Upgrade and Platform Migration Guide

CallPilot
Release 4.0

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Chapter 1

How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don not find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Chapter 2

Before you begin

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Getting started

CallPilot* 4.0 introduces new processes for upgrading and migrating your CallPilot system. **Ensure that you read the information in this chapter carefully before you proceed**.

Use this document to guide you through the steps that are required to:

- Perform an upgrade to CallPilot 4.0.
- Perform a platform migration to CallPilot 4.0.

How to use this guide

First step

- Ensure that you have received your upgrade kit and have assembled all of the tools you will need to complete an upgrade or platform migration. Read the section Verifying the upgrade and platform migration kit and complete the pre-upgrade & pre-platform migration checklist on page 13.
- Read the section “Approximate Time to perform upgrade & platform migration Tasks” on page 16.

Second step

- Determine whether you are performing a platform migration or an upgrade.
  - Read the section “Which process do I choose - platform migration or upgrade?” on page 19.
- Read the section “Supported software upgrade or platform migration paths” on page 22.

Third step

Once you have determined whether you are performing an upgrade or a platform migration, follow the steps below:

- If you are performing a platform migration, go to Chapter 4 “Preparing the system for migration” on page 63. The document will guide you through the remainder of the platform migration process.
- If you are performing an upgrade, go to Chapter 2 “Preparing the system for upgrade” on page 23. The document will guide you through the remainder of the upgrade process.

Verifying the upgrade and platform migration kit

The following checklist contains the contents you will need to perform an upgrade or platform migration. Although most items are included in the upgrade and platform migration kit, some are not. Ensure you have all of *the applicable* below items prior to beginning an upgrade or platform migration.

Note: Because the image CD-ROMs are platform dependent, Nortel supplies only the CD-ROMs that apply to your platform.

Note: The upgrade wizard can be downloaded and run remotely without a technician on site. Download the latest version of the upgrade wizard from Nortel in the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl. If web access is not available, a version of the upgrade wizard is available on the SU/PEP CD.

Table 1: CallPilot pre-upgrade and pre-platform migration checklist

Included in kit	Notes	PEC number	Check
My CallPilot Software CD	optional	NTUB48BA	❒
Language Prompts ■ Americas CD ■ EMEA CD ■ Asia Pacific CD	3 disk set	 NTUB44DA NTUB44EA NTUB44FA	❒
PEP CD	Download the latest PEPs from ESPL at http://www.nortel.com/espl	NTUB43BA	❒
CallPilot 4.0 Applications CD		NTUB40JA	❒
CallPilot 4.0 Desktop Messaging CD	optional	NTUB41DA	❒
CallPilot 4.0 Documentation CD		NTRG19CA	❒
201i CallPilot Image	3 disk set	NTUB50GA	❒
703t CallPilot Image	3 disk set	NTUB50HA	❒

Included in kit	Notes	PEC number	Check
1002rp AML CallPilot Image	3 disk set	NTUB50JA	❒
1002rp T1/SMDI CallPilot Image	3 disk set	NTUB50KA	❒
CallPilot 4.0 keycode		N0032917	❒
CallPilot 4.0 serial number			❒
Microsoft Windows 2003 Certificate of Authenticity (COA) (for 2.02 (2.01.27.05) and 2.5 to 4.0 upgrades only)		AO550970	❒
DTR #2005-XXX-Global CD	Download the latest DTR version from: http://www.nortel.com/PIC	N0032919	❒
RTU for Win2003 document (for 2.02 (2.01.27.05) and 2.5 to 4.0 upgrades only)		P1013471	❒

Not included in kit	Notes	PEC number	Check
Upgrade Wizard	Download from ESPL at http://www.nortel.com/espl		❒
CallPilot Top Issues bulletin	Download from http://www.nortel.com/support		❒
CallPilot *Upgrade and Platform Migration Guide*	Download the latest version from http://www.nortel.com/support		❒
Backup medium for existing CallPilot data (tape or disks)			❒
Nortel-recommended Microsoft security updates	Check P-2005-0056-Global from http://www.nortel.com/support		❒

Included in kit	Notes	PEC number	Check
Latest Upgrade Patches	Download from ESPL at http://www.nortel.com/espl		❒
If you are upgrading from a 201i, a SCSI CD ROM drive is needed (if one is not permanently connected)			❒
#2 Phillips screwdriver	Upgrade Only		❒
1002rp Server Hardware Installation Guide 555-7101-205	Upgrade Only		❒
Anti-virus software	See the *CallPilot Support for AntiVirus Applications* bulletin for Nortel approved software		❒

Approximate Time to perform upgrade & platform migration Tasks

ATTENTION

The following tables display *average* times to complete upgrade and platform migration tasks. These are approximations as there are many factors which can cause these times to vary.

Familiarize yourself with these times before scheduling an upgrade or a platform migration. Some of the tasks can be done prior to taking the CallPilot system out of service.

Approximate time per task

The following table displays *approximate* times (in minutes) allocated for each task.

Task	200i	201i	702t	703t	1001rp	1002rp	T1 1002rp
Running the Upgrade Wizard (pre-check system)	15	15	15	15	15	15	15
RAID updates	N/A	N/A	N/A	30	N/A	80	80
Running the Upgrade Wizard (including backup to tape)[a]	60	60	45	40	160	160	160
BIOS Update	N/A	10	N/A	N/A	N/A	15	15
Installing the Image	N/A	25	N/A	30	N/A	40	40
Mini-Setup & Setup Wizard	N/A	10	N/A	15	N/A	15	15
Installing PEPs[b]	N/A	15	N/A	15	N/A	15	15

Task	200i	201i	702t	703t	1001rp	1002rp	T1 1002rp
Restoring and Upgrading data (from this platform)	60	75	60	60	180	180	180
Running the Configuration Wizard[c]	N/A	30	N/A	30	N/A	40	45
Changing Hardware	N/A	N/A	N/A	N/A	N/A	60	60

a. Times for backups and restores to the network may fluctuate.

b. These times are based on 2 PEPs (and does not include download time). Additional PEPs can take 3 to 5 minutes each.

c. Configuration times are based on two languages.

Approximate total time to perform an upgrade

The following table displays average total times to perform an upgrade.

System	Approximate Total Time
201i	3.5 hours
703t	3.5 hours
1002rp	9.5 hours
T1 1002rp	10 hours

Approximate total time to perform a platform migration

The following table displays approximate total times to perform a platform migration.

Platform Migration	Approximate Total Time
200i to a 201i	3 hours
200i to a 703t	3 hours
702t to a 703t	2.5 hours
702t to a 1002rp	2.5 hours
1001rp to a 1002rp	7 hours

Platform Migration	Approximate Total Time
T1 1001rp to a T1 1002rp	7 hours

Which process do I choose - platform migration or upgrade?

Platform migration

A *platform migration* is the process of backing up the system data on an existing server and restoring the system data to a new server. If the existing server is not running the same software release as the new server, the system data is automatically upgraded to CallPilot 4.0 during the restore process.

If your current server platform is not supported, you must perform a platform migration.

The unsupported platforms are:

- 200i
- 702t
- 1001rp

Table 2 below shows the supported migration paths. Contact your distributor (channel partner) for more information.

Table 2: Supported migration paths

Platform	Migrate to 201i	Migrate to 703t	Migrate to 1002rp
200i	yes	yes	yes
201i	n/a	yes	yes
702t	no	yes	yes
703t	no	n/a	yes
1001rp	no	yes	yes
1002rp	no	no	n/a

Upgrade

An *upgrade* is the process of backing up the system data, installing a CallPilot 4.0 image, and restoring the system data on an existing supported server. The system data is automatically converted to the CallPilot 4.0 format during the restore process.

The supported platforms are:

- 201i
- 703t
- 1002rp

Table 3 below shows the supported platform configurations.

Table 3: Supported platform configurations

Platform	Component	Minimum requirements
201i	Hard drive	1 x 8 Gbytes (minimum, unformatted)
703t	Hard drives	2 x 36 Gbytes (minimum, unformatted)
	RAM	512 Mbytes (minimum)
	MPB96 board	Release 5 or later
	RAID controller	LSI Elite MegaRAID 1600 or LSI320-2
1002rp (Meridian 1* and CS 1000 configurations)	Hard drive	6 x 18 Gbytes (minimum, unformatted)
	RAM	512 Mbytes (minimum)
	MPB96 board	Release 5 or later
	or MPB16-4 board	Release 6 or later
	RAID controller	LSI Elite MegaRAID 1600 or LSI320-2
	RAID driver	4.10 or 6.45
	RAID firmware	111U or 1L37
	RAID Power Console	5.00i

Platform	Component	Minimum requirements
1002rp (T1/SMDI configurations)	Hard drive	6 x 18 Gbytes (minimum, unformatted)
	RAM	512 Mbytes (minimum)
	RAID controller	LSI Elite MegaRAID 1600 or LSI320-2
	MPB96 board	Release 5 or later
	D/480JCT-2T1	
	RAID driver	4.10 or 6.45
	RAID firmware	111U or 1L37
	RAID Power Console	5.00i

Supported software upgrade or platform migration paths

Table 4 displays the supported software upgrade or platform migration paths to CallPilot 4.0.

Note: This table applies to upgrades and platform migrations.

Table 4: Software upgrade or platform migration paths to CallPilot 4.0

CallPilot release	Upgrade directly to 4.0	Remarks
1.06, 1.07 (Meridian 1) or earlier, 2.01	No	Upgrade to 2.02 (2.01.27.05) with a minimum Service Update (SU) level of 3
1.07 T1/SMDI	No	Upgrade to 2.5 with a minimum SU level of 2
2.02 (2.01.27.05)	Yes	The system must have a minimum SU level of 3
2.5	Yes	The system must have a minimum SU level of 2
3.0	Yes	The system must be a GA release of 3.0

Note: Refer to *CallPilot Upgrade Guide* 2.02 (P0605132) or 2.5 (P0607573) for detailed information on upgrading your system from earlier releases.

Chapter 3

Preparing the system for upgrade

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Updating the RAID subsystem 41

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Getting Started

Upgrade overview

There is a new upgrade process for CallPilot 4.0. The upgrade process is largely automated by the use of wizards and consists of five main steps:

1. Preparing the system for upgrade to 4.0 by running the upgrade wizard.

   The upgrade wizard can and should be first downloaded into the CallPilot system and run remotely. This allows issues to be identified and addressed before a technician is dispatched to the site. The upgrade wizard checks for platform and software validity, validates your existing data, verifies your new keycode, and performs a full system backup.

2. Updating the server.

   Update the server hardware (if required) and then image the system.

3. Running the setup wizard.

   The setup wizard runs a second check for platform and software validity. Once complete, your existing data is then restored and upgraded.

4. Configuring the CallPilot system.

   The configuration wizard checks and completes the configuration of your server. During this process, all previously installed languages must be re-installed.

5. Completing the upgrade.

   Perform cleanup tasks such as installing virus protection, starting SNMP, and testing the system to complete the upgrade process.

Assembling your tools

Assemble the following required tools to prepare for upgrade to CallPilot 4.0:

- upgrade wizard downloaded from the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl
- keycode and server serial number

  Note: To perform an upgrade, you must have a valid CallPilot 4.0 keycode and serial number.
- CallPilot 4.0 Image CD (for server to be upgraded)
- backup medium for existing CallPilot data (tape or network share)
- (if you are upgrading from a 201i) a SCSI CD ROM drive is needed (if one is not permanently connected)

Installing the upgrade wizard

Download the latest version of the upgrade wizard from Nortel in the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl. Download and unzip the CP40_UpgradeWizard PEP to the D:\temp\UpgradeWizard directory. (If web access is not available, a version of the upgrade wizard is available on the SU/PEP CD). **Note:** The upgrade wizard can be downloaded and run remotely without a technician on site.

Do not try to download and install a newer version of the upgrade wizard while an older version is running.

1 Double-click the UpgradeWizardInstaller.exe file.

Result: The Welcome screen appears.

2 Read all of the information on the Welcome screen and, if necessary, exit all Windows programs.

3 Click Next.

Result: The Choose Destination Location screen appears.

4 If the suggested destination folder is not suitable, click Browse and choose a different location for the upgrade wizard installation.

5 Click Next.

Result: The Start Installation screen appears.

6 Click Next.

Result: The system installs the upgrade wizard on the CallPilot server. When the installation is complete, the Installation Complete screen appears.

7 Click Finish.

Running the upgrade wizard

The upgrade wizard checks if your CallPilot system is ready for an upgrade; it does not make any changes to your system. The upgrade wizard is an application that analyzes the software and hardware components of your system and helps you prepare for the upgrade. The upgrade wizard performs the following tasks:

- platform validation (software and hardware)
- data validation
- keycode validation
- system backup

The upgrade wizard has several ***optional*** exit points. You can use them to perform the upgrade preparation tasks in three phases:

- Check for platform and software validity in advance of the actual upgrade.
- Validate your existing data prior to the upgrade.
- Complete the wizard to fully prepare for upgrade.

ATTENTION

Do not launch or run programs or utilities during the upgrade.

Do not use Windows Explorer to copy files or to scan disk drives during an upgrade as this can cause the upgrade to fail.

The upgrade wizard can be run while the CallPilot 2.02 (2.01.27.05) or 2.5 system is fully operational.

You can exit the wizard at any point, make the necessary changes to CallPilot, and rerun the upgrade wizard without harming your system.

The figures in this chapter are examples and may not match those shown on your system.

Starting the upgrade wizard

1 Launch the upgrade wizard from the Start menu by clicking Start > Program Files > CallPilot > Upgrade Wizard.

Note: While the upgrade wizard is running, all screen information is written to the log file at D:\Nortel\Data\UpgradeWizard.log.

Checking platform and software validity

2 Click Next on the Upgrade Wizard - Welcome screen to determine if your hardware and software can be upgraded to CallPilot 4.0.

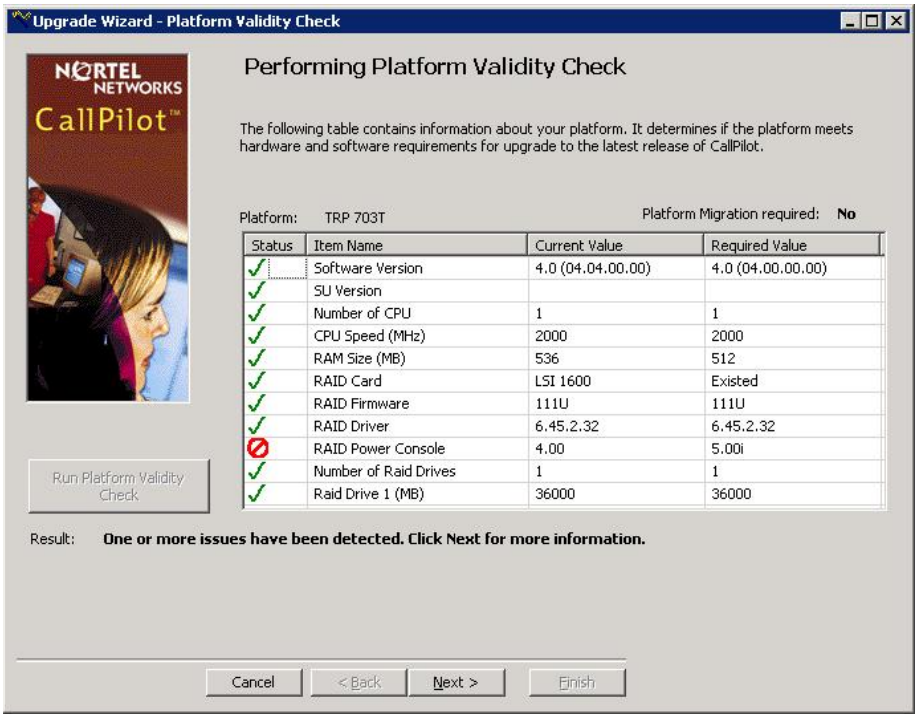
Result: The Platform Validity Check screen appears, which lists the software and hardware currently on the system and evaluates the status of each item.

ATTENTION

If your RAID subsystem needs to be updated, the following screen will display red icons under the status columns for the RAID card, RAID controller firmware, or RAID driver items. If any of these items need to be updated, continue with the upgrade wizard. The upgrade wizard prompts you to update the RAID subsystem prior to creating a backup.

Take note of the RAID card type and firmware on the Platform Validity Check screen. You will need this information when you update your RAID subsystem.

Figure 1: Platform Validity Check - supported platform



3 Click Next to continue.

If your RAID subsystem needs to be updated, the following screen appears. Click Next and follow prompts.

Figure 2: Unsupported RAID Subsystem Configuration

Result: The upgrade wizard checks your software version.

IF your software	THEN
does not meet the minimum software requirements	■ the Platform Validation - Unsupported Software Version screen appears. Do the following: **a.** exit the upgrade wizard. **b.** upgrade your software to 2.02 (2.01.27.05) or 2.5 for T1/SMDI systems, referring to the *CallPilot Upgrade Guide* 2.02 (2.01.27.05) or 2.5 for instructions.
needs to have service updates (SUs)	■ the Platform Validation - Unsupported Software Version screen appears. Do the following: **a.** exit the upgrade wizard. **b.** upgrade your server to the minimum service update level. **c.** restart the upgrade wizard. **d.** proceed to "Running the upgrade wizard" on page 26.
meets minimum software requirements	■ continue to the next step.

Note: In steps 4 and 5, a screen appears only if the checks fail or the platform is unsupported.

4 The upgrade wizard analyzes your platform.

IF your platform	THEN
is unsupported	■ the Platform Validation - Unsupported Platform screen appears. ■ proceed to Chapter 4 "Preparing the system for migration" on page 63.
is supported	■ the upgrade wizard continues. ■ continue to the next step.

5 The upgrade wizard checks if the computer name and database are synchronized.

IF they	THEN
are not synchronized	■ the Checking Computer Name screen appears. **ATTENTION:** When you click next, the wizard prompts you for confirmation. If you click Yes, the server automatically restarts and your system will be out of service. This is particularly important if you are running the upgrade wizard from a remote location. You cannot continue with the wizard until the names are synchronized. ■ Click Next to synchronize the names. ■ When the system restarts, you must relaunch the upgrade wizard. ■ When the system is in full service, go back to step 2.
are synchronized	■ the upgrade wizard continues.

6 The upgrade wizard performs a disk space check. There must be enough free disk space to perform data validation and a system backup.

IF the disk	THEN
does not have enough free space	■ the Checking Free Disk Space screen appears. ■ you must free up space on the D: drive by removing unnecessary files. ■ follow the link on the screen and use the instructions to free up enough space and then click Next. ■ the wizard performs another check and if there is still not enough space, the Checking Free Disk Space screen reappears. ■ if there still is not enough free disk space, exit the wizard and call your support organization.
has enough free space	■ the upgrade wizard continues.

OPTIONAL EXIT POINT

The platform and software validity check is complete. The upgrade wizard has confirmed that your hardware and software meet the requirements for an upgrade. You can either:

- exit the wizard by clicking Cancel, or
- continue to the next step.

Checking CallPilot data for validity

ATTENTION

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

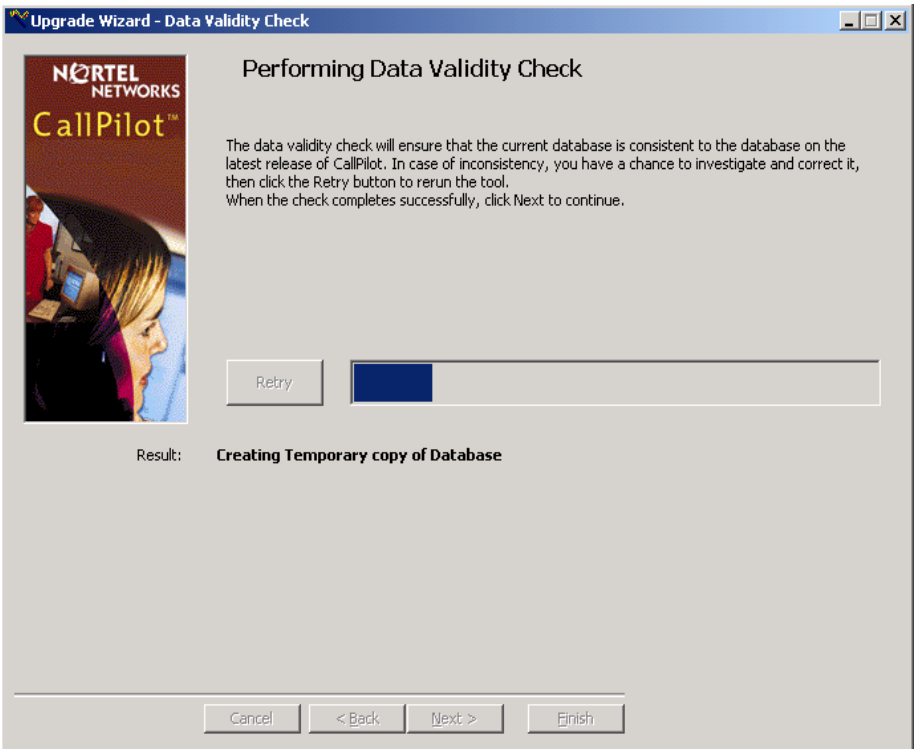
7 Click next to determine if your data is valid and can be upgraded to CallPilot 4.0.

Result: The Prepare for Data Validation screen appears.

8 Click Next to validate your data.

Result: The Performing Data Validity Check screen appears. A process bar shows how much of the data has been validated.

Figure 3: Performing Data Validity Check



IF	THEN
your data validation fails	■ follow the displayed link and examine the log file for errors. ■ contact your distributor (channel partner) if you need assistance to resolve the errors.
your data validation passes	■ click next to continue.

OPTIONAL EXIT POINT

The data validation is complete. The wizard has confirmed that your data can be upgraded to CallPilot 4.0. **Note:** In the next step you must insert the Image CD in the drive. If you are upgrading remotely, you should exit at this point.

You can either:

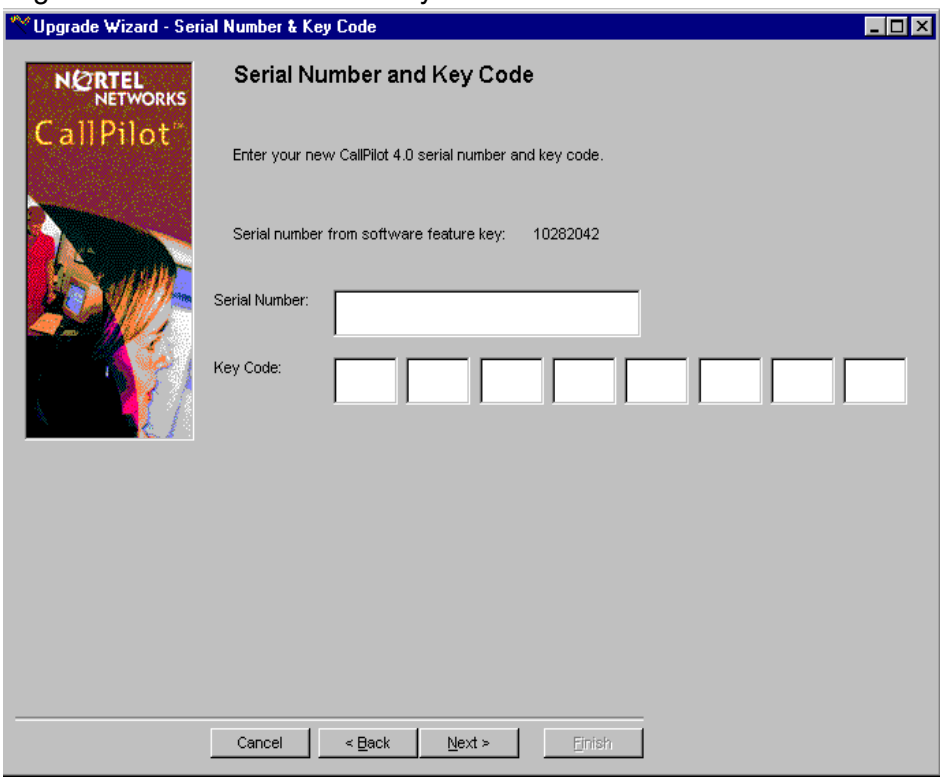
- exit the upgrade wizard by clicking Cancel and run the wizard at another time, or
- continue to the next step. You will need your keycode, serial number, and Image CDs to proceed and access the system's CD ROM drive.

Verifying your CallPilot 4.0 keycode

9 Click Next to verify your new CallPilot keycode.

Result: The Serial Number and Key Code screen appears.

Figure 4: Serial Number and Key Code



10 Type your new CallPilot 4.0 serial number and keycode in the appropriate boxes and click Next.

IF the serial number	THEN
does not match the keycode	■ the Feature Verification - Failure screen appears. ■ click Back and carefully reenter the serial number and keycode exactly as written. ■ if the keycode still is not verified, exit the wizard and contact your support organization to obtain a new keycode.
matches the keycode	■ the Feature Verification - Success screen appears. ■ click Next to continue with the wizard.

11 Check your installed features against the screen list. If a feature is missing from your new keycode, contact your distributor to obtain a new keycode.

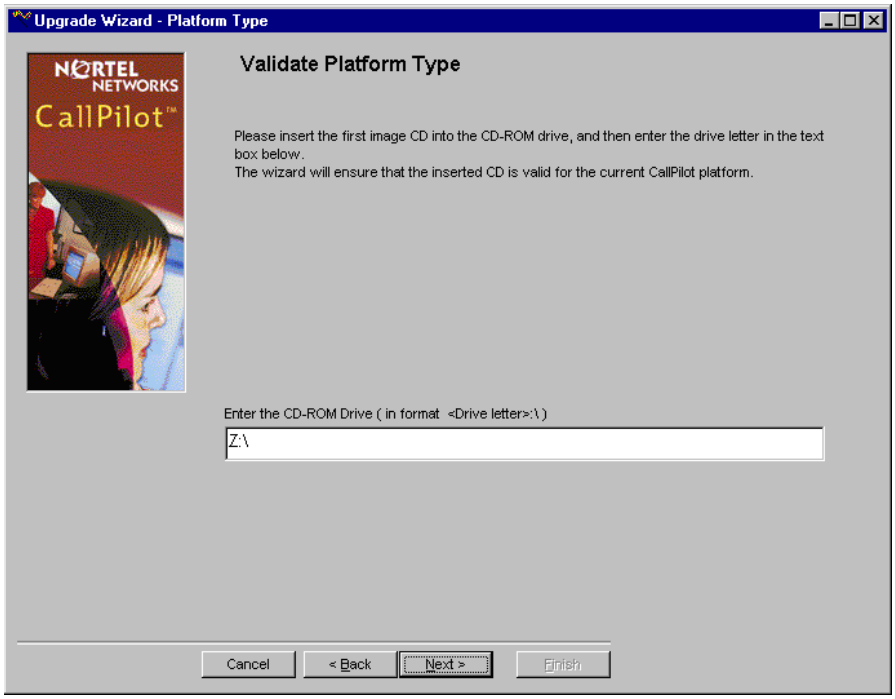
Figure 5: Feature Verification

Verifying your CallPilot 4.0 Image CD

12 Click Next to verify that your Image CD matches your CallPilot platform.

Result: The Validate Platform Type screen appears.

Figure 6: Validate Platform Type



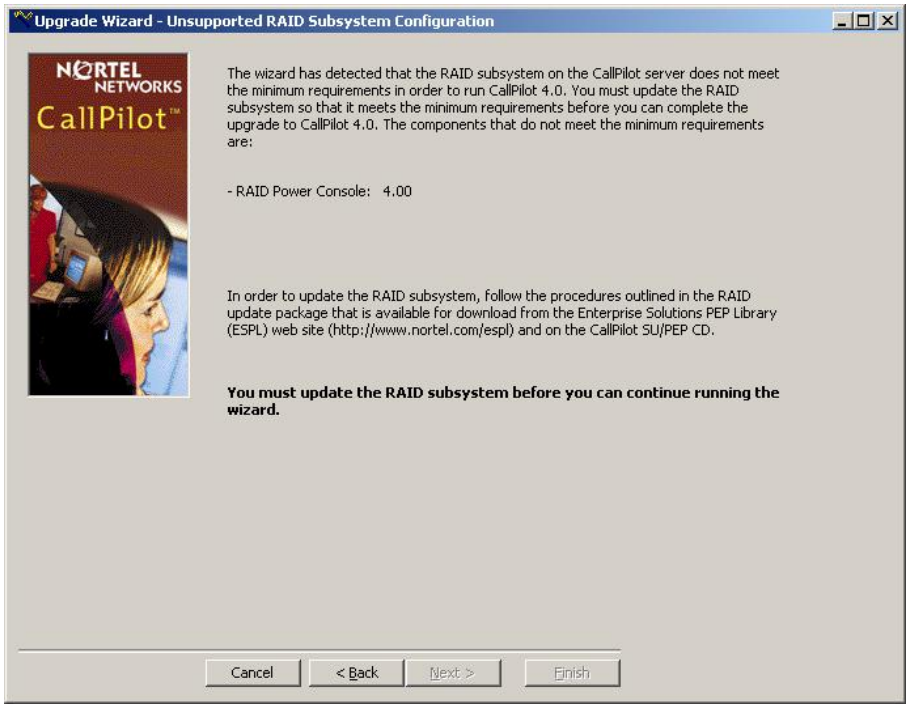
13 Insert the CallPilot 4.0 Image CD into the CD-ROM drive, enter the drive letter, and click Next.

14 The wizard checks that the inserted CD is valid for your platform.

Note: If the CD is not valid, the wizard blocks the rest of the upgrade process and you must contact your distributor (channel partner) to obtain the correct CD.

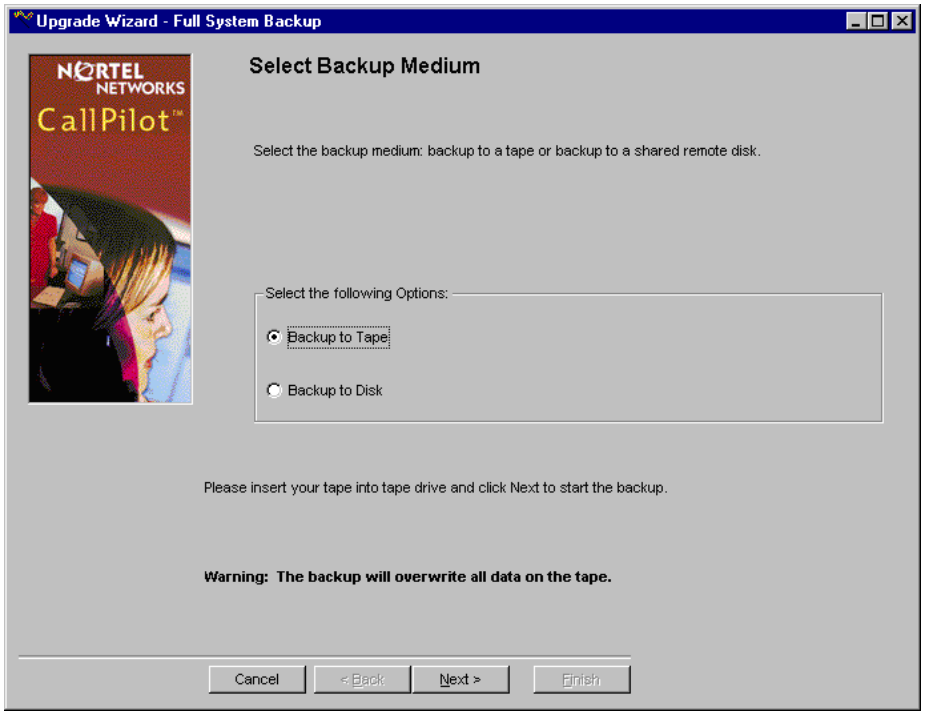
Note: *If your RAID subsystem needs to be updated*, the following screen appears.

Figure 7: Unsupported RAID Subsystem Configuration



Result: The Select Backup Medium screen displays.

Figure 8: Select Backup Medium



OPTIONAL EXIT POINT

The wizard has now confirmed that your keycode is valid and that you have the correct Image CD. Do not proceed to the next step until you are ready to take the system off-line and complete the upgrade. You can either:

- exit the upgrade wizard by clicking Cancel, or
- continue to the next step.

Selecting the backup medium

Ensure that you read the following cautionary statement below before proceeding with the backup.

ANY MESSAGES RECEIVED AFTER BACKUP BEGINS WILL BE LOST DURING THE SYSTEM UPGRADE

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

15 Select the type of backup medium for your CallPilot data.

- ***If you choose to back up to tape****:*

ATTENTION

This process will overwrite existing data on the tape.

Insert the tape into the tape drive and click Next to start the backup immediately. Proceed to step 16.

- ***If you choose to back up to disk:***

Click Next to choose the backup device. The Full System Backup - Select Backup Devices screen appears. Click List Devices.

Result: The screen displays the backup devices that are defined on your CallPilot server.

If no devices are listed, log in to CallPilot Manager and define your backup devices (System > Backup/Restore > Maintain > Configure backup devices). Click List Devices again. Select the backup device you want to use and click Next to start the backup.

Use the following procedure if you need to create a network share for backup and restore:

a. Create a new folder in desired location, preferably not in the same partition as the Operating System.

b. Right click on the newly created folder and select Sharing and Security

c. In the Sharing tab, select Share this folder

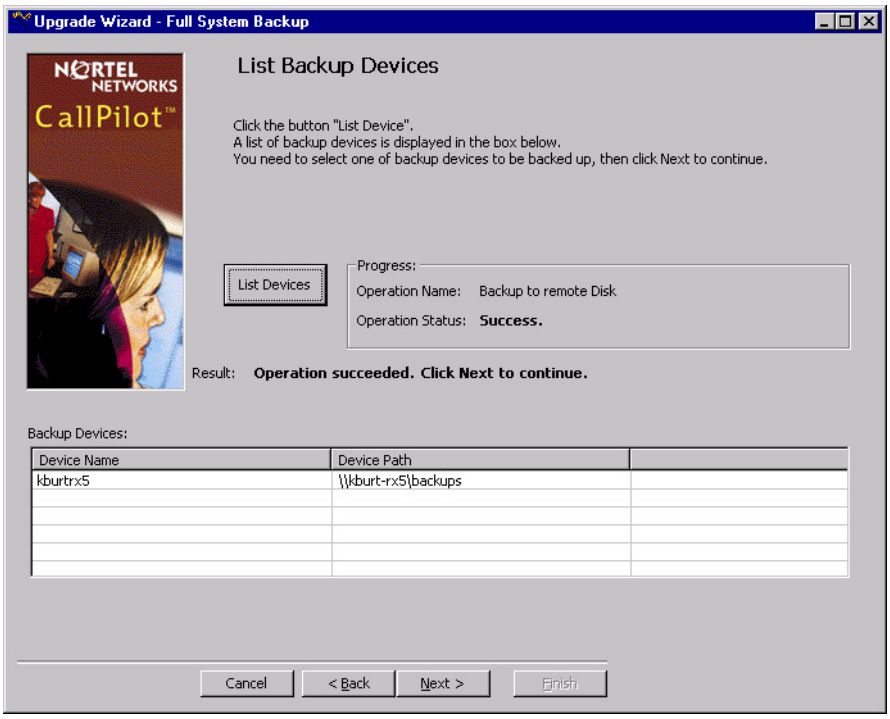
d. Select Permissions and add NGenSys. Select full control

e. Remove all other user names or groups. Click ok

f. Select the security tab and add NGenSys user and give Full control Click ok.

If the list is populated, select the appropriate backup device and click Next to start the backup.

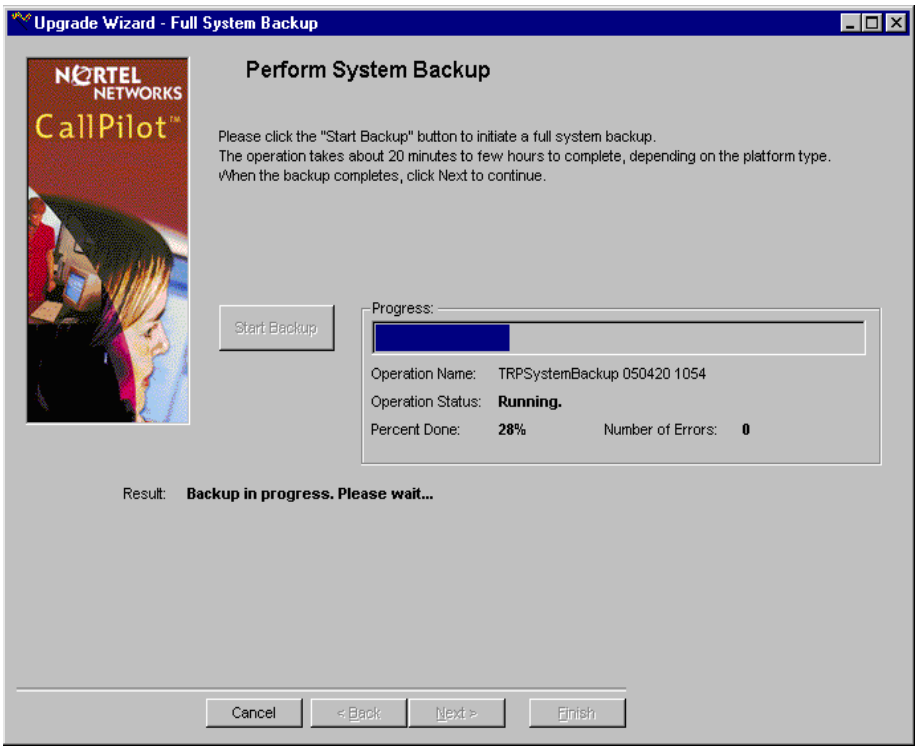
Figure 9: Full System Backup - List Backup Devices



Backing up your data

16 The Perform System Backup screen appears and the backup starts.

Figure 10: Full System Backup - Perform System Backup



17 A progress bar shows the percent complete and the status is displayed.

IF	THEN
there are errors	■ follow the displayed link and examine the log file for errors. ■ contact your distributor (channel partner) if you need assistance to resolve the errors. ■ click the Restart button to restart the backup process.
there are no errors	■ click Next.

18 Once the backup is complete, eject the tape from the tape drive.

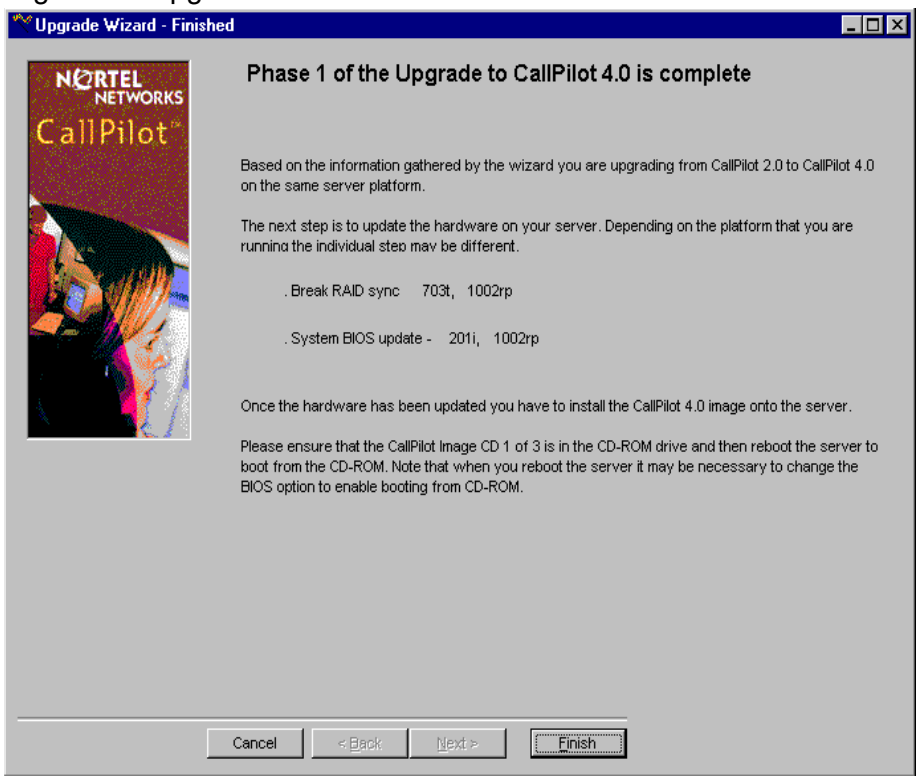
Attention: Failure to remove the tape from the drive will add an hour or more to the restore process.

19 Click Next.

Note: This backup can be used if you must restore your system back to the original release.

Result: The Phase 1 of the Upgrade to CallPilot 4.0 is complete screen appears.

Figure 11: Upgrade Wizard - Finished



20 Click Finish to close the upgrade wizard.

Result: Phase 1 is now complete.

21 Print or record the IP information located in the file D:\Nortel\Data\IPCONFIGURATION.txt.

Note: You need the IP information if your backup is on a network drive, or if you are downloading PEPs from the network prior to the restore process. You also need this IP information to configure your ELAN and CLAN after the restore process. The IPCONFIGURATION.txt file is saved as part of your backup, and is available after the restore.

What's next?

You are now ready to split the RAID drives. For instructions, see "Splitting the RAID drives" on page 45.

Updating the RAID subsystem

If the Upgrade Wizard indicates that one or more of your RAID components requires updating, follow the applicable procedure.

ATTENTION

Nortel strongly recommends that you split your RAID before proceeding with any type of CallPilot software upgrade.

ATTENTION

Nortel strongly recommends that you perform a graceful stop of CallPilot services before proceeding to upgrade.

- If you are running CallPilot 2.02 (2.01.27.05) or 2.5, proceed to ”Updating your RAID subsystem - CallPilot 2.02 or 2.5”.
- If you are running CallPilot 3.0 or greater, proceed to “Updating your RAID driver - CallPilot 3.0 and later” on page 43.

Updating your RAID subsystem - CallPilot 2.02 or 2.5

If you are running CallPilot 2.02 (2.01.27.05) or CallPilot 2.5, you must update the following RAID components:

- RAID controller firmware
- RAID driver
- RAID Power Console

Follow the instructions below to update your RAID subsystem.

201i—updating the RAID subsystem

The 201i does not have a RAID system. Proceed to Chapter 4, “Updating the server,” on page 47.

703t and 1002rp—updating the RAID subsystem

1 Download and unzip the CP40_RAIDUpgrade PEP from the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl.

Result: The files are extracted to the D:\temp directory.

2 Read the readme.txt file, which describes the contents of the archive.

3 Your RAID board type and firmware were determined by the configuration wizard (see step 2 on page 27).

- *If the controller listed is LSI1600*, then the firmware is 111U and you will require the LSI1600.exe file.
- *If the controller listed is LSI320-2*, then the firmware is 1L37 and you will require the LSI320.exe file.

You are now ready to update the RAID controller firmware.

4 Create a RAID firmware upgrade disk.

a. If you are running the LSI1600, launch the LSI1600.exe file. If you are running the LSI320-3, launch the LSI320.exe file.

b. Insert a blank floppy disk into drive A and press OK.

c. Click Setup.

d. When prompted to use settings, press Y.

Result: A bootable floppy drive containing the firmware for your RAID controller is created.

e. Remove floppy disk from drive A.

f. Depending on your controller, label the disk **LSI1600 111U Firmware Upgrade Disk** or **LSI320-2 1L37 Firmware Upgrade Disk**.

5 Double-click the raidup.exe file, click OK and click unzip.

Result: A directory labeled RAIDUP is created on your D drive (D:RAIDUP).

6 Browse to C:\WINNT\SYSTEM32\DRIVERS\mraid3xx. Right-click on this file and select Properties, and then select Version. Verify the version is 4.09.

7 Uninstall the Power Console 4.00:

a. Click Start > Settings > Control Panel > Add/Remove programs.

b. Select Power Console Plus Package.

c. Click Add/Remove.

d. Click Automatic.

e. Click Finish.

f. The system may ask you to delete unused files. Select Yes to all.

g. Press OK to close the Add/Remove programs applet.

8 You are now ready to update the RAID driver:

a. Click Start > Settings > Control Panel > SCSI Adapters.

b. Select the Driver tab.

c. Click Add.

d. Select Have Disk and browse to the following folder: D:\RAIDUP\NT4.

e. Select the **oemsetup.inf** file. The system asks you to select the mraidxx.sys file.

f. Restart the system.

9 Install the Power Console 5:

a. Browse to the D:\RAIDUP\PC5 directory.

b. Run the setup.bat file, which installs the Power Console 5.

Attention: Ensure you run the setup.*bat* file and *not* the setup**.***exe* file.

10 Restart the system.

11 Turn off the system.

12 Insert the floppy disk created in previous steps (labeled either **LSI1600 111U Firmware Upgrade Disk** or **LSI320-2 1L37 Firmware Upgrade Disk**).

13 Restart the system.

Result: The system restarts into a DOS boot menu.

14 Follow the prompts below to update the firmware.

a. The system confirms that you are upgrading to 111U firmware (if you have an LSI1600 RAID controller) or 1L37 firmware (if you have an LSI320-2 RAID controller). Click Y in response to all questions.

b. The system continues upgrading the firmware. When the upgrade is complete, you are prompted to restart the system.

15 Remove the floppy disk and restart the system.

16 During the restart process, when prompted, select CTRL+M to configure the RAID Controller.

a. In the MegaRaid BIOS Configuration Utility, select Objects > Adapter > Other Adapter option to ensure the following options are set:

- Auto-rebuild = DISABLED
- Force boot = ON
- Coercion Algorithm = GigaByte-way

b. In the RAID Controller, browse to Objects > Channel to ensure the SCSI Transfer Rate is set as **160M**. (The default speed for the LSI320-2 is 320M).

c. Exit from the RAID Configuration program.

17 Restart the system. Once complete, the firmware should be **111U** (if you have an LSI1600 RAID Controller) or 1**L37** (if you have an LSI320-2 RAID Controller), and the driver should be 4.10.

18 Your RAID subsystem is now updated.

Note: BK INIT indicates a consistency check. It is not an initialization process.

19 You can now run the upgrade wizard. Proceed to “Running the upgrade wizard” on page 26.

Updating your RAID driver - CallPilot 3.0 and later

If you are running CallPilot 3.0 or later you only need to update the RAID driver. Refer to the following instructions.

201i—updating the RAID driver

The 201i does not have a RAID system. Proceed to “Running the upgrade wizard” on page 26.

703t and 1002rp—updating the RAID driver

1 Download and unzip the CP40_RAIDUpgrade PEP from the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl.

Result: The files are extracted to the D:\temp directory.

2 Read the readme.txt file, which describes the contents of the archive.

3 Double-click the raidup.exe file.

Result: A directory labeled RAIDUP is created on your D drive (D:RAIDUP).

4 From your desktop, right-click on the My Computer icon. Select Properties, click on the Hardware tab and then click Device Manager.

Result: Device Manager window appears.

5 In the Device Manager window, select SCSI controllers and then double-click either the 1600 or 320-2 RAID Controller.

Result: The RAID Controller properties window appears.

6 Select the Driver tab and click the Update Driver button.

Result: The hardware update wizard begins.

7 Select the **Install from a list of specific locations** option button and click Next.

Result: A wizard window with a Browse button appears.

8 Browse to D:\RAIDUP\Win2k3 and click Next.

9 Click Finish.

10 Restart the server.

11 Your RAID driver is successfully updated. Proceed to “Running the upgrade wizard” on page 26.

Splitting the RAID drives

In a RAID system, the mirror drives contain the exact image of your existing system. Taking these mirror drives offline preserves your existing system information. In the unlikely event of an upgrade failure, the original system can be quickly restored from the mirror drives.

There are separate instructions for splitting the drives on the 703t and 1002rp servers.

Note: The 201i server does not have a RAID system. For 201i servers, proceed to Chapter 4, "Updating the server," on page 47.

Splitting the 703t RAID drives

The 703t has only one physical drive per channel. Use the Windows MegaRAID console to split the drive without risk of CallPilot database corruption.

1 Load the MegaRAID Power Console Plus.

IF you are upgrading from	THEN click
CallPilot 3.0 and later	Start > Programs > Power Console Plus > Launch Client.
all other releases	Start > Programs > MegaRAID Client.

Result: The MegaRAID Power Console Plus window appears.

2 Ensure all drives are in the online state (marked green).

3 Select the Physical View option button.

4 In the Physical Devices section, right-click the Channel-2 hard disk drive. Example: Channel-2 (0) A1-2-Onln.

5 Select Tools > Fail Drive from the pop-up menu.

Result: A message box appears advising that marking the online drive Failed will result in changes.

6 Ignore the warning and click OK. The drive status changes to failed and the color of the icon changes to red. Example: Channel-2 (0) A1-2-Failed.

Result: The audible alarm should start beeping.

Attention: You can silence the alarm, but under no circumstances should you disable it. On the toolbar, select Objects > Adapter > Alarm Console > Silence Alarm from the toolbar.

At this point, the RAID is split, and the drive marked failed becomes the backup drive and is no longer written to.

You are now ready to install the CallPilot image. For instructions, see Chapter 4, "Updating the server," on page 47.

Splitting the 1002rp RAID drives

The 1002rp has three physical drives. RAID splitting must be done at the Ctrl+M utility level.

Attention: Do not perform this procedure using the Windows MegaRAID console as there is a risk of database corruption.

1. Restart the CallPilot system and press Ctrl+M, when prompted, to enter the RAID setup utility during bootup.
2. From the Management menu, select Objects > Physical Drive.

   Result: A list of all drives organized per channel appears.
3. Select the A01- 2 drive using the cursor and press Enter.
4. Select Fail Drive.

   Result: A warning message box appears. Ignore it and select Yes. The drive status changes to failed. The alarm should start beeping.
5. Repeat this process for the remaining two drives present on Channel 2.

ATTENTION

All failed drives must be on the same channel.

6. Press Esc three times to exit the Ctrl+M utility.
7. Restart the system.

   Result: The system reports that three drives are in critical mode and starts beeping. This is okay; the system will still restart.

   Attention: You can silence the alarm, but under no circumstances should you disable it. On the toolbar, select Objects > Adapter > Alarm Control > Silence Alarm from the toolbar.

At this point, the RAID is split, and the drives marked FAILED become the backup drives and are no longer written to.

What's next?

You are now ready to install the CallPilot image. For instructions, see Chapter 4, "Updating the server," on page 47.

Chapter 4

Updating the server

In this chapter

Getting started 48

Replacing 1002rp T1/SMDI server hardware 49

Expanding the 1002rp AML system 53

Upgrading the system BIOS 56

Installing the CallPilot 4.0 Image 59

Getting started

The installation of the CallPilot image has three major steps:

- Perform required hardware upgrades.
- Update the system platform hardware, if required.
- Use the CallPilot 4.0 Image CDs to install a fresh image of the Windows Server 2003 operating system and CallPilot server software on your CallPilot server.

Based on which server you have, use the chart below to guide you to the appropriate next section. Be sure to assemble your required tools before proceeding. See the section ”Assemble the tools required to install the CallPilot 4.0 Image” below.

IF YOUR server is	Proceed with
201i	the section “201i—updating the system BIOS” on page 56.
703t	the section “Installing the CallPilot 4.0 Image” on page 59.
1002rp T1/SMDI	the section “Replacing 1002rp T1/ SMDI server hardware” on page 49.
1002rp AML and you are not expanding the number of channels or MPUs beyond 96	the section “1002rp—updating the system BIOS” on page 57.
1002rp AML and you are expanding the number of channels or MPUs beyond 96	the section “Expanding the 1002rp AML system” on page 53.

Assemble the tools required to install the CallPilot 4.0 Image

- #2 Phillips screwdriver (CallPilot 2.5 on 1002rp T1/SMDI or expanding the 1002rp Meridian 1/Succession* 1000 system).
- *1002rp Server Hardware Installation* 555-7101-205.
- CallPilot 4.0 Image CDs (2 or 3).
- Windows 2003 Certificate of Authenticity (COA).

Replacing 1002rp T1/SMDI server hardware

IMPORTANT: CallPilot 2.5 systems, running on a 1002rp T1/SMDI server, require hardware changes.

Taking safety precautions

Before making any changes to the server hardware, follow these safety precautions:

- Respect appropriate ESD rules.
- Power the system off.
- Do not drop and leave screws inside the server.
- Do not drop hard objects (such as screwdrivers) inside the server as this can damage the server.

1002rp T1/SMDI: replacing hardware

Table 5 lists the hardware that must be replaced on 1002rp T1/SMDI systems.

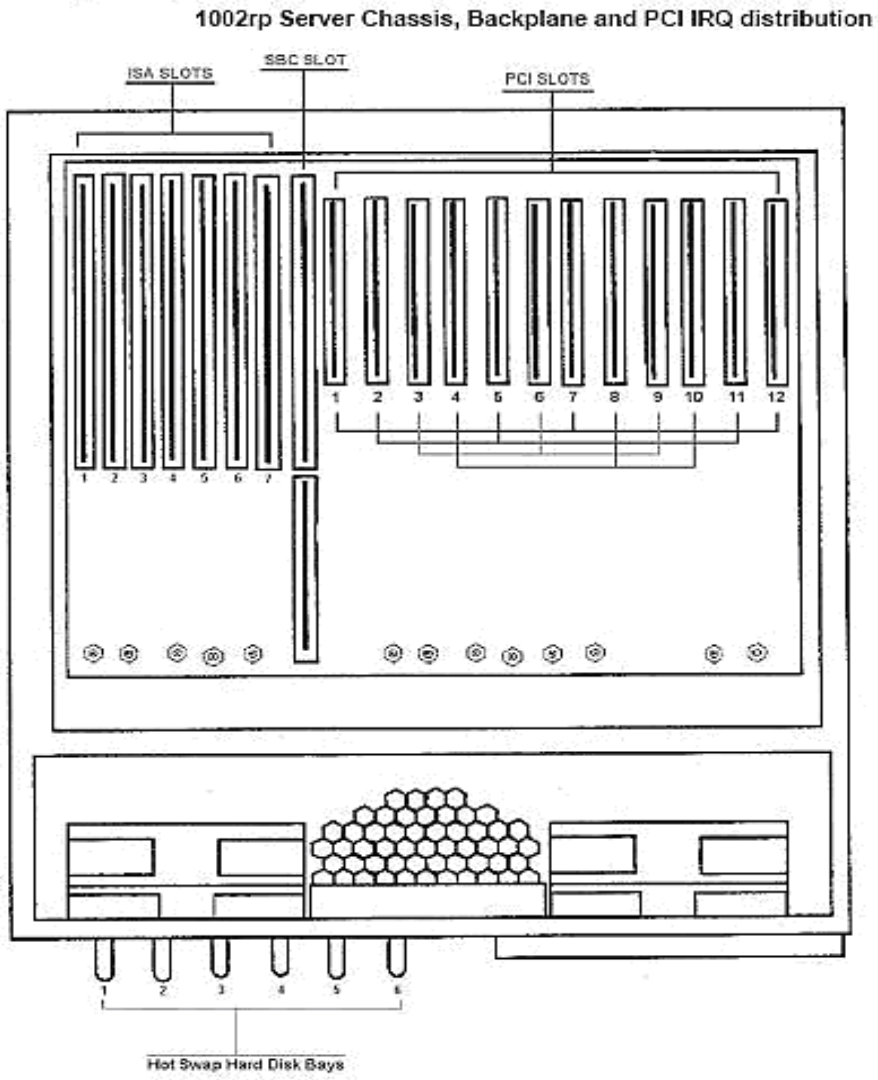
Table 5: 1002 rp T1/SMDI hardware replacements

Unsupported hardware	Supported hardware
ISA T1 interface card (D480SC)	PCI T1 interface card (D/480JCT-2T1)
MPB16-4 board	MPB96 board

Removing unsupported hardware

Figure 12 on page 50 shows the 1002rp server chassis.

Figure 12: 1002rp server chassis



1 Remove the SC-Bus cable that connects the ISA T1 cards on the left side of the SBC to the MPB16 cards on the right side of the SBC.

2 Remove the ISA T1 cards plugged in ISA slots 4,5,6, and 7. (Slot count is from left to right.)

3 Remove the MPB16 cards plugged in PCI slots 3 and 4.

Determining new board and card configuration

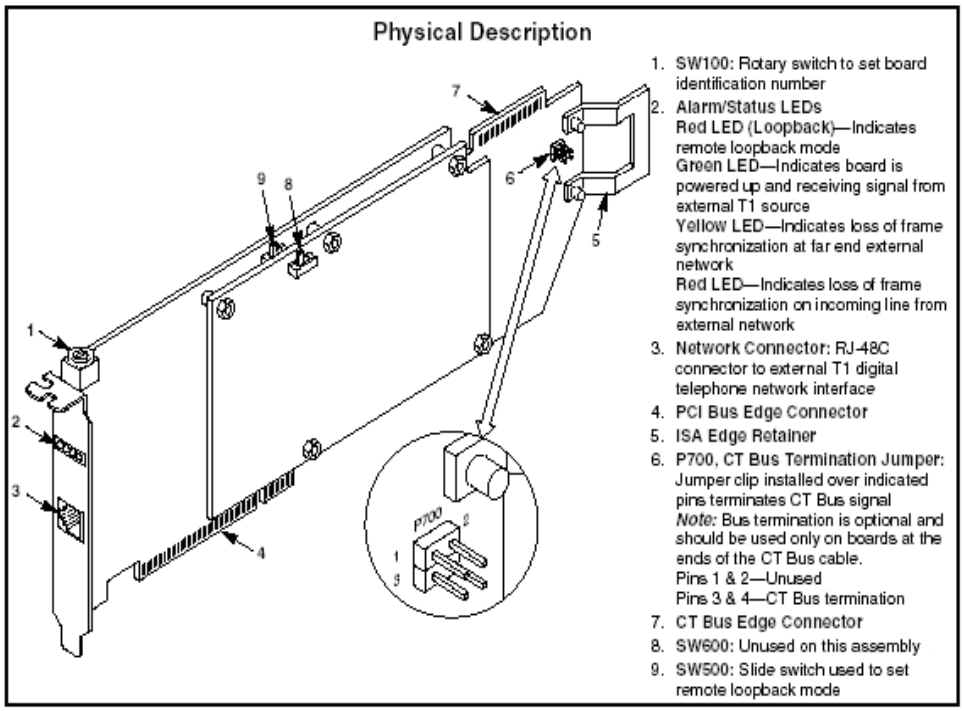
There are two valid configurations for PCI T1 cards and MPB 96 boards. Table 6 on page 51 shows valid configurations.

Table 6: MPB96 and T1 configuration

MPB96 boards	PCI T1 cards	Max. Channels	MPU
1	2	96	96
3	4	192	288

Determine which configuration applies to your system. Figure 10 shows the layout of jumpers and switches on the D/480JCT-2T1 PCI T1 board.

Figure 13: D/480JCT-2T1 PCI T1 board



Attention: You must use one of the valid configurations and respect the slot map or the system behavior will be erratic.

Installing one MPB96 and two T1 PCI cards

1 Plug the MPB96 card in PCI slot 3.

2 On the first Intel D/480JCT-2T1 PCI card:

a. Set the card SW100 ID rotary dial switch to 0.

b. Ensure that there are no termination jumpers installed on P700.

3 Plug the Intel D/480JCT-2T1 PCI card 1 in PCI slot 4.

4 On the second Intel D/480JCT-2T1 PCI card:

a. Set the card SW100 ID rotary dial switch to 1.

b. Set the termination jumpers P700 3&4-jumper to ON (for CT Bus termination enabled).

Note: Only one Intel D/480JCT-2T1 PCI card in the system (the last on the CT Bus cable) should have the termination jumper to ON.

5 Plug the Intel D/480JCT-2T1 PCI card 1 in PCI slot 5.

6 Connect the 3 drop CT-Bus cable so all three connectors are securely connected to all cards.

Note: If a 7 drop cable is used in this configuration, ensure that the end connectors are connected to the end cards and no connector is left dangling at any end of the cable.

Installing three MPB96 and four T1 PCI cards

1 Plug the MPB96 card in PCI slot 3.

2 On the first Intel D/480JCT-2T1 PCI card:

a. Set the card SW100 ID rotary dial switch to 0.

b. Ensure that there are no termination jumpers installed on P700.

3 Plug the Intel D/480JCT-2T1 PCI card 1 in PCI slot 4.

4 On the second Intel D/480JCT-2T1 PCI card:

a. Set the card SW100 ID rotary dial switch to 1.

b. Ensure that there are no termination jumpers installed on P700.

5 Plug the Intel D/480JCT-2T1 PCI card 2 in PCI slot 5.

6 Plug the MPB96 card in PCI slot 6.

7 On the third Intel D/480JCT-2T1 PCI card:

a. Set the card SW100 ID rotary dial switch to 2.

b. Ensure that there are no termination jumpers installed on P700.

8 Plug the Intel D/480JCT-2T1 PCI card 3 in PCI slot 7.

9 On the fourth Intel D/480JCT-2T1 PCI card:

a. Set the card SW100 ID rotary dial switch to 3.

b. Ensure that there are no termination jumpers on P700 pins 3 and 4.

10 Plug the Intel D/480JCT-2T1 PCI card 4 in PCI slot 8.

11 Plug the MPB96 card in PCI slot 9.

12 Connect the 7 drop CT Bus cable to ensure that the end connectors are connected to the end cards and no connector is left dangling at any end of the cable.

Expanding the 1002rp AML system

Taking safety precautions

Before making any changes to the server hardware, follow these safety precautions:

- Respect appropriate ESD rules.
- Power the system off.
- Do not drop and leave screws inside the server.
- Do not drop hard objects (such as screwdrivers) inside the server as this can damage the server.

1002rp AML: replacing hardware

To expand the 1002rp AML system beyond 96 channels, remove all MPB16-4 cards and replace them with MPB96 cards. If your system has one MPB96 card, proceed with "Determining new board and card configuration" on page 54.

Note: To expand the 1002rp AML system, you must add MGate cards to the Meridian 1 or CS1000 system. Refer to *CallPilot Planning and Engineering Guide* (555-7101-101), and *CallPilot Installation and Configuration Task List* (555-7101-210).

Table 7 lists the hardware that must be replaced on 1002rp AML systems when expanding beyond 96 channels.

Table 7: 1002rp AML system hardware replacements

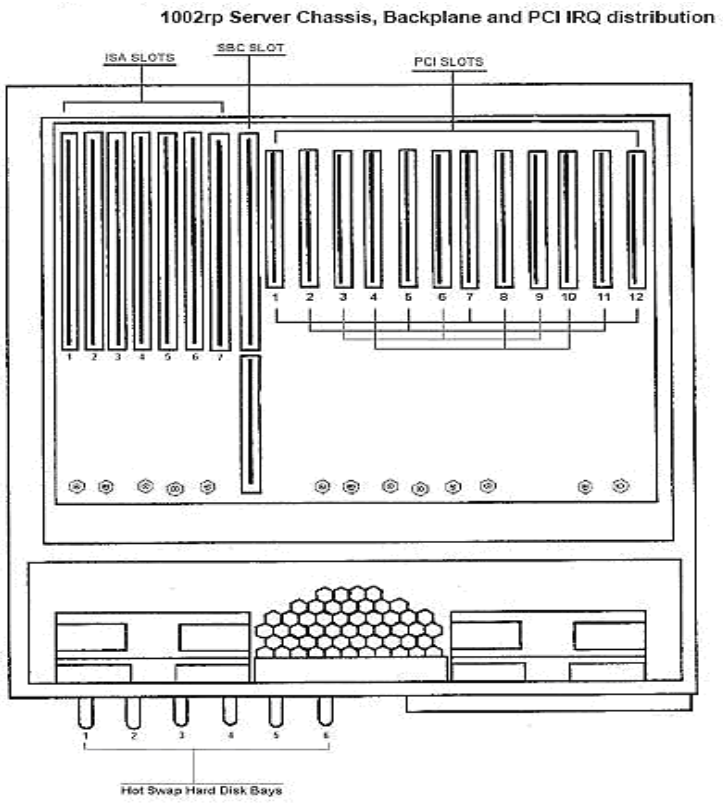
Desired Capacity	Supported Hardware
Maximum 96 channels/96 MPU	1 MPB96 or 2 MPB 16-4
Maximum 192 channels/288 MPU	3 MPB96

Note: A mix of MPB96 and MPB16-4 is not supported.

Removing unsupported hardware

Figure 14 on page 54 shows the 1002rp server chassis.

Figure 14: 1002rp server chassis



1 Remove the SC-Bus cable that connects the two MPB16-4 cards.

2 Remove the MPB16-4 cards

Determining new board and card configuration

There are two valid configurations for an expanded 1002rp AML system. Table 8 shows valid configurations.

Table 8:
MPB96 configuration

MPB96 boards	Max. Channels	MPU
2	192	192
3	192	288

Determine which configuration applies to your system.

Attention: You must use one of the valid configurations and respect the slot map or the system behavior will be erratic.

Installing three MPB96 cards

1. Install an MPB96 card in PCI slot 3.
2. Install an MPB96 card in PCI slot 6.
3. Install an MPB96 card in PCI slot 9.
4. Install a 7-drop CT bus cable connecting the three MPB96 cards.

Note: If a 7 drop cable is used in this configuration, ensure that the end connectors are connected to the end cards and no connector is left dangling at any end of the cable.

What's Next?

Proceed with "1002rp—updating the system BIOS" on page 57.

Upgrading the system BIOS

201i—updating the system BIOS

Windows Server 2003 runs correctly on your 201i server only if you upgrade the system BIOS to version 6.0.3. Upgrade the system BIOS before applying the CallPilot server image from the CD-ROMs.

ATTENTION

Updating the system BIOS will erase all data on the hard drive. Perform this step only if you have run the upgrade wizard and your data is backed up.

1. Turn on the CallPilot server.
2. Insert the CallPilot 4.0 Image CD 1 into the CD-ROM drive.
3. Press F2 to enter the BIOS setup program at the following prompt:

   ```
   Press F2 to enter SETUP
   ```

   Result: The BIOS setup page opens.
4. Select Advanced by using the left or right arrow keys.
5. Select Installed O/S by using the up or down arrow keys.
6. Change the value in the Installed O/S section to Other by pressing the plus or minus sign.
7. Press F10.
8. Select Yes to confirm that the changes must be saved.

   Result: The server reboots.
9. Type Y at the following prompt:

   ```
   BOOT ROM DOS (Default to No in 5 seconds) (Y/N)
   ```

   Result: A menu appears on the screen.
10. Select Menu Item 1, SCSI CD ROM, and press Enter.

    Result: The Dos Prompt A:> appears.
11. Navigate to the Z:\ drive and run the Phase1.bat file.

    Result: The Phase1.bat file runs and the server reboots. A dialog box appears.
12. Type Y at the following prompt:

    ```
    Y to Start Phase 1, N to Abort operation and go to DOS
    (Y/N).
    ```

    Result: A dialog box appears.
13. Type Y at the following prompt:

    ```
    Y to Start Phase 1, N to go back to previous menu (Y/N).
    ```

Result: A dialog box appears.

14 Type Y at the following prompt:

```
BOOT ROM DOS (Default to No in 5 seconds) (Y/N)
```

Result: This action launches the ROM DOS.

15 Navigate to the Z:\ drive and run the Phase2.bat file.

Result: The Phase2.bat file runs and the server reboots. A dialog box appears.

16 Type Y at the following prompt:

```
Y to Start Phase 2, N to Abort operation and go to DOS
(Y/N).
```

Result: A dialog box appears.

17 Type Y at the following prompt:

```
Y to Start Phase 2, N to go back to previous menu (Y/N).
```

Tip: The server now boots from the C: drive by default.

Result: A dialog box appears.

18 Press Enter when the system displays the following prompt:

```
1. Update BIOS.
```

ATTENTION

The monitor screen appears blue while the BIOS is being updated. DO NOT touch the keyboard during this time.

19 A dialog box informs you that the Flash Memory has been successfully programmed. Press any key to restart the system.

Note: After updating the BIOS, the system boots again from the C: drive.

20 You are now ready to install the CallPilot 4.0 Image. Proceed to the section “Installing the CallPilot 4.0 Image” on page 59.

703t—updating the system BIOS

The system BIOS does not need to be updated on a 703t server. Proceed to the section “Installing the CallPilot 4.0 Image” on page 59.

1002rp—updating the system BIOS

1 Disconnect the cable that connects the CallPilot server to the CLAN subnet. This is done to isolate the system from any undesired activity from the network, such as virus attacks. Do not reinstall the CLAN cable until antivirus software is installed on the CallPilot server.

2 Power on the CallPilot server.

3 Insert the CallPilot Image CD 1 of 3 for the platform into the CD-ROM drive.

4 Set the CallPilot server BIOS to boot from the CD-ROM.

Result: The server boots from the CD-ROM and displays the installation menu.

a. Restart the server.

b. While the server is restarting, press the del key at the prompt.

Result: The system checks the SCSI devices and a menu appears.

c. Press the right arrow key until Boot is highlighted.

d. Press Enter.

Result: A submenu appears and 1st Boot Device is highlighted.

e. Press the + key until [ATAPI CDROM] appears as the 1st Boot Device.

f. Press F10 to save this setting.

Result: A dialog box appears.

g. Highlight OK and Press Enter.

Result: The system restarts from the CD ROM.

5 Press 3 to select `Utilities (BIOS, Firmware, etc...)`, and then press Enter.

6 Press 1 to select `Update 1002rp BIOS to version NNCXUA07` and then press Enter.

Result: The system prompts you to confirm that the single board computer (SBC) is a SLE model.

7 Choose Y to confirm.

Result: The system prompts you to save the existing BIOS.

8 Type n and then press Enter.

Result: The system prompts you to enter the file name.

9 Type nncxua07.rom and then press Enter.

Result: The system prompts you to program the boot block.

10 Choose Y to confirm.

Result: The system updates the BIOS and then prompts you to reboot the server.

11 Press Ctrl+Alt+Delete to reboot the CallPilot server.

Result: The CallPilot server reboots.

12 During the reboot sequence, check the version of the BIOS on the top of the first screen. The BIOS version must be NNCXUA07.

Tip: If the BIOS version is not NNCXUA07, then check if the J10 and J11 jumpers are both in the top position. Power down the server, remove the single board computer (SBC) board, and set the jumpers to the correct position. Follow the electrostatic discharge (ESD) rules to prevent static electricity from damaging the SBC board.

13 Proceed to the next section, “Installing the CallPilot 4.0 Image” on page 59.

Installing the CallPilot 4.0 Image

Installing on a 201i platform

1. Power down the CallPilot server.
2. Disconnect the cable that connects the CallPilot server to the CLAN.

   Note: This is done to isolate the system from any undesired activity from the network, such as virus attacks. Do not reinstall the CLAN cable until antivirus software is installed on the CallPilot server.
3. Insert the CallPilot Image CD-ROM 1 of 3 for the 201i platform into the CD-ROM drive.
4. Power on the CallPilot server.

   Result: The server reboots and displays the following prompt: `BOOT ROM DOS (Default to No in 5 seconds) (Y/N).`
5. Type Y.

   Result: The ROM DOS menu opens.
6. Type 1 to select option `1. SCSI CD-ROM` and press Enter.
7. At the A:\ command prompt, navigate to the Z:\ drive and run the image.bat file.

   Result: The image.bat file runs and the server reboots from the CD-ROM. The image installation startup menu displays the following prompt: `Enter 1 to install and boot into Windows setup, 2 to install and exit to DOS (1,2).`
8. Enter 1 to install and boot into Windows setup.

   Result: The system asks if you are performing an upgrade.
9. Type Y to confirm. If you type N, the system exits to DOS.

   Result: The system asks if the upgrade wizard has run.
10. Type Y to confirm. If you type N, the system exits to DOS.

    Result: The system asks if the hardware has been checked and updated.
11. Type Y to confirm. If you type N, the system exits to DOS.

    Result: The system asks if you are sure you want to install the image.
12. Type Y to confirm. If you type N, the system exits to DOS.

    Result: The system starts installing the CallPilot 4.0 image. During the installation, the system displays the following prompt once or twice (depending on the size and number of the server hard drives): `Insert next media and press Enter to continue`.
13. Remove the current CD-ROM from the CD-ROM drive, insert the next CD-ROM, and press Enter.

Result: At this point, the server starts the Windows Server 2003 mini-setup process, during which the server reboots several times. The mini-setup process finalizes the configuration of the Windows Server 2003. The CallPilot server is now in the same state as if it were shipped from the factory.

14 Remove the CD-ROM from the CD-ROM drive.

15 Proceed to the section “Attaching the Windows 2003 COA” on page 62.

Installing on 703t and 1002rp platforms

1 Power down the CallPilot server.

2 Disconnect the cable that connects the CallPilot server to the CLAN. This is done to isolate the system from any undesired activity from the network, such as virus attacks. Do not reinstall the CLAN cable until antivirus software is installed on the CallPilot server.

3 Power on the CallPilot server.

4 Insert the CallPilot Image CD-ROM 1 of 3 for the platform that is being upgraded into the CD-ROM drive.

5 Set the CallPilot server BIOS to boot from the CD-ROM.

If your server is a 1002rp, then:

a. Restart the Server.

b. While the server is restarting, press the del key at the prompt.

Result: The system checks the SCSI devices then a menu appears.

c. Press the right arrow key until Boot is highlighted.

d. Press Enter.

Result: A submenu appears and 1st Boot Device is highlighted.

e. Press the + key until [ATAPI CDROM] appears as the 1st Boot Device.

f. Press F10 to save this setting.

Result: A dialog box appears.

g. Highlight OK and press Enter.

Result: The system restarts from the CD ROM and displays the installation startup menu.

h. Proceed to step 6.

If your server is a 703t, then:

a. Restart the server.

b. When the server begins its restart cycle, press the Esc key four or five times in succession immediately after the keyboard lights flash.

Result: A menu appears.

c. Use the up or down arrow key to select ATAPI CD-ROM.

d. Press Enter.

Result: The system restarts from the CD ROM and displays the installation startup menu.

e. Proceed to step 6.

6 Select option 1 (`Install CallPilot server image for 703t/ 1002rp, reboot...,`) and press Enter.

Result: The system asks if you are performing an upgrade.

7 Type Y to confirm. If you type N, the system exits to DOS.

Result: The system asks if the upgrade wizard has been run.

8 Type Y to confirm. If you type N, the system exits to DOS.

Result: The system asks if the hardware has been checked and updated.

9 Type Y to confirm. If you type N, the system exits to DOS.

Result: The system asks if you are sure you want to install the image.

10 Type Y to confirm. If you type N, the system exits to DOS.

Result: The system starts installing the CallPilot 4.0 image. During the installation, the system displays the following prompt once or twice (depending on the size and number of the server hard drives): `Insert media and press Enter to continue`.

11 Remove the current CD-ROM from the CD-ROM drive, insert the next CD-ROM and press Enter.

Result: After the CallPilot 4.0 image has been applied, the server reboots automatically.

- *If your server is a 1002rp,* proceed to step 12.
- Otherwise, proceed to step 13.

12 Set the CallPilot server BIOS to the original settings.

a. While the server is restarting, press the del key at the prompt.

Result: The system checks the SCSI devices, then a menu appears.

b. Press the right arrow key until Boot is highlighted.

c. Press Enter.

Result: A submenu appears and 1st Boot Device is highlighted.

d. Press the + key until the original settings appear.

e. Press F10 to save this setting.

Result: A dialog box appears.

f. Highlight OK and Press Enter.

Result: The system restarts.

g. Proceed to next step.

13 Remove the CD-ROM from the CD-ROM drive.

Result: At this point, the server starts the Windows Server 2003 mini-setup process, during which the server reboots several times. The mini-setup process finalizes the configuration of the Windows Server 2003. The CallPilot server is now in the same state as if it were shipped from the factory.

Attaching the Windows 2003 COA

Note: Your screen may display a warning message requiring you to register and activate Windows 2003. You have 30 days in which to do this, so you can continue with the upgrade. The procedure for registering and activating Windows 2003 is described under “Registering and activating Windows 2003” on page 111.

Attach the Windows 2003 COA sticker to the CallPilot server. If you performed an upgrade, place the sticker over the Windows NT COA.

The CallPilot 4.0 system is ready to be set up.

What’s next?

You are now ready to restore your data. For instructions, see Chapter 5 “Running the setup wizard” on page 81.

Chapter 5

Preparing the system for migration

In this chapter

Getting Started 64
Running the upgrade wizard 66

Getting Started

Platform migration overview

There is a new migration process for CallPilot 4.0. It is largely automated by the use of wizards and consists of four major steps:

1. Preparing the original system for migration to 4.0 by running the upgrade wizard.

   The upgrade wizard can and should be first downloaded into the CallPilot system and run remotely. This allows issues to be identified and addressed before a technician is dispatched to the site. The upgrade wizard checks for platform and software validity, validates your existing data, verifies your new keycode, and performs a full system backup.

2. Running the setup wizard on the new 4.0 server.

   The setup wizard runs a second check for platform and software validity. Once complete, your existing data is then restored and upgraded.

3. Configuring the CallPilot 4.0 system.

   The configuration wizard checks and completes the configuration of your server. During this process, all previously installed languages must be re-installed.

4. Completing the upgrade.

   Perform cleanup tasks like installing virus protection, starting SNMP, and testing the system to complete the upgrade process.

Assembling your tools

Assemble the following required tools to prepare for a migration to CallPilot 4.0.

- upgrade wizard downloaded from Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl
- keycode and server serial number. This keycode must match the serial number issued with your new dongle

  Note: To perform a migration, you must have a valid CallPilot 4.0 keycode and serial number.
- backup medium for existing CallPilot data (tape or disks)
- if you are upgrading from a 201i, a SCSI CD ROM drive is needed (if one is not permanently connected, or if you are not backing up to a network drive)

Installing the upgrade wizard

Download the latest version of the upgrade wizard from Nortel in the Enterprise Solutions PEP Library (ESPL) at http://www.nortel.com/espl. Download and unzip the CP40_UpgradeWizard PEP to the D:\temp\UpgradeWizard directory. (If web access is not available, a version of the upgrade wizard is available on the SU/PEP CD). **Note:** the upgrade wizard can be downloaded and run remotely without a technician on site.

Do not try to download and install a newer version of the upgrade wizard while an older version is running.

1 Double-click the UpgradeWizardInstaller.exe file.

Result: The Welcome screen appears.

2 Read all of the information on the Welcome screen and, if necessary, exit all Windows programs.

3 Click Next.

Result: The Choose Destination Location screen appears.

4 If the suggested destination folder is not suitable, click Browse and choose a different location for the upgrade wizard installation.

5 Click Next.

Result: The Start Installation screen appears.

6 Click Next.

Result: The system installs the upgrade wizard on the CallPilot server. When the installation is complete, the Installation Complete screen appears.

7 Click Finish.

Running the upgrade wizard

The upgrade wizard checks if your CallPilot system is ready for a platform migration. The upgrade wizard is an application that analyzes the software and hardware components of your system and helps you prepare for the platform migration. The upgrade wizard performs the following tasks:

- platform validation (software and hardware)
- data validation
- keycode validation
- system backup

The upgrade wizard has several ***optional*** exit points. You can use them to perform the migration preparation tasks in three phases:

- Check for platform and software validity in advance of the actual migration.
- Validate your existing data prior to the migration.
- Complete the wizard to fully prepare for migration.

ATTENTION

Do not launch or run programs or utilities during the migration.

Do not use Windows Explorer to copy files or to scan disk drives during a migration as this can cause the upgrade to fail.

You can exit the wizard at any point, make the necessary changes to CallPilot, and rerun the upgrade wizard without harming your system.

The figures in this chapter are examples and may not match those shown on your system.

Starting the platform migration

1 Launch the upgrade wizard from the Start menu by clicking Start > Program Files > CallPilot > Upgrade Wizard.

Note: While the upgrade wizard is running, all screen information is written to the log file at D:\Nortel\UpgradeWizard.log.

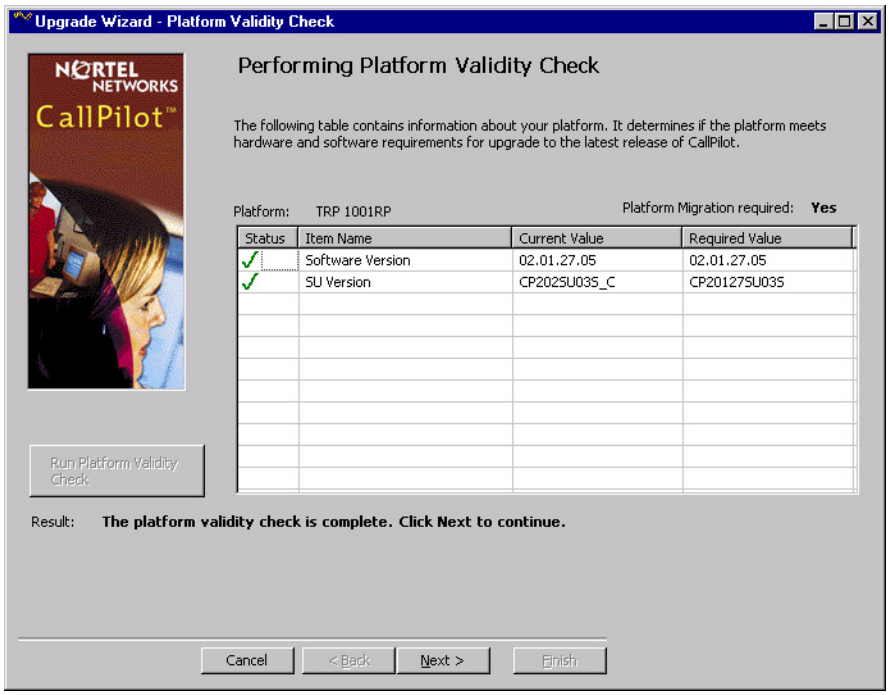
Checking platform and software validity

2 Click Next on the Upgrade Wizard - Welcome screen to determine if your hardware and software can be migrated to CallPilot 4.0.

Result: The Platform Validity Check screen appears.

The Platform Validity screen lists the software and hardware currently on the system and evaluates the status of each item. The screen below differs if you are migrating from a supported platform.

Figure 15: Platform Validity Check - unsupported platform



3 Click Next to continue.

Note: In steps 4 and 5, a screen appears only if the checks fail or the platform is unsupported.

Result: The upgrade wizard checks your software version.

IF your software	THEN
does not meet the minimum software requirements	■ the Platform Validation - Unsupported Software Version screen appears. Do the following: **a.** exit the upgrade wizard. **b.** upgrade your software to 2.02 (2.01.27.05) or 2.5 for T1/SMDI systems referring to the *CallPilot Upgrade Guide 2.02 (2.01.27.05) or 2.5* for instructions.
needs to have service updates (SUs) applied	■ the Platform Validation - Unsupported Software Version screen appears. Do the following: **a.** exit the upgrade wizard. **b.** upgrade your server to the minimum service update level. **c.** restart the upgrade wizard. **d.** proceed to “Running the upgrade wizard” on page 66.
meets minimum software requirements	■ continue to the next step.

4 The upgrade wizard analyzes your platform.

IF your platform	THEN
is unsupported	■ the Platform Validation - Unsupported Platform screen appears. ■ click Next to continue with the wizard. ■ continue to the next step.
is supported	■ the upgrade wizard continues ■ continue to the next step.

5 The upgrade wizard checks if the computer name and database are synchronized.

IF they	THEN
are not synchronized	■ the Checking Computer Name screen appears. ■ click Next to have the wizard synchronize the names. **ATTENTION:** When you click next, the server automatically restarts and your server will be out of service. You cannot continue with the wizard until you have synchronized names. ■ When the system restarts, you must relaunch the upgrade wizard. ■ Go back to step 2.
are synchronized	■ the upgrade wizard continues.

6 The upgrade wizard performs a disk space check. There must be enough free disk space to perform data validation and a system backup.

IF the disk	THEN
does not have enough free space	■ the Checking Free Disk Space screen appears. ■ you must free up space on the D: drive by removing unnecessary files. ■ follow the link on the screen and use the instructions to free up enough space then click Next. ■ the wizard performs another check and if there is still not enough space, the Checking Free Disk Space screen reappears. ■ if there still is not enough free disk space, exit the wizard and call your support organization.
has enough free space	■ the upgrade wizard continues.

OPTIONAL EXIT POINT

The platform and software validity check is complete. The upgrade wizard has confirmed that your hardware and software meet the requirements for a migration. You can either:

- safely exit the wizard by clicking Cancel, or
- continue to the next step.

Checking CallPilot data for validity

ATTENTION

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

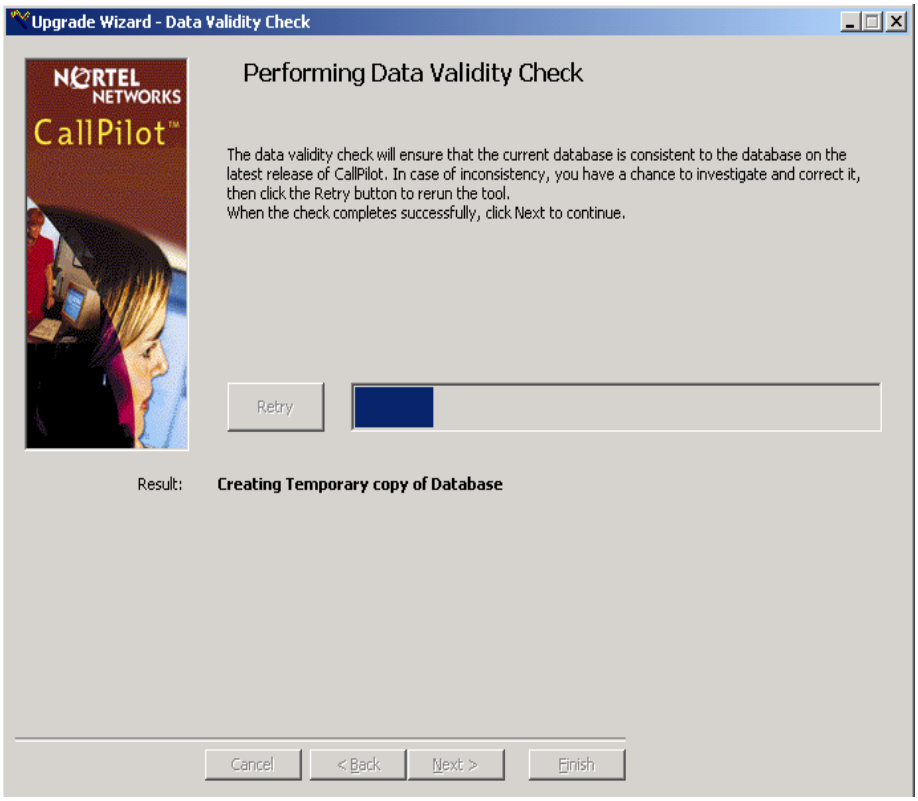
7 Click next to determine if your data is valid and can be migrated to CallPilot 4.0 or click Cancel to exit.

Result: The Prepare for Data Validation screen appears.

8 Click Next to validate your data.

Result: The Performing Data Validity Check screen appears. A process bar shows how much of the data has been validated.

Figure 16: Performing Data Validity Check



IF	THEN
your data validation fails	■ review the upgrade log file and contact your distributor (channel partner) for assistance.
your data validation passes	■ click next to continue.

OPTIONAL EXIT POINT

The data validation is complete. The wizard has confirmed that your data can be migrated to CallPilot 4.0. You can either:

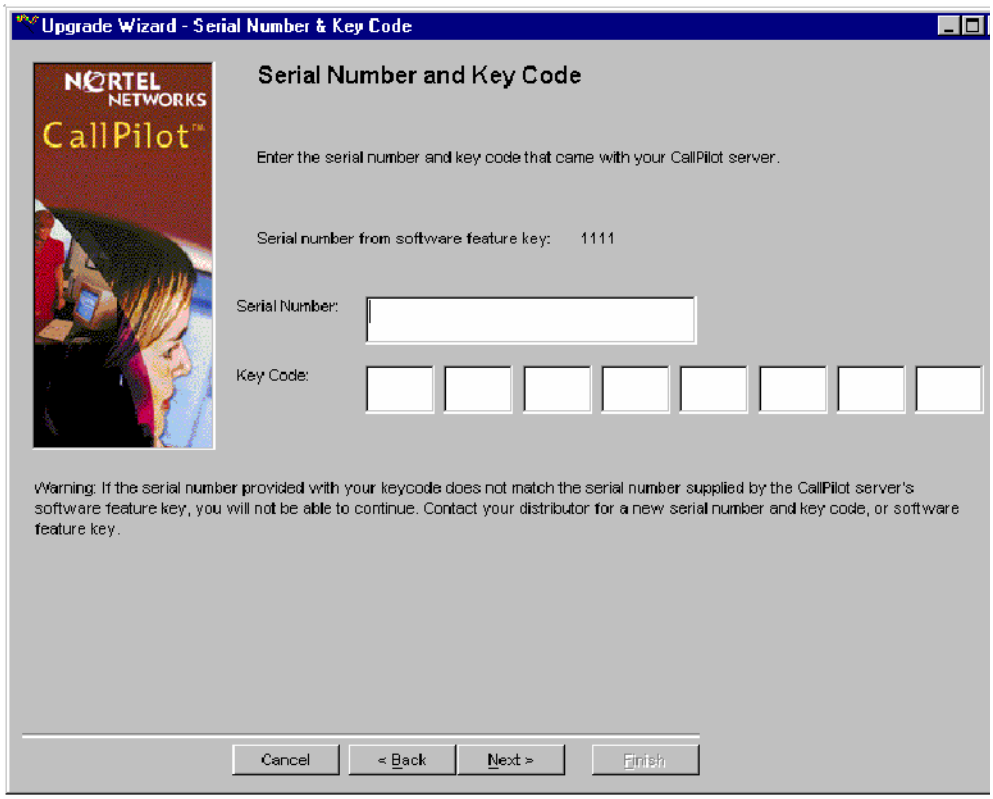
- exit the upgrade wizard by clicking Cancel and run the wizard at another time, or
- continue to the next step. You will need your keycode and serial number to proceed.

Verifying your CallPilot 4.0 keycode

9 Click Next to verify your new CallPilot keycode.

Result: The Serial Number and Key Code screen appears.

Figure 17: Serial Number and Key Code

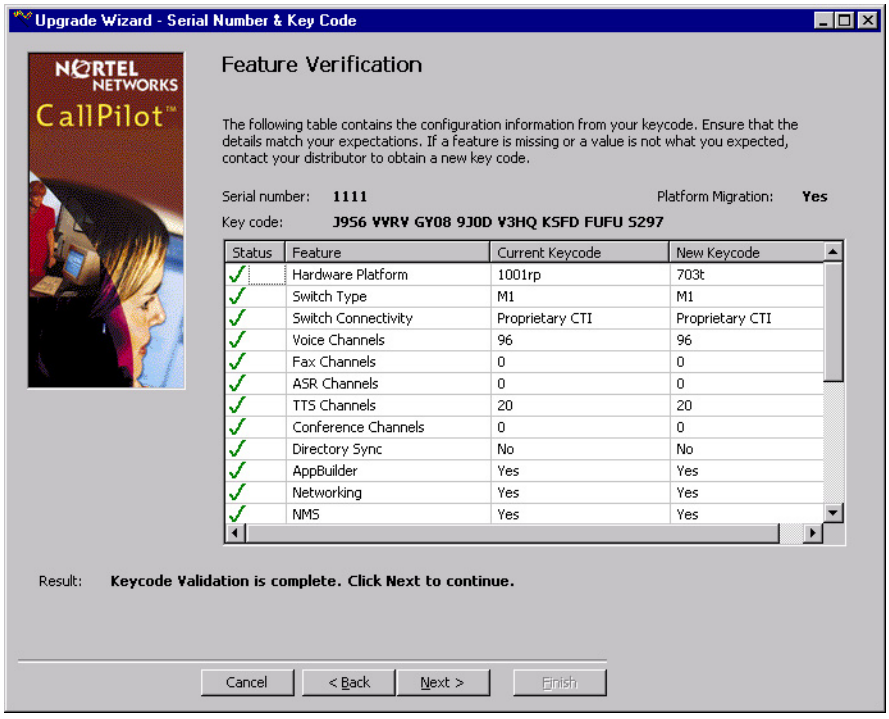


10 Type your new CallPilot dongle serial number and keycode in the appropriate boxes and click Next.

IF the serial number	THEN
does not match the keycode	■ the Feature Verification - Failure screen appears. ■ click Back and carefully reenter the serial number and keycode exactly as written. ■ if the keycode still is not verified, exit the wizard and contact your support organization to obtain a new keycode.
matches the keycode	■ the Feature Verification - Success screen appears. ■ click Next to continue with the wizard.

11 Check your installed features against the screen list. If a feature is missing from your new keycode, contact your distributor to obtain a new keycode.

Figure 18: Feature Verification



Verifying the platform migration

12 Click Next to verify the platform migration. The upgrade wizard determines if a platform migration is required.

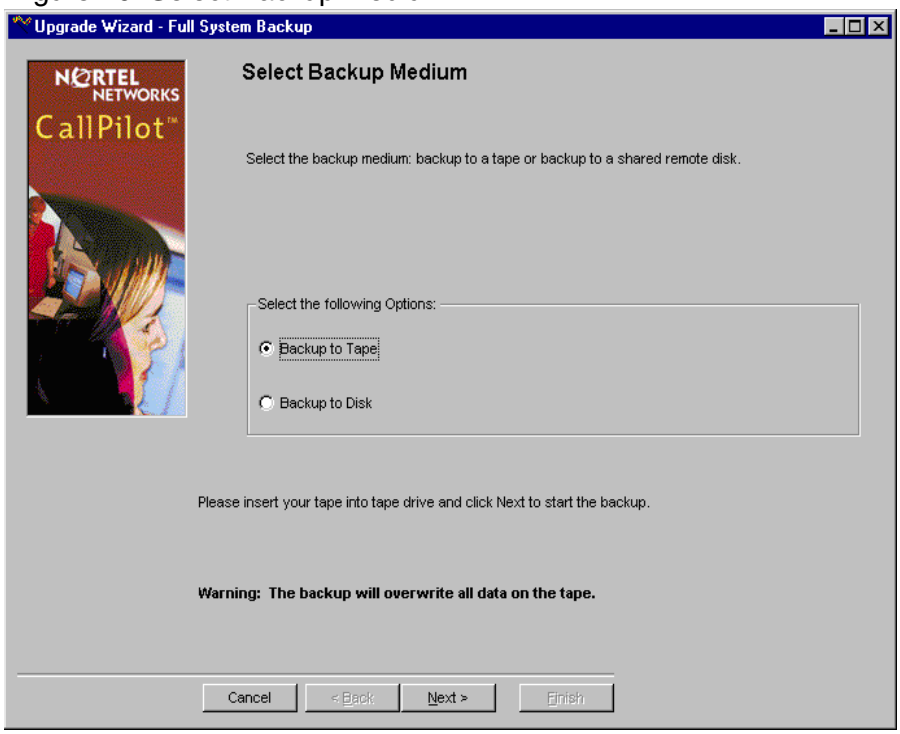
Result: The Platform Migration Confirmation screen appears.

Figure 19: Platform Migration Confirmation

13 Click Next to confirm that you intend to perform a platform migration.

Result: The Select Backup Medium screen displays.

Figure 20: Select Backup Medium



Selecting backup medium

Ensure that you read the following cautionary statements before proceeding with the backup.

ANY MESSAGES RECEIVED AFTER BACKUP BEGINS WILL NOT BE RESTORED ONTO THE NEW SERVER.

To avoid losing user messages, either:

1) courtesy down all voice channels prior to running the backup, or

2) provide users access to the original server. Users can then access new messages which might be received after backup begins.

ATTENTION

The backup takes from 1 to 3 hours to complete and consumes considerable CPU resources. Nortel recommends that you back up your data only when system is courtisied down.You can click Cancel to exit the wizard and choose another time to run the backup.

14 Select the type of backup medium for your CallPilot data.

- ***If you choose to back up to tape:***

ATTENTION

This process will overwrite existing data on the tape.

Insert the tape firmly in the tape drive and click Next to start the backup immediately. Proceed to step 15.

- ***If you choose to back up to disk:***

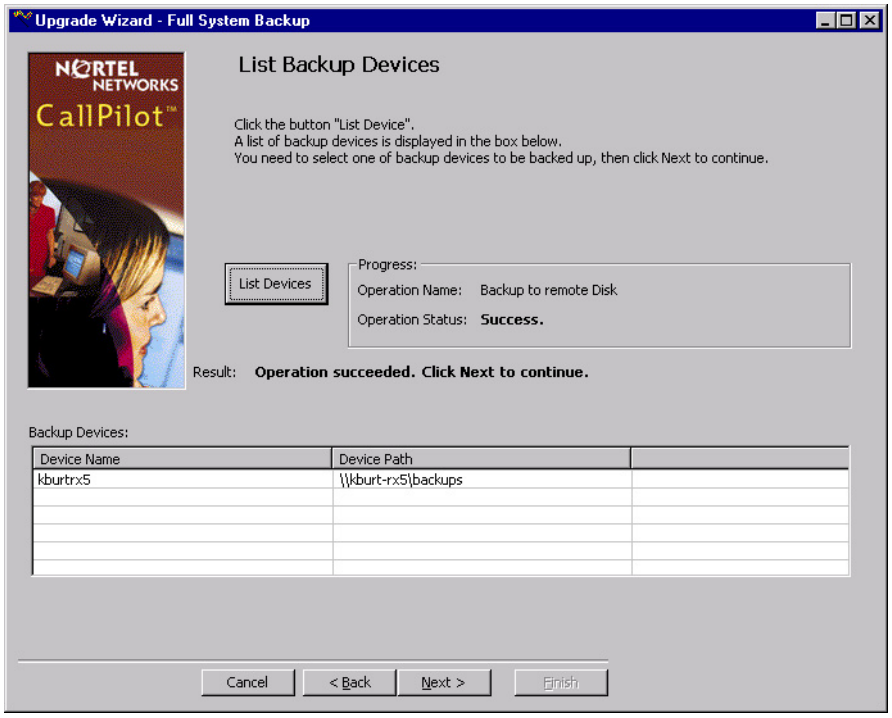
Click Next to choose the backup device. The Full System Backup - Select Backup Devices screen appears. Click List Devices.

Result: The screen displays the backup devices that are defined on your CallPilot server.

a. If no devices are listed, log in to CallPilot Manager and define your backup devices (System > Backup/Restore > Maintain > Configure backup devices). Click List Devices again. Select the backup device you want to use and click Next to start the backup.

b. If the list is populated, select the appropriate backup device and click Next to start the backup.

Figure 21: Full System Backup - List Backup Devices



Backing up your data

15 The Perform System Backup screen appears and the backup starts.

Figure 22: Full System Backup - Perform System Backup

16 A progress bar shows the percent complete and the status is displayed.

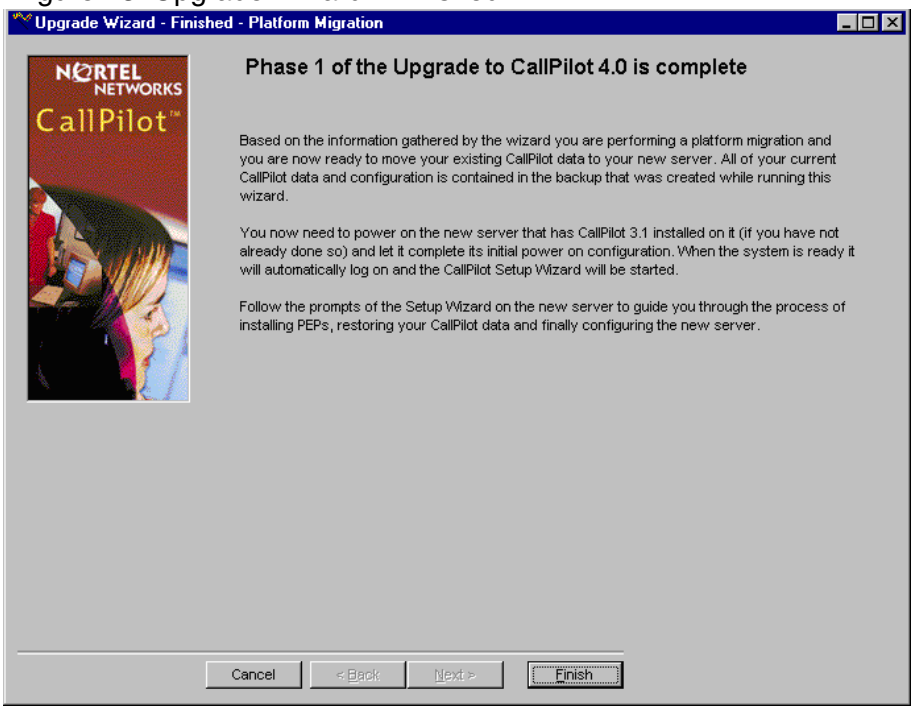
IF	THEN
there are errors	■ follow the displayed link and examine the log file for errors. ■ contact your distributor (channel partner) if you need assistance to resolve the errors. ■ click the Restart button to restart the backup process.
there are no errors	■ click Next.

17 Once the backup is complete, eject the tape from the tape drive.

18 Click Next.

Result: The Finished - Platform Migration screen displays.

Figure 23: Upgrade Wizard - Finished



19 Click Finish to close the upgrade wizard.

Result: The CallPilot system resources are available for normal call processing loads.

20 Replace your existing platform with a supported CallPilot server before proceeding to the next chapter.

- Refer to the CallPilot *Server Installation Guides* for instructions on installing the new server.

What's next?

You are now ready to restore your data on your new CallPilot server. For instructions, see Chapter 5 "Running the setup wizard" on page 81.

Chapter 6

Running the setup wizard

In this chapter

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Getting started

Overview of the restoration process

The setup wizard is only run on a CallPilot system containing a 4.0 software image. This can be either an existing system where a 4.0 image was installed as part of an upgrade, or a new system received from Nortel for platform migration. The setup wizard rechecks for platform and software validity, and then upgrades and restores your existing data. There are three main steps:

1. Install any new SU/PEPs.

   The setup wizard first prompts you to install any outstanding PEPs.

2. Check platform and software validity.

   The setup wizard checks the software and hardware components of your system to ensure that data can be safely restored from backup onto the server.

3. Restore your backed up data from the backup made by the Upgrade Wizard.

   After a successful system check, the setup wizard restores your data and then performs a database conversion.

ENSURE YOU USE THE BACKUP CREATED FROM THE UPGRADE WIZARD FOR THE FOLLOWING REASONS:

1. You will have the most current view of the system.

2. The Upgrade Wizard corrects the data prior to the backup. This ensures a clean backup and a smooth upgrade.

3. Using an earlier backup tape can result in issues encountered during the restore and upgrade process under CallPilot 4.0.

4. The backup from the upgrade wizard includes the upgrade wizard logs so that they are brought forward to CallPilot 4.0. These logs can be used by NETS in the rare event of an upgrade failure.

Assembling your tools

Assemble the tools required to set up the CallPilot 4.0 server.

- Recommended CallPilot 4.0 SUs and PEPs on CD.
- Backup from the upgrade wizard.

Running the setup wizard

Note: Windows 2003 uses plug and play. Ensure the modem is connected and powered-up before you power on the server.

When the server is powered on for the first time, a mini-setup process launches which consists of a number of reboots. When this process is completed, the Windows Logon Screen is displayed.

Starting the setup wizard

1. Log on to the CallPilot server when the Windows Server 2003 mini-setup process is completed. The default password for the Administrator, NGenSys, NGenDist, and NGenDesign accounts is set to **Bvw250**.
2. The setup wizard automatically launches if you log on to an unconfigured CallPilot server. A CallPilot server, freshly upgraded to CallPilot 4.0, is not configured. You can also launch the setup wizard manually by clicking Start > Programs > CallPilot > Setup Wizard.

   Result: The CallPilot Setup Wizard welcome screen appears. If you exit after a successful restore and before the setup wizard is finished, you have the option to continue or restart the setup wizard.

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

   a. Specify the IP address and subnet mask for the CLAN subnet. Do not change your computer name unless necessary.
   b. Specify the gateway for the CLAN subnet.
   c. Restart the system (if prompted by Windows).
   d. Log on to the CallPilot server. The default password for the Administrator, NGenSys, NGenDist and NGenDesign accounts is set to **Bvw250**.
   e. *If your backup is on a network drive*, map the network drive where the backup data is stored.
   f. Continue to the next step.

   If your backup is on tape, continue to the next step.
3. Read the information displayed on the screen and click Next.

Result: The Need SU/PEP Installation screen appears.

Installing SUs and PEPs

ATTENTION

If you downloaded PEPs, close the wizard, install the PEPs and restart if required. When the system is in service, restart the wizard and select "No" on the Installing SU/PEP screen. If your PEPs are on CD, continue with step 4.

4 If there are Service Updates (SUs) or PEPs available, you can choose to install them now. Select Yes or No and click Next.

- *If you choose Yes, install SU/PEPs:*

Result: The Installing SU/PEP screen appears.

a. Install all the required SUs and PEPs.

Note: Reboot (if required) after all the SUs and PEPs are installed.

b. Click Next to continue if no reboot was required. Otherwise, restart the server.

- *If you choose No, do not install SU/PEPs now:*

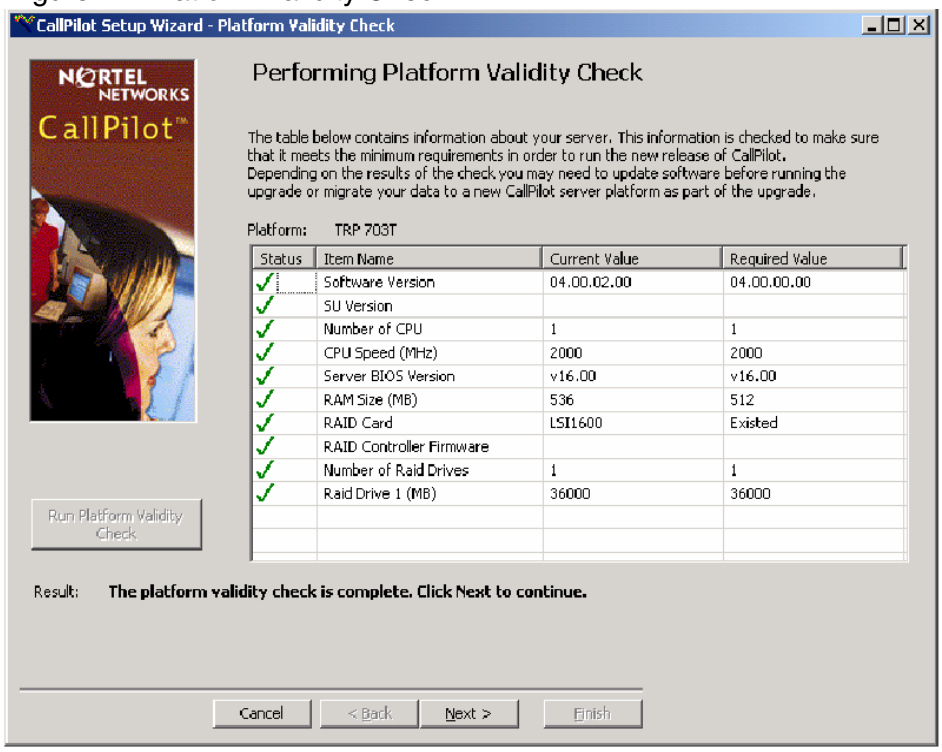
Result: The Platform Validity Check screen appears.

Rechecking the platform validity

5 View the items on the Platform Validity Check screen and click Next.

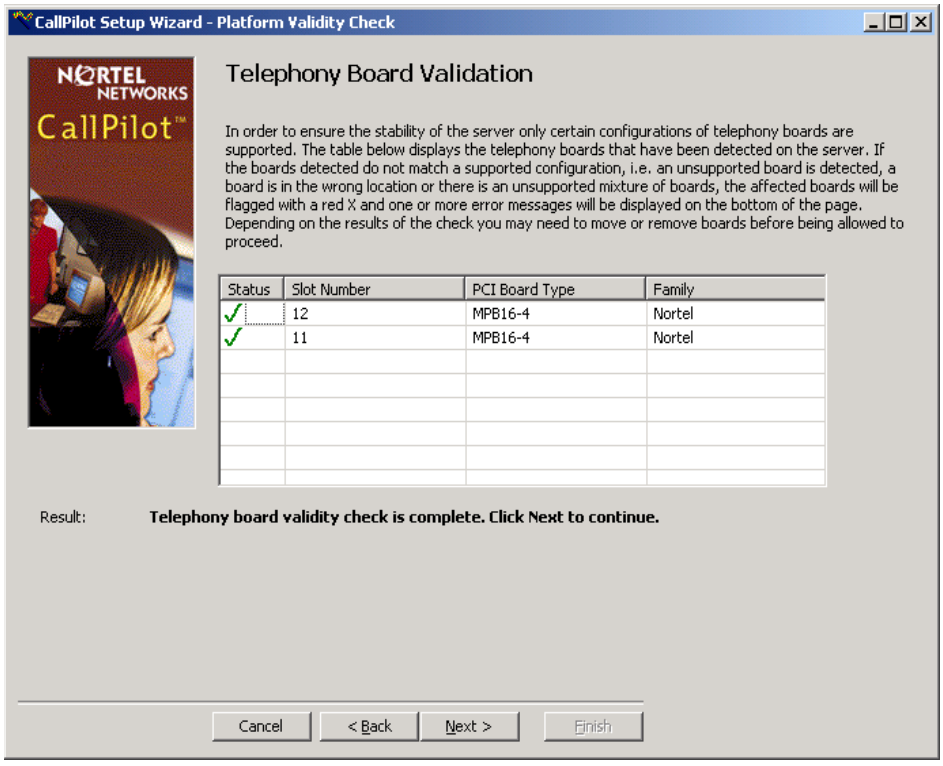
Note: If your server does not meet the minimum hardware and software requirements for the upgrade, contact your support organization.

Figure 24: Platform Validity Check



Result: The Telephony Board Check screen appears.

Figure 25: Telephony Board Validation screen



6 *If the system detects an error*, an error message will appear. You will not be able to continue with the setup wizard. Do the following:

a. Power off the system.

b. Install the boards in the correct locations.

c. Restart the system.

d. After logging into windows, restart the setup wizard.

e. Continue to the next step.

If your board configuration is correct, click next to continue to the next step.

Note: The following synchronization and disk space checks only pause for display if the checks fail. Results of the checks are written to the setup log.

7 The setup wizard checks if the computer name and database are synchronized.

IF they	THEN
are not synchronized	■ the Checking Computer Name screen appears. ■ Click Next to synchronize the names. **Note:** The system will automatically reboot after synchronizing the names. ■ When the system restarts, you must relaunch the setup wizard.
are synchronized	■ the setup wizard continues. **Note:** Results of the synchronization check are written to the setup wizard log.

8 The setup wizard performs a disk space check. There must be enough free disk space to restore your backed up data.

IF the disk	THEN
does not have enough free space	■ the Checking Free Disk Space screen appears. ■ you must free up space on the D: drive by removing unnecessary files. ■ follow the link on the screen and use the instructions to free up enough space, and then click Next ■ the wizard performs another check and if there is still not enough space the Checking Free Disk Space screen reappears. ■ If there still is not enough free disk space, exit the wizard and call your support organization.
has enough free space	■ the setup wizard continues **Note:** Results of the disk space check are written to the setup wizard log.

Restoring backed up data

Restore your backed up CallPilot data onto the upgraded CallPilot server.

ATTENTION

The data restoration takes from 1 to 3 hours to complete.

If you are running a 1002rp, the list to tape process takes up to 30 minutes.

Only use the backup created by the upgrade wizard.

9 On the Selecting Upgrade of the CallPilot screen, choose Yes to continue with the restore process. Do not choose no.

Result: The Restore Medium Selection screen appears.

10 Choose the medium on which your backup is stored.

If you choose to restore from disk:

Result: The Choose Remote Disk screen displays.

a. Find the remote disk to restore from and click on it.

b. Click Next to continue.

If you choose to restore from tape:

a. Make sure the tape is firmly in the tape drive and click Next. (If there is already a tape in the drive, remove it and re-insert it. Otherwise a tape list can take up to two hours).

Result: The List Backups screen appears.

b. Click List Backups to get a list of valid backups on your backup medium.

c. The available backups appear in the List of Backups table.

d. Select the backup that you want to use for the restore and click Next.

Result: The Perform Restore screen appears.

e. Read the information displayed on the Perform Restore screen and click Start Restore.

Result: CallPilot services are shut down and the wizard starts the restore operation. The progress bar shows the percent complete and the number of errors.

11 Determine if the restoration was successful.

IF the restoration	THEN
was not successful	■ review the log files. ■ Click Retry to start the restoration again. ■ If still not successful, contact your support organization.
was successful	■ click Next to continue.

Result: The Ready to Upgrade Database screen appears.

12 Click Next to start the database upgrade.

Result: The database upgrade starts and the Upgrading Data screen appears.

IF the database upgrade is	THEN
not successful	■ click Upgrade Database to try again. **Note:** If subsequent attempts at upgrading the database are not successful, then contact your support organization.
successful	■ the setup wizard continues.

13 Click Next to complete the setup wizard.

Result: The Finished screen appears.

14 Read the information displayed on the Finished screen and click Finish.

Result: A screen appears warning you that the system will automatically restart.

15 Click OK.

Result: The system restarts.

What's next?

You are now ready to configure your CallPilot system. For instructions, see "Configuring the CallPilot system" on page 91.

Chapter 7

Configuring the CallPilot system

In this chapter

Getting started 92

Running the configuration wizard 93

Getting started

Overview of the configuration process

Once the setup wizard has completed the process of restoring the data from backup, the CallPilot system is configured in several steps. Most of the settings have been restored from your backup and only need to be verified.

- validate your keycode
- set passwords
- verify hardware settings
- install languages
- verify network settings

Assembling your tools

Assemble the tools required to configure the CallPilot 4.0 server.

- CallPilot Languages CD
  Note: You will be prompted to reinstall languages during the configuration process.
- CallPilot server dongle ID (serial number) and CallPilot 4.0 keycode.

Running the configuration wizard

Note: CallPilot Manager and CallPilot Reporter on a stand-alone web server must be upgraded before proceeding. The required files are located on the application CD.

Logging in to CallPilot Manager

1. When the Windows log on screen appears, log on with the default password (Bvw250).
2. Launch Internet Explorer.

   Result: The Microsoft Windows Update webpage displays.
3. Click on the Home icon.

   Note: If the home icon does not bring up the CallPilot Manager login page, enter the url http://localhost/cpmgr.

   Result: The CallPilot Manager login webpage displays.
4. Run the configuration wizard after a successful upgrade and after the data has been restored. (The configuration wizard is accessed from the CallPilot Manager main screen.) The system launches the web browser and prompts you to log in to CallPilot Manager. Use your existing CallPilot login information.
   - Mailbox Number
   - Password
   - Server—specify the name or the IP address of the CallPilot server that you want to configure. (The server name may have changed during the upgrade or platform migration.)

   Note: When Internet Explorer is launched, you may see a box that says “M/S IE Enhanced Security config is currently enabled on your server. This advanced level of security reduces risk.” Nortel recommends that you do not lower the security level. Nortel also recommends that you do not select the check box to not show the message again. If you do lower the security level and you try to access a web site off the server, it may be blocked by the security setting. You will not receive a warning but a blank screen will appear.
5. Click Login.

   Result: The system may prompt you to change the password for the Administrator mailbox.

6 Type the default password, the new password, and then click Save.

Result: The main CallPilot Manager screen appears.

Figure 26: CallPilot Manager

7 Click the Configuration Wizard icon on the CallPilot Manager screen.

Tip: You can also start the configuration wizard by clicking Tools → Configuration Wizard.

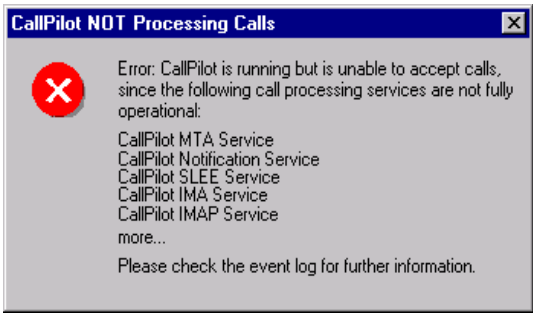
Result: A dialog box appears prompting you to choose either an express or standard setup. Select Standard.

8 Click OK.

Result: The Configuration Wizard: Welcome screen appears.

Note: Because the CallPilot system is not yet configured, the following error dialog box can appear while you are running the configuration wizard.

Figure 27: CallPilot NOT processing calls.



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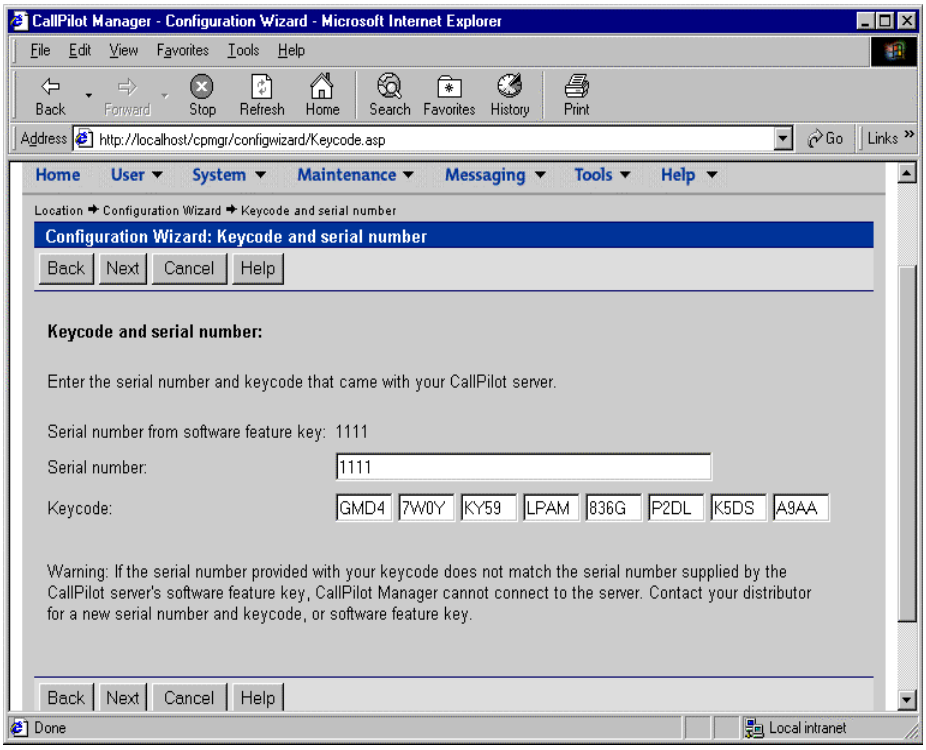
Disregard the error message, close the dialog box, and continue the configuration procedure.

Configuring Meridian 1/CS 1000 systems

9 Click Next on the Welcome screen.

Result: The Keycode and serial number screen appears. Enter your keycode and serial number.

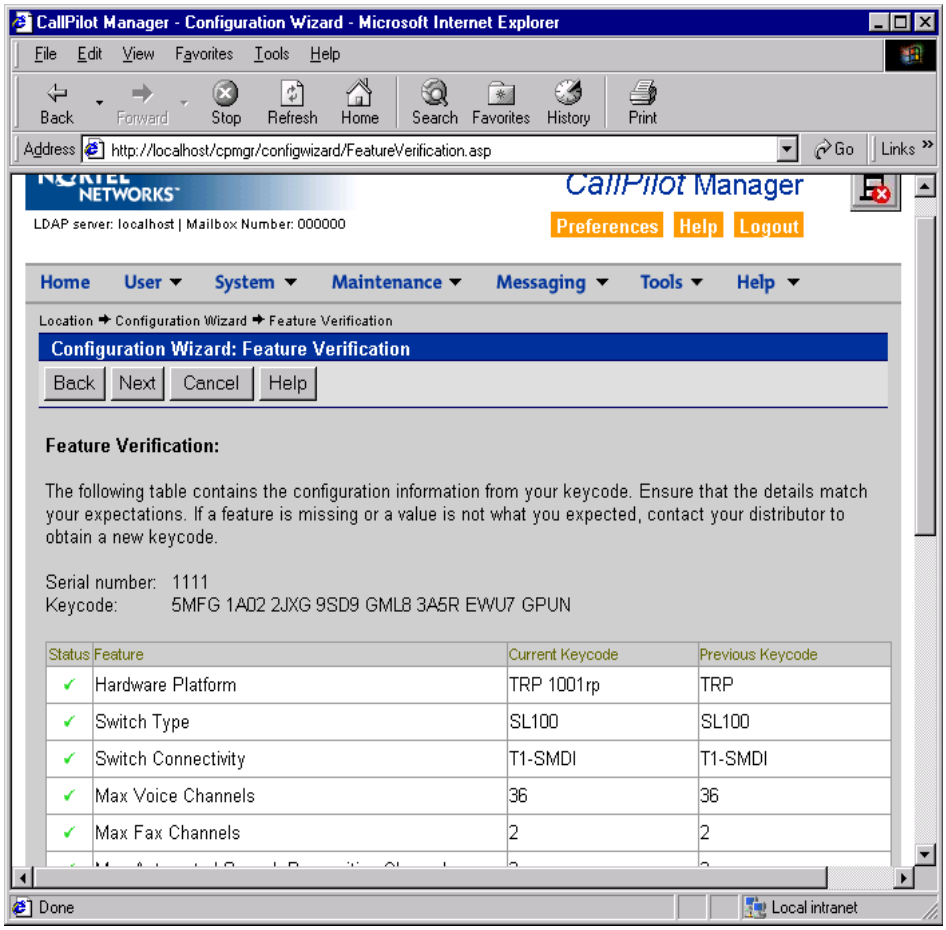
Figure 28: Keycode and serial number



10 Ensure that the serial number and keycode are correct for CallPilot 4.0, and then click Next.

Result: The Feature Verification screen appears

Figure 29: Feature Verification



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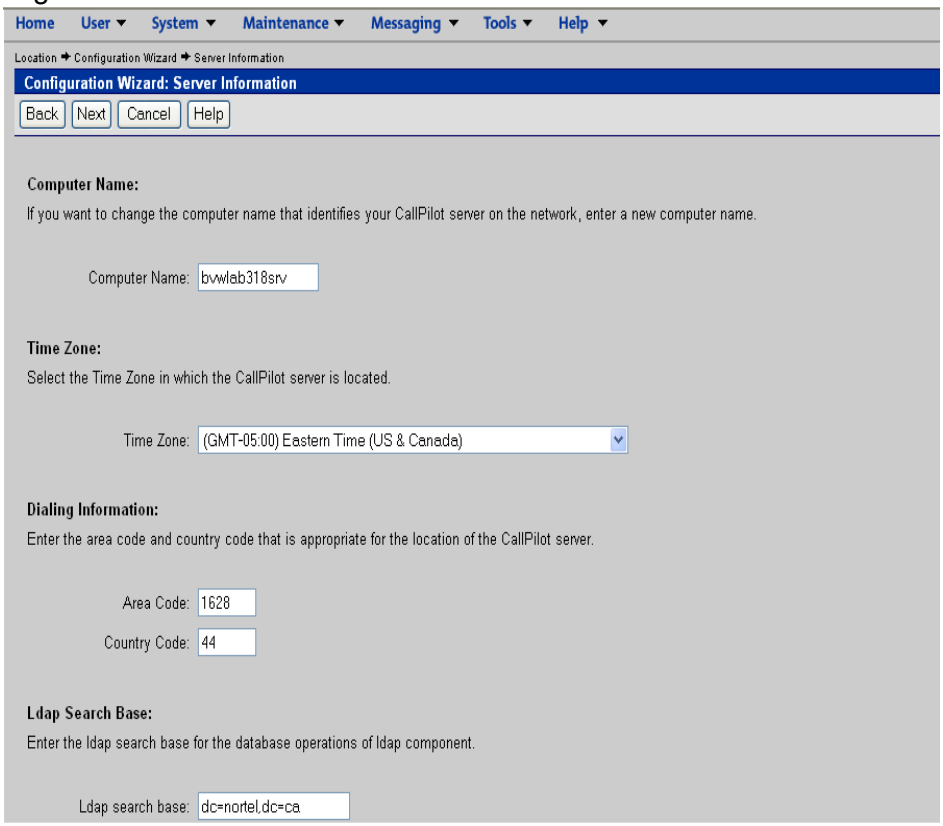
11 Ensure that the details on the screen match your expectations and click Next.

Note: If a feature is missing or is not what you expected, acquire a new keycode from your Nortel distributor.

Result: The Server Information screen appears.

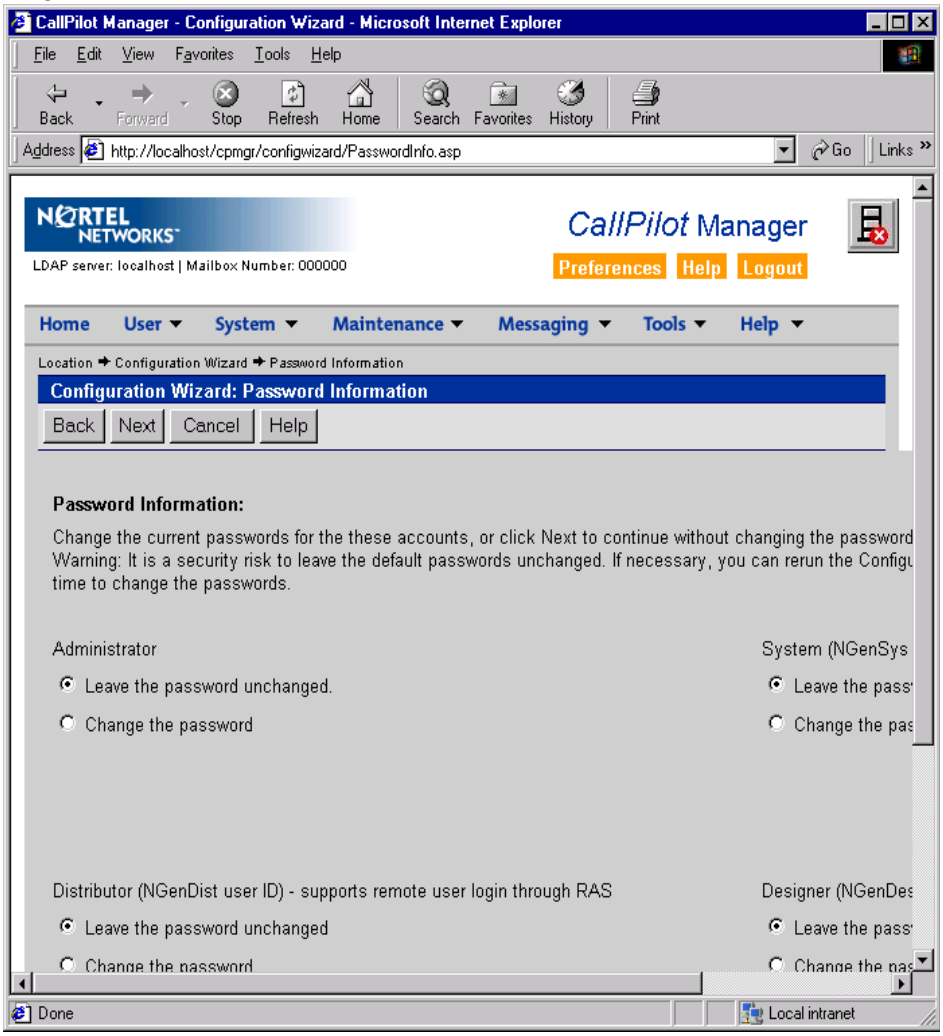
Figure 30: Server Information



12 Verify the information on the Server Information screen, modify it, if necessary, and then click Next.

Result: The Password Information screen appears

Figure 31: Password Information



g250027

Note: The Leave the password unchanged option buttons are not active. CallPilot no longer gives you the option to leave the passwords unchanged.

13 Change the default passwords to strong passwords.

Note: To set all the accounts to the same password, fill in the Administrator password and leave the rest blank. Press Next and OK to set the rest of the passwords.

14 Click Next in the Configuration Wizard: Password Information screen.

Result: The Multimedia Allocation screen appears.

15 Verify the number of MPB boards and, if applicable, DSP cards, and ensure that they match the hardware installed in the CallPilot server.

16 Change the port allocations as required.

17 Click Next on the Media Allocation screen.

Result: The Switch Information screen appears.

18 Ensure that the simplified message desktop interface (SMDI) transport data settings and the COM port settings are correct.

a. If you are on a CallPilot T1/SMDI system, ensure that the simplified message desktop interface (SMDI) transport data settings and the COM port settings are correct. If you are expanding the number of channels, configure the new channels from this screen.

Click Next when the channels have been configured.

Result: The Language Source Directory screen displays. Continue to the next step.

b. If you are on a CallPilot M1/CS1000 system, ensure the switch type and the switch IP addresses are correct. If you are expanding the number of channels, configure the new channels from this screen.

Click Next when the channels have been configured.

Result: The CDN information screen appears.

19 Verify the CDN configuration.

If you need to make changes, do the following:

a. Click New to add a new CDN.

Result: The system prompts you for the CDN and the name of the application to be dedicated to the CDN.

b. Specify the CDN, choose the application, and then click OK.

Result: The system returns you to the CDN Information page.

20 Click Next

Result: The Language Source Directory screen appears.

21 When the CallPilot 4.0 Image was installed on the server, all languages were removed. Use the Language Prompts CD to reinstall languages.

22 Put the Language Prompts CD in the DVD/CD-ROM drive and select the Install Language option button.

23 Enter the path to the language CD-ROM in the Language CD Location box and click Next.

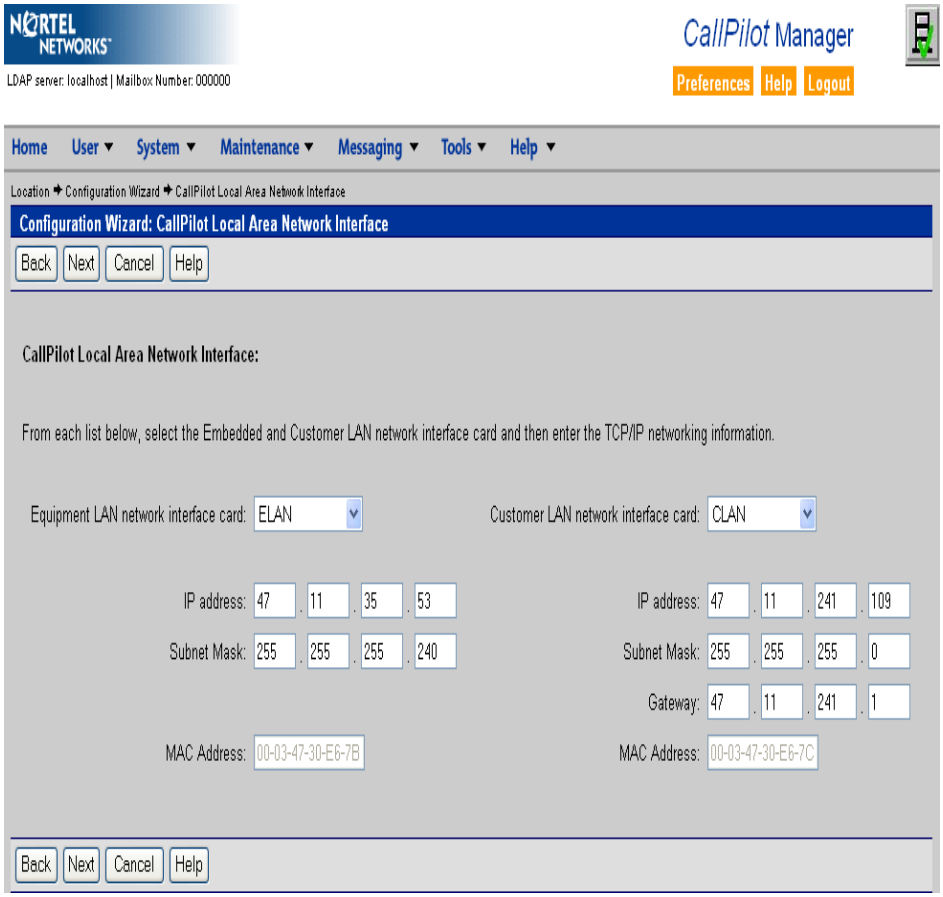
Result: The Language Installation screen appears.

24 Choose the languages that you want to install for the Prompts and Automated Speech Recognition options and the primary and secondary languages, and then click Next.

Note: If you want to install languages from more than one language CD-ROM, you must run the Configuration Wizard again after you complete this procedure. You can run the Configuration Wizard in Express Mode. The Express Mode allows you to access the Language Installation screen (or any other screen) directly, rather than proceed through each screen in the Configuration Wizard.

Result: The CallPilot Local Area Network Interface screen appears.

Figure 32: CallPilot Local Area Network Interface



25 Verify that the LAN configuration is correct.

Note: The T1/SMDI system does not have an Equipment Local Area Network (ELAN).

If you need to make changes:

a. Choose the card that has been assigned to the ELAN subnet (For M1/CS1000 systems only).

b. Specify the IP address and subnet mask for the CLAN subnet. (The IP address information can be found in the file: D:\Nortel\Data\IPCONFIGURATION.txt)

c. Repeat the steps for the ELAN subnet.

d. Specify the gateway for the CLAN subnet.

26 Click Next.

Result: The Ready to Configure screen appears.

27 Click Finish.

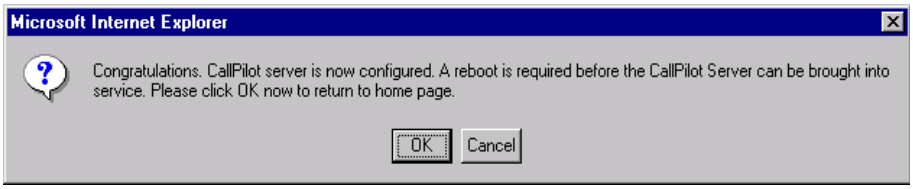
Result: A dialog box prompts you to confirm the configuration.

28 Click OK to configure CallPilot.

Result: The configuration is applied to the server. This task can take from 10 to 40 minutes to complete, depending on the number of languages installed and the number of programmed DSP cards. The Configuration Wizard displays progress information.

After the configuration has been applied to the server, a dialog box reminds you to reboot the server for the configuration to take effect

Figure 33: Congratulations dialog box



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29 Click OK on the dialog box.

Result: The system returns you to the main CallPilot Manager screen.

30 Log out of CallPilot Manager and close the web browser.

31 Restart the system.

What's next?

You are now ready to complete the final tasks. For instructions, see "Completing the process" on page 103.

Chapter 8

Completing the process

In this chapter

Entering network settings 104

Installing antivirus software 105

Applying Microsoft Security Updates 106

Starting the SNMP service 107

Testing the CallPilot system 108

Returning CallPilot to service 109

Entering network settings

Setting the network

After configuring CallPilot Manager, enter your network settings (DNS, WNS, and so on). The network information is preserved from the original system and is found at: D:\Nortel\Data\IPconfiguration.txt.

Setting the DNS

You must configure the Primary DNS suffix for the CallPilot Address Book to function properly.

1. Right-click on My Computer, and then click Properties.

   Result: The System Properties screen appears.
2. Select the Computer Name tab.
3. Click Change.
4. Click More.
5. Enter the Primary DNS Suffix for the CallPilot Server.
6. Configure the DNS information on the CLAN adapter.
7. Restart server.

Installing antivirus software

You must install antivirus software on the CallPilot server now. If you performed a platform migration, the antivirus software did not come installed on your new server. If you performed a platform upgrade, your antivirus software was removed when the CallPilot image was installed.

For more information about the anti-virus software packages that have been approved by Nortel for CallPilot, refer to the *CallPilot Support for AntiVirus Applications* bulletin.

Note: Once the anti-virus software is installed, reconnect the CLAN.

Applying Microsoft Security Updates

Download and apply the latest Nortel approved security and critical updates from Microsoft using the Start > Windows Update menu.

Installing an unapproved security update can cause serious problems with CallPilot performance. Before installing Microsoft security updates, check bulletin P-2005-0056-Global to ensure that they have been tested and approved by Nortel. This bulletin is located on the Partner Information Center (PIC) and http://www.nortel.com/support web sites.

Starting the SNMP service

When you updated the operating system for CallPilot 4.0, the Simple Network Management Protocol (SNMP) service was automatically disabled. As a result, SNMP alarms cannot be sent to the Network Management System (NMS).

If you are using SNMP in the CallPilot network, then you must configure and start the SNMP service to ensure that SNMP alarms are sent to the NMS.

Testing the CallPilot system

Putting the system into operation

1. Log on to Windows Server 2003 using an account with administrative privileges (for example, NGenDist).
2. Wait until the CallPilot in Full Service dialog box appears.

   This can take several minutes. Before the CallPilot in Full Service dialog box appears, you can see the CallPilot Booting or CallPilot NOT in Full Service dialog boxes.

   During the restart, a CallPilot Not Processing Calls dialog box can appear reporting an error.

   ```
   Error: CallPilot is running but is unable to accept calls,
   since the following services are not fully operational:
   (list). Please check the event log for further info.
   ```

   Ignore this message and wait for the CallPilot in Full Service dialog box that states

   ```
   CallPilot is running and able to accept calls.
   ```
3. Log on to the server with CallPilot Manager.
4. If channels were courtesy stopped before the upgrade, start them.
5. Click System > Service Directory Number, and then verify the service directory number (SDN) configuration.

Testing the CallPilot upgrade

For instructions on testing the CallPilot system operation, refer to the applicable NTPs:

- *T1/SMDI and CallPilot Server Configuration* (555-7101-224) guide.
- *Meridian 1 and CallPilot Server Configuration* (555-7101-222) guide.
- *Succession 1000 System and CallPilot Server Configuration* (555-7101-510) guide.

Returning CallPilot to service

If the upgrade was not successful:

Restoring CallPilot after a failed upgrade (RAID)

1. Reboot the CallPilot server.
2. Press Ctrl+M while the server is booting.

   Result: The RAID configuration utility opens.
3. Break the mirroring of the logical drives.
   a. Select Objects > Physical Drive.

      Note: All server drives on channel 1 must be online: two drives for the 703t and six drives for the 1002rp.
   b. Select CH1 ID0 (A01-01) and press Enter.
   c. Select Fail Drive and press Enter.
   d. Select Yes to confirm the fail action and press Enter.
   e. Repeat these steps for each remaining drive on channel 2: CH1 ID1 (A02-01) and CH1 ID2 (A03-01).

      Note: The 703t server has only one drive on channel 1. The 1002rp server has three drives on channel 1.
4. Bring the drives on channel 2 online (the drives on which the previous CallPilot release is installed).
   a. Select Objects > Physical Drive.
   b. Select CH2 ID0 (A01-02) and press Enter.
   c. Select Make Online and press Enter.
   d. Select Yes to confirm that the driver must be brought online and press Enter.
   e. Repeat these steps for each remaining drive on channel 2: CH2 ID1 (A02-02) and CH2 ID2 (A03-02).

      Note: The 703t server has only one drive on channel 2. The 1002rp server has three drives on channel 2.
5. Press Esc to return to the Objects menu.
6. Press Esc to return to the Management menu.
7. Press Esc to exit the RAID configuration utility.

   Result: A confirmation box appears.
8. Click Yes to confirm that you want to exit the RAID configuration utility and press Enter.
9. Press Ctrl+Alt+Delete to reboot the server.

If the upgrade was successful:

Resynchronizing the RAID hard drives

703t - resynchronizing RAID

1 Without shutting down the server, from Windows, click Start > Programs > MegaRAID Client.

Result: The MegaRAID Power Console Plus window appears.

2 In the Physical Devices section, right-click the Channel 2 hard disk drive marked failed.

Example: Channel-2 (0)A1-2-Failed.

3 From the pop-up menu select Rebuild.

Result: When the Rebuild is complete:

a. The drive status changes to online.

b. The color of the icon changes to green.

c. The alarm stops beeping unless it was temporarily silenced.

Note: The process can take up to 1 hour. Do not shut down the machine before the rebuild is complete. If you reboot or power down during this process, you must follow the instructions for “Restoring CallPilot after a failed upgrade (RAID)” on page 109.

4 Monitor the rebuild by opening the Windows MegaRAID console.

1002rp - resynchronizing RAID

1 Without shutting down the server, from Windows, click Start > Programs > MegaRAID Client.

Result: The MegaRAID Power Console Plus window appears.

2 Right-click the first drive on Channel 2.

Example: (0) A1-2-Failed.

3 From the pop-up menu, select Rebuild. When the rebuild is complete, repeat the process for the remaining two drives on Channel 2.

Result: When all three drives are rebuilt:

a. The status of all three drives changes to ONLINE.

b. The color of the icons changes to green.

c. The alarm stops beeping unless it was temporarily silenced.

Note: Depending on disk capacity, the process can take up to 2 hours. Do not shut down the machine before the rebuild is complete. If you reboot or power down during this process, you must follow the instructions for “Restoring CallPilot after a failed upgrade (RAID)” on page 109.

4 Monitor the rebuild by opening the Windows MegaRAID console.

Registering and activating Windows 2003

If you are upgrading a 703t from an earlier release of CallPilot to CallPilot 4.0, you may have to register and activate Windows 2003. In this case you will receive a warning message on your screen when booting up after the imaging process.

```
You have been Issued a Certificate of Authenticity (COA)
label with the Upgrade CDs. You will require this label for
the registration and activation process.
```

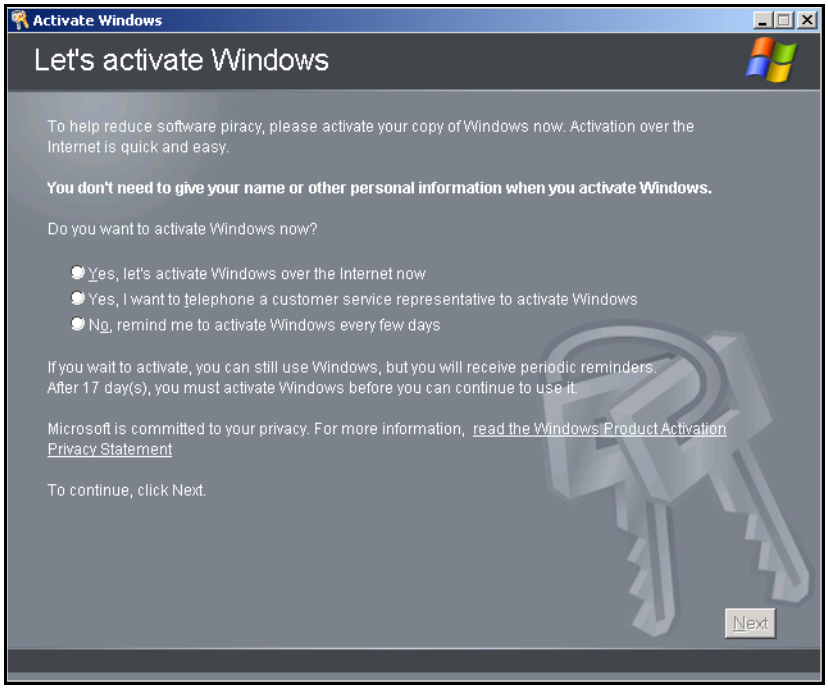
Register and activate Windows 2003

1 Double-click the Key icon at the lower right of the screen.

Figure 34: Key icon

Result: The Let's activate Windows screen appears.

Figure 35: Let's activate Windows screen



If you are connected to the Internet

1 Select Yes, let's activate Windows over the Internet now, and then click Next.

Result: The Register with Microsoft screen appears.

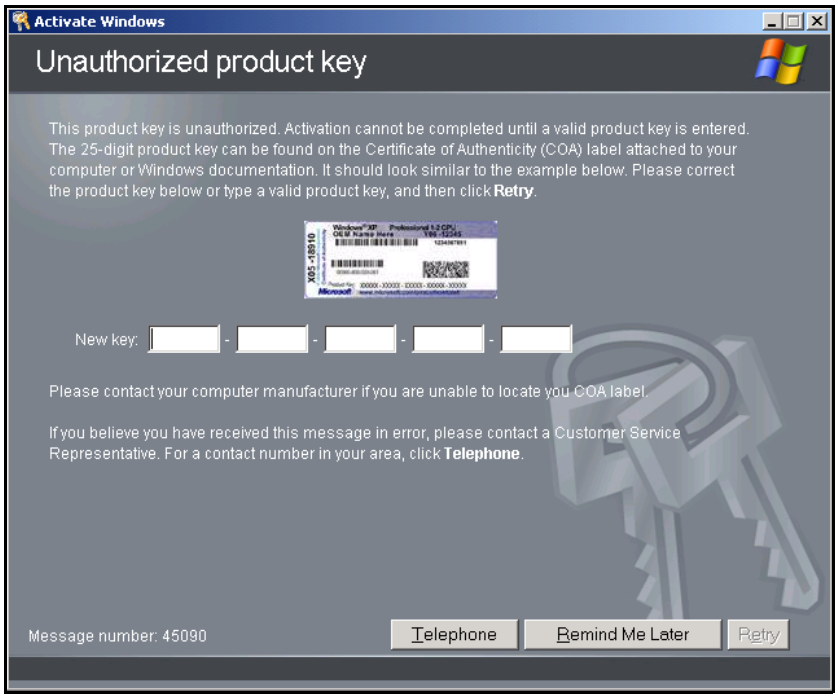
2 Select Yes, I want to register and activate Windows at the same time, and then click Next.

Result: The Collect Registration data screen appears.

3 Fill in the relevant information, and click Next.

Result: The Unauthorized product key screen appears.

Figure 36: Unauthorized product key screen



4 Enter the product key that appears on the label, and click Next.

Result: The Thank You screen appears.

5 Click OK.

Result: Your Windows 2003 is now registered and activated. You can continue with normal operation.

If you are not connected to the Internet

1 Select Yes, I want to telephone a customer service representative to activate Windows, and then click Next.

Result: The Activate Windows by phone screen appears.

Figure 37: Activate Windows by phone screen

2 Select the appropriate country in the drop-down box.

Result: The customer service phone numbers for your region appear on the screen.

3 Phone the customer service representative at one of the numbers.

Result: You will be asked to provide the installation ID that appears on the screen. You will then be given a confirmation ID.

4 Enter the confirmation ID in the boxes marked A to G, and then click Next.

Result: The Thank You screen appears.

5 Click OK.

Result: Your Windows 2003 is now registered and activated. You can continue with normal operation.

Upgrade and Platform Migration Guide

CallPilot
4.0

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