



# What's New With CallPilot Release 5.0 – Installation and Configuration

> COURSE 6407F



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#### **Course Objective**



> After completing the course, the student will be able to:

- Identify CallPilot hardware platforms supported with Release 5.0.
- List new installation features introduced with CallPilot Release 5.0.
- List supported upgrade paths for CallPilot Release 5.0.
- Describe upgrade procedures required to upgrade legacy CallPilot servers to Release 5.0.
- Describe procedure used to implement the new High Availability feature introduced with CallPilot Release 5.0.
- Describe the security enhancements introduced with CallPilot Release 5.0.

#### **Course Lessons**



- Lesson 1 CallPilot Release 5.0 Supported Hardware Platforms
- Lesson 2 CallPilot Release 5.0 Installation and Upgrade Enhancements
- Lesson 3 CallPilot Release 5.0 High Availability
- Lesson 4 CallPilot Release 5.0 Security Enhancements



>Lesson 1



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#### **Lesson Objectives**



> After this lesson, you will be able to:

- List CallPilot Servers supported at Release 5.0.
- Identify features and capacities on new hardware platforms introduced with CallPilot Release 5.0.



## **Supported Hardware Platforms**

**CallPilot Servers** 

- > Legacy Hardware Platforms:
  - 201i
  - 703t
  - 1002rp
- > New Hardware Platforms:
  - 600r
  - 1005r





**RoHS Compliancy** 

- > European Union RoHS Directive:
  - Bans placing new electrical and electronic equipment containing more than agreed levels of certain hazardous materials on the European Union market including:
    - Lead
    - Cadmium
    - Mercury
    - Hexavalent chromium
    - Polybrominated biphenyl (PBB)
    - Polybrominated diphenyl ether (PBDE) flame retardants

> Both the 600r and the 1005r hardware platforms are RoHS compliant.



## The CallPilot 600r Server

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#### CallPilot Release 5.0 Supported Hardware Platforms

- > Platform Description:
  - A hardened long life Carrier Grade NEBS server
  - Industry standard 1U rack mount
  - Cost effective alternative to the aging 201i
  - Simplified installation and serviceability
  - Supported on CS 1000 / M1 PBX only
  - Clearance and weight:
    - Front: 2 in
    - Rear: 3.6 in
    - Sides: 1 in
    - Dimensions (DxWxH): 20x17x1.75 inches
    - Weight 23 pounds or 10.43 KG







600r: Simple and Compact Low End Server

#### > Platform Components:

- Based on Intel's "Chesnee" carrier grade NEBS compliant server
- 1U Rack Mounted Chassis
- Single P4 3.0 GHz/800MHz FSB w/ HT
- 512MB DDR 400MHz RAM
- Single 3.5" Ultra 320 10K 73GB SCSI HD
- One U320 embedded with external VHDCI Wide SCSI for optional external Tandberg SLR 75 tape drive
- Built in DVD-ROM/CDRW drive
- Embedded Dual 10/100/1000Mbps
- Single Full Length Full Height PCI-X 3.3V or 5V card slot
- Single 250W auto sensing 110/220V AC power supply
- Six variable speed fans directly dependent on server load
  - Dual redundant processor fans
  - DIMM fan
  - PCI-X card fan



600r: Simple and Compact Low End Server

## >Keycode Capacities:

- 1200 Storage hours
- 96 Channels
- 96 MPUs
- 50,000 Mailboxes
- 5000 Remote user/directory entry references
- 15,500 voice mail users
- 20,000 voice mail & desktop users
- Six Voice prompt languages
- Three Speech Rec. Languages







600r / 201i Hardware Comparison			
Platform Features	600r (Intel)	201i	
Form Factor	Rack 1U	M1 "inskins" Proprietary	
Memory	512MB DDR 400MHz	256MB PC66 (66MHz)	
Processor	P4 3.0GHz/800MHz FSB w/ HT	Celeron 300A/66MHz FSB	
Storage Protocol	One U320 embedded with external VHDCI Wide SCSI	Parallel ATA66	
Media	DVD-ROM/CDRW Built-in	External DVD-ROM	
Tape Drive	Optional External Tandberg SLR75 (read compatible down to SLR4)	Optional External SLR5	
Floppy Drive	N/A	N/A	



600r / 201i Hardware Comparison			
Platform Features	600r (Intel)	201i	
Hard Drive	Single 3.5" Ultra 320 10K 73GB SCSI HD	Ultra ATA 2.5" 7200 60GB Laptop Drive	
Ethernet	Embedded Dual 10/100/1000Mbps	Embedded Dual 10/100Mbps	
Slots	Single Full Length Full Height PCI-X 3.3V or 5V Slot	N/A	
Power supply	Single 250W auto sensing 110/220V AC	40 Watts Total – 8 Embedded	
System fans	6 fans (dual redundant (4) for processor, DIMM fan and PCI-X Card Fan)	None	



600r / 201i Hardware Comparison			
Platform Features	600r (Intel)	201i	
Embedded CP DSP Channels	N/A	1 (8 channels)	
Maximum CP DSP Channels	96	40	
I/O	Video, Mouse, Keyboard, VHDCI SCSI, USB, NIC, COM,	Video, Mouse, Keyboard, Narrow SCSI, Dual NIC,COM	



## The CallPilot 1005r Server

#### 1005r Rack-mount Server

#### > Platform Description:

- A hardened long life Carrier Grade NEBS server
- Industry standard 2U rack mount
- RoHS compliant but also addresses the North American CS 1000 / Meridian 1 1002rp market
- Also addresses the existing 703t Market due to its low cost and high demand for rack mount servers
- Supported on CS 1000 / M1 PBX only
- Clearance and weight:
  - Front: 2 in
  - Rear: 3.5 in
  - Sides: 1 in
  - Dimensions (DxWxH): 20x17x3.45 inches
  - Weight: 37.5 lbs or 17 KG (min config) 48.5 lbs or 22 KG (maximum config)

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#### 1005r Rack-mount Server

- > Platform Components:
  - Based on Intel's Langley/Irwindale carrier grade NEBS compliant server
  - 2U Rack Mounted Chassis
  - Dual Xeon Processor 3.2Ghz @800MHz FSB
  - Chipset E7520 with 800MHz FSB
  - Six DIMM slots DDR2-400 SDRAM memory - four modules populated for a distribution total of 2GB organized as 1GB redundant
  - Integrated dual channel U320 SCSI with external bus connection for SLR75 tape drive
  - 2x 10/100/1000 embedded NICs on system board







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#### 1005r Rack-mount Server

- > Platform Components (Continued):
  - Six PCI slots (3xFullSize 3xLowProfile):
    - 3 x Low Profile accommodating 1 RAID card and two double NIC cards
    - 3 x Full Size accommodating up to 3 MPB96 cards
  - PCI RAID card LSI320-1 as standard
  - Dual 147GB U320 SCSI 15k rpm hot swap hard drives
  - "No Tool Removable" Slim DVD/CDRW combo bay
  - Dual redundant hot swappable 500W power supplies
  - Serviceable system and processor fans
  - Remote H/W monitoring option / Local hardware monitoring standard via embedded Intel ISM









1005r Rack-mount Server

#### > Keycode Capacities:

- 2400 Storage hours
- 96 or 192 Channels\*
- 96 or 288 MPUs\*
- 50,000 Mailboxes
- 5000 Remote user/directory entry references
- 15,500 voice mail users\*
- 20,000 voice mail & desktop users\*
- Six Voice prompt languages
- Three Speech Rec. Languages
- Supported on CS 1000 / M1 PBX only











#### 1005r Rack-mount Server

1005r / 1002rp / 703t Hardware Comparison			
Platform Features	1005r (Intel based)	1002rp (Radisys/ Trenton Tech)	703t (Intel based)
Form Factor	Rack 2U	Rack 4U	Tower
Memory	1GB Redundant DDR-2 400	512MB PC133	512MB 266DDR
Processor	Dual Xeon 3.2GHz/800MHz FSB	Dual Pentium III 866MHz	Single (Dual capable) Intel Xeon 2.0GHz with Hyper treading technology
SCSI Adapter	One U320 embedded with external connection	1 On board one Ultra SCSI	One Adaptec U320
RAID	Standard Add-On LSI320-1	Standard Add-On LSI320-2 or LSI1600	Standard Add-On LSI320-2 or LSI1600

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1005r Rack-mount Server

1005r / 1002rp / 703t Hardware Comparison			
Platform Features	1005r (Intel based)	1002rp (Radisys/ Trenton Tech)	703t (Intel based)
DVD/CDRW	IDE Standard	IDE standard	IDE standard
Tape Drive	Optional External Tandberg SLR75	Standard Internal Tandberg SLR75	Standard Internal Tandberg SLR75
	(backward read compatible down to SLR4)	(backward read compatible down to SLR4)	(backward read compatible down to SLR4)
Floppy Drive	N/A	Standard	Standard
Hard Drive	2 x 15Krpm 147GB Ultra320 SCSI	6 x 36/73GB Ultra 160 SCSI	2 x 36GB Ultra 320 SCSI



1005r Rack-mount Server

1005r / 1002rp / 703t Hardware Comparison			
Platform Features	1005r (Intel based)	1002rp (Radisys/ Trenton Tech)	703t (Intel based)
Ethernet	Embedded Dual 10/100/1000Mbps	Embedded Dual 10/100Mbps	ELAN 10/100Mbps CLAN 10/100/1000 Mbps Both embedded
Slots	3 Full Size PCI-X 3 Small Profile PCI-X	12 PCI 32/33 (9 usable) 7 ISA and 1 PICMG	2 PCI 32/33 4 PCIX 64/100
Power supply	AC only Dual redundant hot swap 500W auto sensing 110/220V	AC/DC 500W hot swap auto sensing 110/220V	AC 450W(M1) auto sensing 110/220V

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1005r Rack-mount Server



1005r / 1002rp / 703t Hardware Comparison			
Platform Features	1005r (Intel based)	1002rp (Radisys/ Trenton Tech)	703t (Intel based)
System fans	4 FRU system fans also servicing processors	Two hot swap plus one for each processor. Processor fans are not replaceable.	Four plus one for the processor, all FRU
I/O	VGA, 1 Serial 3USB, 2IDE embedded, 1 Ext SCSI	VGA, 2 Serial one Parallel, 2 IDE embedded	VGA, 4 USB, 2 Serial, 1 Parallel, 2IDE embedded
Alarm and error reporting	Through SEL	N/A	Through SEL

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## The High Capacity Feature

#### **CallPilot Overview**

#### 1005r Rack-mount Server – High Capacity

#### > High Capacity Feature:

- Three MPB96 cards installed in the full sized PCI card slots
  - 192 Voice Channels
  - 96 Fax Channels
  - 48 Speech Rec Channels
  - In any combination with a maximum of 288 MPUs
  - Up to 15,500
    Voice Mail users
  - Up to 20,000
    Voice & Desktop
    Messaging users









1005r Rack-mount Server – High Capacity

- > High Capacity Feature:
  - Six MGate cards installed in the switch





## The High Availability Feature

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- > High Availability Feature Introduction
  - Pair of CallPilot 1005r servers provisioned to look to the customer as a single server.
  - Servers run in an Active / Standby configuration. If the active server has a problem, the standby server takes over.
  - Servers are co-located and are connected to the same switch.
  - Each server has its own dedicated connection to the switch (that is, MGate cards and DS30 cables).



- > High Availability Feature Limitations
  - Load balancing is not supported. Only one of the servers in the pair is active at any one time.
  - Geographic redundancy is not supported. The servers must be colocated and be connected to the same switch.
  - Failover is not instantaneous. As the secondary server is brought into service, there can be up to 15 minutes of down time depending on the server configuration.



- > High Availability Feature Software
  - Third party software, EMC AutoStart Agent and Console software is installed and configured on both CallPilot servers.
    - Provides managed IP services that lets a pair of servers look like one server on the ELAN subnet and Nortel Server subnet.
    - Uses additional dedicated LAN connections to provide heart beat and mirroring connections between the servers.
    - Keeps the hard drives on both servers synchronized by mirroring data from the active server to the standby server so that no data is lost in the event of a failover.
    - Monitors the status of both servers in the High Availability pair.
    - Performs an automatic failover to the standby server in the event that a failure condition is detected on the active server.
    - Provides a mechanism for administrator-initiated (manual) failovers.



- > High Availability Feature Failover
  - Automatic failover from the active server to standby server is supported for a limited number of cases:
    - A reboot or shut down of the active server
    - Loss of connection on the ELAN at the TCP/IP level
    - Failure of one, or more, of the critical CallPilot services
  - After an automatic failover, the new standby server must be checked to investigate the cause of the failover and ensure that the server is ready to resume service.
  - At any time the system administrator can initiate a manual failover thought the EMC AutoStart Console software.

1005r Rack-mount Server – High Availability

- > High Availability Feature Services
  - The services shown in the chart are monitored by the EMC AutoStart software.
  - If a service stops and cannot be restarted, it triggers an automatic failover to the Standby server.

*Note:* Services that are managed by the EMC AutoStart software are no longer managed by the CallPilot Service manager.



#### **Controlled by AutoStart**

Adaptive Server Anywhere - DB\_SQLANY CallPilot AOS Service CallPilot HAL Monitor **CallPilot LDAP Service** CallPilot Multimedia Volume 1 CallPilot Multimedia Volume 102 CallPilot Multimedia Volume 103 CallPilot Resource Package 1 CallPilot Resource Package 2 CallPilot Resource Package 3 CallPilot Blue Call Router CallPilot MWI CallPilot Call Channel Router **CallPilot SLEE Service** CallPilot Notification Service CallPilot MTA Service **CallPilot Maintenance Service** Provider **CallPilot IMA** 

- > High Availability Feature Failover Time
  - Failovers are not instantaneous.
  - Time is required for:
    - Services to shutdown on the Active server
    - DSP Diagnostics to be run on the Standby server
    - Services to start on the Standby server
    - Switch resources to be acquired
  - Failover time can be reduced by disabling DSP diagnostics.

	Failover Time		
	DSP Diagnostics Enabled	DSP Diagnostics Disabled	
1 MPB96 Board (96 Channel – 96 MPU)	10 Minutes	7 Minutes	
3 MPB96 Boards (192 Channel – 288 MPU	15 Minutes	7 Minutes	



#### **Knowledge Check**

#### Question 1

Which two CallPilot server platforms can be purchased for new system installations with CallPilot Release 5.0?

- a) 201i
- b) 600r
- c) 703t
- d) 1005r
### Question 1

Which two CallPilot server platforms can be purchased for new system installations with CallPilot Release 5.0?

- a) 201i
- b) 600r
- c) 703t
- d) 1005r



### Question 2

Which CallPilot servers meet the requirements of the European Union RoHS Directive?

- a) 201i
- b) 600r
- c) 703t
- d) 1005r



### Question 2

Which CallPilot servers meet the requirements of the European Union RoHS Directive?

- a) 201i
- b) 600r
- c) 703t
- d) 1005r



Question 3

True or False The High Capacity feature is available on both the 600r server and the 1005r server.

a) Trueb) False



Question 3

True or False The High Capacity feature is available on both the 600r server and the 1005r server.

a) Trueb) False

### Question 4

When the High Availability feature is implemented, can the two CallPilot 1005r servers be located in separate geographic locations?

a) Yes

b) No

### Question 4

When the High Availability feature is implemented, can the two CallPilot 1005r servers be located in separate geographic locations?

a) Yes b) No



>Lesson 2



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### Lesson 2 Objective



> After this lesson, you will be able to:

- List new Installation features introduced with CallPilot Release 5.0.
- Identify the supported upgrade paths to CallPilot Release 5.0.
- Describe the CallPilot Release 5.0 upgrade process.
- Describe the CallPilot Release 5.0 installation process.



### **New Installation Features**



New Language Prompts

- > New language prompts were created for CallPilot Release 5.0.
  - Language installation must be performed.

Configuration Wizard: Language Source Directory								
Back Next Cancel Help								
Language Source Directory:								
You must have a CallPilot language CD to install or upgrade prompt languages.								
If you are using the CD-ROM drive on the CallPilot server, enter Z: as the Language CD location (Z: is the default drive letter for the CD- ROM drive on the CallPilot server; if this does not work, check the CD-ROM drive letter).								
If the language CD is located or copied on a mapped network drive, enter the exact path to the root directory of the CD.								
n you do not want to make any changes to the languages instaned on the server, select Skip Language instanation, and thek rest to continue.								
Install Language								
Language CD Location z:								
Skip Language installation								
WARNING: You must have at least one prompt language on your server before CallPilot will be able to function. The configuration wizard can be re-run to add the language at a later point in time.								
Parti Navi Canaal Hala								
Dack Next Calcel Help								

### CallPilot Release 5.0 Installation and Upgrade Enhancements 1000 NMS Locations – Overview



- > Enhancement to previous limit of 60 NMS locations
- > Can define up to 1000 NMS locations per CallPilot server
- > Location ID ranges from 0 to 999:
  - System always sets Prime Location ID value to 0.
  - Satellite Locations range from 1 999.
- >When the network tree is expanded, all location names are displayed.
  - Location names are sorted alphabetically.
- > Maintained under:

Messaging -> Message Network Configuration

1000 NMS Locations – Message Network Configuration

> The Message Network Configuration page scrolls down to display all location names.

Home User <del>•</del>	System 🔻	Maintenance  Messaging  Tools  Help									
Location → Messaging → Message Network Configuration											
Message Network Configuration											
Show Details	New Server	New Location Delete									
Print Broad	Icast Addresses	Print Selected Print All Servers Help									
Please click on a server or location and then press Show Details button to see the properties.											
👔 Local Server	Maintenance										
😑 🖪 Belleville	-Server										
₽ ABE	RFOYLE										
	ILL										
₽АСТ	INOLITE										
	ISON										
🗐 ADE	LAIDE										
🗐 AGI	ICOURT										
🗐 AHM	IIC HARBOUR										
I AILS	A CRAIG										
airt 🗐	.IE										

1000 NMS Locations – Affected Screen Displays (1 of 2)

>When adding or modifying users, the Location Name dropdown list displays up to 1000 locations.



1000 NMS Locations – Affected Screen Displays (2 of 2)

### > Location ID drop-down list on Message Network Configuration page displays 1-999.



1000 NMS Locations – Networking with Older Systems

- > Networking with older systems does not fully support 1000 locations.
  - Administrator at older systems cannot configure 1000 locations on the older systems.
  - Users on the older systems cannot send to locations with IDs higher than 59.
  - Users on older systems can receive from locations with IDs greater than 59, but the envelope for those locations are identified as deleted sites because location numbers not in the networking list are assumed to have been deleted.
  - Recipients at locations with IDs greater than 59 are tagged as belonging to deleted locations.

New Hard Disk Drive Requirements

- > Minimum drive size requirements:
  - 201i, 1 x 20 GB (new)
  - 600r, 1 x 70 GB
  - 703t (RAID), 2 x 36 GB
  - 1002rp (RAID), 6 x 36 GB (new)
  - 1005r (RAID), 2 x 140 GB
- > New disk volume allocation:
  - C: OS + page file + CP Mgr
  - D: CallPilot server
  - E: Database
  - F: MMFS/Appbuilder Apps

*Note:* The new disk volume allocation requirements apply to all supported CallPilot servers except the 201i.



New Hard Disk Drive Requirements

- > Hard disk drive replacement is required when the Upgrade wizard warns that the drive is too small.
  - Complete Upgrade wizard to create a database backup.
  - For 201i:
    - Before imaging, replace drive.
    - Install new image.
    - Complete the Setup Wizard and restore the database.
  - For 1002rp:
    - Before imaging, replace drive.
    - Reconfigure RAID.
    - Install CP5.0 S/W image.
    - Complete the Setup Wizard and restore the database.





**New Keycode Enabled Features** 

- > CallPilot Release 5.0 introduces two new keycode controlled features:
  - Voice Forms:
    - CallPilot Voice Forms feature is based on the Meridian Mail Voice Forms feature.
    - A Voice Form provides an electronic equivalent of a paper form.
    - A Voice Form can be a standalone application or can be integrated with other CallPilot applications.
    - Voice Forms can be used to collect information from external sources such as customers or potential clients or from internal sources such as employees.
  - High Availability:
    - 1005r server
    - CS 1000 / Meridian 1 PBX connectivity only
    - Not supported with Contact Center integration

New Keycode Enabled Features

eatu	re Verification:										
The following table contains the configuration information from your keycode. Ensure that the details match your											
expectations. If a feature is missing or a value is not what you expected, contact your distributor to obtain a											
keycode.											
Serial number: TRAINING Keycode: A1A1 B2B2 C3C3 D4D4 E5E5 E6E6 G7G7 H8H8											
.0,00											
tatus	Feature	Current Keycode	Previous Keycode	Number Used							
<u> </u>		IPE 2011	IPE 2011								
<u> </u>	Switch Type	Ivieridian I	Meridian I								
<u> </u>	Switch Connectivity	Proprietary CII	Proprietary CT								
<u>_</u>	Max Voice Channels	12	12								
<u> </u>	Max Fax Channels	2	2								
٢.	Max Automated Speech Recognition Channels	2	2								
۲.	AppBuilder Fax	Yes	Yes								
۲.	Networking	Yes	Yes								
۲.	Network Message System	Yes	Yes								
≮.	Max Voice Message Seats	100	100	14							
<.	Max Fax Message Seats	100	100 100	12							
٢.	Max Desktop Message Seats	100		12							
<.	Max Automated Speech Recognition Message Seats	100	100	12							
<	Max E-mail by phone Message Seats	100	100	12							
<	Max Prompt Languages	6	6								
1	Max Automated Speech Recognition Languages	3	3								
1	Storage Hours	350	350								
1	Directory Synchronization	Yes	Yes								
۲.	Voice Forms	Yes	Yes								
<	High Availability	None	None								
_	1										





Sybase Database Upgrade

- > The database was upgraded to Sybase 9.0.2 from 7.0.2 to:
  - Maintain support for the product.
  - Take advantage of better error recovery.
- > The upgrade is integrated into the CallPilot 5.0 installation and will be transparent to all users.

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# CallPilot Release 5.0 Installation and Upgrade Enhancements



Decouple Server Database from Server Name

- > In previous releases, the Computer Name had to match the server name in the database.
  - Names were checked in the Installation and Configuration process to verify.
  - If Computer Name was changed in Windows functionality, the database would not be accessible.
- > With Release 5.0, the server name in the database is decoupled from the Computer name.
  - All access to the database is now done through the database name only.
  - Change implemented to accommodate the High Availability feature.



License Reduction – Overview

- >When upgrading to a new release of CallPilot, the number of reserved seats can now be reduced.
- > A new keycode can reduce the number of reserved seats to a minimum of the number of currently used seats.
- >When running the Upgrade wizard or the Configuration wizard, the number of currently used seats is compared to the number of seats allowed by the keycode.
- > Reduction applies to voice, desktop, fax, email by phone and speech activated messaging.

License Reduction – Server Settings

> On the Server Settings page, select Resources from the View Server Settings for a drop-down list to view keycode values installed in the server and the number of resources currently used by the system.





# Supported Upgrade/Migration Paths to CallPilot Release 5.0

Minimum Supported Software

- > Minimum supported software upgrade/migration paths to CallPilot Release 5.0:
  - CallPilot Release 2.02 02.01.27.05 with SU4
  - CallPilot Release 2.5 02.50.06.14 with SU2
  - CallPilot Release 3.0 03.03.06.02 (GA) or greater
  - CallPilot Release 4.0 04.04.04.00 (GA) or greater





Supported Server Platforms – CS 1000 / Meridian 1

> CallPilot CS 1000 / Meridian 1 server platforms supported for upgrade / migration to Release 5.0.

Supported Upgrade / Migration Paths										
CS 1000 /		Destination								
Meric	dian 1	200i	201i	600r	702t	703t	1001rp	1002rp	1005r	
	200i			yes					yes	
	201i		yes	yes					yes	
	600r			yes					yes	
Source	702t			yes					yes	
	703t					yes			yes	
	1001rp								yes	
	1002rp							yes	yes	
	1005r								yes	



Supported Server Platforms – T1/SMDI

> CallPilot T1/SMDI server platforms supported for upgrade / migration to Release 5.0.

Supported Upgrade / Migration Paths									
T1/SMDI		Destination							
		200i	201i	600r	702t	703t	1001rp	1002rp	1005r
	200i								
	201i								
	600r								
Source	702t								
	703t								
	1001rp							yes	
	1002rp							yes	
	1005r								



### Question 1

How many NMS locations are supported with CallPilot Release 5.0?

- a) 50
- b) 100
- c) 750
- d) 1000



### Question 1

How many NMS locations are supported with CallPilot Release 5.0?

- a) 50
- b) 100
- c) 750
- d) 1000

### Question 2

When upgrading a 201i server to CallPilot Release 5.0, what is the required hard drive size?

- a) 1 x 20 GB
- b) 1 x 70 GB
- c) 2 x 36 GB
- d) 2 x 140 GB

### Question 2

When upgrading a 201i server to CallPilot Release 5.0, what is the required hard drive size?

# a) 1 x 20 GB

- b) 1 x 70 GB
- c) 2 x 36 GB
- d) 2 x 140 GB



### Question 3

You are planning an upgrade to CallPilot Release 5.0 on a 1002rp server connected to a CS 1000 system. Which hardware platform(s) support this upgrade?

- a) 600r
- b) 703t
- c) 1002rp
- d) 1005r



### Question 3

You are planning an upgrade to CallPilot Release 5.0 on a 1002rp server connected to a CS 1000 system. Which hardware platform(s) support this upgrade?

- a) 600r
- b) 703t
- c) 1002rp
- d) 1005r



# The CallPilot Release 5.0 Upgrade Wizard

Upgrade Wizard Introduction



- > Download the latest version of the CallPilot 5.0 Upgrade Wizard from Nortel in the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl.
- > Download and unzip the CallPilot 5.0 Upgrade Wizard PEP to the D:\temp\UpgradeWizard directory.
- If Web access is not available, a version of the CallPilot
   5.0 Upgrade Wizard is available on the SU/PEP CD.

*Note:* You can download and run the CallPilot 5.0 Upgrade Wizard remotely without a technician on-site.


**Upgrade Wizard Introduction (Continued)** 

- > The CallPilot 5.0 Upgrade Wizard checks to verify that your CallPilot system is ready for an upgrade; it does not make any changes to your system.
- > The CallPilot 5.0 Upgrade Wizard performs the following tasks:
  - Platform validation (software and hardware)
  - Data validation
  - Keycode validation
  - System backup



**Upgrade Wizard Introduction (Continued)** 

- > The CallPilot 5.0 Upgrade Wizard has several optional exit points that you can use to perform the upgrade preparation tasks in three phases:
  - Phase 1 Check for platform and software validity in advance of the actual upgrade.
  - Phase 2 Validate your existing data prior to the upgrade.
  - Phase 3 Complete the wizard to fully prepare for upgrade.

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CallPilot Release 5.0

# **Upgrade Wizard Introduction (Continued)** > Do not launch or run programs or utilities during the

**Supported Upgrade/Migration Paths** 

- upgrade. > Do not use Windows Explorer to copy files or to scan disk
- drives during an upgrade as this can cause the upgrade to fail
- > You can run the CallPilot 5.0 Upgrade Wizard while the CallPilot 2.02 (2.01.27.05), 2.5, 3.0, or 4.0 system is fully operational.
- > You can exit the wizard at any point, make the necessary changes to CallPilot, and rerun the CallPilot 5.0 Upgrade Wizard without harming your system.





Upgrade Wizard Installation

- Download and unzip the CallPilot 5.0 Upgrade Wizard PEP to the D:\temp\UpgradeWizard directory.
- 2. Navigate to the **D:\temp\UpgradeWizardInstaller** folder and double-click the **UpgradeWizardInstaller.exe** file.
- 3. The Welcome screen appears.

- 4. Read the information on the Welcome screen and exit any open Windows programs.
- 5. Click **Next** to continue.





- 6. The Choose Destination Location window appears.
- 7. If the suggested destination folder is not suitable, click **Browse** and choose a different location for the CallPilot 5.0 Upgrade Wizard installation.
- 8. Click Next to continue.







- 9. The Start Installation screen appears.
- 10. Click Next to continue.



覺 Start Installation		×
> THIS IS NEORTEL	You are now ready to install CallPilot 5.0 Upgrade Wizard. Press the Next button to begin the installation or the Back button to reenter the installation information.	
	< <u>B</u> ack [ <u>N</u> ext>] Cancel	

Upgrade Wizard Installation (Continued)

11. The system installs the CallPilot 5.0 Upgrade Wizard on the CallPilot server.





- When the installation is complete, the Installation Complete window appears.
- 13. Click Finish.

월 Installation Complete		×
> THIS IS NEORTEL	CallPilot 5.0 Upgrade Wizard has been successfully installed. Press the Finish button to exit this installation.	
	< <u>B</u> ack <b>Einish &gt;</b> Cancel	



**Upgrade Wizard Flowchart Legend** 



**Proceed / Next** 

Normal Screen



Warning Error Screen



**Blocking Error Screen** 

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Upgrade Wizard Flowchart (Continued)



#### CallPilot Release 5.0 Supported Upgrade/Migration Paths Running the CallPilot Release 5.0 Upgrade Wizard



>While the CallPilot 5.0 Upgrade Wizard runs, all screen information is written to the log file at D:\Nortel\Data\UpgradeWizard.log.

- > Upgrade Wizard -Welcome screen
  - Click Next to determine if your hardware and software can be upgraded to CallPilot 5.0.





- > The Platform Validity Check screen lists the software and hardware currently on the system and evaluates the status of each item.
- > Changes include physical drive size checking for the 703t,1002rp and 1005r.



Upgrade Wizard Changes for Release 5.0

> New Upgrade Wizard CallPilot 4.0 Enhanced Security PEP - Blocking Error screen

🛰 Upgrade Wizard - CP4.0	Enhanced Security PEP Warning	New for CallPilot 5.0
	WARNING: CP4.0 ENH	IANCED SECURITY PEP LOADED
> CALLPILOT UPGRADE WIZARD	The wizard has detected that the Enl system. Upgrades for systems with the Enhar	nanced Security PEP (CP404S01R05S) is installed on the nced Security PEP to CPS.0 are not supported.
	Cancel < <u>B</u> ack <u>M</u> ext >	Enish



Running the CallPilot Release 5.0 Upgrade Wizard

> Upgrade Wizard Unsupported RAID Subsystem Configuration – Warning screen (after Platform Validation screen)

Wizard - Unsup	ported RAID Subsystem Configuration	
Ø	The wizard has detected that the RAID subsystem on the CallPilot server does not meet the minimum requirements in order to run CallPilot 5.0. You must update the RAID subsystem so that it meets the minimum requirements before you can complete the upgrade to CallPilot 5.0. The components that do not meet the minimum requirements are:	
> CALLPILOT UPGRADE WIZARD	- RAID driver: 4.10	
NORTEL	In order to update the RAID subsystem, follow the procedures outlined in the RAID update package that is available for download from the Enterprise Solutions PEP Library (ESPL) web site (http://www.nortel.com/espl) and on the CallPilot SU/PEP CD. You can click on Next to continue and run the wizard to validate your data but you will not be able to generate the required badup of the server and complete the wizard until the RAID subsystem has been updated to meet the minimum requirements.	
	Cancel < <u>B</u> ack <u>Next &gt;</u> Enish	



Running the CallPilot Release 5.0 Upgrade Wizard

> New Upgrade Wizard 1st Hard Drive Size – Warning screen (after Platform Validation screen)

۹.».	New for CallPilot 5.0
WARNING: UNSUPPOR	TED HARD DRIVE SIZE
CALLPILOT UPGRADE WIZARD The wizard has detected that your seve logical/physical Hard Drive size. If you are migating to a new server, yo If you are upgrading the server to CallF physical hard drives and/or reconfigure Detailed instructions on these processes	er is currently running with an unsupported u do not have to make any changes. Pilot 5.0 then you have to replace one or more the logical drive sizes. s can be found in the CallPilot 5.0 Upgrade Guide.
NQRTEL	
Please refer to the UpgradeWizard log l Cancel < Back	file for further drive details. View Log



- > New Unsupported IMAP Authentication Option – Warning screen.
  - The IMAP CRAM-MD5 Challenge Response option is selected and is no longer supported on CP5.0.

	New for CallPilot 5.0
💙 Upgrade Wizard - IM/	AP Challenge Response Auth Method Warning
Ø	WARNING: UNSUPPORTED IMAP AUTHENTICATION OPTION
> CALLPILOT UPGRADE WIZARD	The CallPilot server currently has the Challenge/Response authentication method selected for IMAP sessions. This authentication method is no longer supported in CallPilot 5.0. If you leave the setting as it is, after the upgrade is complete messages may not be able to be delivered using IMAP until a new IMAP authentication method is selected. It is recommended that you select another authentication method prior to upgrading to avoid a potential service interruption. The IMAP authentication options can be found in CallPilot Manager under Messaging->Internet Mail Clients.
NORTEL	
	Cancel < Back Next > Finish



- > New Unsupported SMTP Authentication Option – Warning screen.
  - The SMTP CRAM-MD5 Challenge Response option is selected and is no longer supported on CP5.0.

	New for CallPilot 5.0
∜Upgrade Wizard - SM	TP Challenge Response Auth Method Warning
Ø	WARNING: UNSUPPORTED SMTP AUTHENTICATION OPTION
	The CallPilot server currently has the Challenge/Response authentication method selected for SMTP sessions. This authentication method is no longer supported in CallPilot 5.0.
> CALLPILOT UPGRADE WIZARD	If you leave the setting as it is, after the upgrade is complete messages may not be able to be delivered using SMTP until a new SMTP authentication method is selected. It is recommended that you select another authentication method prior to upgrading to avoid a potential service interruption.
	The SMTP authentication options can be found in CallPilot Manager under Messaging->Message Delivery Configuration->Security Modes for SMTP sessions.
NORTEL	
	Cancel < Back Next > Einish



- > Optional Exit Point:
  - When the platform and software validity check is complete, the CallPilot 5.0 Upgrade Wizard confirms that your hardware and software meet the requirements for an upgrade. You can do one of the following:
    - 1. Exit the wizard by clicking **Cancel**.
    - 2. Click **Next** to continue to the next step.

YUpgrade Wizard - Platfor	m Validity	Check		_ 🗆 >
Ø	Perfo The follo hardware	Drming Platform Va wing table contains information a e and software requirements for	lidity Check bout your platform. It deter upgrade to the latest releas	mines if the platform meets e of CallPilot.
> CALLPILOT	Platform:	: IPE 201i	Platfo	rm Migration required: No
	Status	Item Name	Current Value	Required Value
WIZARD		Software Version	4.0 (04.04.04.00)	4.0 (04.00.00.00)
	✓	SU Version		
	V	Number of CPU	1	1
	1	CPU Speed (MHz)	300	300
	1	Server BIOS Version	6.0.3	6.0.3
NØRTEL	1	RAM Size (MB)	256	256
	✓	Number of Logical Drives	1	1
	✓	Logical Disk 0 (MB)	39260	20000
Run Platform Validity				
Спеск				
Result: <b>The platform v</b>	alidity chec	k is complete. Click Next to	continue.	
	Cancel	<pre> &lt; Back Next &gt;</pre>	Einish	



- > Prepare for Data Validation screen:
  - You can run this next step while the CallPilot server is processing calls, but the validation check uses considerable CPU resources. Nortel recommends that you validate your data when the call processing load is low.



- > The data validity check ensures that the current database is consistent with the database requirements of the latest CallPilot release.
  - In case of inconsistency, you have a chance to investigate and correct the problem.
  - You can click the Retry button to re-run the tool.







- > Optional Exit Point:
  - The wizard confirms that your data can be upgraded.
  - In the next step, you must insert the Image CD / DVD in the drive. If you are running the wizard remotely, you must exit at this point.
    - 1. Exit the wizard by clicking **Cancel**.
    - 2. Click **Next** to continue to the next step.





- > Serial Number and Key Code screen:
  - Enter your serial number and new CallPilot 5.0 keycode.
  - Click **Next** to continue.

Vpgrade Wizard - Ser	rial Number & Key Code	<u> </u>
	Serial Number and Key Code	
	Enter your new CallPilot 5.0 serial number and key code.	
> CALLPILOT	Serial number from software feature key: TRAINING	
WIZARU	Serial Number: TRAINING	
NØRTEL	Key Code:         A1A1         B2B2         C3C3         D4D4         E5E5         F6F6         G7G7	Н8Н8
	Cancel Cancel Next > Einish	



- >Keycode
  - Verification screen:
  - New Used column for seats.

<b>E</b>	The follow details ma contact y	ving table contains the con atch your expectations. If our distributor to obtain a	figuration information fr a feature is missing or a new key code.	om your keycode. Ensu value is not what you e	re that the xpected,
CALLPILOT JPGRADE	Serial nur Key code	nber: TRAINING : A1A1 B2B2 C3C3	D4D4 E5E5 F6F6 G70	Platform Mig <b>G7 H8H8</b>	ration: <b>No</b>
NIZARD	Status	Feature	Current Keycode	New Keycode	Used 🔺
	J	Hardware Platform	201i	201i	
	J	Switch Type	M1	M1	
	J	Switch Connectivity	Proprietary CTI	Proprietary CTI	
	Ĵ	Voice Channels	12	12	
NØRTEL	Ĵ	Fax Channels	2	2	
	Ĵ	ASR Channels	2	2	
	V	TTS Channels	20	20	
	1 V	Conference Channels	0	0	
	V	Directory Sync	Yes	Yes	
	1 V	AppBuilder	Yes	Yes	
	1	Networking	Yes	Yes	
	V	NMS	Yes	Yes	
	•				
aculty — Koycodo Vali	idation is co	omplete. Click Next to c	ontinue.		



- >Keycode
  - Verification screen:
  - Added new Voice Forms and High Availability

The det. con Seri	Following table contains ails match your expectal tact your distributor to d ial number: <b>TRAININ</b>	s the configuration informati tions. If a feature is missing obtain a new key code. <b>\G</b>	on from your keycode. Ens or a value is not what you Platform Mi	ure that the expected, igration: <b>No</b>
UPGRADE Key	code: A1A1 B2B	B2 C3C3 D4D4 E5E5 F6F6	G7G7 H8H8	
WIZARD		Carrone Keycod	e now keycode	Used 4
	Voice Forms	No	Yes	
l l l	HA/GR	None	None	
	Yoice Seales	100	100	20
- I I I I I I I I I I I I I I I I I I I	Fax Seats	100	100	10
NØRTEL 🗸	Desktop Seats	100	100	10
l l l l l l l l l l l l l l l l l l l	ASR Seats	100	100	10
V	TTS Seats	100	100	10
J.	TTS Languages	10	10	
1	Prompt Languag	jes 6	6	
J.	ASR Languages	3	3	
V	Storage Hours	350	350	
•				



- > High Availability and Contact Center:
  - Blocking Error screen

	New for CallPilot 5.0
Ҟ Upgrade Wizard - KeyC	ode - High Availability and Call Center incompatibility.
	High Availabilty and Call Center Integration are incompatible.
	The wizard has detected that the system has a call center server configured and the new CP5.0 keycode includes the High Availability feature.
> CALLPILOT	The High Availability feature is incompatible with Call Center Integration.
WIZARD	Please contact your appropriate support channel to obtain a new CP5.0 keycode without High Availability or unconfigure Call Center Integration.
NØRTEL	
·	
	Cancel < Back Next > Enish



Now for CollDilot 5.0

- > Maximum Number of Seats is Too Low
  - Blocking error screen

W Upgrade Wizard	
CallPilot Upgrade Wizard	Error: Maximum Number of Seats is Too Low The new keycode must have a maximum number of seats that is at least equal to, or greater than, the number of seats that are currently configured on the server. This rule applies to the following resources: voice messaging, fax messaging, desktop messaging, speech activated messaging and email by phone (text to speech) seats. The keycode entered has a lower maximum number of seats than the number of seats that are currently configured on the server for one, or more of the resources listed above. In order to continue with the upgrade you either need to reduce the number of seats that are currently configured on the server so that the number of seats that are currently configured on the server so that the number used is less than or equal to the maximum allowed in the new
	Cancel < Back Next>



- > Validate Image Media screen:
  - Insert the CallPilot
     5.0 Image CD or
     DVD into the CD or
     DVD drive, and enter
     Z:\ as the drive letter.
  - Click Next and wait while the wizard checks that the inserted CD or DVD is valid for your platform.





- > Incorrect CallPilot Image Media Detected
  - Blocking Error screen

💙 Upgrade Wizard - Image I	Media Validation - Incorrect CallPilot Image Media	<u> </u>
	Incorrect CallPilot Image Media Detected	
	Based on the new Callpilot keycode the disk currently inserted in the CD/DVD-ROM drive is not correct. The wizard has detected the following:	:
> CALLPILOT UPGRADE WIZARD	- Unable to read the disk or the disk is not disk 1 of the CallPilot software image.	
	Click the Back button to retry.	
	Cancel < Back Mext > Einish	



Running the CallPilot Release 5.0 Upgrade Wizard

> Optional Language CD Validation screen

	New for CallPilot 5.0
💙 Upgrade Wizard - Optio	nal Language CD validation
	Optional Language CD validation
> CALLPILOT UPGRADE WIZARD	With the release of CallPilot 5.0, new language prompts have been introduced. In order to successfully configure a CallPilot 5.0 server, a CallPilot 5.0 Language CD is required during the language installation portion of the Config Wizard. The Config Wizard will not allow languages to be installed/reinstalled from a pre-CallPilot 5.0 Language CD. In order to avoid installation delays, in not having to the correct language CD, it is strongly recommend that the language CD is verified.
NORTEL	Validate Language CD
	C Skip Language CD Validation
	Cancel ( <u><back< u="">) Next &gt; ⊡nish</back<></u>



Now for CollDilet 5.0

Running the CallPilot Release 5.0 Upgrade Wizard

#### > Language CD Validation screen

💙 Upgrade Wizard - Langu	age CD validation	
	Language CD validation	
> CALLPILOT UPGRADE WIZARD N@RTEL	With the release of CallPilot 5.0, new language prompts have been introduced. In order to successfully configure a CallPilot 5.0 server, a CallPilot 5.0 Language CD is required during the language installation portion of the Config Wizard. The Config Wizard will not allow languages to be installed/reinstalled from a pre-CallPilot 5.0 Language CD. In order to avoid installation delays, in not having to the correct language CD, it is strongly recommend that the language CD is verified. Please insert the language CD for verification.	
	Enter the CD/DVD-ROM Drive ( in format <drive letter="">:\ ) Z:\</drive>	
	Cancel < Back Next > Binish	



- > Invalid Language CD:
  - Blocking Error screen

		New for CallPilot	<b>5.0</b>
💙 Upgrade Wizard - Invalid	Language CD		
	Invalid Language CD		
> CALLPILOT UPGRADE WIZARD	The wizard has detected that the fo	lowing issues with the Language CD:	
N©RTEL	- The language prompt version of 5.	00.41.02 is not valid for CallPilot 5.0.	
	Click the Back button to retry.		
	Cancel < <u>B</u> ack <u>M</u> ext >	Einish	



- > Select Backup Medium screen
- > Optional Exit Point:
  - Do not proceed to the next step until you are ready to take the system offline and complete the upgrade.
    - To exit, click **Cancel**.
    - To continue, select the type of backup medium and click Next.

Vpgrade Wizard - Full Syst	tem Backup	
	Select Backup Medium	
	Select the backup medium: backup to a tape or backup to a shared remote disk.	
> CALLPILOT UPGRADE WIZARD		
	Select the following Options:	
	C Backup to Tape	
NØRTEL	C Backup to Remote Disk	
Bac	kup Initialization succeeded. Please select an option for Backup Medium, then click Next to cor	ntinue.
	Cancel < <u>B</u> ack <u>Next</u> > Einish	


Running the CallPilot Release 5.0 Upgrade Wizard

#### CAUTION ANY MESSAGES RECEIVED AFTER BACKUP BEGINS ARE LOST DURING THE SYSTEM UPGRADE

The backup takes from 1 to 3 hours to complete and consumes considerable CPU resources. Any messages that come in while the backup is running are not included in the backup. To avoid losing any user messages, Nortel recommends that you courtesy down the system prior to starting the backup.



- > Select Backup Medium screen.
- > Backup to Remote Disk:
  - WARNING: Ensure that the network connections to remote disk are configured.

🞌 Upgrade Wizard - Ful	l System Backup	
	Select Backup Medium	
	Select the backup medium: backup to a tape or backup to a shared remote disk.	
> CALLPILOT UPGRADE WIZARD		
	Select the following Options:	
	O Backup to Tape	
NØRTEL	Backup to Remote Disk	
	Make sure that your backup device was already added to a list of backup devices. If not, please log in to the CP Manager, then select 'Add Backup Device' to add your backup device Click Next to continue.	
	WARNING: Ensure that network connections to remote disk are configured.	
-		
	Cancel < Back Next > Einish	



Running the CallPilot Release 5.0 Upgrade Wizard

- > List Backup Devices screen:
  - 1. Click the List **Devices** button.
  - 2. Select backup device and click **Next** to continue.
  - 3. When the **Perform System Backup** screen appears, click **Start Backup**.

🕆 Upgrade Wizard - Full System Backup	
Click the button "List Device". A list of backup devices is displayed in the box below. You need to select one of backup devices to be backed up, then click Next to continue.	
CALLPILOT UPCRADE WIZARD List Devices Deration Name: Backup to remote Disk Operation Status: Success. Result: Operation succeeded. Click Next to continue.	
Device Name Device Path	
Backup8      \\(192.168.122.208\Backup8	
Cancel < <u>B</u> ack <u>N</u> ext > Einish	

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- > Select Backup Medium screen.
- > Backup to Tape:
  - Insert the tape into the tape drive and click Next to start the backup.
  - Warning: The backup overwrites all data on the tape.

Vpgrade Wizard - Full 9	System Backup	
	Select Backup Medium	
	Select the backup medium: backup to a tape or backup to a shared remote disk.	
> CALLPILOT UPGRADE WIZARD		
	Select the following Options:	
	Backup to Tape	
N@RTEL	C Backup to Remote Disk	
	Please insert your tape into tape drive and click Next to start the backup.	
	Warning: The backup will overwrite all data on the tape.	
	Cancel  < Back	



- > Perform System Backup screen:
  - 1. Click the **Start Backup** button.
  - 2. When the backup completes, click **Next** to continue.
  - Warning: The backup operation is disk and CPU intensive.

💙 Upgrade Wizard - Full S	ystem Backup				
	Perform Sy	rstem Backup			
	Please click the "Start Backup" button to initiate a full system backup. The operation takes about 20 minutes to few hours to complete, depending on the platform type. When the backup completes, click Next to continue.				
> CALLPILOT UPGRADE WIZARD	WARNING: The bac CallPilot server is p load on the server i	kup operation is disk and CPU intensive. It can be run wl rocessing calls, however, it should be run when the call p is low.	nile the processing		
	Start Backup	Progress:			
NORTEL	<u></u>	I Operation Name:			
NORTEC		Operation Status:			
Result:					
		View Summary Backup Log View Detailed	Backup Log		
	Cancel < B	ack Next > Finish			



- > Perform System Backup screen:
  - Tape is being retensioned.

💙 Upgrade Wizard - Full	l System Backup	
Ø	Perform System Backup Please click the "Start Backup" button to initiate a full system backup. The operation takes about 20 minutes to few hours to complete, depending on the platform typ When the backup completes, click Next to continue.	pe.
> CALLPILOT UPGRADE WIZARD M@RTEL	WARNING: The backup operation is disk and CPU intensive. It can be run while th CallPilot server is processing calls, however, it should be run when the call process load on the server is low.        Start Backup      Progress:        Operation Name:      Operation Status:        Berget Dope:      Number of Errorg.	e sing
Result: 1	Tape is being retensioned. Please wait    Cancel    < Back    Next	



- > Perform System Backup screen:
  - Progress:, Operation Status:, Percent Done:, and Number of Errors are displayed.

Vpgrade Wizard - Full 9	5ystem Backup					_ 🗆 🗵
	Perform Sy	stem Backu	р			
	Please click the "Start Backup" button to initiate a full system backup. The operation takes about 20 minutes to few hours to complete, depending on the platform type. When the backup completes, click Next to continue.					э.
> CALLPILOT UPGRADE WIZARD	WARNING: The bac CallPilot server is p load on the server i	kup operation is o rocessing calls, ho s low.	lisk and CPU i owever, it sho	ntensive. It can be uld be run when th	run while the e call process	ing
	Start Backup	Progress:				
		, Operation Name:	IPESystemBac	kup 070201 1201		
N@RTEL		Operation Status:	Running.			
		Percent Done:	83%	Number of Errors:	0	
Result: <b>B</b> a	ackup in progress. Plea	ase wait				
	Cancel < B	ack <u>N</u> ext >	Einis	h		



- > Perform System Backup screen:
  - Eject tape message

YUpgrade Wizard - Full 9	iystem Backup	
	Perform System Backup	
	Please click the "Start Backup" button to initiate a full system backup. The operation takes about 20 minutes to few hours to complete, depending on the platform type When the backup completes, click Next to continue.	
UpgradeWizard		×
Please during	eject the tape to avoid possible long delays when listing the backups on the tap the Setup Wizard.	ie
Result: Ba	ackup in progress. Please wait	
	Cancel < Back Next > Einish	



- > Perform System Backup screen:
  - Result: Backup successfully completed.
  - Click **Next** to continue.

👋 Upgrade Wizard - Full S	iystem Backup					
	Perform Sy	ystem Backuj	р			
	Please click the "Start The operation takes a When the backup com	Backup" button to ini bout 20 minutes to fe ppletes, click Next to c	tiate a full syste w hours to com continue.	em backup. Iplete, depend	ling on the p	latform type.
> CALLPILOT UPGRADE WIZARD	WARNING: The bac CallPilot server is p load on the server	ckup operation is d processing calls, ho is low.	lisk and CPU i owever, it sho	ntensive. It ould be run v	can be run when the ca	while the Ill processing
	Start Backup	Progress:				
		Deration Name:	IPESystemBac	kup 070201 1	201	
NORTEL		Operation Status:	Successfully	completed		
		Percent Done:	100%	Number of	Errors: 0	
Result: Ba	ckup successfully co	mpleted. Click Nex	t to continue			
		View	/ Summary Back	up Log	View Deta	iled Backup Log
	Cancel	Back <u>N</u> ext >	Einis	h		



Running the CallPilot Release 5.0 Upgrade Wizard

> Upgrade Wizard Second Hard Drive Size – Warning screen (after backup and before Finish screen)



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- > Upgrade Wizard Finished screen:
  - Final screen in the upgrade wizard.
  - Click Finish to close the CallPilot 5.0 Upgrade Wizard.

🔨 Upgrade Wizard - Finshed	
	Phase 1 of the Upgrade to CallPilot 5.0 is complete
	Based on the information gathered by the wizard you are upgrading to CallPilot 5.0 on the same server platform.
> CALLPILOT UPGRADE WIZARD	If your platform is a 703t, 1002rp or 1005r you have the option of breaking RAID sync in order to provide a quick fallback path.
	. Break RAID sync - 703t, 1002rp, 1005r
N©RTEL	Please ensure that the first CallPilot Image CD is in the CD-ROM drive and then reboot the server to boot from the CD-ROM. Note that when you reboot the server it may be necessary to change the BIOS option to enable booting from CD-ROM.
	Cancel < Back Mext > Finish



Question 4

True or False You must shut down the CallPilot server to run the Upgrade Wizard.

- a) True
- b) False



Question 4

True or False You must shut down the CallPilot server to run the Upgrade Wizard.

a) Trueb) False

#### Question 5

The CallPilot 5.0 Upgrade Wizard has several optional exit points that you can use to perform the upgrade preparation tasks in three phases. During which phase does the wizard validate your existing data prior to the upgrade?

- a) Phase 1
- b) Phase 2
- c) Phase 3
- d) The wizard does not perform this task

### Question 5

The CallPilot 5.0 Upgrade Wizard has several optional exit points that you can use to perform the upgrade preparation tasks in three phases. During which phase does the wizard validate your existing data prior to the upgrade?

- a) Phase 1
- b) Phase 2
- c) Phase 3
- d) The wizard does not perform this task



#### Question 6

True or False When running the Release 5.0 Upgrade Wizard, you must validate the Release 5.0 Language Prompts CD.

- a) True
- b) False



#### Question 6

True or False When running the Release 5.0 Upgrade Wizard, you must validate the Release 5.0 Language Prompts CD.

- a) True
- b) False



# The CallPilot Release 5.0 Setup Wizard

Setup Wizard Introduction



- > You can only run the CallPilot Release 5.0 Setup Wizard on a system containing a Release 5.0 software image.
  - An existing system where a CallPilot Release 5.0 image was installed as part of an upgrade.
  - A new CallPilot Release 5.0 system received from Nortel for platform migration.
- > The Setup Wizard rechecks for platform and software validity, and then upgrades and restores the database.
  - The Setup Wizard first prompts you to install any outstanding PEPs.
  - The Setup Wizard checks the software and hardware components of your system to ensure that data can be safely restored from the backup onto the server.
  - After a successful system check, the Setup Wizard restores your backed up data from the backup made by the CallPilot 5.0 Upgrade Wizard and then performs a database conversion.

Setup Wizard Caution





### CAUTION

Ensure you use the backup created from the CallPilot 5.0 Upgrade Wizard for the following reasons:

- 1. It provides the most current view of the system.
- 2. The CallPilot 5.0 Upgrade Wizard corrects the data prior to the backup. This ensures a clean backup and a smooth upgrade.
- 3. Using an earlier backup tape can result in issues encountered during the restore and upgrade process under CallPilot 5.0.
- 4. The backup from the CallPilot 5.0 Upgrade Wizard includes the CallPilot 5.0 Upgrade Wizard logs so that they are brought forward to CallPilot 5.0. These logs can be used by NETS in the rare event of an upgrade failure.

Setup Wizard IP Network Settings



If your backup is on a network drive or you are downloading PEPs from the network, you must restore your network settings:

- 1. Specify the **IP address** and **subnet mask** for the Nortel server subnet. Do not change your computer name unless necessary.
- 2. Specify the **gateway** for the Nortel server subnet.
- 3. Restart the system (if prompted by Windows) and log on to the CallPilot server.

Setup Wizard Flowchart Legend



Warning Error Screen Allowed to Proceed



Blocking Error Screen Not Allowed to Proceed









> To access the CallPilot 5.0 Setup Wizard:

Accessing the Setup Wizard

- Log on to the CallPilot server when the Windows Server 2003 minisetup process is completed. The default password for the Administrator account is Bvw250.
  - If you log on to an unconfigured CallPilot server the Setup Wizard launches automatically. A CallPilot server, freshly upgraded to CallPilot 5.0, is not configured.
  - To manually launch the Setup Wizard:
    Start > Programs > CallPilot > Setup Wizard





- > Setup Wizard Welcome screen:
  - Click **Next** to continue.



- > Setup Wizard SU/PEP Installation? screen:
  - If you have SUs or PEPs to install:
    - Select **yes**.
    - Install the SU/PEP
    - Reboot the server (if required)
    - Restart the wizard
  - If you do not have SUs or PEPs to install:
    - Select No.
    - Click **Next** to continue.







- > Setup Wizard Platform Validity Check screen:
  - Ensure that all items pass.
  - Click **Next** to continue.

**CallPilot Setup Wizard - I	Platform Validity C	Chan	ged for C	allPilot 5.0
Performing Platform Validity Check   The table below contains information about your server. This information is checked to make sure that it meets the minimum requirements in order to run the new release of CallPilot.  Depending on the results of the check you may need to update software before running the upgrade or migrate your data to a new CallPilot server platform as part of the upgrade.				
SETUP	Status Item	Name	Current Value	Required Value
WIZARD	J Softy	vare Version	5.0 (05.00.40.23)	5.0 (05.00.00.00)
	J SU V	ersion	,	
	J Numb	per of CPU	1	1
	J CPU	Speed (MHz)	300	300
	J Serve	er BIOS Version	6.0.3	6.0.3
NORTEL	J RAM	Size (MB)	256	256
	J Numb	per of Logical Drives	1	1
	J Logic	al Disk 0 (MB)	39260	20000
	v			
Run Platform Validity Check		analaka Cisle Nauk ka		
		Back <u>N</u> ext >	Einish	

- > Setup Wizard Platform Validity Check screen with errors shown:
  - Correct all issues and rerun the wizard.



Running the CallPilot Release 5.0 Setup Wizard

> Setup Wizard Drive Letter Assignment Error –Blocking Error screen

*CallPilot Setup Wizard -	Platform Validity Check New for CallPilot 5.0
	Drive Letter Assignment Error
	Your drive letter assignment is incorrect and cannot be automatically corrected.
	The required configuration is :
> CALLPILOT SETUP WIZARD	703t / 1005r : C: DISK 0, PARTATION 0 D: DISK 0, PARTATION 1 E: DISK 0, PARTATION 2 F: DISK 0, PARTATION 3 Z: CD-ROM Drive.
NGRTEL	1002rp : C: DISK 0, PARTATION 0 D: DISK 0, PARTATION 1 E: DISK 1, PARTATION 2 F: DISK 2, PARTATION 3 Z: CD-ROM Drive.
	Please go to Computer Management> Storage> Disk Management, and MANUALLY change the drive letter assignments.
	You cannot continue until drive letter is corrected.
	Cancel < Back Next > Enish



- > Setup Wizard Telephony Board Validation screen:
  - 201i server
  - If all results are OK, click Next to continue.

Te In or supp	dephony Board Val der to ensure the stability of the orted. The table below display oards detected do not match d is in the wrong location or the	idation ne server only certain coni s the telephony boards th a supported configuration,	figurations of telephony boards at have been detected on the s	are
CALLPILOT proc	ed with a red X and one or mo nding on the results of the che eed.	ere is an unsupported mixt re error messages will be o eck you may need to move	, i.e. an unsupported board is de ture of boards, the affected boa displayed on the bottom of the p e or remove boards before being	erver. If etected, a ards will be page. g allowed to
SETUP Stat	is Slot Number	PCI Board Type	Eamily	
	1	201i	Nortel	
Result: Telephony boa	nrd validity check is compl	ete. Click Next to conti ext > Einish	inue.	



- > Setup Wizard Telephony Board Validation screen:
  - Server with single MPB96 card.
  - If all results are OK, click Next to continue.

CallPilot Setup Wizard	- Platforn	Validity Check			_ 🗆 🗙
CALLPILOT	Telephony Board Validation In order to ensure the stability of the server only certain configurations of telephony boards are supported. The table below displays the telephony boards that have been detected on the server. If the boards detected do not match a supported configuration, i.e. an unsupported board is detected, a board is in the wrong location or there is an unsupported mixture of boards, the affected boards will be flagged with a red X and one or more error messages will be displayed on the bottom of the page. Depending on the results of the check you may need to move or remove boards before being allowed to proceed.				
SETUP	Status	Slot Number	PCI Board Type	Family	_
WIZARD	Jians /	1	MDR96	Nortel	-
NORTEL					
Result: <b>Telepho</b>	ny board	validity check is co	mplete. Click Next to cor	itinue.	
	Cance	I < <u>B</u> ack	Next > Einish		



- > Setup Wizard Selecting Upgrade of CallPilot screen:
  - Click to select:
    - No, I do not have data to restore.
    - Yes, I do have data to restore.
  - Click **Next** to continue.

CallPilot Setup Wizard -	Selecting Upgrade of CallPilot			
	Selecting Upgrade of CallPilot			
> CALLPILOT SETUP WIZARD	Do you have data to restore? If you are upgrading from a previous release of CallPilot or are performing a platform migrat you had to run the CallPilot upgrade wizard on your original CallPilot server. In both cases th data on your original system was backed up to either tape or a network share. Select one of two options below and click Next to continue.	ion ne		
NGRTEL	Please select the option below			
	🔿 No, I do not have data to restore.			
	C Yes, I do have data to restore.			
Cancel < Back [Next > ]				



- > Setup Wizard Restore Medium Selection screen:
  - Click to select:
    - Restore from Tape.
    - Restore from Disk.
  - Click **Next** to continue.

CallPilot Setup Wizard -	Restore Medium Selection		
	Restore Medium Selection		
	The backup that you created when you ran the upgrade wizard could have written either on tape or a network share. In order to restore the data the wizard needs to know the backup medium.	a	
> CALLPILOT	If you are restoring from tape, insert the tape into tape drive now.		
WIZARD	If you are restoring from a network share ensure that the share where the backup data was stored is shared on the network and accessible from this server. Depending on the configura of your network and Windows domain, you may need to connect to the network share in ord set the correct user ID and password before you can successfully restore from the share.	tion er to	
	Please select the appropriate option from the list of options below, then click Next to continu	e.	
NØRTEL	Please select the option below		
	C Restore from Tape		
	C Restore from Disk		
Restore Initialization s	succeeded. Please select an option for the Restore medium, then click Next to contin	iue.	
Cancel < <u>B</u> ack <u>Next</u> Sinish			



- > Setup Wizard List Backups screen:
  - 1. Click the List Backups button.
  - 2. Select a backup from the list.
  - 3. Click **Next** to continue.

*CallPilot Setup Wizard - List 8	ackups				
	List Backups				
	You need to click the button "List Backups" to start an operation which scans the tape or the shared disk for available backups on tape or on disk, respectively. The available backups are displayed on the list of backups shown below. You need to choose which backup should be restored, by selecting one item from that list.				
> CALLPILOT SETUP WIZARD	When you are done, click Next to continue.				
NORTEL	st Backups Operation Name: Operation Status: Number of Errors:				
Backup ID	Date & Time	Result	Software Version		
IPESystemBackup CPSERVE 07	Wednesday, January 10, 2007 14:56	Success	04.04.04.00-00		
Result: ListBackup Operatio Please select one it	on successfully completed. em from the backup list, then click Next bu incel < <u>B</u> ack <u>N</u> ext >	utton to cor	ntinue.	•	



Running the CallPilot Release 5.0 Setup Wizard

> Setup Wizard Restore Medium Selection screen with Restore from Disk selected.

*CallPilot Setup Wizard - R	estore Medium Selection		
	Restore Medium Selection		
	The backup that you created when you ran the upgrade wizard could have written either on tape or a network share. In order to restore the data the wizard needs to know the backup medium.	a	
> CALLPILOT	If you are restoring from tape, insert the tape into tape drive now.		
WIZARD	If you are restoring from a network share ensure that the share where the backup data was stored is shared on the network and accessible from this server. Depending on the configural of your network and Windows domain, you may need to connect to the network share in orde set the correct user ID and password before you can successfully restore from the share. Please select the appropriate option from the list of options below, then click Next to continue	tion er to e.	
NORTEL	Please select the option below		
	C Restore from Tape		
	Restore from Disk		
	Warning: As the backup resides on the remote disk, please ensure that networ connections are configured correctly on this system, before proceeding to the r screen.	k next	
	Cancel < <u>B</u> ack <u>N</u> ext > ⊟nish		


Running the CallPilot Release 5.0 Setup Wizard

- > Setup Wizard Add Backup Device screen:
  - Enter the following information about the remote drive location:
    - Device Name
    - Device Directory Path
    - User ID
    - Password
  - Click **Next** to continue.

CallPilot Setup Wizard -	Add Backup Device	
	Add Backup De	wice
> CALLPILOT SETUP WIZARD	In order to restore from a needs to know where you Please enter the directory must be in UNC format: \\ \\cpsystem-1\backup2 02. You must ensure that the accessible from this server you may to specify the co share. When you are done, click I	backup that was made to a network share (remote disk), the wizard r backup data is stored on the remote system. path on the remote system where your backup data is stored. The path <remote computer="" name="">\<directory path="">. For example share where the backup data was stored is shared on the network and . Depending on the configuration of your network and Windows domain, rrect User ID and password before you can successfully restore from the Next to continue.</directory></remote>
NØRTEL	Entry Davies Name	Factor Davida Directory Dath.
	RemoteDisk	Liter Device Directory Path:
User-ID:	administrator	The second secon
Password:	*****	
	1	
	Cancel < <u>B</u> ack	Next > Einish

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Running the CallPilot Release 5.0 Setup Wizard

- > Setup Wizard List Backups screen:
  - Click the List Backups button.
  - Select a backup from the list.
  - Click **Next** to continue.

Image: Second Status       List Backups         Vou need to click the button "List Backups" to start an operation which scans the tape or the shared disk for available backups are displayed on the list of backups shown below. You need to choose which backup should be restored, by selecting one item from that list.         CALLPILOT       The available backups are displayed on the list of backups shown below. You need to choose which backup should be restored, by selecting one item from that list.         When you are done, click Next to continue.       When you are done, click Next to continue.         NOTEL       List Backups         NOTEL       Progress         Operation Name:       RemoteDisk         Operation Status:       Success.         Number of Errors:       0         List Backup D       Date & Time         IPESvstemBackup CPSERVE 07       Wednesday, January 10, 2007 14:56         Result:       ListBackup Dperation successfully completed.         Please select one item from the backup list, then click Next button to continue.		- LISC BACKUPS			
You need to click the button "List Backups" to start an operation which scans the tape or the shared disk for available backups on tape or on disk, respectively. The available backups are displayed on the list of backups shown below. You need to choose which backup should be restored, by selecting one item from that list.         YCALLPILOT       The available backups are displayed on the list of backups shown below. You need to choose which backup should be restored, by selecting one item from that list.         VWEARD       When you are done, click Next to continue.         Vietnet       List Backups         Operation Name:       RemoteDisk         Operation Status:       Success.         Number of Errors:       0         List of Backups:       Date & Time       Result         Backup ID       Date & Time       Result       Software Version         IPESystemBackup Operation successfully completed.       Please select one item from the backup list, then click Next button to continue.		List Backups			
> CALLPILOT SETUP WIZARD       When you are done, click Next to continue.         Progress Operation Name:       RemoteDisk Operation Status:         Operation Status:       Success. Number of Errors:         List of Backups:       Date & Time         Backup ID       Date & Time         IPESvstemBackup CPSERVE 07       Wednesday, January 10, 2007 14:56         Result:       ListBackup Operation successfully completed. Please select one item from the backup list, then click Next button to continue.		You need to click the button "List Backup disk for available backups on tape or on The available backups are displayed on I backup should be restored, by selecting	os" to start an operati disk, respectively. the list of backups sho one item from that lis	on which scans the tape or the wn below. You need to choos t.	e shared e which
List Backups       Progress         Operation Name:       RemoteDisk         Operation Status:       Success.         Number of Errors:       0         List of Backups:       Date & Time         Backup ID       Date & Time         IJPESvstemBackup CPSERVE 07       Wednesday, January 10, 2007 14:56         Result:       ListBackup Operation successfully completed.         Please select one item from the backup list, then click Next button to continue.	> CALLPILOT SETUP WIZARD	When you are done, click Next to contin	ue.		
Backup ID       Date & Time       Result       Software Version         IPESystemBackup CPSERVE 07       Wednesday, January 10, 2007 14:56       Success       04.04.04.00-00         Result:       ListBackup Operation successfully completed. Please select one item from the backup list, then click Next button to continue.	NC/RTEL	List Backups Operation Name: Operation Status: Number of Errors:	RemoteDisk Success. O		
IPESystemBackup CPSERVE 07         Wednesday, January 10, 2007 14:56         Success         04.04.04.00-00           Result:         ListBackup Operation successfully completed. Please select one item from the backup list, then click Next button to continue.	Backup ID	Date & Time	Result	Software Version	
Result: ListBackup Operation successfully completed. Please select one item from the backup list, then click Next button to continue.	IPESystemBackup CPSER	VE 07 Wednesday, January 10, 2007 14:56	Success	04.04.04.00-00	
	IPESvstemBackup CPSER Result: ListBackup O Please select	VE 07 Wednesday, January 10, 2007 14:56 peration successfully completed. t one item from the backup list, then click	k Next button to co	ntinue.	



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Running the CallPilot Release 5.0 Setup Wizard

- > Setup Wizard Performing Restore screen:
  - CallPilot services are shut down.
  - The wizard automatically starts the restore operation.
  - The progress bar shows the percent complete and the number of errors.

CollDilet Cotup Wizard	Chart Doctore	
Calipliot Setup Wizard	- Start Restore	
	Performing Restore	
	When you entered this page, the wizard attempted to automatically start restoring your data the CallPilot server. Depending on the server and backup type, the restore operation can tal from 30 minutes to two hours to complete. As the restore progresses the progress bar will up and any error messages or information messages will be displayed below.	a onto ke odate
> CALLPILOT	In the event of a failed restore, the "Start Restore" button will be enabled in order to allow y restart the restore.	ou to
WIZARD	When the operation successfully completed, click Next to continue.	
NGRTEL	Start Restore Progress:	
	Operation Name: IPESystembackup CPSERVE 070110 1456 070110 1754	
	Operation Status: Running.	
	Percencipione: 2% Number of Errors: 0	
Restore Result: Resto	ore in progress. Please wait	
	Cancel < Back Next > Einish	



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Running the CallPilot Release 5.0 Setup Wizard

- > Setup Wizard Performing Restore screen with Operation Status Successfully completed:
  - Click View Log buttons to view restore logs.
  - Click **Next** to continue.

CallPilot Setup Wizard	- Start Restore
	Performing Restore
	When you entered this page, the wizard attempted to automatically start restoring your data onto the CallPilot server. Depending on the server and backup type, the restore operation can take from 30 minutes to two hours to complete. As the restore progresses the progress bar will update and any error messages or information messages will be displayed below.
> CALLPILOT	In the event of a failed restore, the "Start Restore" button will be enabled in order to allow you to restart the restore.
WIZARD	When the operation successfully completed, click Next to continue.
	Start Restore Progress:
NORTEL	
	Operation Name: IPESystemBackup CPSERVE 070110 1456 070110 1754
	Operation Status: Successfully completed
	Percent Done: 100% Number of Errors: 0
Restore Result: Res	tore successfully completed. Please click Next to continue.
	View Summary Restore Log View Detailed Restore Log
	Cancel < Back Next > Einish

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- Setup Wizard
   Prepare for
   Database Upgrade
   screen:
  - Click Next to start the database upgrade.







- Setup Wizard
   Unsupported IMAP
   Authentication –
   Warning screen:
  - Click **Next** to continue.

		Now for CallPilot 5.0
CallPilot Setup Wizard -	· IMAP Challenge Response Auth Met	
	WARNING: UNSUPPO OPTION	RTED IMAP AUTHENTICATION
	The CallPilot server had the Challeng sessions. This authentication method	e/Response authentication method selected for IMAP lis no longer supported in CallPilot 5.0.
> CALLPILOT SETUP WIZARD	The IMAP authentication option Plain the upgrade process (via Setup Wiza the network unless SSL has been sek SSL be enabled and required for IMA	Text Authentication will be automatically enabled during rd). This means passwords will be sent unencrypted over ected. To ensure security, we strongly recommend that AP.
	Cancel < <u>B</u> ack <u>N</u> ext >	Einish





- Setup Wizard
   Unsupported SMTP
   Authentication –
   Warning screen:
  - Click **Next** to continue.

		New for CallPilot 5.0
CallPilot Setup Wizard -	SMTP Challenge Response Auth Met WARNING: UNSUPPO OPTION	RTED SMTP AUTHENTICATION
> CALLPILOT SETUP WIZARD ₩@RTEL	The CallPilot server currently has the SMTP sessions. This authentication m If you leave the setting as it is, after delivered using SMTP until a new SMT that you select another authenticatio interruption. The SMTP authentication options can Delivery Configuration->Security Mo	e Challenge/Response authentication method selected for hethod is no longer supported in CallPilot 5.0. If the upgrade is complete messages may not be able to be TP authentication method is selected. It is recommended on method prior to upgrading to avoid a potential service to be found in CallPilot Manager under Messaging->Message des for SMTP sessions.
	Cancel < <u>B</u> ack <u>N</u> ext >	- Einish



- > Setup Wizard Upgrading Data screen:
  - When the conversion completes successfully, click Next to continue.

CallPilot Setup Wizard - L	Jpgrading Data
	Upgrading Data
	When you entered this page, the wizard attempted to automatically start upgrading the restored data onto the CallPilot server to the correct format for CallPilot 5.0. Depending on the server this operation can take 10 to 30 minutes to complete. As the operation progresses, the progress bar will update and any error messages and/or information messages will be displayed below.
> CALLPILOT SETUP	If an error occurs you need to investigate the problem by looking into the restore log file, correct the data, and retry the operation by clicking the "Upgrade Database" button.
WIZARD	When the conversion completes successfully, click Next to continue.
NØRTEL	Upgrade Database
Upgrade Result: Creating	Temporary copy of Database
	Cancel < Back Next > Einish



- > Setup Wizard Upgrading Data screen with upgrade successfully completed:
  - Click **Next** to continue.

CallPilot Setup Wizard - U	Jpgrading Data	×I
	Upgrading Data	
	When you entered this page, the wizard attempted to automatically start upgrading the restored data onto the CallPilot server to the correct format for CallPilot 5.0. Depending on the server this operation can take 10 to 30 minutes to complete. As the operation progresses, the progress bar will update and any error messages and/or information messages will be displayed below.	
> CALLPILOT SETUP	If an error occurs you need to investigate the problem by looking into the restore log file, correct the data, and retry the operation by clicking the "Upgrade Database" button.	
WIZARD	When the conversion completes successfully, click Next to continue.	
N©RTEL	Upgrade Database Progress:	
Upgrade Result: Databas	Upgrade successfully completed.	
Please cl	ick Next to continue.	
[	Cancel < Back Next > Einish	

- > Setup Wizard Finished screen:
  - Click **Finish** to exit the wizard.

***CallPilot Setup Wizard - F	inished!
	Finished!
	Congratulations, you have successfully completed the setup of your CallPilot server.
> CALLPILOT SETUP WIZARD	After the server has re-booted, your final task is to configure your CallPilot server by logging in to CallPilot Manager and running the Configuration Wizard. The Configuration Wizard will prompt you for your CallPilot 5.0 keycode and serial number and then allow you to configure the server based on the contents of the keycode. After a successful logon to CallPilot Manager, click on the Configuration Wizard link, or select Tools -> Configuration Wizard.
NØRTEL	Click Finish to exit the wizard and the CallPilot server will automatically re-boot.
	Cancel < Back Next >



CallPilot Release 5.0 Supported Upgrade/Migration Paths Running the CallPilot Release 5.0 Setup Wizard



> Setup Wizard reboot required message:

• Click **OK** to reboot the server.

SetupWiz	ard 🔀
⚠	A reboot is required before you can continue. Click OK to reboot the server. If the server fails to automatically reboot within 1 minute, please reboot the server manually.
	OK

## Question 7

Why should you use the backup created from the CallPilot 5.0 Upgrade Wizard when restoring data with the Setup Wizard?

- a) It provides the most current view of the system.
- b) The CallPilot 5.0 Upgrade Wizard corrects the data prior to the backup.
- c) Using an earlier backup tape can result in issues encountered during the restore and upgrade process.
- d) The backup from the CallPilot 5.0 Upgrade Wizard includes the CallPilot 5.0 Upgrade Wizard logs.

Course 6407F – What's New With CallPilot 5.0 – Installation and Configuration Issue

## Question 7

Why should you use the backup created from the CallPilot 5.0 Upgrade Wizard when restoring data with the Setup Wizard?

- a) It provides the most current view of the system.
- b) The CallPilot 5.0 Upgrade Wizard corrects the data prior to the backup.
- c) Using an earlier backup tape can result in issues encountered during the restore and upgrade process.
- d) The backup from the CallPilot 5.0 Upgrade Wizard includes the CallPilot 5.0 Upgrade Wizard logs.

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### Question 8

When running the Setup Wizard on a CallPilot 703t server with the hard disk drive size, partitioning, and disk volume allocation configured as:

- C: DISK 0, PARTITION 0
- D: DISK 0, PARTITION 1
- E: DISK 0, PARTITION 2
- F: DISK 0, PARTITION 3

Will the Drive Letter Assignment Error Blocking Error screen be invoked?

- a) Yes
- b) No



### Question 8

When running the Setup Wizard on a CallPilot 703t server with the hard disk drive size, partitioning, and disk volume allocation configured as:

- C: DISK 0, PARTITION 0 D: DISK 0, PARTITION 1
- E: DISK 0, PARTITION 2
- F: DISK 0, PARTITION 3

Will the Drive Letter Assignment Error Blocking Error screen be invoked?

a) Yes

b) No

### Question 9

When restoring data from a backup that was made to a network share (remote disk), what is the correct format for the device directory path of the remote drive location that you enter on the Add Backup Device screen?

- a) \\<IP address>\< remote computer name >
- b) \\<domain name>\< remote computer name >
- c) \\<remote computer name>\<directory path>
- d) \\<domain name>\<directory path>

### Question 9

When restoring data from a backup that was made to a network share (remote disk), what is the correct format for the device directory path of the remote drive location that you enter on the Add Backup Device screen?

- a) \\<IP address>\< remote computer name >
- b) \\<domain name>\< remote computer name >
- c) \\<remote computer name>\<directory path>
- d) \\<domain name>\<directory path>



# Implementing the CallPilot Release 5.0 High Availability Feature

> Lesson 3



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## **Lesson 3 Objectives**



> After this lesson, you will be able to describe the procedure used to implement the new High Availability feature introduced with CallPilot Release 5.0.



# CallPilot Release 5.0 High Availability Feature Overview

### High Availability Feature Overview

- > Keycode enabled feature available only on the 1005r.
  - When a keycode with the high availability feature is installed on a server, the feature can be enabled or disabled, which lets a server have the feature but run as a regular server until the second server is ready.
  - Each high availability pair of servers shares the same serial number and keycode.
  - New dedicated LAN connections (HB1, HB2 and MIRROR) are used. Connections are made with crossover LAN cables.
  - Only one dongle is provided with a pair of servers, it is normally installed on the active server.
  - In the event of a failure, the dongle must be moved from the failed server to the new active server before administration (add / change / delete) operations can be performed.
  - The standby server can come into full service before the dongle is moved.

High Availability Switch Requirements

> Each server has a dedicated DS30 connection to its own set of MGate cards in the PBX.



High Availability Software Overview

- > Third party software, EMC AutoStart agent and console, is used to manage the state of the servers and to mirror data between the servers.
  - AutoStart agent software is installed on the CallPilot servers.
  - AutoStart console is installed on an administration PC with network access to the servers.
  - Provides managed IP services that lets a pair of servers look like one server on the network.
  - Makes use of additional dedicated LAN connections to provide heart beat and mirroring connections between the servers.

High Availability and CallPilot Services

- > If the high availability feature is installed and enabled on a server, the services managed by AutoStart are left in manual state – not automatic.
- > CallPilot System Ready Indicator still functions as the service state and is still monitored by the CallPilot System Manager.

Service	Non High Availability	Active Server	Standby Server
Adaptive Server Anywhere - DB_SQLANY	Automatic	Manual	Manual
CallPilot AOS Service	Automatic	Manual	Disabled
CallPilot HAL Monitor	Automatic	Manual	Manual
CallPilot LDAP Service	Automatic	Manual	Manual
CallPilot Multimedia Volume 1	Automatic	Manual	Manual
CallPilot Multimedia Volume 102	Automatic	Manual	Manual
CallPilot Multimedia Volume 103	Automatic	Manual	Manual
CallPilot Multimedia Cache	Automatic	Manual	Manual
CallPilot Resource Package 1	Automatic	Manual	Manual

High Availability and CallPilot Services (Continued)

Service	Non High Availability	Active Server	Standby Server
	Automatic	Manual	Manual
CallPilot Resource Package 3	Automatic	Manual	Manual
CallPilot Blue Call Router	Automatic	Manual	Manual
CallPilot Call Channel Router	Automatic	Manual	Manual
CallPilot SLEE Service	Automatic	Manual	Manual
CallPilot Notification Service	Automatic	Manual	Manual
CallPilot MTA Service	Automatic	Manual	Manual
CallPilot ACCESS Protocol Emulator	Automatic	Manual	Manual
CallPilot Service Daemon	Automatic	Manual	Manual
CallPilot Service Manager	Automatic	Manual	Manual
CallPilot MWI Service	Automatic	Manual	Manual
CallPilot Maintenance Service Provider	Automatic	Manual	Manual
CallPilot IMAP Service	Automatic	Manual	Manual
CallPilot IMA Service	Automatic	Manual	Manual
CallPilot Time Service	Automatic	Manual	Manual
Telephony	Automatic	Manual	Manual
Remote Access Connection Manager	Automatic	Manual	Manual
Remote Access Auto Connection Manager	Disabled	Disabled	Disabled

High Availability Disk Mirroring Requirements

- > Location of data on servers changed to support data mirroring between the two CallPilot servers:
  - Database, MMFS, appbuilder applications, etc.
  - New layout moves the customer data to the E:\ and F:\ drives
  - Mirrored drives on the standby server can not be accessed while the active server is running

Previous Drive Configuration			Release 5.0 Drive Configurat5ion			
Drive:	Files:	Drive:	Files:			
C:\	OS + CP Manager	C:\	OS + CP Manager			
D:\	CallPilot S/W + DB + VS1 + Prompts	D:\	CallPilot S/W			
E:\	VS102 + Appbuilder	E:\	DB			
F:\	VS103 + Appbuilder	F:\	VS1 + VS102 + VS103 + Appbuilder + Prompts			

High Availability Server Configuration Requirements

- > Windows administrator account names and passwords must be the same on both servers.
- > The VPIM prefix and LDAP search base must be the same on both servers.
- > The FQDN on both servers must be set to the Managed Host name.
- > The computer names of the servers must contain only alphanumeric characters.
- > The same remote backup device must be defined on both servers (through CallPilot Manager).
  - *Note:* Changes to any of the IP configuration (IP address or host name) is difficult once the AutoStart software is installed.

## Implementing the High Availability Feature Managed (Virtual) IP

- > Client applications are not aware that there are two CallPilot servers:
  - Client applications connect to the managed IP address / host name.
  - Each CallPilot server still has its own ELAN and CLAN IP addresses and host names, but they are not used by the clients.
  - The EMC AutoStart software routes requests made to the managed IP / hostname to the currently active server in the pair.

CallPilot HA	CallPilot S	erver #1	CallPilot Server #2			
Parameter	Value	Parameter	Value	Parameter	Value	
Managed Host Name	СРНА	Host Name	CP1	Host Name	CP2	
Managed ELAN IP	47.0.10.3	ELAN IP	47.0.10.1	ELAN IP	47.0.10.2	
Managed CLAN IP	47.0.220.3	CLAN IP	47.0.220.1	CLAN IP	47.0.220.2	





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CallPilot Server #1							
Parameter	Value						
Host Name	CP1						
ELAN IP	47.0.10.1						
CLAN IP	47.0.220.1						
HB 1 IP	193.0.0.10						
HB 2 IP	192.0.0.10						
Mirror IP	194.0.0.10						

#### **CallPilot Server #2**

Parameter	Value
Host Name	CP2
ELAN IP	47.0.10.2
CLAN IP	47.0.220.2
HB 1 IP	193.0.0.11
HB 2 IP	192.0.0.11
Mirror IP	194.0.0.11



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## The EMC AutoStart Console

The EMC AutoStart Console

- > The AutoStart Console:
  - Management tool
  - Used to configure and monitor the AutoStart software.
  - Installed on both CallPilot servers.
  - Can also be installed on a stand alone PC for remote management.

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The EMC AutoStart Console (Continued)

- > On the AutoStart Console:
  - Each CallPilot High Availability server pair on a network must have a unique AutoStart domain name.
  - The AutoStart domain name is set when the AutoStart software is installed.

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	Info	10:33:21 AM J	lun I	Installe	ed PrintServ	vices11.jar	
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The EMC AutoStart Console (Continued)

- > On the AutoStart Console:
  - Resource Groups:
    - CallPilot Group of services that can only run on one server at a time.
    - CallPilot\_cplab26 0a – Group of services running on node cplab260a.
    - CallPilot\_cplab26

       1a Group of
       services running
       on node
       cplab261a.



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The EMC AutoStart Console (Continued)

- > On the AutoStart Console:
  - Nodes:
    - cplab260a
    - Cplab261a
  - Services:
    - List of all the services and what node they are currently running on


The EMC AutoStart Console (Continued)

- > On the AutoStart Console:
  - Data Sources:
    - drvE Mirror for drive E:
    - drvF Mirror for drive F:
  - IP Addresses:
    - Managed (virtual) ELAN
    - Managed (virtual) CLAN



The EMC AutoStart Console (Continued)

- > On the AutoStart Console
  - NICS:
    - IP address and status of each NIC on both nodes.
  - Utility Processes:
    - Custom utilities used by AutoStart during failover.
  - Rules:
    - Custom rules used by AutoStart.



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**Checking High Availability Status** 

- On the AutoStart Console:
  - Expand the domain >Resource Groups.
  - 2. Select CallPilot.
  - 3. Click the Status tab.

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File Action View Help					
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oplab261a		-			-1
Processes	Name	iype	State	Node	
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Node Aliases	47.0.30.0	IP	Assigned	cplab201a cplab261a	
Data Sources	CP-HAL-Monitor	" Service	Running	cplab261a	
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drvF	LoadDN	Utility Process		***	
	Selephony	Service	Running	cplab261a	
47.0.30.6	CP-AOS-Svc	Service	Running	cplab261a	
₩ ₩ 47.11.220.206	CP-LDAP-Svc	Service	Running	cplab261a	
	🔰 🎱 CP-Svc-Daemon	Service	Running	cplab261a	
Hell Hilty Processes	CP-Svc-Manager	Service	Running	cplab261a	
H-Bules	CP-Multimedia-Volu.	Service	Running	cplab261a	
State Monitors	CP-Multimedia-Volu.	Service	Running	cplab261a	
	CP-Multimedia-Volu.	Service	Running	cplab261a	
		🖌 Apply 🛛	🖉 Cancel 🛛 👔 Help		

Checking High Availability Status (Continued)

- > On Status tab under Status of Resource Group
  - Monitoring State:
    - Enabled: automatic failover enabled
    - **Disabled**: automatic failover disabled
    - Unknown: AutoStart is unable to determine the status.

ain	Settings	ptions Advanced	Availability Tracking	Status			
ains	Status of R	esource Group					
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Hondules	Monitoring S	State:	Enabled		) cplab260a		
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Cplab260a	Status of R	esource Group Eler	nents	,			
Cplab261a	N	lame	Туре	St	ate	Node	
	🔍 🔍 drvE	Data	Source	Attached	cpla	ab261a	
	🔍 🔍 drvF	Data	Source	Attached	cpla	ab261a	
Process Proxies	SA SA	Serv	rice	Running	cpla	ab261a	
Node Proxies	47.0.30	.6 IP		Assigned	cpla	ab261a	
	47.11.2	20.206 IP		Assigned	cple	ab261a	
Data Sources	CP-HAL	-Monitor Serv	rice	Running	cpla	ab261a	
druE	EnableAOS	; Utilit	/ Process		***		
	LoadDN	Utilit	/ Process		***		
	Telepho	ony Serv	rice	Running	cpla	ab261a	
47 11 220 206	CP-AO:	S-Svc Serv	rice	Running	cpla	ab261a	
T	CP-LDA	P-Svc Serv	rice	Running	cple	ab 261 a	
ENIC Groups	CP-Svo	-Daemon Serv	rice	Running	cpla	ab261a	
⊞-utility Processes	CP-Svo	-Manager Serv	rice	Running	cpla	ab261a	
T-Rules	CP-Mult	imedia-Volu Serv	rice	Running	cpla	ab261a	
State Monitors	CP-Mult	imedia-Volu Serv	rice	Running	cpla	ab261a	
±Triggers	CP-Mult	imedia-Volu Serv	rice	Running	cpla	ab261a	

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Checking High Availability Status (Continued)

- > On Status tab under Status of Resource Group
  - Group State:
    - Online: all resources are up and working.
    - Offline: all resources are down.
    - Online pending: some resources are up but some services are either starting or stopping.

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main	Settings Option	ns Advanced	Availability Tracking	g Status			
nains aam 51 ⊡-Modules	-Status of Reso	urce Group	Trackland		Preferred	Nodes	
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E • • CallPilot_cplab261a ⊡ • • CallPilot_cplab261a ⊡ • • Nodes	Group State:		Online				
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Processes	Name		Туре		State	Node	
🕀 🍚 Services	drvE	Data	Source	Attached		cplab261a	
Process Proxies	drvF	Data	Source	Attached		cplab261a	
🗄 🕒 Node Proxies		Servi	e	Running		cpiap261a	
Node Aliases	47.0.30.6	1P		Assigned		cplab261a	
📮 🌑 Data Sources	47.11.220.2	206 IP Initor Sorui		Assigned		oplab261a	
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⊞	CP-Svc-Da	emon Servi	~~ ~	Running		cplab261a	
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Triange	CP-Multimed	dia-Volu Servi	e	Running		cplab261a	
ter≕ inggers							

Checking High Availability Status (Continued)

- > On Status tab under Status of Resource Group:
  - Preferred Nodes:
    - Green light: server is in working state.
    - Red light: server is in sleeping state.
    - Yellow light: server is in either starting or stopping status.

referred Nodes ab260a ab261a 	Preferred Nodes	<ul> <li>Enabled</li> <li>Online</li> </ul>	tus of Resource Group itoring State:	s 151 Modules • Resource Groups
referred Nodes ab260a ab261a 	Preferred Nodes	<ul> <li>Enabled</li> <li>Online</li> </ul>	itoring State:	n51 Modules -
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Node		1		Vodes
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11001	State	Туре	Name	
cplab261 a	ched cplab2	ata Source	drvE D	Processes
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cplab261a	ining cplab2	ervice	Telephony S	47.0.30.6
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Checking High Availability Status (Continued)

- > Check status of the HB1 / HB2 / Mirroring links:
  - Click to select the Domain -> NICs.
  - Status of HB1 / HB2 / Mirroring / ELAN / CLAN shown in right-hand window.

🕵 Legato Availability Console - Version 5.1					
File Action View Help					
の意識感					
Domain	Network Interface	Base IP	Current State	Usage	NIC Group
drvF	🔍 cplab260a:HB1	192.0.0.10	Alive	Usable	192.0.0.0
📗 🚊 🕘 IP Addresses 📨	🔍 🕥 cplab260a:MIRR	. 193.0.0.10	Alive	Usable	193.0.0.0
47.0.30.6	🕥 cplab260a:HB2	194.0.0.10	Alive	Usable	194.0.0.0
47.11.220.206	🔍 🕥 cplab260a:ELAN	47.0.30.3	Alive	Usable	47.0.30.0
	🕥 cplab260a:CLAN	47.11.220.138	Alive	Usable	47.11.220.0
	🔍 🔍 cplab261a:HB1	192.0.0.11	Alive	Usable	192.0.0.0
🗄 Utility Processes	🔍 🔍 cplab261a:MIRR	. 193.0.0.11	Alive	Usable	193.0.0.0
Erence	🕥 cplab261a:HB2	194.0.0.11	Alive	Usable	194.0.0.0
State Monitors	🔍 🕥 cplab261a:ELAN	47.0.30.5	Alive	Usable	47.0.30.0
Triggers 💌	🔍 🔍 cplab261a:CLAN	47.11.220.174	Alive	Usable	47.11.220.0

### **Automatic Failover**

- > Expand Domain ->Resource Groups, select CallPilot, and open the Status tab
  - To enable automatic failovers:
    - 1. Right-click Resource Groups->CallPilot.
    - 2. Click Monitor Resource Group.
  - To disable automatic failovers:
    - 1. Right-click **Resource Groups->CallPilot**.
    - 2. Click Stop Monitoring.

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E CallPilot_cplab260a CallPilot_cplab261a	Group State:	Online	<b>_</b>
Colab260a		🗸 Apply 🖉 Cance	el 📝 Help

#### Manual Failover

- > Expand Domain ->Resource Groups, select CallPilot, and open the Status tab:
  - To implement a manual failover:
    - 1. Right-click Resource Groups->CallPilot.
    - 2. Click Relocate Resource Group.
    - 3. Select the standby node.

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nains		St	atus of Resource Gro	pup			
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	+ Create New Resource Group	Ctrl+Insert	up State:	<ul> <li>Online</li> </ul>			
E 🕘 Nodes	🗙 Delete Current Resource Group	Ctrl+Delete					
ep 📀	Monitor Resource Group	Ctrl+M	tus of Resource Gro	oup Elements			
O cp	📓 Stop Monitoring	Ctrl+Shift+M	Name	Туре	State	Node	
Processes	Bring Online		drvE	Data Source	Attached	cplab261a	
Process P	🧿 Take Offline	Ctrl+Shift+O	drvF asa	Data Source	Attached Running	cplab261a cplab261a	
HIMODE Alies	其, Relocate Resource Group	•	🍥 cplab260a		-		_
Dete S	Abort Resource Group Operation	Ctrl+A	🔵 cplab261a	🗸 Apply	🖉 Cancel 🛛 🤨 Help		

#### Manual Failover Details

- >When an administrator initiates a manual failover, the EMC AutoStart software performs the following tasks:
  - On the active CallPilot server (cp1) :
    - Stops the services in the CallPilot resource group.
    - Detaches the Managed ELAN and CLAN IP addresses.
    - Stops the database service.
    - Detaches the mirrored drives (data source drvE and drvF).
  - On the standby CallPilot server (cp2):
    - Attaches the mirrored drives (data source drvE and drvF).
    - Starts the database service.
    - Attaches the Managed ELAN and CLAN IP addresses.
    - Loads the server specific configuration (i.e. TN) into the database.
    - Start the services in the CallPilot resource group



# Installing CallPilot Release 5.0 with the High Availability Feature

Installing CallPilot with High Availability

- > Factory installed:
  - CallPilot 5.0 image
  - Two additional dual port NIC cards
  - Drives are partitioned as part of image installation
- > The EMC AutoStart software is not factory installed.
  - Must be installed by the customer.
  - Located on the CallPilot Applications CD.

Installing CallPilot with High Availability (Continued)

- > CallPilot High Availability installation steps:
  - Install MGate cards and configure the switch.
  - Install CP1 and CP2 into a rack; dongle on CP1.
  - Power on both CP1 and CP2 and run though the mini-setup.
  - Run the setup wizard on both servers, install any PEPs if required.
  - On CP1, run the config wizard.
  - On CP2, run the config wizard.
  - Connect the HB1, HB2 and MIRROR crossover LAN cables between CP1 and CP2.
  - Verify LAN connections.

Installing CallPilot with High Availability (Continued)

- > Continue the CallPilot High Availability installation:
  - Connect and verify ELAN and CLAN connections on both servers.
  - On CP1, run the High Availability Configuration Wizard (stage 1):
    - Verify the configuration of the two servers in the High Availability pair.
  - Install the AutoStart agent and console on CP1 and reboot CP1.
  - On CP1, launch the AutoStart Console and enter the administrator account and password into the Licensing/Security tab.
  - Install the AutoStart agent and console on CP2 and reboot CP2.
  - On CP1, run the High Availability Configuration Wizard (stage 2):
    - Verify the AutoStart software installation.
    - Generate the definition file that is used to provide configuration information to the AutoStart Console.

Installing CallPilot with High Availability (Continued)

- > Complete the CallPilot High Availability installation:
  - On CP1, launch AutoStart Console and configure AutoStart:
    - Import AutoStart definition file.
    - Configure utility processes with the administrator account and password.
    - Attach the mirrored drives (drvE and drvF) to CP1. This will take about 45 minutes as the data from CP1 is mirrored onto CP2.
    - Add the managed ELAN IP and managed host name into the E:\Nortel\HA\Autostart\_Configuration.ini file.
  - Bring CP1 into service (in the AutoStart console):
    - Bring resource group CallPilot into service.
    - Bring resource group CallPilot\_CP1 into service.
    - Bring resource group CallPilot\_CP2 into service.

Installing CallPilot with High Availability (Continued)

- > Verify the CallPilot High Availability installation:
  - Ensure that CP1 comes into service and answers calls.
  - Test CP1 to make sure all channels / DSPs are functioning.
  - Use the AutoStart Console to initiate a manual failover to CP2.
  - Verify that CP2 comes into service and answers calls.
  - Move the dongle from CP1 to CP2.
  - Test CP2 to make sure all channels / DSPs are functioning.
  - Shutdown and restart CP1 to ensure that it is ready to take over in the event of a failover.
  - Use the AutoStart Console to enable monitoring to enable automatic failovers.

*Note:* At this point, server CP2 is now the Active Server and CP1 is the Standby Server.

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Upgrading the CallPilot High Availability Pair

- > Perform the following steps to upgrade a CallPilot High Availability pair:
  - Run the Upgrade Wizard on the Active Server to generate a fresh backup.
  - Install the new CallPilot image on the Active Server.
  - Run the Setup Wizard and restore the data on the Active Server.
  - Install the new CallPilot image on the Standby Server.
  - Run the Setup Wizard and restore the data on the Standby Server.
  - Follow the remainder of the installation procedures to re-install and re-configure the AutoStart software.

## Implementing the High Availability Feature Day to Day Management

- > The Configuration Wizard and High Availability:
  - AutoStart stores information from both servers including host names and IP address.
  - Information is used to support data mirroring and to administer the High Availability pair.
  - When using the Configuration Wizard to change a server's configuration, additional steps are required to ensure that the High Availability pair continues to function.



## Day to Day Management of the CallPilot Release 5.0 High Availability Feature

Day to Day Management

- > General procedure for use of the Configuration Wizard with a CallPilot High Availability pair:
  - Use the AutoStart Console to stop monitoring / disable automatic failovers.
  - Run the CallPilot Configuration Wizard to change the CallPilot server settings as required.
  - Reboot the server and wait for the server to come into service.
  - Use the AutoStart Console to start monitoring / enable automatic failovers.
  - Exceptions to this general procedure include:
    - Changing the server Host Name
    - Changing IP addresses for the ELAN, CLAN, HB1, HB2, and Mirror network connections
    - Changing Account passwords
  - Refer to the CallPilot 5.0 High Availability: Installation and Configuration guide for detailed instructions.

**PEP Management Overview** 

- > Both CallPilot servers must have identical PEPs and Service Updates installed.
- > Mirrored drives on the standby server can not be accessed while monitoring is enabled.
- > Any PEP or SU that impacts the database or MMFS can only be installed on an Active CallPilot server.

## Implementing the High Availability Feature PEP Management Overview

**Note:** In the PEP / SU installation procedure on the next several slides, there are two servers, the Active Server that is identified as CP1 and the Standby Server that is identified as CP2. The two servers change roles during the PEP installation process. This process assumes that the AutoStart Console is only being run on the two CallPilot servers. It could also be run on a standalone administration PC. This process causes the Active Server to go out of service for the time that it takes to perform a failover.

During the failover process, all CallPilot services are not available.

Installing Non-database PEPs

- > Perform the following tasks on CP1 (Active Server):
  - Launch the AutoStart Console.
  - Stop monitoring to disable automatic failovers.
- > Perform the following tasks on CP2 (Standby Server):
  - Install the PEPs.
  - Reboot the server as required.
  - Log in to Windows.
  - Launch the AutoStart Console.
  - Enable monitoring to enable automatic failovers.
  - Initiate a manual failover.
  - Wait for the failover to complete and CP2 to come into service.

#### > CP2 is now the new Active Server and CP1 becomes the new Standby Server.

Installing Non-database PEPs (Continued)

- > Perform the following tasks on CP1 (now the Standby Server):
  - Install the PEPs
  - Reboot the server as required
- > At this point, both servers are updated to the latest PEP. CP2 is now running as the Active Server and CP1 is the Standby Server.

## Implementing the High Availability Feature Installing Database PEPs

- > Perform the following tasks on CP1 (Active Server):
  - Launch the AutoStart Console.
  - Stop monitoring to disable automatic failovers.
  - Take the resource group offline shutting down CallPilot.
  - Attach the mirror drives (drive E and drive F) to CP1 so that the disks can be accessed from CP1.
  - Install the PEPs.
  - Reboot the server as required.
- > CP1 now has the new software, registry settings, and database updates. Because the resource group is offline and monitoring is disabled, CallPilot does not automatically restart after the reboot.

Installing Database PEPs (Continued)

- > Perform the following tasks on CP2 (Standby Server):
  - Launch the AutoStart Console.
  - Attach the mirror drives, drive E and drive F to CP2 so the disks can be accessed from CP2
  - Install the PEPs
  - Reboot the server as required
- > CP2 now has the new software, registry settings, and database updates. Because the resource group is offline and monitoring is disabled, CallPilot does not automatically restart after the reboot.

Installing Database PEPs (Continued)

- > Perform the following tasks on CP1 (Active Server):
  - Launch the AutoStart Console.
  - Start monitoring to enable automatic failovers.
  - Bring the resource group online starting up CallPilot.
- >Both servers are now updated with the PEPs and the High Availability pair are back online.

**Installing Microsoft Hot Fixes** 

- > Microsoft Hot Fixes generally affect only the base operating system.
- > Hot Fixes may or may not require a reboot.
  - If the hot fix does not require a reboot, then the hot fix can be installed in parallel on the active and the standby CallPilot servers.
  - If the hot fix does require a reboot, then the installation process requires a failover which temporarily takes the CallPilot server out of service. The installation process is the same as for non-database PEPs.

Backup and Restore on the High Availability Pair

- > Backups must be run on the Active Server:
  - The Standby Server can not access the mirrored drives.
- > Backup scheduling functions are the same as on a normal CallPilot server with the following limitations:
  - If backing up to a mapped network drive, the drive location must be configured on both servers.
  - If backing up to a external SCSI Tape Drive, the drive must be physically connected to which ever server is currently the Active Server.

**Remote Notification - Email** 

- > The EMC AutoStart software supports both email notification of events and SNMP:
  - Email notification is configured by entering the SMTP server information in the AutoStart Console under the domain Settings tab.

+ × ⊳ 🖲 🎦 🖆 🛄	
Domain	Settings Licensing/Security Statistics Event Log Isolation Settings
Domains	Settings
⊟⊶ <mark>aam51</mark> ⊡-modules	Domain Name: aam51 User Mode: User
🗄 🔍 Resource Groups	Description:
⊕ • • ● Nodes • • • Processes	Node List: cplab260a, cplab261a
🗄 🕘 Services	Domain Port: 8042 🔽 Connect At Console Startup
Process Proxies	
Et. Vice Alegen	Notification
The Aliases	SMTP Server: SMTPTOR.nortelnetworks.com
tes Unices ter • ● IP Addresses	SNMP Gateway:
⊞ — • ● NICs . ● – NIC Groups	SNMP Community:
	Attributes
H-Rules	
±mstate Monitors ± ⊞…Triggers	Apply O Cancel 📝 Help

Remote Notification – Email (Continued)

> Enter email address for the Resource Groups on the Options tab in User Notification settings.

👧 Legato Availability Console - Version S	.1		
File <u>A</u> ction <u>V</u> iew Help			
+ × ■ ≥ ► ● ∰ ⊘			
Domain	Settings Options Advanced Availability 1	Tracking Status	1
Domains ⊡aam51 	Options Current Auto Node Group Failover User Notification Settings Notify on State Changes	Auto Failback to First Node in Preferred Node List	
E  CallPilot_cplab261a Nodes	Send Email to (space separated): gaubew(	@nortel.com	
Processes     Services     Process Proxies     Node Proxies     Node Aliases     O Data Sources     O IP Addresses     I	Controls Delay After Domain Startup 45: Process Will Be Restarted Up To 3 To When Shutdown Attempts Exceed 2 S st	rom: Domain aam51 [AAM] eent: Friday, June 16, 2006 10:10 AM o: Gaube, Wilfred [BVW:9M13:EXCH] subject: Resource Group CallPilot is in tate.	the Online Pending
	M	lessage sent: 06/16/06 10:08:25	

### Question 1

When installing a CallPilot High Availability pair, how are the HB1, HB2 and MIRROR dedicated LAN connections completed?

- a) They are connected to the ELAN subnet.
- b) They are connected to the Nortel Server Subnet.
- c) The connections are made with crossover LAN cables.
- d) HB1, HB2 and MIRROR are not used with the High Availability feature.

#### Question 1

When installing a CallPilot High Availability pair, how are the HB1, HB2 and MIRROR dedicated LAN connections completed?

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- d) HB1, HB2 and MIRROR are not used with the High Availability feature.



#### Question 2

True or False When configuring the CallPilot High Availability pair, the FQDN on both servers must be set to match the Managed Host Name.

a) Trueb) False



#### Question 2

True or False When configuring the CallPilot High Availability pair, the FQDN on both servers must be set to match the Managed Host Name.

# a) Trueb) False

### Question 3

When installing the CallPilot High Availability pair, where is the EMC AutoStart Console software located?

- a) EMC AutoStart Console software is downloaded from Nortel website
- b) EMC AutoStart Console software is provided separately on its own CD
- c) EMC AutoStart Console software is installed on the 1005r Factory Image
- d) EMC AutoStart Console software is located on the CallPilot Applications CD
### Question 3

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# CallPilot Release 5.0 Security Enhancements

> Lesson 4



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### **Lesson 4 Objectives**



> After this lesson, you will be able to describe the security enhancements introduced with CallPilot Release 5.0.



Release 5.0 Security Enhancements Overview

- > CallPilot Release 5.0 Security Enhancements:
  - Upgrade and Set-up Wizard Warning messages due to Challenge/Response authentication removal
  - Configuration Wizard Removal of unnecessary Windows accounts
  - CallPilot Manager Authentication options reduced and master key reset moved
  - Reporter New Administrator Action Report entries
  - Event Log New information messages
  - My CallPilot Last login and invalid login attempts
  - CallPilot Desktop Last login and invalid login attempts
  - App Builder SSL Default and removal of Userid/Password storage
  - Database Enhanced password encryption
  - Operating System Additional hardening



Upgrade and Setup Wizards – Challenge/Response

### > New warning messages for Challenge/Response

Upgrade Wizard - IMAP Ch	allenge Response Auth Method Warning	
Ø	WARNING: UNSUPPORTED IMAP AUTHENTICATION OPTION	
	The CallPilot server currently has the Challenge/Response authentication method selected for IMAP sessions. This authentication method is no longer supported in CallPilot 5.0.	
CALLPILOT UPGRADE WIZARD	The IMAP authentication option Plain Text Authentication will be automatically enabled during th upgrade process (via Setup Wizard). This means passwords will be sent unencrypted over the network unless SSL has been selected. To ensure security, we strongly recommend that SSL be enabled and required for IMAP.	he
Vpgrade Wizard - S	MTP Challenge Response Auth Method Warning	
	WARNING: UNSUPPORTED SMTP AUTHENTICATIC OPTION	N
	The CallPilot server currently has the Challenge/Response authentication method selection SMTP sessions. This authentication method is no longer supported in CallPilot 5.0.	cted for
> CALLPILOT UPGRADE WIZARD	If you leave the setting as it is, after the upgrade is complete messages may not be al delivered using SMTP until a new SMTP authentication method is selected. It is recomm you select another authentication method prior to upgrading to avoid a potential servi interruption.	ble to be hended that ice
	The SMTP authentication options can be found in CallPilot Manager under Messaging-> Delivery Configuration->Security Modes for SMTP sessions.	>Message
NORTE		
-		

CallPilot Setup Wizard - IN	MAP Challenge Response Auth Method Warning	
Ø	WARNING: UNSUPPORTED IMAP AUTHENTICATION OPTION	
	The CallPilot server had the Challenge/Response authentication method selected for IMAP sessions. This authentication method is no longer supported in CallPilot 5.0.	
> CALLPILOT SETUP WIZARD	The IMAP authentication option Plain Text Authentication will be automatically enabled during the upgrade process (via Setup Wizard). This means passwords will be sent unencrypted over the network unless 5% has been selected. To ensure security, we strongly recommend that 5% be enabled and required for IMAP.	
CallPilot Setup Wiz	ard - SMTP Challenge Response Auth Method Warning	>
K	WARNING: UNSUPPORTED SMTP AUTHENTICATION OPTION	1
	The CallPilot server currently has the Challenge/Response authentication method selecte SMTP sessions. This authentication method is no longer supported in CallPilot 5.0.	ed for
> CALLPILOT SETUP WIZARD	If you leave the setting as it is, after the upgrade is complete messages may not be able delivered using SMTP until a new SMTP authentication method is selected. It is recommer that you select another authentication method prior to upgrading to avoid a potential se interruption.	to be ided rvice
	The SMTP authentication options can be found in CallPilot Manager under Messaging->M Delivery Configuration->Security Modes for SMTP sessions.	essage
NØRTE		
_		
	Cancel < Back Next > Einish	
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Configuration Wizard – Removal of Accounts

### > Removal of NGenSys, NGenDist and NGenDesign

N@RTEL CALLP	LOT MANAGER	
LDAP server: 172.16.52.36   Mailbox Number: 000000	N@RTEL CALLPILOT MANAGER	E.
Home User <b>v</b> System <b>v</b> Maintenance	LDAP server: 172.16.52.36   Mailbox Number: 000000	Preferences   Help   Logout
Location + Configuration Wizard + Password Information	Home User 🔻 System 👻 Maintenance 👻 Messaging 👻 Tools 👻 Help 👻	
Configuration Wizard: Password Information	Location + Configuration Wizard + Password Information	
Back Next Cancel Help	Configuration Wizard: Password Information	
	Back Next Cancel Help	
Password Information:		
Change the current password for administrator a	Password Information:	
If necessary, you can rerun the Configuration Wi:	Change the current password for administrator account, or click Next to continue without changing the password. If necessary, you can rerun the Configuration Wizard at a later time to change the passwords.	
Administrator		
• Leave the password unchanged.	Administrator	
C Change the password	C Leave the password unchanged.	
	Change the password	
	Current password:	
	New password:	
	Confirm the new password:	
Back Next Cancel Help		
	Part Next Careel Hala	
	Back Next Cancel Help	

CallPilot Manager – Internet Mail Clients Page

### > Removal of Challenge/Response authentication

NØR	TEL		CALLPIL	OT MANAGE	R				E
AP server	r: 172.16.52.3	8   Mailbox Numb	ber: 000000				Preferences	<u>Help</u>	Log
lome	User 🔻	System 🔻	Maintenance 👻	Messaging 🔻	Tools 🔻	Help 🔻			
ocation 🕈	• Messaging 🕈	Internet Mail Clie	ents						
nternet	t Mail Clier	nts	1						
Save	Cancel	Print Help	<u> </u>						
.DAP									
Sessio	on Security	Options							
En	cryption Op	itions							
V	Enable LC —	JAP with SSL p	port						
	Require	SSL							
The Lo	dap search l	base hosted by	y this LDAP server:						
IMAP	able IMAP	with Plain Pass	sword Authentication	n	<b>•</b>				
Sessio	on Security	Options							
En	ncryption Op	otions							
Г	Enable IN	1AP with SSL p	port						
	🗖 Requir	re SSL							
-									
Save	Cancel	Print Help	2						
			and Configuration	leave f 0	Marah 45 . 00	07			



CallPilot Manager – Security Modes for SMTP Page

### > Removal of Challenge/Response authentication

LDAP server: 172:16.52:36       Mailbox Number: 000000       Preferences       Help       Logour         Home       User < System < Maintenance < Messaging < Tools < Help             Location + Messaging + Message Delivery Configuration + Security Modes for SMTP Sessions             Security Modes for SMTP Sessions                Encryption Options        Enable SSL for Incoming SMTP Sessions:
Home       User ▼       System ▼       Maintenance ▼       Messaging ▼       Tools ▼       Help ▼         Location → Messaging → Message Delivery Configuration → Security Modes for SMTP Sessions
Location + Messaging + Message Delivery Configuration + Security Modes for SMTP Sessions          Security Modes for SMTP Sessions         Save       Cancel         Help         Encryption Options         Enable SSL for Incoming SMTP Sessions:         Requires SSL for Incoming SMTP Sessions:
Security Modes for SMTP Sessions         Save       Cancel       Help         Encryption Options       Enable SSL for Incoming SMTP Sessions:           Requires SSL for Incoming SMTP Sessions:
Save Cancel Help Encryption Options Enable SSL for Incoming SMTP Sessions: Requires SSL for Incoming SMTP Sessions:
Encryption Options Enable SSL for Incoming SMTP Sessions:
Enable SSL for Incoming SMTP Sessions:
Requires SSI for Incoming SMTP Sessions:
Connect to server with SSL for Outgoing SMTP Sessions:
Authentication Options
Unauthenticated: 🔽
User ID/Password Authentication:
SMTP//PIM Password for Initiating Authenticated
Authentication Failure Attempts
Maximum failed authentication attempts from a remote server. C No Maximum
Imited to 4 (1-99) attempts
Action to perform when the maximum has been reached: Log and Disable Server 🗾
Maximum failed authentication attempts from a user: 9
Action to perform when the maximum has been reached. Log and Disable Liser
Save Cancel Help

CallPilot Manager – Security Administration Page

> Password Master Encryption Key Reset button moved from External Email Servers page to Security Administration

NØR	TEL		CALLPII	от м		GER						F
LDAP serve	r: 172.16.52.30	3   Mailbox Numb	er: 000000							Preferences	<u>Help</u>	<u>Logout</u>
Home	User 🔻	System 🔻	Maintenance	M	essaging	<b>y</b> 🔻	Tools 🔻	Help	•			
Location =	► Messaging →	Security Administ	tration									
Securit	y Administ	ration										
Jave	Cancer									 		
Genera	al											
Thr	u-Dial Restr	iction Permissi	ion List Number:	On Swite	ch	Pro	perties					
Log	jon to Mailb	ox from Telepho	ones External to	-								
	a		Switch:	×								
Pass	words											
			Prefix:	2								
		N	/linimum Length: 🛛	i .								
Ma	ximum Day:	s Permitted Be	tween Changes:	1	1							
	P	assword Expiry	y Warning Days: 🛛									
Mi	nimum Num	ber of Change	Before Repeats:		1							
	Disabled	Administrators	will be Enabled:	<del>.</del>	1 .							
	Pas	ssword Master	Encryption Key:	Reset								

page.

CallPilot Reporter – Administrator Action Report

### > New entries in the Administrator Action Report

### Administrator Action Report (1)

3/26/2006 12:00:00AM - 3/27/2006 11:00:00PM

Administrator Name	Action Type	Client Network Address	Object	Description
admin,admin	Create	47.11.182.250	Users	Mailbox 8008000 was created.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 password has been reset.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 was modified.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 password has been changed.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 was modified.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 administration type has been changed.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 has been disabled.
admin,admin	Modify	47.11.182.250	Users	Mailbox 8008000 has been enabled.
admin,admin	Modify	47.11.182.250	External Mail Server	External Email Server zcarhxm1.ca.nortel.com was modified.
admin,admin	Create	47.11.182.250	External Mail Server	External Email Server zcarhxm1.ca.nortel.com was created.
admin,admin	Delete	47.11.182.250	External Mail Server	External Email Server zcarhxm1.ca.nortel.com was deleted.



Windows Event Log – Application Login/Logout

>New events in the Windows Application Event Log recording CallPilot Manager and AppBuilder logins



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My CallPilot – Last Logon / Failed Logon

### > Last Logon and Failed Logon Attempts displayed on the My CallPilot Home page



My CallPilot – Last Logon / Failed Logon

> Last Logon and Failed Logon attempts displayed on the My CallPilot Useful Information page



CallPilot Desktop Messaging – Last Logon / Failed Logon

> Last Logon and Failed Logon Attempts displayed on the Desktop Messaging Client



# rements

# **CallPilot 5.0 Security Enhancements**

CallPilot Application Builder – Security Enhancements

- > Default log on settings set to SSL for the entire session instead of For login and password changes only
- > User always prompted for the user name and password information for connection via dial-up

Configure the security between the Application Builder client and the CallPilot server. SSL Activation Level Never For the entire session Only for login and password changes SSL Port: 636	
< <u>B</u> ack Finish Cancel Hel;	>

Database Changes – Passwords

- > Password encryption changed to use stronger algorithms
- > User passwords changed at first successful logon
- > Other passwords upgraded to new algorithm on first use (when retrieved from database)



### CallPilot 5.0 Security Enhancements Operating System

- > OS registry settings modified to improve security
- > DCOM ports statically allocated to port 5000 instead of dynamic allocation
- > Internet Explorer settings hardened:
  - According to JITC recommendations
  - Per-user zone settings disabled
- > Database software moved to a separate drive from database data



Troubleshooting – Networking Problems

- > Use CallPilot Manager to verify compatible authentication and encryption (SSL) settings at both local and remote servers.
- > Use CallPilot Manager to check if server was disabled.
- > Examine Windows Event Log for possible failure reasons.
- > Use a DOS window to ping between servers.



Troubleshooting – Desktop Problems

- >Use CallPilot Manager to verify correct authentication and encryption (SSL) settings.
- > Use CallPilot Manager to check if the user was disabled.
- > Examine Windows Event Log for possible failure reasons.
- > Use a DOS window to ping between client and server.

Troubleshooting – Operating System Problems

- > Confirm that problem is not a valid security issue.
- > Examine Windows Event Log for possible failure reasons.
- > Search Microsoft Knowledge Base for possible solutions.



### Question 1

Which user accounts have been removed from the Configuration Wizard Password Information page for Release 5.0?

- a) Administrator
- b) NGenSys
- c) NGenDist
- d) NGenDesign

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Which user accounts have been removed from the Configuration Wizard Password Information page for Release 5.0?

- a) Administrator
- b) NGenSys
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- d) NGenDesign



Question 2

Which of the following entries have been added to the Administrator Action Report?

- a) User mailbox password changed
- b) User mailbox password reset
- c) User mailbox enabled
- d) User mailbox administration type changed



Question 2

Which of the following entries have been added to the Administrator Action Report?

- a) User mailbox password changed
- b) User mailbox password reset
- c) User mailbox enabled
- d) User mailbox administration type changed

### Question 3

Where is the last logon and number of failed logons information displayed in My CallPilot?

- a) The My CallPilot Home page
- b) The My CallPilot CallPilot Features page
- c) The My CallPilot Useful Information page
- d) The My CallPilot CallPilot Messages page

### Question 3

Where is the last logon and number of failed logons information displayed in My CallPilot?

- a) The My CallPilot Home page
- b) The My CallPilot CallPilot Features page
- c) The My CallPilot Useful Information page
- d) The My CallPilot CallPilot Messages page

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