Distributor Technical Reference Bulletin

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CallPilot Release 3.0

Introduction

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

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

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

Revision history

Issue Number / Date	Type of Review / Reason(s) for Issue	Author
Standard / 22-Nov-04	Incorporated input from Alpha/Beta trials, GNTS/MDS; and details from rev-22 Release Notes; Updated X11/X21 PEP information; Included input from external review; Initial version DTR for 3.0 GA	Technology, GNTS, MDS, and Roger Brassard
Revision 1.0 / 23-Nov-04	Updated X11/X21 and CallPilot PEP information; included additional problems/workarounds from the Beta trials	Roger Brassard
Revision 2.0 / 17-Dec-04	Updated to reference new Desktop client information; included other minor updates and formatting adjustments	Roger Brassard
Revision 3.0 / 21-Feb-05	Updated CallPilot Software CD line-up; included new known/problems workarounds; including additional detail for un-install/re-install; added RDC technical information from P-2005-0026-Global	David Saunders, Roger Brassard
Revision 4.0 / 14-April -06	Included information on CallPilot 3.0 Service Update 1, Updated known problems, removed SCCS-CallPilot integration patch reference, updated some of the tables, removed X11/X21 patch tables, included other minor updates	Behnaz Ganji
Revision 5.0 / 10- Oct -06	Added information on CallPilot 3.0 Service Update 2 and Individual PEPs, update Known/problems workaround (including new problem and removing addressed problems), updated Documentation Reference section, Included CallPilot 4.0 new language CDs	Behnaz Ganji

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1 The Distributor Technical Reference Bulletin

1.1 Purpose

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

1.2 What's new in CallPilot 3.0

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

- Simplified system re-installation process using "Image" CDs
- Hardware alignment between 703t and 1002rp
  - 1002rp Rackmount platforms now ship with MPB96 board instead of MPB16
- Two additional languages (Australian English and Japanese)
- Enhanced and condensed documentation suite including two new guides:
  - "Installation and Configuration Task List" for procedures-based tasks
  - "CallPilot Fundamentals" for an overview of all CallPilot components
- "Unified" Application Builder client that functions with 2.02/SU02 and later and 3.0 servers
- Incorporates all improvements/enhancements available from CallPilot 2.02/Service Update 3 (SU03) and Service Update 4 and CallPilot 2.5/Service Update 2.
- Includes new version of Symantec pcAnywhere (11.0)
- Includes new version of Adobe Acrobat (6.0)
- Includes fully licensed version of Symantec Ghost (7.5 – Corporate Edition)
  - Can be used for imaging the CallPilot server
- Offers Microsoft Remote Desktop Connection (RDC) as maintenance remote control option to pcAnywhere on 703t Tower and 1002rp Rackmount servers
  - Required for 201i IPE servers; reference bulletin P-2005-0026-Global for details

1.3 Supported Operations

1.3.1 Features on Controlled Release

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

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

1.3.2 Switch Integrations supported

The following switch integrations are supported:

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

1.3.3 Switch Integrations deferred

The following switch integrations will be supported in CallPilot 4.0:

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

1.3.4 Server and Client Upgrades supported

No upgrades from previous CallPilot releases will be supported with CallPilot 3.0. Upgrade support from CallPilot 2.02 and 2.5 are supported with CallPilot 4.0..

1.4 About Customer Documentation

The starting point for all CallPilot activities is the customer documentation that is included with the system. The CD-ROM titled "*CallPilot Product Release 3.0 Documentation on CD-ROM"* (NTRG19AK for English) contains all of the customer documentation available.

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

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

1.5 Software Updates/Enhancements

After installation is completed, verify whether there are any additional PEPs to be installed. At the time of updating this document, CallPilot 3.0 Service Update 1 was available Refer to PEP/Service Update application overview for additional information.

1.6 Localized Media

The table below summarizes the localized CallPilot 3.0 media available:

Language	Voice Prompts	Desktop Messaging	My CallPilot	Speech Activated Messaging	E-mail by Phone	End-User Docs
Arabic	✓					✓
Cantonese (Traditional Chinese)	✓	2.01.27.16 only				✓
Czech	✓					
Danish	✓					✓
Dutch	✓	✓			✓	✓
English, American (US)	✓	✓	✓	✓	✓	✓
English, Australian	✓	✓	✓		✓	✓
English, Canadian	✓	✓	✓	✓	✓	✓
English, Irish	✓	✓	✓		✓	✓
English, UK (Female)	✓	✓	✓	✓	✓	✓
Finnish	✓					
French, Canadian	✓					
French, European	✓	✓	✓	✓	✓	✓
German	✓	✓	2.01.27.09 only	✓	✓	
Greek	✓					
Hebrew	✓					
Hungarian	✓					
Italian	✓	✓		✓	✓	
Japanese	✓	✓				
Korean	✓					✓
Norwegian	✓					✓
Polish	✓					✓
Portuguese, Brazilian	✓					
Portuguese, European	✓					
PRC Mandarin (Simplified Chinese)	✓	✓				✓
Russian	✓				✓	
Spanish, Castilian (European)	✓				✓	
Spanish, Latin American	✓	✓			✓	✓
Swedish	✓					✓
Taiwanese Mandarin (Traditional Chinese)	✓	2.01.27.16 only				✓
Thai	✓					
Turkish	✓					✓

Notes:

1. Desktop Messaging Languages (Software and Help). 2.50.06.17 provides localized versions of the product (Dutch, English, French, German, Italian, Spanish, or Simplified Chinese).

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

2 Product Requirements

2.1 CallPilot 3.0 Compatibility

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

Product / Function	CallPilot 3.0 Compatibility
Meridian Mail	• Co-existence with Meridian Mail on Meridian 1 or Communication Server 1000/1000M/1000E is supported. Networking to Meridian Mail available with AMIS-A and Enterprise networking protocols or via VPIM with Meridian Mail Net Gateway. However, there are limitations.
Meridian Mail Reporter	• Cannot be used to generate reports from a CallPilot server. Meridian Mail Reporter only supports Meridian Mail and CallPilot Reporter only supports CallPilot.
Meridian Administration Tool (MAT) or Optivity Telephony Manager (OTM)	• Co-existence of CallPilot Application Builder client with MAT 6.x and OTM 1.x and 2.x clients on the same PC is supported. • Please see Product bulletin 99092 for the CallPilot website for a detailed listing of compatibility with MAT.
Custom Controlled Routing (CCR)	• Co-existence of CCR and CallPilot on the same Meridian 1 is supported. • CallPilot does not support CCR command: Give IVR.
Symposium Call Center Server 1.x, 3.0, and 4.x, 5.0 Symposium Express 1.0 and 2.0, 3.0, and 4.2 Contact Center - Manager Server (CCMS) 6.0	• Co-existence with Symposium Call Center Server or Express on the same M1/CS 1000 and ELAN is supported. • CallPilot 3.0 supports Symposium Call Center Server 4.2 and later integration for voice processing script commands: "Give IVR", "Give Controlled Broadcast", "Collect Digits", "Play Prompt", "Open…End Voice Session" but requires PEP SU-07 or later. • CallPilot 3.0 supports Symposium Express 4.2 integration for voice processing script commands "Give IVR" also requires PEP SU-08 or later. • CallPIlot 3.0 supports Contact Center – Manager Server 6.0
Internet Telephony Gateway (ITG)	• CallPilot AMIS-Analog and Enterprise Networking is supported with ITG R1.1 (v1.0.34 or later). • Network Message Service (NMS) support requires ITG 2.0.
Microsoft Office 2000 and 2002 (XP), 2003	• CallPilot 2.5 Desktop Messaging clients are compatible • CallPilot 3.0 and 4.0 Application Builder client is compatible

2.1.1 Migration from Meridian Mail

Migration from Meridian Mail systems to CallPilot 3.0 is supported using the Meridian Mail migration utility tape NTUB25AB (available within NTUB24AD Migration Package). This supports migration from all Meridian Mail MM11, MM12, and MM13 releases for all Meridian Mail platforms except the MSM and Card Option running MM13.11.2. It is required for all Meridian Mail releases including MM13.14 as this tape supersedes the migration utility available in the TOOLS level.

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

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

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

2.1.2 Application Builder client / Operating System (OS) compatibility

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

Notes:

1. CallPilot 4.0 Application Builder client is backward compatible for use with CallPilot 2.02/SU03 and later servers.
2. CallPilot 1.07 and 2.x (2.02 pre-SU03 and 2.5 pre-SU02) Application Builder clients are not compatible with 3.0.
3. ISO-8859-1 (Latin-1) character sets cover most West European languages including but not limited to: English, French, Spanish, Catalan, Basque, Portuguese, Italian, Albanian, Rhaeto-Romanic, Dutch, German, Danish, Swedish, Norwegian, Finnish, Faeroese, Icelandic, Irish, Scottish, Afrikaans, and Swahili.

2.1.3 Desktop Messaging / Groupware compatibility

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

Groupware E-mail clients	**1.07.11.24**	**2.50.06.17**
Microsoft Exchange 4.x	✓	
Microsoft Exchange 5.x	✓	
Microsoft Outlook 97	✓	
Microsoft Outlook 98 (Corporate Mode)	✓	✓
Microsoft Outlook 2000	✓	✓
Microsoft Outlook 2002 (XP)	Note 4	✓
Microsoft Outlook 2003		✓
Lotus Notes 4.5x	✓	
Lotus Notes 4.6x	✓	
Lotus Notes 5.0x	✓	✓
Lotus Notes 6.0		✓
Lotus Notes 6.5		✓
Novell GroupWise 5.5x	✓	
Novell GroupWise 6.0x	✓	✓
Novell GroupWise 6.5		✓
Internet Mail clients	**1.07.11.24**	**2.50.06.17**
Microsoft Outlook Express 4.x (Internet Explorer 4.0)	✓	
Microsoft Outlook Express 5.x	✓	✓
Microsoft Outlook Express 6.x		✓
Microsoft Outlook 98 (Internet Mail Mode)	✓	✓
Microsoft Outlook 2002 (XP) (Internet Mail Mode)	✓	✓
Microsoft Outlook 2003 (Internet Mail Mode)		✓
Netscape Messenger (Netscape Communicator) 4.5	✓	
Netscape Messenger (Netscape Communicator) 4.6	✓	
Netscape Messenger (Netscape Communicator) 4.7x	✓	
Netscape 6.2x		✓
Netscape 7.0, 7.1, and 7.2		✓
Qualcomm Eudora Pro 4.02	✓	
Qualcomm Eudora Pro 4.2	✓	
Qualcomm Eudora Pro 5.x	✓	✓
Thin clients	**1.07.11.24**	**2.50.06.17**
Citrix Metaframe 1.8 on Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2000 Datacenter Server		✓
Citrix MetaFrame XP (Standard, Enterprise, or Advanced Editions) on Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2000 Datacenter Server		✓

Supplemental Version Notes:

Desktop Messaging client version 2.50.06.17:

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

1.07 Desktop Messaging clients:

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

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

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

1.06/1.05 Desktop Messaging clients:

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

2.1.4 Desktop Messaging client / Operating System (OS) compatibility

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

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

2.1.5 My CallPilot / Browser compatibility

My CallPilot Web Messaging supports the following Internet browsers:

Internet Browsers	2.02 (2.01.27.09)	2.5 (2.50.06.08)	2.5 (2.50.06.19)	2.5 (2.50.06.22)	2.5 (2.50.06.23)
Netscape Navigator 4.0x					
Netscape Communicator 4.5					
Netscape Communicator 4.6					
Netscape Communicator 4.7x					
Netscape 6.2x for Windows and Mac	✓	✓	✓	✓	✓
Netscape 7.0, 7.1, and 7.2 for Windows and Mac		✓	✓	✓	✓
Microsoft Internet Explorer 4.x					
Microsoft Internet Explorer 5.x for Windows and Mac	✓	✓	✓	✓	✓
Microsoft Internet Explorer 6.0 for Windows	✓	✓	✓	✓	✓

2.1.6 My CallPilot client / Operating System compatibility

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

Operating System	2.02 (2.01.27.09)	2.5 (2.50.06.08)	2.5 (2.50.06.19)	2.5 (2.50.06.22)	(2.5
Windows 95 or 95A w/ Service Pack 1					
Windows 95B OEM Service Release 2 (OSR2)					
Windows 98	✓	✓	✓	✓	
Windows 98SE (Second Edition)	✓	✓	✓	✓	
Windows ME	✓	✓	✓	✓	
Windows NT 4.0 Workstations (Service Pack 1)			✓	✓	
Windows NT 4.0 Workstations (Service Pack 2)					
Windows NT 4.0 Workstations (Service Pack 3)	✓				
Windows NT 4.0 Workstations (Service Pack 4)	✓	✓	✓	✓	
Windows NT 4.0 Workstations (Service Pack 5)	Note 7	✓	✓	✓	
Windows NT 4.0 Workstations (Service Pack 6)		✓	✓	✓	
Windows NT 4.0 Workstations (Service Pack 6A)	✓				
Windows NT 4.0 Server	✓	✓	✓	✓	
Windows 2000 Professional		✓	✓	✓	
Windows 2000 Server, Advanced or DataCenter Server					
Windows XP Home					
Windows XP Professional	✓	✓	✓	✓	
Windows 2003 Server	✓	✓	✓	✓	
Macintosh OS 9.0 or 9.1	✓	✓	✓	✓	
Macintosh OS X			✓	✓	

Notes:

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

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

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

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

Notes:

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

2.1.8 Requirements for CallPilot Manager stand-alone web servers

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

Supported Operating Systems	Supported
Windows NT 4.0 server with SP6a and Microsoft Internet Information Server (IIS) 4	Yes
Windows 2000 server with SP1 or SP2 and Microsoft Internet Information Server (IIS) 5	Yes
Windows Server 2003 Release 2	Yes
Windows 2003 Standard Edition and Microsoft Internet Information Server (IIS) 6	Yes
Windows 2003 Web Edition and Microsoft Internet Information Server (IIS) 6	Yes
Windows 2003 Enterprise Edition and Microsoft Internet Information Server (IIS) 6	Yes

2.1.9 Platform Hardware/BIOS/Software requirements

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

Platform	Component	Version
201i	BIOS	6.0.3
703t	BIOS	16 Build 75
	Firmware	FRU SDR 5.5 BMC 1.18
1002rp	BIOS	NNCXUA07
MPB96	Release	6 (Minimum)
LSI MegaRaid 1600	Firmware	111U
LSI MegaRaid 1600	Firmware	1L37

2.1.10 Supported customer LANs

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

Notes:

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

2.1.11 Supported LAN/WAN Networking Protocols

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

2.2 Operational Requirements

2.2.1 3rd-party software and hardware

The addition of any 3rd-party software or hardware to the CallPilot server is not supported other than approved anti-virus applications (Refer to Product Bulletin P-2003-0151-Global – *CallPilot Support for Anti-Virus Applications* for details) or approved Microsoft security updates (Refer to Product Bulletin P-2006-0011-Global-Rev10 – *CallPilot Server Security Update* or published Clarify Bulletin System - Product Security Advisory Alerts). Doing so can destabilize the system; degrade its mission of providing real-time call processing performance, and cause future upgrades to fail. Refer to Product Bulletin 99067 – *CallPilot Unauthorized Hardware and Software* for more information.

2.2.2 Software dongle installation

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

2.2.3 Proper Power and Grounding

All CallPilot server installations (201i, 703t, and 1002rp) must follow the Meridian 1 and/or Communication Server 1000/1000M/1000E and CallPilot NTP guidelines for proper power and grounding, specifically, adhering to the Single-Point Ground Reference requirement. Failure to follow these guidelines makes Meridian 1/Communication Server 1000/1000M/1000E and CallPilot susceptible to damage from electrical transients resulting from lightning and other power-ground disturbances.

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

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

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

- Ensure the CallPilot server chassis and equipment racks are isolated from other foreign sources of ground
    - Acceptable isolation methods include: isolation pads, grommet washers, chassis side rail strips and non-conducting washers, etc
- Where other equipment is also installed in the same 19" rack, ensure that all equipment derives ground from the same service panel as CallPilot and the switch, whether or not the equipment is AC or DC powered.

- In DC-powered server installations, ensure the PDU (Power Distribution Unit for DC applications) is installed on the same rack as the CallPilot server. This is required since the main ground wire for the PDU is not insulated from the metal enclosure.

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

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

2.2.4 Shutdown/Restart required after PBX maintenance procedures

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

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

2.2.5 201i IPE recommended handling procedures

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

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

3 Meridian 1 switch requirements

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

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

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

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

3.1 Meridian 1 switches supported

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

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

3.2 Software Releases supported

For switch software releases supported are X11R25.40 or later.

3.3 X11 Packages required for CallPilot 3.0

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

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

3.4 X11 PEPs to support CallPilot 3.0

It is highly recommended to review the following bulletins located at http://www.nortelnetworks.com/espl for supplemental PEPs that might be applicable.
.

- X11 Release 25.40/25.40B and X21 Release 2 DepList Integration Bulletin
- X11 Release 25.47 DepList Integration Bulletin

4 Communication Server 1000 switch requirements

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

4.1 CallPilot Platforms Supported

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

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

4.2 Software Releases supported

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

4.3 X21 Packages required for CallPilot 3.0

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

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

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

4.4 X21 Release 3.0 PEPs to support CallPilot 3.0

It is highly recommended to review the following bulletins located at http://www.nortelnetworks.com/espl for supplemental PEPs that might be applicable.

- X21 Release 3.0 DepList Integration Bulletin

5 CallPilot software

5.1 CallPilot CD suite

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

PEC	CPC	Label	Version	Date	Notes
NTUB50BA	N0002819	201i Platform 3.0 Image (2 CD set)	03.03.06.02	21-Jan-05	1
NTUB50EA	N0002825	703t Platform 3.0 Image (2 CD set)	03.03.06.02	12-Oct-04	1
NTUB50FA	N0002826	1002rp Platform 3.0 Image (2 CD set)	03.03.06.02	12-Oct-04	1
NTUB40AG	A0550943	3.0 Applications CD	03.03.06.02	18-Jan-05	
NTUB50AA	N0002818	3.0 PEP CD	03.03.06.02	21-Feb-05	
NTUB41CA	N0025456	Desktop Messaging software CD	02.50.06.17	23-Nov-04	4
NTUB48AC	A0518670	2.5 My CallPilot software/updates CD	02.50.06.23	20-Sep-04	4
NTUB44AF	A0550937	3.x Language Prompts – Americas (1 of 3)	02.01.27.06	04-Nov-03	2
NTUB44BF	A0550938	3.x Language Prompts – EMEA (2 of 3)	02.01.23.13	06-Aug-04	2
NTUB44CF	A0550939	3.x Language Prompts – Asia/Pac (3 of 3)	02.01.23.13	06-Aug-04	2
NTRG19AK	N0000150	3.0 Documentation CD (English)		22-Nov-04	

Notes:

1. Which platform-image CDs are shipped, NTUB50BA, NTUB50EA, or NTUB50FA depends on which platform was ordered.
2. Updated language CDs will be made available periodically as language localization completes. Refer to the Language Availability table for details. Language CDs are interchangeable for use with all 2.x and 3.x servers. At the time of this print, the following CallPilot 4.0 Language CDs are available:

PEC	CPC	Label	Version	Date	Notes
NTUB44DA	A0550937	4.x Language Prompts – Americas	04.04.04.00	8-Jul-05	2
NTUB44EA	N0032923	4.x Language Prompts – EMEA	04.04.04.02	15-Jan-06	2
NTUB44FA	N0032924	4.x Language Prompts – Asia/Pac	04.04.04.01	15-Oct-05	2

3. Desktop Messaging software CD version 2.50.06.17 contain support for localized languages (refer to the Localized Media table for details.
4. My CallPilot CD version 2.50.06.22 and later contain support for localized languages (refer to the Localized Media table for details)
5. At the time of updating the documents available CallPilot 4.0 Application Builder and CallPilot Manger recommended to be used with CallPilot 3.0 are: PEP CP404S02G08C CallPilot Manager 4.0 (04.04.04.12) and PEP CP404S02G05A Application Builder 4.0 (04.04.04.04). They can be obtained from the ESPL PEP Library.

5.2 Default Passwords

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

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

Note: Sites using a non-North American (US) keyboard, may encounter issues when initialing attempting to log into the server. To overcome this, enter the password using keystrokes similar to a US-keyboard. For example, when entering "Bvw_250!#", use shift-3 to indicate the "#" character.
Note: When logging into an account, or running Configuration Wizard for the first time, you must change the passwords.

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

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

6 Feature Information and Limitations

6.1 Language Availability

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

CD version	Language filename	Language
Americas (04.04.04.00)	Lang1046	Brazilian Portuguese
	Lang1033	English (American)
	Lang4105	English (Canadian)
	Lang3084	French (Canadian)
	Lang3082	Latin American Spanish
EMEA (04.04.04.01)	Lang1025	Arabic
	Lang1027	Catalan
	Lang1029	Czech
	Lang6	Danish
	Lang1043	Dutch (Standard)
	Lang2057	English (Female European)
	Lang6153	English (Irish)
	Lang 2070	European Portuguese
	Lang11	Finnish
	Lang1036	French (Standard)
	Lang1031	German (Standard)
	Lang1032	Greek
	Lang1037	Hebrew
	Lang1038	Hungarian
	Lang1039	Icelandic
	Lang1040	Italian
	Lang1044	Norwegian
	Lang1045	Polish
	Lang25	Russian
	Lang1034	Spanish (European)
	Lang29	Swedish
	Lang1055	Turkish
Asia/Pacific (04.04.04.01)	Lang3076	Chinese (Cantonese)
	Lang1042	Korean
	Lang3081	English (Australian)
	Lang17	Japanese
	Lang1028	Mandarin Chinese (Taiwan)
	Lang2052	PRC Mandarin
	Lang1054	Thai

6.2 Speech Activated Messaging and Custom Commands

The Speech Activated Messaging and Custom commands features are currently only supported using North American English and Canadian English languages (found on the Americas language CD NTUB44DA / A0550937) and German (found on the EMEA language CD NTUB44EA / N0032923).

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

- Euro French
- UK English
- Italian
- Japanese

6.3 Meridian Mail Migration

Migration from Meridian Mail systems to CallPilot 3.0 is supported using the Meridian Mail migration utility tape NTUB25AB (available within NTUB24AD Migration Package). This supports migration from all Meridian Mail MM11, MM12, and MM13 releases for all Meridian Mail platforms **except the MSM and Card Option running MM13.11.2**. It is required for all Meridian Mail releases including MM13.14 as this tape supersedes the migration utility available in the TOOLS level.

Notes:

- Previous 1.07 versions of the migration utility NTUB24AA or NTUB24AB cannot be used with CallPilot 3.0. The Migration guide should be consulted for limitations.
- It is highly recommended the latest documentation be referenced when performing a migration. At the time of this printing, refer to NTP 555-7101-801 Meridian Mail to CallPilot Migration Utility Guide, Release 3.0, Standard 1.0, dated November 2004.
- The Mailbox Number is a unique identifier on both the Meridian Mail and CallPilot voice mail systems. If the migration utility encounters a CallPilot mailbox with the same number as a Meridian Mail mailbox, then the utility will overwrite the existing mailbox in order to avoid a duplicate.
- CallPilot requires use of the NTRB18CA MGate card for connectivity. Systems migrated from Meridian Mail must ensure only the updated MGate cards are used.
- Unlike Meridian Mail where calls were directly routed to the main ACD-DN (queue) feeding Meridian Mail ports, a CDN is used to route calls to CallPilot. It is imperative that all calls be routed through the CDN and not directly to the ACD-DN associated with CallPilot channels. See the Migration guide for details

7 Procedures

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

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

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

7.1 Installing from Image CD – Disaster Recovery

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

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

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

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

7.1.2 IPE (201i) platform:

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

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

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

7.2 Fresh Install – CallPilot Server

Notes:

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

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

10. Connect to the CLAN. Download virus definition updates.
11. Download and install latest approved security patches / critical updates from Microsoft using the 'Start/Windows Update' menu. Refer to bulletin P-2005-0056-Global "CallPilot Server Security Update"

7.3 Fresh Install / CallPilot Manager Stand-alone web server

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

7.4 Software re-install

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

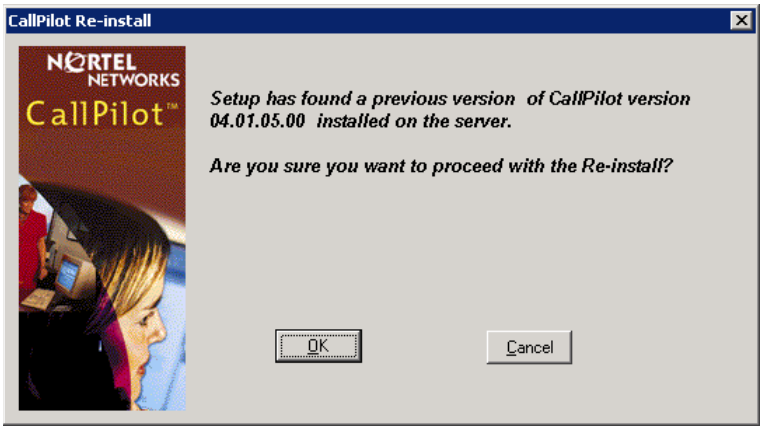
7.4.1 CallPilot Server Uninstall / Reinstall / Install

The CallPilot Server install / reinstall / upgrade executable (setup.exe) can be found in \CallPilotInstall on the Applications CD. Upgrading the CallPilot software will be completed using a new image set of CDs and accompanied by an upgrade and setup wizard. DO NOT upgrade to a later version of CallPilot using a later Applications CD, as this will cause problems with your upgrade.

7.4.1.1 CallPilot Server Reinstall

Re-installing the CallPilot software restores the CallPilot software to its original state from the CallPilot Applications CD. Currently configured data and messages will not be lost. Another common term for reinstall is dummy upgrade. A reboot is required after the reinstall.

A window similar to the following will be displayed based on your version of software;

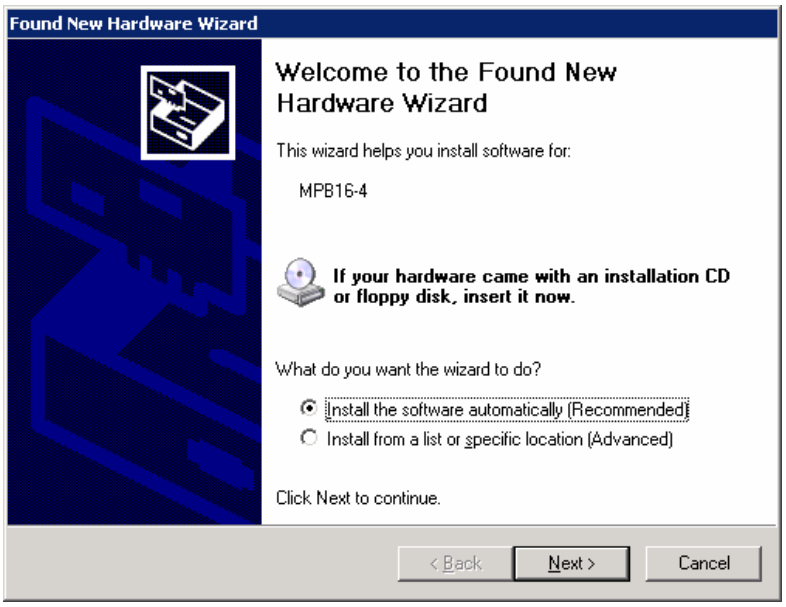


7.4.1.2 CallPilot server Uninstall

Uninstalling the CallPilot software completely removes the CallPilot application from the CallPilot server, including the currently configured data and messages. Once the install completes, a system reboot is required. To uninstall the CallPilot system, execute the following;

1. Start > Programs > CallPilot > Uninstall
2. Enter Yes to the prompt.
3. Enter Yes to the shared component prompts
4. Once complete reboot your system

During the uninstall process, the drivers for the multimedia cards (MPB) are removed. When the system is rebooted, Windows detects the fact that MPB card(s) are unconfigured and the Windows hardware wizard executed. It is important to press the cancel button to the wizard, otherwise a blue screen will occur on the system. CallPilot Install will load the MPB drivers in their required locations and perform the configuration.

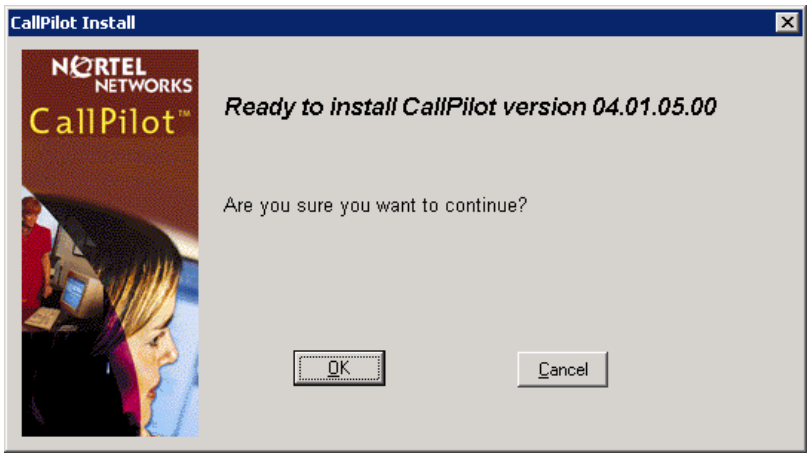


When this screen is observed, it is imperative that the Cancel button is pressed, otherwise a blue screen will appear. CallPilot Install loads and configures the required drivers.

7.4.1.3 CallPilot server Install

Installing the CallPilot software copies a fresh copy of software from the Applications CD. The system must then be configured and customer data possibly restored. If any other version of CallPilot is found on the system, either an upgrade or Reinstall will be performed, as displayed.

A screen similar to the following will be displayed with the current version of software being installed.



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

7.4.2 CallPilot Manager Uninstall / Install

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

7.4.3 pcAnywhere 11.0.1 uninstall / install / reinstall

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

7.4.4 pcAnywhere uninstall

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

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

7.4.5 Adobe Reader 6 uninstall / install / reinstall

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

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

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

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

7.4.7 Sun Java Run Time Environment

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

7.5 Change in location of various Windows OS-centric utilities

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

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

8 Known Problems / Issues

8.1 Server

8.1.1 Server OS Activation

If the server does not have the correct release of the BIOS / firmware, the O/S requires activation after the image is installed. If the system is not activated within 30 days it will be blocked from logging into the Windows 2003 system if logged out. Options at that point are (1) activate your system using the COA via the internet or phone, or (2) re-image your system for another 30 day trial period. If after installing an image you adjust the date past the 30 day activation period the system will lock and you will have to activate it or install it from an image again. Upgraded 703t Tower systems require product activation as part of the upgrade process.

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

8.1.2 CP 201i Windows 2003 Shutdown Doesn't Work

Unable to use reset button on 201i to boot the server.

Workaround: The 201i servers power supplies were never designed to be "shut-off" by the OS Temperoarily remove the server from the shelf for a small amount of time (say 30 seconds). Upon reseeding the 201i into the shelf it will function normally."

8.1.3 Using Wrong Image CD

Using the wrong image CD on a server (i.e. 201i or a 1002rp) will cause unpredictable results i.e. the image will install but the system may not work correctly, CR Q00927821.

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

8.1.4 Blue Screen after updating device drivers

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

Workaround: Cancel out of the Windows Device Manager if MPB16-4 or MPB96 media cards are found as new hardware, DO NOT PRESS NEXT. Only use documented NTP procedures for updating any device drivers.

8.1.5 Unable to restore archive from earlier TRIAL release

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

8.1.6 Unable to change password via Configuration Wizard

When the "Finish" button is clicked, at the last page in Configuration Wizard dialog, the server is updated with all new information provided by user. During this phase, the Configuration Wizard will try to update the password, but could fail, due to the Windows 2003 security policy ("Minimum Password Age") if the policy value is set to a value greater than zero (0).

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

8.1.7 "No Dongle Found" error after installation

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

Workaround: Reboot the server.

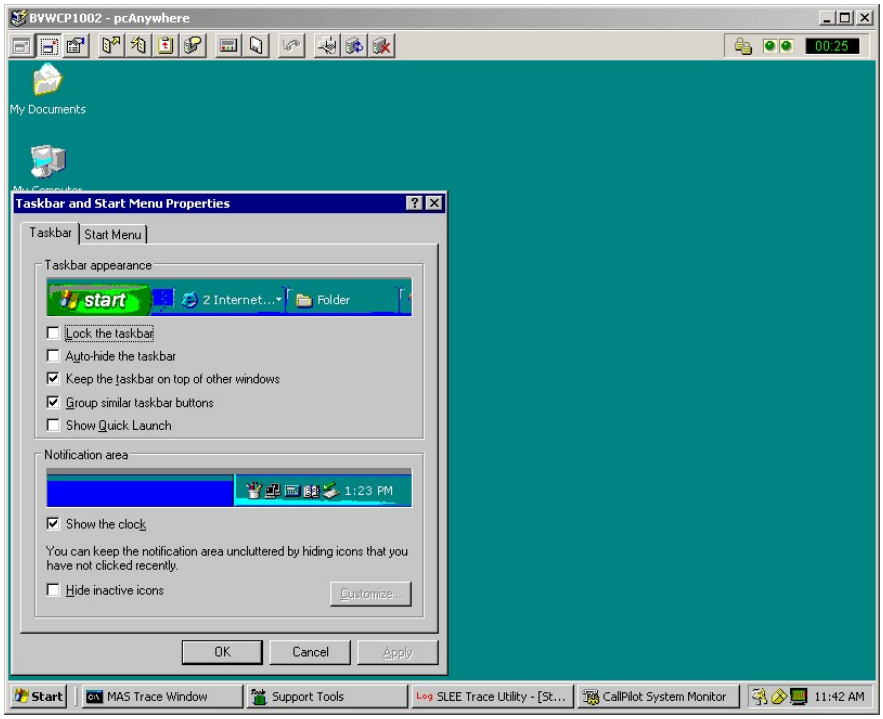
8.1.8 "RDP Protocol Component – Data Encryption" error

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

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

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

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



8.1.10 Windows Task Bar appears to be missing

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

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

8.1.11 List Tape function is too slow

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

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

8.1.12 Remote Disk backup to network share takes excessively long time

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

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

1. Click Start > Settings > Network Connections
2. Right-click on the NIC Card and click on Properties. The CLAN (or ELAN) Properties screen will appear.
3. Click on the Configure... Button. The Network Connection screen will appear.
4. Select the Advance Tab
5. For 703t and 1002rp:
    a. Highlight Link Speed and Duplex then select the required setting from the Value Drop-down Box on the right. Default value is Auto-Detect.
6. For 201i:
    a. Highlight Duplex then select the required setting from the Value Drop-down Box on the right. Default value is Auto-Detect.
    b. Highlight Speed then select the required setting from the Value Drop-down Box on the right. Default value is Auto-Detect.

8.1.13 Unable to log into Windows

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

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

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

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

8.1.14 CallPilot server freezes after a restart

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

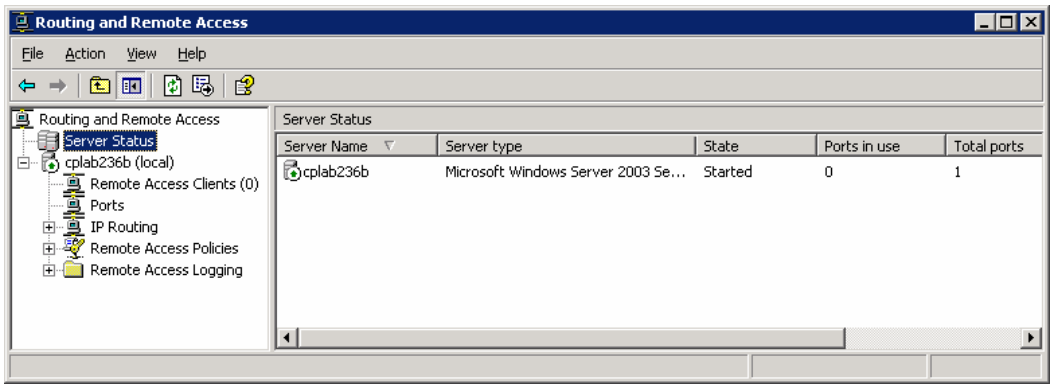
Workaround: If this condition occurs, rebooting the server a second time will clear the condition. A PEP is available for CallPilot 3.0 GA, CP300S00G11S

8.1.15 RAS connection to server unstable and drops

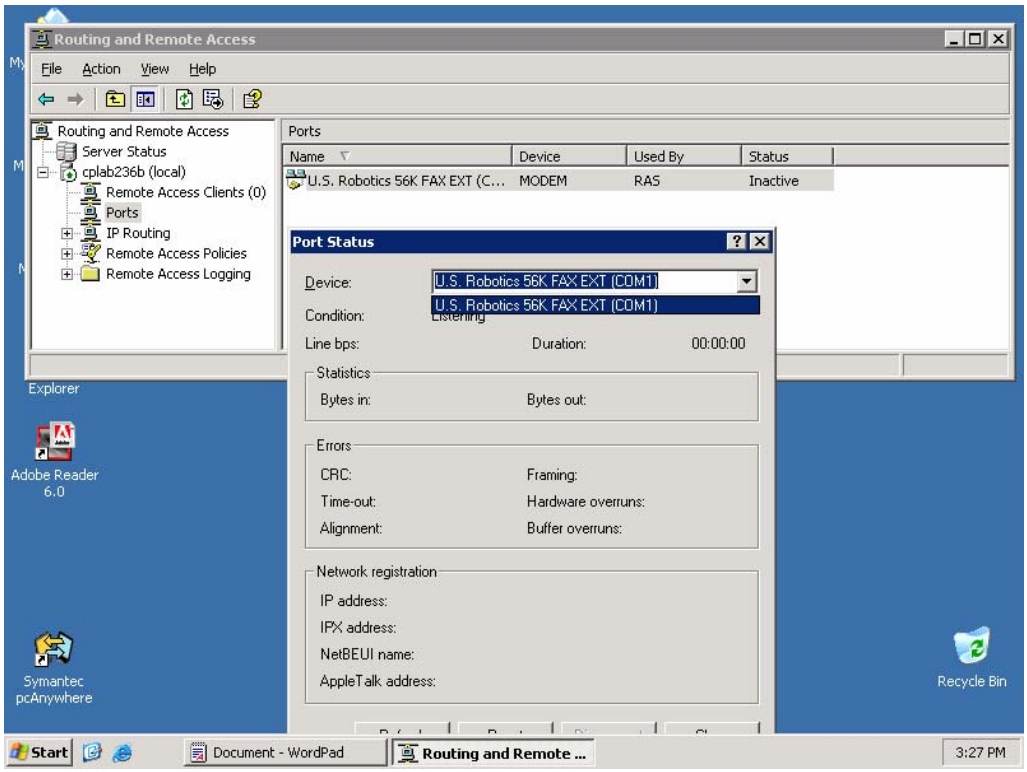
When the client makes a connection to a CallPilot server through a modem and RRAS, the connection appears unstable and finally drops. The connection is negotiated, modem to modem, then RRAS on the server side assigns temporary IP addresses to both the client and the server. From the client, when the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

Workaround: The problem described above may occur if two (2) modem devices are configured for COM1, the one that was actually connected (US Robotics 33.6 FAX Ext. PnP) and one not connected to the system, in CallPilot's case the Standard 33600 Modem. Because of this, it instability is caused by the incorrect driver being used for the US Robotics modem.

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



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



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

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

8.1.16 ELAN Disables After RDC Connection Over RRAS IP Address

When using Remote Desktop Connection (RDC) to connect to a Windows Server 2003 based CallPilot server via a dial-up RRAS(Routing and Remote Access service), a frozen screen might be observed and CallPilot going out of service for a couple of minutes.

Workaround: At the time of this printing, Microsoft is working on a fix. It is recommended to use a high-speed connection when using RDC via RRAS.

8.1.17 SLEE Trace Facility Causing 38003 Event and Possible Outage

The application event log gets flooded by minor 38003 events from Resource Package with the following description:
"An unexpected Windows message was received [Message = XXXXX, TID=YYYY]".

They are generated at rate of more than a dozen of events per second. Though, it seems to bring no obvious negative impact, such unusual activity can potentially result in performance degradation. CR # Q01428821.

Workaround:

You can still use the SLEE trace utility safely using the following rules:

1. Leave the tool running after you are done, just stop tracing (pencil button);

2. Reboot the CallPilot to close the tool safely during a maintenance window

8.2 CallPilot Manager

8.2.1 Unable to log into CallPilot Manager due to unknown password

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

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

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

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

8.3 Event Monitor/Viewer

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

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

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

8.4 Alternate User Interface

8.4.1 Menu User interface users unable to log in

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

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

9 PEP/Service Update application overview

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

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

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

9.1 PEP Numbering Format

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

Where:

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

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

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

9.2 CallPilot SU/PEPs

At the time of this printing, Service Update 2 is available for download. CallPilot Service Update 1 is obsolete by CallPilot Service Update 2. For future reference, this section covers all Service Updates and PEPs with CR details.

9.2.1 Service Update CP30306SU01S

PEP number	Description
CP30306SU01S	Service Update 1 (SU01) which also installs the following General Available PEPs: CP303S01G05S, CP303S01G09S, CP303S01G10S, CP303S01G11S and Limited PEP (platform dependent) CP303S01L12S.

CallPilot 3.0 Service Update 1 replaces the following PEPs. The replaced PEPs will be automatically uninstalled when installing CP30306SU01S.

- CP300S00G09S
- CP300S00G11S
- CP300S00G15S
- CP300S00G17S
- CP300S00G19S
- CP300S00G20S
- CP300S00G21S
- CP300S00G23S

9.2.2 CallPilot Service Update 1 Individual PEPs

PEP number	Description
CP404S01G08A	Application Builder client (04.04.04.02) – Recommended to be used with CallPilot 3.0
CP300S00G01A	Application Builder client (03.03.06.02) for use with CallPilot 3.0 and 2.02/SU03 and later servers
CP404S01G11C	CallPilot Manager(04.04.04.03) – Recommended to be used with CallPilot 3.0
CP300S00G10C	CallPilot Manager (03.03.06.03) – Required for use with CallPilot 3.0
CP303S01G05S	SCCS-CP integration - phantom calls on CallPilot side.
CP303S01G09S	IMAP service crashes frequently with event 41505/All calls have digitized or

	Garbled Voice
CP303S01G10S	Minimum channels for CallPilot SDN is not working properly
CP303S01G11S	CallPilot is experiencing ring no answer when making changes in DB values
CP303S01L06S	One Number Voice/Fax Call Answering feature
CP300S01L12S	Deeply nested Appbuilder Applications causing ring and drop scenario
CP300S01R04S	Multi-part thru-dial and incorrect greeting update.
CP303SEC003S	Server Security Update w/ Microsoft hotfixes up to MS05-053.
CP303SECSP1S	Service Pack 1 for Windows Server 2003

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

9.2.3 Service Update CP30306SU01S Content

The following fixes and enhancements are addressed with CP30306SU01S:

CR	Title
Q00681013	Intermittent failure of transfer to DN when using CallPilot treatment with SCCS
Q00708444	System Monitor tool does not show the PEPs installed on the system
Q00776665	LDAP leaking Memory
Q00840397	Restore CallPilot from FSB skips the file "D:\Nortel\Data\schemamap"
Q00859634	During 40 channel load test due to play problem in MAS resources SLEE crashes
Q00888949	System becomes inoperative after restore of backup with different version
Q00901042	Voice Item Maintenance fails to record for the full allotted time
Q00902745	Several warning events 40254 in application logs
Q00918163	Annoying event 58534 is seen in the Windows NT Application Event log
Q00922396	SLEE is receiving incorrect data from TAPI on session init. Phantom call events
Q00930687	Pegging problem: Excessive Incomplete Messaging Accesses Alert Report
Q00931356	AML Trace Enhancements
Q00933261	ELAN Issues Preventing CallPilot to Boot
Q00937327	Notification server consumes more than 90% CPU
Q00939071	Migrate.exe version 3.2.1.0 Application error version 3.2.1.0 EVENT 1000
Q00942091	TSP memory corruption causing call processing outage
Q00954025	Messages deleted from telset are still there in 2nd login
Q00955276	Events 36027, 36033 should be modified
Q00959365	Getting ring no answer on Multimedia ports with SCCS integration
Q00959966	Events 55045 and 55046 added into Fault Manager
Q00966310	Can not login to Desktop Messaging when password due to expire
Q00972736	RNA after upgrade to 2.02:too many SDN entries
Q00977032	Event descriptions should be updated in the CallPilot Manager
Q00982422	AppBuilder Applications inaccessible and unavailable after SU03 was applied
Q00987148	IVR channels are not correctly displayed in Channel Monitor
Q00988007	Network wide broadcast messages fails to be delivered

Q00991166	IMA service is consuming 100% CPU usage
Q00996757	Infinite loop in Version Manager because of data corruption
Q00999036	Unable to open locked applications
Q01002510	Memory error appears after CallPilot server reboot
Q01010963	With 2 authentication methods and SSL enabled, a VPIM message can't be sent out
Q01017361	Cannot use the Remote Disk Backup to Subfolders
Q01018679	CallPilot server freezes after a restart (Ctrl Alt & Delete)
Q01023311	CallPilot RNA. System Monitor shows both DSPs and DSOs Idle
Q01039276	OM data collection turning off intermittently and requires a reboot to start
Q01039807	Problem with backups, Database is being skipped
Q01046083	System backup failed but the status said it was completed successfully
Q01057676	Application Builder ring once and drop
Q01058368	CallPilot RNA with TSP events 42803
Q01059475	AppBuilder Data Integrity & deletion tool (appdelete) goes into indefinite loop
Q01068557	Modifications to LDAP for Email account administration
Q01074485	RNA with Fatal Exception 42803 worktype 17
Q01087961	One ring and drop on all applications
Q01090487	Messaging Management page is damaged if user has some changes on it
Q01101119	CallPilot Servers connected to same Reporter server had RNA
Q01116404	Install PEPs and SUs without stopping Windows and CallPilot services
Q01119325	Database API tool allows distributor to obtain FULL access to database
Q01127749	CallPilot messages Telset Time stamp 1 hour out for New Zealand prior to daylight saving
Q01144219	Trace viewer utility from Support Tools is shutting down
Q01149295	MeridianMail to CallPilot migration: the COS record could not be created, RC [60638]
Q01152586	System disconnects when user dials to VIM SDN
Q01154562	GIVE CONTROLLED BROADCAST Fails Intermittently - RNA / Delayed Answering
Q01161352	CallPilot Server security was compromised through FTP Service
Q01161943	ACCESS channels in PBX go MSB LOG OUT when CallPilot reboots

9.2.4 Service Update CP30306SU02S

PEP number	Description
CP30306SU02S	CallPilot 3.0 Service Update 2 (SU02) which also installs the following individual PEPs: CP303S02G01S and CP303S02L04S.

Note:
1. PEP CP30306SU02S installs Service Update 2 and the following PEPs:

- Target platform - 201i:
  - CP30306SU02S
  - CP303S02G01S

- Target platforms - 703t, 1002rp:
  - CP30306SU02S
  - CP303S02G01S
  - CP303S02L04S

2. The PEP replaces the following PEPs. The replaced PEPs will be automatically uninstalled when installing CP30306SU02S.

   - CP303O6SU01S
   - CP303S01G05S
   - CP303S01G08S
   - CP303S01G09S
   - CP303S01G10S
   - CP303S01G11S
   - CP303S01G14S
   - CP303S01G15S

9.2.5 CallPilot Service Update 2 Individual PEPs

PEP number	Description
CP404S02G05A	Application Builder client (04.04.04.04) – Recommended to be used with CallPilot 3.0
CP404S02G08C	CallPilot Manager(04.04.04.12) – Recommended to be used with CallPilot 3.0
CP303S02G01S	Calls RNA/Event ID 1 SQLany Fatal Error Memory Exhausted
CP303S02L04S	Server outage when saving application
CP303SEC003S	Server Security Update w/ Microsoft hotfixes up to MS05-053.
CP303SECSP1S	Service Pack 1 for Windows Server 2003

9.2.6 Service Update CP303O6SU02S Content

The following fixes and enhancements are addressed with CP30306SU02S:

CR	Title
Q00492049	Daylight Savings time switches at wrong time for Satellite users in different TZ
Q00858851	CallPilot doesn't drop/release DSP if not recording any command during training
Q00869407	User mailbox with User admin right could not view/open other mailbox
Q01011396	SCCS-CP integration - a lot of phantom calls on CallPilot site
Q01076995	Discrepancy between the number of mailboxes on the server and Reporter
Q01125942	T1 Remote Notification Disabling Itself after SU02 install
Q01146189	Incorrect Time stamp on Email by Phone
Q01153542	Events 38007, 58207, & 55213 cause RNA
Q01159874	Database skipped during restore of system backup - restore log needs enhancement

Q01183067	Unable to deliver fax to more than 29 recipients using DTF Feature
Q01183921	CP is experiencing ring no answer when we make changes in DB values
Q01190522	Logging into CDN After Receiving RN to Telephone Not Playing AUI
Q01211286	IMAP service crashes frequently with event 41505 rc=243
Q01213280	AUI: Incorrect RPL is used for thru-dialing after login
Q01214250	Outbound fax stops working with IMA crash
Q01218326	RNA - ALL DSPs active - All DSOs idle except for one
Q01241448	"EVT41505 NMAOS"
Q01241548	All calls have digitized or Garbaled Voice
Q01274618	Remote text notification intermittently fails sending to blackberry
Q01303303	Reporter shows all zero's OM not collecting on the Blue database
Q01307621	Calls RNA/Event ID 1 SQLany Fatal Error Memory Exhausted
Q01332316	OM Server: Event 41052 needs to be added

10 Documentation References

The following table provides a list of supplemental documentation, available at the time of this printing, which may be useful in support of CallPilot 3.0 servers.

These documents are available on the following web sites:

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

Document/Bulletin Type	Document Number	Description
Product	99067	CallPilot Unauthorized Hardware and Software
Product	P-2005-0243-Global	CallPilot Spares Planning
Product	P-2003-0151-Global	CallPilot Support for Anti-Virus Applications
Product	P-2005-0026-Global	CallPilot 3.0 and 201i IPE Platform – Using Microsoft Remote Desktop Connection
Product	P-2005-0038-Global	CallPilot 1002rp Rackmount Status Update
Product	P-2005-0167 -NA	CallPilot Sever-Level Replacment Procedures
Product	P-2005-0173-Global	CallPilot: LSI Logic MegaRAID SCSI 320-2 Hardware Introduction
Product	P-2006-0011-Global	CallPilot Server Security Update
Product	P-2005-0167 -NA	CallPilot Sever-Level Replacment Procedures
Product	P-2006-0103-Global	CallPilot 703t Tower Server Availability
Product	P-2006-0256-Global	CallPilot Support for Additional Windows Server 2003 Editions
Product	P-2006-0288-Global	Multimedia Applications Products – Interim Compatibility Advisory for Microsoft Internet Explorer Release 7.0
Product	P-2006-0329-Global	CallPilot Tower/Rackmount Platform Disk Drive Updates
Retirement	R 2006-0240	Meridian Mail Message Service Module (MSM) End of Life Date Change
Sales/Marketing	SM-2002-1578-NA	Meridian Mail to CallPilot Investment Protection Offer
Sales/Marketing	SM-2004-0379-NA	Meridian Mail Investment Protection Offer Expiration
Sales/Marketing	SM-2004-0416-Americas	CallPilot 3.0 Channel Readiness Activities
Sales/Marketing	SM-2004-0487-Americas-Rev 2	CallPilot 3.0 GA for Tower and Rackmount Platforms
Sales/Marketing	SM-2005-0043-Americas	CallPilot 3.0 GA on 201i IPE Platform

Appendix A: CallPilot/SCCS/CCMSIntegration

CallPilot 3.0 / Symposium Call Center Server 4.2 Integration checklist

The following items should be reviewed to ensure proper integration between Symposium Call Center Server 4.2 and CallPilot 3.0 for Voice Services.

Software pre-requisites:

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

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

Documentation available:

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

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

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

PBX configuration guidelines:

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

Additional general notes:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

7. Migrating duplicate names for Access voice segments
   When migrating voice segments using SCCSPromptsOnly option, ensure there is no duplicate name for ACCESS voice segments in Meridian Mail. Duplicate ACCESS voice segment will halt the migration process on CallPilot, CR Q01136955 fixed in CP 4.0 release.

   Workaround: To reconnect to Meridian Mail and change the voice segments names to unique names and proceed with migration.

8. **SCCS requires VOICE channels for integration**

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

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

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

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

    In these (and possibly other) occasions, it is required to forcibly de-acquire resources from the Meridian 1/Communication Server 1000/1000M/1000E. Some commands have been developed as tools to perform these tasks, such as:

    - De-acquire all acquired devices of application over a specified ELAN link
    - De-acquire an acquired Agent TN
    - De-acquire an acquired Route of a Customer
    - De-acquire an acquired CDN
    - De-acquire an acquired ACDDN.

The commands to de-acquire each of the resources are:
From Overlay 48 (LD 48):

1. De-acquire an acquired "AGENT":
   DACR AGT <Loop> <Shelf> <Card> <Unit><CR>
2. De-acquire an acquired "ROUTE":
   DACR RTE <Route#> <Customer#><CR>
3. De-acquire "ALL" acquired devices on a specified link:
   DACR ALL <Link#><CR>

From Overlay 23 (LD 23):

4. De-acquire an acquired "CDN":
   REQ <DACR>
   TYPE <CDN>
   CUST <Customer#>
   CDN <XXXX>
5. De-acquire an acquired "ACDDN":
   REQ <DACR>
   TYPE <ACD>
   CUST <Customer#>
   ACDN <XXXX>

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

SCCS 5.0 SU05 IVR ports do not come into service with CallPilot/SCCS integration

IVR ports will not come into service ie. will not go idle on systems with CallPilot/SCCS Integration when Host Enhanced Routing (HER) is disabled. CallPilot can not correctly process the Application Registration Response message from SCCS with the Cause x78 IE. Subsequently, the IVR ports would not come into service.

Workaround
A designer patch has been created with this fix on top of 0505. The DP number is NN_SCCS_5.0_DP_050501_S. Please contact your first level support to obtain the designer patch.

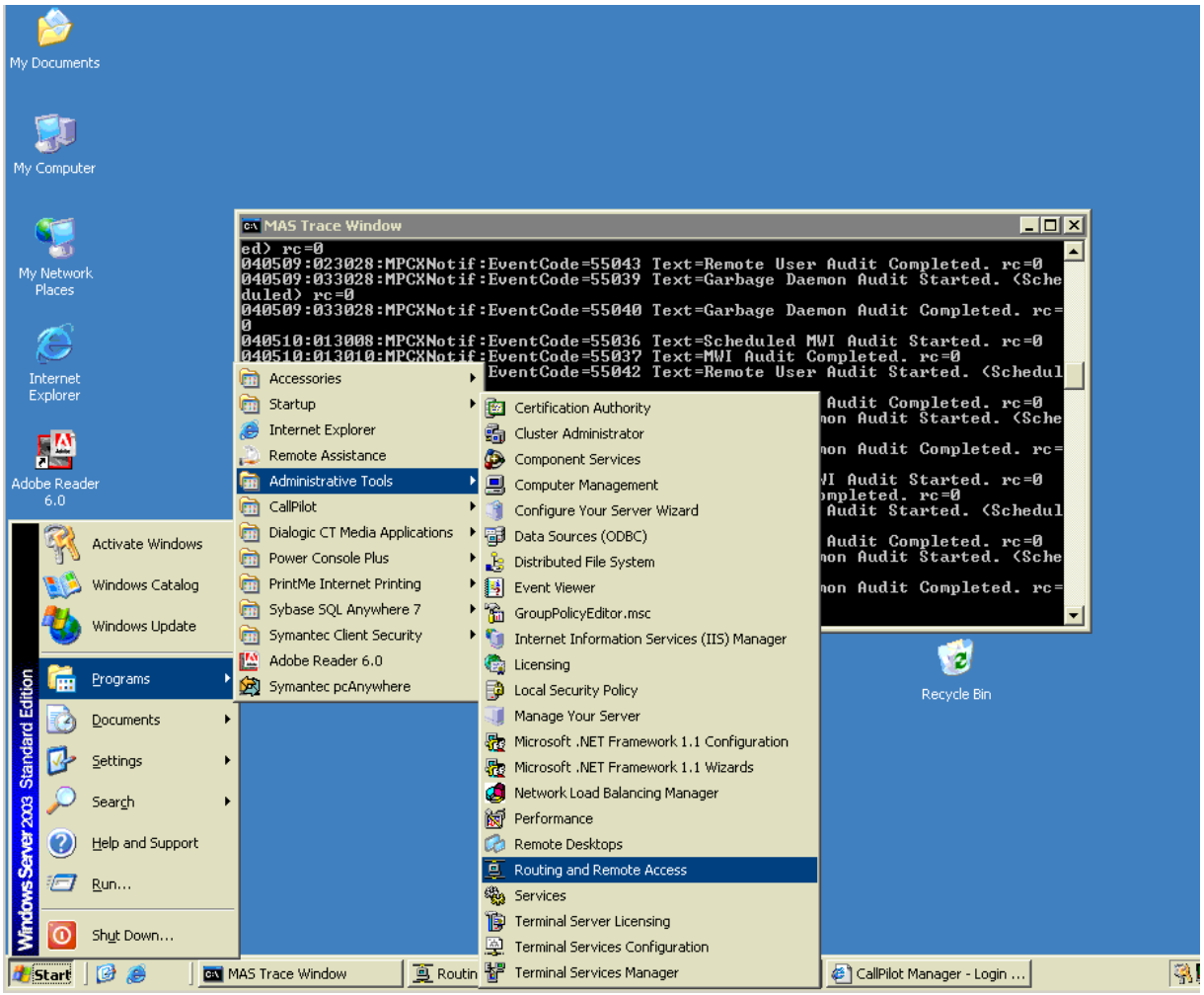
Appendix B: RRAS configuration

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

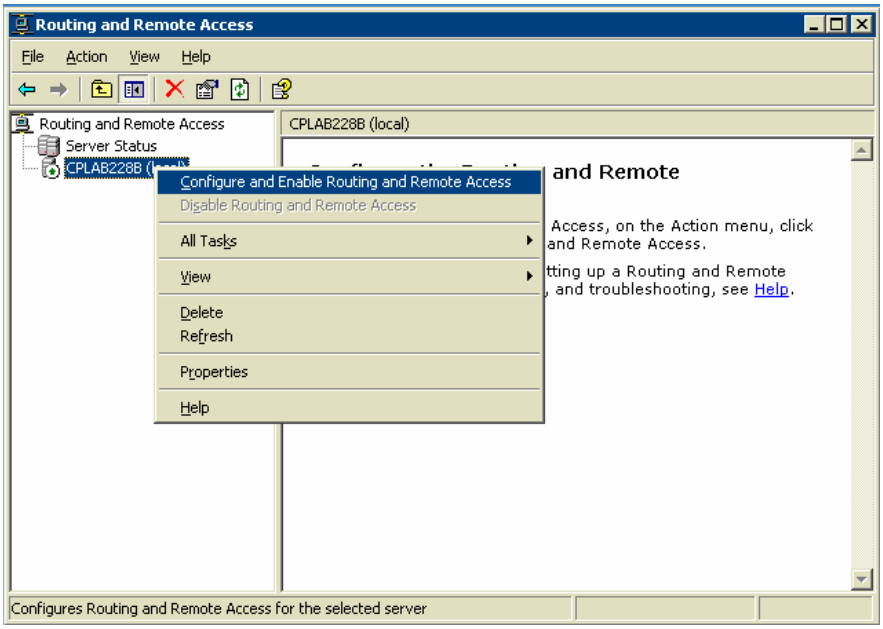
Note: CallPilot (build 03.03.06.02) now includes the RRAS configuration and the following steps are no longer required. The information below is for reference purposes only.

Enable RRAS:

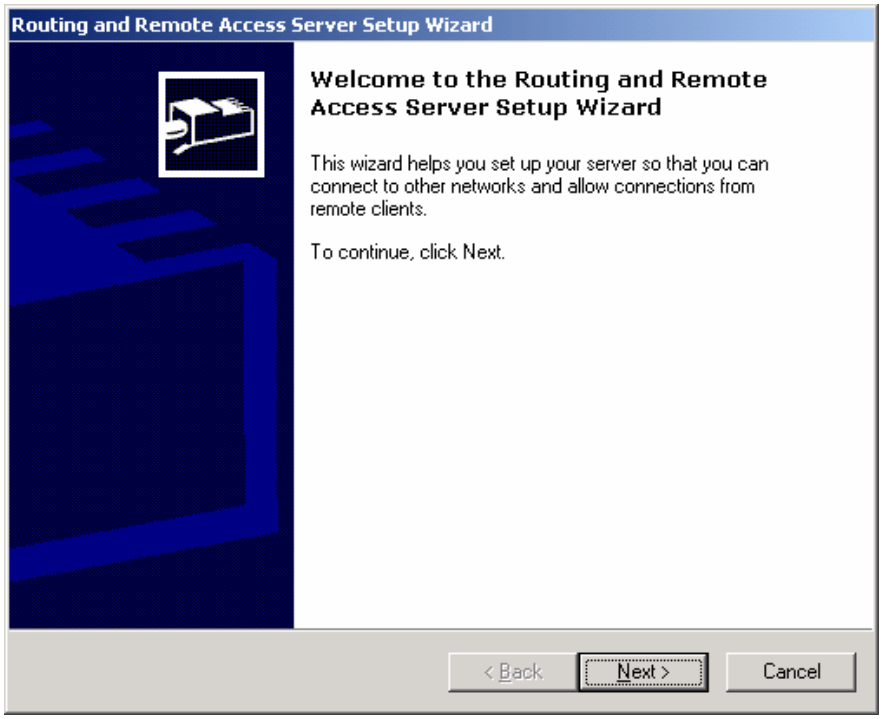
1. Launch the Routing and Remote Access (RRAS) manager:
   (Start -> Administrative Tools -> Routing and Remote Access).



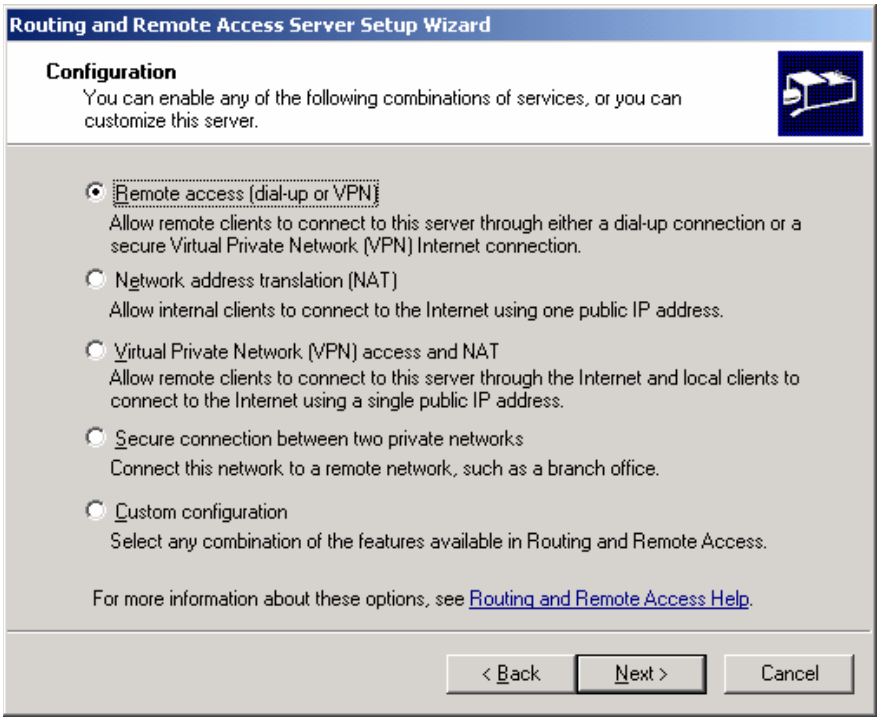
2. Select the server, right click and select "Configure and Enable Routing and Remote Access" from the context sensitive menu.



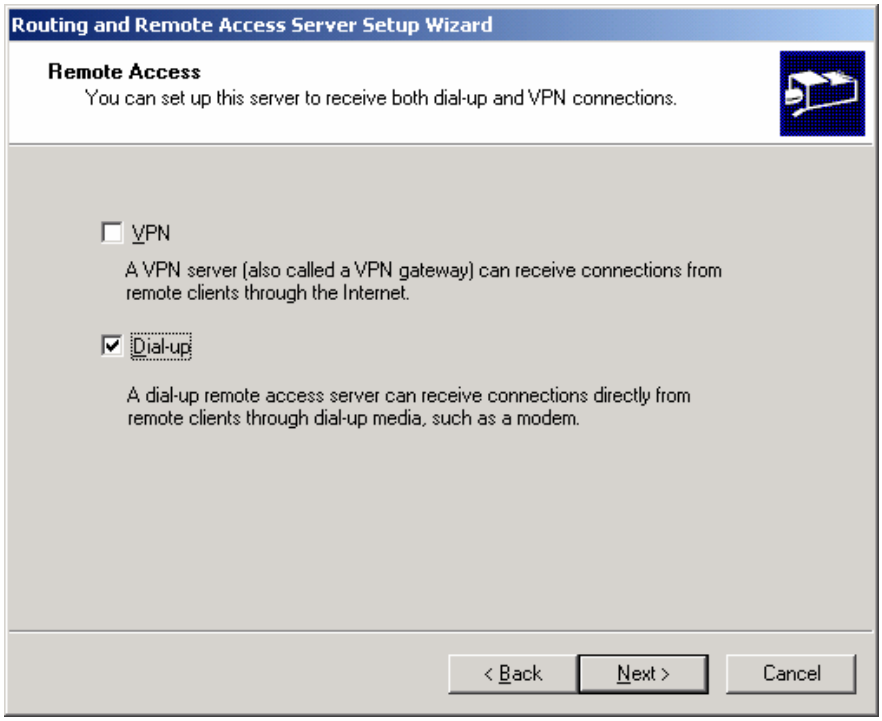
3. The RRAS setup wizard will launch. Click on **Next** to begin the configuration.



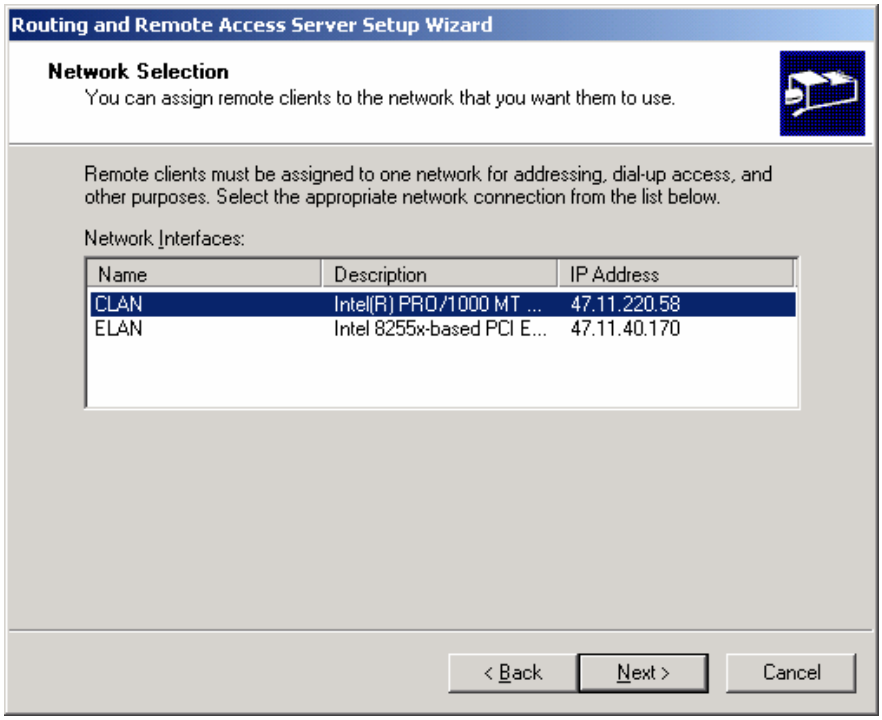
4. Select “Remote access (dial-up or VPN), and click **Next**.



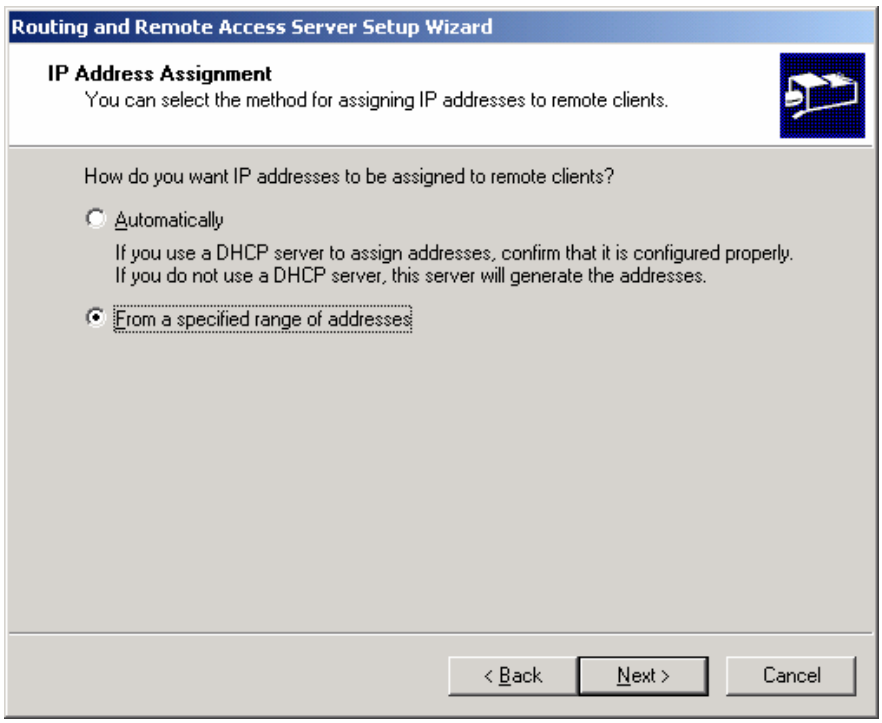
5. Select Dial-up and click **Next**.



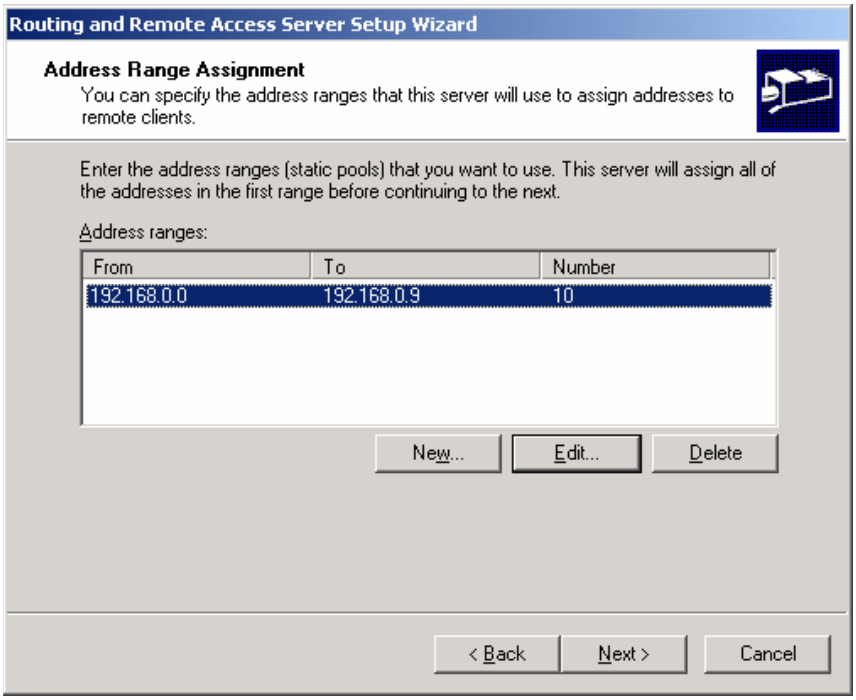
6. Select remote clients that should be assigned to the network connection with the name CLAN and click **Next**.



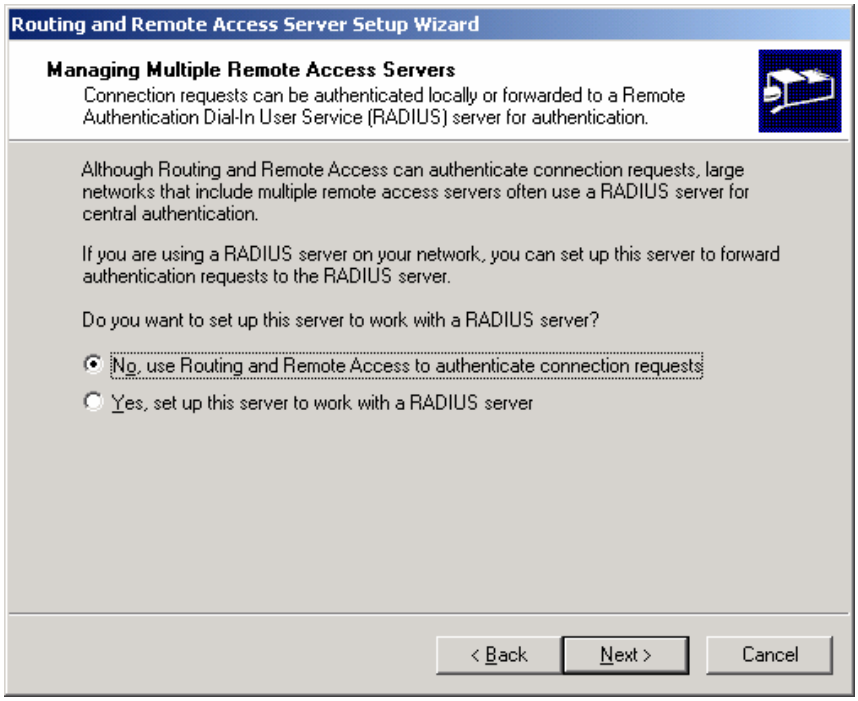
7. Select to assign IP addresses from a specified range and click **Next**.



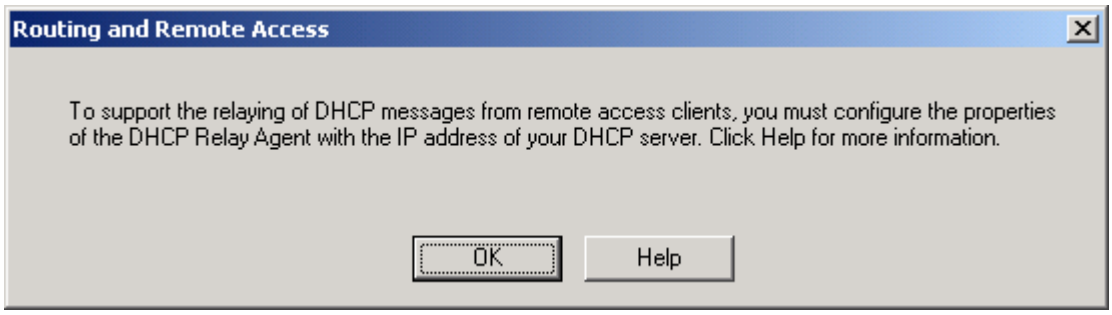
8. Add a new range from 192.168.0.0 to 192.168.0.9, and then click **Next**.



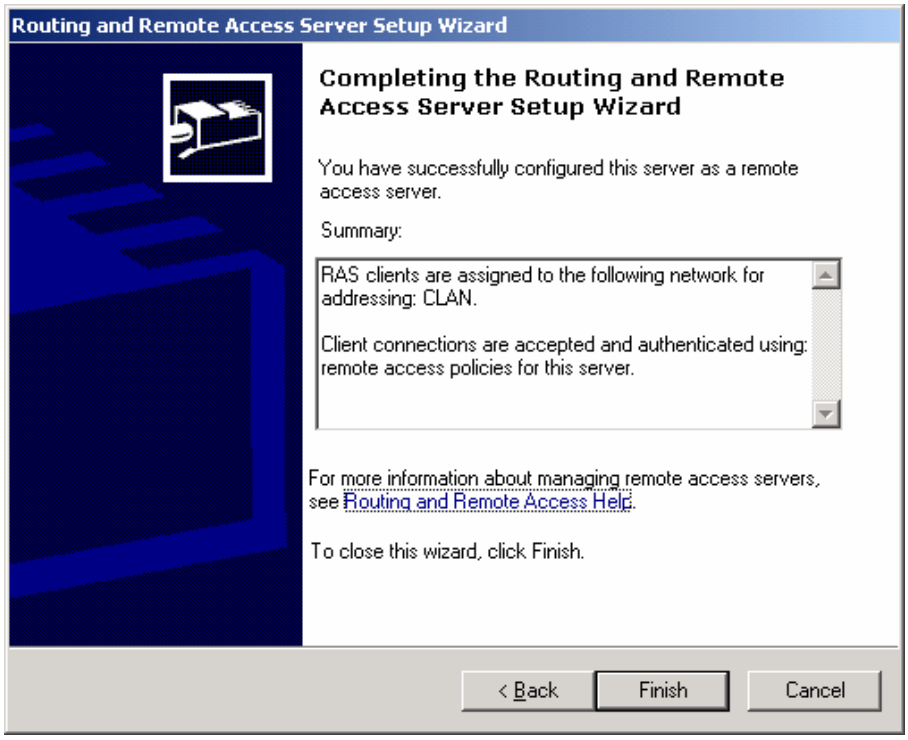
9. Select that connection requests should be authenticated locally (do not use a RADIUS server, and click **Next.**



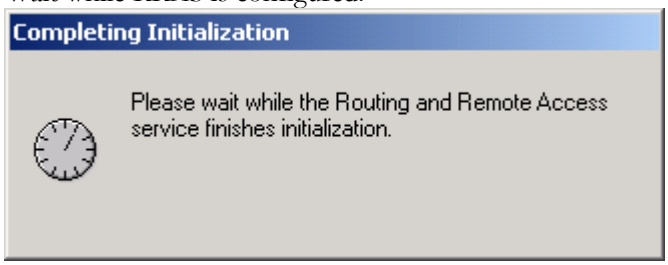
10. Click **OK** to continue.



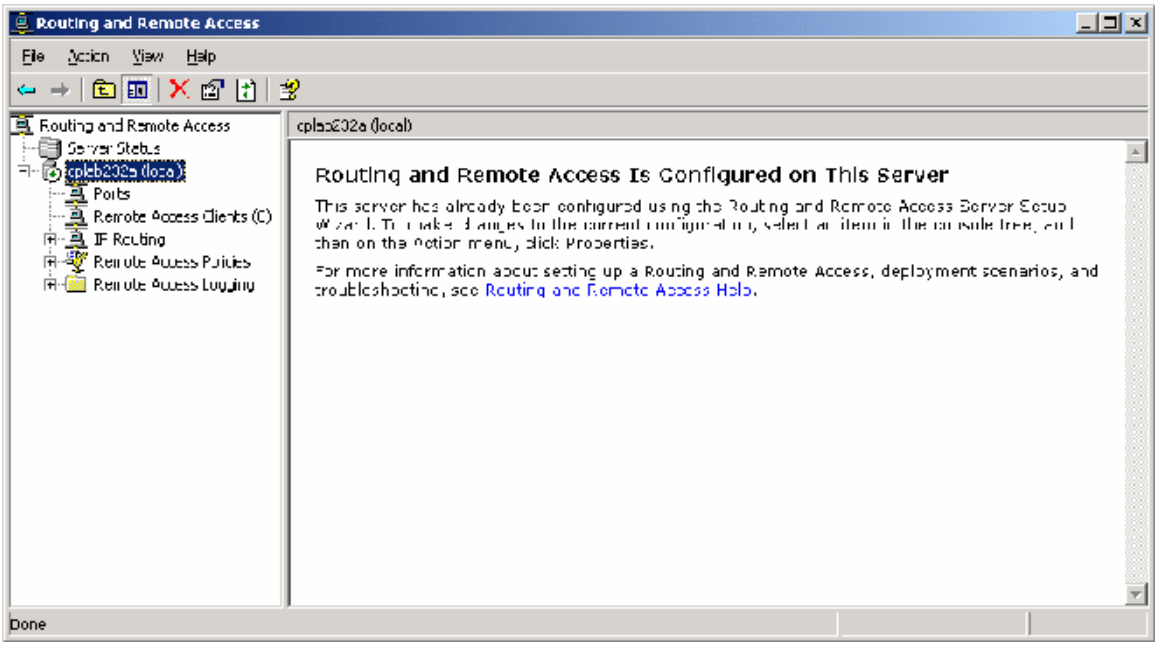
11. Click on **Finish** to apply the configuration.



12. Wait while RRAS is configured.

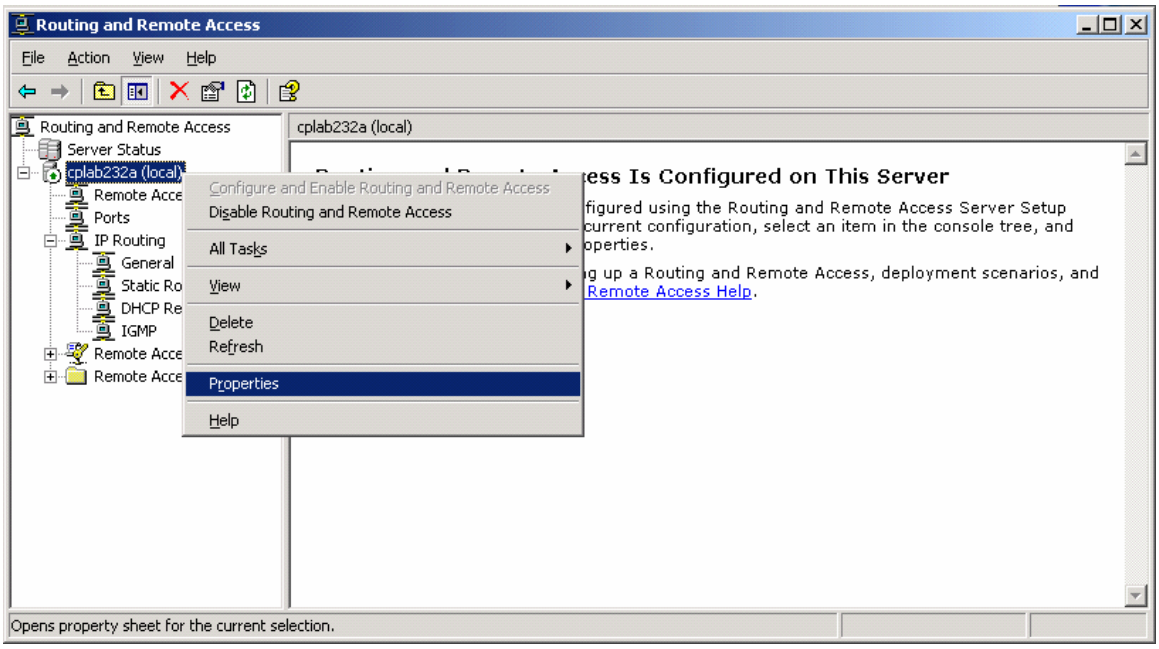


13. Once the configuration is complete the RRAS manager will be updated to reflect the changes that have been made.

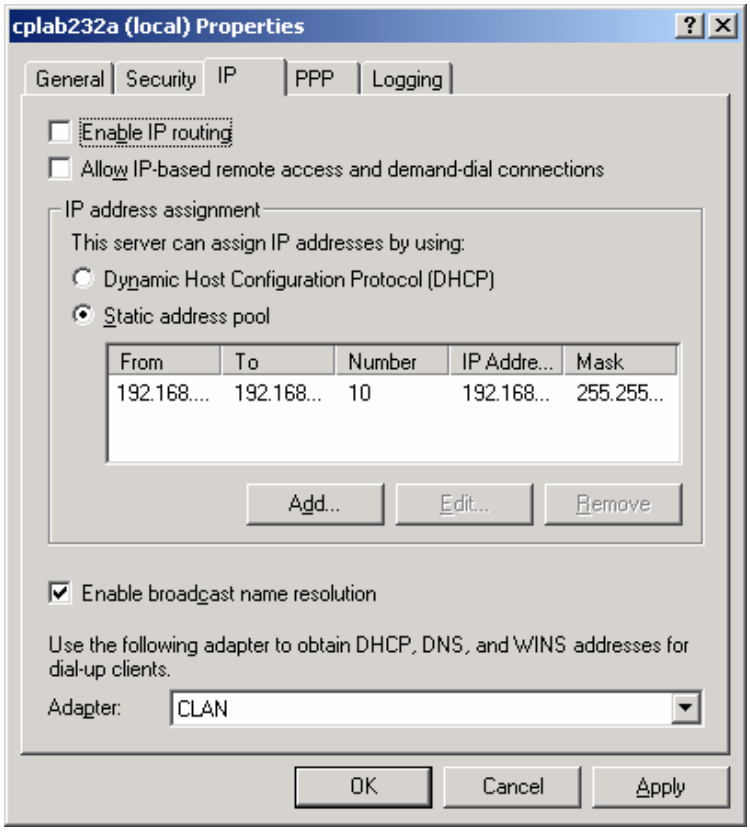


Update RRAS configuration:

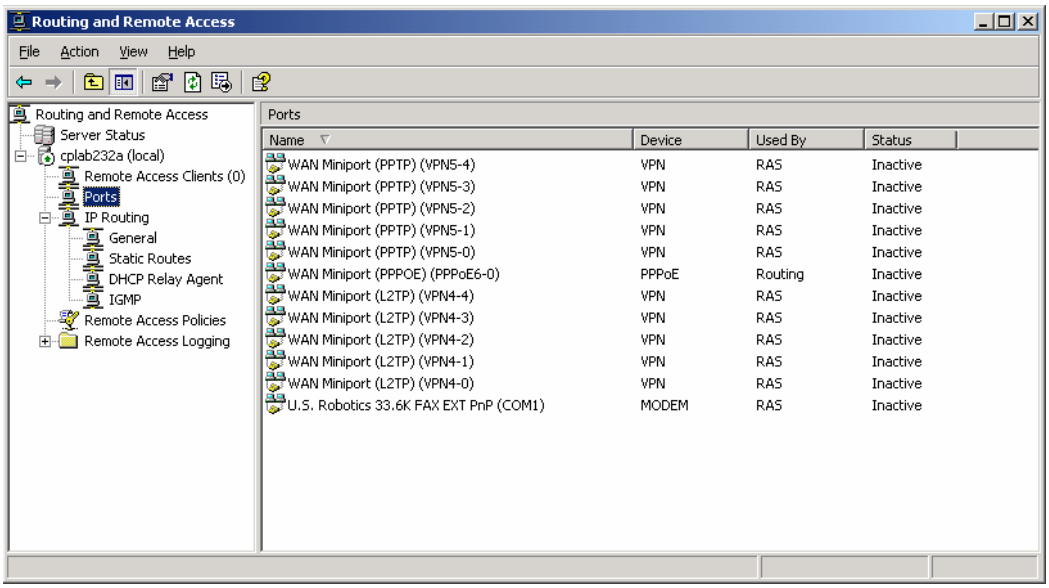
14. Select the server, right click and select properties.



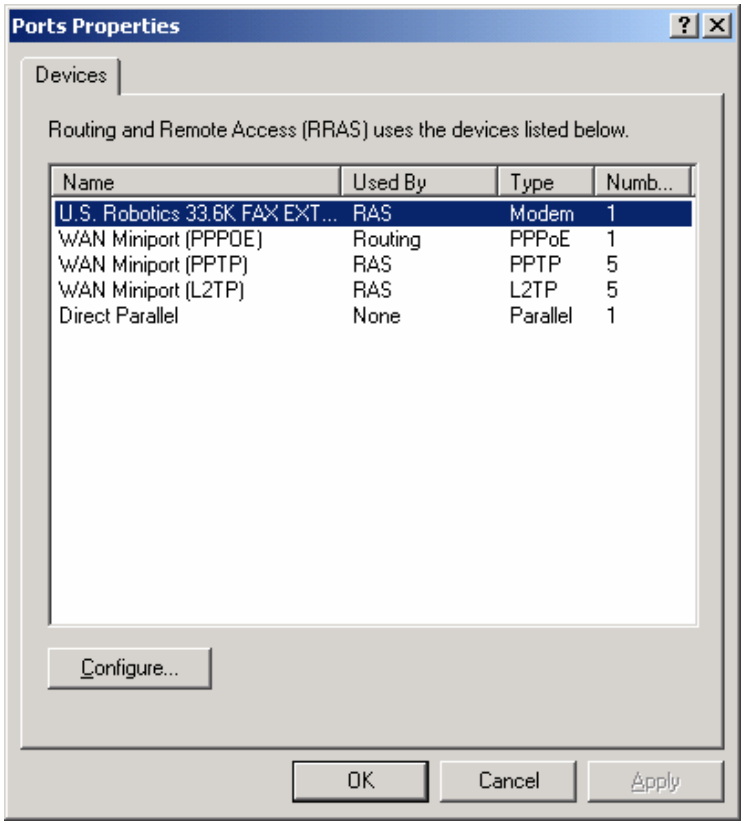
15. Change to the IP tab, de-select the "Enable IP routing" and "Allow IP-based remote access and demand-dial connections", and then click on **OK** to close the dialog.



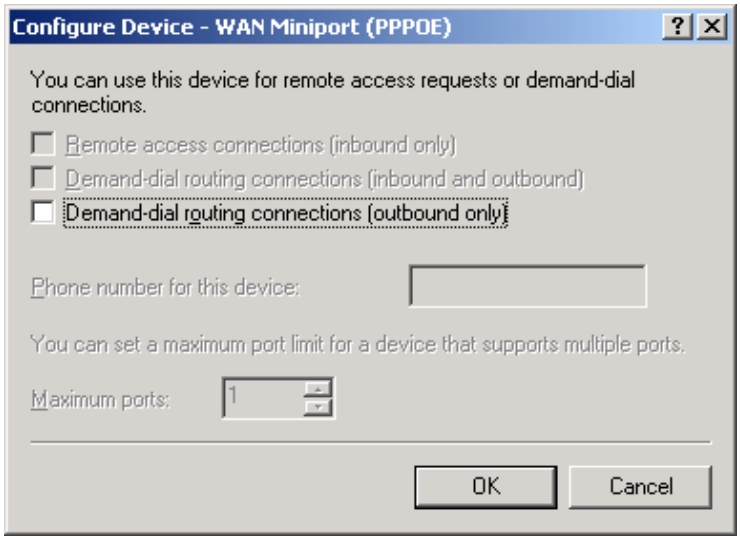
16. Select the Ports item, right click and select properties from the drop down menu.



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

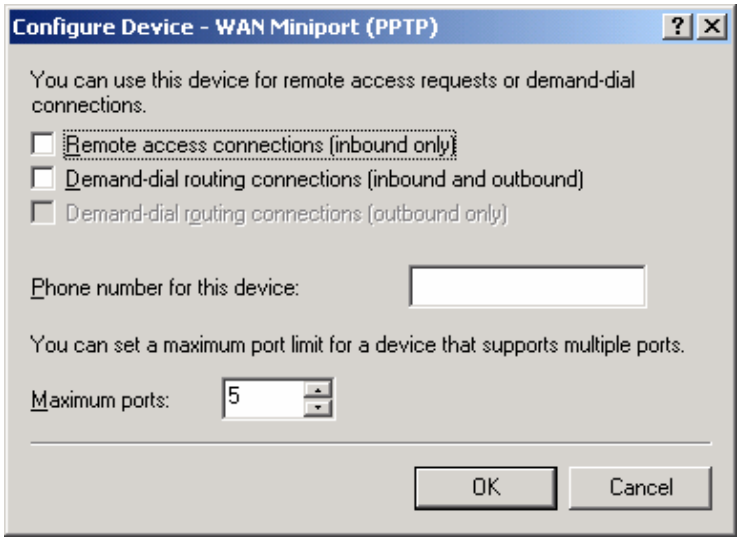


18. Deselect the demand-dial routing connections option is disabled and click **OK**.



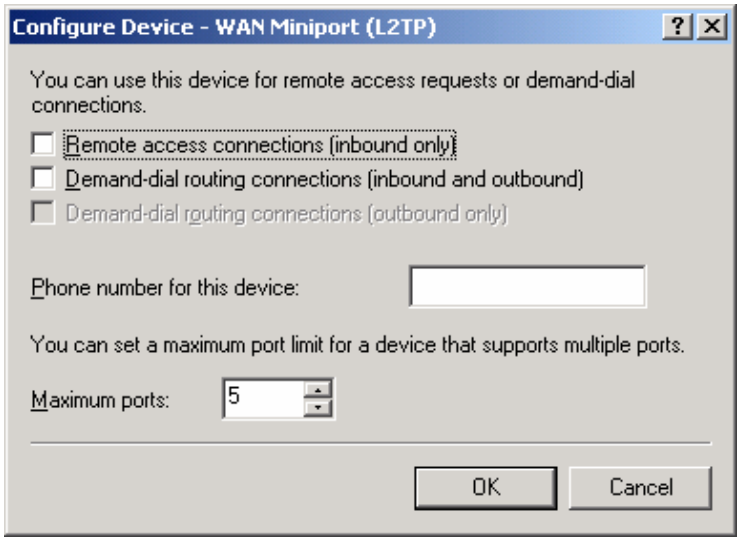
19. Select the WAN Miniport (PPTP) option and click configure.

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

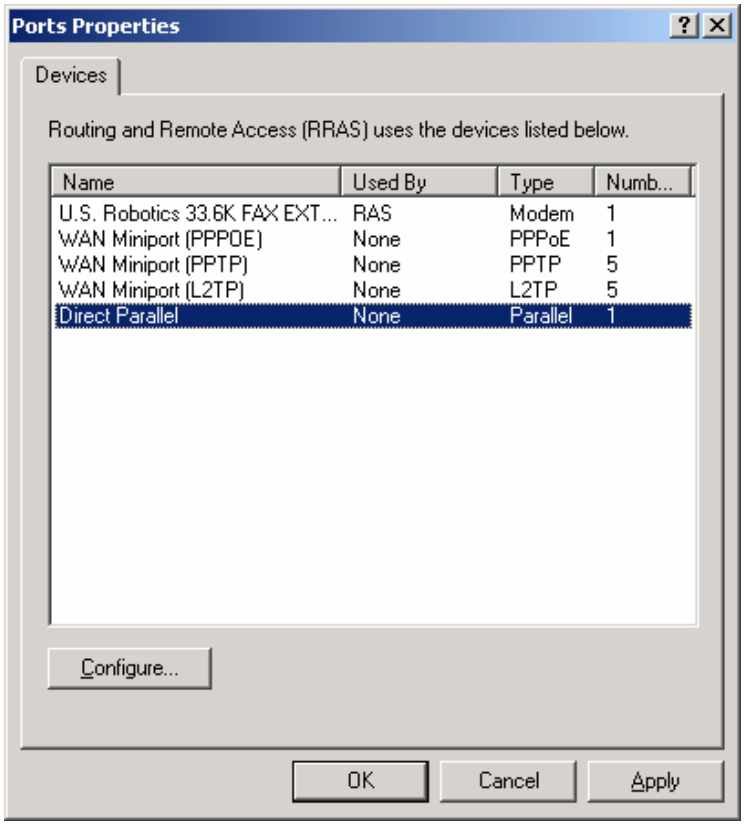


21. Select the WAN Miniport (L2TP) option and click **Configure**.

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



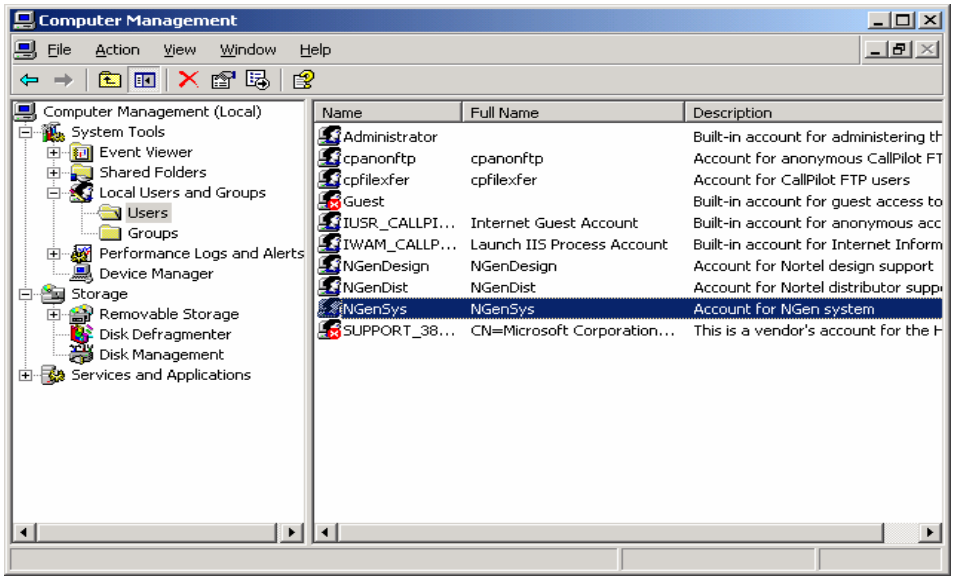
23. Once all of the changes are complete only the external modem should show that is in use. Click on **OK** to exit the ports properties page.



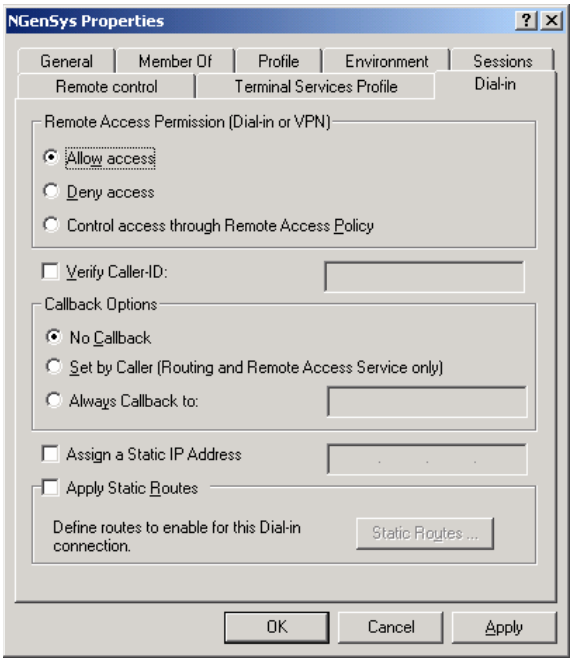
24. Exit the RRAS configuration manager.

Configure Users for RRAS:

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



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



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

Appendix C: Updating the 201i BIOS

CallPilot 201i IPE servers running release 3.0 (03.03.06.02) require BIOS version (6.0.3) to properly utilize the Windows 2003 Server Operating System. By default, all systems shipped after GA automatically include this BIOS version.

For some maintenance activities, the BIOS should be upgraded before installing CallPilot 3.0 (03.03.06.02) and Windows 2003 Server OS from a CallPilot Image CD.

Note: The semi-automatic update process includes steps that repartition and format your hard drive. This will result in the loss of all data on the hard-drive. If only the BIOS update is desired, use the manual process below.

Note: If after completing either the manual or semi-automatic process, the system pops up a Windows Activation window, manually enter the product key information from the Certificate of Authenticity (COA) that was shipped with the system/software and reboot the server. If no COA was received, contact Order Management for a replacement.

Manual process to update the 201i BIOS:

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

Semi-automatic process to update the 201i BIOS:

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

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

1. Re-do BIOS update
2. Reboot

Appendix D: Updating the 1002rp BIOS

CallPilot 1002rp Rackmount servers running release 3.0 (03.03.06.02) require BIOS version (NNCXUA07) to properly utilize the Windows 2003 Server Operating System. By default, all systems shipped after GA automatically include this BIOS version.

For some maintenance activities, the BIOS should be upgraded before installing CallPilot 3.0 (03.03.06.02) and Windows 2003 Server OS from a CallPilot Image CD.

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

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

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

Appendix E: Updating the Mega-RAID Firmware

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

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

Appendix F: Using Microsoft RDC

This appendix is an excerpt from Product Bulletin P-2005-0026-Global "CallPilot 3.0 and the 201i IPE Platform – Using Microsoft Remote Desktop Connection". It is included here as technical reference providing information needed for personnel to acquire, install, and use the RDC client to access CallPilot 3.0 systems. For complete details, refer to the Product Bulletin.

Please read this section in its entirety since several important issues and workarounds are described. If not followed, the user will likely encounter the following conditions:

- Errors connecting
- Problems entering passwords
- Confusion on how to share the screen
- Support tools will not work properly
- PEP installs will not work properly
- MAS Trace window will not be visible

The following topics are covered in this section:

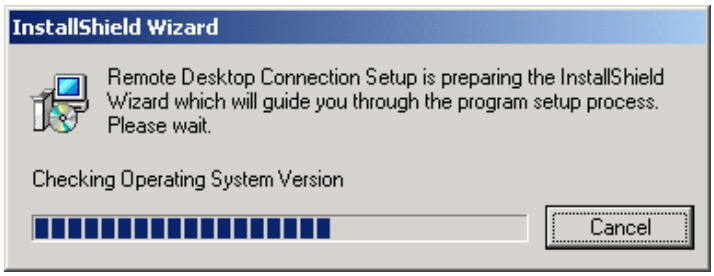
1. Remote Desktop Connection Client Installation

The Remote Desktop Client software is installed by default on Windows XP Professional and on Windows Server 2003. However, the version for Windows Server 2003 is slightly different from the Windows XP version. Obtain the Windows Server 2003 version of the Remote Desktop Connection Client from the following link:

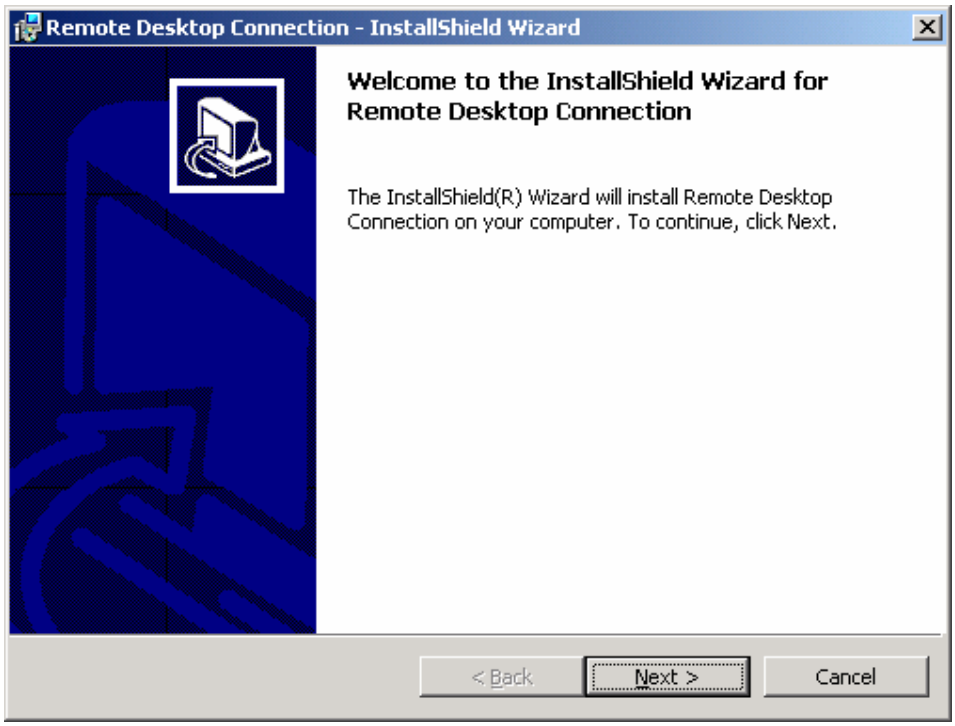
http://www.microsoft.com/downloads

This software can be installed on client PCs running Windows 95, Windows 98, Windows ME, Windows NT 4, Windows 2000, or Windows XP using the following procedure:

1.1. Run the executable (msrdpcli.exe). InstallShield will scan the computer to prepare installing the client.

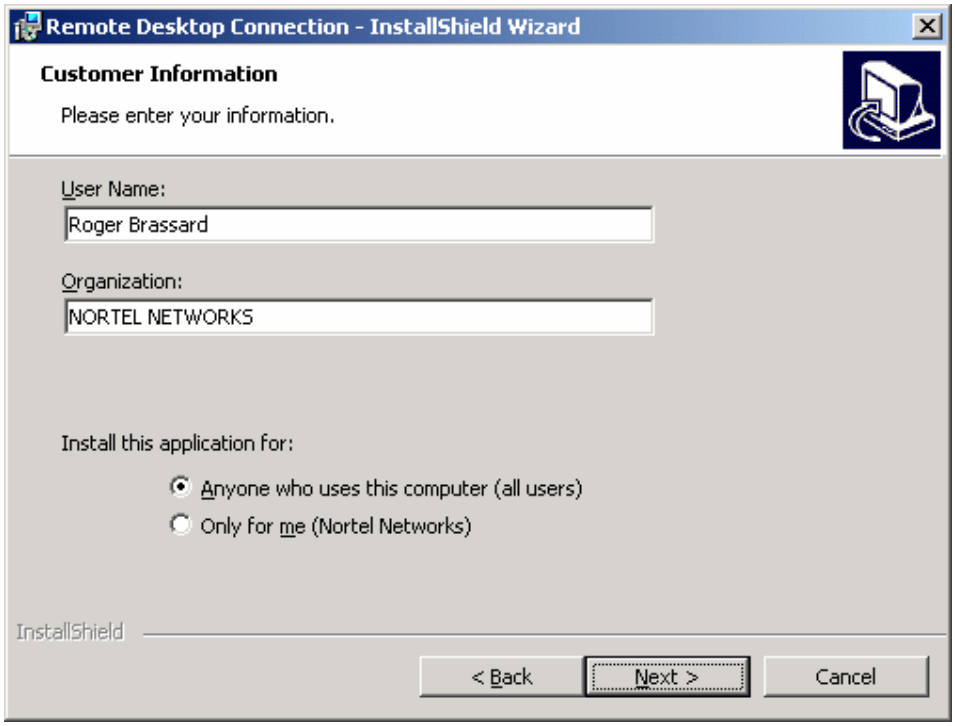


1.2. Once complete, the "Welcome" window will appear:

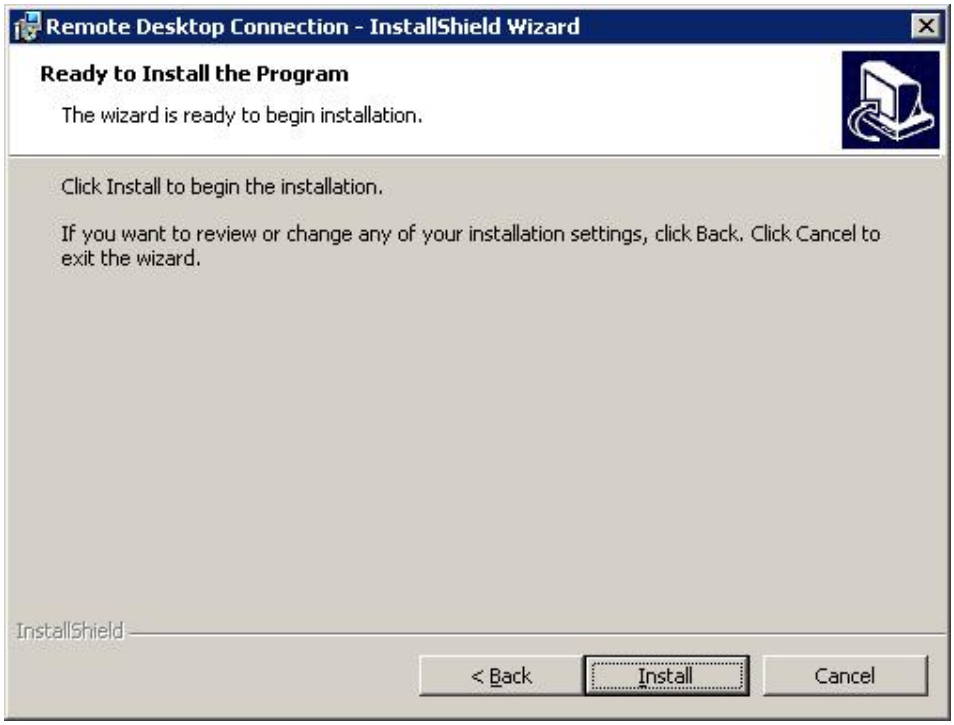


1.3. Click "**Next >**" to proceed. The End User License Agreement window will appear:

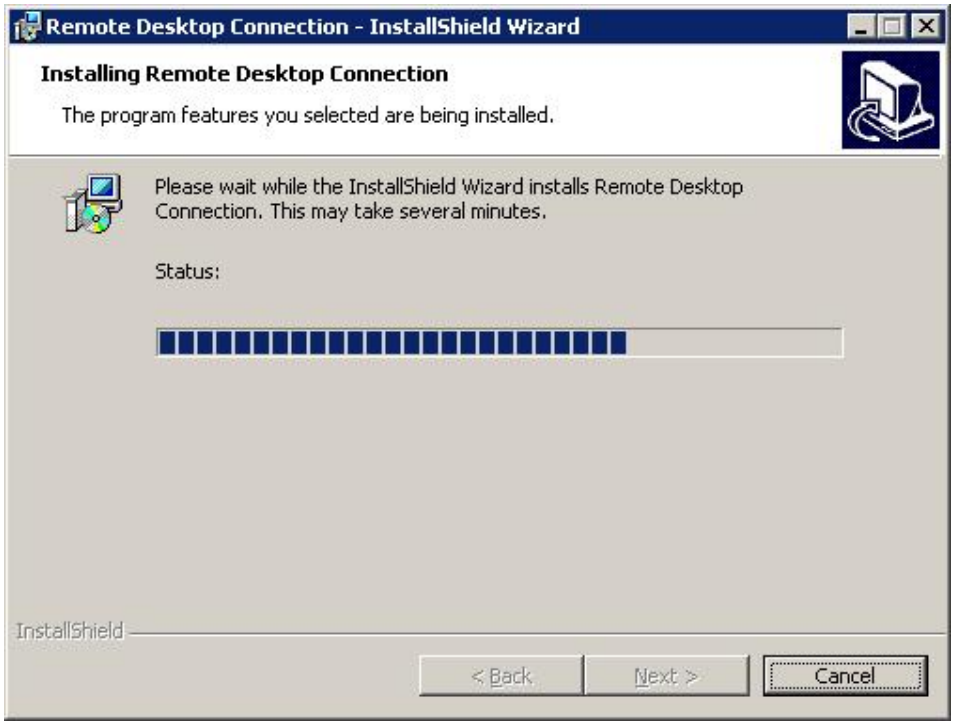
1.4. Accept the License agreement, click "**Next >**".



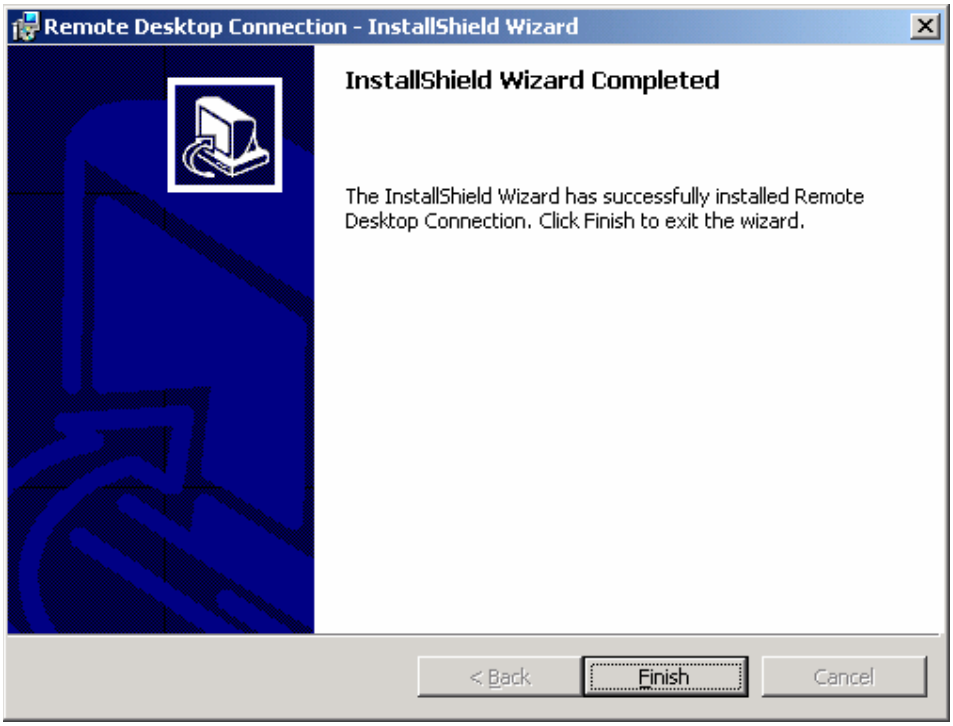
1.5. Enter the appropriate User/Organization information and click "**Next >**" to continue.



1.6. Click "**Install**" to install the client.



1.7. Once all software has been installed, “Completed” window will appear.



1.8. Click “**Finish**” to close the wizard window.

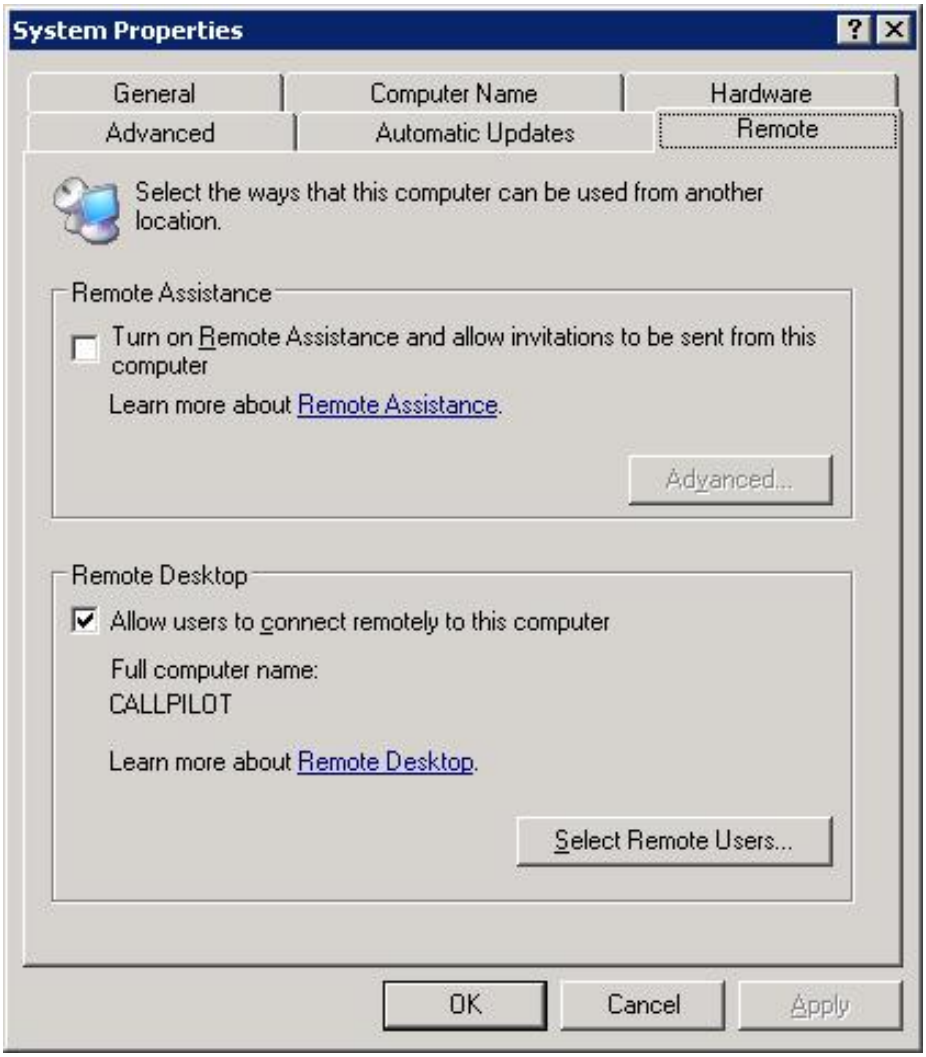
2. Enable Remote Desktop feature and Set policy on host

All CallPilot 3.0 and later servers come with the Remote Desktop server enabled and configured for use by default.

THERE IS USUALLY NO NEED TO PERFORM THE STEPS SHOWN IN THIS SECTION.

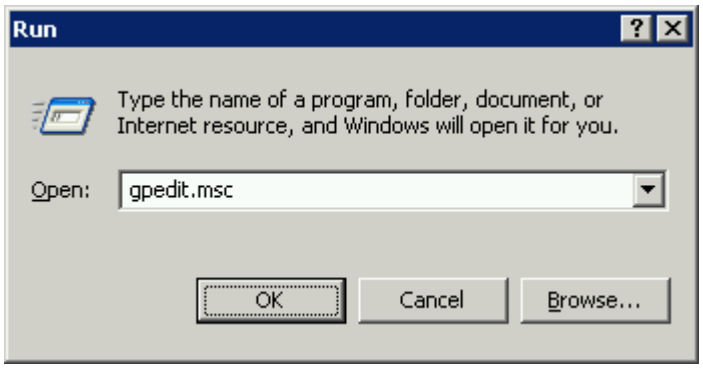
If necessary, Remote Desktop access can be enabled or disabled as follows.

2.1. From the CallPilot server desktop, right-click on **My Computer** and choose **Properties**, then click on the **Remote tab**.

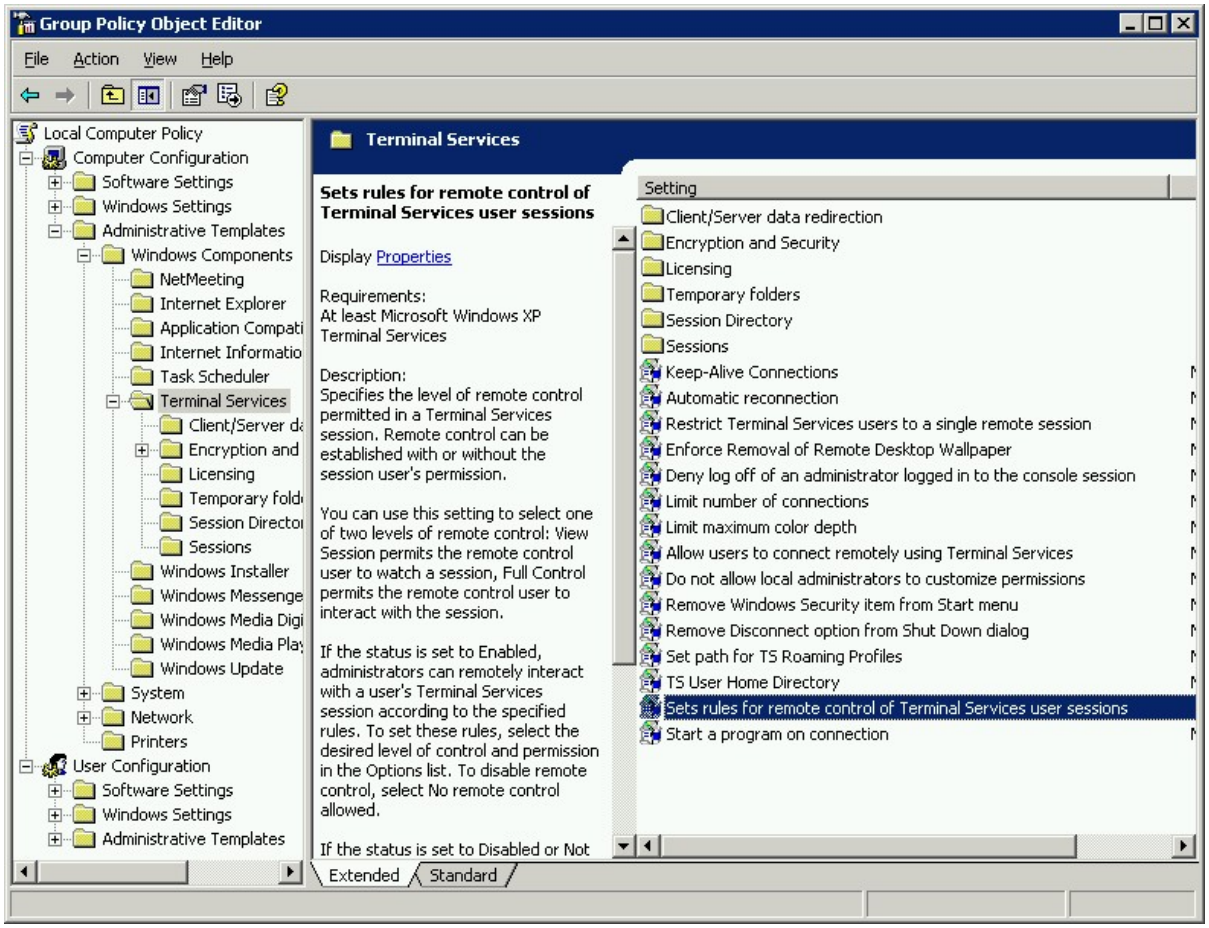


2.2. Ensure the "Allow users to connect remotely to this computer" checkbox is selected. Click "**OK**" to close this window.

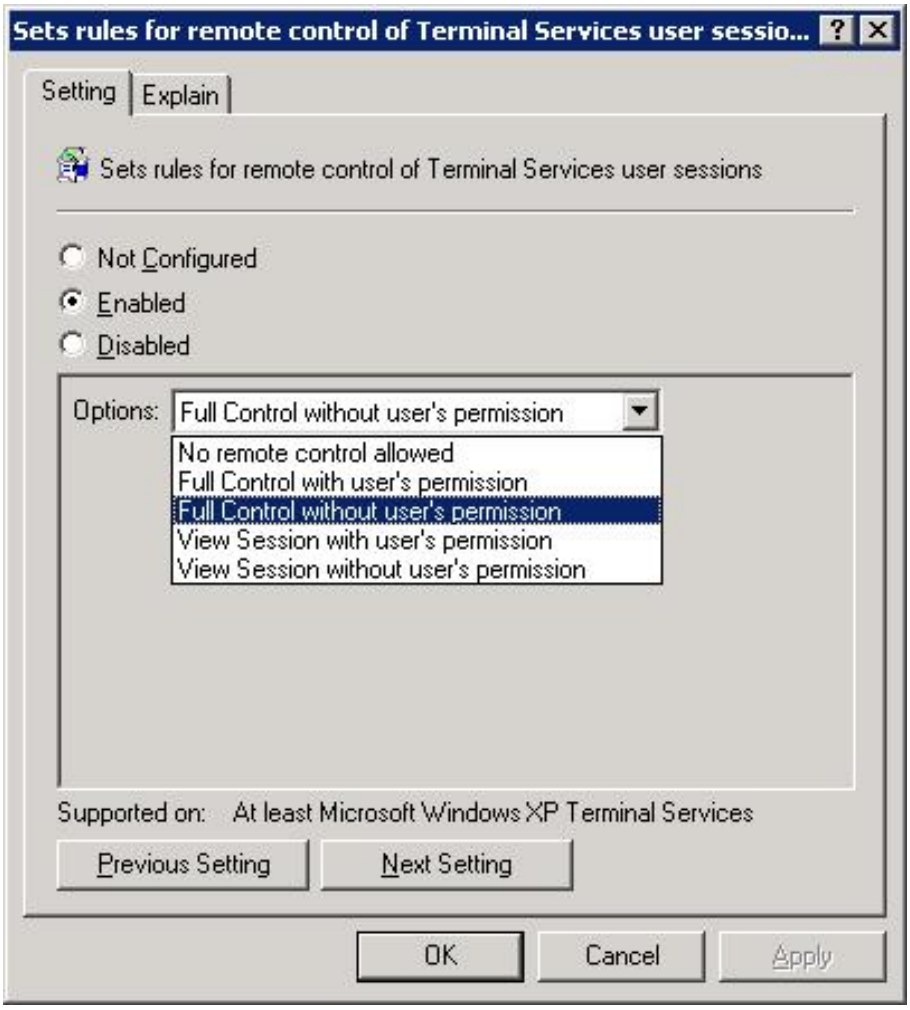
2.3. There are five (5) options available for remote control settings. To choose among options, you need the Group Policy Snap-in. Open a command prompt window by clicking Start > Run. In the "Open" window type "**gpedit.msc**" and click "**OK**" or press **<Enter>**.



2.4. On left side of window, expand **Computer Configuration**, expand **Administrative Templates**, expand **Windows Components**, and then select **Terminal Services**.



2.5. On right side of the window, double-click on "**Sets rules for remote control terminal services user sessions**". Select "**Enabled**" and five (5) options are available:



2.6. Adjust the set settings as required and click "**OK**" to close the window.

The default and recommended setting for CallPilot is "**Enabled" with Option "Full Control without User's permission**" selected. This allows for RDC sessions without requiring interaction/consent from a local console user.

2.7. Use **File** > **Exit** to close the "Group Policy Object Editor" window.

3. Establish a RAS connection

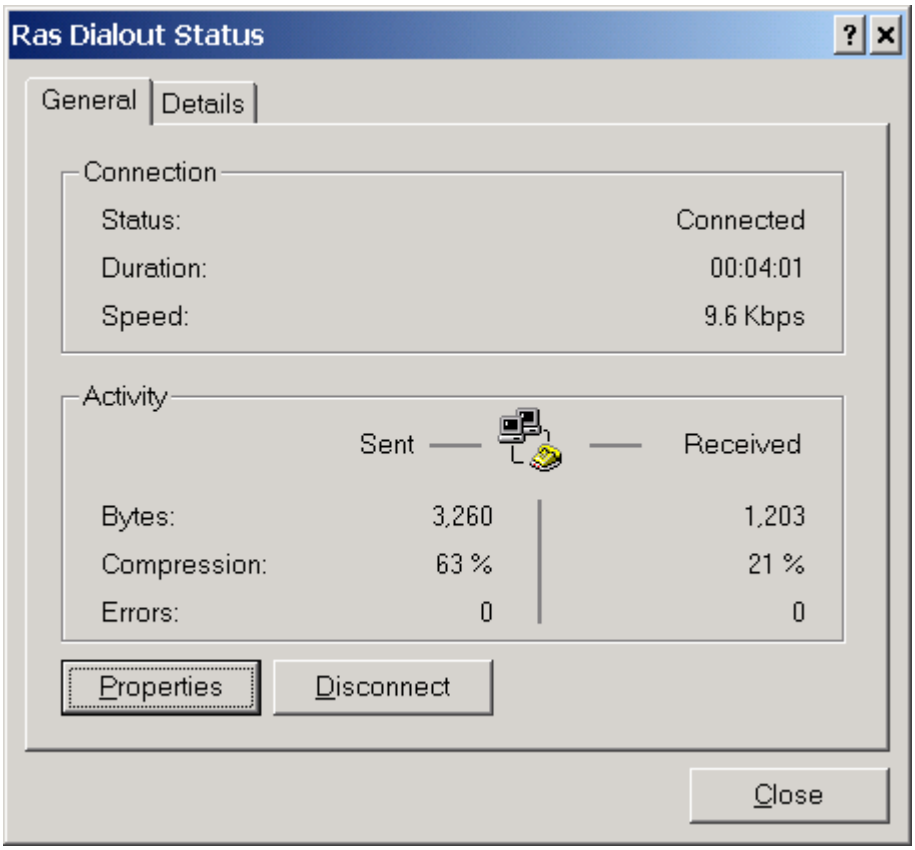
If the CallPilot server is not directly accessible from the Client PC via an intranet or VPN, it will be necessary to establish a Remote Access Service (RAS) connection. This is unchanged from previous CallPilot releases – using Dial-up Networking from the Client Windows PC.

Note: The details of using Dial-up Networking vary depending on which version of Windows Operating System is running on the Client PC. Refer to the CallPilot NTPs, Windows Help, or other Microsoft documentation for details.

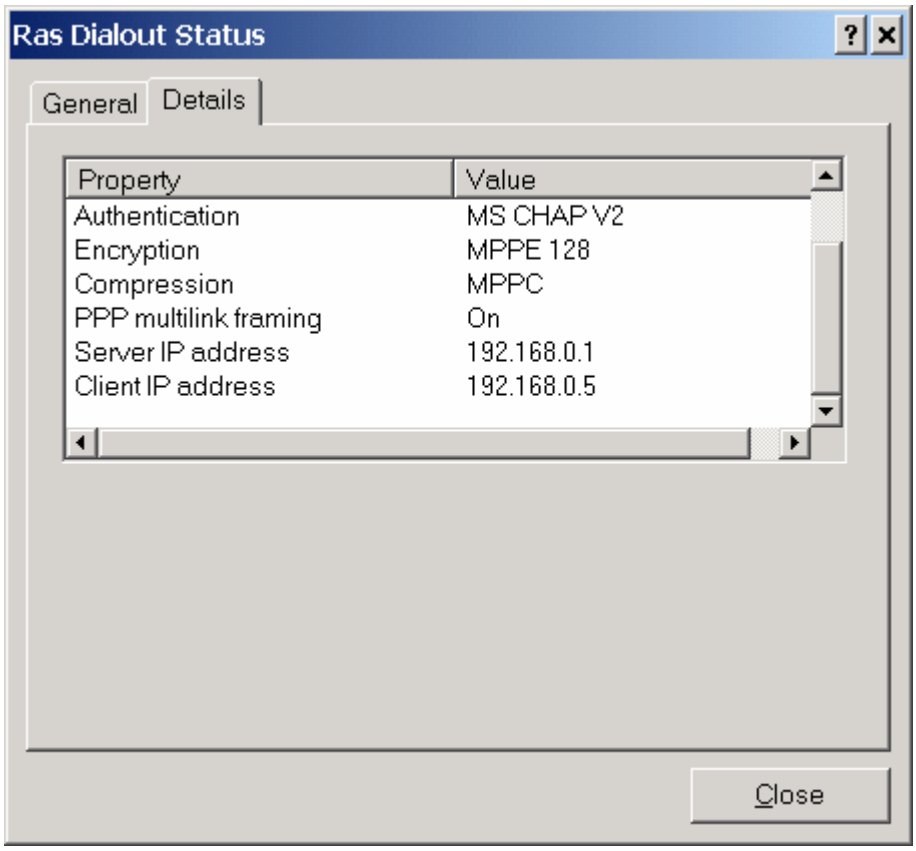
The following example is from a client PC running Microsoft Windows 2000 Professional.

Connect to the CallPilot server using Dial-Up Networking. Use the NGenDist or NGenSys accounts since these accounts are enabled for dial-up access. You will need the password for the account.

3.1. Right-click the connection icon in the system tray and choose **Status** (or just double-click the icon). The RAS "Status" window appears.



3.2. To obtain the IP address, select the "**Details**" tab.



3.3. From the "Details" tab, note the Server IP address. (192.168.0.1 in this example).

3.4. Close the Dial-Up Networking Status window by clicking "**Close**".

4. Starting the Remote Desktop Client

4.1. Method 1: Private Session (preferred method)

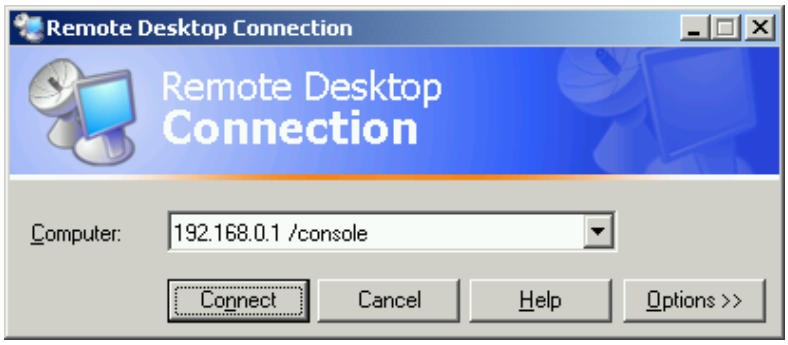
Use this method when needing to perform the following tasks:

- Establish a private login session remotely, not visible from the server console.
- Utilize the CallPilot Support Tools
- Transfer files from local PC to the CallPilot server
- Install a PEP/Service Update that interacts with the CallPilot database

Note: If the local console is already logged in, it will get forcibly logged out (unsaved data will be lost). Your actions will not be visible on the local console.

1. From the client PC, start the Remote Desktop Connection for Windows Server 2003 Client. The usual shortcuts are:

   - Start > Programs > Remote Desktop Connection
   - Start > Programs > Accessories > Communications > Remote Desktop Connection



Note: When using the "/console" suffix, this assures a private session connected to the logical console of the CallPilot server.

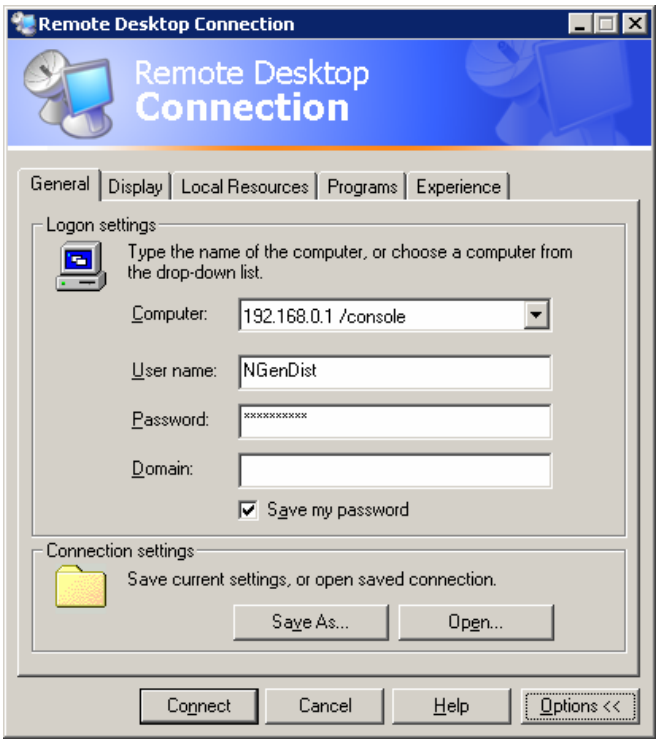
Note: A space character exists between the last digit of the IP address (or computer name) and the "/console".

Note: Older versions of RDC only support "/console " suffix using DOS window command line.

For a dial-up RAS connection, use the IP address for the Dial-Up server as shown in the preceding section.

For intranet or VPN connections, you may use the computer name instead of an IP address.

2. Click the "**Options >>**" button:



3. Fill in the Computer (name or IP address with a "space" character before "/console"), User name and Password. Click the "**Local Resources**" tab:

The "Local Resources" tab allows you to specify that the Disk drives and Printers from the client PC are to be made available on the target CallPilot server. Recommended settings:

- Remote Computer Sound: Leave at remote computer
- Keyboard: On the remote computer
- Local Devices: **Note**: Disk Drives must be checked to enable transferring of files (SU/PEP, logs, traces, etc) to and from the CallPilot server.

The "Display" tab allows you to specify the screen size and colors for the remote desktop connection. Recommended settings:

- Remote Desktop size: 800x600
- Color Depth: High Color (16 bit)

The "Experience" tab allows you to specify the connection speed (broadband or modem) that the connection will be optimized for. Recommended settings:

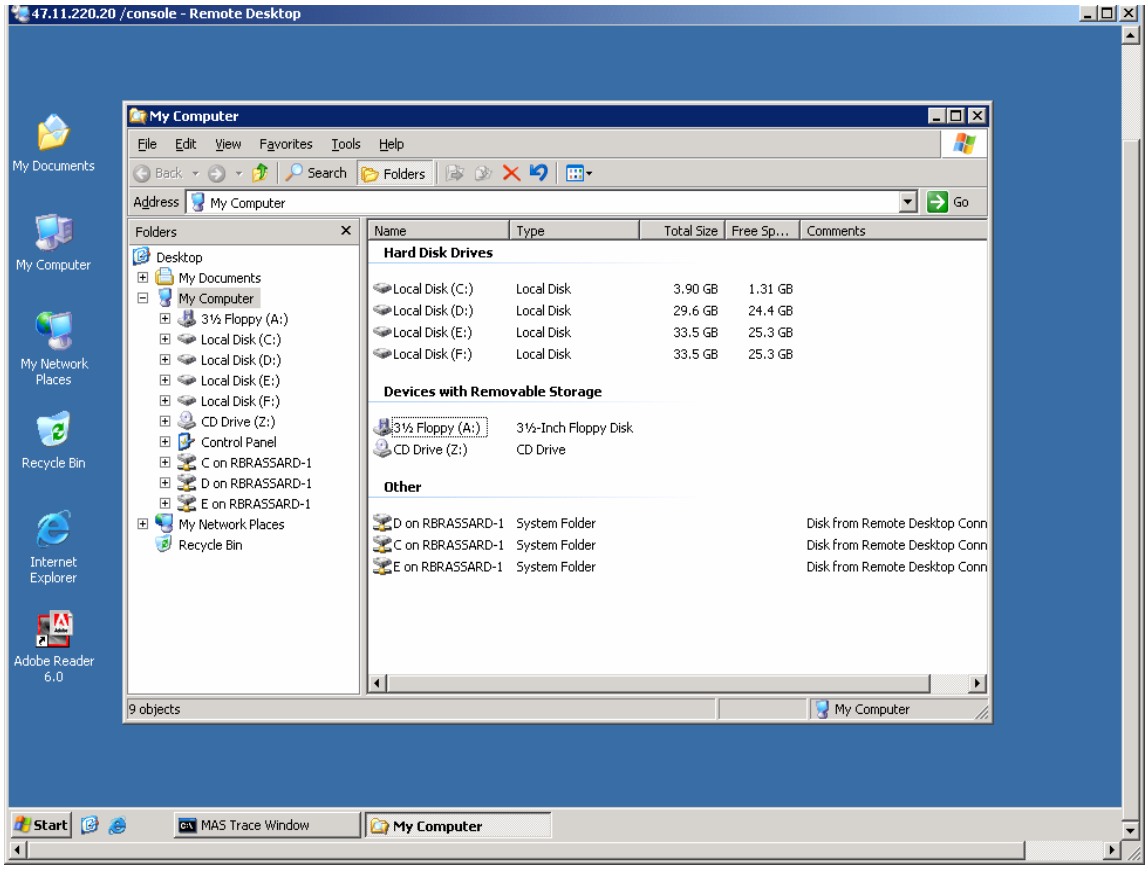
- Performance: Modem (28.8 Kbps)
- Bitmap caching: Enabled

4. Click "**Connect**" to create the remote desktop connection. The following "Security Warning" window will appear.

5. Click "**OK**" to continue

6. A remote desktop session will be started in a window on the client PC.

   Example of RDC session (with an open "My Computer" window):



You can maximize the window to make it full screen. The CallPilot "MAS Trace Window" should be visible on the taskbar. By default, this is a private session which cannot be seen from the CallPilot local console. All disk drives from the client (including floppy and CD drives) will be mapped to the CallPilot server. Files can be transferred by copying them using Windows Explorer.

If the RAS connection drops, the Remote Desktop Connection will be disconnected. You can dial back in to re-establish the RAS connection. Then reconnect using Remote Desktop Client in the same way. You will see any windows you left open.

4.2. Method 2: Shared Session (only if local console is logged on)

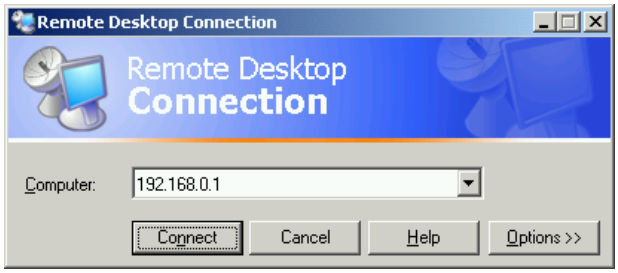
Use this method when one or more of the following conditions are true:

- Need a "shared" login session where you are able to see exactly what is on the local console and all tasks are visible from the server console. (i.e. during mentoring sessions, or investigating an existing alarm message displayed on the console, etc.)
- When no transfer of files between the local PC to the CallPilot server will occur

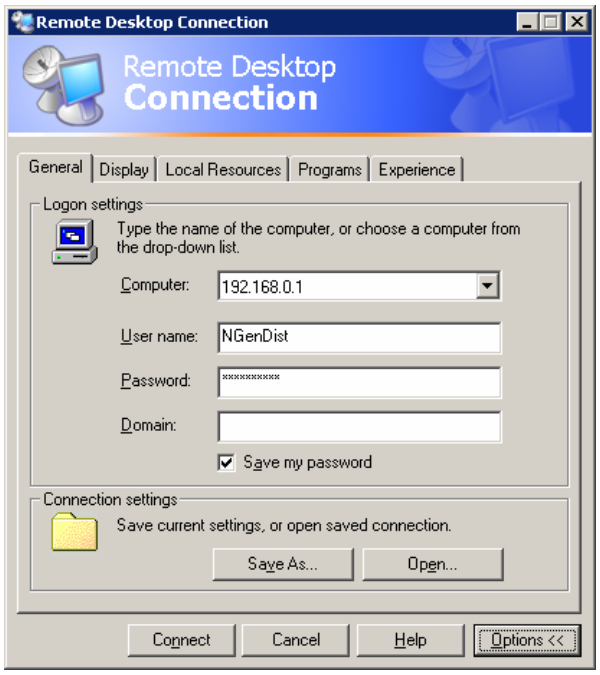
You can choose to start a shared session as follows:

1. From the client PC, start the Remote Desktop Connection for Windows Server 2003 Client. The usual shortcuts are:

   - Start > Programs > Remote Desktop Connection
   - Start > Programs > Accessories > Communications > Remote Desktop Connection



2. Click the "**Options >>**" button:



3. Fill in the Computer (name or IP address), User name and Password.

   For a dial-up RAS connection, use the IP address for the Dial-Up server as shown in the preceding section. Click the "**Local Resources**" tab:

The "Local Resources" tab allows you to specify that the Disk drives and Printers from the client PC are to be made available on the target CallPilot server. Recommended settings:

- Remote Computer Sound: Leave at remote computer
- Keyboard: On the remote computer
- Local Devices: **Note:** Disk Drives must be checked to enable transferring of files (SU/PEP, logs, traces, etc) to and from the CallPilot server.

Note: Disk drive sharing is needed to be able to transfer files to and from the CallPilot server. While file transfer is not possible in a "shared" session, it's recommended this setting still be selected.

The "Display" tab allows you to specify the screen size and colors for the remote desktop connection. Recommended settings:

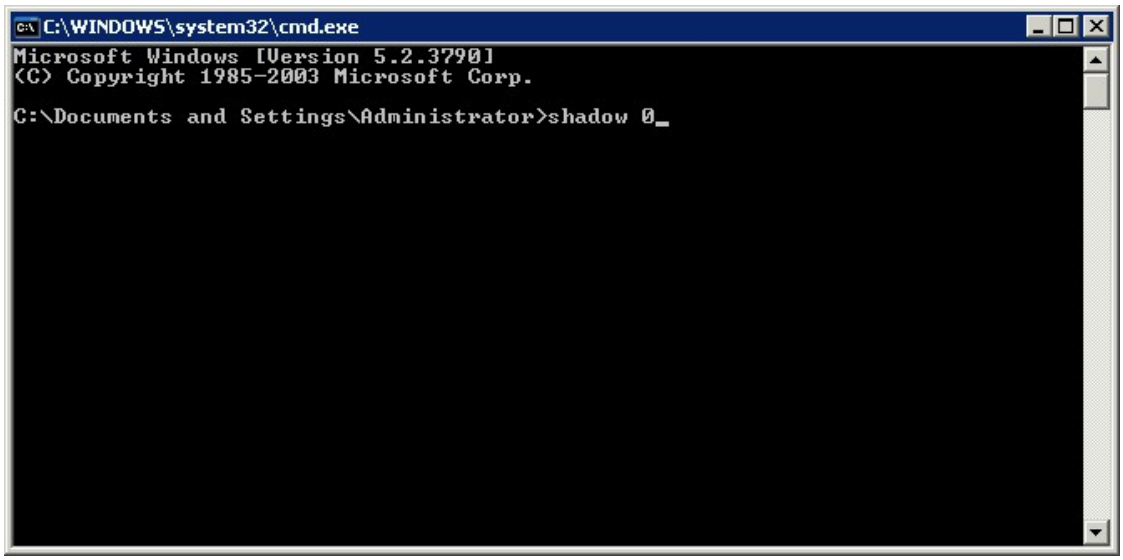
- Remote Desktop size: 800x600
- Color Depth: High Color (16 bit)

The "Experience" tab allows you to specify the connection speed (broadband or modem) that the connection will be optimized for. Recommended settings:

- Performance: Modem (28.8 Kbps)
- Bitmap caching: Enabled

4. Click "**Connect**" to create the remote desktop connection.

5. Click "**OK**" to continue.
6. Then, within the Remote Desktop session, start a command prompt and enter the command "**shadow 0**":
   - Start > Run, then in the "Open" box enter "**cmd**" and click "**OK**".
   - Within a command prompt window, type "**shadow 0**" and **<Enter>**



This will put your private session on hold and will start a shared session, allowing the local and remote consoles to share/view the same thing. All your remote actions will be visible on the local console. Both the local and remote mouse and keyboard are active. The screen resolution of the Remote Desktop Connection will be adjusted to match the resolution of the local console. The disk drives shared from the client PC are not visible after you enter the "shadow 0" command.

The CallPilot desktop background will be visible during a shared session. This can slow performance if you are connected over a modem. You can turn off the background using Control Panel > Display > Desktop tab (set it to None). Once completed with your shared session, remember to set the background back to its original setting:

Start > Settings > Control Panel > Display > Desktop tab

(browse to path: C:\windows\system32\CP3BackSplashs\ CPBAKxxxx.bmp where xxxx = platform number)

To cancel shadowing of the CallPilot console and return to the original session, hold the **CTRL** key while pressing the ***** key on the numeric keypad. The shared disk drives will again be visible. You can toggle back and forth using shadow 0 and CTRL num *.

Note: If no numeric keypad exists (e.g. using a laptop), use the Function and * keys.

Note: If you logout while in a shared session, console shadowing will end and you will revert to your initial private session. The local console session will be logged out.

Note: PEP installs and CallPilot support tools may not work properly when you are in an un-shadowed session not connected to the console.

Note: While in a "shadow 0" session, you will be unable to see your local drives on the remote server.

Note: If the local console is not already logged on when the "shadow 0" command is used, the system will return the following error within the Command prompt window:

> **Remote Control Failed. Error 7050**
> **Error [7050]:The requested session cannot be controlled remotely.**
> **This may be because the session is disconnected or does not currently have a user logged on.**

You can still connect to the console session by logging out from your RDC session, then reconnecting using the /console option (Method 1).

5. CallPilot Support Tools

Certain support tools and operations (including PEP installs) will work properly only when run from the logical console. MMFS and database operations can only be done from the logical console session. These tools must be run using either Method 1 (a private session connected to the console) or by using Method 2, after entering "shadow 0" (i.e. a shared session connected to the console). Once you cancel console shadowing, support tool operations may not work unless you re-shadow.

If you wish to use support tools without the customer being able to see on the console, use Method 1 to create a private session. This will log out any local user. Note that you can start and stop Remote Desktop sessions without dropping the RAS dial-up connection.

Note: PEP installs that perform database or MMFS operations may also require use of a session connected to the console.

Note that there is no way to send the "CTRL-ALT-DEL" key combination. If you need to reboot the CallPilot 3.0 server, use "Start - Shutdown". (Although this method of restarting caused problems with the database on earlier CallPilot software releases, it does not cause any problems on CallPilot 3.0)

To disconnect finally, you log out from the NGenDist session. This will close any programs you started and terminate the Remote Desktop Client. You can then hang up the RAS connection.

6. RAS dial-up required to establish RDC

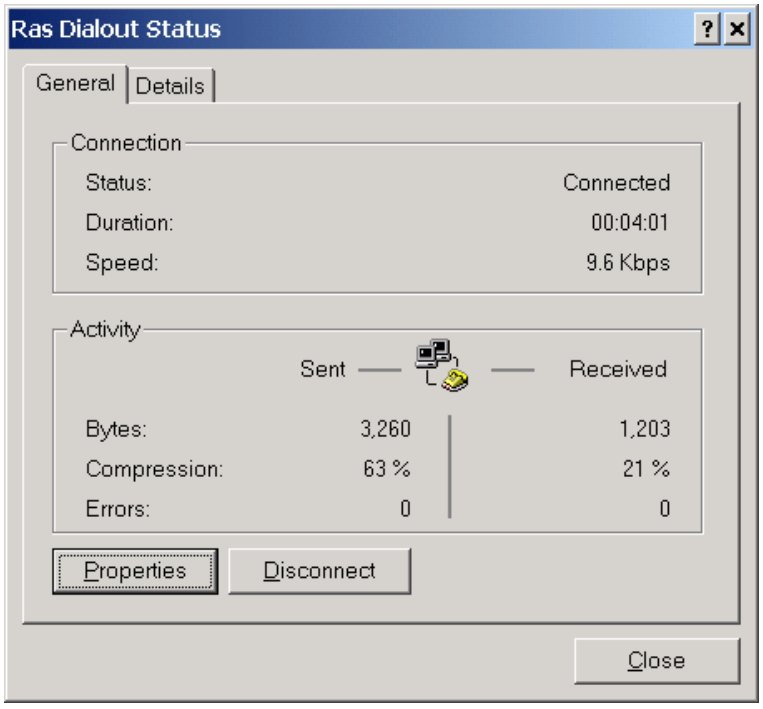
Unfortunately it is not possible to use Remote Desktop directly through a modem. RAS dial-in must be working for this form of remote access to work.

7. "Double-Hop" remote control

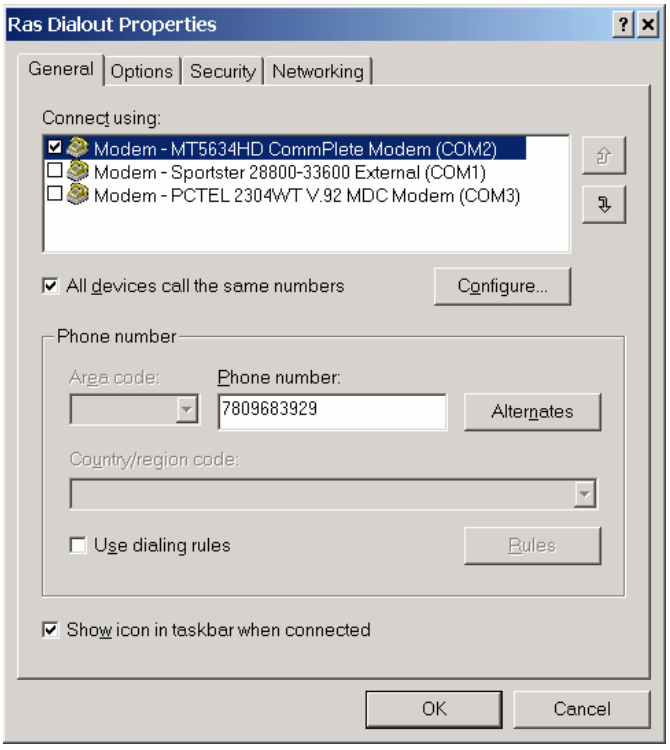
A common support scenario is for one technician to dial in to a customer's CallPilot server, then another technician controls the first technician's computer (e.g. via intranet or VPN), thereby gaining access to the dial-up remote control session on CallPilot. For this to work, the intermediate computer's Dial-Up Networking TCP/IP Settings must have the setting "Use default gateway on remote network" unchecked.

This can be modified using the following procedure:

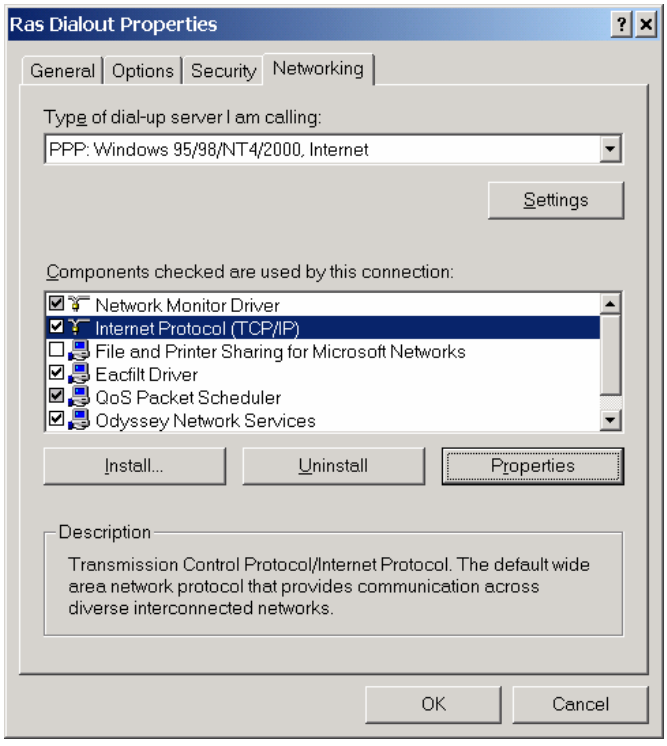
7.1. Double-click the Dial-up Networking connection icon in the system tray. The "Status" window will appear.



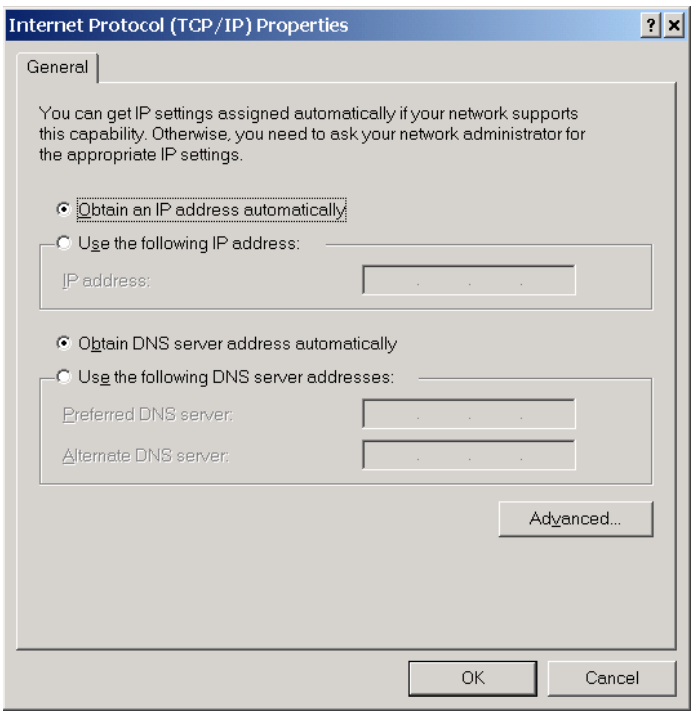
7.2. Click the "**Properties**" button. The "Properties" window will appear.



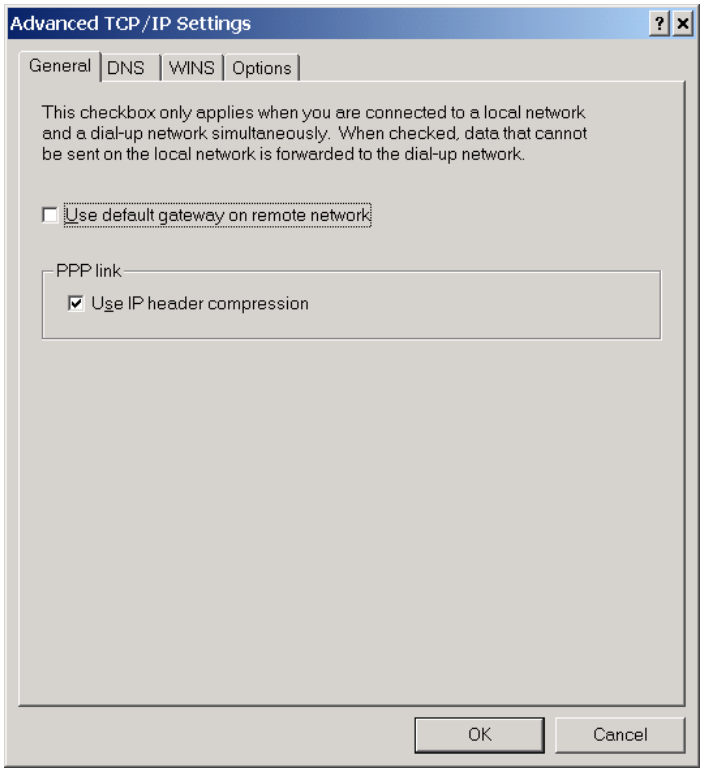
7.3. In the "Properties" window, select the **Networking** tab.



7.4. Highlight the Internet Protocol (TCP/IP) component and click the "**Properties**" button. **DO NOT** un-check "Internet Protocol (TCP/IP).



7.5. In the Internet Protocol (TCP/IP) Properties window, click the "**Advanced**" button.



7.6. In the Advanced TCP/IP settings, uncheck the setting "Use default gateway on remote network". Click "**OK**" to close all windows. The following "warning" will appear.

7.7. Disconnect and re-connect to the remote server. The modified "Default gateway" setting will now be active.

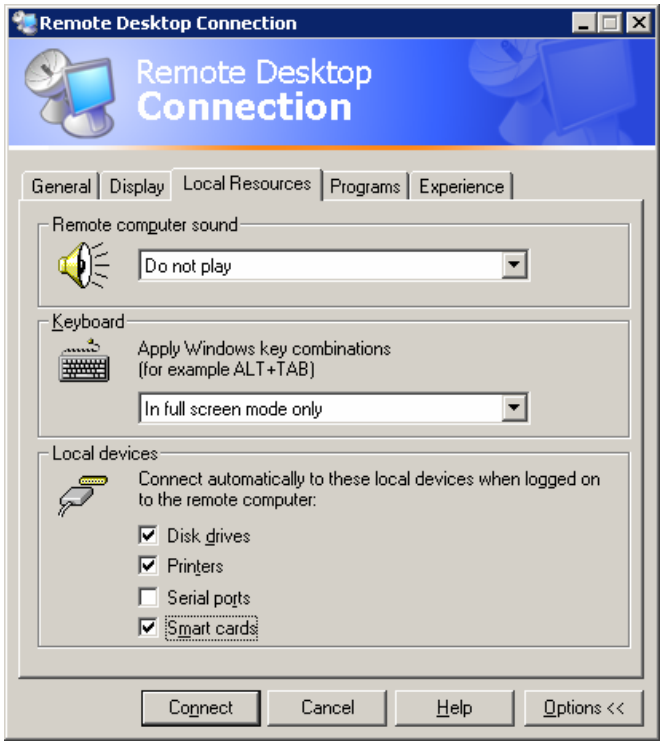
Note: It is possible to use pcAnywhere to control a PC that is in turn connected into a CallPilot server via Remote Desktop Connection. However, the right keyboard shift key does not seem to work in this scenario, nor does the CAPS LOCK key. You must use the left shift key only to input upper case characters. This is especially important when typing passwords. (This problem was noted using pcAnywhere 10.5 and 11.01).

Note: Double-Hop remote control is also possible using two Remote Desktop Connections if the intermediate PC is running an OS that includes the Remote Desktop Connections Server. This works fine, however it can be a little confusing if both sessions are in full-screen mode. Refrain from maximizing the Remote Desktop windows to see them nested.

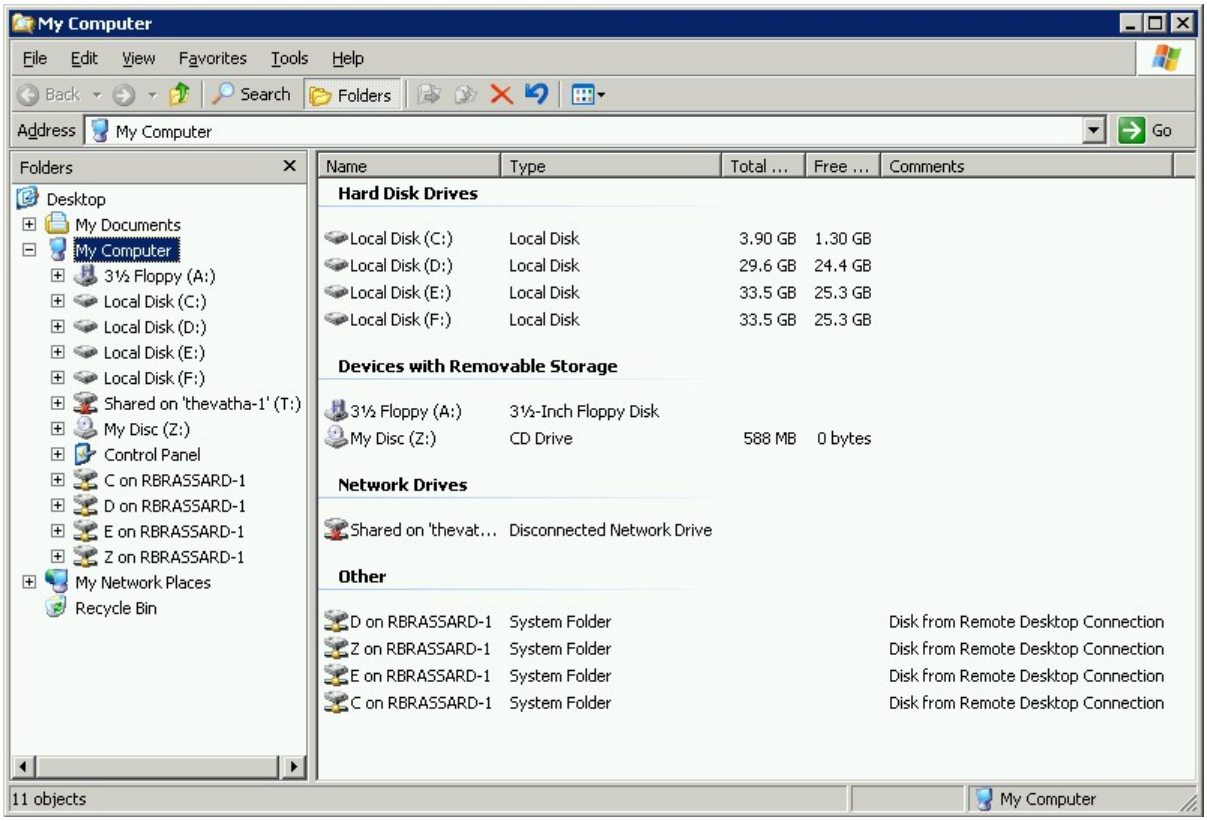
8. Transferring Files in Remote Desktop Connection Session

Before a file can be transferred between a local computer (the computer that is launching the Remote Desktop Connection and making the remote support connection session) and the remote CallPilot server, the local disk drives must be made available during the Remote Desktop Connection logon session.

As noted in sections 4.1 and 4.2, ensure the "Local devices" settings include the local "Disk Drives" to enable file transfer while in a Remote Desktop Connection session:



While in a session, moving files between the local computer and the remote CallPilot server can be done within an Explorer window. If the "Local devices" setting for Disk Drives was checked during the initial connection, the local drives will be displayed in the "Other" section as indicated in the following example:



9. Terminal Server Maximum Connections Exceeded Error

CallPilot supports a maximum of two (2) remote sessions and one (1) console session concurrently. If these limits are exceeded, when trying to start a Remote Desktop session you might receive the following error:

If this occurs, it is still possible to make a connection without the need for local intervention. Just use Method 1 as described in section 4.1 to connect. This will force any local user to logout and will allow you to connect.

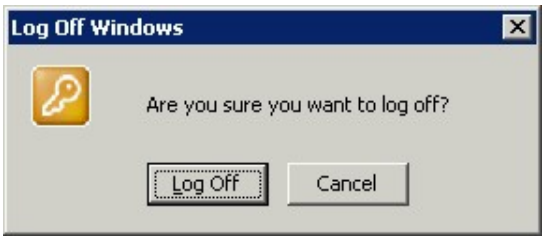
10. Disconnecting the Remote Desktop Connection Session

You should not terminate a Remote Desktop Connection by simply clicking "X" on the Remote Desktop Window. This will disconnect your session, but the session will continue to exist on the CallPilot server. Any programs you were running will continue to run. You can connect again and see the same session.

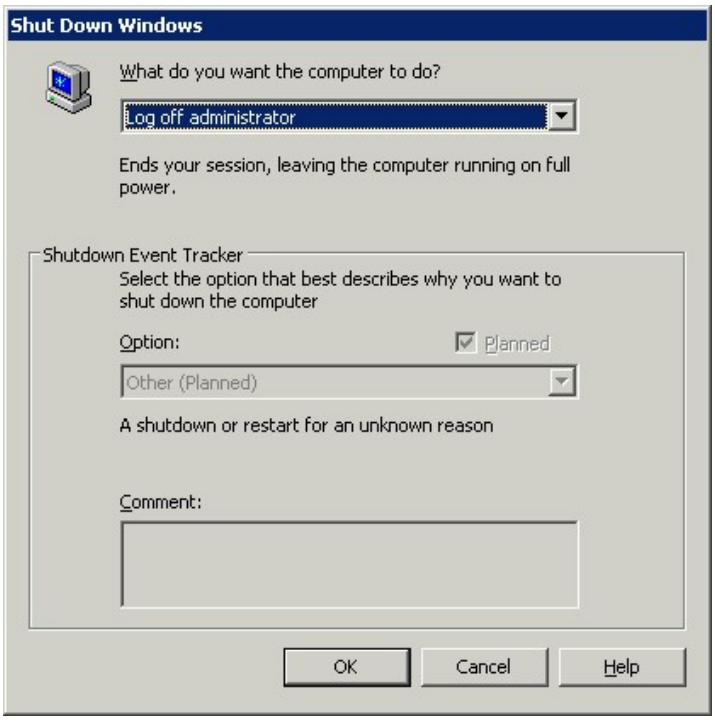
If you are finished with remote support, you should LOG OFF your session. This can be done using Start > Logoff, or Start > Shutdown >Logoff.

To log off and end the Remote Desktop Connection session:

10.1. In the Remote Desktop Connection window, click "**Start**", and then "**Log Off <username>**". The following confirmation window will appear. Click "**Log Off**" to exit the Remote Desktop Connection session.



10.2. Alternatively, in the Remote Desktop Connection window, click "**Start**", and then "**Shutdown**". When the "Shut Down Windows" dialog appears, select "**Log Off <username>**", from the "What to do" box and then click "**OK**".



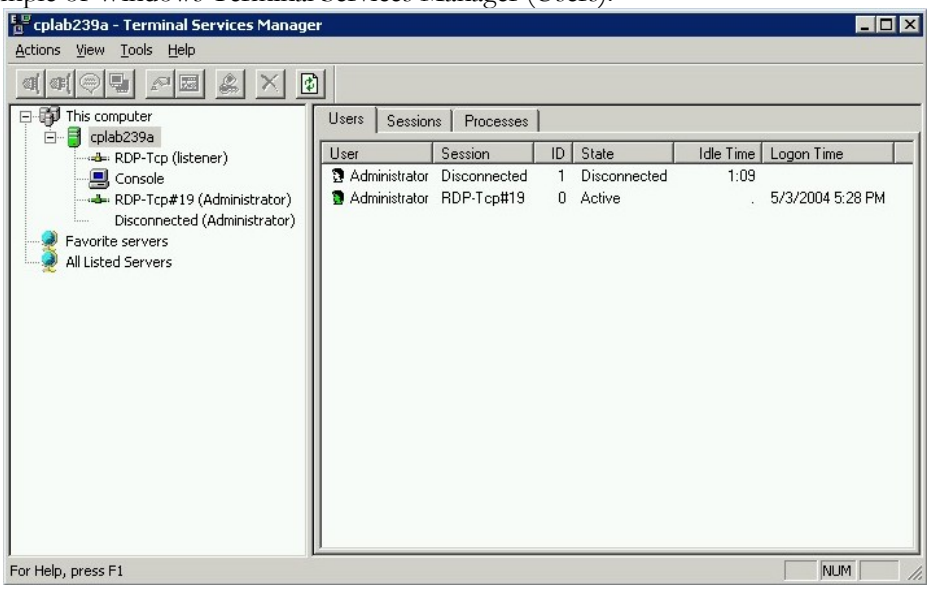
11. View/Disconnect concurrent or previous "stale" sessions

Microsoft Windows Terminal Services Manager provides the administrative user the ability to see different sessions that are active or in-active on the server.

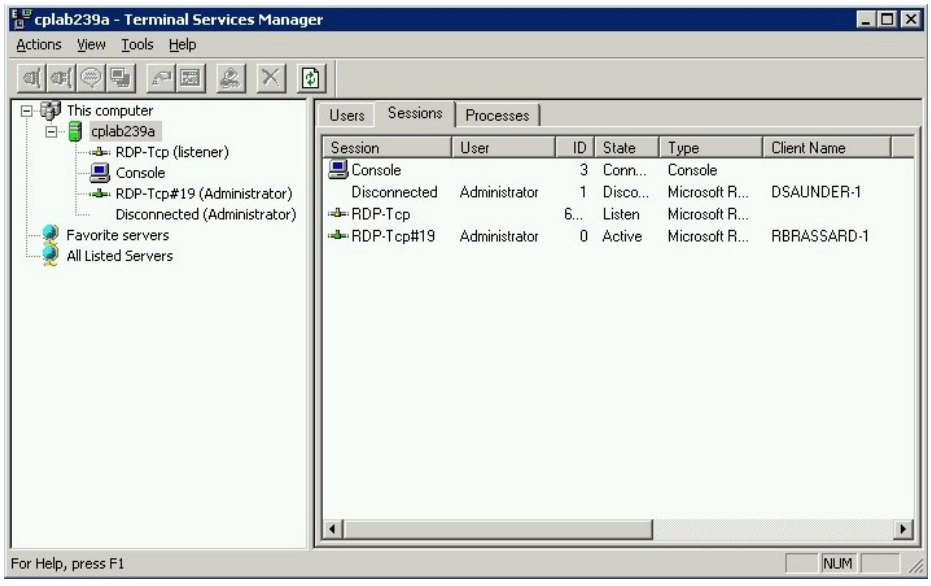
This tool can be used to logoff and/or disconnect any leftover sessions that are no longer needed. It can also be used to send messages to other sessions for messaging between users.

The tool is available using: Start > Programs > Administrative Tools > Terminal Services Manager. Similar functionality is also available from the Users tab of the Task Manager.

Example of Windows Terminal Services Manager (Users):



Example of Windows Terminal Services Manager (Sessions):



12. Troubleshooting

The following provides troubleshooting information/workarounds for scenarios that might be encountered while using Microsoft RDC.

12.1. Session disconnected unexpectedly

If while in a private console session (e.g. using "192.168.0.1 /console") another user takes away the console (either local to the server, or another remote RDC session), the following message is displayed:

Tip: Contact the site to arrange for access, or use a "shared" session (Method 2) and then message the other user via Windows Terminal Services Manager or Task Manager.

12.2. Receive "The server name specified is invalid" message when trying to connect using "/console" switch, Method 1.

If using an older version of Microsoft Remote Desktop Connection client, and enter a server name of "192.168.0.1 /console", the following message is displayed:

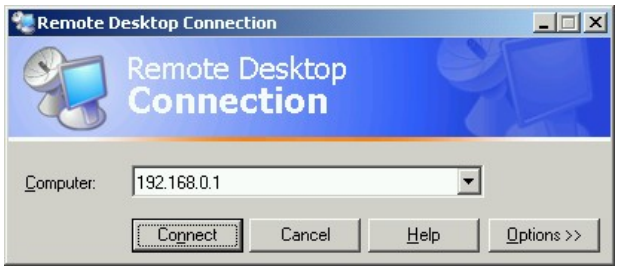
Tip: Upgrade to the newer Windows 2003 RDC client (this document references version control 5.2.3790.0). To check the RDC client version, right click the title bar, and select "**About**".

Workaround: If the RDC client can't readily be upgraded, the following alternative steps may also be used:

a. Open a command prompt window on your client PC

b. Enter "**mstsc /console**" and press **<Enter>**. The RDC window is now visible.

c. Enter the IP address of the server into the "Computer" field.



12.3. Unable to transfer files to the remote CallPilot server

If unable to see local client PC files/folders from within the RDC client session, either or both of the following conditions may apply.

Scenario #1: If the Local Devices/Disk Drives option was not checked within the Options window before connecting to the remote server, the local files/folders will not be visible from within the RDC client.

Scenario #2: If connected to the CallPilot server using a shared session ("shadow 0"), files will not be visible and therefore cannot be transferred.

Workaround: When transferring files between the CallPilot server and RDC client PC, use Method-1 "Private" session.

12.4. Connection to server is extremely slow

When using RDC, the access speed is diminished if the Desktop Background setting is turned ON.

Workaround: If using Method-1 (Private session using the "/console" switch), prior to connecting, under Options, in the "Experience" tab, ensure that "Desktop Background" in unchecked.

If using "Method-2 (Shared session using "shadow 0" command), after connecting, and logging onto the server, right-click on the **Desktop**, select **Properties**, then select the **Desktop** tab. In the Background selection box, choose "**None**".
Click "**OK**" to close the window.

12.5. "Shadow 0" session fails with error "Remote Control Failed. Error 7050"

If the local console is not already logged on when the "shadow 0" command is used, the system will return the following error within the Command prompt window:

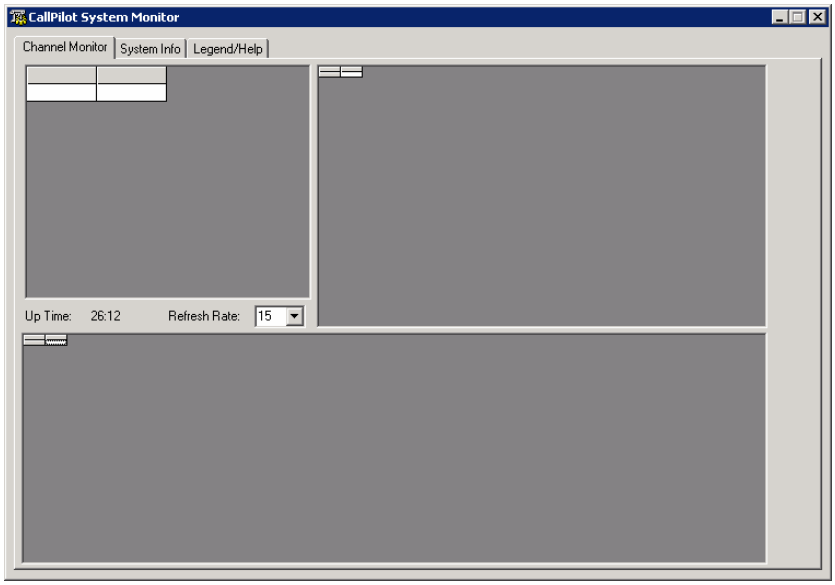
Remote Control Failed. Error 7050
Error [7050]:The requested session cannot be controlled remotely.
This may be because the session is disconnected or does not currently have a user logged on.

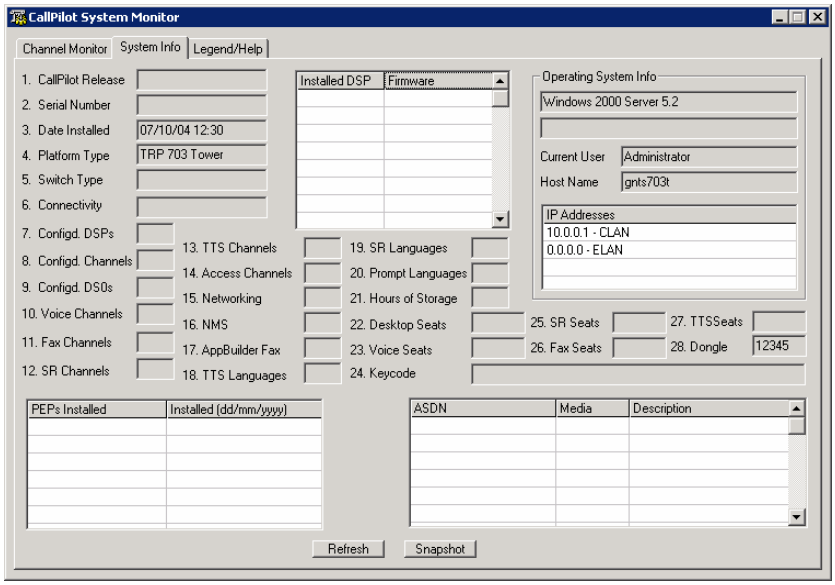
Workaround: Connect to the console session using the "/console option" (Method 1). This method does not require a user be logged on already.

12.6. System Monitor and/or Support Tools do not return valid/legible information.

If you connect to the CallPilot server using Method-2 but without issuing the required "shadow 0" command, and then attempt to run various Support Tools/Diagnostics that access the database, each may return invalid results.

For example, when Launching System Monitor:





Workaround: Use as documented Method-1 or Method-2 (with the required "shadow 0" command) when connecting to the CallPilot server.