images being configured to use a US-keyboard layout by default. To overcome this, use the workaround listed below. Refer to CR # Q01023414.

Workaround: To overcome initial login issues with keyboard layout, enter the password using keystrokes similar to a US-keyboard. For example, when entering "Bvw_250!#", use shift-3 to indicate the "#" character.

To avoid any other keyboard layout issues, use the following steps:

1. Launch the "Regional and Language Options" applet from the Control Panel (Start Menu -> Settings -> Control Panel -> Regional and Language Options).
2. In the "Regional and Language Options" dialog, change to the Languages tab.
3. Click on the Details button.
4. In the "Text Services and Input Languages" dialog, click on the Add button.
5. In the "Add Input Language" dialog, select the appropriate keyboard layout and/or input language, and then click on the OK button.
6. In the "Text Services and Input Languages" dialog, change the default input language to the newly added language, then click on the OK button.
7. In the "Regional and Language Options" dialog, then click on the OK to exit.

8.2.14 CallPilot server freezes after a restart

Very intermittently, the CallPilot server may freeze after initiating a restart using <Ctrl-Alt-Del>. Refer to CR # Q01018679.

Workaround: If this condition occurs, rebooting the server a second time will clear the condition. A PEP is expected to be available in the Dec-2004 timeframe.

8.3 CallPilot Manager

8.3.1 Unable to log into CallPilot Manager

Symptom #1: After installing CallPilot Manager, unable to log in using default user-ID and password.

Symptom #2: When trying to browse the ASP login page for CallPilot Manger from a stand-alone web-server, you may receive "HTTP 500 – Internal server error" in the browser window. As well, the following error messages below may be shown in the event logs. Refer to CR # Q00964877:

> Source: DCOM
> Event ID: 10010
> User: NT AUTHORITY\SYSTEM
> Description: The server {3D14228D-FBE1-11D0-995D-00C04FD919C1} did not register with DCOM within the required timeout. This error message is followed in the event log by a warning message like the following.
>
> Source: W3SVC
> Event ID: 36
> User: N/A
> Description: The server failed to load application 'cpmgr'. The error was "Server execution failed".

CAUSE
The NT AUTHORITY\Authenticated Users or NT AUTHORITY\INTERACTIVE entries have been removed from the Users group.

RESOLUTION
Add these users back to the Users group, and then restart Internet Information Services (IIS) using the following steps:

1. Click **Start**, click **Programs**, click **Administrative Tools**, and then click **Computer Management** to open the Computer Management console.
2. In the left pane, expand **Local Users and Group**s, and then click the **Groups** folder.
3. In the right pane, right-click the **Users** group, and then click **Properties**.
4. Click **Add**.
5. In the **Select Users or Groups** dialog box, locate the **Look in** drop-down box, and then select the local computer.
6. Select **Authenticated Users**, and then click **Add**. Select **INTERACTIVE**, and then click **Add**. Click **OK**, click **Apply**, and then click **Close** to close the properties for the Users group.
7. In the left pane, expand **Services and Applications**, and then click **Services**.
8. In the right pane, right-click **IIS Admin Service**, and then click **Restart**.
9. In the **Restart Other Services** confirmation dialog box, click **Yes**.

8.3.2 Unable to log into CallPilot Manager due to unknown password

Access to CallPilot Manager requires the user to have an Administration account/password. If the default Administration Password (mailbox "000000", password "124578") has been changed and forgotten or misplaced, a utility exists with CallPilot 3.0 for resetting it to the default.

Workaround: Use the following procedure to reset the default administrator password.

1. Log in to "Distributor" Support Tools on the CallPilot Server
   Start → Programs → CallPilot → System Utilities → Support Tools
2. From the main menu, select (9) Database Utilities
3. From the Database Utilities menu, select (3) Database API Utility
4. At the CI> prompt, type "resetadminpwd" and press <Enter>
5. At the CI> prompt, type "quit". This will close the API Utility
6. In the main menu, press <Enter>, then select (1) to exit.

The default Administration mailbox "000000" password will be reset to "124578"

8.3.3 HTTP 500 error when using Auto Admin on 1002rp Rackmount

In CallPilot Manager, using Auto Admin to add users, or importing wave (.WAV) files for greeting may fail on 1001rp Rackmount platforms returning a HTTP 500 error. This problem is due to an invalid IIS user account with improper credentials on the 201i and 703t images. Refer to CR # Q00945920.

Workaround: To correct this user account permission issue, complete the following steps. A server reboot is required.

7. Open Windows Explorer
8. Go to C:\inetpub\wwwroot\cpmgr\AutoAddFiles
9. Right click on the AutoAddFiles folder
10. Go to Sharing and Security
11. Click on Security Tab
12. Click on Add button, then click on Advanced button, then click on "Find Now".
13. Select the IUSR_YOUR-N32X1YNB1I account
14. Click OK twice to add this account
15. Under permissions for Internet Guest Account, check "Allow" for modify permission. The write permission should automatically become "Allowed" as well. Click OK.
16. Complete this same procedure to add the IUSR_YOUR-N32X1YNB1I account for the C:\inetpub\wwwroot\cpmgr\Upload folder.
17. Once complete, shutdown and restart the server.

Note: Do not simply delete the IIS user account. It will be automatically populated and the same fault condition will exist. This can only be corrected by modifying the folder permissions as outlined above.

8.3.4 Remote Disk backup fails if share name contains sub-folders

Remote Disk backup may fail if the network share name uses sub-folders. This is a known issue within 03.03.06.02 and will be addressed in a future SU, PEP, or release.

Workaround: Configure backup device using Universal Naming Convention (UNC) and with root-level access. Examples:

Good device: \\servername\sharename
Bad device: \\servername\sharename\backupfolder\

8.4 Event Monitor/Viewer

8.4.1 Events 2, 3, 4, 8, and 9 appear in System Event logs

When accessing the CallPilot server via a Remote Desktop, Events 2, 3, 4, 8, and 9 may appear in the System Event log. These events reference LAN printers even though no print action was performed by the user. Refer to CR # Q00943668.

Workaround: Discontinue using Remote Desktop or simply disregard the events. They have no known impact to CallPilot.

8.5 Desktop Messaging

8.5.1 Address Book download and Fax DTT/DTF fails

Several functions that use TCP/IP within CallPilot require DNS to be properly to function. For example, from the Desktop client, download of the address book and/or delivery of fax may fail if the primary DNS suffix is incorrect. Refer to CR # Q00943541

Workaround: Adjust the CallPilot server DNS configuration using the steps below to correct this condition.

1 Right Click on My Computer and click on properties. The System Properties screen will appear
2 Select the "Computer Name" Tab
3 Click on the "Change" Button
ATTENTION: Do not change the computer name through this window. Only change the computer name through CallPilot Config Wizard.
4 Click on the "More" Button
5 Enter the Primary DNS Suffix for the CallPilot server. Example: "ca.nortel.com"
6 Reboot the server

8.5.2 "Invalid Credentials" error received when logging in

Intermittently, when logging in via the Desktop client, user receives "Invalid Credentials" error. This known problem may occur when the password is due to expire. Refer to CR # Q00966310.

Workaround: To resolve the issue, log into the mailbox via the telset and change the password to avoid the password expiry warning. When logging in via the Desktop client, ensure the client is configured for the new password as changed from the telset or that the "Remember Password" box is un-checked so the user is prompted for the new password.

8.6 Application Builder

No known problems/workarounds at the time of this printing.

8.7 Networking

8.7.1 VPIM Networking fails to deliver message

VPIM Networking requires all TCP/IP settings be configured correctly. It may fail to deliver messages successfully if the primary DNS suffix configuration is missing or invalid. Refer to CR # Q00943541

Workaround: Adjust the CallPilot server DNS configuration using the steps below to correct this condition.

1. Right Click on My Computer and click on properties. The System Properties screen will appear
2. Select the "Computer Name" Tab
3. Click on the "Change" Button
   ATTENTION: Do not change the computer name through this window. Only change the computer name through CallPilot Config Wizard.
4. Click on the "More" Button
5. Enter the Primary DNS Suffix for the CallPilot server. Example: "ca.nortel.com"
6. Reboot the server

9 PEP/Service Update application overview

Performance Enhancement Packages (PEPs) and Service Updates (SUs) are software fixes or updates that enhance CallPilot features and operation. CallPilot PEPs generally deliver individual fixes while Service Updates contain more comprehensive updates. As PEPs/SUs are delivered periodically, it's recommended the Meridian Enterprise Solutions PEP Library (ESPL) website be checked regularly to ensure the latest updates are applied.

The most recent PEPs for CallPilot 3.0 can be found on the Nortel Networks Enterprise Solutions PEP Library (ESPL) website at: http://www.nortelnetworks.com/espl (all regions)

Note: If you are new to the ESPL website, you will need to register for a user ID/password. Please apply on-line at http://www.nortelnetworks.com or contact your local Nortel Networks Channel Partner Account Manager.

9.1 PEP Numbering Format

The PEP numbering format for server PEPs includes supplemental information for which Service Update they apply to using format: CPRRRSSSXYYZ:

Where:

RRR:	Software Release (eg. 3.00, 2.02, 2.50)
SSS:	The required SU level required to apply the PEP Example: (S01 = Service Update 01)
X:	The type of PEP: (G)eneral, (R)estricted, (L)imited, or (D)iagnostic.
YY:	The PEP number (1-99).
Z:	The component that is being PEPed / updated: (S)erver, (C)allPilot Manager, (A)pplication Builder, (M)y CallPilot, or (D)esktop client.

The CallPilot server is the only component that will have small PEPs. Other components may have PEPs released, but the PEP will really contain an updated version of the software package. The following list summarizes the different components and how they are PEPed:

CallPilot Server:	PEPS
CallPilot Manager:	Software update
Reporter:	Packaged as part of CallPilot Manager software update
My CallPilot:	Software update
Desktop:	Software update

9.2 Available CallPilot PEPs

At the time of this printing, the following additional PEPs are generally available:

PEP number	CR Number	Description
CP300S00G10C	CallPilot Manager (03.03.06.03) – Required for use with CallPilot 3.0	
	Q00589940	Desktop requires Networking in keycode
	Q01013384	Unable to display all events from Event Browser in CallPilot Manager
CP300S00G01A	Application Builder client (03.03.06.02) for use with CallPilot 3.0	
CP300S00G09S	Multi-component Server Update (Obsoletes PEP CP300S00G01S)	
	Q00859007	LDAP SSL
	Q00966310	Desktop login problem (when password warning occurs)
	Q01002510	Nbnot.exe error after reboot (affects MWI notification)
	Q00991166-01	IMA service is consuming 100% CPU usage
	Q00987148-01	IVR channels are not correctly displayed in Channel Monitor
	Q01017361	Cannot use the Remote Disk Backup to Subfolders
	Q00999036	Unable to open locked applications after installing SU03 ,17S and 22s on 2.02

9.3 Available CallPilot "Limited Distribution/Restricted" PEPs

At the time of this printing, no additional CallPilot "Limited Distribution" PEPs are available for download.

9.4 Available CallPilot "Security Update" PEPs

At the time of this printing, no additional CallPilot "Security Update" PEPs are available for download.

Appendix A : CallPilot/SCCS Integration

CallPilot 3.0 / Symposium Call Center Server 4.2 Integration checklist

The following items should be reviewed to ensure proper integration between Symposium Call Center Server 4.2 and CallPilot 2.02 for Voice Services.

Software pre-requisites:

1. SCCS 4.2 with PEP NS040206SU07S or later
2. CallPilot 3.0 (03.03.06.02)
3. Minimum Meridian 1 X11 (25.40) or Communication Server 1000 (release 3.0) or later with the following software packages:

		CallPilot		SCCS	
Pkg	**Description**	**X11**	**X21**	**X11**	**X21**
35	IMS – Integrated Message Service	*		*	*
40	Basic Automatic Call Distribution	*		*	*
41	ACDB (ACD Package B)	*	*	*	*
42	ACDC (ACD Package C)			*	*
43	LMAN – ACD Load Mgt Reports			*	*
45	ACDA (ACD Package A)	*		*	*
46	MWC – Message Waiting Center	*	*		
50	ACDD (ACD Package D)			*	*
77	CSL – Command Status Link	*	*	*	*
83	CDRQ – ACD CDR Queue Record	*			
98	DNIS – Dialed Number Identification Service	opt			
111	TOF – ACD Timed Overflow Queuing	*			
114	AUXS – ACD Pkg D, Aux Security			*	*
153	X25AP – Application Module Link – AML	*	*	*	*
155	ACDNT – ACD Account Code			*	*
164	LAPW – Limited Access to Overlays	*	*		
175	NMS – Network Message Service	opt	opt		
209	MLM – Meridian Link Modular Server			*	*
214	EAR – Enhanced ACD Routing	*	*	*	*
215	ECT – Enhanced Call Treatment	*	*	*	*
218	IVR – Hold in Queue for IVR	*	*	*	*
242	MULI – Multi-User Login	*	*		
243	Alarm Filtering	*	*		
247	Call-ID (for AML Applications)	*	*	*	*
254	Phantom TN	*	*		
296	MAT – Meridian Administration Tool	*	*		
311	NGCC – Nortel Symposium Call Center			*	*
324	NGen (MAS Connectivity)	*	*	*	*
364	NMCE (CallPilot)	*	*		

Note: The software packages listed above may be included as components in other X11/X21 packages. They are provided here individually for reference only. Refer to the ordering bulletins for each associated product for additional information.

Meridian1/CS 1000/1000M PEPs specific for CallPilot/SCCS Integration:

Product	Software Version/Release	PEP Number
SCCS	04.02.06	NS040206CPSU07S or later
CallPilot	03.03.06.02	
Meridian 1 (X11 software)	25.40	MPLR16351
		MPLR16660
		MPLR17700
		MPLR18165
		MPLR18765
		MPLR19463
	25.40B	MPLR16351
		MPLR16660
		MPLR16968 (note)
		MPLR17700
		MPLR18165
		MPLR18765
		MPLR19463
Communication Server 1000 (X21 software)	3.0	MPLR18765
		MPLR19463

Note: At the time of this printing, all previously available individual PEPs are included in the latest CallPilot server release.

For the latest SU/PEPs available, refer to the Enterprise Solutions PEP Library (ESPL) website at http://www.nortelnetworks.com/espl.

Note: MPLR16968 only applies to 25.40B and is a restricted PEP. It addresses the problem where originally dialed digits are not sent to for calls routed through SCCS acquired CDNs.

Documentation available:

1. NTP 555-7101-222: CallPilot 3.0 Installation and Configuration Guide, Part-3 Meridian 1 and CallPilot Server Configuration Guide
2. NTP 555-7101-510: CallPilot 3.0 Installation and Configuration Guide, Part-3 Succession 1000 and CallPilot Service Configuration Guide
3. NTP 555-7101-801: Meridian Mail to CallPilot Migration Utility Guide (if migrating voice prompts) (Standard 2.0, dated May-2004 is latest)
4. Symposium, M1/CSE1000 Voice Processing Guide

Note: The Partner Information Center / Helmsman Express documentation website contains the above documents. Ensure the latest versions are utilized when integrating both solutions.

- For CallPilot documentation, from the main product screen, select "Meridian 1 and Communication Server 1000 Systems" and under Applications select "CallPilot Release 3.0 (CallPilot_30).
- For Symposium documentation, from the main product screen, select "Symposium" and under Applications select "Symposium Call Center Server Release 4.2 CPI".

PBX configuration guidelines:

1. VAS/SECU setting for both CallPilot and SCCS ELAN/VAS-ID should YES
2. CallPilot agents segregated for SCCS support should be build w/ Class of Service: CLS-MMA and AST

Additional general notes:

1. **Recording Voice Prompts using telephone set requires Desktop Messaging License**
   The recording of Voice Prompts using a telephone set on CallPilot currently requires the Desktop Messaging application to be installed with appropriate licensing. Customers requiring this capability and not having Desktop Messaging should contact their Nortel Networks prime to resolve this issue.

2. **Calls receiving GIVE IVR ring indefinitely when CallPilot Server out of service**
   SCCS will attempt to perform the GIVE IVR operation if specified in the scripts even if the CallPilot Server with the voice ports for IVR processing is powered down. In this case, calls will hear ringing but will not be provided voice services and will not advance in the SCCS script. Refer to CR # Q00503343 and Q00465763.

   Customers should ensure that the scripts are modified not to provide voice services if the CallPilot Server is out of service. An alternative solution is to manually log out the voice ports on the switch if the CallPilot server is shut down.

   Workaround: During shutdown of the CallPilot server, to ensure the proper MLINK messages are sent from CallPilot to SCCS and that voice services channels are properly logged out; ensure Meridian 1/Communication Server 1000 Release 1.1 PEP MPLR16351 has been applied.

3. **Stop/Start of voice channels on CallPilot requires action on SCCS**
   If voice channels are stopped and re-started using CallPilot Manager (through Channel Monitor or Maintenance Admin), they will not resume voice processing until they have been de-acquired and re-acquired through the SCCS Client.

   Customers should avoid stopping and starting the voice channels. If this action is necessary, the voice ports should be de-acquired and re-acquired through the SCCS Client Voice Ports window.

4. **GIVE CONTROLLED BROADCAST fails, returning only silence**
   The Give Controlled Broadcast script command does not currently operate properly when the CallPilot 2.02 and SCCS 4.2 systems are installed on the Communication Server 1000 switch running Release 2.02 or some Meridian 1 systems using Superloops. Callers will hear silence rather than the specified voice segment if this script command is employed.

   Workaround: To resolve this issue, install the appropriate PBX PEP. For Meridian 1 systems, install PEP MPLR17006.

5. **ACCESS channels remain in an un-initialized state if CallPilot reboots before SCCS MLink service is started.**

   If the MLINK service is not up prior to the CallPilot system completing its initialization, the ACCESS channels will be put into an un-initialized state. Without manual intervention, the access channels will remain in an un-initialized state. From lab tests, SCCS takes approximately four (4) minutes to bring up the MLink service.

   Workaround: Defer the boot start time on CallPilot for five (5) minutes after SCCS starts its boot sequence. This can be done through the WinNT Operating System setting:

   On the CallPilot server, from Control Panel → System → Startup/Shutdown. In "System Startup" set "Show list for" to 300 seconds. This will delay the CallPilot boot-up for five (5) minutes, giving SCCS time to boot first.

   What works with the workaround (5 minute delay to boot start of CallPilot):
   With both systems powered down (SCCS and CallPilot):
   a. Both CallPilot and SCCS can be powered up at the same time
   b. Both CallPilot and SCCS can survive an unattended power outage, assuming that both systems are attached to the same power source.

   What does not work with the workaround:
   a. During the first power-up of CallPilot, the workaround will not be applied. Therefore, cannot power up SCCS and CallPilot at the same time, for the first time.
   b. With a functional network (SCCS, CallPilot, and Meridian 1 / CS 1000)
   c. CallPilot rebooting in a 3-5 minute window prior to the SCCS rebooting.

6. **Migrating voice prompts from Meridian Mail requires additional steps**
   When migrating SCCS voice prompts, ensure the additional steps as outlined in NTP 555-7001-801 Meridian Mail to CallPilot Migration Utility Guide are completed prior to attempting to use those prompts within SCCS scripts.

7. **SCCS requires VOICE channels for integration**
   While CallPilot offers three channel types (Voice, Fax, and Speech Recognition), SCCS and CallPilot require dedicated voice channels for integration. As Voice channels utilize only a single MPU per channel, use of Voice channels is the most cost-effective resource, similar to that of the Meridian Mail "BASIC" and "FULL" service channels.

   To avoid conditions where no voice is presented, and to ensure the integration utilizes the most cost-effective resources, ensure that all channels that are to be used for SCCS voice services are dedicated voice channels.

8. **SCCS unable to acquire resources after improper shutdown/crash.**
Symposium Call Center Service (SCCS) acquires devices such as TNs and ACD agent phone-sets on the Meridian 1/Communication Server 1000. If the server crashes or is shutdown without running the shutdown utility, these devices will remain acquired. This can cause a number of problems including:

    1. If the SCCS has a problem such that it cannot de-acquire one or more devices, then these devices cannot be used by other applications until a switch SYSLOAD is performed.
    2. After the switch INIT, CDN count might be corrupted for an application link.

    In these (and possibly other) occasions, it is required to forcibly de-acquire resources from the Meridian 1/Communication Server 1000. Some commands have been developed as tools to perform these tasks, such as:
    - De-acquire all acquired devices of application over a specified ELAN link
    - De-acquire an acquired Agent TN
    - De-acquire an acquired Route of a Customer
    - De-acquire an acquired CDN
    - De-acquire an acquired ACDDN.

    The commands to de-acquire each of the resources are:
    From Overlay 48 (LD 48):
    1. De-acquire an acquired "AGENT":
       DACR AGT <Loop> <Shelf> <Card> <Unit><CR>
    2. De-acquire an acquired "ROUTE":
       DACR RTE <Route#> <Customer#><CR>
    3. De-acquire "ALL" acquired devices on a specified link:
       DACR ALL <Link#><CR>

    From Overlay 23 (LD 23):
    4. De-acquire an acquired "CDN":
       REQ <DACR>
       TYPE <CDN>
       CUST <Customer#>
       CDN <XXXX>
    5. De-acquire an acquired "ACDDN":
       REQ <DACR>
       TYPE <ACD>
       CUST <Customer#>
       ACDN <XXXX>

You can use overlays such as 10, 11, 20, 21, or 23 to confirm the action is carried out successfully on your device.

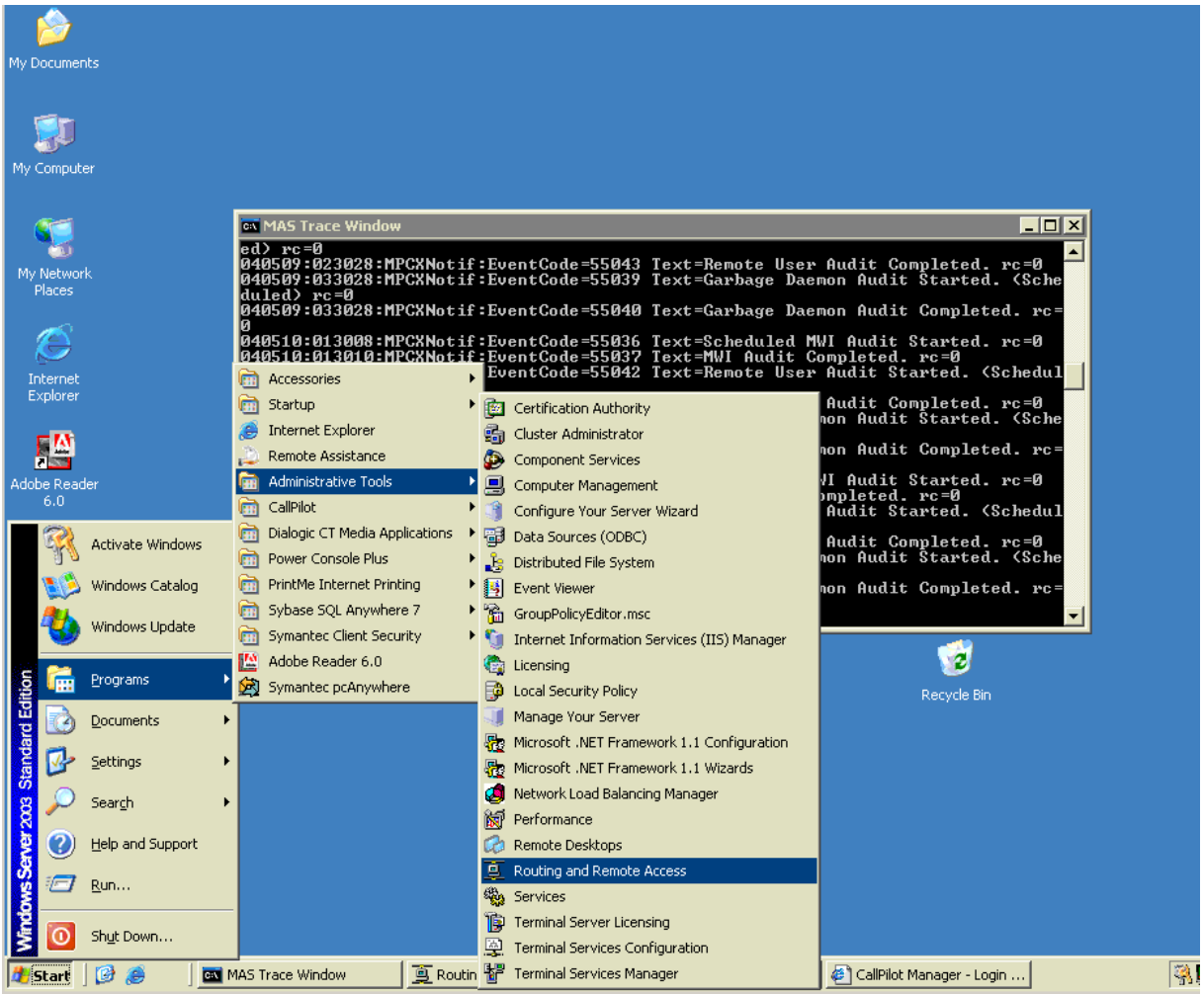
Appendix B : RRAS configuration

The following appendix is for configuring and adding users to Routing and Remote Access (RRAS).

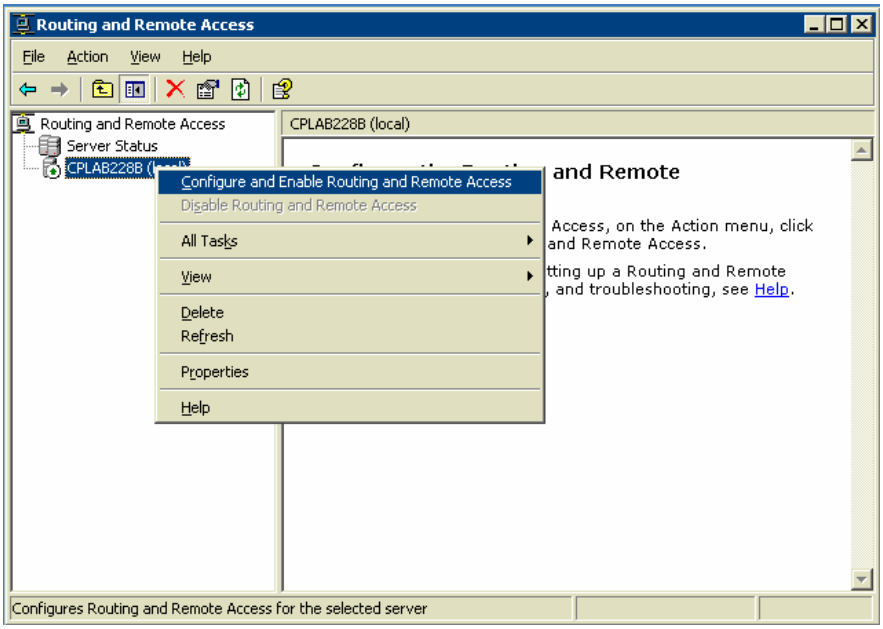
Note: CallPilot (build 03.03.06.02) now includes the RRAS configuration and the following steps are no longer required. The information below is for reference purposes only.

Enable RRAS:

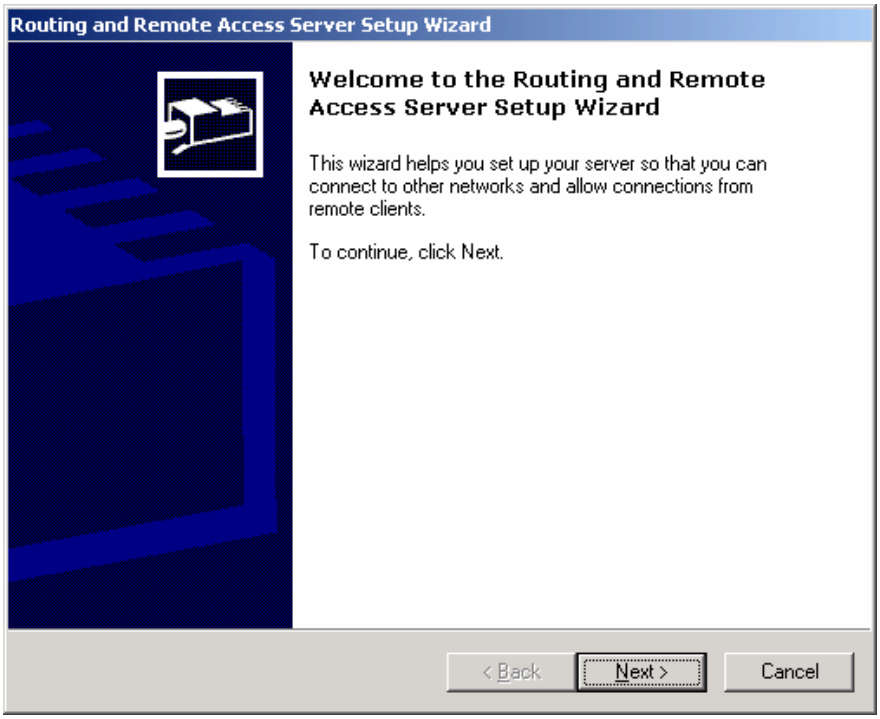
1. Launch the Routing and Remote Access (RRAS) manager:
   (Start -> Administrative Tools -> Routing and Remote Access).



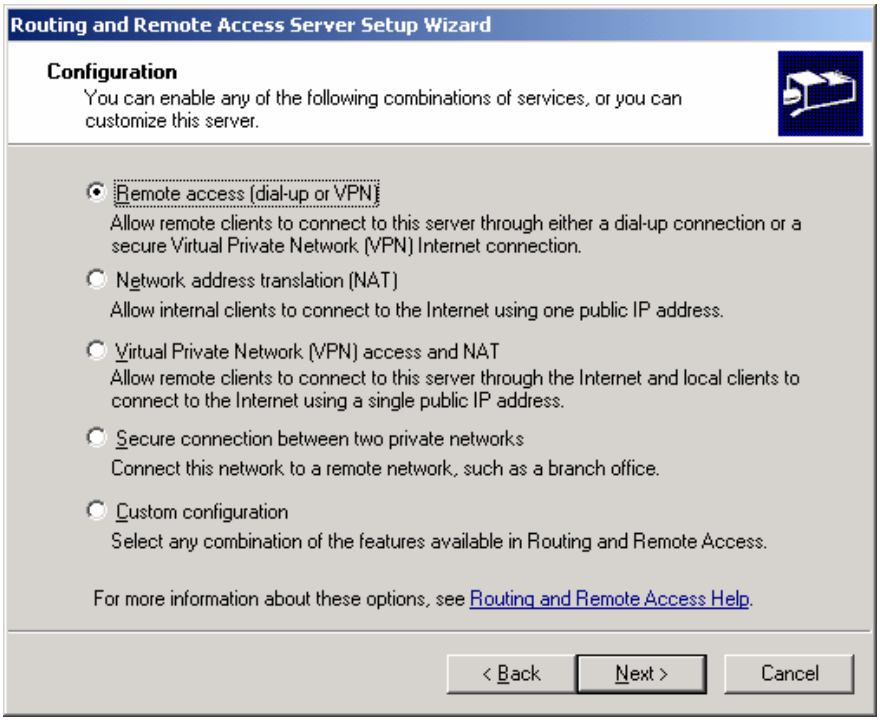
2. Select the server, right click and select "Configure and Enable Routing and Remote Access" from the context sensitive menu.



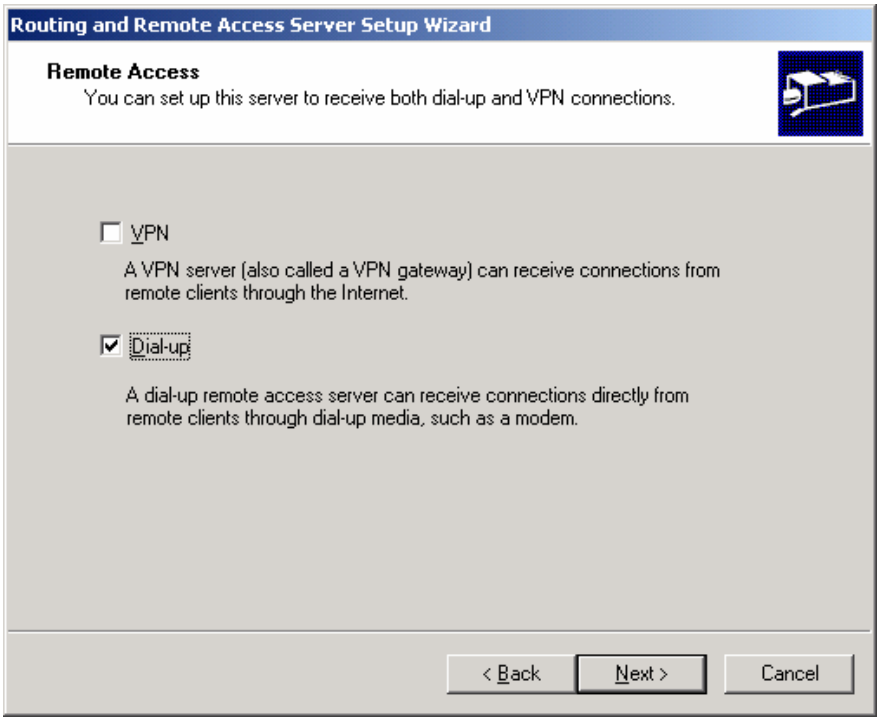
3. The RRAS setup wizard will launch. Click on **Next** to begin the configuration.



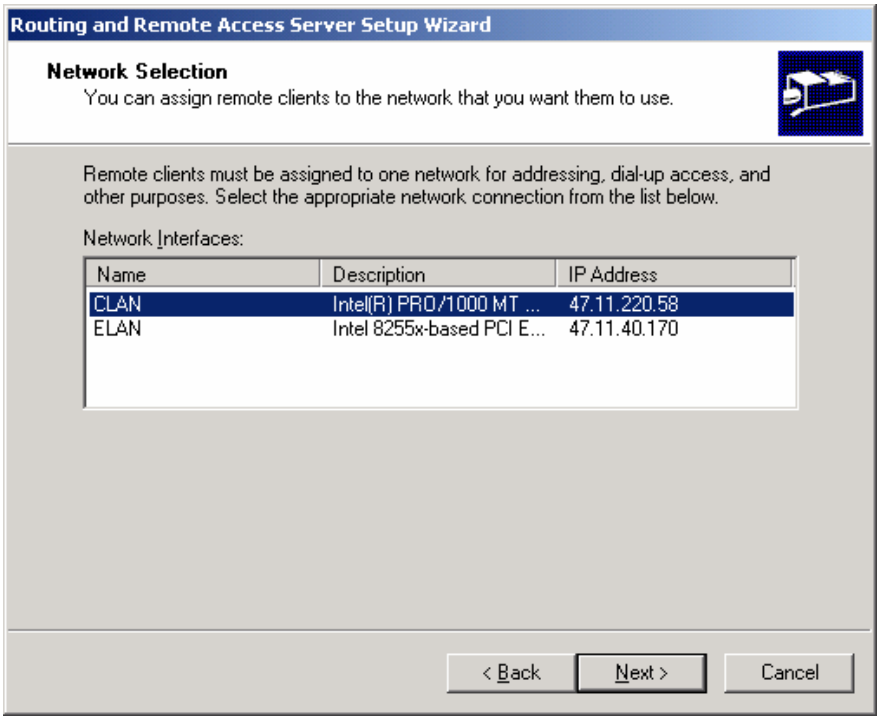
4. Select “Remote access (dial-up or VPN), and click **Next**.



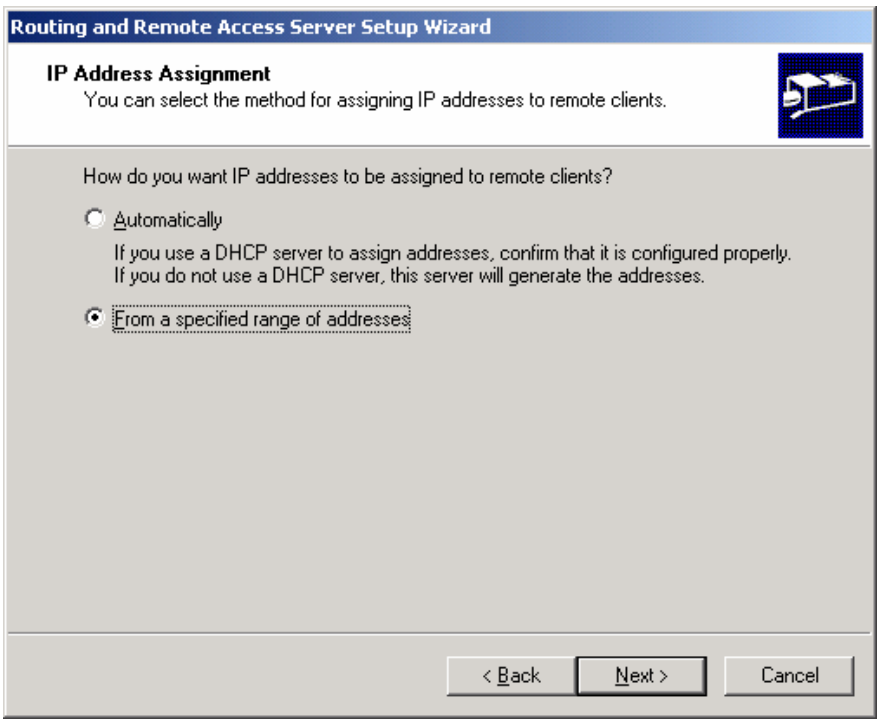
5. Select Dial-up and click **Next**.



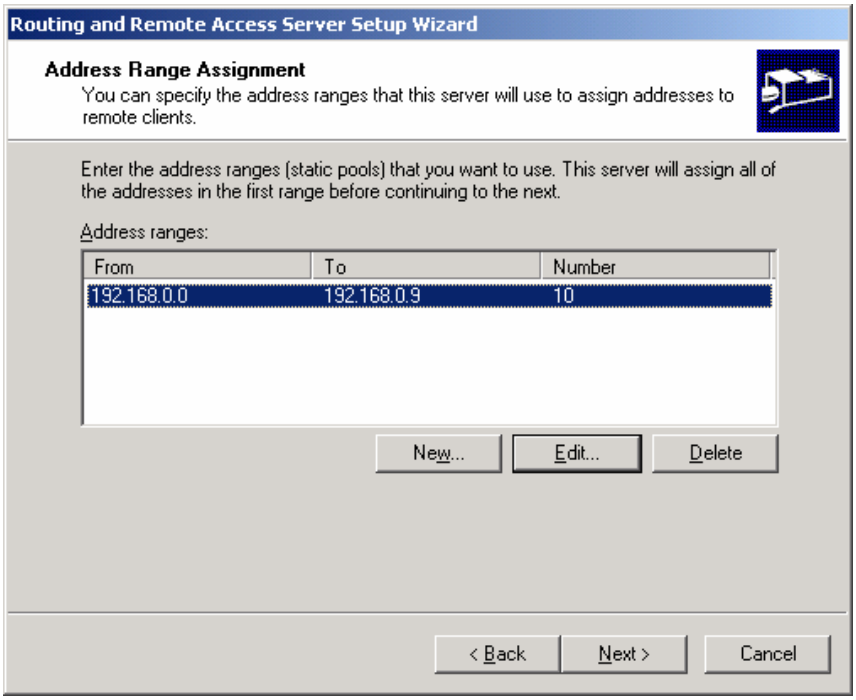
6. Select remote clients that should be assigned to the network connection with the name CLAN and click **Next**.



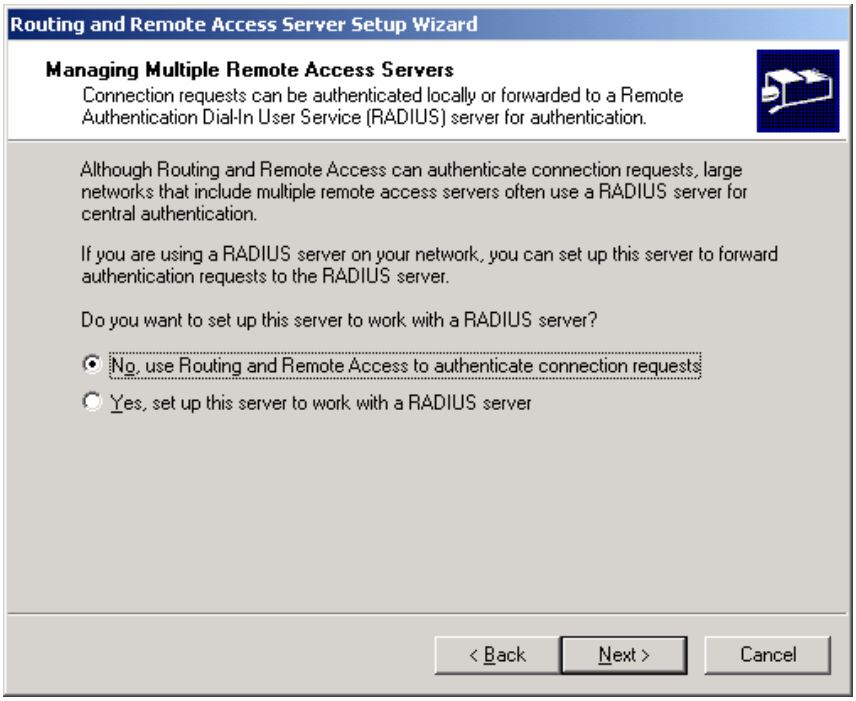
7. Select to assign IP addresses from a specified range and click **Next**.



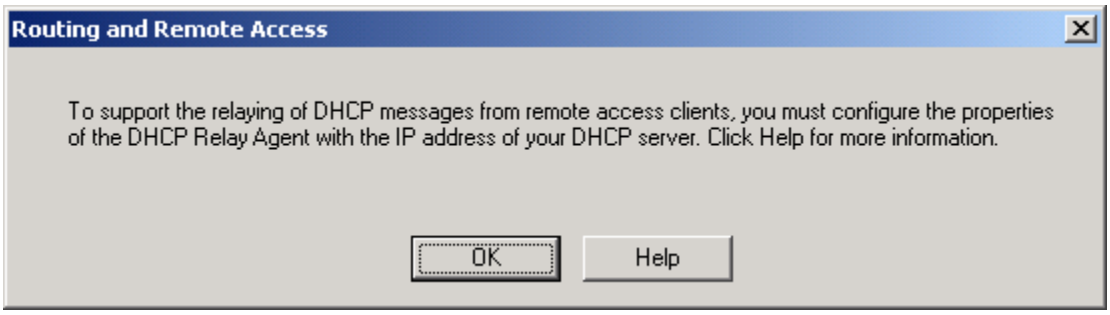
8. Add a new range from 192.168.0.0 to 192.168.0.9, and then click **Next**.



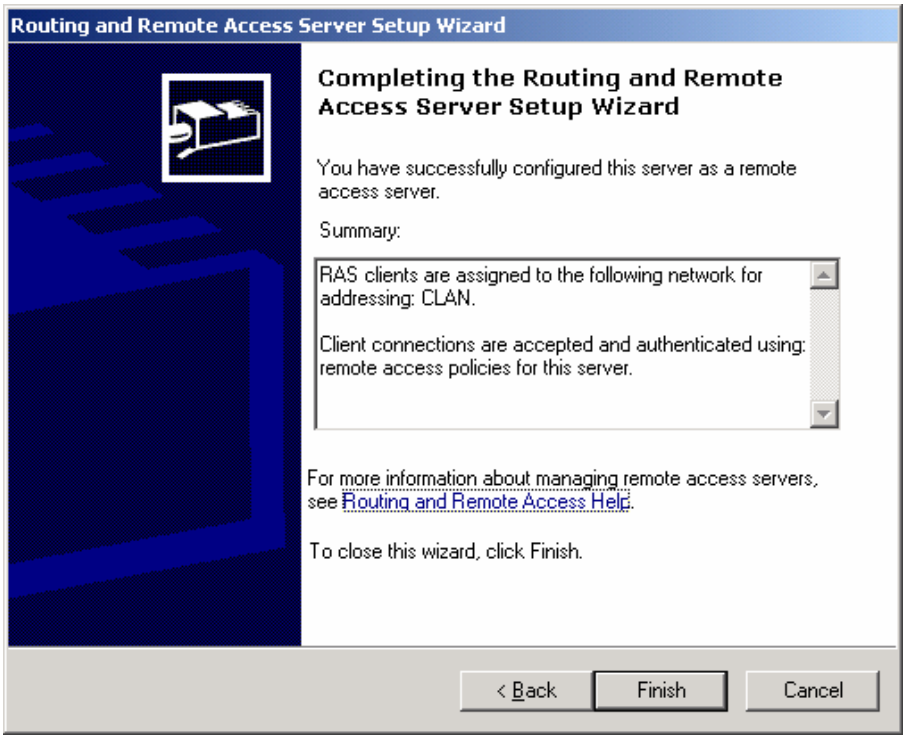
9. Select that connection requests should be authenticated locally (do not use a RADIUS server, and click **Next.**



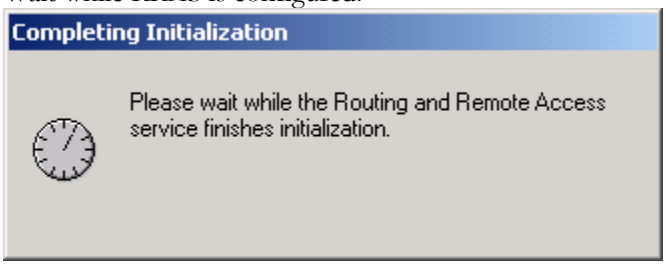
10. Click **OK** to continue.



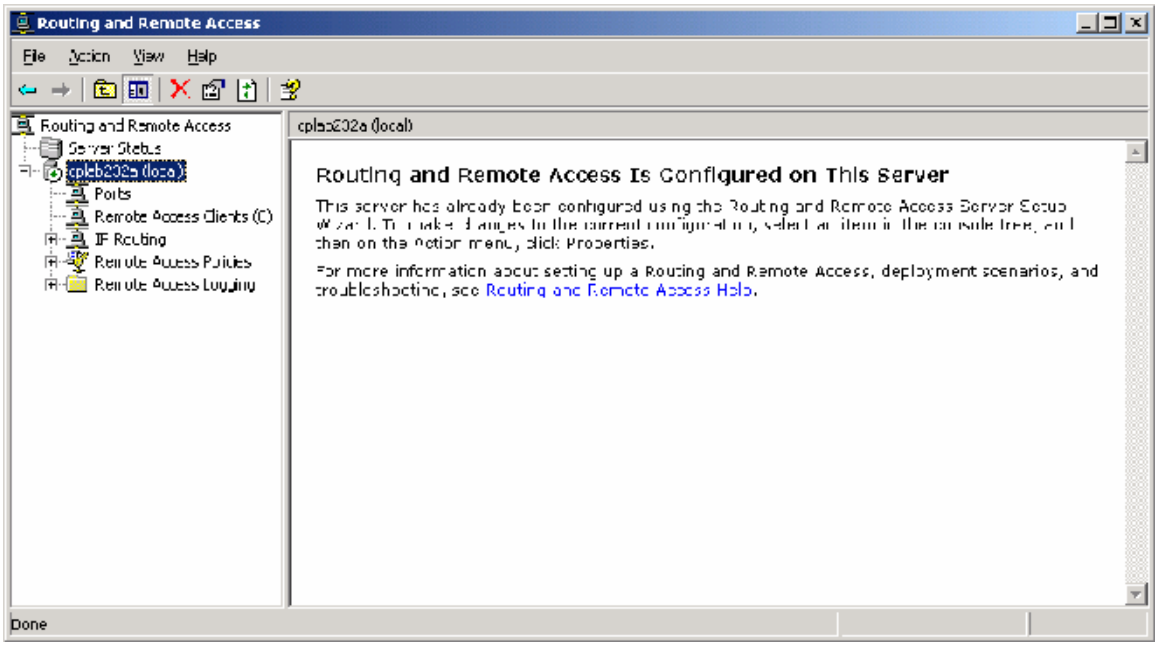
11. Click on **Finish** to apply the configuration.



12. Wait while RRAS is configured.

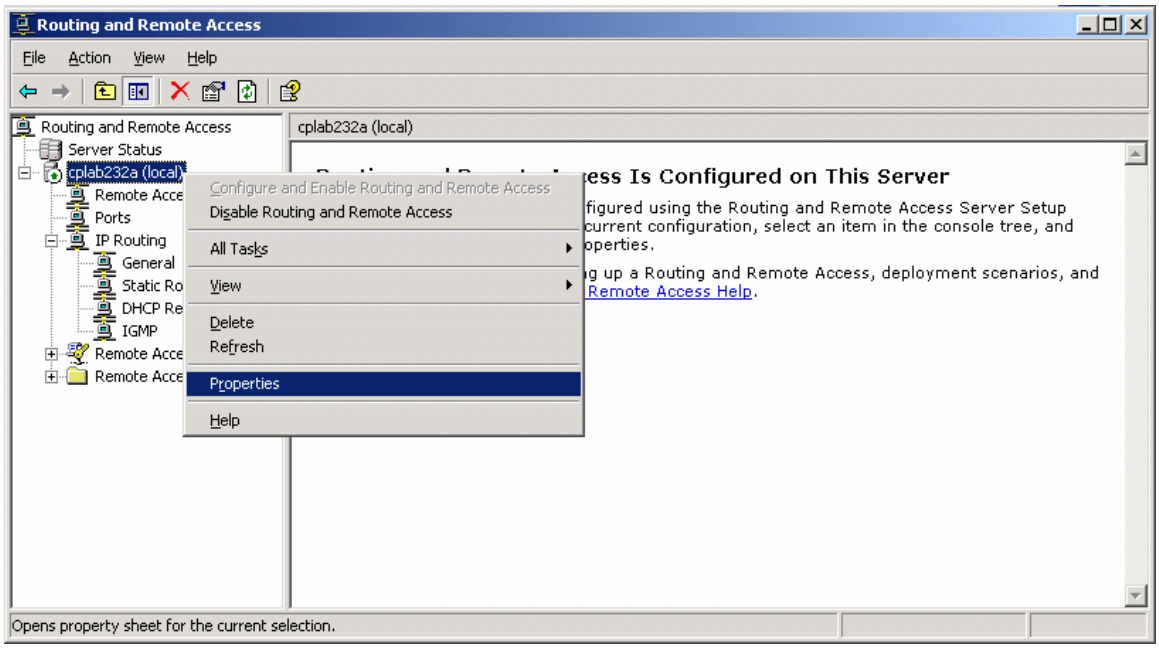


13. Once the configuration is complete the RRAS manager will be updated to reflect the changes that have been made.

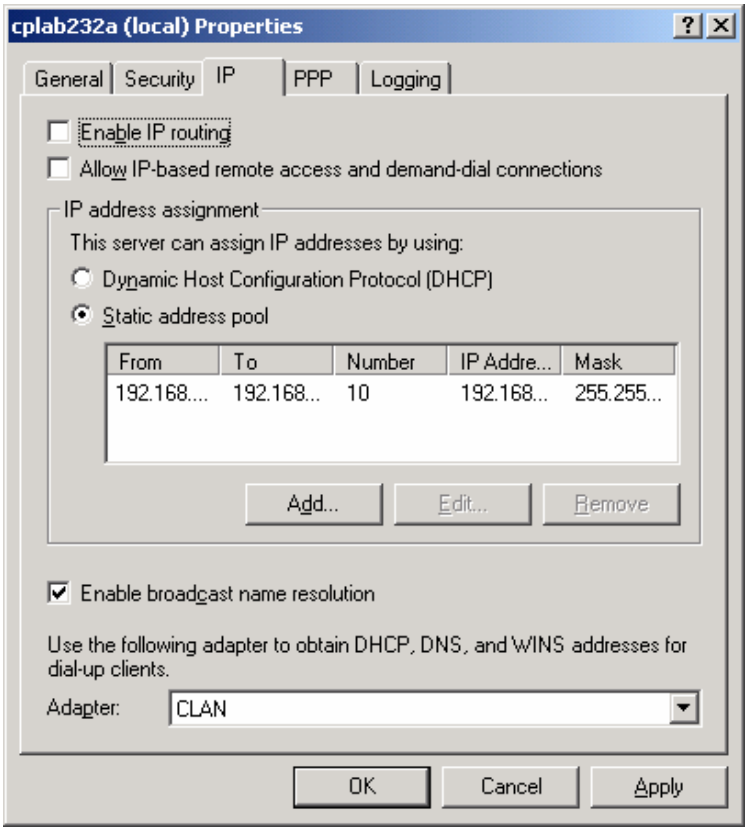


Update RRAS configuration:

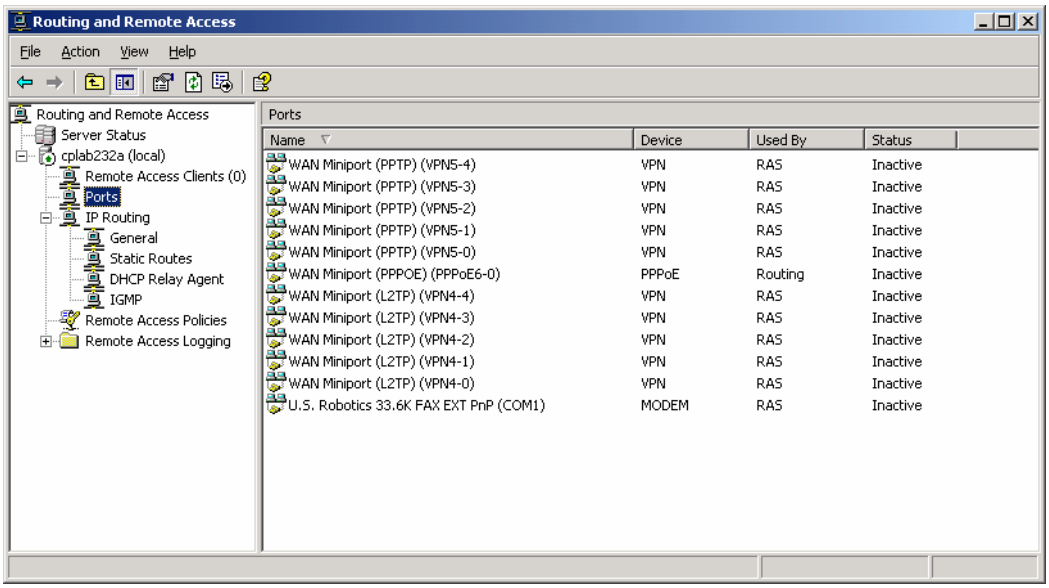
14. Select the server, right click and select properties.



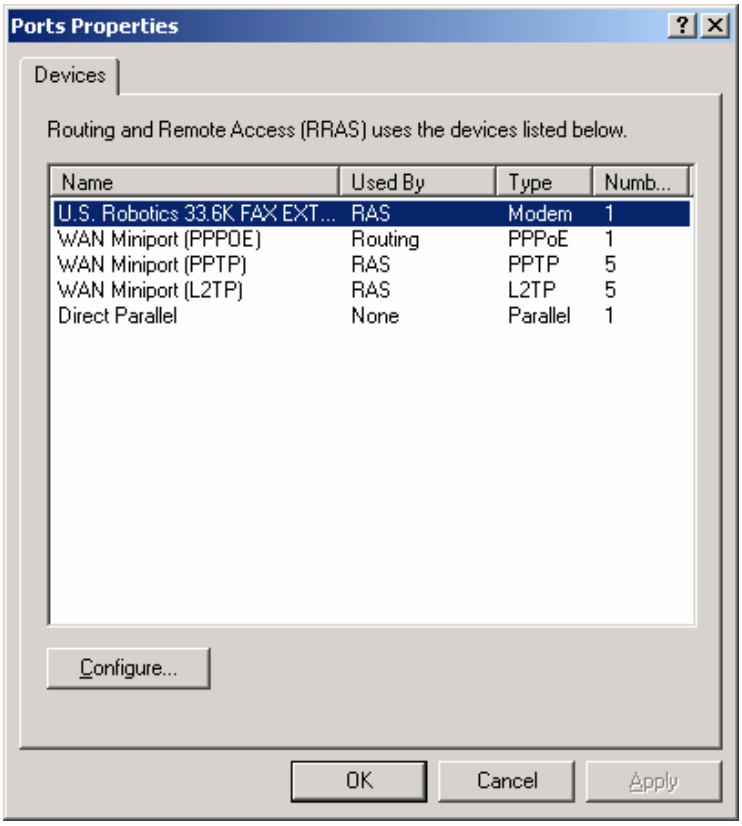
15. Change to the IP tab, de-select the "Enable IP routing" and "Allow IP-based remote access and demand-dial connections", and then click on **OK** to close the dialog.



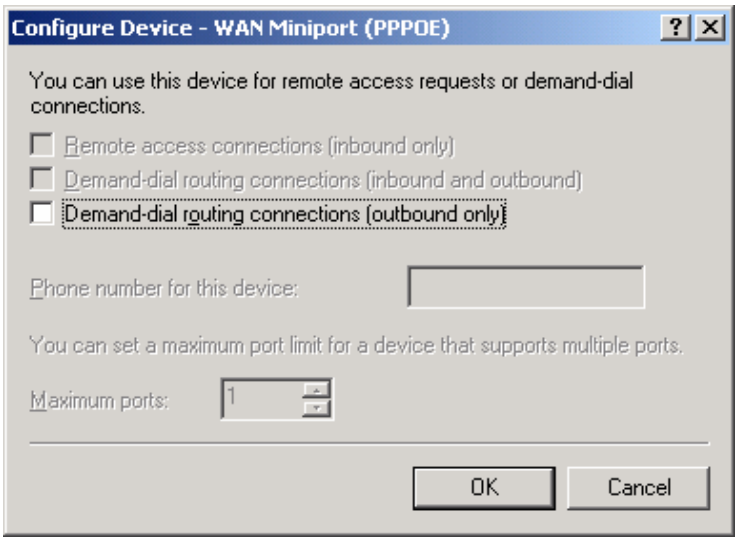
16. Select the Ports item, right click and select properties from the drop down menu.



17. By default there are more ports enable than are desired. Select the "WAN Miniport (PPPOE)" item and click Configure.

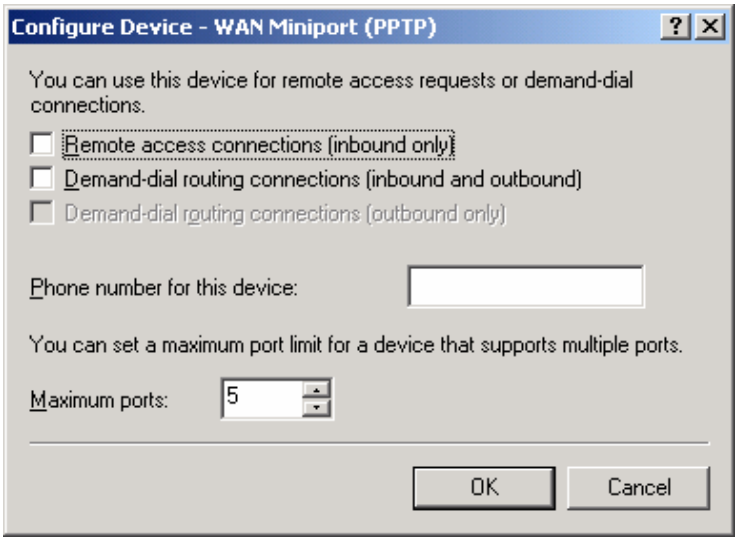


18. Deselect the demand-dial routing connections option is disabled and click **OK**.



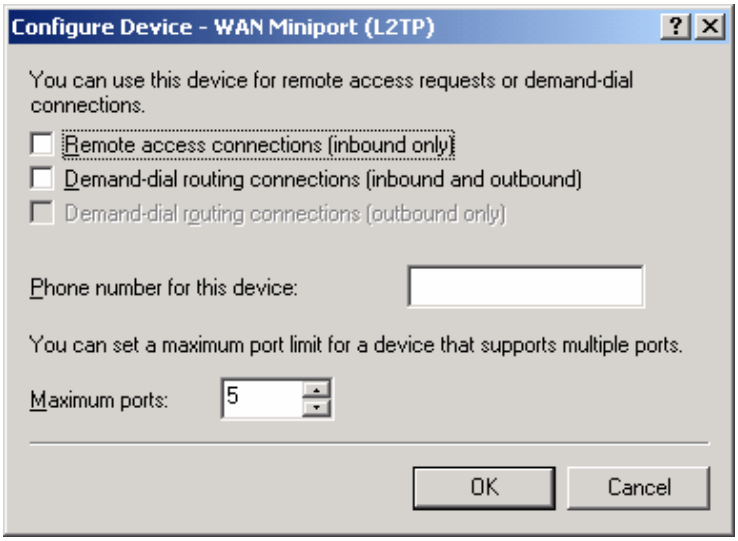
19. Select the WAN Miniport (PPTP) option and click configure.

20. Ensure that both the Remote access connections, and demand-dial routing connections options are de-selected and click **OK**.

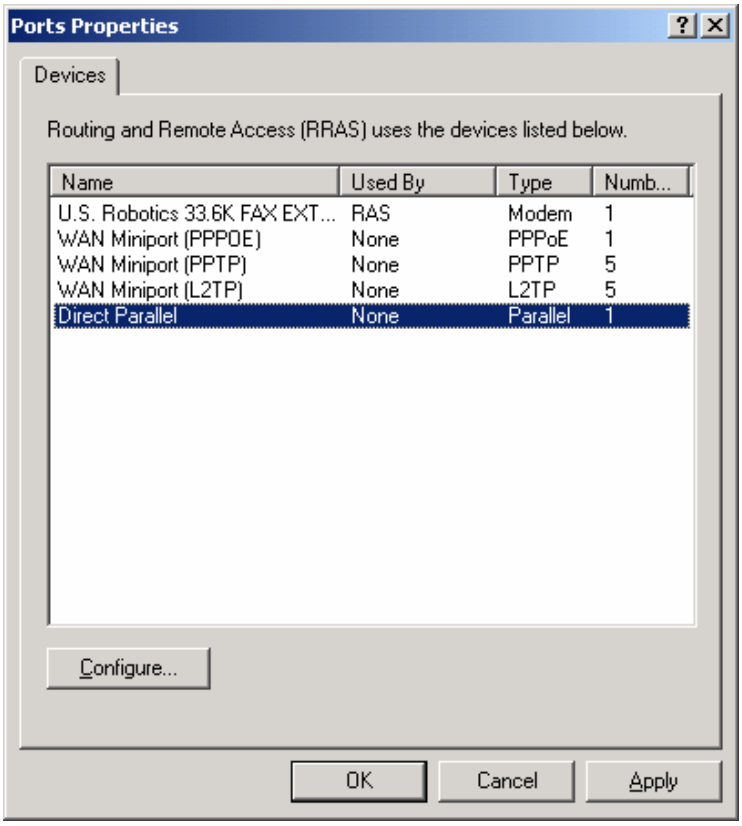


21. Select the WAN Miniport (L2TP) option and click **Configure**.

22. Ensure that both the Remote access connections, and demand-dial routing connections options are de-selected and click **OK**.



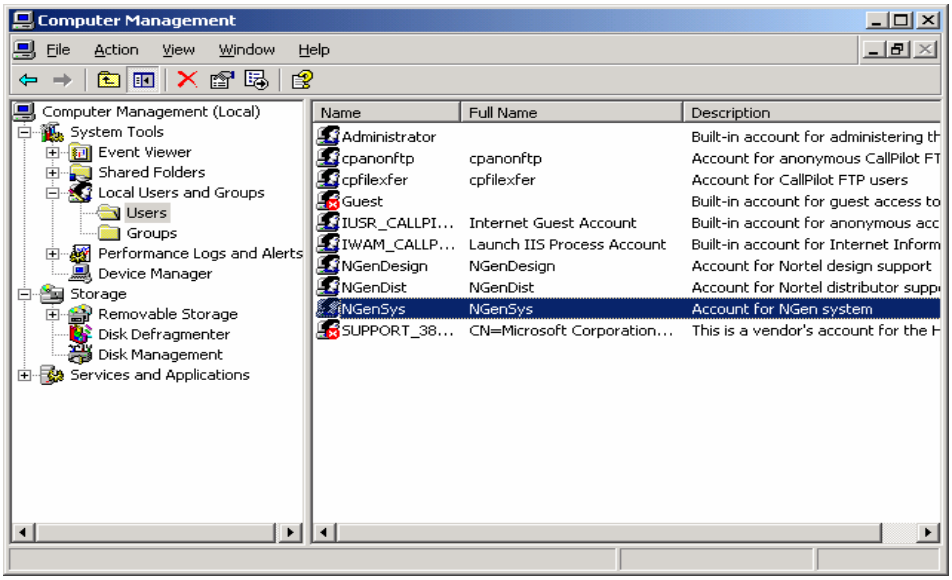
23. Once all of the changes are complete only the external modem should show that is in use. Click on **OK** to exit the ports properties page.



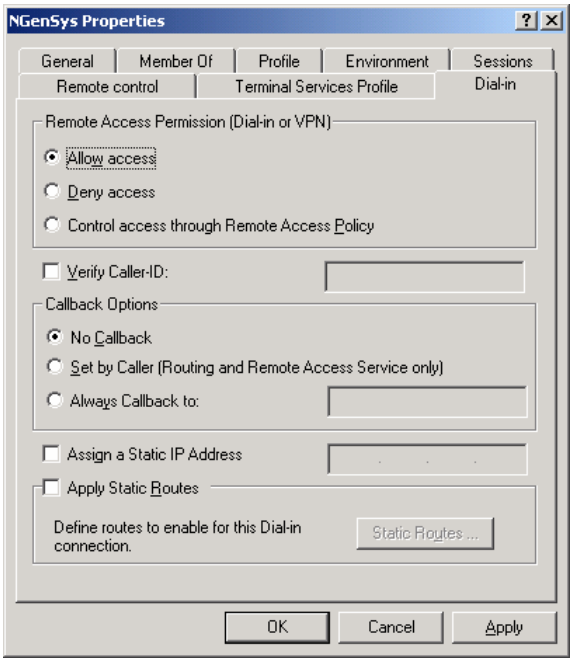
24. Exit the RRAS configuration manager.

Configure Users for RRAS:

25. Launch the computer management tool:
(Start -> Administrative Tools -> Computer Management), and select the local user's folder.



26. Double-click on the **NGenSys** user to display the user properties. Select the "Dial-in" tab, select the "Allow access" option and then click on **OK.**



27. Repeat step 18 for the NGenDesign and NGenDist users.

Appendix C : Updating the 201i BIOS

CallPilot 3.0 requires a new BIOS version (6.0.3) in order for Windows 2003 to run correctly on a 201i server. The BIOS should be upgraded before installing CallPilot 3.0 / Windows 2003 from a CallPilot Image CD.

Note: The semi-automatic update process includes steps that repartition and formatting your hard drive, please ensure you would like to do that.

Manual process to update the 201i BIOS:

1. Power on the server.
2. Insert the CallPilot 201i Image CD into the CD-ROM drive.
3. Enter the BIOS setup program by pressing <F2> at the "Press F2 to enter SETUP" prompt.
4. Use the left/right arrows to select "Advanced".
5. Use the up/down arrows to select "Installed O/S:".
6. Use the +/- keys to change the value to "Other".
7. Press <F10>.
8. Select "Yes" to confirm that the changes should be served.
9. After the server reboots, enter 'Y' when prompted "BOOT ROM DOS (Default to No in 5 seconds) (Y/N)" in order to launch ROM DOS.
10. When the ROM DOS Startup menu is displayed press <F8> to enable confirmation of the DOS configuration. You can verify that this is enabled by checking that the N changes to a Y at the bottom of the screen.
11. Select "1. SCSI CD-ROM" by entering 1 and pressing <Enter>.
12. You will now be prompted to confirm each line in the config.sys and autoexec.bat file. Press 'Y' to accept the 1st line "STACKS=9,256".
13. Press 'Y' to accept the 2nd line "NUMLOCK = ON".
14. Press 'N' to not accept the 3rd line "DEVICE=A:\DOS\HIMEM.SYS…". This is required since you can not flash the BIOS if himem is loaded.
15. For all of the remaining questions, press 'Y' to accept the line.
16. At the A:\ command prompt navigate to the CD ROM (Z:\biosutil\) and run phlash.exe to upgrade the BIOS.

Semi-automatic process to update the 201i BIOS:

1. Perform steps 1-9 as above.
2. Navigate to Z: and run Phase1.bat, system will reboot after.
3. After the server reboots, enter 'Y' when prompted "BOOT ROM DOS (Default to No in 5 seconds) (Y/N)" in order to launch ROM DOS.
4. Navigate to Z: and run Phase2.bat, system will reboot after.
5. After the server reboots, now by default, server will boot from C: drive
6. On prompt "1. Update BIOS", press <Enter>

NOTE: After updating the BIOS, if you boot from the hard drive again before you install CallPilot from image, you would receive a prompt like this:

1. Re-do BIOS update
2. Reboot

Appendix D : Updating the 1002rp BIOS

You can choose to update 1002rp BIOS by following the steps below:

1. Disconnect the CLAN network cable.
2. Insert the CallPilot 03.03.06.02 Image CD – Disk 1 that is appropriate for the platform type that is being recovered into the CD-ROM drive.
3. Power on the server.
4. Set the BIOS to boot from CD-ROM.
5. When the server boots from the CD-ROM, select option 2 "Utilities (BIOS, Firmware, etc...)" and press <Enter>.
6. Choose option 1 to "Update 1002rp BIOS to version NNCXUA07"
7. When prompted to same existing BIOS, choose "No" (N).
8. When prompted to program the boot Block, choose "Yes" (Y)
9. When prompted to enter the file name, type "NNCSAU07.ROM"
10. Press "Y" to continue
11. After upgrade is complete, the system will prompt for reboot.

During the boot process, check the version of the BIOS on the top of the screen in the first boot screen. If it is not NNCXUA07, check if jumpers J10 and J11 are both on the top positions. You will need to power off the system and remove the SBC for this operation. Ensure ESD rules are followed or damage to board may occur due to static electricity.

Appendix E : Updating the Mega-RAID Firmware

703t Tower and 1002rp Rackmount servers could have either the MegaRaid Elite 1600 or MegaRaid Elite 320-2 RAID card installed. The firmware update process is as follows:

1. Perform a RAID consistency check
2. Perform a full-system backup
3. Disconnect the CLAN network cable.
4. Insert the CallPilot Image CD – Disk 1 that is appropriate for the platform type that is being recovered into the CD-ROM drive.
5. Power on the server.
6. Set the BIOS to boot from CD-ROM.
7. When the server boots from the CD-ROM, select option 2 "Utilities (BIOS, Firmware, etc...)" and press enter.
8. Choose either option 2 to "Update firmware for MegaRaid Elite 1600" or option 3 to "Update firmware for MegaRaid Elite 320-2" depending on your RAID card type.
9. Allow the F/W to update. At the end of the procedure, the system will prompt to reboot.
10. Once the reboot is performed, the F/W upgrade is complete.
11. Split the RAID
12. Re-image the server
13. Restore from full-system backup
14. Re-sync the drives