



Distributor Technical Reference Bulletin

Bulletin Number: DTR-2005-0226-Global
Date: 12 July 2005

CallPilot Release 4.0

Introduction

This Distributor Technical Reference (DTR) bulletin provides information that supplements the formal documentation for the purpose of installing, upgrading, and supporting CallPilot Release 4.0 (04.04.04.00) 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 4.0.

For more details on feature installation and operation, refer to the CallPilot 4.0 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.

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Revision history

Issue Number / Date	Type of Review / Reason(s) for Issue	Author
Standard / Revision 1.0	Initial release of the 4.0 GA DTR. Based on 3.0 DTR, release 1.1 of the release notes and internal review feedback from PLM, MDS, and Technology.	David Saunders

Table of contents

CallPilot Release 4.0.....	1
1 The Distributor Technical Reference Bulletin	5
2 Product Requirements	8
3 Meridian 1 switch requirements.....	18
4 Communication Server 1000 switch requirements.....	24
5 CallPilot software.....	27
6 Feature Limitations	29
7 Procedures.....	35
8 Known Problems / Issues	40
9 PEP/Service Update application overview.....	52
10 Documentation References.....	54
Appendix A : CallPilot/SCCS Integration	55
CallPilot 4.0 / Symposium Call Center Server 4.2 Integration checklist.....	55

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 4.0 that is not covered by the NTP documentation supplied with the system. This DTR is intended for use in conjunction with the latest CallPilot 4.0 (04.04.04.00) software CDs. Refer to the complete listing in [CallPilot Software](#).

1.2 What's new in CallPilot 4.0

- **Simplified Upgrade:** new wizards “walk” the user through the upgrade procedure. The new Upgrade Wizard checks the system and identifies issues *before the system is even taken out of service*.
- **Directory Synchronization:** Provides the ability to synchronize users between a Active Directory and the CallPilot Server
- **Message Forwarding Rule:** allows users to have their messages automatically forwarded to an external email account or PDA.
- **Message Archive:** gives the administrator the option to save a copy of every message received on the CallPilot system.
- **Multiple MWI DNs:** each user can now be assigned up to 8 different MWI DNs.
- **Expanded Capacity:** the 1002rp's capacity is increased from 96 channels to 192 channels.
- **Support for both M1/Succession and T1 connections:** CallPilot 4.0 is the first release since 1.07 that supports connecting to both the M1/Succession switches and the DMS100/SL100 switches.
- **Various My CallPilot Enhancements** include:
 - Users can record and edit their mailbox greetings
 - External email address book support
 - Ability to call the sender of messages from both CallPilot or external email server
 - Support for Linux and Firefox browsers
 - Support for connection to multiple CallPilot servers
- **Various Desktop Messaging Enhancements** including:
 - Instant Messaging support
 - Ability to call the sender of a message from an external email server
 - Windows installer (MSI) support
 - Novell personal address book enhancements
- **Auto Delete:** an extension to the Auto Add feature that allows you to delete a group of mailboxes at once.

1.3 Supported Operations

1.3.1 Features on Controlled Release

The following is a list of 4.0 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 Integration supported

The following switch integrations are supported:

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

1.3.3 Switch Integrations deferred

The following switch integrations will be supported in CallPilot 4.0 SU1:

- Meridian SL-100
- DMS-100 Centrex (with CallPilot at customer site)

1.3.4 Server and Client Upgrades supported

Upgrades to CallPilot 4.0 are supported directly from CallPilot version 2.02, 2.5 and 3.0. Minimum SU levels required are; 2.02 SU3 and 2.5 SU2. Upgrading to CallPilot 4.0 from CallPilot version 1.07 requires an intermediate upgrade from 1.07 to 2.02 and then to 4.0.

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 4.0 Documentation on CD-ROM*” (NTRG19CA for English, NTRG19DA 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 [PEP/Service Update application overview](#) for additional information.

1.6 Localized Media

The table below summarizes the localized CallPilot 4.0 media available:

Language	Voice Prompts	Desktop Messaging	My CallPilot	Speech Activated Messaging	E-mail by Phone	End-User Docs
Arabic	✓					✓
Cantonese (Traditional Chinese)	✓					✓
Danish	✓					✓
Dutch	✓				✓	✓
English, American (US)	✓	✓	✓	✓	✓	✓
English, Australian	✓	✓	✓		✓	✓
English, Canadian	✓	✓	✓	✓	✓	✓
English, Irish	✓	✓	✓		✓	✓
English, UK (Female)	✓	✓	✓	✓	✓	✓
Finnish	✓					
French, Canadian	✓	✓	✓			
French, European	✓			✓	✓	✓
German	✓			✓	✓	
Hebrew	✓					
Italian	✓			✓	✓	
Japanese	✓					
Korean	✓					✓
Norwegian	✓					✓
Polish	✓					✓
Portuguese, Brazilian	✓					
PRC Mandarin (Simplified Chinese)	✓					✓
Russian	✓				✓	
Spanish, Castilian (European)	✓				✓	
Spanish, Catalan	✓					✓
Spanish, Latin American	✓				✓	✓
Swedish	✓					✓
Taiwanese Mandarin (Traditional Chinese)	✓					✓
Turkish	✓					✓

Notes:

1. Localized versions of Desktop Messaging and My CallPilot 4.0 will be available at a later date. A bulletin announcing availability will be distributed when available. Customers wishing to utilize localized versions of Desktop Messaging and My CallPilot can use the 2.5/3.0 versions of the applications; however, some new CallPilot 4.0 features may not be accessible as they require a CallPilot 4.0 server.
2. End-user documentation is not localized by country. For example, customers in France and Quebec, Canada would use the same end-user documents.
3. Localized end-user documentation is available from the Helmsman web site.

2 Product Requirements

2.1 CallPilot 4.0 Compatibility

The following tables define CallPilot 4.0 compatibility with other products and environments it is likely to encounter.

Product / Function	CallPilot 4.0 Compatibility
Meridian Mail	<ul style="list-style-type: none"> Co-existence with Meridian Mail on Meridian 1 or Communication Server 1000/1000M/1000E 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Co-existence with Symposium Call Center Server or Express on the same M1/CS 1000 and ELAN is supported. CallPilot 4.0 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 4.0 supports Symposium Express 4.2 integration for voice processing script commands "Give IVR" also requires PEP SU-08 or later.
Internet Telephony Gateway (ITG)	<ul style="list-style-type: none"> 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), 2003	<ul style="list-style-type: none"> CallPilot 2.5 and 4.0 Desktop Messaging clients are compatible CallPilot 4.0 Application Builder client is compatible

2.1.1 Migration from Meridian Mail

Migration from Meridian Mail systems to CallPilot 4.0 is supported using the Meridian Mail migration utility tape NTUB25AC (available within NTUB24BA 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 4.0. 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.

Note: Unlike Meridian Mail where calls were directly routed to the main ACD-DN (queue) feeding Meridian Mail ports, a CDN is used to route calls to CallPilot. It is imperative that all calls be routed through the CDN and not directly to the ACD-DN associated with CallPilot channels. See the Migration guide for details.

2.1.2 Application Builder client / Operating System (OS) compatibility

Operating Systems:	2.02/2.5	3.0	4.0
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 4.0 Application Builder clients are backward compatible for use with a CallPilot 2.02/SU02 and later servers.
 3. CallPilot 1.07 , 2.0 and 2.5 clients are not compatible with 4.0.

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	2.50.06.17 and later	04.04.04.01
Microsoft Outlook 98 (Corporate Mode)	✓	
Microsoft Outlook 2000	✓	✓
Microsoft Outlook 2002 (XP)	✓	✓
Microsoft Outlook 2003	✓	✓
Lotus Notes 5.0x	✓	
Lotus Notes 6.0	✓	✓
Lotus Notes 6.5	✓	✓
Lotus Notes 7.0		
Novell GroupWise 6.0x	✓	
Novell GroupWise 6.5	✓	✓
Internet Mail clients	2.50.06.17	04.04.04.01
Microsoft Outlook Express 5.x	✓	
Microsoft Outlook Express 6.x	✓	✓
Microsoft Outlook 98 (Internet Mail Mode)	✓	
Microsoft Outlook 2000 (XP) (Internet Mail Mode)	✓	✓
Microsoft Outlook 2002 (XP) (Internet Mail Mode)	✓	✓
Microsoft Outlook 2003 (Internet Mail Mode)	✓	✓
Netscape 6.2x	✓	✓
Netscape 7.0, 7.1, and 7.2	✓	✓
Qualcomm Eudora Pro 5.x	✓	
Qualcomm Eudora Pro 6.0	✓	✓
Qualcomm Eudora Pro 6.1	✓	✓
Thin clients	2.50.06.17	04.04.04.01
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	✓	✓
Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server (All Editions)		✓

Supplemental Version Notes:

Desktop Messaging client version 2.50.06.17 and later:

1. Is supported for use with CallPilot 4.0, 3.0, 2.02, and 2.5 servers.
2. Offers localization.

1.05/1/06/1.07 Desktop Messaging clients:

- Are not supported for use with a 4.0, 3.0, 2.5 or 2.03 servers

2.1.4 Desktop Messaging client / Operating System (OS) compatibility

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

Operating Systems	2.50.06.17 and later	04.04.04.01
Windows 98SE (Second Edition)	✓	
Windows NT 4.0 Workstation (Service Pack 6A)	✓	
Windows NT 4.0 Server		
Windows 2000 Professional	✓	✓
Windows 2000 Server, Advanced, or Data Center Server		
Windows XP Professional (Service Pack 2)	✓	✓
Windows 2003 Server		
Macintosh OS 9.0 or 9.1		
Macintosh OS X		
Linux		

2.1.5 My CallPilot / Browser compatibility

My CallPilot Web Messaging supports the following Internet browsers:

Internet Browsers		2.5 (2.50.06.23)	4.0 (04.04.04.01)
Netscape 6.2x for Windows or Mac		✓	✓
Netscape 7.0, 7.1, and 7.2 for Windows or Mac		✓	✓
Microsoft Internet Explorer 5.x for Windows		✓	
Microsoft Internet Explorer 6.0 for Windows		✓	✓
Microsoft Internet Explorer 5.x for Mac		✓	✓
Mozilla 1.7.x for Linux			✓
FireFox 1.0 for Linux			✓

2.1.6 My CallPilot client / Operating System compatibility

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

Operating System	2.5 (2.50.06.23)	4.0 (04.04.04.01)
Windows 98	✓	
Windows 98SE (Second Edition)	✓	
Windows NT 4.0 Workstations (Service Pack 6A)	✓	

Operating System	2.5 (2.50.06.23)	4.0 (04.04.04.01)
Windows NT 4.0 Server	✓	
Windows 2000 Professional	✓	✓
Windows 2000 Server SP1 and above (w/ IIS 5)	✓	✓
Windows XP Professional	✓	✓
Windows 2003 Server (w/ IIS 6)	✓	✓
Macintosh OS 9.0 or 9.1	✓	✓
Macintosh OS X	✓	✓
Linux		✓

Notes:

1. 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.
2. Partial support for Mac OS X is supported with My CallPilot version 2.50.06.11 and later. Partial support functionality is read-only, listen-only mode. 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.
3. 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 4.0 My CallPilot, CallPilot Manager, and Reporter support the following operating systems and browsers:

Product / Function	CallPilot 4.0 Compatibility
Server side details:	
Operating Systems	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Internet Information Server 5.0 (Service Pack 1 or later) • Internet Information Server 6.0
Client side details:	
Operating Systems	<ul style="list-style-type: none"> • Windows 98SE • Windows 2000 Professional • Windows XP Professional • MAC OS 9.0 and 9.1 (for My CallPilot only)

Product / Function	CallPilot 4.0 Compatibility
Browsers	<ul style="list-style-type: none"> • Netscape Communicator 6.2x (with proper Java J2SE extension. See note.) • Netscape Communicator 7.0, 7.1, and 7.2 • Internet Explorer 6.x (with proper Java J2SE extension. See note.) • Internet Explorer 5.x for Mac (for My CallPilot only) • Mozilla 1.7.x for Linux (for My CallPilot only) • FireFox 1.0 for Linux (for My CallPilot only)

Notes:

- If Desktop Messaging and Web Messaging are installed on the same client PC, My CallPilot 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 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.nortel.com>, <http://www.java.sun.com> or the CallPilot 4.0 Applications CD.
- Javascript and Cookies must be enabled in the web browser.
- Support for localized browsers is not supported at this time, but will be available in a future up-issue.

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	No
Windows 2000 server with SP1 or SP2 and Microsoft Internet Information Server (IIS) 5	Yes
Windows 2003 Standard Edition and Microsoft Internet Information Server (IIS) 6	Yes
Windows 2003 Web Edition and Microsoft Internet Information Server (IIS) 6	Yes
Windows 2003 Enterprise Edition and Microsoft Internet Information Server (IIS) 6	Yes
Windows 2003 Datacenter Edition and Microsoft Internet Information Server (IIS) 6	To be decided

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 4.0 NTP documentation.

Platform	Component	Version
201i	BIOS	6.0.3
703t (CP3.0 – CP4.0)	BIOS	16 Build 75
	Firmware	FRU SDR 5.5 BMC 1.18
703t (CP2.02 – CP2.5)	BIOS	7 Build 64
1002rp	BIOS ¹	NNCXUA07
MPB96	Release	6 (Minimum)
LSI MegaRaid 1600	Firmware	111U ¹
LSI MegaRaid 320-2	Firmware	1L37

Note 1: Please refer to the NTP Server Maintenance and Diagnostics guides for configuration details, 555-7101-206 1002rp Rackmount, 555-7101-227 703t Tower, and 555-7101-119 201i IPE.

2.1.10 Supported customer LANs

Product / Function	CallPilot 4.0 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 4.0.
- ELAN must be configured the same as the switch configuration.
- 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-2005-0056-Global – *CallPilot Server Security Update* or published Clarify Bulletin System - Product Security 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/1000E 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/1000E 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 (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 shutdown the CallPilot system either of the following 2 methods are supported.

To Use "Ctrl-Alt-Delete" or Start/Shutdown 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. Enter a reason for shutting down the Computer in the reason field.

2.2.5 201i IPE recommended handling procedures

To minimize data loss or damage to the drive media, when removing power from the 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 disk to spin down (i.e. stop rotating), allowing the heads to come safely to rest on the platter surface.
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.nortel.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.nortel.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 4.0

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 4.0

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
	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 terset 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
Yes, Note 2	MPLR17779	Q00386764 Q00595929	Merge PEPs MPLR16528 and MPLR17074
	MPLR18025	Q00573831	User Unknown in CallPilot if MCDN TRO activated
Notes 3 and 4	MPLR18136	Q00636076 Q00661044 Q00743832	Merge of MPLR17274 (part of DEPAK 16001a), MPLR17369, and MPLR18122.

Recommended	PEP #	CR #	Description
	MPLR18165	Q00615655	For sites integrated with SCCS: Merge MPLR17006 and MPLR17323. Give Controlled Broadcast fails if CallPilot IVR TN is within internal loop of Superloop
	MPLR18765	Q00660974 Q00893081	For sites integrated with SCCS: BERR705/INI and ELAN007/ELAN014 errors when SCCS or CallPilot is rebooted.
Note 5	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 4	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.

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 obsoletes MPLR18122. If MPLR18122 was previously applied, it should be removed prior to installing MPLR18136.
4. PEPs MPLR18136 and MPLR18842 only apply under certain call transfer scenarios.
 - a. **Important:** Application of switch PEPs MPLR18136/MPLR18842 limits the Original Called DN information CallPilot receives to 8-digits maximum. This will impact some call-handling scenarios if >8 digits are used.
5. PEP MPLR18804 obsoletes PEP MPLR15156.

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
	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.
	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

Recommended	PEP #	CR #	Description
	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
Notes 3, 4, 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. Give Controlled Broadcast fails if CallPilot IVR TN is within internal loop of Superloop.
	MPLR18765	Q00660974 Q00893081	For sites integrated with SCCS: BERR705/INI and ELAN007/ELAN014 errors when SCCS or CallPilot is rebooted.
Note 6	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 5	MPLR18842	Q00826558	External callers that go into CallPilot and then thudial out to DN that is hard-CFW'd back to CallPilot receive incorrect BUSY prompt from the hard-CFW'd set's Mailbox.

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. MPLR18136 obsoletes MPLR18122. If MPLR1822 was previously applied, it should be removed prior to installing MPLR18136.
4. 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.
5. PEPs MPLR18136 and MPLR18842 only apply under certain call-transfer scenarios.
 - a. **Important:** Application of switch PEPs MPLR18136/MPLR18842 limits the Original Called DN information CallPilot receives to 8-digits maximum. This will impact some call handling scenarios if >8 digits are used.
6. PEP MPLR18804 obsoletes PEP MPLR15156.

4 Communication Server 1000 switch requirements

Communication Server 1000/1000M/1000E (a.k.a. CS1000 or Succession 1000) is a communications system that provides a single solution for telephony and data capabilities. Communication Server 1000/1000M/1000E 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 1000/1000M/1000E 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 and 4.0
- CallPilot 4.0 with the CallPilot Integration/Connectivity Code: NTZE39JB

4.3 X21 Packages required for CallPilot 4.0

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 Release 3.0 PEPs to support CallPilot 4.0

These PEPs are for CallPilot support on all CS1000/1000M/1000E 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
Notes 1 and 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. ** Caution – may impact thru-dial operations; X11/X21 team investigating re-write

Notes:

1. PEP MPLR18136 obsoletes MPLR18122. If PEP MPLR18122 was previously applied, it should be removed prior to installing MPLR18136.
2. PEPs MPLR18136 and MPLR18842 only apply under certain call-transfer scenarios.
 - a. **Important:** Application of switch PEPs MPLR18136/MPLR18842 limits the Original Called DN information CallPilot receives to 8-digits maximum. This will impact some call handling scenarios if >8 digits are used.

4.5 X21 Release 4.0 PEPs to support CallPilot 4.0

These PEPs are for CallPilot support on all CS1000/1000M/1000E systems running X21 R04.00.

Recommended	PEP #	CR #	Description
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.
	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.

Notes:

1. PEP MPLR18122 only applies under certain call scenarios.
2. PEP MPLR18842 only applies under certain call-transfer scenarios.
 - a. **Important:** Application of switch PEP MPLR18842 limits the Original Called DN information CallPilot receives to 8-digits maximum. This will impact some call handling scenarios if >8 digits are used.

5 CallPilot software

5.1 CallPilot CD suite

The table below identifies the CDs contained in the CallPilot 4.0 Software packages. Ensure you have the full set of CDs prior to performing any maintenance activity.

PEC	CPC	Label	Version	Date	Notes
NTUB50GA	N0002819	201i Platform 4.0 Image (3 CD set)	04.04.04.00	15-Jun-05	1
NTUB50HA	N0002825	703t Platform 4.0 Image (3 CD set)	04.04.04.00	16-Jun-05	1
NTUB50JA	N0002826	1002rp Platform 4.0 Image (3 CD set)	04.04.04.00	16-Jun-05	1
NTUB40JA	A0550943	4.0 Applications CD	04.04.04.00	08-Jul-05	
NTUB50??	N0002818	4.0 Service Update / PEP CD			
NTUB41DA	N0025456	Desktop Messaging software CD	04.04.04.01	14-Jun-05	
NTUB48BA	A0518670	My CallPilot software/updates CD	04.04.04.01	15-Jun-05	
NTUB44DA	A0550937	4.x Language Prompts – Americas (1 of 3)	04.04.04.00	8-Jul-05	2
NTUB44EA	A0550938	4.x Language Prompts – EMEA (2 of 3)	04.04.04.00	8-Jul-05	2
NTUB44FA	A0550939	4.x Language Prompts – Asia/Pac (3 of 3)	04.04.04.00	8-Jul-05	2
NTRG19CA	A0537089	4.0 Documentation CD (English)		July 25/05	
NTRG19DA	A0537090	4.0 Documentation CD (non-English)		July 25/05	

Notes:

1. Which platform-image CDs are shipped, NTUB50GA, NTUB50HA, or NTUB50JA 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, 3.0 and 4.x servers.

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	Bvw250
CallPilot system	NgenSys	Bvw250
CallPilot Distributor	NgenDist	Bvw250
CallPilot Design	NgenDesign	Bvw250
CallPilot Manager	000000	124578
pcAnywhere	CallPilotDist	<configured by installer>

Notes:

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

- CallPilot has strong passwords configured to contain a minimum of 6 characters plus at least 3 of the following; uppercase, lowercase, symbols and numerals. For example *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
CP404S00G02S	CallPilot Server security was compromised through FTP Service

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. CallPilot 4.0 contains all applicable Windows security updates through MS05-xxx. For a list of those individual Microsoft Security Updates (hotfixes) that apply to CallPilot 4.0 servers running the Windows 2003 Operating System, refer to Product Bulletin P-2005-0056-Global “CallPilot Server Security Update” or the published Product Security Advisory Alerts.

To apply the Microsoft Security Updates, use Start > Windows Update.

6 Feature Limitations

6.1 Language Availability

At the time of this printing, CallPilot 4.0 provides support for the following languages:

CD version	Language filename	Language
Americas (04.04.04.00)	Lang1046	Brazilian Portuguese
	Lang1033	English (American)
	Lang4105	English (Canadian)
	Lang3084	French (Canadian)
	Lang3082	Latin American Spanish
EMEA (04.04.04.00)	Lang1025	Arabic
	Lang6	Danish
	Lang1043	Dutch (Standard)
	Lang2057	English (Female European)
	Lang6153	English (Irish)
	Lang11	Finnish
	Lang1036	French (Standard)
	Lang1031	German (Standard)
	Lang1040	Italian
	Lang1044	Norwegian
	Lang25	Russian
	Lang1034	Spanish (European)
	Lang29	Swedish
	Lang1027	Catalan
	Lang1037	Hebrew
	Lang1055	Turkish
	Lang1025	Arabic
	Lang1045	Polish
Asia/Pacific (04.04.04.00)	Lang3076	Chinese (Cantonese)
	Lang1042	Korean
	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 4.0 is supported using the Meridian Mail migration utility tape NTUB25AC (available within NTUB24BA 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 versions of the migration utility NTUB24AA or NTUB24AB cannot be used with CallPilot 4.0. The Migration guide should be consulted for limitations.
- It is highly recommended the latest Meridian Mail to CallPilot Migration Utility Guide, Release 4.0 documentation be referenced when performing a migration. Check the Helmsman site for the latest version of this document.
- 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 EC11 must use only the updated MGate cards are used.

6.4 Installation & Upgrades

- **Do not install PC Anywhere on the 201i server.** PCAnywhere is not supported on the 201i server, as it results in a conflict with the software on that server – resulting in occasional blue screens.
- **MyCallPilot 04.xx** cannot be loaded onto a standalone server running release 2.5 of CallPilot Manager.
- 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 will not work correctly. The Upgrade Wizard will check that you have the correct CDs.
- For the directory sync feature, CallPilot will add a directory sync admin mailbox. If your system has maxed out the number of users allowed by your keycode it will fail to add the dirsync admin

mailbox. Before upgrading your system, you should free up 1 mailbox or request a keycode with additional mailboxes.

6.5 Drivers/Firmware

- **WARNING:** Do not use the Windows Device Manager to update or uninstall the MPB16 or MPB96 drivers. The device manager will not configure the drivers correctly, resulting in a blue screen. The drivers come pre-installed on the CallPilot server and are re-installed when the CallPilot server software is re-installed either via re-imaging or the Applications CD.

6.6 Backup/Archive/Restore

- It is recommended that after the CallPilot system is brought in-service, a new user archive is done.
- Restored customized prompts from CP 2.02 or CP 2.5 to CallPilot 4.0 are only supported if the customized archive is performed with CallPilot 2.02 + SU3 or later or CallPilot 2.5 + SU1 or later.

6.7 CallPilot Manager/Config Wizard

- The CallPilot Manager software provided with CP 4.0 can be used to administer CallPilot servers running releases 2.0, 3.0 and 4.0. It cannot be used with CP 2.5. A PEP will be made available in the near future for CP 2.5 servers.
- CallPilot 4.0 uses the strong password option on Windows 2003 for the NGenSys, NGenDesign, NGenDist and administrator accounts. When you change the passwords using the Config Wizard you can no longer use simple passwords. For a strong password, you must have 3 out of the following rules
 - A lower case character
 - An upper case character
 - A number
 - A special character (punctuation)
- Do not set the Windows 2003 security policy "Minimum Password Age" to anything but a value of 0. This will force you to change your passwords everyday. Setting this value to one, could result in the config wizard failing when it attempts to update the password.
- If you have a Citrix client installed on your standalone web server, you must install MyCallPilot and Reporter using the Add/Remove option of Windows. This is a Citrix requirement.

6.8 My CallPilot & Desktop

- When trying to connect to a 201i from a desktop using MS Remote Desktop, an error may occur which may block connecting to the server. This is a Microsoft problem as outlined in "The RDP protocol component "DATA ENCRYPTION" detected an error in the protocol

stream and has disconnected the client "Microsoft Knowledge Base Article - 323497" You can read the solution here: <http://support.microsoft.com/?kbid=323497>.

- My CallPilot and Desktop use the first extension DN associated with a mailbox for the Call Sender feature. If this field is blank, then a blank DN will be presented to the user. The user can simply enter the extension DN to call the user. Note: this only needs to be done once. My CallPilot and Desktop will remember what is entered and use it in the future.

6.9 Remote Access

- When logged in through remote desktop you must be connected to the root console to use any CallPilot tools. This requires running the 'shadow 0' command when connecting when you connect using "Method-1/Private" or "Method-2/Shared". For more information see: Product Bulletin P-2005-0026-Global "CallPilot 3.0 and the 201i IPE Platform - Using Microsoft Remote Desktop Connection".

6.10 Reporter

- If you have a Citrix client installed on your standalone web server, you must install MyCallPilot and Reporter using the Add/Remove option of Windows. This is a Citrix requirement.

6.11 Message Forwarding Rules

6.11.1 Mark Original Message as Read when Opened by Recipient:

- The feature makes use of the Read Receipt capability of the e-mail server the message was forwarded to. With this option enabled, a Read Receipt will be requested to be returned to the CallPilot system when the forwarded message is Read. CallPilot will recognize the returned Read Receipt when either:

1. A MIME message with "Content-Type: multipart/report; report-type=disposition-notification" is received, AND, an "In-Reply-To:" or "References:" field is found containing the Message ID of the original message,

-or-

2. A MIME message with "Content-Type: text/plain" is received, AND, a subject field is found containing the string:

"[MsgId="the Message ID of the original message, and the string "]". For example:



If CallPilot is able to extract the Message ID from an incoming Read Receipt, CallPilot will mark the message with that Message ID as Read. If this was the only message in the user's mailbox that

was Unread, the MWI light on the user's phone will be turned off. If the message had already been marked Read then no action will be taken.

Not all e-mail servers support Read Receipts. For example, at the time the document was written, Yahoo Mail and other popular e-mail servers did not support Read Receipts. It is up to the user to determine if their e-mail system supports Read Receipts.

To determine if the user's e-mail server supports Read Receipts, follow these steps:

1. Configure a CallPilot mailbox to forward to an account on the desired email server.
2. Send a message to that mailbox. Verify that the MWI goes on at the corresponding phone (MWI DN).
3. Verify that the message is received at the email account. (If possible, verify that a Read Receipt is requested.)
4. Read the message. (If possible, verify that a Read Receipt is sent out.)
5. Verify that the MWI light goes out on the phone (may have to wait a minute or so).

If the MWI goes out, this email server currently supports Read Receipts.

Also, some systems give Read Receipts a lower priority than other messages, and Read Receipts may not be returned to the CallPilot system immediately.

This Read Receipt feature is not supported when forwarding messages to a CallPilot mailbox. The option is disabled if a CallPilot mailbox address is selected as the forwarding target.

6.12 Directory Synchronization

- Q01158061: Directory Synchronization. If you check the events via the *Event Browser*, generated after a synchronization task, it will indicate zero errors. This may be incorrect. To check the actual result of a synchronization task, access the log files from the *Directory Sync* page.
- Q01164105: Directory Synchronization does not support the synchronization of a single user in the Active Directory to multiple CallPilot systems. If you try to do this, the user will only be added or updated on one CallPilot system.

6.13 Troubleshooting

The administrator can troubleshoot this feature by asking the user to check her CallPilot mailbox for Read Receipts from the external e-mail server. If a Message ID is not found, the message is treated as a normal Read Receipt and deposited into the user's mailbox (without error). If the feature is working properly, there will be no Read Receipts deposited into the user's mailbox because Read Receipts are deleted when the associated message is marked as Read.

If the event **54865 parsing error** is present in the Event log, a valid Read Receipt was received but a corresponding CallPilot message was not found. This is because the message had already been deleted.

The Event Log can be accessed in 2 manners:

1. The Windows Start button → Programs → Administrative Tools → Event Viewer
2. CallPilot Manager: System tab → Event Browser

If Read Receipts are not reliably returned or do not contain the information required to match them with the originally forwarded message, then the Message Forwarding Rule should be configured to either Mark the message as being Read when the message is forwarded or uncheck the 'Mark original message as Read' checkbox.

- Q01157641: Using CPTrace. CPTrace can be used to troubleshoot a number of programs, including the Desktop Client, My CallPilot and Directory Sync. CPTrace is called My CallPilotTrace when installed with My CallPilot, however it is identical to CPTrace. When troubleshooting the desktop, you must run CPTrace on the client PC, not the CPTrace installed on the CallPilot Server.
- Q01155348: The *Mailbox Number* field under the *Broadcast Information* heading on the Messaging Management page cannot be left blank. It must contain a valid number that does not conflict with any existing mailboxes or dialing codes.

7 Procedures

This section describes any key steps or last minute changes to the upgrade procedure for CallPilot 4.0. To ensure a smooth upgrade to CallPilot, it is imperative that you review all of the information contained in this section.

7.1 Upgrade Guide

Before upgrading your system, make sure that you have the latest copy of the Upgrade Guide NTP, available for download from Helmsman at: <http://www.nortel.com/support>

7.2 Upgrade Wizard

When upgrading a system to 4.0, you must run the Upgrade Wizard on your current system to ensure that your current hardware and data is valid to upgrade to CallPilot 4.0. *Failure to run the upgrade wizard may result in a failure in the upgrade process or an unstable system.*

To upgrade to the CallPilot 4.0 Beta load, you must use the latest upgrade wizard. You can retrieve it from the Enterprise Solutions PEP Library (ESPL) at <http://www.nortel.com/espl>, using PEP ID "CP40_UpgradeWizard" or by searching using the following parameters

- Product = [CallPilot](#)
- Platform = [Server](#)
- Release = [4.04.04](#)
- Status = [Released](#)

If a previous version of the upgrade wizard has been installed, uninstall it first, then install the latest one.

7.3 RAID Updates & the Upgrade Wizard

On 1002rp and 703t systems running CallPilot Releases 2.02 (2.01.27) or 2.5, you must update your RAID firmware, driver and power console *prior* to splitting the RAID and creating your backup. This will ensure that you can safely boot from the 2.02/2.5 side of the RAID in the event that you must back out of the 2.02/2.5 → 4.0 upgrade. If you attempt to run the Upgrade Wizard prior to updating your RAID software, it will warn you but allow you to continue to check your system. However, the Upgrade Wizard will not allow you to proceed to the upgrade portion of the wizard (i.e. create your backup) until you have updated the RAID software. The RAID software is available Enterprise Solutions PEP Library (ESPL) at <http://www.nortel.com/espl> using PEP ID "CP40_RAIDUpgrade" or by searching using the following parameters:

- Product = [CallPilot](#)
- Platform = [Server](#)
- Release = [4.04.04](#)
- Status = [Released](#)

7.4 Setup Wizard & Config Wizard

The Setup Wizard is new for CallPilot 4.0. It will walk you through the setup of your system. It runs automatically when you reboot your system the first time (and until you have completed it). It will launch Config Wizard at the end. *Do not try to run Config Wizard until the Setup Wizard has been run.*

The first time that you run Internet Explorer (IE) to access CallPilot Manager and the Config Wizard, it will access the Windows Update page.

7.5 PEPs

Important: Ensure that you download any PEPs for CallPilot 4.0 release 4.04.04.00 and install them when prompted during the Setup Wizard. The PEPs can be retrieved from ESPL from <http://www.nortel.com/espl>, under:

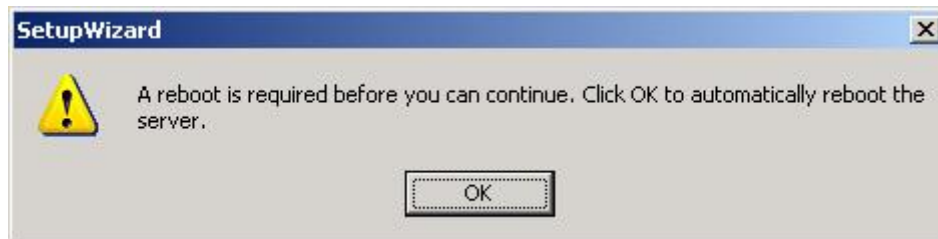
- Product = [CallPilot](#)
- Platform = [Server](#)
- Release = [4.04.04](#)
- Status = [Released](#)

Note: after installing 4.0 or booting up a new system for the first time, the Setup Wizard will walk you through setting up you CallPilot. It will prompt you when to install PEPs. *At this point, the Windows 2003 network configuration has not been defined.* If you plan on downloading PEPs from ESPL/MPL, you can either configure your network settings from the control panel –or– download the PEPs on another PC that has a network connection and burn them to a CD (recommended).

Important: DO NOT CHANGE THE COMPUTER NAME from Windows – it must be done via Config Wizard. If you change the computer name through windows before running the Setup Wizard, the wizard may run into problems starting services. If you encounter this issue, reboot the server and run setup wizard again.

7.6 Reboot After Setup Wizard

When you have completed the Setup Wizard the system will automatically reboot the server before running the Config Wizard. Prior to the reboot, the following popup will appear. Click OK to reboot the server.



Important: If the server does not start shutting down after a few seconds – a manual reboot may be required.

7.7 **IMPORTANT: Desktop Upgrades From CP4.0 Beta Release**

Important: When a user upgrades their desktop from any of the CallPilot 4.0 beta versions to the GA version 4.04.04.01, they will have to re-enter some of their data before using the desktop. This does *not* apply to users who upgrade from other releases of the desktop 2.xx or 2.5x. As a minimum, users will have to enter their mailbox and password info. They will also have to re-enter any custom information that they have entered including:

- Any configuration changes in the General, Mail, Address Book, and Audio Player tabs of CallPilot configuration.
- Changes to telephone / fax numbers.
- CallPilot Desktop Messaging will be removed from all email profiles (though the installer will re-add it to the default email profile).

It is recommended that a notice is sent to all users to write down this information before they upgrade their desktop. Then they can re-enter it after they have installed the 4.04.04.01 desktop.

7.8 **Other Information**

- The default password for the Administrator, NGenSys, NGenDist and NGenDesign accounts is “Bvw250”.
- You will require a new CallPilot 4.0 keycode to setup your system. Keycodes provided with CP2.0, 2.5 and 3.0 cannot be used with CP 4.0 system.
- If you encounter any other issues, check the Limitations section 6 and the Known Problems section 8.

7.9 **Requirements for CallPilot Manager Stand-alone Web Servers**

The requirements for the stand alone web server for installing CallPilot Manager (with or without 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 ¹
Windows 2003 Standard Edition	Yes
Windows 2003 Web Edition	Yes ²
Windows 2003 Enterprise Edition	Yes ²
Windows 2003 Datacenter Edition	To be decided

Notes:

¹ Windows 2000 Terminal server is not supported.

² These flavours of the Windows 2003 OS are untested as of the time of publication of this document.

Important: If you are running CallPilot Manager or Reporter on a Windows 2003 server with Service Pack 1 installed, check the Reporter NTP for key steps required to configure the server.

7.10 Re-Installation of Software

At times you may be required to remove and install or re-install various CallPilot related components. The following is a list of these components. Uninstalling and installing the CallPilot server software is no longer supported, only a system reimage. Reinstall of the CallPilot software is still supported.

7.10.1 AppBuilder Install

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

The Application Builder install / reinstall / upgrade executable (appbuilder.exe) can be found in the \CallPilotInstall folder on the root of the CallPilot Applications CD.

7.10.2 Directory Sync MMC Plugin

The Directory Sync MMC plug-in install executable (plug-in.exe) can be found in the \DirectorySync folder on the root of the CallPilot Applications CD.

7.10.3 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

7.10.4 CallPilot Server Reinstall

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

Note: While Reinstalling 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.

7.10.5 pcAnywhere uninstall

If pcAnywhere is uninstalled, it removes a DCOM registry value that is required for CallPilot Manager, My CallPilot, Application Builder, and Reporter to function correctly.

Workaround: Obtain the “EnableDCOM.reg” file from the ESPL PEP Library and apply to the CallPilot system. The affected applications will resume functioning normally.

7.10.6 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

7.10.7 LSI MegaRaid 1600/320-2 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

7.10.8 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

7.11 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 them 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
Q00959066		201i hard drive head crashing - needs spin down feature upon shelf removal
Q01131373		System didn't take access calls after disable and enable the access channel
Q00858851		CallPilot doesn't drop/release DSP if not recording any command during training

8.2 Server

8.2.1 Intermittently server will not come into service

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 2003 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 be blocked from logging into the Windows 2003 system if logged out. Options at that point are (1) activate your system using the COA via the internet or phone, or (2) re-image your system for another 30 day trial period. 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. Upgraded 703t Tower systems require product activation as part of the upgrade process.

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 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 a value greater than zero (0).

Workaround: Adjust the Windows 2003 security policy for Minimum Password Age to zero (0). This will alter the security policy for this server, so recommend coordinating with the system administrator first.

8.2.5 “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.

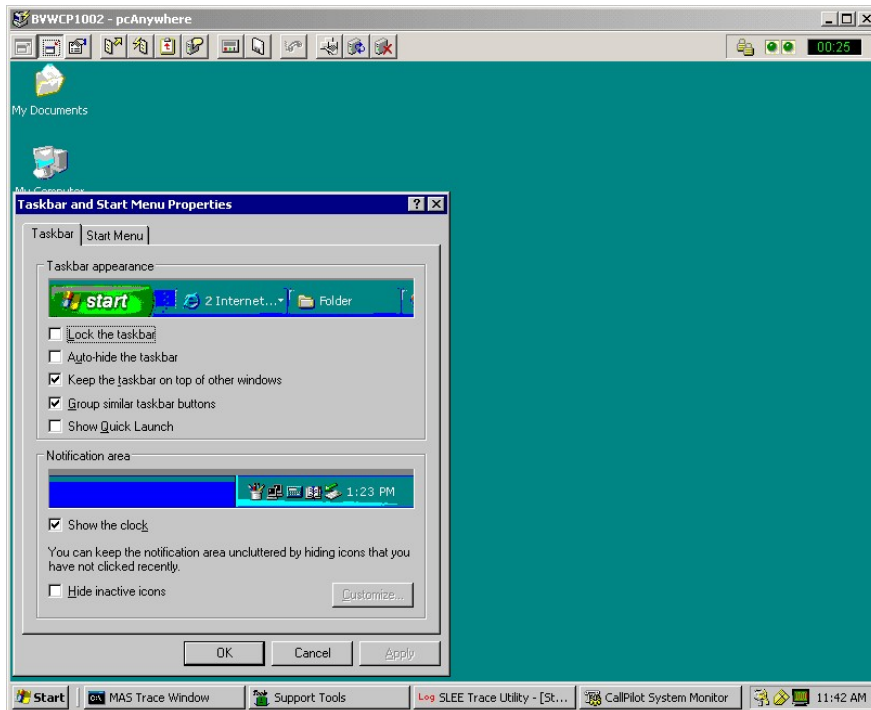
8.2.6 “RDP Protocol Component – Data Encryption” error

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>

8.2.7 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.



8.2.8 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.

8.2.9 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.

8.2.10 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.

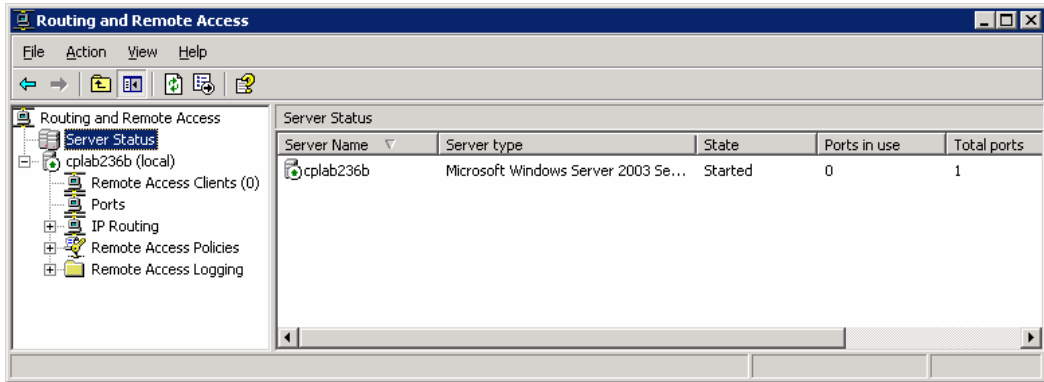
8.2.11 RAS connection to server unstable and drops

When the client makes a connection to a CallPilot server through a modem and RRAS, the connection appears unstable and finally drops. The connection is negotiated, modem to modem, then RRAS on the server side assigns temporary IP addresses to both the client and the server. From the client, when the server is ping'd using the assigned IP address (typically 192.168.0.1), mostly timeouts occur but some packets are successful. After a short period of time, the connection may drop. Impacted are any remote applications including Microsoft RDC, pcAnywhere, CallPilot Manager, Application Builder, etc. Refer to CR # Q01070343.

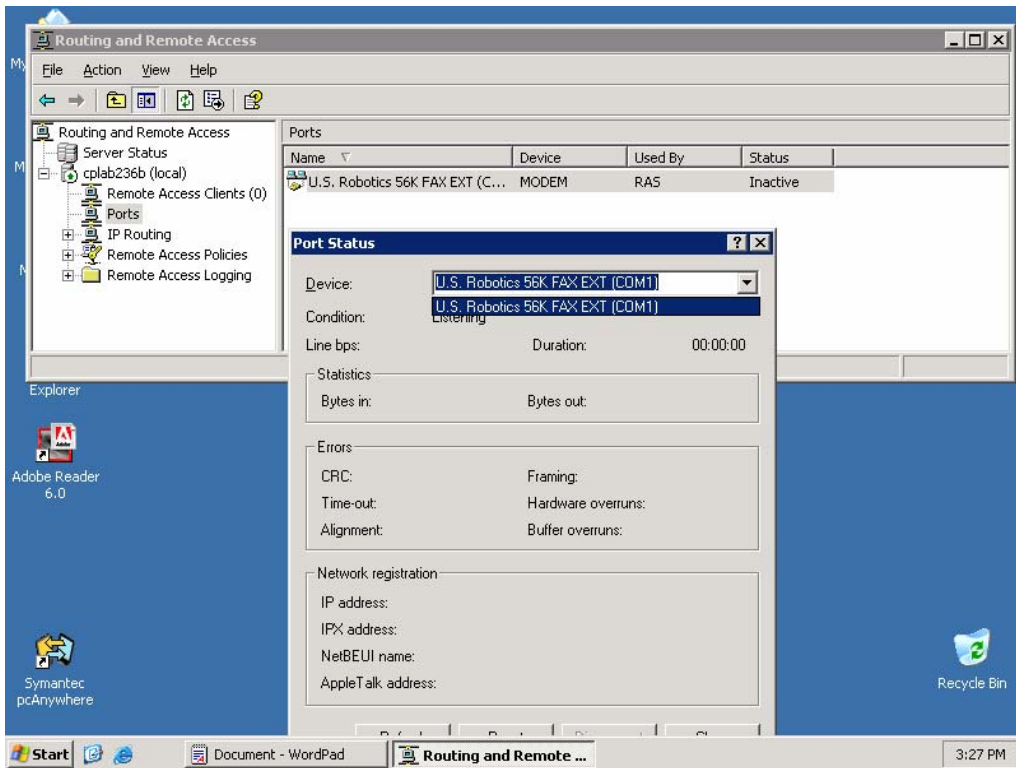
Workaround: The problem described above may occur if two (2) modem devices are configured for COM1, the one that was actually connected (US Robotics 33.6 FAX Ext. PnP)

and one not connected to the system, in CallPilot's case the Standard 33600 Modem. Because of this, instability is caused by the incorrect driver being used for the US Robotics modem.

To verify if two devices are connected to COM1, look into the Routing and Remote Access application (Start > Programs > Administrative Tools > Routing and Remote Access). Under Server Status there should only be one (1) total port. In the case of this failure, there may be two (2) or more.



Under Ports, select the modem and then Status. There should be only one device listed in the drop down list box (U.S. Robotics 56K FAX EXT (COM1)), but in this case there was also the Standard 33600 modem.



The only method of removing the incorrect modem (e.g. Standard 33600 modem) from RRAS is to remove it from the system.

The method used is to remove all modems from the system under Windows Device Manager, and then scan for new devices with only the correct modem connected to COM1. The Standard 33600 modem was now removed from the system, RRAS only contained the U.S. Robotics 56K FAX modem and automatically finds the correct driver.

8.2.12 List Tape Procedure with SLR32 and SLR50 Tape Drives

When performing a backup and restore in the same session (i.e. a system upgrade) on either an SLR32 or SLR50, a list tape performed before the restore will take an additional hour if the following two steps are not executed. This problem is due to an incompatibility with the Windows 2003 operating system and the use of aging tape drivers.

Workaround: Once the backup has been complete remove the tape cartridge. Do not reinsert the tape cartridge until the CallPilot server has been rebooted. If the tape is inserted before the reboot takes place, the problem will still occur.

8.2.13 CallPilot Modem Behavior on Windows 2003

In the field there have been issues with CallPilot 3.0 and the behavior of the shipped modem (Q01110486 "Unable to establish a dial in connection to the server"). The expectation is that the modem should operate in the same manor as it does on Windows NT, which is not the case. The issue appears to be the behavior of serial external modems on plug-and-play operating systems, in this case Windows 2003. The functionality of plug-and-play over a serial COM port is limited in comparison to the functionality of other I/O devices like USB.

In the case of the USB 56K external modem being shipped with CallPilot systems, and the existing 33.6K and 56K modems in the field. There are 2 distinct issues being experienced in the field; the first being if the CallPilot system is powered on but the modem is not connected and powered on. The second case being, if the modem has been functioning correctly and then turned off or disconnected from the COM port. When the modem is turned back on or reconnected, it will not answer calls.

The key to recognizing whether the modem is functioning and ready to accept calls is the 2 lamps CS (carrier sense) and TR (terminal ready) being lit. Typically the CS lamp is lit once the modem is turned on, but the TR lamp is the one that provides the challenge.

Workaround: Make sure that the modem is turned on, connected to the CallPilot system with the appropriate serial cable, and the DIP switch setting on the back of the modem is 3, 5, 8 down and the rest up.

Issue #1 – The modem is disconnected or turned off when CallPilot is rebooted.

If when the modem is turned on the TR lamp is not lit, perform the following steps to bring the modem into service.

1. **Run the Windows Device Manager** (right click on My Computer desktop icon/Manage/Device Manager)
2. **Look for Modems** in the list of devices
3. If Modems are not listed, right click on the top device (the computer name) and select **'Scan for hardware changes'**

4. Wait for the screen to flash a couple of times and Modems to appear.
5. The TR lamp should now be lit on the modem and ready to accept calls.

Issue #2 – The modem is turned off and on or disconnected and reconnected after having been functioning.

If when the modem is turned off or reconnected to the system and the TR lamp does not light, perform the following steps to bring the modem into service.

1. **Run the Windows Device Manager** (right click on My Computer desktop icon/Manage/Device Manager)
2. **Look for Modems** in the list of devices
3. If Modems are not listed, follow the procedure listed above with issue #1.
4. If Modems are listed, **click the +** to expand the list to make the connected modem visible.
5. Right click on the active modem and select **disable driver**.
6. You will be prompted with by the message 'Disabling this device will cause it to stop functioning...'
7. **Click the Yes button**
8. Again right click on the active modem and **select enable**.
9. The TR lamp should now be lit on the modem and ready to accept calls.

8.2.14 Power Console 5.0 shows up only when logged in with installed username

When upgrading the RAID subsystem on a 2.02 system, upgrading of the Power Console from version 4 to version 5 is required. Once upgraded, Power Console is only accessible using the same account that the software was installed (i.e. Administrator). When the system is logged into using one of the other accounts (i.e. NGenSys), the Power Console software is not visible under Start/Programs. Refer to CR# Q01167671.

Workaround: The only workaround to date is to log into the system using the account that the Power Console software was installed under.

8.2.15 Program is not responding

Q01150368: While the Upgrade Wizard is performing the data validation, if you move the window by dragging with the mouse, a "program is not responding" message may appear in the title bar.

Workaround: Ignore this message. Once the data validation is complete, the message will go away.

8.2.16 Error 35807 Event Popup Message after Config Wizard

Q01135737: After running the Config Wizard at the end of an upgrade, you may encounter a 35807 event popup generated after the page that informs you that your system has been configured successfully. This event is generated erroneously and has no impact on the system.

Workaround: Simply click ok to continue.

8.2.17 T1 Beta Only - Wait 3-4 minutes before running the Setup Wizard

Q01163001: *T1 Beta Only* After running the mini-Setup on a freshly installed T1 system, wait 3-4 minutes before running the Setup Wizard. Failing to do so may result in the Setup Wizard being unable to display the telephony and dialogic board information. If this is the case, quit the Setup Wizard, wait a few minutes and then run it again.

8.2.18 Not able to play existing messages after upgrade

Q01155348: In rare cases, after upgrading to the 4.04.04.01 desktop, a user may not be able to play existing messages (messages that were in their mailbox prior to upgrading the desktop).

Workaround: To open these messages, use CTRL + SHIFT + SEND RECEIVE.

8.2.19 Running Config Wizard, cannot leave Area Code field blank

Q01157224: When running Config Wizard, the *Area Code* field on the *Server Information* page cannot be left blank, even though some countries do not have area codes.

Workaround: Enter some “dummy” value in this field when running Config Wizard to allow configuration of the system. Once the system is configured, log into CallPilot Manager, access the *Dialling Information* page and delete the value for *Area Code* (the *Dialling Information* page allows the *Area Code* field to be blank).

8.2.20 MFR messages containing the file named *.dat

Q01163488: When using the Message Forwarding Rule feature, messages forwarded to an email account may contain a file named *.dat. However, you cannot open this file. This occurs when the original message delivered to the CallPilot mailbox includes a personal verification of the sender. This file has no impact on the message.

Workaround: Simply ignore the *.dat file.

8.2.21 Auto Delete feature only requires the Mailbox Number field in the input file

Q01163935: The Auto Delete feature only requires the Mailbox Number field in the input file. If you also use the MWI DN field, the Auto Delete feature will fail to delete any users.

Workaround: If your input file contains the MWI DN field, do not map this field. Best practice is to only map the Mailbox Number field.

8.2.22 A *.dat file is attached to a Message Forwarding Rule forwarded voice message

Q01163488: Occasionally a *.dat file is attached to a voice message forwarded via a message forwarding rule, to the email address of a user when the sending mailbox has a spoken name recorded.

Workaround: The *.dat file can be ignored and deleted.

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 Groups**, 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 4.0 “Support Tools” for resetting it to the default.

Note: This utility requires access to CallPilot “Support Tools”. If you do not have the password, you’ll need to engage your next level of support to obtain it or for them to assist with the reset procedure outlined below.

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 04.04.04.00 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\](#)

8.3.5 Reporter may no longer collect Information

Q01165638: After upgrading the CallPilot Server to 4.04.04.00, Reporter may no longer collect information. If the connection does not start, you may have to use the *Logout and Erase* option on Reporter. Note: this will erase all of the existing reporter information, so make sure that you generate any reports you require before using the *Logout and Erase* option.

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 configured 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

8.6 Application Builder

At the time of this printing, there are no known problems/workarounds.

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

8.8 Alternate User Interface

8.8.1 Menu User interface users unable to log in

Menu User Interface requires the mailbox length match that as configured in Messaging Management. If the mailbox length doesn't match what is configured, the user will be unable to log in from their telset. Refer to CR # Q01041115.

Workaround: Ensure all mailboxes that will utilize AUI services are configured with a mailbox DN length that corresponds the length as configured in Messaging Management / General "Length of mailbox number".

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 4.0 can be found on the Nortel Networks Enterprise Solutions PEP Library (ESPL) website at: <http://www.nortel.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.nortel.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. 4.00, 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 “Limited Distribution/Restricted” PEPs

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

9.3 Available CallPilot “Security Update” PEPs

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

For details on approved Microsoft security updates, refer to Product Bulletin P-2005-0056-Global “CallPilot Server Security Update” for details.

10 Documentation References

The following table provides a list of supplemental documentation, available at the time of this printing, which may be useful in support of CallPilot 4.0 servers.

These documents are available on the following web sites:

Nortel support: <http://www.nortel.com/support>
Partner Information Center (PIC): <http://my.nortel.com>

Document Type	Document Number	Description
Product Bulletin	99067	CallPilot Unauthorized Hardware and Software
Product Bulletin	P-2003-0151-Global	CallPilot Support for Anti-Virus Applications for details
Product Bulletin	P-2005-0026-Global	CallPilot 3.0 and 201i IPE Platform – Using Microsoft Remote Desktop Connection
Product Bulletin	P-2005-0056-Global	CallPilot Server Security Update

Appendix A : CallPilot/SCCS Integration

CallPilot 4.0 / 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 4.0 (04.04.04.00)
3. Minimum Meridian 1 X11 (25.40) or Communication Server 1000 (release 3.0) or later with the following software packages:

Pkg	Description	CallPilot		SCCS	
		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/1000E PEPs specific for CallPilot/SCCS Integration:

Product	Software Version/Release	PEP Number	
SCCS	04.02.06	NS040206CPSU07S or later	
CallPilot	04.04.04.00		
Meridian 1 (X11 software)	25.40	MPLR16351	
		MPLR16660	
		MPLR17700	
		MPLR18165	
		MPLR18765	
	25.40B	MPLR16351	
		MPLR16660	
		MPLR16968 (note)	
		MPLR17700	
		MPLR18165	
Communication Server 1000 (X21 software)	3.0	MPLR18765	
		MPLR19463	
	4.0	At this time, no additional PEPs are required for CallPilot and SCCS integration	

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.nortel.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 4.0 Installation and Configuration Guide, Part-3 Meridian 1 and CallPilot Server Configuration Guide
2. NTP 555-7101-510: CallPilot 4.0 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 4.0 (CallPilot_40).”
- 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.