Stratagy®

Voice Processing Systems

Stratagy Flash, IVP8

Installation and Maintenance Manual

Stratagy Voice Processing

General End User Information

The Stratagy Voice Processing Systems are registered in accordance with the provisions of Part 68 of the Federal Communications Commission's Rules and Regulations.

FCC Requirements

Means of Connection: The Federal Communications Commission (FCC) has established rules which permit the Stratagy systems to be connected directly to the telephone network. Connection points are provided by the telephone company—connections for this type of customer-provided equipment will not be provided on coin lines. Connections to party lines are subject to state tariffs.

Incidence of Harm: If the system is malfunctioning, it may also be disrupting the telephone network. The system should be disconnected until the problem can be determined and repaired. If this is not done, the telephone company may temporarily disconnect service. If possible, they will notify you in advance, but, if advance notice is not practical, you will be notified as soon as possible. You will be informed of your right to file a complaint with the FCC.

Service or Repair: For service or repair, contact your local Toshiba telecommunications distributor. To obtain the nearest Toshiba telecommunications distributor in your area, call Toshiba America Information Systems, Inc., Telecommunication Systems Division in Irvine, CA (949) 583-3700.

Telephone Network Compatibility: The telephone company may make changes in its facilities, equipment, operations, and procedures. If such changes affect the compatibility or use of the Stratagy system, the telephone company will notify you in advance to give you an opportunity to maintain uninterrupted service.

Notification of Telephone Company: Before connecting a Stratagy system to the telephone network, the telephone company may request the following:

- Your telephone number.
- FCC registration number:
  Stratagy Flash: EBZUSA-25267-VM-T
  Stratagy IVP8: Tested to comply with FCC standards.
- **Ringer equivalence number:** 0.6B. The ringer equivalence number (REN) is useful to determine the quantity of devices which you may connect to your telephone line and still have all of those devices ring when your number is called. In most areas, but not all, the sum of the RENs of all devices connected to one line should not exceed five (5.0B). To be certain of the number of devices you may connect to your line, as determined by the REN, you should contact your local telephone company to ascertain the maximum REN for your calling area.
- **Network connection information USOC jack required:** RJ11C, RJ14C.

Radio Frequency Interference

Warning: This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer's instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

This system is listed with Underwriters Laboratory.

c UL us LISTED ITE 7B61

Stratagy Flash

c US E178305

Stratagy IVP8

Important Notice — Busy-hold Music

In accordance with U.S. Copyright Law, a license may be required from the American Society of Composers, Authors and Publishers, or other similar organization, if radio or TV broadcasts are transmitted through the busy-hold music feature of this voice processing system. Toshiba America Information Systems, Inc., hereby disclaims any liability arising out of the failure to obtain such a license.

Publication Information

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Further, Toshiba America Information Systems, Inc., Telecommunication Systems Division, also reserves the right, without prior notice, to make such changes in equipment design or components as engineering or manufacturing methods may warrant.

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Version A, June 2002

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Telecommunication Systems Division
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United States of America

TSD 081601

Toshiba America Information Systems, Inc.
Telecommunication Systems Division

Limited Warranty

Toshiba America Information Systems, Inc., ("TAIS") warrants that this voice processing equipment (except for fuses, lamps, and other consumables) will, upon delivery by TAIS or an authorized TAIS dealer to a retail customer in new condition, be free from defects in material and workmanship for twenty-four (24) months after delivery. This warranty is void (a) if the equipment is used under other than normal use and maintenance conditions, (b) if the equipment is modified or altered, unless the modification or alteration is expressly authorized by TAIS, (c) if the equipment is subject to abuse, neglect, lightning, electrical fault, or accident, (d) if the equipment is repaired by someone other than TAIS or an authorized TAIS dealer, (e) if the equipment's serial number is defaced or missing, or (f) if the equipment is installed or used in combination or in assembly with products not supplied by TAIS and which are not compatible or are of inferior quality, design, or performance.

Customer will, at its sole cost and expense, provide the necessary Uninterruptible Power Supply (UPS) equipment as specified by TAIS in the Stratagy ES General Description for use with the Stratagy ES system at all times. System failures and/or damages resulting from either not using a UPS with the Stratagy ES or the use of a UPS not equivalent to that specified by TAIS are not covered by this warranty.

The sole obligation of TAIS or Toshiba Corporation under this warranty, or under any other legal obligation with respect to the equipment, is the repair or replacement by TAIS or its authorized dealer of such defective or missing parts as are causing the malfunction with new or refurbished parts (at their option). If TAIS or one of its authorized dealers does not replace or repair such parts, the retail customer's sole remedy will be a refund of the price charged by TAIS to its dealers for such parts as are proven to be defective, and which are returned to TAIS through one of its authorized dealers within the warranty period and no later than thirty (30) days after such malfunction, whichever first occurs.

Under no circumstances will the retail customer or any user or dealer or other person be entitled to any direct, special, indirect, consequential, or exemplary damages, for breach of contract, tort, or otherwise. Under no circumstances will any such person be entitled to any sum greater than the purchase price paid for the item of equipment that is malfunctioning.

To obtain service under this warranty, the retail customer must bring the malfunction of the machine to the attention of one of TAIS' authorized dealers within the twenty-four (24) month period and no later than thirty (30) days after such malfunction, whichever first occurs. Failure to bring the malfunction to the attention of an authorized TAIS dealer within the prescribed time results in the customer being not entitled to warranty service.

THERE ARE NO OTHER WARRANTIES FROM EITHER TOSHIBA AMERICA INFORMATION SYSTEMS, INC., OR TOSHIBA CORPORATION WHICH EXTEND BEYOND THE FACE OF THIS WARRANTY. ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND FITNESS FOR USE, ARE EXCLUDED.

No TAIS dealer and no person other than an officer of TAIS may extend or modify this warranty. No such modification or extension is effective unless it is in writing and signed by the vice president and general manager, Telecommunication Systems Division.

Before You Install Stratagy Flash with Strata CTX...

please read and complete both sides of this checklist.

This checklist only highlights important installation information. Please reference the *Stratagy Installation & Maintenance Manual* for details on programming individual features, etc.

CAUTION! **After making any significant program changes to the Stratagy, it is recommended the system be properly shut down and restarted. This copies the most current database to the C:\Stratagy\Archive\Good directory for use by the Automatic System Recovery feature (see "Automatic System Recovery" on page 5-10 in the *Stratagy Installation & Maintenance Manual*). Failure to do so could result in the loss of customer information if the system loses power before it is properly shutdown and rebooted.**

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1 Handling the Flash Voice Processing System

Do not attempt to open the Flash enclosure. There are no field-serviceable parts inside. ***Opening the Flash system voids the warranty.***

- ❒ Check the items contained in the package against the packing list. In addition to the hardware components, you receive a copy of the *Stratagy Flash Wall-Mounting Template and Instructions.*
- ❒ Inspect all equipment for damage. If equipment is missing or damaged, contact the shipping company or your dealer sales specialist immediately.
- ❒ Save the original shipping box for re-use when transporting system hardware. The original packing material has been specifically designed to offer the Flash system maximum protection.

2 Power Considerations

- ❒ Always connect the Flash system to a dedicated 110VAC outlet.
- ❒ If your Flash installation is in an area with unreliable power, you should also install a Power Conditioner to avoid any failures that can be caused by power fluctuations, including hardware failure and file corruption. A Toshiba recommended ONEAC™ Model ON400 (400 VA, 1/2 hour) Uninterruptible Power Supply (UPS) with Power Conditioner and Ground Bar is available (Part Number: ON400XRA-G0).

3 System Administration

Stratagy Admin Release 3 software is only supported by the Flash and cannot be used with any Release 2 Stratagy systems.

- ❒ **Telephone Administration** is available on Flash systems. A special System Administrator User ID mailbox (User ID 999) can be used by the System Administrators to add, delete and reset user mailboxes, add user names to the directory, reset security codes on user mailboxes, change the time on the Stratagy system and record the system announcement and busy music.
- ❒ **Local Administration** on the Flash requires a portable or desktop PC with MS DOS® 6.2, Stratagy Admin software, 5MB available hard disk space, a 3.5" 1.44 floppy disk drive and 580KB free RAM. You'll also need a 9-pin null-modem serial cable or Toshiba SG-ADMCBL cable to connect your PC to the Flash.

  Note In order to maintain Flash system integrity, customer-supplied anti-virus software should be resident and active on any PC that is connected to the Flash system. Refer to Stratagy Technical Bulletin TB40-0017 for further information.

- ❒ **Remote Administration** on the Flash system requires an external modem be connected to the Flash's COM 2 port. (See the *Stratagy Installation & Maintenance Manual* for installation details.)

4 Is the Strata CTX ready?

Flash is compatible with all Strata CTXs. Strata CTX needs to recognize Flash's DTMF signaling. An ARCS card must be installed in the Strata CTX100 for this DTMF signaling. Strata CTX670 allows four DTMF circuits in its default configuration.

- ❒ Install and program an ARCS card in the Strata CTX100. When installed, the ARCS card by default allows four circuits. Additional licenses may be required, depending upon the Strata CTX configuration and applications.
- ❒ Program slot in Strata CTX **before** installing the Stratagy. Refer to *Strata CTX Programming Manual* for details.

5 SMDI Considerations

SMDI is required for the Call Record feature with Stratagy Release 3.3. The Strata CTX must have a BSIS card.

- ❒ Install and program serial card BSIS in the Strata CTX. Refer to the *Strata CTX Programming Manual*.
- ❒ A serial cable must be installed between the BSIS card and the Stratagy. Toshiba's PPTC-9 (with six-conductor line-cord) is recommended.
- ❒ Stratagy's serial Port 1 is reserved for SMDI communication.

6 Just a Few More Things...

- ❒ Be sure to change the security code of the Shutdown Mailbox User ID 993. See the *Stratagy Installation & Maintenance Manual* for details.
- ❒ When using an internal modem in the Stratagy Admin PC, remember that Stratagy Admin does not work with the COM 3 or 4 port.
- ❒ Toshiba suggests that you do not write over the Stratagy Admin directory when installing a newer version of Stratagy Admin. Always retain previous versions of the Stratagy Admin software for use with other Flash systems.
- ❒ Make sure you have your *Stratagy I&M Manual* and *Strata CTX I&M* and *Programming Manuals* on hand for the installation. **Be sure to read the instructions before installing the system.**
- ❒ Remember to back up your database after installation.
- ❒ Remember to effectively update the Automatic System Recovery feature, you must shutdown and restart the Flash after making important programming changes.

If you have read and completed this checklist, installation will be a breeze!

OK, let's get started!

Before You Install Stratagy Flash with Strata DK...

please read and complete both sides of this checklist.

This checklist only highlights important installation information. Please reference the *Stratagy Installation & Maintenance Manual* for details on programming individual features, etc.

CAUTION! **After making any significant program changes to the Stratagy, it is recommended the system be properly shut down and restarted. This copies the most current database to the C:\Stratagy\Archive\Good directory for use by the Automatic System Recovery feature (see "Automatic System Recovery" on page 5-10 in the *Stratagy Installation & Maintenance Manual*). Failure to do so could result in the loss of customer information if the system loses power before it is properly shutdown and rebooted.**

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1 Handling the Flash Voice Processing System

Do not attempt to open the Flash enclosure. There are no field-serviceable parts inside. ***Opening the Flash system voids the warranty****.*

- ❒ Check the items contained in the package against the packing list. In addition to the hardware components, you receive a copy of the *Stratagy Flash Wall-Mounting Template and Instructions.*
- ❒ Inspect all equipment for damage. If equipment is missing or damaged, contact the shipping company or your dealer sales specialist immediately.
- ❒ Save the original shipping box for re-use when transporting system hardware. The original packing material has been specifically designed to offer the Flash system maximum protection.

2 Power Considerations

- ❒ Always connect the Flash system to a dedicated 110VAC outlet.
- ❒ If your Flash installation is in an area with unreliable power, you should also install a Power Conditioner to avoid any failures that can be caused by power fluctuations, including hardware failure and file corruption. A Toshiba recommended ONEAC™ Model ON400 (400 VA, 1/2 hour) Uninterruptible Power Supply (UPS) with Power Conditioner and Ground Bar is available (Part Number: ON400XRA-G0).

3 System Administration

Stratagy Admin Release 3 software is only supported by the Flash and cannot be used with any Release 2 Stratagy systems.

- ❒ **Telephone Administration** is available on Flash systems. A special System Administrator User ID mailbox (User ID 999) can be used by the System Administrators to add, delete and reset user mailboxes, add user names to the directory, reset security codes on user mailboxes, change the time on the Stratagy system and record the system announcement and busy music.
- ❒ **Local Administration** on the Flash requires a portable or desktop PC with MS DOS® 6.2, Stratagy Admin software, 5MB available hard disk space, a 3.5" 1.44 floppy disk drive and 580KB free RAM. You'll also need a 9-pin null-modem serial cable or Toshiba SG-ADMCBL cable to connect your PC to the Flash.

  Note In order to maintain Flash system integrity, customer-supplied anti-virus software should be resident and active on any PC that is connected to the Flash system. Refer to Stratagy Technical Bulletin TB40-0017 for further information.

- ❒ **Remote Administration** on the Flash system requires an external modem be connected to the Flash's COM 2 port. (See the *Stratagy Installation & Maintenance Manual* for installation details.)

4 Telephone System Configuration

The Flash Voice Processing system works with all Strata® DK280/DK424/DK424i, DK40i/DK40/DK16e/DK16, DK14/DK8 and DK24/DK56/DK96 (Release 4) systems.

- ❒ Make sure there are enough single line (analog) station ports on the Strata DK to support the number of Flash ports required.
- ❒ Strata DK needs to recognize the Flash's DTMF signaling. Make sure an RRCS is installed on the DK424i/DK424/DK280 RCTU, a K5RCU, K5RCU2 or K4RCU3 in the DK40i/DK40/DK16e/DK16, or CRCU in the DK24/DK56/DK96.
- ❒ Run Program 03 and assign these code(s) where the DTMF receiver is installed:

DK424i/DK424/DK280	DK40i/DK40/DK16e/DK16	DK24/DK56/DK96
Code 92, 93, or 94 for slot 00	Code 92 for slot 00	Code 92 or 93

Note When DK14/DK8 is powered on, Program 03 automatically assigns the correct code for the QRCU.

5 SMDI Considerations

We recommend Simplified Message Desk Interface (SMDI) integration for optimum performance of both the Stratagy and Strata systems.

- ❒ The Strata DK telephone system must be equipped with a PIOU/PIOUS, RSSU, or RSIU/RSIS card for SMDI integration.
- ❒ **Strata DK280/DK424/DK424i:** SMDI is available on all processors. The A processor must have Release 3.1 software or higher.
- ❒ Set code 43 in Program 03 for PIOU/PIOUS/RSSU or code 49 for RSIU/RSIS.
- ❒ A serial cable must be installed between the PIOU/PIOUS/RSSU/RSIU card and the Flash. Toshiba's PPTC-9 (with six-conductor line cord) is recommended.
- ❒ Refer to the *Stratagy I&M Manual* for complete instructions on configuring Stratagy Voice Processing systems for SMDI integration.

6 Just a Few More Things...

- ❒ Be sure to change the security code of the Shutdown Mailbox User ID 983. See the *Stratagy Installation & Maintenance Manual* for details.
- ❒ When using an internal modem in the Stratagy Admin PC, remember that Stratagy Admin does not work with the COM 3 or 4 port.
- ❒ Toshiba suggests that you do not write over the Stratagy Admin directory when installing a newer version of Stratagy Admin. Always retain previous versions of the Stratagy Admin software for use with other Flash systems.
- ❒ Make sure you have your *Stratagy I&M Manual* and *Strata DK I&M* and *Programming Manuals* on hand for the installation. **Be sure to read the instructions before installing the system.**
- ❒ Remember to back up your database after installation.
- ❒ Remember to effectively update the Automatic System Recovery feature, you must shut down and restart the Flash after making important programming changes.

If you have read and completed this checklist, installation will be a breeze!

OK, let's get started!

Before You Install Stratagy IVP8 in Strata CTX...

please read and complete both sides of this checklist.

This checklist only highlights important installation information. Please reference the *Stratagy Installation & Maintenance Manual* for details on programming individual features, etc.

CAUTION! **After making any significant program changes to the Stratagy, it is recommended the system be properly shut down and restarted. This copies the most current database to the C:\Stratagy\Archive\Good directory for use by the Automatic System Recovery feature (see "Automatic System Recovery" on page 5-10 in the *Stratagy Installation & Maintenance Manual*). Failure to do so could result in the loss of customer information if the system loses power before it is properly shutdown and rebooted.**

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1 Are you aware of the prescribed handling precautions for the Stratagy?

*Whenever handling Stratagy, always wear the **anti-static wrist strap** (included); keep the strap by the unit.*

- ❒ **Always hold the unit by its edges.** Remember that an electrostatic charge from your body, even your own body oils can damage the Stratagy.
- ❒ **Never drop or jar the Stratagy!** Care should be taken whenever handling the unit.
- ❒ Temperature changes greater than 20°F cause condensation on Stratagy's flash drive. If there is such a temperature variation, wait 24 hours before installation.
- ❒ Always keep the Stratagy in its individual shipping box until it's time to install it in the Strata CTX.
- ❒ Never transport the Stratagy inside the Strata CTX.

2 Do you have everything you need for programming Stratagy using Stratagy Admin?

Stratagy Admin Release 3 software is only supported with the Flash and IVP8. Use with any Release 2 Stratagy system may cause erratic behavior.

- ❒ **Local Administration?** You'll need a PC, 5MB hard drive space, 3.5" 1.44 floppy drive, and 580KB free RAM. You'll also need a 9-pin null-modem serial cable or Toshiba's SG-ADMCBL cable to connect your PC to the Stratagy.
- ❒ **Remote (modem) Administration?** Use Stratagy Admin software with Stratagy's internal (soft) 2400-baud modem. No additional equipment is necessary.
  ...or use Toshiba's 9600 baud SG-FMOD modem or a Hayes-compatible, 14.4 baud, V32.bis modem connected to Stratagy's serial Port 2. You'll need a customer-supplied 9-pin serial cable.

3 Is the Strata CTX ready?

Stratagy is compatible with all Strata CTXs. Strata CTX needs to recognize Stratagy's DTMF signaling. An ARCS card must be installed in the Strata CTX100 for this DTMF signaling. Strata CTX670 allows four DTMF circuits in its default configuration.

- ❒ Install and program an ARCS card in the Strata CTX100. When installed, the ARCS card by default allows four circuits. Additional licenses may be required, depending upon the Strata CTX configuration and applications.
- ❒ Program slot in Strata CTX **before** installing the Stratagy. Refer to *Strata CTX Programming Manual* for details.

4 Do you want to activate the DSS/Busy Lamp feature?

PDKU/BDKU cards must be installed and programmed for a DSS Console.

- ❒ Install and program the PDKU/BDKU in the Strata CTX.
- ❒ Refer to the *Strata CTX Programming Manual* for DSS programming.
- ❒ Set the *dss_active* parameter to TRUE.
- ❒ Configure the *DSS Port* field on the User Menu – Options screen for each mailbox.

5 Are you going to have SMDI?

SMDI is required for the Call Record feature with Stratagy Release 3.3/IVP8. A BSIS card must be located close to the Stratagy.

- ❒ Install and program serial card BSIS in the Strata CTX. Refer to the *Strata CTX Programming Manual*.
- ❒ A serial cable must be installed between the BSIS card and the Stratagy. Toshiba's PPTC-9 (with six-conductor line-cord) is recommended.
- ❒ Stratagy's serial Port 1 is reserved for SMDI communication.

6 Want to synch. Stratagy system time with Strata CTX?

SMDI is required if the Stratagy is going to be synched with the Strata CTX system time. Night Transfer Alternate Routing and Busy Station Identification do not require SMDI.

- ❒ For clock synch, you must configure the *ksu_time* parameter and connect SMDI.
- ❒ For Night Transfer Alternate Routing and Busy Station Identification, you must configure the *console_slot_ID* and *DSS_active* parameters.

7 All set? Just a few more things...

- ❒ Be sure to change the default password of the Shutdown Mailbox User ID 983 (see the *Stratagy Installation & Maintenance Manual*).
- ❒ Don't forget to wear the **anti-static wrist strap** during handling.
- ❒ When using an internal modem in the Stratagy Admin PC, remember that Stratagy Admin **does not** work with COM 3 or 4. Do not write over the Stratagy Admin subdirectory on your remote PC when installing the newer version of Stratagy Admin. Always retain previous versions of Admin.
- ❒ Make sure your *Strata I&M/Programming Manuals and Stratagy I&M Manuals* are handy. **Be sure to read the entire instructions before installing.**
- ❒ Remember to back up your database after installation.

If you have read and completed this checklist, installation will be a breeze!

OK, let's get started!

Before You Install Stratagy IVP8 in Strata DK...

please read and complete both sides of this checklist.

This checklist only highlights important installation information. Please reference the *Stratagy Installation & Maintenance Manual* for details on programming individual features, etc.

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1 Are you aware of the prescribed handling precautions for the Stratagy?

*Whenever handling Stratagy, always wear the **anti-static wrist strap** (included); keep the strap by the unit.*

- ❒ **Always hold the unit by its edges.** Remember that an electrostatic charge from your body, even your own body oils can damage the Stratagy.
- ❒ **Never drop or jar the Stratagy!** Care should be taken whenever handling the unit.
- ❒ Temperature changes greater than 20°F cause condensation on Stratagy's flash drive. If there is such a temperature variation, wait 24 hours before installation.
- ❒ Always keep the Stratagy in its individual shipping box until it's time to install it in the Strata DK.
- ❒ Never transport the Stratagy inside the Strata DK.

2 Do you have everything you need for programming Stratagy using Stratagy Admin?

Stratagy Admin Release 3 software is only supported with the Flash and IVP8. Use with any Release 2 Stratagy system may cause erratic behavior.

- ❒ **Local Administration?** You'll need a PC, 5MB hard drive space, 3.5" 1.44 floppy drive, and 580KB free RAM. You'll also need a 9-pin null-modem serial cable or Toshiba's SG-ADMCBL cable to connect your PC to the Stratagy.
- ❒ **Remote (modem) Administration?** Use Stratagy Admin software with Stratagy's internal (soft) 2400-baud modem. No additional equipment is necessary.
  ...or use Toshiba's 9600 baud SG-FMOD modem or a Hayes-compatible, 14.4 baud, V32.bis modem connected to Stratagy's serial Port 2. You'll need a customer-supplied 9-pin serial cable.

3 Is the Strata DK ready?

Make sure Stratagy is compatible with your Strata DK. It works with Strata DK424i/DK424/DK280 and DK40i/DK40/DK16e/DK16 systems and DK24/DK56/DK96 with Release 4 software.

- ❒ Always program Strata DK slot assignments **before** installing the Stratagy. Use these slot assignments:

DK424i/DK424	DK280 (R3 or Higher)	DK40i/DK40/DK16e/DK16	DK24/DK56/DK96
Use a universal slot, starting with slot 12 or 13 (if an RSIU is in slot 11); never use slots 27, 28, 31, 37, 38, 47, 48, 51, 57, 58, 67, 68, 71, 77, or 78.	Use any universal slot, starting with slot 12 (if a PDKU or PEKU is in slot 11) or slot 13 (if an RSIU is in slot 11); never use slots 31 or 51.	Use any expansion cabinet slot that takes an eight-port card **(except slot 18 in the DK40i/DK40/DK16e)**.	Use any slot after slot 01.

- ❒ Be sure to set the correct code in Strata DK programming for the slot where Stratagy is installed.
- ❒ Always remember to **shut down** Stratagy software **before** powering down Strata DK (see the *Stratagy Installation & Maintenance Manual*).

4 Is Strata DK's DTMF tone detection enabled?

Strata DK needs to recognize Stratagy's DTMF signaling.

- ❒ Make sure an RRCS is installed on the DK424i/DK424/DK280 RCTU, a K5RCU, K5RCU2 or K4RCU3 in the DK40i/DK40/DK16e/DK16, or CRCU in the DK24/DK56/DK96.
- ❒ Run Program 03 and assign these code(s) where the DTMF receiver is installed:

DK424i/DK424/280	DK40i/DK40/DK16e/DK16	DK24/DK56/DK96
Code 92, 93, or 94 for slot 00	Code 92 for slot 00	Code 92 or 93

5 Do you want to activate the DSS/Busy Lamp feature?

A PDKU card must be installed that is programmed for a DSS Console.

- ❒ Install and program the PDKU:

  DK424i/DK424/DK280: When installing the Stratagy in an odd-numbered cabinet, make sure the PDKU is in a lower-numbered slot in the same cabinet. When installing in an even-numbered cabinet, the PDKU must be in a lower-numbered slot in the preceding odd-numbered cabinet.
  DK40i/DK40/DK16e: set slot 11 in the Base Cabinet to code 64.
  DK24/DK56/DK96: the PDKU must reside in slot 01.
- ❒ Set code 64 using Program 03 for the PDKU slot.
- ❒ Set the *dss_active* parameter to TRUE.
- ❒ Configure the *DSS Port* field on the User Menu – Options screen for each mailbox.

6 Are you going to have SMDI?

A PIOU/PIOUS, RSSU, or RSIU/RSIS card must be located close to the Stratagy.

- ❒ **Strata DK424i/DK424/DK280:** SMDI is available on all processors. The A processor must have Release 3.1 software or higher.
- ❒ Set code 43 in Program 03 for PIOU/PIOUS/RSSU or code 49 for RSIU/RSIS.
- ❒ A serial cable must be installed between the PIOU/PIOUS/RSSU/RSIU card and the Stratagy. Toshiba's PPTC-9 (with six-conductor line cord) is recommended.
- ❒ Stratagy's serial Port 1 is reserved for SMDI communication.

7 Want to synch. Stratagy system time with Strata DK?

You'll need an LCD telephone physically installed on the first port of the Strata DK's PDKU card (see Step 5) card. It is important that the phone's LCD always displays the system time. For this to happen, no other LCD features, including MW Indication, can be enabled on this phone.

- ❒ You must configure the *ksu_time* and *console_slot_id* parameters.
- ❒ The Strata DK uses a 24-hour system clock, but does not notate a.m./p.m. on the LCD display. Because of this, during the initial installation or when the system has been shut down for any extended time, it is necessary to program the correct date and time in the Stratagy Main Menu, Date/Time function or via Admin mailbox.

8 All set? Just a few more things...

- ❒ Be sure to change the default password of the Shutdown Mailbox User ID 983 (see the *Stratagy Installation & Maintenance Manual*).
- ❒ Don't forget to wear the **anti-static wrist strap** during handling.
- ❒ When using an internal modem in the Stratagy Admin PC, remember that Stratagy Admin **does not** work with COM 3 or 4. Do not write over the Stratagy Admin subdirectory on your remote PC when installing the newer version of Stratagy Admin. Always retain previous versions of Admin.
- ❒ Make sure your *Strata I&M/Programming Manuals and Stratagy R3 I&M Manuals* are handy. **Be sure to read the entire instructions before installing.**
- ❒ Remember to back up your database after installation.

If you have read and completed this checklist, installation will be a breeze!

OK, let's get started!

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Chapter 3 – Access and Use Stratagy

Chapter 4 – Configure Stratagy

Chapter 5 – How Stratagy Operates

Chapter 6 – Menus

Chapter 7 – Token Programming

Chapter 8 – Customization Examples

Chapter 9 – AMIS Networking

Chapter 10 – System Reports

Chapter 11 – Maintenance, Upgrades and Troubleshooting

Appendix A – Checklists/Forms

Appendix B – Special Greeting User ID Mailboxes

Introduction

This Installation and Maintenance (I&M) Manual provides detailed step-by-step instructions for installing, programming, and maintaining Stratagy Flash and IVP8 voice processing systems. It is intended for qualified Service Technicians (Installers) and System Administrators.

Unless noted otherwise in this book, references to Stratagy apply to Stratagy Flash and IVP8.

Organization

This manual is divided into the following chapters:

- **Chapter 1 – Overview** gives a brief description of the Flash and IVP8 products.
- **Chapter 2 – Installation** covers the unpacking, installing and setting up of Stratagy systems.
- **Chapter 3 – Access and Use Stratagy** gives information on how to access the Stratagy systems, on-line help functions, system shutdown, main menu options and a description of the main menu fields.
- **Chapter 4 – Configure Stratagy** provides detailed information about defining the Stratagy system configuration and integration.
- **Chapter 5 – How Stratagy Operates** gives you an overview of the basic concepts of the system — user ID mailboxes, call processing, etc. It also covers the basic system features and how to program each one.
- **Chapter 6 – Menus** gives User, Auto (Scheduling), and Notify Menu screens and field descriptions. It also provides instructions on creating, modifying, copying and deleting mailboxes.
- **Chapter 7 – Token Programming** provides detailed instructions for customizing and administering the Stratagy system. A complete list of tokens and descriptions are included.
- **Chapter 8 – Customization Examples** shows how to customize User IDs to record messages from callers, provide information to callers, or direct the flow of a call.
- **Chapter 9 – AMIS Networking** provides a complete list of Audio Messaging Interchange Specification (AMIS) parameters and information on configuring Stratagy for AMIS.
- **Chapter 10 – System Reports** covers running, viewing, saving and printing reports.
- **Chapter 11 – Maintenance, Upgrades and Troubleshooting** contains instructions on using the backup and restore utilities, procedures for upgrading Stratagy software, retrieving trace files, file copying and basic troubleshooting procedures.
- **Appendix A – Checklists/Forms** provides surveys, checklists, and forms to assist in the installation of Stratagy systems.
- **Appendix B – Special Greeting User ID Mailboxes** gives instructions on setting up the Initial Greeting, Directory and Operator Mailbox greetings.
- **Index**

Conventions

This manual uses these conventions:

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	*Calls attention to important instructions or information.*
CAUTION!	**Advises you that hardware, software applications, or data could be damaged if the instructions are not followed closely.**
WARNING!	**Alerts you when the given task could cause personal injury or death.**
Arial Bold	Represents telephone buttons.
`Courier`	Shows a computer keyboard entry or screen display.
Helvetica Bold	represents tokens. For example: **`M( )`**.
Italics	represent parameter and menu/screen field names, and book titles. For example: *hot_box* parameter, *Extension* field.
"Type"	Indicates entry of a string of text.
"Press"	Indicates entry of a single key. For example: Type **`prog`** then press **`Enter`**.
Plus (+)	Shows a multiple PC keyboard or phone button entry. Entries without spaces between them show a simultaneous entry. Example: **`Esc`**+**`Enter`**. Entries with spaces between them show a sequential entry. Example: **`#`** + **`5`**.
Tilde (~)	Means "through." Example: 350~640 Hz frequency range.
➤	Denotes the step in a one-step procedure.
➤	Denotes a procedure.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

Related Documents/Media

Note Some documents listed here may appear in different versions on the CD-ROM, FYI, or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page.

You can find additional detailed information about Stratagy in the following companion documents:

All Stratagy Products

- Stratagy General Description
- Stratagy Library CD-ROM

Stratagy Flash, IVP8

- Stratagy User Guide
- Stratagy Quick Reference Guide
- Stratagy System Administrator Guide

For authorized users, Internet site FYI (http://fyi.tsd.toshiba.com) contains all current Stratagy documentation and enables you to view, print, and download current publications.

Stratagy eBrochure and Advisor CD-ROM

Packaged with every Stratagy shipped is a CD-ROM containing *Stratagy eBrochure,* and an end-user tutorial, *Stratagy Advisor.* Additional copies of this CD-ROM can be purchased from your Dealer Sales Representative.

eBrochure

The *eBrochure* provides a description of each of the Stratagy products along with audio supplemented mini-demonstrations illustrating the capabilities of Stratagy voice processing. Also included on the CD-ROM is an electronic copy of this *Stratagy General Description.*

Advisor

The *Stratagy Advisor* is an end-user tutorial that can be used as a learning tool for the new user or as a refresher course for existing Stratagy users.

The *Stratagy Advisor* program covers general topics—such as play messages, send messages, etc.—that are applicable to all models of Stratagy systems. All presentations interact with the viewer in order to provide a better understanding of how Stratagy works.

Overview 1

This chapter covers the qualifications of Installers and System Administrators and provides an overview of the Stratagy Flash and IVP8.

Installers and System Administrators

Service Technicians install, upgrade, and maintain the Stratagy system. System Administrators' functions vary by company.

Installer

This manual is designed for a *trained* installer with some familiarity of PCs, an understanding of telephone systems and a general knowledge of Stratagy. To install, upgrade, or maintain the system, you *must* know:

- Stratagy features (refer to the *Stratagy General Description*)
- Stratagy operation, customization, and administration
- Stratagy installation procedures
- The telephone system to which you will connect Stratagy. (Refer to the appropriate installation documentation.)
- Personal Computer (PC) terms, such as: I/O, serial port, parallel port, RS-232, Random Access Memory (RAM), and Disk Operating System (DOS).
- How to safely open a PC and install/remove cards.
- How to identify basic components of a PC: e.g., motherboard, I/O controller, video card, I/O ports, modem.
- How to connect the monitor and keyboard, and how to power on the PC.
- Telephony terms, such as: station side, Central Office (CO), single-line, hunt group, coverage path, hookflash, call forward on ring-no-answer, call forward busy, call forward-all calls, Dual Tone Multi-frequency (DTMF), and tone patterns.
- The difference between an RJ11 and RJ14 connector.
- The separation of the telephone switch and Stratagy.
- How to use a test set or line monitor to analyze test calls.

If you are unfamiliar with any of the above, please take the time to learn the necessary information before you attempt to install Stratagy.

System Administrator

Your company will assign all or some System Administrator functions to an employee who knows your telephone system, organizational structure, and the needs of your customers and employees. The Toshiba Dealer's Technical Service Representative will perform the remaining functions. System Administrator functions may include:

- Initial setup (assisting the Installer with defining your company's configuration and customization requirements)
- Customizing mailboxes
- Generating reports
- Performing system shutdown and restart
- Backing up the system

Memory

The Flash and IVP8 use a solid-state flash memory data storage device that uses non-volatile, semiconductor, read/write storage technology. This means that if power is interrupted, the database is not lost. The database information remains secure through power outages without employing on-board batteries.

The flash memory has very high-data integrity with automatic bad-spot management and sparing, and full Error Correction Coding (ECC) for high reliability. The flash memory data storage device contains no moving parts, is fast, noiseless, light and rugged. It operates as an industry standard Integrated Drive Electronics (IDE) hard disk drive.

It uses the same 512-byte sector size employed in all PC hard disk drives and emulates the disk drive file structure. However, unlike disk drives, the operating speed of the flash memory data storage device does not decrease with increasing amounts of data stored on the drive; nor does disk storage fragmentation occur.

Software

The Flash and IVP8 require Stratagy Admin software, installed on a separate IBM-compatible computer, for local or remote administration and maintenance. Some basic administrative functions (e.g., adding User IDs, resetting passwords) can be performed by the System Administrator using a touchtone telephone (see the *System Administrator Guide* on the *Stratagy Library CD-ROM* for details).

See Chapter 6 – Menus for complete details on using the screens.

Stratagy Flash

The Stratagy Flash (shown right) is a stand-alone two- or four-port, solid-state voice messaging platform that combines Stratagy software with flash memory and an integrated Central Processing Unit (CPU), all enclosed in a compact and easily installed unit manufactured by Intel® Corporation.

Both models, the two-port (SG-F-2) and the four-port (SG-F-4), are equipped with a flash memory cartridge that provides approximately four hours of voice storage. Upgrading the Flash to four ports does not require additional hardware. The upgrade is performed remotely by Toshiba.

Each Flash has been pre-programmed at the factory for out-of-box (plug-and-play) operation on the Strata DK14 and DK40i/DK40. This includes the integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions.

The supported systems and recommended software versions are:

- Strata CTX100/CTX670 — all releases
- Strata DK16/DK16e/DK40/DK40i — all releases
- Strata DK280/DK424/424i — all releases
- Strata DK8/DK14 — all releases
- Strata DK24/DK56/DK96 — Release 4

The Flash requires Stratagy Admin software, installed on a separate IBM-compatible Stratagy Admin PC, for local or remote administration and maintenance. Some basic administrative functions (e.g., adding User IDs, resetting passwords) can be performed by the System Administrator using a touchtone telephone (see the *System Administrator Guide* on the *Stratagy Library CD-ROM* for details).

Hardware

The Flash has a power light, status light, and four voice ports and corresponding voice port status lights. On two-port models (SG-F-2), voice ports/status lights III and IIII are not active (see Figure 1-1).

The Flash's two serial ports are allocated as follows: Serial Port 1 is reserved for the Station Message Desk Interface (SMDI) and Port 2 for Stratagy Admin PC connection.

The Flash unit can be located on a desk/table top or wall mounted, if desired. Two wall-mounting screws and anchors are included with the system.

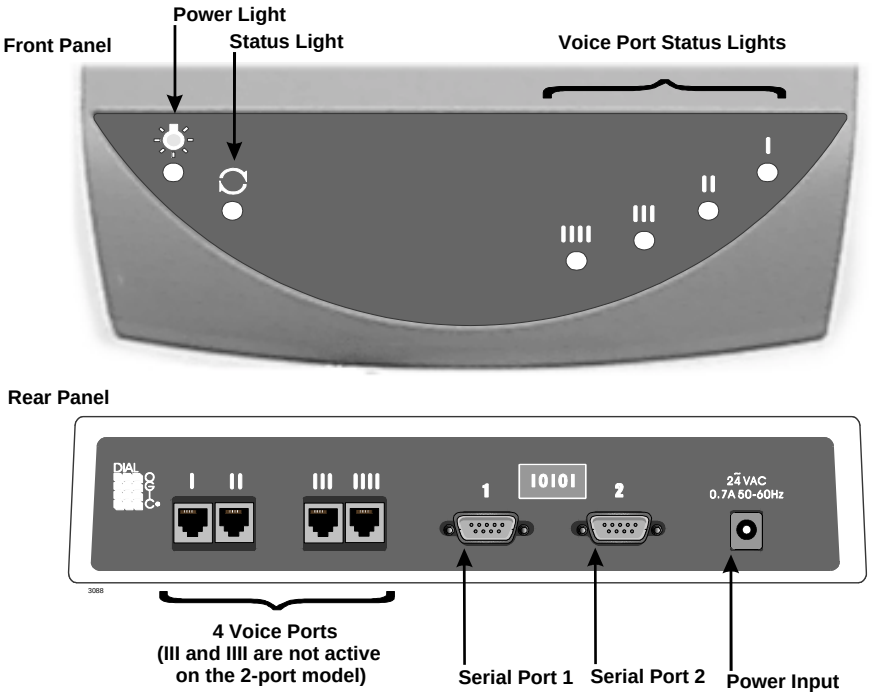


Figure 1-1 Flash Front and Back Panels

On/Off

The Flash is not equipped with an On/Off switch.

➤ **To turn the Flash On/Off**

1. Use Stratagy Admin or Telephone Admin to shut down the Stratagy application.
2. Attach or detach the Flash power supply using a properly grounded electrical outlet. The Power Light goes On/Off accordingly.

➤ **To reset the Flash**

1. Use Stratagy Admin or Telephone Admin to shut down the Stratagy application.
2. Unplug the Flash's power cord from the wall, wait a few seconds and then plug it back in.

Status Light

The status light indicates the state of the Stratagy application:

- On = Stratagy is running.
- Off = Stratagy is shutdown.

Voice Port Status Lights

Each port has a status light labelled I~IIII on the front of the Flash unit (see Figure 1-1) that indicates the hookswitch and ring states of the port. The lights are On/Off based on the following

Signal (Loop Current On)	Voice Port Status Lights	
Hookswitch	**On**	**Off**
On-HOOK		X[1]
Off-HOOK	X	

1. When a ring signal is present, the voice port status light flickers rapidly during the audible part of the ringing.

When Stratagy is shutdown, all connected port status lights are On.

Exclusive Flash Features

Reserved User IDs

The following is a list of reserved User ID mailboxes supported by the Flash. See Chapter 5 – How Stratagy Operates for a complete description of the specific functions.

- User ID 0: Operator
- User ID 411: Directory
- User ID 982: System Shutdown 1
- User ID 983: System Shutdown 2
- User ID 990: Company Greeting
- User ID 991: Caller Instructions
- User ID 994: Hot Box
- User ID 997: Defaults Box
- User ID 998: Direct Message
- User ID 999: System Administrator User ID

Maximum Message Length

The default maximum message length for the Flash is 60 seconds. This is configurable on a mailbox-by-mailbox basis from the Options screen of each User ID Mailbox.

Maximum Greeting Length

The default maximum greeting length for both the current greeting and the custom busy greeting is 30 seconds. This is configurable on a mailbox-by-mailbox basis from the Options screen of each User ID. Longer user greetings reduce the amount of message storage time.

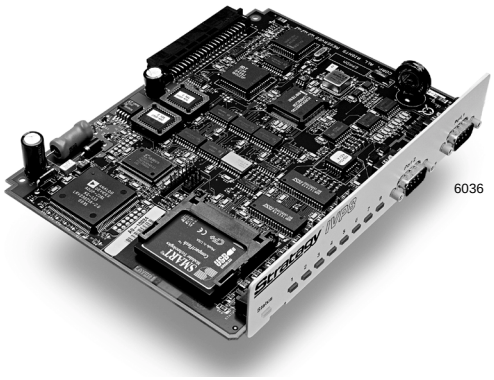
Unsupported Flash Features

In order to preserve storage space, the following features are *not* supported by the Flash system software.

- Future Delivery (User ID Mailbox 995)
- Guest User IDs (User ID Mailbox 996)
- Fax Mail (fax tone detect and transfer is supported)
- Audio Messaging Interchange Specification (AMIS)
- Bilingual prompts
- Speed control for message playback
- Alternate Rate feature
- Some Interactive Voice Response (IVR) related prompts (e.g., monies)

Stratagy IVP8

The Stratagy IVP8 voice processing circuit card (shown at right) supports up to eight ports, and installs in selected card slots of a Strata CTX or DK Base or Expansion Cabinet/Key Service Unit (KSU).



Each IVP8 has been preprogrammed at the factory for out-of-box (plug-and-play) operation on the CTX. This includes the KSU integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions.

The supported systems and recommended software versions are:

- Strata CTX100/CTX670 — all releases
- Strata DK16/DK16e/DK40/DK40i — all releases
- Strata DK280/DK424/DK424i — all releases
- Strata DK24/DK56/DK96 — Release 4

The IVP8 requires Stratagy Admin software, installed on a separate IBM-compatible Stratagy Admin PC, for local or remote administration and maintenance.

Voice mail integration is provided by Strata CTX or DK in-band (DTMF) integration. Strata CTX, DK40i, DK280, DK424, and DK424i can also provide integration using the Simplified Message Desk Interface (SMDI) output of the BSIS, PIOU, PIOUS, RSSU, RSIU, or RSIS SMDI port.

Hardware

The IVP8 consists of a flash drive with approximately four hours of storage, an internal modem, a status light, and eight voice ports with corresponding voice port status lights (see Figure 1-2).

The IVP8's two serial ports are allocated as follows: Serial Port 1 is reserved for SMDI and Port 2 for the Stratagy Admin PC connection.

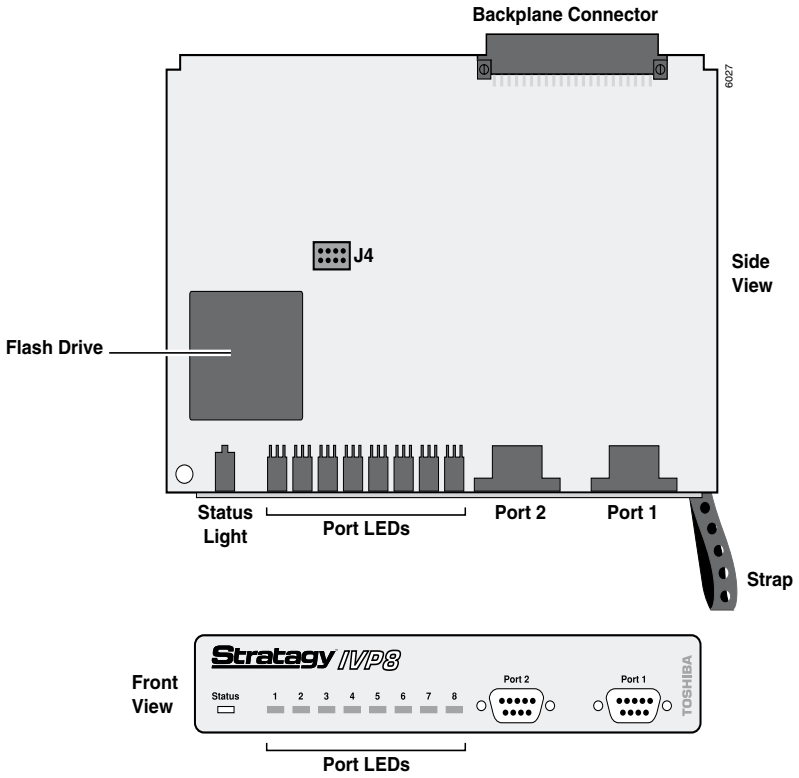


Figure 1-2 IVP8 Hardware Components

Internal Modem

The IVP8 has an internal (soft) modem that operates at up to 2400 baud and can be used for remote maintenance.

Status Light

The status light indicates the state of the IVP8:

Status LED	
At boot-up:	
Off	No power
Blinking Amber	Power-on, self-test
Red	Failed self-test. The port LEDs indicate which test(s) failed: Port LED Green — Test Failed 1 — DRAM 2 — RTC 3 — EEPROM 4 — EPROM Checksum 5 — Flash Drive 6 — Integration Processor 7 — DSP #1
While system is operational:	
Green	System is operational.
Green with Blinking Amber	System is operational and flash drive is active.

Voice Port Status Lights

Each port has a status light labelled 1~8 on the front of the IVP8 unit that indicates the hookswitch and ring states of the port. The lights are On/Off based on the following:

Port LEDs	
Off	Port is on-hook and idle.
Green	Port is off-hook and in use.

AMIS Networking

With the addition of the Call Record feature to the DOS-based products with Release 3.3 software, the number of default Audio Messaging Interchange Specification (AMIS) networking nodes has been reduced to 200. In addition, further restriction to the number of AMIS networking nodes will be required to support IVP8 systems with multi-lingual prompts.

The fewer AMIS nodes the system is configured for, the more operating system memory is available for other features. The Stratagy systems reserve enough operating system memory to run the number of AMIS nodes specified in the *amis_max_nodes* parameter in the Stratagy System Configuration. Additionally, a system using more features and a higher configuration requires more operating system memory. For example, an eight port IVP8 system with a high amount of call traffic using the new Call Record feature requires more operating system memory than a system with fewer ports and/or less traffic. Multi-lingual prompts have been specifically identified as a feature that requires a reduction in the number of AMIS nodes to increase Operating System (OS) memory for proper system operation.

Due to the number of feature configurations possible in a Stratagy system, it is not possible to accurately identify the correct number of AMIS nodes in each case. If the system you are working on runs out of OS memory, the failure causes the system to continually reboot. To correct this, the number of AMIS nodes must be reduced.

Exclusive IVP8 Features

Parameters

Because of the unique nature of the interaction process between the IVP8 and Strata CTX or DK, three parameters are used exclusively with the IVP8 (see "System Parameters" on page 4-14 for the definitions and settings for these parameters).

- *console_slot_id* – identifies the PDKU slot. IVP8 monitors the Direct Station Select (DSS) for Busy Station Identification.
- *dss_active* – tells the IVP8 to retrieve Busy Lamp Field (BLF) busy station information for the assigned *DSS Port* field located on the Users Menu – Options screen (see "Users Menu Options" on page 6-2 for information on programming the field).
- *ksu_time* – synchronizes IVP8's system clock with the system clock of the supporting Strata CTX/Strata DK telephone system. Use of this feature with the Strata CTX requires SMDI integration.

Tokens

As with all Stratagy systems, the IVP8 retains all of the robust application programming that is provided by tokens. There are two tokens supported only by the IVP8. These are:

- **KM** – Enables a Stratagy Admin PC's modem to communicate with the IVP8 internal modem (2400 baud). This token is factory programmed in User ID 993.
- **KT( )** – Directs calls to a designated User ID when:
  - DSS function is active (*dss_active* = true)
  - Assigned in the "answering" mailbox
  - Night Transfer on the DSS console is On.

DSS/Busy Lamp Feature

Once the DSS/Busy Lamp feature has been programmed using the *console_slot_id* and *dss_active* parameters and the *DSS Port* field, IVP8 must be re-started two times. The first re-start configures the DSS parameters/field. The second re-start "loads" the DSS parameters/field into active memory.

Busy Station Identification

The Busy Station Identification feature enables the IVP8 to determine if a station is "busy" without performing a "hookflash" and transfer. IVP8 "reads" the data of a DSS console and knows instantly if the station is busy or in Do Not Disturb (DND).

A station in DND mode signals a "busy" condition to a DSS console. DND and busy are processed the same way by the IVP8 (i.e., the Busy chain is executed).

See "Busy Station Identification for IVP8" on page 5-11 and "DSS/Busy Lamp Feature (For all Strata DK systems)" on page 2-9 for details.

IVP8 System Time

The Main Menu screen displays KSU time when this feature is enabled or the IVP8's own system time (standard, daylight savings) when it is disabled.

See "IVP8 System Time" on page 3-9 for details.

Night Transfer Alternate Routing

Using the **KT( )** token, a feature called Night Transfer Alternate Routing is available. The feature monitors the DSS Night Transfer key in order to activate the **KT( )** token for alternate routing applications.

See "Night Transfer Alternate Routing" on page 2-16 for details.

Installation 2

This chapter provides step-by-step instructions on installing the Stratagy systems.

Pre-installation Instructions

The pre-installation requirements include:

- Conduct a pre-installation survey to determine how to configure and customize the Stratagy system.
- Determine Stratagy hardware sizing.
- Select and prepare the hardware site.
- Determine Stratagy's configuration and integration.
- Customize User ID mailboxes to define the automated attendant and voice messaging system.
- Fill out checklists and forms.

We provide a Stratagy Pre-installation Checklist in Appendix A – Checklists/Forms to assist you in tracking your progress in meeting these requirements and to help you verify that you have completed the necessary steps involved in installation.

Conduct a Pre-installation Company Survey

When conducting a pre-installation survey, you must obtain information about the company, its telephone system, the desired Auto Attendant (AA) and voice mail functions, and the company's Audio Messaging Interchange Specification (AMIS) and fax/modem requirements. As appropriate, use the items suggested below and include any additional questions. See "Pre-installation Company Survey" on page A-2 for a survey form.

Determine Stratagy Hardware Sizing

To determine which Stratagy system will be needed for the installation, it is important that you determine the number of ports and the amount of voice storage that will be required to support the applications.

Number of Ports

The amount of ports that are required for an installation is *dependent on the application*.

- Is Stratagy the primary answering position?
- Will Stratagy be responsible for Telephone Answering/Voice Messaging for users?
- Or, will Stratagy be responsible for all of these applications?

It is essential to understand the application fully before sizing port quantity. Issues to be taken into consideration when calculating the number of ports required for an application are:

Primary Answering Position

Will Stratagy be responsible for answering all or a majority of the incoming calls? If so then:

- How many CO lines are directed by telephone system programming to the Stratagy?

  An acceptable ratio for an initial installation would be two CO Lines to every one Stratagy voice port.

- Is Stratagy going to be programmed with menu options and information mailboxes?

  These applications require increased port time. The 2-to-1 ratio should be sufficient. However, attempts should be made to streamline these applications and design them to efficient conclusions: e.g., recording a message or hanging up.

- How many calls per hour are projected for Stratagy to answer?

  If the calls per hour are extensive, either more ports will be required above the 2 to 1 ratio, or an overflow position could be defined for the voice mail in the telephone system's programming for peak times.

Telephone Answering/Voice Messaging

In a typical installation, the voice processing system is designated to take messages for users when they are either on the telephone or away from their desks; this is termed telephone answering. In addition, the voice processing system can be accessed by users to listen to messages and record new messages for another user or a group of users; this is termed Voice Messaging.

The amount of ports depends on the application and call traffic. When sizing Stratagy voice ports for Telephone Answering and Voice Messaging, consider:

- The quantity of calls that users receive.
- What proportion of time are users unavailable for taking calls?
- Will users be accessing Stratagy often to leave messages for other users?

Some acceptable port quantities to support Telephone Answering and Voice Messaging are:

Users (up to)	Ports
25	2
50	4
200	8
500	16
1000	24

Both Applications

If Stratagy is going to be responsible for both applications—Primary Answering and Telephone Answering/Voice Messaging, use the larger of the two quantities calculated above. For example, if you calculated that four ports would be needed for Primary Answering and two ports for Telephone Answering/Voice Messaging, four ports would be required for the installation of Stratagy.

Determine Stratagy's Configuration and Integration

Determining Stratagy's configuration and integration definitions involves the following (see Chapter 4 – Configure Stratagy).

- Define Stratagy system configuration options: setting system-wide parameters for Stratagy control, including system password, timeout values, and per port options.
- Define the telephone system dial codes, telephone system tone patterns, and system integration patterns.

  Each Stratagy system has been pre-installed at the factory for out-of-box (plug and play) operation on a specific Toshiba telephone system:

Stratagy System	Strata System
IVP8	CTX100, CTX670
Flash	DK14, DK40i, DK40

Note Older Strata DK products are not listed on the Toshiba Plug and Play menu but are configured by using the *set_pbx_type* parameter in the Stratagy System Configuration Menu. The option does not build a system database or message waiting strings for the mailboxes. These must be programmed manually.

All dial codes, tone patterns, and integration patterns specific to the system have been pre-installed at the factory for each Stratagy system.

Important! *Strata DK systems must be configured for the appropriate voice mail system settings individually. See the specific Strata DK Installation and Maintenance manual for these procedures.*

- If you have a Toshiba telephone system, Stratagy automatically defines these parameters once you select the appropriate system during installation (if not pre-installed).
- If you are defining how Stratagy and another manufacturer's telephone systems communicate together, you will also need to reference the telephone manufacturer's installation documentation.

Determine Stratagy's Customized User ID Mailboxes

Determine the User IDs that must be customized to define the Automated Attendant and voice messaging system.

Note With Toshiba Plug and Play, the Strata DK default station (extension number) User ID mailboxes have been pre-installed for the specific Stratagy and Strata DK systems described above.

For your convenience, Appendix A – Checklists/Forms provides the following: Users Form, Auto (Scheduling) Form, Notify Form, and Greeting Scripts Form.

Fill out Checklists and Forms

The following checklists, forms, and surveys are available in Appendix A – Checklists/Forms and simplify the installation process. Make copies as needed.

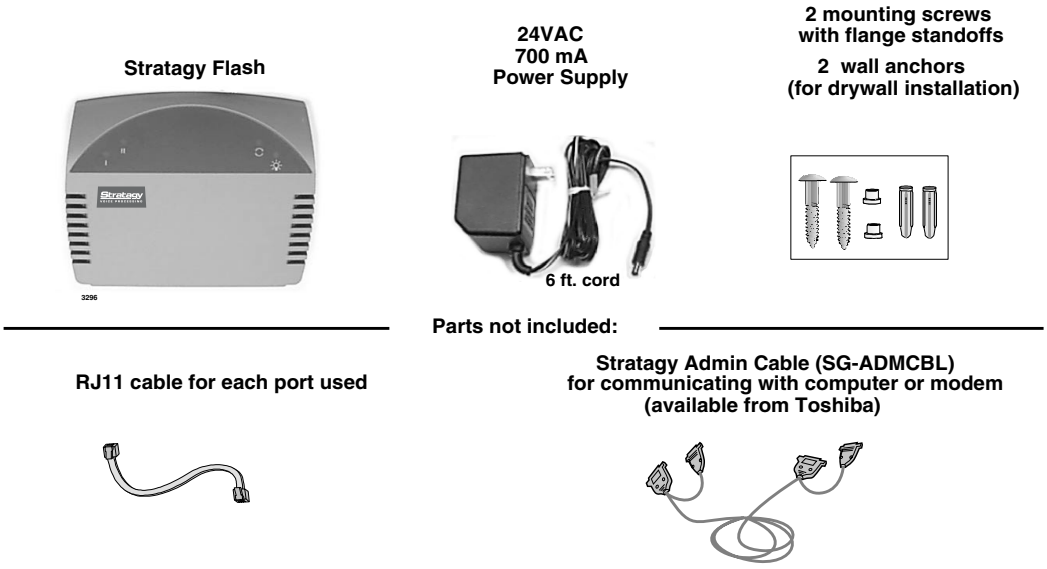
- Pre-installation Company Survey
- Stratagy Pre-installation Checklist
- Stratagy Installation Checklist
- Users Form
- Auto (Scheduling) Form
- Notify Form
- Greeting Scripts Form

Installation

Before starting the installation, read through these instructions thoroughly. Important information is included in this guide that is crucial to a successful installation.

Step 1: Unpack and Inspect Stratagy

1. When you receive the system, examine all packages carefully and note any visible damage. If you find any damage, do not open the packages. Contact the delivery carrier immediately and make the proper claims.
2. Check the items contained in the packages against the packing list. In addition to the hardware components, you should receive an anti-static wrist strap, a caution sticker and a documentation package with the IVP8. For Flash, you should receive the hardware components shown below and a *Stratagy Flash Wall-Mounting Template and Instructions* with the documentation package.



3. Inspect all equipment for damage. If equipment is missing or damaged, contact your supplier immediately.
4. Remove any shipping tape and packing material used to protect the system during shipment. Retain the packing materials for re-use when transporting system hardware.

CAUTION!

You will be handling the IVP8 when it is most fragile — unpacked and exposed. The IVP8, if handled properly, will give long, reliable service. To ensure that the unit is not damaged during installation or maintenance, follow these precautions.

Damage may not always be immediately evident (e.g., no physical damage on the outside of the unit) and system failure may result weeks or months later.

- ***Handle the IVP8 with care.*** **Mechanical shock from dropping, shaking, excessive force when seating the board into the slot, rocking a connector on or other activities can severely damage the disk assembly or the disk's printed circuit board.**
- ***Wear the anti-static wrist strap*** **included in the package. It can also be re-used and left with the Strata CTX or Strata DK cabinet. An electrostatic charge from your body can damage the drive or circuitry permanently.**
- ***Hold the IVP8 by the edges or the strap*** **and never touch the board's surface. Pressure on the printed circuit board or contaminants from your hands (e.g., skin oil, food particles, hand lotion) can cause component failure.**

Step 2: Program Strata

Strata CTX Systems

DTMF Signaling

Stratagy is compatible with all Strata CTXs. Strata CTX needs to recognize Stratagy's DTMF signaling. An ARCS card must be installed in the Strata CTX100 for this DTMF signaling. Strata CTX670 allows four DTMF circuits in its default configuration.

➤ Install and program an ARCS card in the Strata CTX100. When installed, the ARCS card by default allows four circuits. Additional licenses may be required, depending upon the Strata CTX configuration and applications.

SMDI

Are you going to have SMDI? SMDI is required for the Call Record feature with Stratagy Release 3.3. A BSIS card must be located close to the Stratagy.

1. Install and program serial card BSIS in the Strata CTX. Refer to the *Strata CTX Programming Manual*.
2. A serial cable must be installed between the BSIS card and the Stratagy. Toshiba's PPTC-9 (with six-conductor line-cord) is recommended.
3. Stratagy's serial Port 1 is reserved for SMDI communication.

IVP8

To the Strata CTX processor, the IVP8 functions as an analog card (RSTU). Although there are some special program settings required for the IVP8 (e.g., DSS/BLF feature), the Strata CTX should be programmed just as it would for any external voice mail system that is to be connected to it.

Important! *The Strata CTX may need to be reset to initialize some Strata programming assignments. It is important that you make all such assignments **before** installing the IVP8.*

➤ Program slot in Strata CTX **before** installing the IVP8. Refer to *Strata CTX Programming Manual* for details.

DSS/Busy Lamp Feature

Do you want to activate the DSS/Busy Lamp feature? PDKU/BDKU cards must be installed that is programmed for a DSS Console.

➤ Install and program the PDKU/BDKU in the Strata CTX.

Refer to the *Strata CTX Programming Manual* for DSS programming.

Note See "Busy Station Identification for IVP8" on page 5-11 for required settings on IVP8.

Strata DK Systems

The Stratagy Voice Processing system works with all Strata DK40i/DK40/DK16e/DK16, DK424i/DK424/DK280, and DK24/DK56/DK96 (Release 4) systems.

In addition, Flash works with the Strata DK14/DK8.

DTMF Signaling

Strata DK needs to recognize Stratagy's DTMF signaling. Make sure a K5RCU, K5RCU2 or K4RCU3 is installed in the DK40i/DK40/DK16e/DK16, an RRCS on the DK424i/DK424/DK280 RCTU, or CRCU in the DK24/DK56/DK96.

➤ Run Program 03 and assign these code(s) where the DTMF receiver is installed:

DK40i/DK40/DK16e/DK16	DK424i/DK424/DK280	DK24/DK56/DK96
Code 92 for slot 00	Code 92, 93, or 94 for slot 00	Code 92 or 93

Flash

Make sure there are enough single line (analog) station ports on the Strata DK to support the number of Flash ports required.

Note When DK14/DK8 is powered on, Program 03 automatically assigns the correct code for the QRCU.

IVP8

Note The following instructions are based on the IVP8 being installed in a pre-existing Strata DK. If the Strata DK is a new installation, see First-time Programming in Chapter 1 – Overview of the *Strata DK Programming Manual* for more information.

To the Strata DK processor, the IVP8 functions as an analog card (RSTU). Although there are some special program settings required for the IVP8 (e.g., DSS/BLF feature), the Strata DK should be programmed just as it would for any external voice mail system that is to be connected to it.

Important! *The Strata DK may need to be reset to initialize some Strata programming assignments. It is important that you make all such assignments **before** installing the IVP8.*

1. Using Program 03–Flexible PCB Slot Assignments set/verify the following slot assignments:
   - Set code 31 for the slot where IVP8 is installed (see Step 4: "Install Stratagy" on page 2-7).

- Enable the Strata DK to receive DTMF signalling from the IVP8:
  - For DK40i/DK40/DK16e/DK16: Set code 92 for slot 00 for the K5RCU, K5RCU2, or K4RCU3.
  - For DK424i/DK424/DK280: Set codes 92, 93, or 94 for slot 00 for the RRCS installed on the RCTU.
  - For DK24, DK56, DK96: Set codes 92 and 93 for CRCU.
- Set code 64 for the slot where the PDKU resides. IVP8 monitors this slot for the DSS/Busy Lamp feature (see "Busy Station Identification" on page 1-10).

Note For DK40/DK16e/DK16: slot 11 in the Base Cabinet must be set for code 64.

- If SMDI is desired with the Strata DK424i/DK424/DK280: Set PIOU/PIOUS/RSSU for code 43 or RSIU/RSIS for code 49 to enable the SMDI port (see Program 76 if installing RSIU or RSIS SMDI port).

2. Program the Strata DK system for voice mail integration. See the *Strata DK Programming Manual* for details.

Step 3: Shut Down Strata CTX/Strata DK

➤ Turn off the main power switch to the Strata CTX/Strata DK system.

Step 4: Install Stratagy

Flash

➤ Since the Flash and the telephone system must be physically connected, place the Stratagy by the telephone system.

Power Requirements

We recommend the following for the Flash unit:

- A 15A circuit breaker and dedicated AC circuit that does not have an On/Off wall switch (avoids accidental power interruption).
- A UPS in areas where the power source is not stable (frequent power failures, brownouts, etc.).

Environmental Considerations

The area in which you locate the Flash affects its operation. Place it in an appropriate area that is:

- Dry, clean, well ventilated, lighted (avoid placing it in direct sunlight), and easily accessible
- Not subject to extreme hot or cold, corrosive fumes, dust, other airborne contaminants, or excessive vibration

Set up Flash System Hardware

1. If you are wall-mounting the Flash, see the *Stratagy Flash Wall-Mounting Template and Instructions* included in the package for instructions on wall mounting the unit

   ...if the Flash is not going to be wall mounted, place the unit in the site determined.

2. Connect the RJ11C line cords from the Strata single line (analog) station ports to the corresponding Flash port.
3. If using a UPS, plug it into a dedicated outlet.

Note A UPS is required in areas where the power source is not stable (frequent power failures, brownouts, etc.).

4. Connect the six-ft. power supply cable included in the package. Once you have connected the power supply cable, the Flash performs a self test while booting-up.

The Flash voice ports are off-hook for a short period during startup while Stratagy software loads. During that time, the status light is Off and should turn On when finished.

IVP8

CAUTION! See cautions under Step 1 on page 2-4 before proceeding.

1. Locate the proper slot for the IVP8.

Note IVP8 can be installed in any Strata CTX slot. For Strata DK slot assignments, see Table 2-1 and Figure 2-1.

2. Insert the card into the appropriate slot, and apply firm, even pressure to ensure proper mating of connectors (CTX100 shown at right).

CAUTION! Do not hit the board for proper seating. This can damage the IVP8 components.

Table 2-1 IVP8 Strata DK Slot Assignments

DK40i/DK40/DK16e/DK16
Install the IVP8 in any slot in the Expansion KSU where an eight-port card can be inserted. For DK40i/DK40/DK16e, see Chapter 2 – DK40i Configuration in the *Strata DK I&M Manual* for all possible configurations. **Important!** *Do not install IVP8 in slot 18 of the DK40i/DK40/DK16e.* **DK40i/DK40/DK16e/DK16**: A K5RCU, K5RCU2, or K4RCU3 must be installed in the Base KSU to enable end-to-end signaling. **Note** Putting a IVP8 into a Strata DK40i/DK40/DK16e/DK16, eliminates eight telephone lines.
DK424i/DK424
Note For the DSS/BLF feature, the IVP8 must reside in a higher-numbered slot than the PDKU card that the IVP8 monitors (see Figure 2-1 on page 2-10). Install the card in a universal slot starting with slot 12 (if a PDKU or PEKU is in slot 11) or slot 13 (if a RSIU is in slot 11). **Important!** *Do not install the IVP8 in slots 27, 28, 31, 37, 38, 47, 48, 51, 57, 58, 67, 68, 71, 77, or 78.* To enable end-to-end signaling, ensure that an RRCS -4, -8 or -12 is installed on the RCTU, and verify that the RCTU code in Program 03 is for RRCS operation.
DK280
Important! *The IVP8 does not function when installed in slots 31 or 51.* **Note** For the DSS/BLF feature, the IVP8 must reside in a higher-numbered slot than the PDKU card that the IVP8 monitors (see Figure 2-1 on page 2-10). DK280 (R2) — install the card in any universal slot (except slots 31 and 51), starting with slot 12 of the Base Cabinet. DK280 (R3 or higher) — install the card in any universal slot (except slots 31 and 51), starting with slot 12 (if a PDKU or PEKU is in slot 11) or slot 13 (if a RSIU is in slot 11). DK280 (All releases) — To enable end-to-end signaling, an RRCS -4, -8 or -12 must be installed on the RCTU. Verify that the RCTU code in Program 03 is for RRCS operation.
DK24, DK56, DK96
Install the card in any slot after slot 01. A CRCU must be installed to enable end-to-end signaling.
DSS/Busy Lamp Feature (For all Strata DK systems)
For the DSS/Busy Lamp feature to operate, the IVP8 must monitor the DSS/BLF data from a specific PDKU card. The Strata DK telephone system restricts this capability to certain configurations. The IVP8: • Cannot be installed in the first slot of any cabinet (i.e., 11~71). • Can only monitor a PDKU that resides in an odd-numbered cabinet. • Must always be in a higher-numbered slot than the PDKU card, even if the PDKU is in another cabinet. When IVP8 is installed in an odd-numbered cabinet, the system software searches for the PDKU in all lower-numbered card slots in that cabinet (as defined by the *console_slot_id* parameter on page 4-17). When the IVP8 is installed in an even-numbered cabinet, the system software searches for the PDKU in all lower-numbered card slots of the preceding odd-numbered cabinet. see Figure 2-1 on page 2-10 for examples.

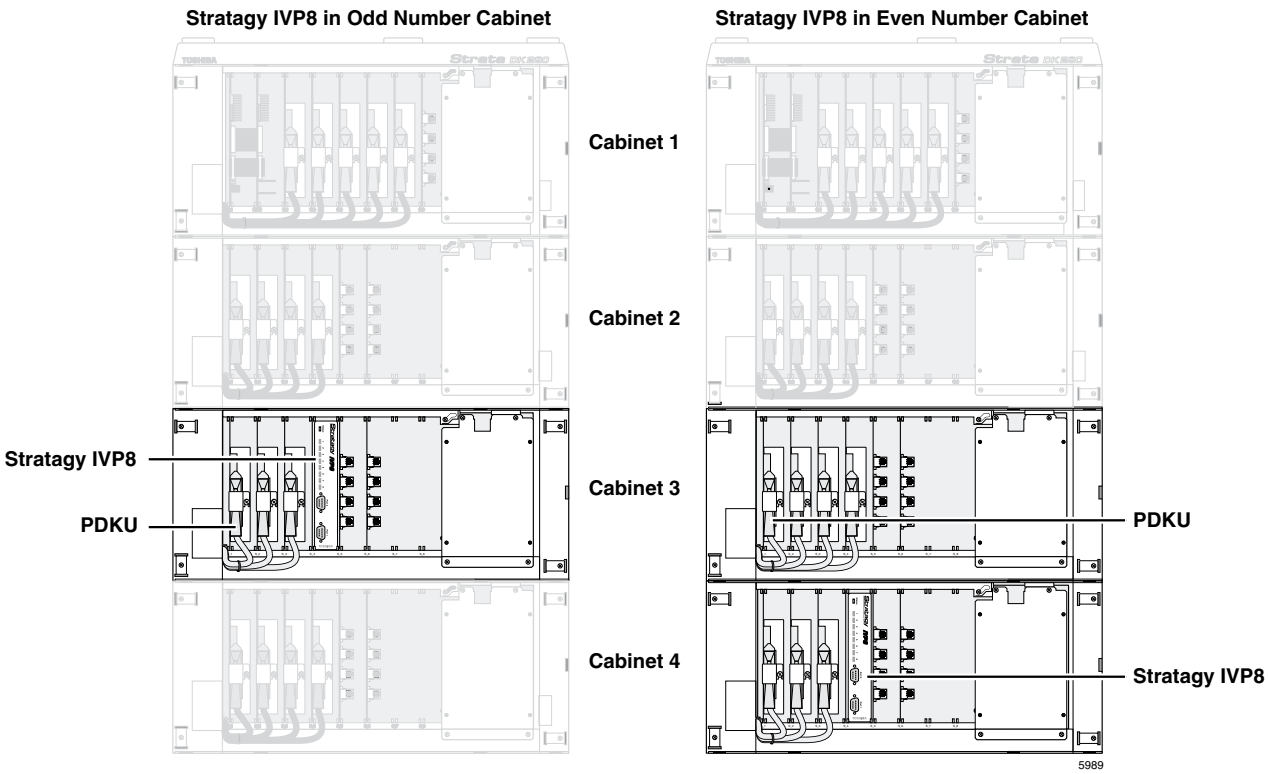


Figure 2-1 Strata DK424i/DK424/DK280 PDKU DSS/Busy Lamp Field Slot Assignment Examples (console_slot_id configured as 0)

Step 5: Restart Strata CTX/Strata DK and Verify Stratagy is Functioning Properly

Note Each Stratagy has been preprogrammed at the factory for out-of-box (plug-and-play) operation on the Strata CTX and Strata DK424i. This includes the integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions.

➤ Turn on the main power switch to the Strata CTX or Strata DK system.

Note IVP8: During this process the status light is blinking amber and should turn solid green when finished (see Figure 1-2 and "Status Light" on page 1-8). The process should take approximately four to five minutes.

Step 6: Verify that Voice Playback, Basic Auto Attendant and Ports are Functioning Correctly

➤ Dial the extension number for each port. Stratagy should (for each port):

- Answer and play the Toshiba Plug and Play company greeting ("Thank you for calling…"), greeting 1 in User ID mailbox 990.
- Continue to play the Toshiba Plug and Play caller instructions greeting ("If you know the extension of the person you wish to reach…"), greeting 1 in User ID mailbox 991.

Step 7: Install Stratagy Admin Software (VSA.3x)

Note Loading the Stratagy Admin software can be done before/after connecting the Stratagy Admin PC to the Stratagy.

The Stratagy Admin PC, connected to the Stratagy (see Step 8 "Connect Stratagy Admin PC to Stratagy" below), must meet the following specifications:

- IBM-compatible
- 3.5" 1.44 (high-density) floppy-disk drive
- Hard drive with a minimum of 5MB of available disk space
- 580KB RAM free memory

CAUTION! Do not install the Stratagy Admin VSA.3x software into an existing Admin2 or Admin3 directory used for Release 2 systems. If you do, file corruption can occur when communicating with a Stratagy.

➤ **To install Stratagy Admin Software**

1. Insert the Stratagy Admin disk into the floppy disk drive of the Stratagy Admin PC.
2. Access the DOS prompt (`C:\`).
3. To begin the installation procedure, type
   `a:install c:\VSA3x`
   where: x = the version letter of the Admin software you are installing.

Note It is recommended that you not overwrite the current Stratagy Admin directory but create a new directory.

4. Press any key to continue. The Stratagy Admin program is installed on drive C: in subdirectory `VSA3x`.

Step 8: Connect Stratagy Admin PC to Stratagy

Communication between the Stratagy Admin PC and the Stratagy is accomplished by one of two methods: local or remote.

Stratagy uses the serial Port 2 by default to communicate with the Stratagy Admin PC (see Figure 1-2). This setting can be changed using the *admin_port* parameter in the Stratagy System Configuration file (see "System Parameters" on page 4-14 for detailed information).

Local Connection

➤ Using a null-modem cable, connect the Stratagy Admin PC to the Stratagy. A prefabricated cable (SG-ADMCBL), designed expressly for Stratagy Admin communication with the Stratagy is available from Toshiba. See Figure 2-2 below for the Flash configuration.

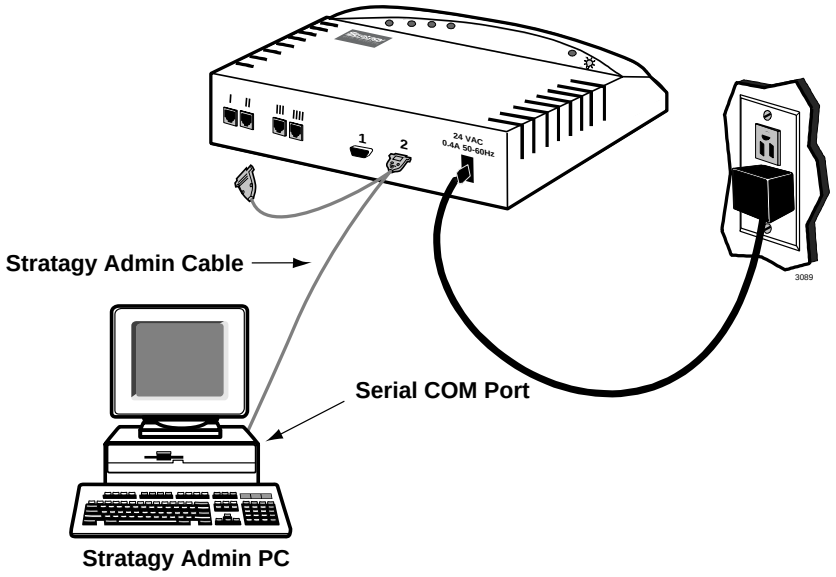


Figure 2-2 Stratagy Flash/Stratagy Admin PC Local Connection

Note If you wish to purchase individual cabling/connectors/adapters in lieu of purchasing the Toshiba Stratagy Admin cable, we have provided the wiring diagrams (see Figures 2-3 and 2-4).

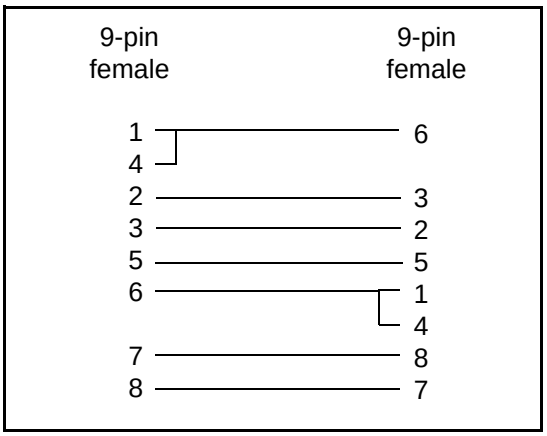


Figure 2-3 RS-232 DB9 to DB9 Cabling

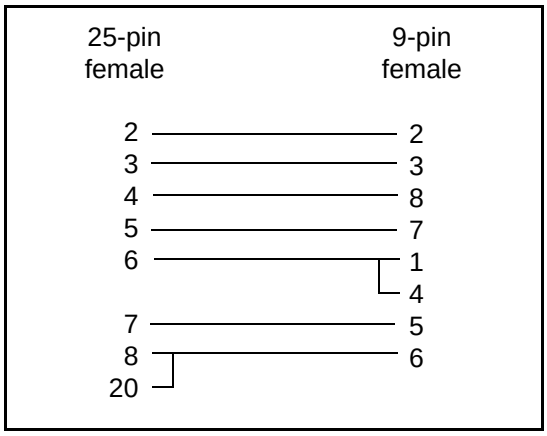


Figure 2-4 RS-232 DB25 to DB9 Cabling

Remote Connection

Remote communication with the Stratagy requires the installation of a modem on the Stratagy Admin PC (if a modem does not already exist).

The IVP8 comes equipped with an internal modem of 2400 baud and does not require any additional equipment. A 9600 baud external modem can also be used for remote connection with the IVP8.

Remote communication with the Flash (see Figure 2-5) requires the installation of an external modem on the Flash.

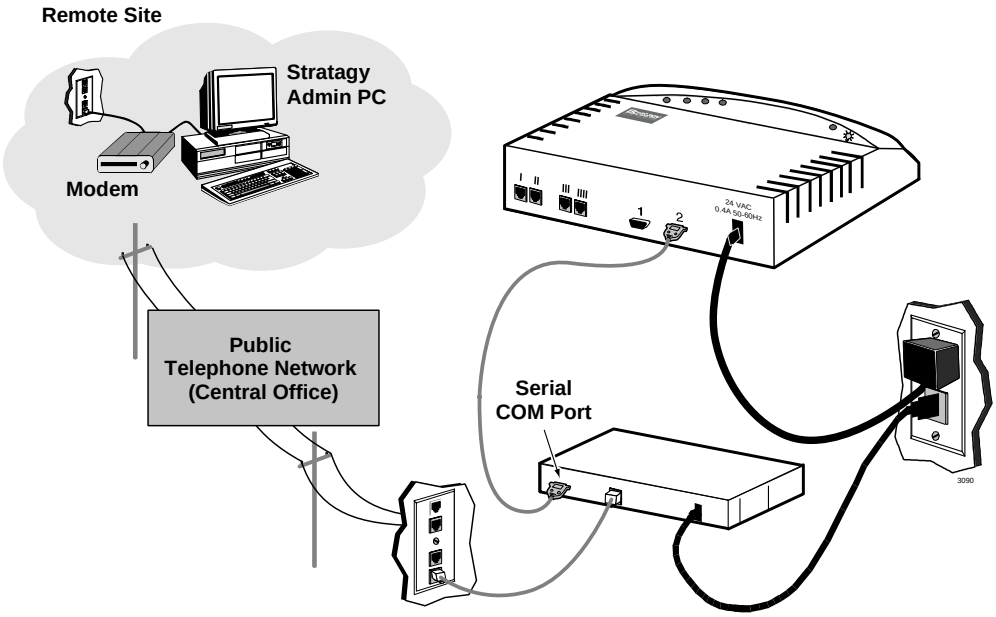


Figure 2-5 Flash/Stratagy Admin PC Remote Connection

Stratagy Admin PC Modem

➤ Prepare the Stratagy Admin PC by installing, connecting and configuring a modem. The modem must be capable of communicating at a minimum of 9600 baud.

CAUTION! Internal modems configured for IVP8 COM ports 3 or 4 are not supported by Stratagy Admin software.

Stratagy Modem

The Flash can communicate through a customer-supplied external modem. An external modem can be installed on the Flash for a communication speed of 9600 baud.

The IVP8 can communicate through either an internal or external modem.

IVP8 Internal Modem

The IVP8 has an internal modem that communicates at up to 2400 baud. No additional equipment is necessary. (See **KM** token in Step 13: “Program the Applications” on page 2-14 for programming information.)

Flash and IVP8 External Modem

An external modem can be installed on the Stratagy for a communication speed of 9600 baud. If use of an external modem is desired, use the following installation procedure.

➤ **To install an external modem**

1. Equip the Stratagy with a Hayes-compatible 14.4KB V32.bis modem. Toshiba's fax/modem (SG-FMOD) has been tested for consistent operation and is recommended. Use of other modem models cannot be guaranteed for trouble-free operation.

Note The default setting configured for the Stratagy remote access is serial port 2 (see Figure 1-2). Both local and remote access use the same designated serial port on the Stratagy.

2. Connect a telephone line to the modem. Use either a station connected to the telephone system or a dedicated Central Office (CO) line.

Step 9: Configure Stratagy Admin Software

➤ Configure Stratagy Admin software using the Admin PC Configuration screen. See Chapter 4 – Configure Stratagy for instructions on using the screen.

Step 10: Access Stratagy

➤ Access Stratagy using the remote method (Chapter 3 – Access and Use Stratagy).

Step 11: Configure Stratagy

➤ Configure Stratagy using the Stratagy Configuration Utility. See Chapter 4 – Configure Stratagy for instructions on using the utility.

Step 12: Program the Mailboxes

➤ Program the User mailboxes for the customer's application. See Chapter 6 – Menus for complete details on using the screens.

Step 13: Program the Applications

Note See Chapter 7 – Token Programming for complete details on all the Stratagy tokens.

%K Token

Stratagy recognizes the Calling Party Identification when sent from the Strata CTX/Strata DK telephone system through a SMDI integration.

Once a value is determined to be a Calling Party ID number, it is stored in a buffer (**%K** token) for the duration of the call. A User ID programmed with a token application that reads the **%K** value performs the programmed function (e.g., a database look up for call routing based on the number calling). When the call is completed, the value stored in the buffer (**%K**) is cleared.

SMDI Calling Party Identification

The Strata CTX/Strata DK telephone system only provides the Stratagy with incoming Calling Party ID via SMDI integration. Data messages or packets are sent into the system to provide information concerning the type of call and the calling party ID.

Note When configuring the Stratagy for SMDI, make sure both the Stratagy and the telephone system are configured concurrently. If the phone system is configured for a 10-digit Calling Party ID, the Stratagy must also have the proper 10-digit integration patterns in the System Integration Patterns screen (see "System Integration Patterns" on page 4-9). Also make sure the correct notification template has been selected in the User ID Notify screen.

See "SMDI Serial Integration" on page 4-32 for detailed information on SMDI, caller ID, and **%K** token use.

New User Tutorial Introductory Recording

The New User Tutorial feature plays a introduction prompt prior to beginning the tutorial. Stratagy comes with a default recording that is saved in the system as a voice file called 'TUTORIAL.VOX'. This file can be found in the STRATAGY directory on the hard drive.

This prompt can be rerecorded to personalize the introductory recording. For example the recording could say, "The following is a new user tutorial that will walk you through the set up of your mailbox... Please see Jane Doe your Installation Coordinator for XYZ Telecom if you have any questions."

The default recording can be rerecorded by the use of Token Programming.

Rerecord Tutorial

1. Create a new User ID in the system.
2. In the Extension field enter:

   @KR(C:\\STRATAGY\\TUTORIAL.VOX)G(991)

@	stop normal processing
KR	record a voice file
( )	file name and location within parentheses
G(991)	Go to User ID 991

3. Call into the Stratagy system and dial the newly created mailbox. A beep will be heard to indicate the start of recording.
4. Record the new TUTORIAL.VOX, finish recording by pressing **#**.
5. To rerecord, redial the mailbox number.
6. To playback the new recording, create an additional User ID with the following Token string in its Extension field:

   @P(X,C:\\STRATAGY\\TUTORIAL.VOX)G(991)

@	stop normal processing
X	valid DOS file name
( )	file name and location within parentheses
G(991)	Go to User ID 991

7. As with all Token Programming, make sure that the Do Not Disturb feature is Off or the token program will not run.

Exclusive IVP8 Tokens

Tokens available exclusively for the IVP8 are:

- **KM** – Enables a Stratagy Admin PC's modem to communicate with the IVP8 internal modem (2400 baud). This token is factory programmed in User ID 993.

  Example: **@KM**

- **KT( )** – Directs calls to a designated User ID when DSS function is active (*dss_active* = true), the DSS port is assigned in the "answering" mailbox, and the Night Transfer on the DSS console is On.

  Syntax: **KT(XXX)G(YYY)**

  where:

  XXX Box number used when Night Transfer is On.

  YYY Box number used when Night Transfer is Off.

Night Transfer Alternate Routing

The **KT( )** token is used by the Night Transfer Alternate Routing feature. The feature monitors the DSS/BLF console's Night Transfer key in order to activate the **KT( )** token for alternate routing applications.

IVP8 cannot be programmed to monitor the Night Transfer key when programmed on a telephone only DSS Console. However, a Night Key can be programmed on both a telephone and DSS Console.

Program Example

The following is an example on how to program this feature. In this example, we use:

- User ID: 900
- User ID when Night Transfer is On: 901
- User ID when Night Transfer is Off: 990

➤ **To program the IVP8 for Night Transfer Alternate Routing**

1. Define the Users record to contain:

User ID 900	
Extension	**@KT(901)G(990)**
Do Not Disturb	**OFF**
Store Messages	**NO**
DSS Port	port number
Note	*Set this field to the first port of the PDKU card designated for DSS/BLF console and defined by the console_slot_id parameter. If PDKU is in card slot 11, then DSS Port assignment is 0. Strata CTX/Strata DK assigns the first port of the slot 64 card as a DSS "host" port.*

2. In the Stratagy System Configuration file:
   - Set the *box_grt* parameter for the specific port and type in **900**.

Important! *Remember to program a User ID (e.g., User ID 991) as the Done Chain of the mailbox designated in the box_grt parameter (in this example 900) to prevent the IVP8 from entering a loop that can cause IVP8 software to lock up. Refer to Technical Bulletin TB40-0002 "Programming Caution" available on the Internet FYI site.*

   - Activate the *dss_active* parameter by setting it to **true**.

3. Access the User ID 901 mailbox via telephone and record greeting 1.

When the Night Transfer key is enabled, calls for the specific port are routed to User ID 901. When the Night Transfer key is disabled, calls route to User ID 990.

Step 14: Record Special Greetings

➤ Record the initial greetings (company greeting, caller instructions), directory mailbox instructions and operator mailbox greeting. See Appendix B – Special Greeting User ID Mailboxes for instructions.

Step 15: Shut Down Stratagy System

The *restore_config* parameter defaults to true in the Stratagy System Configuration file (see Chapter 4 – Configure Stratagy) and enables the Automatic System Recovery process. The Stratagy uses the Automatic System Recovery process (see page 11-14) to restore the last known good configuration if it encounters a problem on restart.

With *restore_config* set to true, you must now shut down and restart with the current software version (see "System Shutdown" on page 3-6) to save the revised configuration files, etc. This ensures that if an error is encountered during boot up the Stratagy reboots using the most current database.

Step 16: (Optional) Back up Database, Mailbox Names and Greetings

When you finish the installation process, we recommend you back up your new database, mailbox names and greetings. See "Backup Utility" on page 11-3 for instructions.

Access and Use Stratagy 3

This chapter discusses how to start up, use and shut down the Stratagy system for maintenance and other functions. More specifically, this chapter discusses:

- Access Stratagy – Compares the two methods for accessing Stratagy: locally, or remotely.
- Local Access – Access Stratagy via a cable connecting the Stratagy system with a portable or desktop PC.
- Remote Access – Access Stratagy via a modem from a portable or desktop PC.
- System Startup – How the Stratagy system starts up.
- Use Stratagy – Navigating through the menus and using online help.
- Online Help Function – Describes help line and detailed help.
- System Shutdown – Exiting the Stratagy program and accessing the Stratagy Configuration Utility.
- Main Menu Options – Using the Main Menu for customization and administration.
- Main Menu Field Descriptions – shows the main menu and gives a definition of each field.

Access Stratagy

There are two ways to access the Stratagy system: local and remote:

Method	Description	Requirements
Local	Access Stratagy via a cable connecting the Stratagy system with a portable or desktop PC.	• Customer-supplied portable/desktop PC • Stratagy Admin software • Customer-supplied Stratagy Admin Cable (SG-ADMCBL)
Remote	Access Stratagy via a modem from a PC located at this or another site.	• Stratagy Admin software • Customer-supplied modem for Flash **Note** IVP8 has an internal modem.

Local Access

Local access refers to accessing the Stratagy system via a cable connecting the Stratagy system with a portable or desktop PC. To perform local access, you must connect the local system to the Stratagy system each time you access Stratagy locally (see Chapter 2 – Installation for details).

Before You Start

It is recommended that you:

- Back up your database prior to starting this procedure. (See Chapter 11 – Maintenance, Upgrades and Troubleshooting for instructions.)
- Make a backup copy of the installation disks and store them in a safe place.
- Verify that Stratagy is operational by making a test call into the system.

Note Menu screens detailed in this section are available only in Stratagy Admin version VSA.2G or later; however, only VSA.3x can be used with the Flash.

Access Stratagy Locally

1. From the DOS prompt (**`C:\VSA3`** for Flash and **`C:\VSA3`** for IVP8), type: **`admin`** and press **`Enter`**. The Stratagy Admin screen displays.

   Important! *The Stratagy Admin PC must be configured for the correct serial port in Stratagy Admin prior to performing Step 2.*

2. Press **`Enter`**.The Stratagy Admin software prompts for the Stratagy's system password.
3. Type the password (the default is **`Stratagy`**) and press **`Enter`**.

   If a modem is not detected, Stratagy Admin establishes a direct connection (local access).

Remote Access

Remote access refers to accessing the Stratagy system via modem from a portable or desktop PC located at this or another site.To perform remote access, you must prepare the Stratagy system by installing and connecting the modem and preparing the portable/desktop PC by configuring the modem (see Chapter 2 – Installation for details).

Stratagy Admin software version VSA.3x has two modes of accessing the Stratagy remotely:

- Direct Dialing Mode — the Stratagy modem has a dedicated telephone line, enabling you to dial into the number directly.
- Manual Dialing Mode — the Stratagy modem does not have a dedicated telephone line and an operator must transfer the call to the modem number.

Note Manual dialing requires a standard telephone be connected to the Stratagy Admin PC modem.

Before You Start

It is recommended that you:

- Backup your database prior to starting this procedure. (See Chapter 11 – Maintenance, Upgrades and Troubleshooting for instructions.)
- Make a copy of the Installation Disks as a backup copy and store them in a safe place.
- Verify that Stratagy is operational by making a test call into the system.

Access Stratagy Remotely

1. From the DOS prompt (**`C:\VSA3`** for Flash and **`C:\VSA3`** for IVP8), type: **`admin`** and press **`Enter`**. The Stratagy Admin screen displays.

Important! *The Stratagy Admin PC must be configured for the correct serial port in Stratagy Admin prior to performing Step 2.*

2. Press **`Enter`**.The Stratagy Admin software prompts for the Stratagy's system password.
3. Type the password (the default is **`Stratagy`**) and press **`Enter`**.

If a modem is detected, Stratagy displays the screen shown at right:

Direct Dialing Mode

➤ Type the telephone number (50 digits maximum). Do not use dashes (e.g., 9,7678989). Press **`Enter`**.

Once the connection is made to the Stratagy modem, a carrier tone is heard. The Stratagy Admin synchs up to the modem. A message reading **`Connection established`** appears briefly on the screen and the Main Menu displays.

Manual Dialing Mode

1. Press **Enter** to go to the Manual Dialing Mode screen.
2. Go off-hook on the standard telephone and dial the telephone number. Once connection is made to the Stratagy external modem, a carrier tone is heard.
3. Press **Enter**. Stratagy Admin synchs up to the modem. A message reading **Connection established** appears briefly on the screen and the Main Menu displays.

Use Stratagy Remotely

Both the remote and the Stratagy system are active simultaneously. Use the remote as you would from the Stratagy monitor and keyboard.

System Startup

When Stratagy Admin on a remote PC is accessed, the software automatically displays the Main Menu. From the Main Menu, you can customize User ID mailboxes, maintain the system, and perform administrative functions. Or, you can shut down Stratagy and use the Stratagy Configuration Utility to backup or configure Stratagy with your telephone system.

Use Stratagy

The Stratagy system provides a series of menus to assist you in customizing User ID mailboxes and performing administrative functions. In addition, Stratagy's online help provides clarification as needed.

Navigate the System

Using the Stratagy menus, you can navigate the system to customize User ID mailboxes and perform administrative functions. The Main Menu is the core of the program. The administrative functions (report generation, system shutdown, and filecopy) are available from the Main Menu. The Users Menu, from which all User ID mailbox customization takes place, is also a Main Menu option. For an illustration of how the menus are arranged, see Figure 3-1.

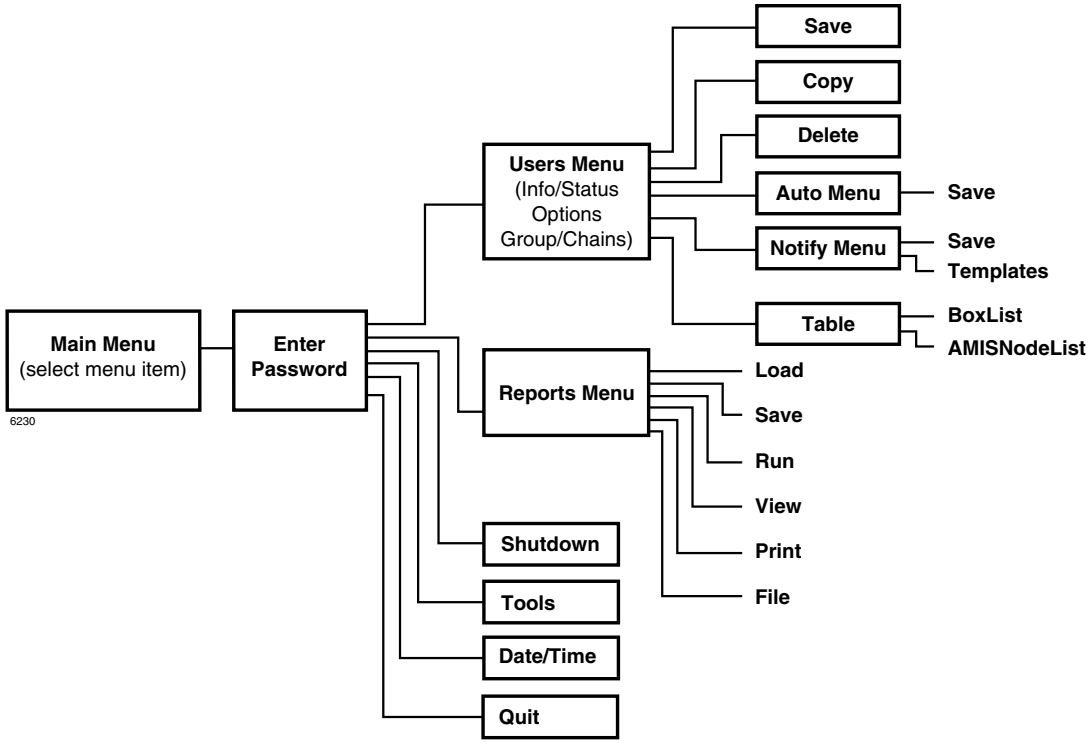


Figure 3-1 Navigating the Stratagy System

All screens/menus use the standard keys shown in Table 3-1.

Table 3-1 Standard Keys

Key	Movement
arrow (↑↓)	moves cursor to next field
F1	provides help text
Esc	regresses one screen
spacebar	toggles Enable/Disable, On/Off, Yes/No fields
Page Up/Down	Users Menu: scrolls User IDs Auto/Notify Menus: scrolls record summary information
Tab	moves cursor through fields
Enter	selects highlighted options
Home	moves cursor to first field
End	moves cursor to last field

Online Help Function

Stratagy's online help function is content-specific and is available on a field-by-field basis. Stratagy provides two types of online help—the help line and detailed help.

Help Line

The help line automatically displays the information about the current field at the bottom of the screen.

Detailed Help

Additional help is available for most of the fields. To display the detailed help for a field, highlight the field and press **F1**. Use the arrow keys (↑↓) to scroll through the information. To exit detailed help, press **Esc**.

System Shutdown

Occasionally you need to shut down, or exit, Stratagy call processing. Circumstances include:

- Turning power off to perform hardware maintenance
- Moving the system to another location

CAUTION! **Never shut down the Flash by pulling the Flash's power cord from the wall or the IVP8 by turning off the Strata CTX/Strata DK's power. Doing so may corrupt the system files that are in use.**

Methods of Shutdown

Stratagy can be shut down in two ways:

- From a telephone dial pad
- From the Shutdown function on the Stratagy Admin's Main Menu

Shutdown Using the Telephone Dial Pad Method

Important! *System shutdown using the telephone dial pad is not operable if the Stratagy Admin is connected.*

➤ **To enable shutdown procedure and change mailbox 983 security code**

Important! *It is extremely important that the security code for mailbox 983 be changed. If the security code is not changed, it is possible for someone who knows Stratagy's default password scheme to call into the system and shut it down.*

1. Using Stratagy Admin, log on to the Stratagy. The Stratagy Admin Main Menu displays.
2. Press **Alt+U**. The Users Menu, Options screen displays.
3. In the *User ID* field, type **983** and press **Enter**. The Options screen displays for box 983.
4. Using the arrow down key, place the cursor in the *Security Code* field.
5. Type the new security code.

Note For added security, the security code does not appear on the screen as you type it.

6. Navigate to the *Do Not Disturb* field.

7. Press the spacebar to change the field from On to Off.

Note Changing the Do Not Disturb option enables the token programming residing in the *Extension* field of the mailbox. It is the token string in this mailbox that performs the shutdown procedure.

8. Press **Alt+S** to save the changes.

➤ **To shut down the Stratagy using the telephone dial pad**

1. From the telephone dial pad, call Stratagy. Once you dial into Stratagy, the system answers with the standard company greeting. Stratagy prompts you to enter the User ID.
2. Enter **983**. Stratagy prompts you to enter the security code.

Important! *You must wait until the entire prompt has been played before entering the security code. If the code is entered prior to the completion of the prompt, the shutdown does not occur.*

3. Enter the new security code (the default is **983997**) and press **#**. All inactive channels are taken off-hook. All active channels are given a 60 second time delay to complete processing the current activity. After 60 seconds, they are disconnected and the system shuts down.

Note The Stratagy is completely shut down when the status light is Out and all port LEDs are On.

Important! *For security reasons, you should change the default security code.*

Shutdown Using the Stratagy Admin's Main Menu

1. From Stratagy Admin's Main Menu, select Shutdown by pressing **Alt+s**. Stratagy asks for the password.
2. Enter the password (the default is **Stratagy**) and press **Enter**. The screen enables you to select one of the following options:
   - Shutdown and Restart CURRENT Version — Restarts Stratagy.

Note This option must be used any time you make significant programming changes (see "Automatic System Recovery" on page 11-14 for details).

   - Shutdown and Trace CURRENT Version — Shuts down, then restarts Stratagy in the TRACE mode (TRACE.OUT file is created) on Stratagy's flash drive. See "Trace" on page 11-12 for details.
   - Shutdown and Start NEW Version — Shuts down, then restarts Stratagy using the new database and new Stratagy system software, if any.
   - Shutdown and Start OLD Version — Shuts down, then restarts Stratagy using the software version previous to the upgraded software.
   - Shutdown, SCANDISK, and Restart — Shuts down, runs ScanDisk program and then restarts Stratagy.

     Note There is no screen interaction during the running of the ScanDisk Utility.

   - Shutdown and STOP for power off — Takes Stratagy off-line and does not restart it.

Notes

- This option is not available when accessing Stratagy remotely.
- The Stratagy is completely shut down when the status light is Out and all port LEDs are On.
- IVP8 – This is the only option on the Shutdown menu that parks the head.

3. From the Shutdown Menu, highlight your selection and press **`Enter`**.
4. If you chose the "Shutdown and STOP for power off" option, Stratagy asks you to confirm the shutdown. Type **`Y`** to confirm. The DOS prompt (**`C:\VSA3`**) displays.

➤ **To restart/reset the IVP8 system after selecting "Shutdown and STOP for power off" option**

Note If you select any of the first five options on the Shutdown Menu, Stratagy automatically restarts.

1. Holding the Stratagy by the edges or the strap, gently pull the card part way out of the slot. The card needs only to be pulled out so that the connectors do not meet.
2. Wait a few seconds and then gently push the card back into place. Apply firm, even pressure to ensure proper mating of the connectors. This automatically restarts the system and puts all channels on-hook and ready to accept calls.

➤ **To restart/reset the Flash system after selecting "Shutdown and STOP for power off"**

Note If you select any of the first five options on the Shutdown Menu, Flash automatically restarts.

➤ Unplug the Flash's power cord from the wall, wait a few seconds and then plug it back in. This automatically restarts the system and puts all channels on-hook and ready to accept calls.

Main Menu Options

From the Main Menu (see Figure 3-2 on page 3-10), you can access the following options:

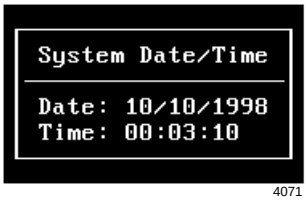
- Users (**`Alt+U`**): accesses the Users Menu (customizing User ID mailboxes). See Chapter 6 – Menus for information on using the Users Menu screens.
- Reports (**`Alt+R`**): generates reports. See "Run Report" on page 10-5 for more information.
- Shutdown (**`Alt+S`**): shuts down the system. See "System Shutdown" on page 3-6 in this chapter.
- Tools (**`Alt+T`**): uses the Filecopy Utility. See "Filecopy" on page 11-9 in this chapter.
- Date/Time: sets system date and time. See "Change System Date and Time" on page 3-9 in this chapter.

➤ **To access the options**

1. Press **`Alt+`** the first character of the option (e.g., **`Alt+U`** for the Users Menu).
2. Type the password. (The default password is **`Stratagy`**, with the first letter uppercase.)

Change System Date and Time

1. From the Main Menu, select Date/Time by pressing **Alt+D**. Stratagy prompts: **Password?**
2. Type the password and press **Enter**. (The default password is **Stratagy**, with the first letter uppercase.) The system date/time screen displays (shown at right). The current date and time settings display, with the date field highlighted. Use the arrow keys (↑↓) to move between the date and time fields.



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3. Press **Enter** to move to the next field

   ...or type the new date and time settings. The date format is: **mm/dd/yyyy**. The time format (24-hour clock) is: **hh:mm:ss**
4. Press **Esc**. The Main Menu displays.

Daylight Saving Time

The system time can be configured to change automatically to daylight saving time. See "daylight_saving_time" on page 4-17 for more information.

IVP8 System Time

Using the *ksu_time* parameter, you can synchronize IVP8's system clock with the system clock of the supporting Strata CTX/Strata DK telephone system. Setting this parameter to true, disables the *daylight_saving_time* parameter.

Note An LCD telephone must always be physically installed on the first port of the PDKU card in the Strata DK (defined in *console_slot_id* parameter). During installation, the IVP8's system time must be reset prior to syching with the Strata CTX/Strata DK. See "ksu_time" on page 4-21 for details.

This feature requires SMDI integration to work with the Strata CTX.

Main Menu Field Descriptions

Figure 3-2 Main Menu with Sample Data

Table 3-2 Main Menu Screen Fields

Menu Bar Access Options (select).	
Users	Press **Alt+U** to access the Users Menu. See the Programming Section.
Reports	Press **Alt+R** to generate reports. See "Run Report" on page 10-5 for more information.
Shutdown	Press **Alt+S** to shut down the Stratagy system. See "System Shutdown" on page 3-6 for more information.
Tools	Press **Alt+T** to use the Tool Utility. See "Filecopy" on page 11-9 for more information.
Date/Time	Press **Alt+D** to set the system date and time. See "Change System Date and Time" on page 3-9 for more information.
Quit	**Important!** *This function quits the Stratagy Admin program and **does not** shut down the IVP8.* Press **Alt+Q**. The remote PC exits Admin and returns to the DOS® prompt.
Daylight time	(Display only) The menu displays Daylight time from the first Sunday in April until the last Sunday in October. The system must be set for daylight savings time, using the *daylight_saving_time* parameter. See Chapter 4 – Configure Stratagy. If not set for Daylight time, Standard time is displayed. For IVP8: KSU time can also display when this feature is enabled or the IVP8's own system time (Daylight, Standard) when it is disabled.
Main	Menu title.

Table 3-2 Main Menu Screen Fields *(continued)*

System Information (Display only, in addition to the fields, the screen displays the Stratagy voice processing model number, software version, voice board driver, and TAIS, Inc. Toshiba telephone system name and model number.)	
Usage	System usage (n/pp%). *n:* *number of times all ports were busy* *pp%:* percent of time the CPU is idle
Users	Number of defined User ID mailboxes.
Space	Available remaining flash drive space in time (hh:mm) and percent of total flash drive space (nn%).
Calls	Number of calls Stratagy answered since system started.
Notify	User ID mailbox the system is currently notifying. Scan displays when the system is scanning mailboxes to determine where notification is needed.
Notify At	Date (mm/dd/yy) and time (hh:mm) of last notification. Time is in military format (24-hour clock).
Time	Current date (mm/dd/yy) and time (hh:mm:ss). Time is in military format (24-hour clock).
Started	Date (mm/dd/yy) and time (hh:mm:ss) the system was last started. Time is in military format (24-hour clock).
Shutdown	The next date (mm/dd/yy) and time (hh:mm) Stratagy is scheduled to perform a scheduled shutdown for disk maintenance. Stratagy shuts down automatically and restarts. Time is in military format (24-hour clock).
Faxes	Not supported.
Port	Port number of each port, followed by the port's mode. For example, 1/A, 2/A, 3/N. Port Number: port number (1, 2, etc.) of each installed port channel. The ports may or may not be active (connected to a station port of the telephone system or a CO trunk/line). Port Mode: this port number's mode. **A**: answering port (if all ports are A, the system is in floating notification mode) **N**: notification port only (or system in process of notifying) **Note** If mode is **N** and status is idle, port has been designated exclusively for notification. In this mode, port no longer accepts incoming calls. See "n_ochan" on page 4-23 for more information.
User ID	Current User ID mailbox the port is accessing. If the port's status is IDLE, the last User ID mailbox accessed displays.

Table 3-2 Main Menu Screen Fields *(continued)*

Status	Function system is performing on the port. Includes:	
	IDLE:	Port is idle and available for calls.
	GREETING:	Mailbox greeting is currently playing.
	RECORDING:	Message currently being recorded.
	DIAL:	Stratagy is dialing out.
	RING:	Incoming call ringing is recognized.
	BUSY:	Dialed extension is busy.
	PCPM:	System tone patterns being analyzed.
	MAIL:	System prompts during message taking.
	ANSWER:	Stratagy has detected an answer after dialing out (transfer, paging).
	MENU: #:	Mailbox user menu choices are playing.
	EXECUTE:	Executing program of a mailbox (token programming).
	CHAIN:	Done, busy, or RNA chain is being executed. System accepting new incoming digits while greeting of a Mailbox is playing.
	LOGIN:	User in process of logging on to Mailbox.
	FIND:	Directory mailbox executing.
	NO ANSWER:	No answer detected during transfer or dial out.
Calls	Number of calls made or answered by the port.	
Last	Last time (hh:mm) the port started activity. **NEVER** displays if the port has had no activity since the system was last started.	

Configure Stratagy 4

CAUTION! **After making any significant program changes to the Stratagy, the system must be properly shutdown and restarted using "Shutdown and Restart Current Version" from the Shutdown menu. This procedure copies the most current database to the C:\Stratagy\Archive\Good directory for use by the Automatic System Recovery feature (see "Automatic System Recovery" on page 11-14). If this procedure is not followed and the system loses power, loss of customer information will result.**

This chapter provides detailed information about configuring Stratagy and discusses:

- Configuring Stratagy Admin software
- Toshiba Plug and Play
- Telephone System Configuration
- Stratagy System Configuration
- System Parameters
- Simplified Message Desk Interface (SMDI) Serial Integration

Configuring Stratagy Admin Software

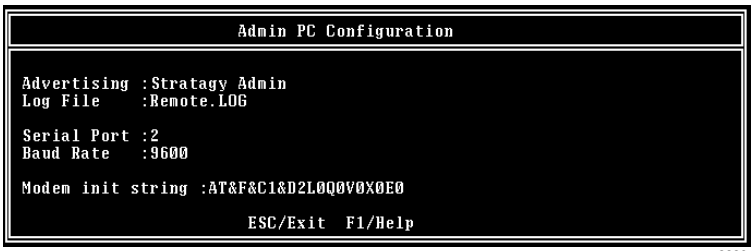
Settings for the communication port in Stratagy Admin must match the corresponding parameters set in the Stratagy System Configuration file on the IVP8.

For example, the Stratagy Admin PC serial port settings made in the *Serial Port* field of this procedure must be identical to the serial port definitions (i.e., *set serial_port*) set in the IVP8's System Configuration file (see "System Configuration" on page 4-13).

Note The menu screens detailed in this section are only available with Stratagy Admin version VSA.2G or later.

➤ **To configure Stratagy Admin software**

1. From the **C:\VSA3** DOS prompt, type **admin** and press **Enter**. The Stratagy Admin screen displays.
2. From the Stratagy Admin Main screen, press **2** or highlight the Configure Admin option and press **Enter**. The Admin PC Configuration screen displays (shown right).



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Note Press **F1** for help with any settings in the Stratagy Admin Configuration screen.

3. Make any changes needed. See Table 4-1 for a description of each of the fields.

Note Press **F2** in the *Serial Port* and *Baud Rate* fields to display a pop-up box with valid entries.

4. To save your changes, you must have the cursor in the last field (i.e., Modem Init String), and press **Enter** or the arrow down (↓) key

   ...or to exit without saving your changes, press **Esc** at any time.

   The program returns to the Stratagy Admin Main screen.

Table 4-1 Stratagy Admin PC Configuration Fields

Field	Description/Default
Advertising	Advertising string that displays when the Main Menu screen blanks after a specified number of minutes of inactivity (per *tmo_blank* parameter in the install.cfg file). Possible values: 60-character string. The single quotes are required. Default: 'Stratagy ADMIN'
Log File	System log file name. This log file contains connection information, any execution error information, and file copy actions. **Note** It is a good idea to periodically archive or delete this file once or twice a year, whenever you perform preventive maintenance. Possible values: Eight-character file name, plus three-character extension. The single quotes are required. Default: 'Remote.LOG'

Table 4-1 Stratagy Admin PC Configuration Fields *(continued)*

Field	Description/Default
Serial Port	Port number Possible values: 1~2 Default: 2
Baud Rate	Baud rate of serial port. Possible values: 1200, 2400, 9600 Default: 9600
Modem Init String	Sets modem initialization string. The modem initialization string can be changed to work with specific brand modems. Refer to the user's manual for your individual modem for the initialization string. **Note** The protocol used by Stratagy Admin does not support error correction, data compression, or auto baud rate adjustment. If problems are encountered connecting remotely, turn these parameters off on the Stratagy Admin PC modem. Refer to your modem user guide for instructions. Default: AT&F&C1&D2L0Q0V0X0E1 where: AT The command that tells the modem to come to Attention. &F Return to factory defaults. Instructs the modem to use the factory set parameters. &C1 Data Carrier Detect (DCD) signal. Set to on, it indicates presence of a data carrier. &D2 Data Terminal Ready selected. L0 Speaker volume. Off or low volume. Q0 Mode responses. Enables result codes to be issued to the screen. V0 Result code format. Numeric format. X0 Extended result codes. Disables monitoring of busy tones unless forced otherwise by country requirements. Sends only OK, connect, ring, no carrier, error and no answer result codes. E0 Command Character Echo. Disables echoing of the commands to the screen.

Tools Utility

This section discusses the Tools menu. For the Backup Utility, Restore Utility, Upgrade Stratagy Software, Retrieve Trace File and Filecopy functions, see Chapter 11 – Maintenance, Upgrades and Troubleshooting.

➤ **To access Tools Option**

1. Press **Alt**+**t**.
2. Type the password (the default password is **Stratagy**) and press **Enter**. See "Tools" on page 11-2 for a description of the menu options.

Toshiba Plug and Play

The Stratagy is pre-installed for the Strata CTX and Strata DK processors. If you need to change this selection to a different Strata telephone system, change it using this selection.

Note If you only want to change the PBX type, do not use this function. Instead, set the *pbx_type* parameter in the Stratagy System Configuration screen.

Selecting this function:

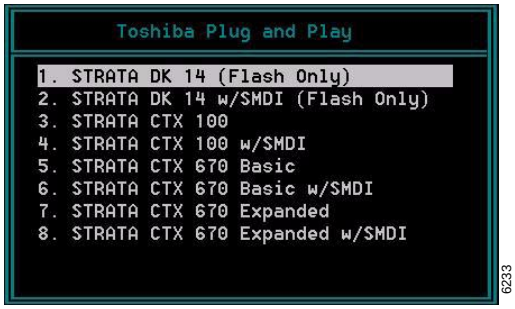
- Changes all the settings to the new Toshiba telephone system default values.
- Deletes any User ID mailbox customizations.
- Installs the Stratagy default mailboxes.

Note Existing messages and mailbox greetings are not deleted when Plug and Play is selected. For example, if Mailbox 200 has messages and greetings and Toshiba Plug and Play for Strata CTX is run, then Mailbox 200 retains the messages and greetings from the previous database.

Change Toshiba Plug and Play Option

1. From the Tools menu, press **5**.
2. From the Toshiba Plug and Play screen, enter the number of the selection.

   The Stratagy utility automatically defines the telephone system dial codes and tone patterns, system integration patterns and default mailboxes for the specific telephone system.
3. When the process is complete, press any key to reboot. The DOS prompt displays.



Telephone System Configuration

CAUTION! Take care when making changes and then restarting Stratagy. In some cases, if invalid information has been entered, Stratagy may not reboot correctly. (See "Automatic System Recovery" on page 11-14 for information on files created during an unsuccessful restart.)

This function modifies the following codes/integration patterns:

- Telephone System Dial Codes – Stratagy performs certain actions on your telephone system by using defined telephone system dial codes. To define the dial codes, you must modify the telephone system dial code parameters.
- System Integration Patterns – Enables modification to the telephone system integration patterns.

Note The telephone system configuration is set using the *pbx_type* parameter (see "pbx_type" on page 4-23 for details).

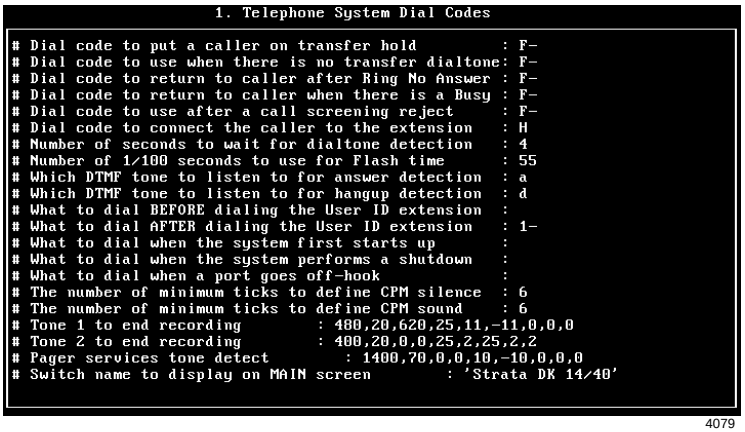
With this option, preset dial codes for other manufacturers' systems can be enabled or modified. As an example:

If your Toshiba telephone system is configured for tone first, you would:
1. Press **1** to Edit System Dial Codes.
2. From the Telephone System Dial Codes screen, delete the suffix –**1** from the line **What to dial AFTER dialing the User ID extension.**
3. Press **Esc**.
4. Press **2** to save your changes without restarting IVP8.

Select a Predefined Dial Code

1. From the Tools menu, press **4**. The Telephone System Configuration screen displays.
2. From the Telephone System Configuration screen, press **1**. The Telephone System Dial Codes screen displays (shown right).
3. To select a default setting, use the arrow keys (↑↓) and/or **Page Up** and **Page Down** keys to highlight your selection and press **Enter**

   ...or to cancel without selecting a dial code, press **Esc**.



Note Select a default dial code only for non-Toshiba telephone systems and only during initial configuration.

4. After making the selection, press **ESC**. The Telephone System Configuration screen displays.
5. From the Telephone System Configuration screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down and restarted. By shutting down and restarting Stratagy, the changes take effect.

...or **2**.The changes are transmitted to Stratagy but Stratagy is not shut down or restarted. Until you restart Stratagy, the changes do not take effect.

...or **3**. The changes you made are cancelled and not saved.

6. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.

Modify a Dial Code

If the telephone system you desire does not appear on the Telephone System Dial Codes Screen or further modifications to the dial codes are needed, you can modify a dial code parameter.

1. From the Tools menu, press **4**. The Telephone System Configuration screen displays.
2. From the Telephone System Configuration screen, press **1**. The Telephone System Dial Codes screen displays.
3. Use the arrow keys (↑↓) and/or **Page Up** and **Page Down** keys to highlight the dial code parameter and press **Enter**.

   The line appears at the top of the screen.
4. Modify the dial code using the line editor at the top of the screen.

   See Table 4-2 below for a listing of the dial code parameters and their definitions and settings.
5. After making the change(s), press **ESC**. The Telephone System Configuration screen displays.
6. From the Telephone System Configuration screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down and restarted. By shutting down and restarting Stratagy, the changes take effect.

   ...or **2**.The changes are transmitted to Stratagy but Stratagy is not shut down or restarted. Until you restart Stratagy, the changes do not take effect.

   ...or **3**. The changes you made are cancelled and not saved.
7. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.

Table 4-2 Telephone System Dial Codes - Definitions and Settings

Parameter/Description
 # Dial code to put a caller on transfer hold: The code Stratagy sends the telephone system, before attempting to transfer a call to an extension, to put the current call on “transfer hold” and send the transfer (or intercom) dial tone. Typical value: **F-** (hookflash)
 # Dial code to use when there is no transfer dialtone: The code Stratagy dials to return to the caller when: Stratagy is configured to verify transfer dial tone exists before attempting to transfer a call to the requested extension –and– transfer dial tone is not available. When this occurs, Stratagy treats the attempted transfer the same as a busy extension. Typical value: **F-** (hookflash)

Table 4-2 Telephone System Dial Codes - Definitions and Settings *(continued)*

Parameter/Description
 # Dial code to return to caller after Ring No Answer: The code Stratagy dials, during supervised call transfers, to request the telephone switch reconnect the caller to Stratagy when: The attempted extension rings –and– does not answer within a specified number of rings (configurable per User ID in Users Menu Maximum Rings field). Typical value: **F-** (hookflash)
 # Dial code to return to caller when there is a Busy: The code Stratagy dials, during supervised call transfers, to request the telephone switch reconnect the caller to Stratagy when the extension is busy. Typical value: **F-** (hookflash)
 # Dial code to use after a call screening reject: The code Stratagy dials, during supervised call transfers, to reconnect the caller and play the User ID's current greeting when: Call Screening is On –and– the extension called rejects the caller. Typical value: **F-** (hookflash)
 # Dial code to connect the caller to the extension: The code Stratagy dials, during supervised call transfers, to complete the call transfer after: Detecting an answer at the called extension –or– the extension called accepts the call when Call Screening is On. Typical value: **H** (hang up)
 # Number of seconds to wait for dialtone detection: The longest amount of time Stratagy waits for the telephone system to give Stratagy one second of dial tone. Setting this value to a number greater than zero enables Stratagy's dial tone detection. If your telephone system has a limited number of DTMF receivers or intercom paths for call transfers, there is always the possibility that one may not be available to Stratagy to perform a call transfer. Typical value: **4**
 # Number of 1/100 seconds to use for Flash time: Time Stratagy must remain on-hook while performing a hookflash. Typical value: **55** (just over one-half second)
 # Which DTMF tone to listen to for answer detection: Some telephone systems play a specific DTMF tone during a call transfer when the called extension answers. This provides faster answer detection and call processing. If your telephone system supports this feature, enter the DTMF tone. Typical value: **a**

Table 4-2 Telephone System Dial Codes - Definitions and Settings *(continued)*

Parameter/Description
 # Which DTMF tone to listen to for hangup detection: Some telephone systems play a specific DTMF tone whenever a caller hangs up. This provides faster hang up detection and call processing. If your telephone system supports this feature, enter the DTMF tone. Typical value: **d**
 # What to dial before dialing the User ID extension: The code Stratagy dials after dial tone detection and before dialing the extension number. Typical value: left blank
 # What to dial after dialing the User ID extension: Code Stratagy dials after dialing the extension number. Some applications use **1-** to eliminate (system wide) voice announce during a call transfer by Stratagy (necessary if you want Stratagy to perform supervised transfers). Use **H** to force all call transfers to be blind, or unsupervised.
 # What to dial when the system first starts up: Initialization codes Stratagy dials when it first starts-up, e.g., removing call forwarding on the Stratagy ports.
 # What to dial when the system performs a shutdown: Codes Stratagy dials when it shuts down; e.g., enabling call forwarding on the Stratagy ports.
 # What to dial when a port goes off-hook: Codes Stratagy dials whenever it goes off-hook to enable a special feature, such as special types of serial, or RS-232, integrations.

System Integration Patterns

If your telephone system supports integration, this selection controls the definition of its integration. Perform this step only to refine, verify, or modify the integration of the Stratagy system with your telephone system.

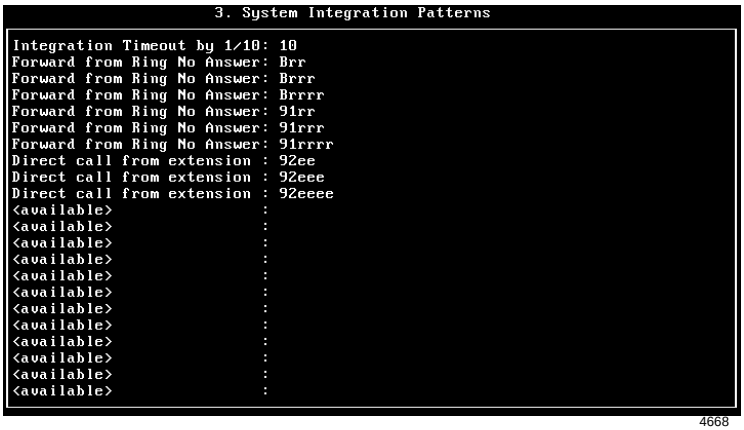
Some of the pre-defined telephone system dial codes already contain integration information, while others are configurable.

Define the System Integration Pattern Fields

1. From the Tools menu, press **4**. The Telephone System Configuration screen displays.
2. From the Telephone System Configuration screen, press **2**. The System Integration Patterns screen displays (shown right).
3. Define Integration Timeout by 1/10—amount of time Stratagy waits for integration information from the telephone system.

   Possible values: **0~99** (disable integration) (in 10ths of seconds).

   Suggested value: 10 (10 10ths = 1 second)



4. Define the remaining fields (i.e., integration strings) that Stratagy should match. Proceed to "Define the Integration Strings Stratagy Matches" on page 4-11.

   See Table 4-3 for definitions.
5. After making the change(s), press **ESC**. The Telephone System Configuration screen displays.
6. From the Telephone System Configuration screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down and restarted. By shutting down and restarting Stratagy, the changes take effect.

   ...or **2**.The changes are transmitted to Stratagy but Stratagy is not shut down or restarted. Until you restart Stratagy, the changes do not take effect.

   ...or **3**. The changes you made are cancelled and not saved.
7. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.

Table 4-3 Telephone System Integration Patterns – Definitions and Settings

Parameter/Definitions
Direct call Integration strings that Stratagy should match for a Direct call. **Example:***1eee**
Forward from Ring No Answer Integration strings that Stratagy should match for a forward from Ring No Answer. **Example:#02#sss#rrr#**
Forward from Busy Integration strings that Stratagy should match for a forward from Busy. **Example:#02#sss#bbb#**

Modify Integration Patterns

1. From the Tools menu, press **4**. The Telephone System Configuration screen displays.
2. From the Telephone System Configuration screen, press **2**. The System Integration Patterns screen displays.
3. From the System Integration Patterns screen, use the arrow keys (↑↓)

   ...or **Page Up** and **Page Down** to highlight the integration pattern parameter. Press **Enter**.
4. Modify the integration pattern using the line editor at the top of the screen.
5. After making the change(s), press **ESC**. The Telephone System Configuration screen displays.
6. From the Telephone System Configuration screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down and restarted. By shutting down and restarting Stratagy, the changes take effect.

   ...or **2**.The changes are transmitted to Stratagy but Stratagy is not shut down or restarted. Until you restart Stratagy, the changes do not take effect.

   ...or **3**. The changes you made are cancelled and not saved.
7. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.

Remove an Integration Pattern

1. From the Tools menu, press **4**. The Telephone System Configuration screen displays.
2. From the Telephone System Configuration screen, press **2**. The System Integration Patterns screen displays.
3. Use the arrow keys (↑↓), or **Page Up** and **Page Down,** to highlight the integration pattern parameter. Press **Enter**.
4. Press **Del** or the spacebar when the integration pattern parameter displays in the line editor at the top of the screen.
5. After making the change(s), press **ESC**. The Telephone System Configuration screen displays.
6. From the Telephone System Configuration screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down and restarted. By shutting down and restarting Stratagy, the changes take effect.

...or **2**.The changes are transmitted to Stratagy but Stratagy is not shut down or restarted. Until you restart Stratagy, the changes do not take effect.

...or **3**. The changes you made are cancelled and not saved.

7. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.

Define the Integration Strings Stratagy Matches

➤ Define the actual received codes with the call and the extension information. There are six character codes. Each character code represents a call state, and the placement and quantity of the code represents the extension information.

The character codes are:

r ring no answer

b busy

e direct dial (to access User ID directly by asking for security code)

s information regarding where the call came from (for handling message replies)

i immediate record (play the record tone and start taking a message)

x a wild card that matches anything (use this carefully)

You have complete control for changing Stratagy's integration behavior based upon your specific requirements. For example, if your customer does not want to allow for Busy extensions, then simply modify the integration character codes and replace the **b**'s with **r**'s.

Use Character Codes

The following example illustrates using the character codes.

- Direct Call

  Start with the Direct test call. There is a integration pattern labeled Direct Call in the description field. Part of the integration pattern should contain the extension number from where you called. Edit the integration pattern to replace the extension number with one or more **e**'s.

  Example:
  integration pattern displayed: *****1120**
  test extension you called from: **120**
  edit the dial code to read: *****1eee**

- Forward from Ring No Answer

  Under the Forward from Ring No Answer you should have two patterns. Both integration patterns should contain the extension number that was call forwarded to Stratagy. Part of one pattern probably contains the available extension number you called from. The other integration pattern may or may not contain information pertaining to the CO line where the call came from.

  Example:
  integration pattern displayed: **#02#101#120#** and **#03##120**
  available extension you called from: **101**
  test extension that was call forwarded: **120**
  edit the dial codes to read: **#02#sss#rrr#** and **#03##rrr#** respectively

- Forward from Busy

  The Forward from Busy is modified in the same way as the Forward from Ring No Answer above except that you use character code **b** instead of **r**.

Different Masks

Check that the integration patterns do not have the same "mask." If you do have one or more masks that are the same, you must modify them to be different or delete the extra ones. To test that integration pattern masks are different, do the following:

1. List the dial codes on a piece of paper.
2. Compress the dial codes by re-writing them without any character codes.

   What is left are dial code masks that must all be different.

   Example:
   Using the following dial codes: **`***1eee`**, **`#02#sss#rrr#`**, and **`#03##rrr#`**
   the integration pattern masks would be: **`***1`**, **`#02###`**, and **`#03###`**
   that are all different.

Additional Integration Patterns

Sometimes it is useful to have additional integration patterns that match the same way as the actual integration patterns except for the first character. For example you might want to add a second integration pattern for Direct calls (which had **`***1eee`** in our example) as **`**1eee`**. This helps to eliminate timing problems that sometimes arise from some telephone systems and Stratagy.

How Stratagy Matches Integration Patterns

The integration pattern strings are always sorted in like categories. When Stratagy receives a call, it uses a buffer to match against the defined integration pattern strings, and selects the first string that it matches.

Example 1:
integration pattern strings:
`01rrr`
`02bbb`
`03eee`
`xxrrr`

call Stratagy receives:
`02100`

integration pattern string Stratagy matches:
`02bbb`

Example 2:
integration pattern strings:
`xxrrr`
`01rrr`
`02bbb`
`03eee`

call Stratagy receives:
`02100`

integration pattern string Stratagy matches:
`xxrrr` (if on top, xxrrr always matched)

System Configuration

Use this function to change Stratagy's system options and parameters, define timeout values and computer configurations, and control per port options. See "System Parameters" on page 4-14 for a list of the parameters, their definitions and default settings.

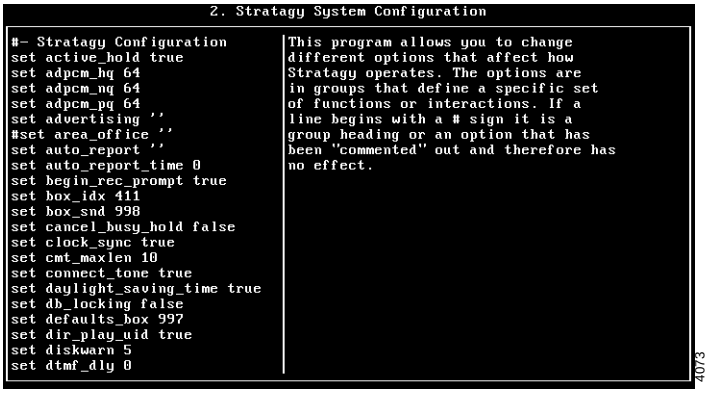
Most Stratagy System Configuration options *do not* require modification. We recommend that you modify the system password immediately. All other options have default values, but can be modified as required.

We recommend that you use the Stratagy Backup Utility initially and periodically to preserve system data. Before making changes to this selection, ensure you have a current backup. See "Backup Utility" on page 11-3 and "Restore Utility" on page 11-5.

Modify System Configuration Parameters

1. From the Tools menu, press **6**. The Stratagy System Configuration screen displays (shown right). The parameters are listed in alphabetical order.

   The Stratagy System Configuration Screen is split into two areas: the left lists the actual parameters and their values, the right lists context-sensitive help for each parameter.



Note Fax settings are not available to the Stratagy.

2. Highlight the parameter by using the arrow (↑↓)

   ...or **Page Up** and **Page Down** keys. Press **Enter**.

3. Modify the parameter using the line editor at the top of the screen.

   If a line begins with a **#**, it is a heading or a parameter that is "commented out" and is not active. To enable a parameter that is commented out, remove the starting **#** and set the value.

4. Press **ESC**.

5. From the Stratagy System Config screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down and restarted. By shutting down and restarting Stratagy, the changes take effect.

   ...or **2**. The changes are transmitted to Stratagy but Stratagy is not shut down or restarted. Until you restart Stratagy, the changes do not take effect.

   ...or **3**. The changes you made are cancelled and not saved.

6. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.

System Parameters

Most Stratagy System Configuration options *do not* require modification. We recommend that you modify the system password immediately. All other options have default values, but can be modified as required.

Parameter	Description
accept_0_calling_id	Specifies whether Stratagy should accept 0 as valid mailbox number. If the parameter is set to "false," SMDI packets that include 0 for the "forwarding from station number" (forwarded call SMDI packets) or for the "calling station number" (direct call SMDI packet) are not accepted. Possible values: false (mailbox 0 not accepted), true (mailbox 0 accepted) Default: false
active_hold	Controls what a caller must do to hold for a busy extension. True: Caller must continue pressing * to hold for a busy extension, enter another extension, or leave a message at the tone. False: Caller selects * once to hold for a busy extension and the system enables the caller to hold until he/she is either transferred, selects another extension, or presses * again to leave a message. Possible values: true, false Default: true
adpcm_hq	Sets the sampling rate for outgoing greetings. The higher the sampling rate, the better the sound quality; however, the amount of disk space used is also higher. **CAUTION! If you change this parameter on an active system, all previously recorded greetings are lost.** Possible values: 24, 32, 64 Recommended value: 64 (Flash: 24) Default: 64
adpcm_nq	Sets the sampling rate for incoming messages. The higher the sampling rate, the better the sound quality; however, the amount of disk space used is also higher. **CAUTION! If you change this parameter on an active system, all previously recorded messages are lost.** Possible values: 24, 32, 64 Recommended value: Flash: 24, IVP8: 64 Default: 32
adpcm_pq	Sets the sampling rate for the system prompt file. This is predetermined by the sampling rate at which the system prompt file was recorded. **CAUTION! Do not change this value unless you have installed the appropriate system prompt file.** Possible values: 8, 24, 32, 64 Recommended value: 64 (Flash: 24) Default: 64
advertising	Advertising string that displays when the Main Menu screen blanks after a specified number of minutes of inactivity (per *tmo_blank*). Possible values: 58-character string. The single quotes are required. Default: No default

Parameter	Description
area_office	When SMDI is being used on a Centrex switch, the value set in this parameter identifies which calls are from voice mail subscribers by specifying the first few digits (e.g., area and office codes) that are shared by all subscribers. Example: In this example, the *area_office* parameter is set to '714583'. When a call arrives from any telephone number with the first digits of "714583," the SMDI subsystem processes it as a subscriber call. If a call arrives and the switch tells Stratagy that the first six digits are not "714583," the SMDI subsystem treats the caller as external. Note that the value of *area_office* does not need to be only six digits long. If subscribers share the first five digits of their telephone numbers, then just those five digits should be stored in this field. Possible values: up to 10 numeric digits, any combination Default: (no default) (To enable, remove the starting # and set the value.)
auto_report	Report definition file, (created using Stratagy's Main Menu's Reports option. Generates a report automatically at the time specified by *auto_report_time*. Example: 'daily.rpt' Possible values: valid DOS file name. The single quotes are required. Default: (no report name)
auto_report_time	Time of day the automatic report generates using the file specified in *auto_report*. The value is in 24-hour format with the colon (:) omitted. Example: 1:30 a.m. is 0130 2:15 p.m. is 1415 Possible values: 0 (does not generate the *auto_report*), 0001~2400 Default: 0
begin_rec_prompt	Whether the system says "Begin recording at the tone, ... or hang up" before taking a message. This also affects the "to re-record press 2" and "to append press 3" menu selections given after a recording. True: The system plays the above prompt. False: The caller only hears a tone. Possible values: true, false Default: true
box_idx	Sets the Directory User ID for all ports or for specified ports. The Directory is a special mode that enables Stratagy to search its User IDs for a match on the *Directory Name* fields. For more information about the Directory, see Chapter 9 – Special Greeting User ID Mailboxes. Example: Define this parameter as *box_idx* 411 1 to set User ID 411 as the directory search ID for port 1. If no port is defined, then 411 is enabled for all ports. **Note** Stratagy builds an index file based on information given in the *Directory Name* fields. It enables you to use one or more letters to perform the search, matching all entries possible. For every User ID that matches, Stratagy plays the name recording—which really may play any recording you want, if available. Possible values: valid User ID and valid port Default: 411 – enabled for all ports.

Parameter	Description
box_snd	Sets the Direct Message User ID for all ports or for specified ports. The Direct Message ID enables Stratagy to record a message for a User ID without having to execute the *Extension* field and/or hear the User ID's greeting. This is particularly useful for an Operator transferring directly to voice mail. Example: Define this parameter as *box_snd* 998 1 to set User ID 998 as the Direct Message User ID for port 1. If no port is defined, then 998 is enabled for all ports. Possible values: valid User ID and valid port Default: 998 – enabled for all ports.
cancel_busy_hold	Enables callers to hold for busy extensions. True: Callers cannot hold for busy extensions. Calls proceed as if a Ring No Answer. False: Callers can hold for busy extensions. Possible values: true, false Default: false
clock_sync	Re-synchronizes the DOS software clock with the PC hardware clock. It may be useful to turn this off (by setting it to False) if you have another utility controlling the PC clock. True: Stratagy re-synchronizes the DOS software clock with the PC hardware clock. False: Stratagy does not re-synchronize the clocks. Possible values: true, false Default: true
cmt_maxlen	Number of seconds for recording a list comment for the User parameter of Manage Your Lists. Possible values: 1~99 (seconds) Default: 10
connect_tone	A beep plays when completing a transfer. True: Stratagy plays a beep when completing a transfer. False: Stratagy does not play a beep when completing a transfer. Possible values: true, false Default: true

Parameter	Description
console_slot_id	Identifies to IVP8 the physical slot in the Strata DK that contains the PDKU programmed for DSS console in Program 03 (type 64). The IVP8 monitors this slot for the busy lamp field (see *dss_active* parameter), and Night Transfer. **For Strata DK40i/DK40/DK16e/DK16 and DK24, DK56, and DK96**: the *console_slot_id* is always set to 0 (zero). Slot ID 0 corresponds to card slot S11 for DK40i/DK40/DK16e/DK16 or slot 01 for DK24, DK56, and DK96. **CAUTION! For Strata DK16: If this parameter is set to 1, IVP8 is disabled. All ports return "ring no answer" when dialed.** **For Strata CTX100/CTX670, DK424i/DK424 and DK280:** set this parameter per the following table. CTX100/CTX670 DK424i/DK424/DK280 Slot Assignment → Console_slot_id 11, 31, 51 → 0 12, 32, 52 → 1 13, 33, 53 → 2 14, 34, 54 → 3 15, 35, 55 → 4 16, 36, 56 → 5 **Important!** *For this feature to work, the PDKU must reside in an odd numbered cabinet (see Figure 2-1 on page 2-10 for examples).* *In all applications, the IVP8 must reside in a higher-numbered slot in the same cabinet or next even numbered cabinet as the PDKU card (defined as console_slot_id).* Possible values: 0~5 Default: 0 (zero) IVP8 only
daylight_saving_time	Resets Stratagy's system time to daylight savings time. **Note** The current setting is displayed at the top right corner of the Main Menu. True: Stratagy sets the system automatically to daylight savings time at 2:00 a.m. the first Sunday in April and the last Sunday in October. False: Stratagy does not reset system time and continues with standard time (Stratagy clock). **Important!** *(IVP8 only) Setting the ksu_time parameter to true disables this setting.* Possible values: true, false Default: true
db_locking	Locks a database's records before Stratagy reads them. True: Stratagy tries to lock a database's records before reading them (read only). False: Stratagy does not lock the database's records. Possible values: true, false Default: false

Parameter	Description
defaults_box	Designates the User ID Defaults Box Stratagy uses for the default values when creating a new User ID. The field values in the Defaults Box User ID are copied into a new User ID upon initialization. • User's Information fields are not copied. The User ID field contains the new User ID you specified. *Comment*, *Extension*, and *Directory Name* fields are not defined. If a *Security Code* is defined, Stratagy uses it instead of the User ID as the default. • Since guests can only access the User ID that created it and other guests of that User ID, Stratagy defines *Group1* as the User ID of the mailbox that created it. For example, if the Guest User ID was created by User ID 76, then *Group 1*'s value is 76. • All other Users Menu Options and Group/Chains fields are copied. All Notify and Auto records are copied. • Define the Defaults Box settings before creating User IDs. This initializes all new User IDs with a minimum number of settings. This is useful for setting default settings such as message light On/Off. Except for Group field values, this parameter operates in the same manner as the *guest_default*s parameter. Possible values: valid User ID Default: 997
dir_play_uid	Directory search feature plays the User ID of the mailboxes that it finds. True: If a name recording is available, the caller hears both the name recording and the digits for that person's User ID. If a name recording is not available, just the digits play. False: If a name recording is available, the caller hears only the recording. If there is no name recording, Stratagy does not present the entry. Possible values: true, false Default: true
diskwarn	Percentage threshold Stratagy uses for causing a Disk Notify to execute. This is a remaining percentage threshold. Example: To have Stratagy notify you when the remaining flash drive space falls below 20%, use a value of 20. For Stratagy to notify a user (usually the System Administrator) when flash drive space is low, create a Notify record with the *Type* field set to DISK (see "Notify Menu" on page 6-27). Possible values: 1~99 Default: 5
dss_active	IVP8 monitors the Busy Lamp Field (BLF) indicators on the Strata CTX/Strata DK's DSS console port to determine if an extension is busy before attempting to transfer. This parameter corresponds with the *DSS Port* field assignment in the Users Option Menu of a User ID. True: IVP8 monitors the BLF indicators before attempting to transfer a call. False: IVP8 does not monitor the BLF indicators. **Important!** *If this parameter is set to false, the DSS Port field on the Users Option Menu is disabled.* Possible values: true, false Default: false IVP8 only

Parameter	Description
dtmf_dly	Controls the time between DTMF tones when Stratagy is dialing. 0: The time is country-dependent (50 ms in the US, 80 ms in the UK). This is appropriate for almost all cases. Possible values: 0, 3~19 (units of 10 ms) Default: 0 IVP8 only
dtmf_gate	Stratagy, before dialing any User ID *Extension* field, first verifies that DTMF was entered since the call last accessed the User ID (usually Caller Instructions User ID 991) specified in the *Done* chain of the initial User ID (usually Company Greeting User ID 990). This "gate" prevents the transfer of a dead/phantom call to the Operator on those switches that do not have disconnect supervision. True: Stratagy gates by requesting the caller to "Say yes at the tone" to complete the chain and transfer. False: Stratagy does not complete the chain and transfer by requesting the caller to "Say yes at the tone." **Note** Regardless of this parameter setting, Stratagy does not perform the "gate" action when the *Extension* field begins with @. Possible values: true, false Default: true
dtmf_on	Controls length the system plays the DTMF tones. Example: 20 is .2 sec (200 ms). Possible values: 10, 20, ..., 90 (units of 10 ms) Default: 20 (.2 sec)
error_box	Box that receives a notification if the system encounters a panic error on startup. The notification runs when the system successfully recovers. Possible values: valid User ID Default: 999
future_delivery	Future delivery enables users to specify the time and/or date when a message is delivered. When the messages are awaiting future delivery, they are stored in the User ID specified in this parameter. Therefore, the Future Delivery User ID cannot be used for any other purpose. The future delivery messages in this User ID cannot be deleted or listened to by accessing this User ID mailbox. This User ID mailbox cannot be accessed by a security code. The originator of the future delivery message can delete or listen to the message from his\her User ID, using the Future Delivery Review parameter of Play Messages. Possible values: valid User ID Default: 995 IVP8 only
gain_norm	Starting volume of the ports. 1. The **^( )** token enables you to change the volume of the current port to the specified level (see Chapter 7 – Token Programming). 2. For the user, the current port volume can be set through the Users Menu's Message Volume field and by the user with the Play Message Controls (see Chapter 6 – Menus). Possible values: -10, -9, ..., 0, ..., 4, 5 Default: 0

Parameter	Description
guest_defaults	Designates the Guest User ID Defaults Box Stratagy uses when creating a new Guest User ID. The field values in the Guest Defaults User ID are copied into a Guest User ID upon initialization. • User's Information fields are not copied. The User ID field contains the new User ID you specified. *Comment*, *Extension*, and *Directory Name* fields are not defined. If a *Security Code* is defined, Stratagy uses it instead of the User ID as the default. • Since guests can only access the User ID that created it and other guests of that User ID, Stratagy defines *Group1* as the User ID of the mailbox that created it. For example, if the Guest User ID was created by User ID 76, then *Group 1*'s value is 76. • All other Users Menu Options and Group/Chains fields are copied. All Notify and Auto records are copied. • Define the Guest User ID Defaults Box settings before creating Guest User IDs. This initializes all new Guest User IDs with a minimum number of settings. This is useful for setting default settings such as message light On/Off. Except for the Group field values, operates the same way as the *defaults_box* parameter. Possible values: valid User ID Default: 996 IVP8 only
guest_max	Highest numbered Guest User ID. When used with the *guest_min* parameter, limits the number of Guest User IDs that can be created. Example: If this value is 90199, then the last Guest User ID that may be created is User ID 90199. Possible values: valid User ID larger than the *guest_min* parameter setting Default: 90199 IVP8 only
guest_min	Lowest numbered Guest User ID. When used with the *guest_max* parameter, limits the number of Guest User IDs that can be created. Examples: If this value is 90000, then the first Guest User ID that is created has User ID 90000. The second guest has User ID 90001, etc. Possible values: valid User ID smaller than *guest_max* parameter setting Default: 90000 IVP8 only
hangup_supervision	Whether the switch supports Loop Current Off/Drop for hang up supervision. True: If your switch supports Loop Current Off/Drop for hang up supervision, this parameter should be true. Even if your switch does not support this capability, it usually has NO NEGATIVE EFFECT when set to true. False: If you notice call transfer problems such as disconnects or three-way conferencing, try setting this parameter to false. If the problems are not solved by setting this parameter to false, set it back to true. Possible values: true, false Default: true

Parameter	Description
hot_box	User ID Stratagy "jumps" to when Stratagy detects a specific tone. Used to handle incoming faxes, detect connections from TDD machines for deaf communication, etc. Up to 24 tones can be detected and directed to a mailbox by entering a User ID followed by a number (1~24). To add a specific tone, such as a Fax connect tone, to the tone table, it must be one of the first four tones defined, and it must be marked as a "terminating tone." The PCPM code associated with the tone must be in the range 13~36, which corresponds to hot_boxes 1~24. If no number is defined after the User ID, Stratagy directs calls that emit an industry standard Fax CNG tone of a specific frequency (factory defined in the tone table) to the defined User ID. Syntax: set hot_box XXX Y Where: XXX = User ID Y = hot box number (1~24) If Y is omitted, all 24 hot boxes are set to the User ID entered. For example: set hot_box 994 sets all 24 to User ID 994 set hot_box 994 1 sets the first hot_box to User ID 994 Possible values: valid User ID, possibly followed by a *hot_box* value (1~24) Default: 994
ksu_time	Synchronizes IVP8's system clock with the system clock of the supporting Strata CTX/Strata DK telephone system. Information obtained by IVP8 from the Strata CTX/Strata DK system does not contain "second" time; therefore, there may be a 1~60 second difference between the Strata CTX/Strata DK system and the KSU time displayed on the main menu of the Stratagy Admin program. **Important!** *The IVP8 electronically monitors the clock information on the LCD of the defined PDKU port. If other LCD messages (e.g., message waiting callback information) appear over the system time, the IVP8 is unable to consistently synch to the KSU time.* True: IVP8 synchronizes the IVP8's system clock with the Strata CTX/Strata DK's system clock. The KSU time displays at the top right corner of the Main Menu. Setting this parameter to true, disables the *daylight_saving_time* parameter. False: IVP8 does not use the Strata CTX/Strata DK's system clock. **Important!** • *The Strata DK uses a 24-hour system clock, but does not notate a.m./p.m. on the LCD display. Because of this, during the initial installation or when the system has been shut down for any extended time, it is necessary to program the correct date and time in the IVP8 Main Menu, Date/Time function or via System Administrator's mailbox.* • *This feature requires SMDI integration to work with the Strata CTX.* Possible values: true, false Default: false IVP8 only
lcoff	Minimum duration of loop current off before the RDSP driver posts event 20 to the System Event Queue. In 10 ms units. Default: comment line (#set lcoff -10) To enable, remove the starting # and set the value.

Parameter	Description
lcvalid	Delay that must occur after dialing a digit string and before the RDSP driver considers the loop current drop to be answered. In 10 ms units. Default: comment line (#set lcvalid 10) To enable, remove the starting # and set the value.
lcwait	Delay that must occur after loop current drops and before the RDSP driver posts event 18 to the System Event Queue. In 10 ms units. Default: comment line (#set lcwait 10) To enable, remove the starting # and set the value.
login_pound	Stratagy prompts “Finish by pressing the pound sign” when requesting the User ID or the security code during log on. If the system is configured with fixed-length User IDs (by changing the values of a *fixed_lenX* parameter), users may be confused if they hear this prompt and attempt to enter a pound sign (**#**). True: Stratagy says the prompt. False: Stratagy does not say the prompt. Possible values: true, false Default: true
lognam	System log file name. This log file contains start-up information, any execution error information, system actions, and shutdown information. **Note** It is a good idea to periodically archive or delete this file once or twice a year, whenever you perform preventive maintenance. Possible values: valid DOS file name. The single quotes are required. Default: ‘Stratagy.LOG’
max_dl_inits	Number of simultaneous ports that can go off-hook and dial the telephone system initialization code. This is necessary because some switches are blocking. Possible values: 1, 2, ..., number of ports Default: 2
max_prompt	Number of times a prompt should repeat before hanging up. Possible values: 1~9 Default: 2
minmsg	Sets the threshold for keeping or discarding messages. A message recording to be considered valid and kept must be at least as long as this setting. Shorter recordings are discarded. In 100 ms units. Default: 10 (1 second)
msg_log	Logs every received message and User ID that checks for messages, along with the DTMF entered. **Note** When active, grows quickly. Archive or delete frequently. Possible values: valid DOS file name. The single quotes are required. Default: ‘MSG.LOG’ (To enable, remove the starting # and set the value.)
msg_pending_threshold	Number of seconds that a message must play before it is considered “pending.” Possible values: 3~10 seconds Default: 5

Parameter	Description
nam_maxlen	Maximum number of seconds for recording a User ID's name and extension. The name and extension recording is used for directory access and whenever Stratagy tries to identify the User ID. Possible values: 1~99 (seconds) Default: 5
n_msg_scan	Threshold for message count. When a user logs onto their mailbox, if the total number of messages (i.e., new, saved, pending, urgent) is less than the number defined in this parameter, Stratagy scans the number of messages and reconciles the message count if an error is encountered. Possible values: 0~99 Default: 0 (no message scan at log in time)
n_ochan	Number of dedicated ports (starting with the highest port) to reserve for outbound notify ports. This number must not exceed the total number of available ports. When set, the defined port does not accept incoming calls. **Important!** *If the value is set to 0, Stratagy attempts to use the highest numbered IDLE port. The danger of this is that Stratagy may inadvertently begin a notification on a port with an incoming call.* Possible values: 0~24 (number of ports) Default: 0
notify_restriction	Restricts Notify to only the defined port. The port still takes incoming calls. This is particularly useful for those switches that require message lights to be turned off by the same port that turned them on. Possible values: 1, 2, ..., highest port number Default: 1 (To enable, remove the starting # and set the value.)
partial_q_ok	Enables the **Q( )** token to save the message even though all prompts are not completed. True: **Q( )** token saves the messages. False: Messages are not saved if prompts are not completed. Possible values: true, false Default: false (To enable, remove the starting # and set the value.)
password	Sets the system password. The password is case sensitive; i.e., uppercase letters are different from lowercase letters. Possible values: up to eight alphabetical characters. The single quotes are required. Default: 'Stratagy'
pbx_type	Defines the model of Strata CTX/Strata DK that is used as the host system. Possible values: DK8, DK16, DK16E, DK24, DK56, DK96, DK14/40, DK14/40S (DK24/40 with SMDI), DK280, DK280S (DK280 with SMDI), DK424i, DK424, DK424S (DK424 with SMDI) Default: DK424i/DK424

Parameter	Description
play_caller_id	Determines whether outside Caller ID is announced when the Caller ID is available. **Note** This parameter works in conjunction with SMDI integration. True: When a message plays from an outside caller and a caller ID is available, the ID is announced in the place of the from field during the message header playback. False: Caller ID never plays. Possible values: true, false Default: true
play_skip	Number of seconds to rewind or skip forward during message playback when a user presses ***** or **#**. Possible values: 1~99 (seconds) Default: 5
please_hold	System announces “Please hold while I try that extension” before transferring a caller. True: The system plays the above prompt. False: The system does not play the above prompt and immediately executes the *dl_dtwait* string or the *Extension* string, as appropriate. Possible values: true, false Default: true
prompt_file	Default prompt file that Stratagy uses on an incoming call. This enables you to redefine the default language prompt file from English. It does not preclude you from changing the prompt file during the call. Possible values: valid prompt file. The single quotes are required. Default: ‘English’
purge	Number of days before a message is set for purging/deletion. Whenever a user accesses his/her User ID and presses **1** to Play Messages, the system tells the user how many messages will be automatically deleted when he/she exits the Main Menu. **CAUTION! Once a message is deleted by purging, there is no way to retrieve it.** Possible values: 0 (purging disabled), 1~99 (days) Default: 0
restore_config	If the Stratagy system encounters a panic error on start-up, this parameter determines whether Stratagy restores the last known good configuration during the Automatic System Recovery process. **Note** If you set this parameter to True, you must shut down and restart on the current software version. This ensures that if an error is encountered during boot up the Stratagy reboots using the most current database. True: System restores the last known good configuration if it panics on start-up. False: System does not restore the last known good configuration if it panics on start-up. Possible values: true, false Default: true

Parameter	Description
restore_original	If the Stratagy system encounters a panic error on startup, this parameter determines whether Stratagy restores the original configuration during the Automatic System Recovery process. True: System restores the original configuration if it panics on start-up. False: System does not restore the original configuration if it panics on start-up. Possible values: true, false Default: true
security_max_length	Maximum length of the security code that Stratagy accepts as a new security code when a user attempts to change it from a telephone. Setting this parameter equal to the security_min_length parameter, creates "fixed-digit" security codes. When fixed-digit security codes are enabled, there is no longer a requirement for the user to press **#** after entering a security code during log on. **CAUTION! Security_max_length must be equal to, or greater than, the security_min_length parameter setting.** Possible values: 1~16 Default: 16
security_min_length	Minimum length security code that Stratagy accepts as a new security code when a user attempts to change it from a telephone. Possible values: 1~16 Default: 1
short_direct_send	What Stratagy plays when the Direct Message User ID (usually 998) is entered followed by the User ID. (The Direct Message User ID is set using the *box_snd* parameter.) True: "You entered" and the User ID's name recording plays. False: User ID's current greeting plays (as if a Ring No Answer was received). Possible values: true, false Default: false
shutdown	Designated day and time Stratagy performs automatic shutdown for flash drive maintenance. The first value between the single quotes is the day of week, where: 0 Sunday 4 Thursday 1 Monday 5 Friday 2 Tuesday 6 Saturday 3 Wednesday -1 everyday The second value between the single quotes is the hour and minute when the shutdown occurs. Use the 24-hour format with the colon (:) omitted. Example: 3:30 a.m. on Monday is '1 330' Default: '2 130' (Tuesday at 1:30 a.m.)
skip_name_announce	Sets the name announcement at user log on. True: System skips the name announcement at log-on. False: System announces the user's name at log-on. Possible values: true, false Default: false

Parameter	Description
tape_length	When a User selects option **1** (Play Messages), and then **78** (continuous play) or **76** (continuous delete), this parameter defines the total number of minutes to play or delete. Usually defines the length of one side of a tape that might be used for recording a set of messages in a User ID. Possible values: 00, 10~99 (minutes). Setting the value to 00 disables the Playback and Delete Continuous features. Default: 30
timestamp_forwards	Controls the date/time stamp the system uses on a forwarded message. True: Uses the date/time that the message was forwarded. False: Uses the original date and time the message was first recorded. Possible values: true, false Default: true
tmo_2digit_menu	Amount of time Stratagy waits to receive the second digit after receiving the first digit of a two-digit menu selection. Example: When playing a message, * means rewind 5 seconds, while *1 means replay the current message. If the user presses * and doesn't enter the **1** until after this time elapses, Stratagy processes the digit entered and rewinds 5 seconds. Possible values: 10~99 (units of 100 ms) Default: 12 (1.2 seconds)
tmo_blank	Total number of minutes Stratagy waits before blanking the Main Menu screen to prevent screen burn-in. **Note** This parameter only blanks the screen if the current screen is the Main Menu. The *advertising* parameter contains the string that displays when the Main Menu screen is blanked. Possible values: 0 (disabled), 1~99 (minutes) Default: 5
tmo_dtmf	Amount of time Stratagy waits to determine the caller has finished entering DTMF digits (provided the caller does not press **#**). Possible values: 10~99 (units of 100 ms) Default: 12 (1.2 seconds)
tmo_dtmf_login	Amount of time Stratagy waits to determine the caller has finished entering DTMF digits (provided that the caller does not press **#**) when entering the User ID and security code during the log in process. Possible values: 10~99 (units of 100 ms) Default: 20 (2 seconds)
tmo_hold	Number of seconds before Stratagy attempts to transfer a call after the caller has pressed * to hold for a busy extension. When a caller presses * to hold for a busy extension, Stratagy plays a file called C:\Stratagy\HOLD.VOX and then attempts to transfer the call. If that file is missing, Stratagy is silent for the number of seconds specified by this parameter. **Note** To have callers hear a specialty recording while on hold, record over HOLD.VOX by accessing the System Administration Menu. See the *System Administrator Guide* for details. Default: 20 (seconds)

Parameter	Description
tmo_idle	When this value is greater than 0, it enables a special function in Stratagy to go off-hook and back on-hook whenever a port is idle for the specified number of seconds. This is necessary only when under rare circumstances a telephone switch may not release a station that is connected to Stratagy even after Stratagy has gone on-hook. Possible values: 0 (disabled), any number (seconds) Default: 0
tmo_menu	Amount of time Stratagy waits before repeating a choice menu. Possible values: 1~99 (units of 100 ms) Default: 20 (2 seconds)
tmo_pickup	Minimum amount of time the system waits between an on-hook and off-hook event. Possible values: 10~99 (units of 100 ms) Default: 20 (2 seconds)
tmo_resume	Number of seconds Stratagy pauses while playing or recording a message. If this period elapses and the user does not tell Stratagy to resume, Stratagy automatically continues to play messages (during playback) or cancels the recording (during recording). Possible values: 0~ 255 (seconds) Default: 30 (seconds)
tmo_silence	Maximum amount of silence time the system waits before deciding to finish a recording and hang up. Possible values: 3~15 (seconds) Default: 15 (IVP8 = 5)
tmo_sound	Maximum amount of sound/dial tone time the system waits before deciding to finish a recording and hang up. Possible values: 0~9 (seconds) Default: 0 (IVP8 = 5)
trace_cap	Defines the size of the TRACE.OUT file in kilobytes. When the size of the file reaches its defined maximum, new data begins to overwrite the oldest data in the file, generating a continuous loop of information. Possible values: Values vary depending on the amount of Trace information required and the space available on IVP8's flash drive. If this value is set high, it could take an excessive amount of time to copy the file to the portable/desktop computer. A standard setting is 1440 for copying the file to the portable/desktop computer's floppy-disk drive. Default: 1000 (kilobytes = 1 megabyte)
use_pvc	Whether Stratagy enables the voice board driver's Positive Voice Control feature when dialing and expecting a voice to answer. True: Driver's Positive Voice Control feature enabled. False: Driver's Positive Voice Control feature **not** enabled. On some switches, setting this value to false avoids false answer detects. Possible values: true, false Default: true

Parameter	Description
user_log	Whether the system makes an entry in the specified log file whenever a User ID is accessed via DTMF. The log entry consists of the date, time and User ID. This is useful for creating a data file that can later be analyzed for call distributions and dates, days, and times mailboxes are accessed. **Note** When active, grows quickly. Archive or delete frequently. Possible values: valid DOS file name. The single quotes are required. Default: 'USERID.LOG'(To enable, remove the starting # and set the value.)
Serial Port Definition	
baud1	Baud rate for logical serial port 1. This operates on the physical COM port as defined by *serial_port1*. Possible values: 300, 1200, 2400, 9600, 19200. Default: 2400
baud2	Baud rate for logical serial port 2. This operates on the physical COM port as defined by *serial_port2*. Possible values: 300, 1200, 2400, 9600, 19200. Default: 2400
databits1	Number of data bits for logical serial port 1. Possible values: 7, 8 Default: 8
databits2	Number of data bits for logical serial port 2. Possible values: 7, 8 Default: 8
parity1	Parity to use for logical serial port 1. Possible values: none, even, odd, mark, space Default: none
parity2	Parity to use for logical serial port 2. Possible values: none, even, odd, mark, space Default: none
serial_port1	In order for Stratagy to communicate with peripheral devices connected to COM/RS232 ports, it needs to know which ports are connected. There is a mapping from the port that Stratagy knows to the physical port on the computer. This mapping is defined by this parameter. To define serial port 1 as active, simply define the COM port where it should be mapped. Examples: Set this parameter to 1 to connect serial port 1 (Stratagy) to COM1. Possible values: 0 (not connected), 1 (COM1), 2 (COM2), 3 (COM3), 4 (COM4) Default: 0
serial_port2	In order for Stratagy to communicate with peripheral devices connected to COM/RS232 ports, it needs to know which ports are connected. There is a mapping from the port that Stratagy knows to the physical port on the computer. This mapping is defined by this parameter. To define serial port 2 as active, simply define the COM port where it should be mapped. Examples: Set this parameter to 2 to connect serial port 2 (Stratagy) to COM2. Possible values: 0 (not connected), 1 (COM1), 2 (COM2), 3 (COM3), 4 (COM4) Default: 0

Parameter	Description
stopbits1	Number of stop bits to use for logical serial port 1. Possible values: 0, 1, 2 Default: 1
stopbits2	Number of stop bits to use for logical serial port 2. Possible values: 0, 1, 2 Default: 1
Serial Port Definition (Remote PC — Stratagy Admin)	
admin_port	In order for Stratagy to communicate with the Stratagy Admin PC connected to one of its serial ports, Stratagy needs to know which port is to be used. This parameter defines the logical port that Stratagy software uses. Example: Set this parameter to 1 for logical serial port 1. **CAUTION! The connection may fail if the baud parameter for this port is set higher than 9600 or the serial port definitions for this port do not correspond to the definitions for the COM port being used on the Stratagy Admin PC.** Possible values: 1 (COM1), 2 (COM2) Default: 2
AMIS Configuration Audio Messaging Interchange Specification (AMIS) is the analog networking protocol that enables Stratagy to pass voice messages to any remote voice mail system that supports the AMIS protocol. See Table 9-1 on page 9-4 of Chapter 9 – AMIS Networking for complete descriptions of all AMIS parameters.	
SMDI/Serial Integration Definition Stratagy can enable Simplified Message Desk Interface (SMDI) protocol to provide a RS-232 integration with telephone systems that also have SMDI capabilities. This integration is used with Centrex installations. See Table 4-4 on page 4-33 of "SMDI Serial Integration" on page 4-32 for complete descriptions of all SMDI parameters.	
Per Port Definitions	
box_grt	Sets the starting User ID for the port given as the last value. Examples: box_grt 990 1 means that on port 1, a new call starts at User ID 990. Possible values: valid User ID and valid port Default: 990 1 990 2 . . . 990 8

Parameter	Description
n_rings	Number of rings to wait before answering per port. This is useful for those telephone systems that do not allow incoming lines to ring in a station hunt group or do not provide delayed ringing. Also, it may be used to set up backup answering for a secondary attendant operation. **Note** There is a side effect. When a user wants to pickup his messages, he must wait the specified number of rings before Stratagy answers. Example: To have port 1 answer on the second ring, use set n_rings 2 1. Possible values: 1~9 (number of rings); valid port number Default: 1 1 1 2 . . . 1 8
Fixed Length User IDs The fixed length of a User ID is based on its first digit.	
fixed_len0	Maximum digits Stratagy expects when a caller dials a User ID beginning with zero. There is only one User ID mailbox that can have zero as its first digit, and that is User ID 0. If the value of this parameter is changed to 1, and a caller dials 0 in a place where a User ID mailbox number is expected, then Stratagy immediately accepts the 0 as the User ID mailbox number and goes to the next processing step. If the parameter's value is left at 8, then a timeout or pound sign (#) is required to terminate the User ID. This latter procedure is compatible with earlier versions of Stratagy. Possible values: 1~8 Default: 8
fixed_len1	Maximum digits Stratagy expects when a caller dials a User ID beginning with one. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five-digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8
fixed_len2	Maximum digits Stratagy expects when a caller dials a User ID beginning with two. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Default: 1~8 Default: 8

Parameter	Description
fixed_len3	Maximum digits Stratagy expects when a caller dials a User ID beginning with three. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8
fixed_len4	Maximum digits Stratagy expects when a caller dials a User ID beginning with four. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8
fixed_len5	Maximum digits Stratagy expects when a caller dials a User ID beginning with five. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8
fixed_len6	Maximum digits Stratagy expects when a caller dials a User ID beginning with six. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8
fixed_len7	Maximum digits Stratagy expects when a caller dials a User ID beginning with seven. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8
fixed_len8	Maximum digits Stratagy expects when a caller dials a User ID beginning with eight. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8

Parameter	Description
fixed_len9	Maximum digits Stratagy expects when a caller dials a User ID beginning with nine. When changing this value, make certain that it is still possible to log in and send messages to all existing User ID mailboxes that begin with this digit. For example, if there are five digit User ID mailboxes that begin with this digit, then you should not set the value of this parameter less than five. Check all User ID mailboxes, including users, guests, and reserved (411, 990, etc.) Possible values: 1~8 Default: 8

SMDI Serial Integration

Stratagy can enable Simplified Message Desk Interface (SMDI) protocol to provide a RS-232 integration with telephone systems that also have SMDI capabilities. This integration is used with Centrex installations and is an option for the Strata DK14/40i/40 and Strata DK424.

SMDI is the most efficient way of integrating Stratagy with a telephone system. SMDI relies on data, not DTMF, to provide detailed call information that Stratagy can quickly use to direct callers to user's mailboxes. It provides calling party ID (to recognize users calling from their extensions) so that there is no need to enter their User ID, only their security code, to log on to their mailboxes.

Data messages or packets are sent into the system to provide information concerning the type of call that is ringing into Stratagy. Stratagy can use this status information to provide better call coverage and perform custom applications using the RNA and Busy Chain options.

There are four types of incoming packets:

- A – All Call Forwarded Calls
- N – No Answer Forwarded Calls
- B – Busy Forwarded Calls
- D – Direct Calls

Message Waiting is also enabled and disabled through this link.

An example of an SMDI packet is:

Packet: MD0010208B0000000205 0000000223	
MD001	Message Desk Number. This information is not utilized by Stratagy for call processing and is ignored.
0208	Terminal Number. This is the assigned number or extension number of the port that is ringing into Stratagy.
B	Call Status. Defines the type of call that is ringing into Stratagy as a Busy Forward call.
0000000205	Number of the Called Extension. Number length is 10 digits. Numbers that are shorter than 10 digits are padded with zeros.
0000000223	Number of the Calling Extension. Number length is 10 digits. Numbers that are shorter than 10 digits are padded with zeros.

Note The above values are examples and can be different for each installation.

Step 1: Enable SMDI

1. Select the appropriate Strata DK system with SMDI integration from the Toshiba Plug and Play screen. (See "Toshiba Plug and Play" on page 4-4 for instructions.)
2. Define parameters in Stratagy System Configuration for SMDI/Serial Integration (see Table 4-4).
3. Define the Serial Ports used for the link (see page 4-28). Strata DK settings are: 7, even, 1 stop.
4. Define Message Notification via SMDI in the Notify table of each mailbox. The **S( )** token is used to send the proper commands for enabling and disabling Message Waiting over the serial port of the Stratagy. A number of default templates can be found in the Template table that works with most SMDI applications. (See "Templates" on page 6-28.)

   Example titles of the SMDI templates are:

   COM1-3D LGHT On

   COM1-3D LGHT Off

   Where:
   COM1 defines the COM port used as 1, and 3D defines the digit length of the User ID as 3.

Note By selecting the template, the token programming sequence, starting with the **S( )** token, is placed automatically by Stratagy in the Notify Menu's *Method* field. To prevent Stratagy from physically taking a port off-hook, you must place an "@" sign before the **S( )** token in the field.

Table 4-4 SMDI Parameters

Parameter	Description
smdi_base_port	Some SMDI installations use logical terminal numbers that do not begin with 1 (for example, if it uses the extension or physical number to define the terminal). In these situations, you must define the extension number where port 1 is connected. The system assumes that the extension numbers are then connected in numerical order to the remaining ports. Example: 208 (extension number of port in Strata DK) Default: 1
smdi_port	Logical serial port Stratagy uses for SMDI integration. Possible values: 0 (disables SMDI integration), 1, 2 (port number) Default: 0
smdi_pretimeout	Maximum number of seconds that an SMDI packet can *precede* the forwarded call. Possible values: 5~50 (seconds) Default: 50
smdi_type	Protocol Stratagy uses with RS-232 data integration (outband integration). 'smdi': standard SMDI integration 's75': System 75 integration Possible values: 'smdi', 's75' The single quotes are required. Default: 'smdi'

Step 2: Connect SMDI

SMDI connections use a RS-232 cable to connect the telephone system to one of Stratagy's serial ports.

For a Centrex installation, a data modem provides the SMDI connection. SMDI interface requires that the Strata DK have a WSIU, TSIU, PIOU, PIOUS, RSSU or RSIU PCB installed.

Consult the *Strata DK Installation and Maintenance Manual* for installation instructions.

Step 3: Test SMDI

After the SMDI feature has been enabled in Stratagy and the serial link has been established with the COM ports, the SMDI link can be tested.

Initial testing can be done by making test calls into Stratagy. Program a User ID with default options. Use the default System Greeting and default System Busy greetings for the mailbox.

1. Make a call into Stratagy from an extension that is the same number as the User ID. Stratagy receives a Direct Call packet and prompts "Please enter your security code."

Note If the system plays the Company Greeting, then the link is not working. Recheck the installation.

2. Call forward a telephone All Calls. From another extension, call the forwarded telephone. The System Greeting for the mailbox plays.

Note If the system plays the Company Greeting, then the link is not working. Recheck the installation.

3. Call forward a telephone for Busy. Make the extension busy, then call the busy extension from another telephone. The System Busy Greeting plays.

Note If the system plays the Company Greeting, then the link is not working. Recheck the installation.

4. If Steps 1, 2 and 3 were successful, make another call from an internal extension (that has a User ID assigned on the system) to the forwarded extension, and leave a message.
5. Log on to the User ID that has the message. The header information for the message should include the User ID number of the extension that left the message.

   Play the message. If these tests are successful, the SMDI integration is working properly. If these tests fail, then the link must be monitored to validate whether the data is being sent from the host phone system or the data is not being processed correctly by Stratagy. Proceed to Step 4.

Step 4: (Optional) Validate the Link

If the tests in Step 3 on page 4-34 fail, then the link must be monitored to validate whether the data is being sent from the host phone system or the data is not being processed correctly by Stratagy. To validate the link, you must perform the following procedure.

Note For further assistance, contact Toshiba Technical Support.

1. Connect a portable or desktop PC to the RS-232 serial connection from the Host telephone system.

Note The PC must have a communications program such as Microsoft Windows Terminal or ProComm. The data packets are in ASCII format.

2. Make calls into the Stratagy voice ports. As calls ring in, data packets should be received on the PC. If packets are being sent, then Stratagy is not processing them correctly. Continue to Step 4.

Note If packets are not seen, the host phone system may not be sending the packets or there is a bad cable or connection.

3. Re-check configuration parameters in the Stratagy. Validate the data protocol parameters and COM port are properly defined in the Serial Port Definition of the Stratagy System Configuration.
4. Call each port individually and validate by the packet information that the Terminal number for the first port correlates with the value defined by *smdi_base_port* in the Stratagy System Configuration. Validate remaining Terminal numbers are sequential from the first.
5. Validate that the number of the Called Extension (defined in the packet) is a valid User ID. If the User ID is less than seven digits long then the number is prefixed with zeros in the packet. If the User ID is less than seven digits long but the Called Extension defined in the packet is prefixed by numbers other than zero that information must be defined in the System Integration Patterns screen (see page 4-9).

SMDI Calling Party Identification

The Strata CTX/Strata DK telephone system only provides the Stratagy with incoming Calling Party ID via SMDI integration. Data messages or packets are sent into the system to provide information concerning the type of call and the calling party ID.

Note When configuring the Stratagy for SMDI, make sure both the Stratagy and the telephone system are configured concurrently. If the phone system is configured for a 10-digit Calling Party ID, the IVP8 must also have the proper 10-digit integration patterns in the System Integration Patterns screen (see page 4-5). Also make sure the correct notification template has been selected in the User ID Notify screen.

See "SMDI Serial Integration" on page 4-32 for detailed information on SMDI, caller ID, and **%K** token use.

Some examples of the available applications are adding the Calling Party ID to the message header, playing a specific greeting and routing a call based on the telephone number received.

Calling Party ID in Message Header

One new application is playing the Calling Party ID in the header information of the message. To configure this option, in addition to making the required changes for SMDI integration in the Stratagy System Configuration, you must make sure the *play_caller_id* parameter is set to True.

Call Routing Based on Caller ID

The Stratagy can also play a specific greeting or route a call based on the telephone number received from the SMDI/Caller ID information.

Each port on the Stratagy system stores the **%K** token's value individually so multiple ports can run this application simultaneously. The value of the **%K** token lasts for the duration of the call and is cleared when the Stratagy voice port goes idle. When Stratagy transfers the call to a Strata DK LCD telephone, the Caller ID information displays on the LCD.

Example Application

In this example, mailbox 900 answers incoming calls to the Stratagy system. The Caller ID information is temporarily stored as the **%K** token. Using the **V** token, Stratagy searches the CALLERID.TXT file for the telephone number saved as **%K**. If there is a match for **%K**, the number in the second column of the file (890 in this example) is stored as the variable **%S2**.

The final portion of the token string in mailbox 900 sends the call to mailbox **%S2** to hear the correct greeting, route the call to a specific location (e.g., customer support), etc. If there is no match found for **%K**, the call follows the Done chain to mailbox 990 for normal call processing.

➤ **To configure this example for the Flash and IVP8**

Note Flash only supports the **V** token when used in conjunction with SMDI integration.

1. Using any text editor, create the DOS text file (CALLERID.TXT) on the Stratagy Admin PC. The format should be:

   9495833700,890

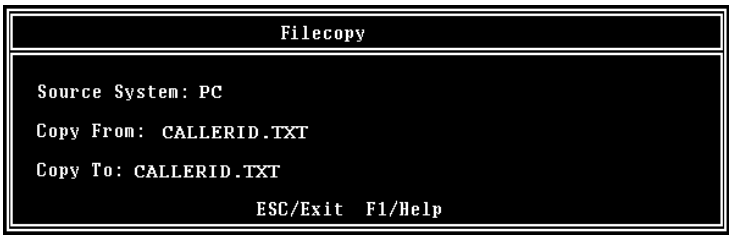
   9495876798,890

   where: 9495833700 and 9495876798 are the Caller ID phone numbers

   890 is the GOTO mailbox
2. Save this file as C:\CALLERID.TXT.
3. From the Stratagy Admin Main Menu, press **Alt+T** to access the Tools menu.
4. Press **8**. The Filecopy screen displays.
5. Enter PC in the *Source System* field, and CALLERID.TXT in the *Copy From* and *Copy To* fields.

3233

6. Press **Enter**. Stratagy copies the file to the Flash/ IVP8's C:\drive.
7. Press any key to continue.
8. Press **Esc**. Stratagy Admin's Main Menu displays.



3516

9. From the Main Menu, press **Alt+U** to access the Users Menu.
10. From the Users Menu, create and save User ID mailbox 900. Enter the **%K** token string in the *Extension* field. Set the mailbox's *Do Not Disturb* field to Off and configure the Done and RNA chains.

11. From the Users Menu, create and save the Caller ID greeting mailbox (890).

    Set the *Do Not Disturb* (DND) field to On for this mailbox unless another token string is being used to run a subsequent application.

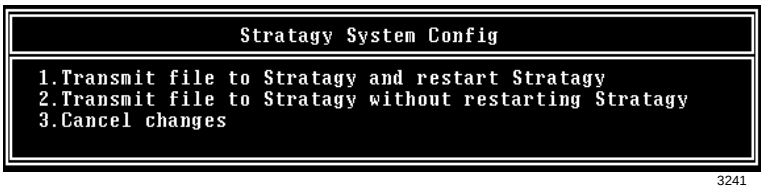
12. Press **Esc**. The Stratagy Admin Main Menu displays.
13. Press **Alt+T**. The Tools menu displays.
14. Press **6**. The Stratagy System Configuration screen displays.
15. Modify the *box_grt* parameter for the appropriate number of ports in the Per Port Definitions portion of the Stratagy System Configuration. The lines should look similar to this:

    The example mailbox 900 looks like this:

Mailbox	900	
Extension	**@KFV("CALLERID.TXT",1,%K,2,%S2) G(%S2)**	
@	Suppress normal process.	
KF	Suppresses DTMF gate.	
V("CALLERID.TXT",1,%K,2,%S2)	Searches field 1 of the callerid.txt for a value that matches **%K**. If a match is found, Stratagy stores the value in field 2 of the callerid.txt as %S2. If no match is found, the remaining values in the token string are ignored and Stratagy executes the Done chain (User ID 990).	
G(%S2)	Goes to mailbox number stored in %S2 (e.g., user ID 890).	
Done Chain	990	Ensures the call is still handled in case of an error in the process.
RNA Chain	990	
DND	Off	Stratagy processes token string.

    ```
    #- Per Port Definitions
    set box_grt 900 1
    set box_grt 900 2
    set box_grt 900 3
    set box_grt 900 4
    ```

16. Press **ESC**.
17. From the Stratagy System Config screen, press **1**. The changes are transmitted to Stratagy and Stratagy is shut down.



3241

    When the copy is complete, this status box displays:

3254

18. Press any key to reboot. Incoming calls are now routed to User ID mailbox 900 where Stratagy searches for a Caller ID match.

How Stratagy Operates 5

Stratagy connects to standard analog extensions on the telephone system. To the telephone system, Stratagy looks like several ordinary telephones, not special digital or “fancy” telephone sets.

The telephone system controls the incoming calls until it directs them to Stratagy by ringing its “telephone” or port. Once a call rings on a Stratagy port, Stratagy answers and then performs the actions it is programmed to perform.

Stratagy’s design revolves around User ID mailboxes. How a User ID has been customized determines what a caller hears and is able to do (see Chapter 4 – Configure Stratagy for details). For example, if User ID 990 contains the initial company greeting, a caller accessing User ID 990 hears the greeting recorded as the greeting for User ID 990.

Call processing control in Stratagy involves User IDs, chains, groups, menus, and a token programming language. Using these control structures, you can define virtually any call handling method.

This chapter discusses:

- User IDs
- Call processing control
- User ID mailboxes
- How Stratagy processes User IDs and User ID mailboxes

User IDs

All of Stratagy’s User IDs are stored in a flatfile database. As a result, every User ID in Stratagy must be unique; you cannot have two User IDs with the same number.

Whenever a caller enters a User ID, Stratagy always accesses the same User ID. The exception is single-digit menus. If you define a single-digit menu key (0~9), Stratagy processes the User ID given for the menu key rather than the User ID with the single digit number. For example, if a caller were in User ID 100 and User ID 100 had a single-digit key 0 mapped to User ID 222, then by pressing 0 the caller would be sent to User ID 222 rather than to the operator defined by User ID 0.

Reserved User IDs

Stratagy comes with several pre-defined User IDs. Only User ID 999 cannot be assigned to another User ID number. Each of the following User ID mailboxes performs a specific function.

Most of the mailbox numbers of the pre-defined User IDs can be changed, if required, to better meet your customers needs.

Notes

- User IDs 989, 993, 995, and 996 are not supported by the Flash.
- User ID 993 is supported only by the IVP8.

User ID 0: Operator – For an after hours caller who is unable to direct his own call or does not know the extension of the person he wants to reach. See Appendix B – Special Greeting User ID Mailboxes for details.

User ID 411: Directory – Directory User ID for all ports or specified ports. The caller enters the first few letters of the name of the person he/she wants to contact. Stratagy plays the corresponding User ID's name recording. See Appendix B – Special Greeting User ID Mailboxes for details. Also see the Stratagy System Configuration parameter *box_idx* in Chapter 4 – Configure Stratagy.

User ID 982/983: System Shutdown 1 & 2 – These User IDs enable the System Administrator to shut down the system via the telephone dial pad.

User ID 989: AMIS Loopback – User ID mailbox used by other AMIS nodes for testing the network. Any AMIS message directed to this User ID mailbox is sent back to the sender, if accessible to Stratagy. By default, the User ID mailbox is disabled. See the Stratagy system configuration parameter *amis_ltm* in Chapter 9 – AMIS Networking.

User ID 990: Company Greeting – The salutation that lets the caller know which company he called. See Appendix B – Special Greeting User ID Mailboxes for details.

User ID 991: Caller Instructions – Give the caller options for reaching departments or information. See Appendix B – Special Greeting User ID Mailboxes for details.

User ID 993: Soft Modem – The **KM** token is factory programmed into this User ID. The token enables a Stratagy Admin PC's modem to communicate with the IVP8 internal modem (2400 baud).

User ID 994: Fax Tone Detect – User ID Stratagy "jumps" to when Stratagy detects a specific tone. Used to handle incoming faxes, detect connections from TDD machines for deaf communication, etc. See the Stratagy System Configuration parameter *hot_box* in Chapter 3 – Configure Stratagy.

User ID 995: Future Delivery – Stores all messages awaiting future delivery. See the Stratagy System Configuration parameter *future_delivery* in Chapter 4 – Configure Stratagy.

User ID 996: Guest Defaults – User ID Stratagy uses for the default values when creating a new Guest User ID. The field values are copied into a new Guest User ID upon initialization. See the Stratagy System Configuration parameter *guest_defaults* in Chapter 4 – Configure Stratagy.

User ID 997: Defaults Box – User ID Stratagy uses for the default values when creating a new User ID. The field values are copied into a new User ID upon initialization. See the Stratagy System Configuration parameter *defaults_box* in Chapter 4 – Configure Stratagy.

User ID 998: Direct Message – Direct Message User ID for all ports or specified ports. Stratagy records a message for a User ID without having to execute the Extension field and/or hear the User ID's greeting. This is particularly useful for an Operator transferring directly to voice mail. See the Stratagy System Configuration parameter *box_send* in Chapter 4 – Configure Stratagy.

User ID 999: System Administrator User ID – Enables the System Administrator to create system lists, record and delete system announcements, record the busy-hold music or message, manage User IDs, and review system status. See *System Administrator Guide* for details. This mailbox has a pre-programmed extension of **H( )** for Hang-up. This enables (999) its use as a disconnect code for telephone systems that provide this feature.

Call Processing Control

Call processing control in Stratagy goes beyond the definition of unique User IDs. Stratagy provides four additional structures: chains, groups, menus, and a token programming language. These control structures enable more complex control so that you can define virtually any call handling method.

Chains

Chains are how you tell Stratagy what to do when one of three conditions apply:

- Done – The Done chain instructs Stratagy where to send a caller who remains on the line after leaving a message or after listening to an announcement only mailbox.
- Ring No Answer (RNA) – The RNA chain instructs Stratagy where to send a caller when there is a RNA at a User ID's extension.
- Busy – The Busy chain instructs Stratagy where to send a caller when a User ID's extension is Busy.

Groups

Groups control which User IDs a call may access. Each User ID mailbox user can be a member of up to four groups. To be able to access another User ID, the caller User ID must share at least one group number with the currently accessed User ID.

Menus

Menus define the destination for a caller that presses one of ten possible single-digit menu options while listening to a mailbox's greeting. Menus can accommodate an unlimited number of special applications.

Token Programming Language

Stratagy's programming language enables Stratagy to perform such versatile features as obtaining information from callers, message waiting light control, and confirming digits entered by a caller. A series of tokens instruct Stratagy what actions to perform. See Chapter 7 – Token Programming for details.

User ID Mailboxes

Types of Mailboxes

User IDs fall into one of several general categories, based on how they are customized.

User

A typical User ID mailbox records messages from callers. A user can periodically check the User ID for messages, or be notified by a variety of automatic notification methods. Typically, there is one user for each User ID, although several User IDs may share a single extension because the users themselves share a single telephone line.

Information

An information User ID mailbox does not accept messages from callers. Instead, Stratagy plays its greeting to callers in order to provide them with information, such as the company's hours of operation and location. No user or telephone extension corresponds to this type of User ID.

Control

Using Stratagy's Token Programming Language, a control User ID mailbox, directs the flow of a call. Typically, it interacts with the caller in some way, then transfers the call to one or more additional User IDs for further processing.

For example, a User ID might ask the caller to input his or her telephone number. If the telephone number is seven digits long, Stratagy assumes it is valid and the User ID passes control to a second User ID that makes use of that telephone number in some way (such as faxing a document to it). If the telephone number is not seven digits long, Stratagy might transfer to a third User ID, which would be an information box whose recording informs the caller that the telephone number was not the right length. The User ID might then transfer control back to the original User ID to give the caller another chance to enter the correct number of digits.

Customizing Mailboxes

Customizing User ID mailboxes involves defining User IDs using the following menus:

- **Users Menu**—The Users Menu consists of three screens (Info/Status, Options, Group/Chains) that enable you to define, delete, and list User ID mailboxes. Features to define include: company directory entries, Do Not Disturb, Call Screening, Greetings, and control structures such as Chains, Groups, and Menus. Once you have defined and saved a User ID, you can customize it using the Auto and Notify Menus. (See Chapter 6 – Menus for detailed information.)
- **Auto (Scheduling) Menu**—With the Auto Menu, you can set up automatic changes for each User ID Mailbox. You can set these changes to occur at a specified time, on certain days of the week, or on a specified date. For example, you can set up different daytime and nighttime greetings. (See "Auto (Scheduling) Menu" on page 6-20 for detailed information.)
- **Notify Menu**—The Notify Menu enables you to program Stratagy to automatically call a user to notify him of messages. Notification methods include beepers, other telephones, and office paging systems. (See "Notify Menu" on page 6-27 for detailed information.)

In addition to the programming capabilities provided by the Users, Auto, and Notify Menus, Stratagy provides:

- **Token Programming Language**—Enables you to obtain additional features. These include obtaining information from callers and message waiting light control. See Chapter 7 – Token Programming for details.

- **Reserved User ID Mailboxes**—These mailboxes have pre-programmed common features. See "Reserved User IDs" on page 5-2 for more information.
- **Notify Templates**—Notify contains templates (e.g., message waiting light control and pagers) you can use for defining User ID Notify records.

See Appendix A – Checklists/Forms for forms to use for defining the Users, Auto, and Notify Menus. See Chapter 8 – Customization Examples for sample customized User ID mailboxes. If you have questions about customizing User ID mailboxes, please contact Toshiba Technical Support.

How Stratagy Processes

User IDs

Whenever a call rings a port on Stratagy, Stratagy answers and begins processing the call starting at a predefined User ID. After processing the initial User ID, Stratagy continues processing by following a chain to the next User ID. At any time, should a caller enter DTMF, Stratagy translates the DTMF to a User ID and continues processing at that User ID. Therefore, movement between User IDs is accomplished automatically by following chains or by DTMF entry. (And a third way: Stratagy's Token Programming Language.)

How Stratagy Processes Movement Between User IDs

The process described is the default setup in Stratagy (see Figure 5-1). For example, User ID 990 (Company Greeting) and User ID 991 (Caller Instructions) are defaults; you can assign other User ID mailboxes to perform these functions. In addition, you may override any of the described processing by changing the chain and User ID definitions.

1. **New Call** – The process starts with an incoming call. Stratagy directs the call to the Company Greeting User ID.
2. **Company Greeting User ID** (Default: User ID 990) – The Company Greeting User ID plays the opening greeting ("Thank you for calling... "). Stratagy determines whether the caller entered DTMF during the greeting.
   - **Yes** – Stratagy directs the call to that DTMF and processes the User ID. It then follows the *Done* chain of the User ID. If there is no *Done* chain for this User ID, it follows the *Done* chain for the Company Greeting User ID.
   - **No** – Stratagy directs the call as per the Company Greeting User ID 990's *Done* chain to the Company Instructions User ID.
3. **Caller Instructions User ID** (Default: User ID 991) – The Company Instructions User ID plays the caller instruction message, which is a menu of dialing choices ("To reach... enter..."). Stratagy determines whether the caller entered DTMF during the message.
   - **Yes** – Stratagy directs the call to that DTMF and processes the User ID. It then follows the *Done* chain of the User ID. If there is no *Done* chain for this User ID, it follows the *Done* chain for the Company Greeting User ID.
   - **No** – Stratagy looks at the value of the Stratagy System Configuration parameter *dtmf_gate*.
4. **dtmf_gate** — Stratagy determines if the Stratagy System Configuration parameter *dtmf_gate* is True. See Chapter 4 – Configure Stratagy for information on configuring *dtmf_gate*.
   - **Yes** – Stratagy prompts the caller to say "yes" to the tone. If Stratagy detects any sound, Stratagy transfers the call to the Operator User ID. If not, Stratagy hangs up.
   - **No** – Stratagy transfers the call to the Operator User ID.

5. **Operator User ID** (Default User ID 0) – This is the end of the Company Instructions User ID's *Done* chain.

   If a caller presses **0** after recording a message for a User ID, the message is sent to the destination mailbox, the prompt, "message sent" plays and the call transfers to the Operator.

Note This feature is only available during the original message recording. If the caller presses **0** while re-recording or during the Message menu prompts, the Stratagy system reacts as if the caller has pressed **#**.

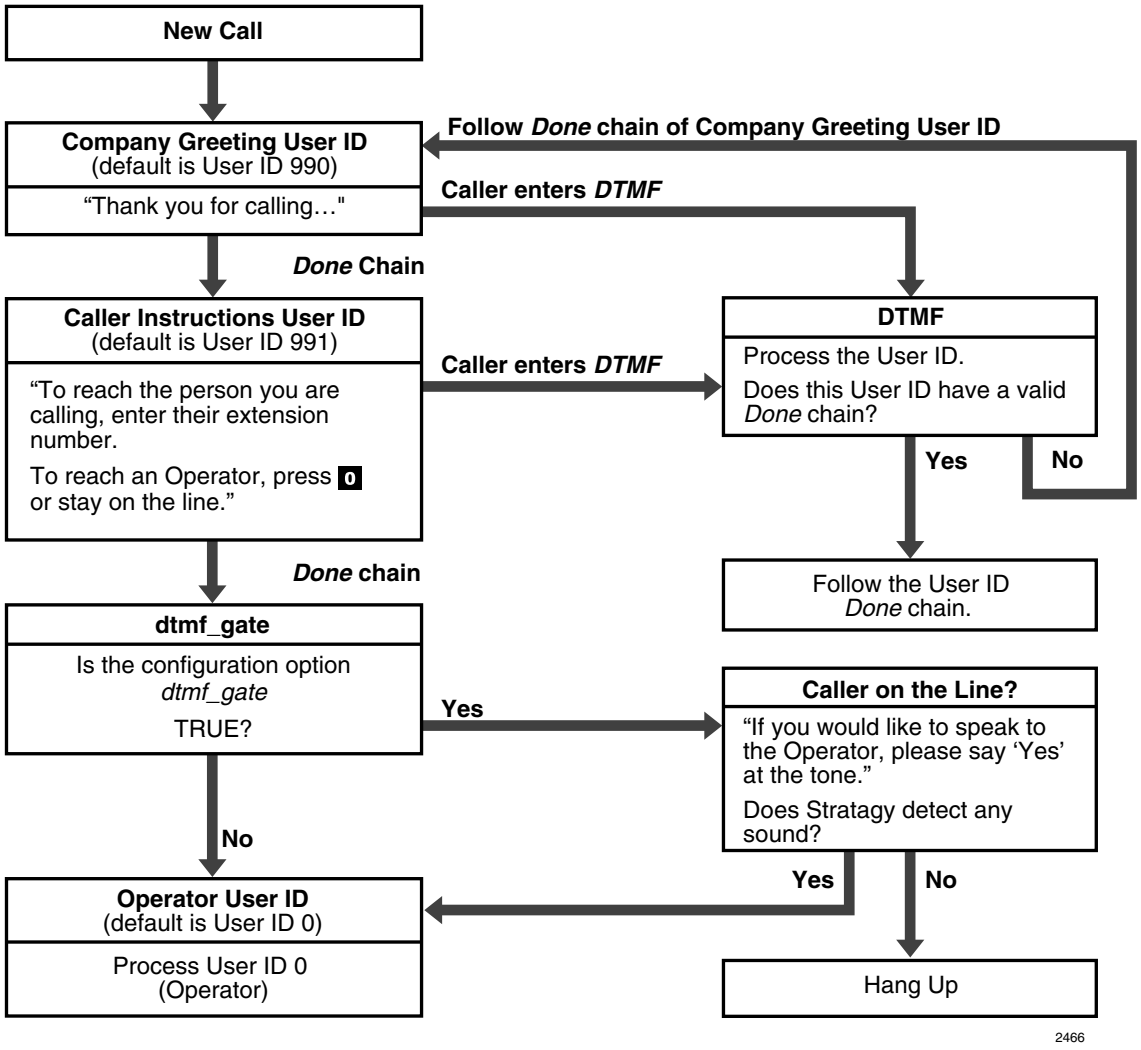


Figure 5-1 Movement Between User IDs

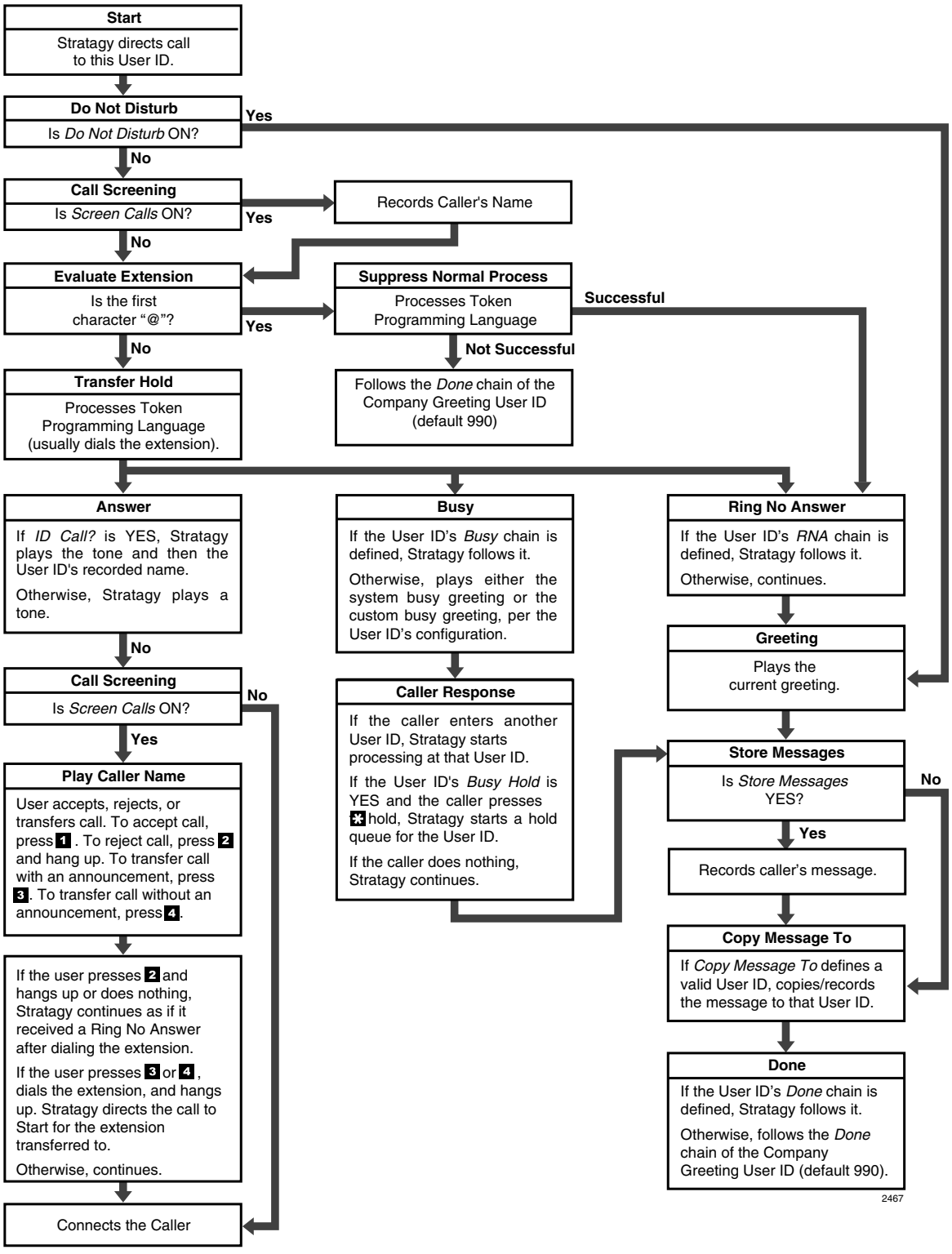


Figure 5-2 User ID Mailbox Processing

User ID Mailboxes

Stratagy processes a User ID mailbox (see Figure 5-2) based on:

- User ID mailbox field settings
- Whether an Answer, Busy, or RNA condition exists.

How Stratagy Processes User ID Mailboxes

1. **Start** – Stratagy directs the call to this User ID.
2. **Do Not Disturb** – Stratagy determines whether the User ID mailbox field *Do Not Disturb* is On.
   - **Yes** – Stratagy directs the call to the RNA greeting and proceeds with the RNA condition.
   - **No** – Stratagy determines whether *Call Screening* is On.
3. **Call Screening** – Stratagy determines if *Screen Calls* is On.
   - **Yes** – Stratagy records the caller's name and then proceeds to dial the *Extension*.
   - **No** – Stratagy dials the *Extension*.
4. **Evaluate Extension** – Stratagy determines if the *Extension*'s first character is @.
   - **Yes** – Stratagy suppresses the normal process. Stratagy processes the Token Programming Language, then proceeds to the RNA condition. If there is an error during processing, Stratagy follows the *Done* chain of the Company Greeting User ID.
   - **No** – Stratagy places the call on transfer hold, dials the digits in the User ID's extension field, then proceeds to the Answer, Busy, or RNA condition, as appropriate (see Table 5-1).

Table 5-1 Call Flow

Answer	Busy	Ring No Answer
Stratagy determines if *ID Call* is Yes. Yes – Stratagy plays the user's recorded name. If the recording does not exist, Stratagy plays a tone. Stratagy proceeds to *Call Screening*. No – Stratagy proceeds to *Call Screening*.	Stratagy determines if the *Busy* chain is defined. Yes – Stratagy follows this User ID's *Busy* chain. No – Stratagy proceeds to play the busy greeting.	Stratagy determines if the *Ring No Answer* chain is defined. Yes – Stratagy follows the User ID's *Ring No Answer* chain. No – Stratagy plays the current greeting.
Call Screening – Stratagy determines if *Screen Calls* is On. Yes – Stratagy plays the name the caller recorded. No – Stratagy connects the caller.	**Play Busy Greeting** – Stratagy determines if there is a custom busy greeting. Yes – Stratagy plays the user's custom busy greeting. No – Stratagy plays the system busy greeting.	**Play the Current Greeting** – Stratagy determines if there is a custom greeting. Yes – Stratagy plays the user's custom greeting. No – Stratagy plays the system greeting.

Table 5-1 Call Flow *(continued)*

Answer	Busy	Ring No Answer
Play Caller Name – User Accepts, Rejects, or Transfers. Stratagy plays "To accept... " Accepts Call – User accepts call (presses **1**). Stratagy proceeds to connect the caller. Rejects Call – User rejects call (presses **2**) and hangs up. Stratagy proceeds to the Ring No Answer condition. Transfers Call with Announcement – User transfers call with announcement (presses **3**). The user dials the extension to transfer the call and hangs up. Stratagy plays "Your call is being transferred to" with the name recording or User ID of the extension where the call is being transferred and Stratagy transfers the call. Stratagy proceeds to Start for the extension transferred to. Transfers Call without Announcement – User transfers the call without announcement (presses **4**). The user dials the extension to transfer the call and hangs up. Stratagy asks the caller to continue to hold and transfers the call. Stratagy proceeds to Start for the extension transferred to.	**Caller Response** – Stratagy directs the call depending upon the caller's response. Hold – If the User ID's *Busy Hold* is YES and the caller presses * to hold, Stratagy starts a hold queue for this User ID. Another User ID – If the caller enters another User ID, Stratagy processes that User ID. Nothing – If the caller does nothing, Stratagy determines if *Store Messages* is YES.	**Store Messages** – Stratagy determines if *Store Messages* is Yes. Yes – Stratagy records the caller's message. Then determines if there is a *Copy Message To* mailbox. No – Stratagy determines if there is a *Copy Message To* mailbox.
	Store Messages – Stratagy determines if *Store Messages* is Yes. Yes – Stratagy records the caller's message. Then determines if there is a *Copy Message To*. No – Stratagy determines if there is a *Copy Message To*.	**Copy Message To** – Stratagy determines if *Copy Message To* contains a valid User ID. Yes – Stratagy copies/records that message to that User ID. Stratagy then proceeds to the User ID *Done* chain. No – Stratagy proceeds to the User ID *Done* chain.
	Copy Message To – Stratagy determines if *Copy Message To* contains a valid User ID. Yes – Stratagy copies/records that message to that User ID. Stratagy then proceeds to the User ID *Done* chain. No – Stratagy proceeds to the User ID *Done* chain.	**User ID Done Chain** – Stratagy determines if this User ID *Done* chain is defined. Yes – Stratagy follows the User ID *Done* chain. No – Stratagy follows the *Done* chain of the Caller Instructions User ID.
Connect the Caller – If the user accepts the call, Stratagy connects the caller and the user.	**User ID Done Chain** – Stratagy determines if the User ID *Done* chain is defined. Yes – Stratagy follows the User ID Done chain. No – Stratagy follows the *Done* chain of the Caller Instructions User ID.	**Caller Instructions User ID Done Chain** – Stratagy follows the Done chain of the Company Greeting User ID (default 990).
	Caller Instructions User ID Done Chain – Stratagy follows the *Done* chain of the Caller Instructions User ID (default 991).	

Feature Programming

This chapter lists (in alphabetical order) Stratagy's programmable features and gives instructions on programming each feature. All features are categorized as:

- System – Features set on a system-wide basis.
- User ID Mailbox – Features set on a User ID mailbox basis.

For descriptions of these features, see the *Stratagy General Description*. For additional information, see:

- Parameters – Chapter 4 – Configure Stratagy
- Tokens – Chapter 7 – Token Programming
- Menus – Chapter 6 – Menus

Note Copies of the menus are available in Appendix A – Checklists/Forms. We recommend that you fill in the appropriate forms and give copies to the System Administrator for their reference.

Automatic Scheduler

Mailbox Feature

Set this feature using the Auto (Scheduling) Menu. You can program the following features to occur automatically at a preset time, day, or date:

- Audiotex
- Call Screening (toggle On or Off)
- Company Greeting (toggle On or Off)
- Personal Greetings (change the Personal Greeting that plays by time of day)
- DND (toggle On or Off)
- Scheduled Extensions (change where a call is transferred to when a caller dials the User ID from the Stratagy automated attendant)
- Message Notification
- Ring Duration (number of rings when a call is transferred to an extension by the Stratagy automated attendant before it is considered Ring No Answer (RNA).

Automatic System Recovery

System-wide Feature

This feature defaults to enabled (True). To disable this feature, reset the *restore_original* and *restore_config* parameters to False.

To receive notification of an unsuccessful startup, use the *error_box* parameter to designate a User ID Mailbox to receive the message. The Notify menu for the mailbox should be set for a PANIC notification type.

Busy Station Identification for IVP8

System-wide Feature

To use this feature you must configure the *console_slot_id* and *dss_active* parameters, program the *DSS Port* field (see Chapter 4 – Configure Stratagy and Chapter 6 – Menus), and install/program a PDKU as the DSS console (see "Busy Station Identification" on page 1-10).

➤ **To configure the feature in Stratagy**

1. Set the *dss_active* parameter to TRUE.
2. Configure the *DSS Port* field on the User Menu – Options screen for each mailbox.

Important! *Once the DSS/Busy Lamp feature has been programmed using the two parameters and the DSS Port field, IVP8 must be restarted two times. The first restart configures the DSS parameters/field. The second restart "loads" the DSS parameters/field into active memory.*

Called Identification

Mailbox Feature

This feature defaults to disabled (No). To enable it, set the *ID Call?* field (Users Menu Options Screen) to Yes.

SMDI Caller ID

To configure this feature, use the *play_caller_id* parameter and the **%K** token. See "SMDI Calling Party Identification" on page 4-35 for details.

Caller Confirmation Prior to Transferring

System-wide Feature

This feature defaults to enabled (True). To disable this feature, reset the *dtmf_gate* parameter to False.

When enabled, the system states, "Say yes at the tone." A verbal response completes the transfer to a company operator and "no response" causes the system to disconnect the call.

Call Screening

Mailbox Feature

This feature defaults to disabled (Off).

To enable it, set the *Screen Calls* field (Users Menu Options Screen) to On. This enables the user to turn this feature On or Off from the phone's dial pad. If you set the *Screen Calls Lock* field to On, the user is prevented from changing the Call Screening feature in this manner, and only the Administrator can change it.

This feature can also be set to switch automatically to Call Screening mode and back again at a certain time/day/date, using the Auto (Scheduling) Menu.

Call Transfer

Mailbox Feature

All Stratagy call transfers are controlled by the *User ID* and *Extension* fields (Users Menu Options screen). Entering only the destination extension results in a supervised call transfer. Other call transfer types are implemented with Tokens.

Note XXXH = blind transfer to extension XXX.
XXXU = release the call to extension XXX if ring tone is detected.

Chaining

Mailbox Feature

Stratagy's chaining feature enables the flow of control during call processing to be directed from one User ID to another, based on the results of dialing the *Extension* field (Users Menu Groups/ Chains screen).

Note The User ID can not be configured in Do Not Disturb mode.

The three possible chaining conditions are Done, RNA and Busy.

Directory

Mailbox Feature

Set the *box_idx* parameter for the User ID Mailbox that searches the directory for user names (default is 411). You can also designate a different mailbox for different ports.

Disk Space Notification

System-wide Feature

This feature defaults to 5% free disk space. To reset the feature, use the *diskwarn* parameter (values = 1~99). The value (percentage) becomes the threshold or percentage of available disk space that remains on the flash drive.

To receive notification when the threshold has been reached, set User ID 999's *Type* field (Notify Menu) to DISK. Time intervals between notification, alternate notification destinations, etc., can also be programmed using the Auto (Scheduling) Menu.

Distribution Lists

Mailbox Feature

Set the *cmt_maxlen* parameter for the time allowed for recording a list comment (defaults to 10).

Do Not Disturb

Mailbox FeatureThis feature defaults to disabled (Off).

To activate this feature, set the *Do Not Disturb* field (Users Menu Options Screen) to On. This enables the user to turn this feature On or Off from the phone's dial pad. If you set the *Do Not Disturb Lock* field to On, the user is prevented from changing the DND feature in this manner, and only the Administrator can change it.

This feature can also be set to switch automatically to DND mode and back again at a certain time/day/date, using the Auto (Scheduling) Menu.

Extensions—Scheduled

Mailbox Feature

Set the scheduled extensions in the Auto (Scheduling) Menu.

Fax Tone Detection

System-wide Feature

This feature sends fax tone detection to User ID 994 (default). To change the User ID, set the *hot_box* parameter for the new destination extension of the fax machine. The designated User ID accepts the fax tone and a blind transfer to the extension connected to the fax machine follows.

Future Delivery

System-wide Feature

Dedicate a User ID (default User ID 995) mailbox for storing all future delivery messages using the *future_delivery* parameter. The messages stored in the mailbox cannot be deleted or played by the Administrator.

Note Not supported by the Flash.

Greeting

Mailbox Feature

Busy Greeting

This feature defaults to the System Busy Greeting (SYS). To change it to a custom busy greeting, set the *Busy Greeting* field (Users Menu Options Screen) to CUS.

The amount of time allowed for recording the greeting is 45 secs (30 secs for the Flash). To increase or decrease the time, set the *Busy Greeting Max*. field (Users Menu Options Screen) to 1~999. Setting this field to 0 prevents the user from recording or changing a custom Busy Greeting.

Personal Greeting

By setting the *Current Greeting Max* field (Users Menu Options screen) to zero, the Administrator can prevent the user from recording a new greeting or changing (recording over) an existing greeting. This has the effect of locking the greeting recording(s), and prevents the user from changing the current greeting number. If the user's greetings are not locked, the user can change the greeting number and/or record new greetings (up to the permitted length).

Greeting—Company

System-wide Feature

You must record all company greetings using the "Information User IDs," such as the initial greeting User ID (typically "990"). A company, for instance, can have a standard greeting play during regular business hours, and a second greeting play after hours which informs callers that the business is closed, etc.

A third greeting can also be recorded which explains that "the company is closed for the holiday." Since the Auto Scheduler permits holidays to be programmed up to a year in advance, and repeats automatically at one year intervals, the holiday greeting can play automatically on each holiday.

Greeting—Port-Selectable

System-wide Feature

This feature defaults to User ID Mailbox 990 for all ports. This feature should be configured to start processing with the appropriate User ID based on the expected use of the Stratagy ports. If you need to change the default, use the *box_grt* parameter.

After verifying the *box_grt* parameter setting is correct, the User IDs must be created and configured, and their greetings recorded to give callers the desired information.

Greeting Restart

Mailbox Feature

After a caller has left a voice message for a User ID, the call can either be transferred back to the initial "company" greeting User ID or the system can say "Thank you for calling, good-bye" and disconnect. By default a caller is returned to the "instruction greeting" (User ID 991). This can be chained via the Done chain in the user's mailbox.

Group Partitions—Call Blocking

Mailbox Feature

Define the group(s) that a User ID belongs to by filling in the group number(s) on the Users Menu Groups/Chains screen. User IDs can only access other User IDs that are defined as being in the same group.

Guest Users

Mailbox Feature

This feature defaults to disabled (-1). To enable it, enter 0~99 (number of guest User IDs the user can create) in the *Guests* field (User Menu Options screen).

Note Flash does not support this feature.

The Administrator also controls the configuration of each created Guest User ID through the use of the *guest_defaults* parameter. The parameter is set to a standard system template, User ID 996, but a new template can be created and used in its place.

Guest Users Limit

This feature is set in two ways:

- System Limit: The Guest Users Limit for the entire system is set by entering values in the *guest_min* (default 90000) and *guest_max* (default 90199) parameters. The difference of the entries is the maximum number of guest user IDs that can be created by all users on the system.
- User ID Limit: A limit is set (default: -1) for each User ID by entering a value in the *Guests* field on the User's Options screen. Valid entries are:
  - 0~99 enables the user to create that number of guest user IDs.
  - -1 stops the User from using the Guest Users feature.

The Administrator can also change the number remaining in the field to 0 at any time. The user has access to the previously-created Guest User IDs but cannot create new ones.

If the Administrator changes the number remaining in the field to -1 after Guest User IDs have been created, the Guest User IDs are not deleted but the user does not have access to them. Any new IDs cannot be created.

Interactive Voice Response (IVR)

System-wide Feature

All of the IVR features are implemented using Stratagy's flexible token programming language. This means that a combination of User IDs can be used to implement a sophisticated IVR application.

Enter the selected programming tokens in the *Extension* field (Users Menu Options screen) of the appropriate User ID. The size and sophistication of the customer application determines the number of User IDs and the tokens required. (See Chapter 8 – Customization Examples for examples on using tokens for IVR applications.) Stratagy can contain up to 100 million User IDs, many of which can be used simultaneously in this type of application.

Note The Flash does not support some IVR related prompts (e.g., monies).

Message Continuous Delete/Playback

System-wide Feature

This feature defaults to 30 minutes for continuous delete or playback. To change the setting use the *tape_length* parameter (values are 10~99 minutes).

Note The time period set is normally the length of a continuous recording.

Message Copy

Mailbox Feature

To enable this feature enter a User ID mailbox number in the *Copy Message To* field (Users Menu Options screen).

Set the *Store Messages* field (Users Menu Options screen) to Yes. Stratagy stores the message in both the accessed User ID mailbox and the User ID mailbox shown in the *Copy Message To* field. Any messages already stored in the originating User ID are not copied.

Message Copy with Delete

Mailbox Feature

To enable this feature enter a User ID mailbox number in the *Copy Messages To* field (Users Menu Options screen). Set the *Store Messages* field to No. Stratagy stores the message only in the *Copy Message To* User ID Mailbox. The first User ID does not store messages.

Message Date and Time Control

Mailbox Feature

This feature defaults to enabled (Yes) and the date/time is played automatically before the message. To disable this feature, change the *Play Date/Time?* field (Users Menu Options screen) to No.

Message Length Control

Mailbox Feature

This feature defaults to 180 seconds (30 secs. in the Flash). To change the feature, reset the *Store Messages* (*Max*) field (User Menu Options screen) to a value from 1~999 (seconds). If set to 0, messages can have any length up to Stratagy's disk capacity.

Message Notification

Mailbox Feature

Activate the Notify Menu. Notification records can become templates and used repeatedly (e.g., pager notification, turning on/off a message waiting light, etc.). Since the *Method* field (Notify Menu) can consist of a number of different programming tokens, an almost unlimited range of actions is available.

You can dedicate (reserve) a port(s) for outbound notifications, using the *n_ochan* parameter. If no port is dedicated for notification use, Stratagy attempts to use the highest numbered IDLE port.

Message Pause During Playback/Recording

System-wide Feature

This feature is set to a default pause of 30 seconds. To change the setting, use the *tmo_resume* parameter (system values are 0~255).

Message Playback Control

System-wide Feature

This feature is set to a default of five seconds. To change the setting, use the *play_skip* parameter (possible values are 1~99 seconds).

Message Purging

System-wide Feature

This feature defaults to disabled. To enable it, use the *purge* parameter (possible values: 1~99 days).

Message Retrieval Control

Mailbox Feature

This feature defaults to First-in, First-out order. To reset this feature, use the *Message Order* field (User Menu Options screen).

Message Speed Control

Mailbox Feature

This feature defaults to 0 (normal). If not reset, the system lacks an alternate rate speed and only plays at one speed. To reset the feature use the *Alternate Rate* field (Users Menu Options screen) to increase the alternate playback speed to 1~4. The user can toggle between the normal speed and the faster (alternate) speed by pressing **##**.

Note This feature is not supported by IVP8.

Message Volume Control

Mailbox Feature

This feature is set to normal/average sound (defaults to 0). To reset the feature, enter -8 (softest) to 8 (loudest) in the *Message Volume* field (Users Menu Options screen).

Changing the *gain_norm* parameter setting also affects this feature.

Messages—New, Pending and Saved

Mailbox Feature

Set *Saved Msg Que* field (Users Menu Options Screen) to Yes to create two queues, new and saved, or No for one queue for all messages.

Pending Messages

Any message listened to for a shorter amount of time than that specified in the *msg_pending_threshold* parameter is kept as a new message. The message remains in the New Message Queue and the Message Waiting Off notification type is not processed. A message that is listened to longer than the time specified but is not listened to all the way through or manually saved (by pressing **2**) or deleted (by pressing **3**) is considered a Pending Message. The message remains in the New Message Queue and the Message Waiting Off notification type *is* processed.

This feature defaults to disabled. To enable it set the *Message Pending* (Users Menu Options screen) field to On. To reset the threshold time, use the *msg_pending_threshold* (default 5 seconds) parameter (values are 3~10 seconds).

Messages—Urgent

Mailbox Feature

Set the *Type* field (Notify Menu) to URGENT to notify the user of urgent messages.

Multiple System Languages

System-wide Feature

This feature defaults to English prompts. To change the setting, you must:

- Load the desired additional prompt file(s) during system installation and configuration.
- Configure the system for the new language using the *prompt_file* parameter.
- Record a prompt to instruct callers on the steps for changing the file during a call.

Name (and Extension) Control

Mailbox Feature

This feature defaults to enabled (Yes). To disable this feature, set the *Record Name?* field (Users Menu Options screen) to No.

The amount of recording time defaults to 5 seconds. To change the amount of recording time reset the *nam_maxlen* parameter to 1~99 seconds.

Networking (AMIS)

System-wide Feature

An AMIS Analog protocol must be implemented on the other voice messaging system for AMIS networking to function. If the networking feature is being used to network Stratagy with another vendor's systems, planning and coordination between the two locations' Administrators is required to create a workable numbering plan.

The feature defaults to disabled. To enable the feature, remove the comment sign (**#**) and set the *amis_enabled* to True. See "amis_enabled" on page 9-4 for more instructions on setting the AMIS parameters.

Note Not supported on the Flash.

Paging – Office

Mailbox Feature

This feature is set using the *Type* field (Notify Menu) to RELAY. See Chapter 8 – Customization Examples for examples on setting up a notification to a pager.

Programmable Dial Actions

Mailbox Feature

Enter the token programming sequence into the *Extension* field (Users Menu Options screen). The default is usually the same as the User ID number, since users' ID numbers are often the same as their telephone extension number.

Reports

System-wide Feature

See Chapter 10 – System Reports for procedures on using the Report feature. To schedule an automatic report, use the *auto_report* and *auto_report_time* parameters. Reports can be scheduled in advance (24-hour format).

Ring Duration

Mailbox Feature

This feature defaults to four maximum rings per call. To reset this feature use the *Maximum Rings* field (Users Menu Options screen). Valid entries are 1~9 and 0 (sets the ring duration to system default).

This value can also be changed automatically at a certain time/day/date using the Auto (Scheduling) Menu.

Screen Advertisement

System-wide Feature

This feature is enabled (defaults to five minutes). To change the setting, use the *tmo_blank* parameter (valid entries are 1~99 min.) or to disable the feature set the parameter to 0.

Note The screen saver activates only when the Main Menu is displayed.

To program an advertisement or slogan (58-characters long) that displays instead of the blank screen use the *advertising* parameter.

Shared Extensions

Mailbox Feature

Each User ID is set to have the same shared Extension number, and the *ID Call?* field must be set to Yes.

Shutdown using the Telephone Dial Pad

System-wide Feature

Change Security Code for User ID 983 and set DND to Off.

Single-digit Menus

Mailbox Feature

Define the single-digit menu numbers (up to 10) for each User ID on the Group/Chains screen of the Users Menu. Leaving a given number's field blank indicates the digit has no special significance while this User ID is processed. A greeting must be recorded that the caller hears. An example is: "I'm not available to answer your call. Press 1 to leave a message, 2 to talk to my personal assistant, 3 to page me, 4 to send me a fax or 0 to talk to the operator."

The token programming language provides a special token **M** for prompting and processing menu choices.

Note Single-digit menu 0 is normally reserved for the operator.

System Administrator's Mailbox

System-wide Feature

See *System Administrator Guide* for information.

Token Programming

System-wide Feature

A token or group of tokens placed together to perform a specific function is referred to as a token string. A token string that performs call processing applications (offsite call transfer via Centrex lines, Fax Back, Fax on Demand, Holiday Application, etc.) are placed in the *Extension* field of a User ID. Tokens can also be used in the *Method* field (Notify Menu) to customize notification templates.

See Chapter 7 – Token Programming for a list of tokens and descriptions and Chapter 8 – Customization Examples for example token applications.

Universal Ports

System-wide Feature

The number of ports reserved for outbound notification is set in the *n_ochan* parameter (default = 0). When Stratagy is configured for 24 ports, at least 1 channel must be reserved for outbound notification.

You can also restrict Notify to only a defined port in the *notify_restriction* parameter (defaults to 1).

User ID Security Code

Mailbox Feature

Specify the initial security code in the *Security Code* field (Users Menu Options screen). Minimum and maximum length restrictions can be set using the *security_min_length* (default = 1, values 1~8) and *security_max_length* parameters (default = 16, valid entries are 1~16).

Using the System Administrator's User ID mailbox 999, the Administrator can reset the code for a User ID at any time. Although the Administrator can reset the code, he/she does not have access to existing User ID security codes.

The default security code for User ID mailboxes is: User ID + Security Code for Defaults Box 997. Since the Defaults Box's security code defaults to 997, any User ID created would have a default security code of User ID + 997. For example, User ID 234's default security code would be 234997.

If you change the Defaults Box's security code (for example to 555), all *new* mailboxes created have the new default security code (234555).

User ID—Variable/Fixed Length

System-wide Feature

To set the length of User IDs, use the *fixed_len0~9* parameters. System defaults to 8 digits.

Varied Sampling Rates

System-wide Feature

Use the following parameters to reset the sampling rates:

- *adpcm_hq* parameter for greetings and name recordings
- *adpcm_nq* parameter for incoming messages
- *adpcm_pq* parameter for system prompt file

Note Once the rates have been set, they cannot be changed since greetings or messages previously recorded are lost.

Voice Forms

Mailbox Feature

Program the **Q** (Question and Answer) token into the User ID. Each question is recorded as a greeting, either in that User ID or in others. The **Q** token specifies which greetings play and in what order. Up to 20 questions are allowed.

Menus 6

This chapter covers the screens used to configure the individual User ID mailboxes in the Stratagy system. See Figure 3-1 on page 3-5 for a diagram of the Stratagy menu system.

Users Menu

The Users Menu screens is where User IDs are created, modified, saved, and deleted. Features available through the Users Menu include:

- Company directory entries
- Basic options (RNA, DND, call screening, message storage, message playback, etc.)
- AMIS options
- User information and statistics
- Control structures (chains, groups, and menus)

Once you have defined and saved a User ID, you can further customize it using the Auto and Notify Menus. See "Auto (Scheduling) Menu" on page 6-20 and "Notify Menu" on page 6-27.

This chapter discusses:

- Access and exit the menu
- Menu options
- Create, modify, copy or delete a mailbox
- Boxlist
- AmisNodeList
- Users Menu field descriptions

Access and Exit the Users Menu

See Chapter 3 – Access and Use Stratagy for information about the Main Menu.

Access Users Menu

1. From the Main Menu, press **Alt**+**U**. Stratagy prompts you for your password.
2. Enter the password (the default password is Stratagy, with the first letter uppercase) and press **Enter**. The password does not display as you type. If you enter it incorrectly, you must select the Users Menu again. The Options screen displays, from which you can access the other Users Menu screens (Info/Status and Group/Chains).

Access a Screen

➤ Press **Alt**+**O**. The Options Screen displays.

...or **Alt**+**G**. The Group/Chains Screen displays.

...or **Alt**+**I**.The Info/Status Screen displays.

Exit Users Menu

1. Press **Alt**+**S**. Your changes are saved.

Important! *To save your modifications to the current User ID mailbox, you must press* **Alt+S** *before pressing* **Esc**.

2. Press **Esc**. The Main Menu displays.

Users Menu Options

The Users Menu (see Figure 6-1 and Table 6-1 on page 6-5) consists of three screens:

- Options (see Figure 6-2 and Table 6-2 on page 6-8) – Basic (RNA, DND, Call Screening and message information) and AMIS options for the User ID mailbox.
- Group/Chains (see Figure 6-3 and Table 6-3 on page 6-14) – Chain, group and menu information for the User ID mailbox.
- Info/Status (see Figure 6-4 and Table 6-4 on page 6-18) – Displays statistics for the User ID mailbox that can be used to generate reports.

Create User ID Mailbox

Note When you create a User ID mailbox, Stratagy uses the Defaults Box User ID (default 997) as a template for the new User ID mailbox.

1. From the Users Menu, Options screen, type a unique number in the User ID field and press **Enter**. Stratagy initializes the remaining fields with the values specified in the Defaults Box User ID.
2. To change any field settings, place the solid color edit block that appears on the screen next to the field name. Type the information in the field and press **Enter**

   ...or for some fields, press the spacebar to toggle the value.

Notes

- Use **Enter** or the arrow keys (↑↓) to move between fields.
- To display detailed help for the current field, press **F1**. See "Online Help Function" on page 3-6.

3. When finished, press **Alt**+**S**.
4. If necessary access the Groups/Chains screen and make any required changes to the field settings. The Groups/Chains screen displays.
5. When finished, press **Alt**+**S**. The User ID mailbox is saved and the *Box Created* and *Box Saved* fields of the Info/Status Screen change from NEVER to the current date and time.
6. As appropriate, continue defining the User ID mailbox using the Auto and Notify Menus.

See "Auto (Scheduling) Menu" on page 6-20 and "Notify Menu" on page 6-27 for detailed information.

Modify User ID Mailbox

1. From the Users Menu, Options screen, type the User ID mailbox number in the User ID field. Press **Enter**. Stratagy automatically loads the User ID mailbox. If the User ID does not exist, Stratagy assumes that you are creating a new User ID mailbox (see "Create a Mailbox" above).

Note To determine whether a particular User ID has already been created, look at the *Box Created* field in the Info/Status Screen.

2. Access the Users Menu screens as needed and define the User fields (user's information, basic options, AMIS options, groups, chains, menus).

Notes

- Use **Enter** or the arrow keys (↑↓) to move between fields.
- To display detailed help for the current field, press **F1**.

3. When finished, press **Alt**+**S**. The User ID mailbox is saved.
4. As appropriate, continue defining the User ID mailbox using the Auto and Notify Menus.

See "Auto (Scheduling) Menu" on page 6-20 and "Notify Menu" on page 6-27 for detailed information.

Copy Mailbox(es)

When you copy a User ID mailbox, Stratagy uses the existing mailbox as a template to create the new mailboxes.

Notes

- User's Information fields are not copied. The User ID field contains the new User ID you specified. Comment, Extension, and Directory Name fields are not defined. If the Security Code field is defined in the Defaults Box User ID, Stratagy uses it instead of the User ID.
- All other Users Menu Options and Group/Chains fields are copied. All Notify and Auto records are copied.

1. From the Users Menu, Options screen, type the User ID mailbox number in the User ID field. Press **Enter**. Stratagy automatically loads the User ID mailbox.
2. Press **Alt**+**C**. A pop-up box displays (shown right).
3. Type the range. Press **Enter**. Stratagy creates the specified range of User ID mailboxes using the displayed User ID mailbox as a template.
4. To customize the first User ID mailbox copied, define the User fields (user's information, basic options, AMIS options, groups, chains, menus).

Note Use **Enter** or the arrow keys (↑↓) to move between fields.

5. Press **Alt**+**S**. The changes are saved.
6. As appropriate, continue defining the User ID mailbox using the Auto and Notify Menu.

   See "Auto (Scheduling) Menu" on page 6-20 and "Notify Menu" on page 6-27 for detailed information.

7. Repeat Steps 4~6 for each of the User ID mailboxes copied.

Delete Mailbox

Important! *When you delete an existing User ID mailbox, all messages and recordings for the mailbox are deleted.*

CAUTION! Delete all Guest User IDs of this User ID mailbox before deleting the User ID mailbox.

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1. From the Users Menu, Options screen, type the User ID mailbox number in the User ID field. Press **Enter**. Stratagy automatically loads the User ID mailbox.
2. Press **Alt**+**D**. You are asked to confirm the deletion.

CAUTION! Once deleted, there is no way to retrieve the User ID mailbox.

---

3. Verify that this is the User ID mailbox you want to delete. Press **Y**. The User ID is deleted.

BoxList

This is a list of User ID mailboxes. The User IDs appear in numerical order. Each entry on the list contains the *Comment*, *Extension*, *Name (Directory Name 1*, *Directory Name 2*), and *Messages (Messages Current)* field information. For field definitions, see "Options Screen" on page 6-8.

View Existing User ID Mailboxes

1. Press **Alt**+**T**. A pop-up box displays (shown right).

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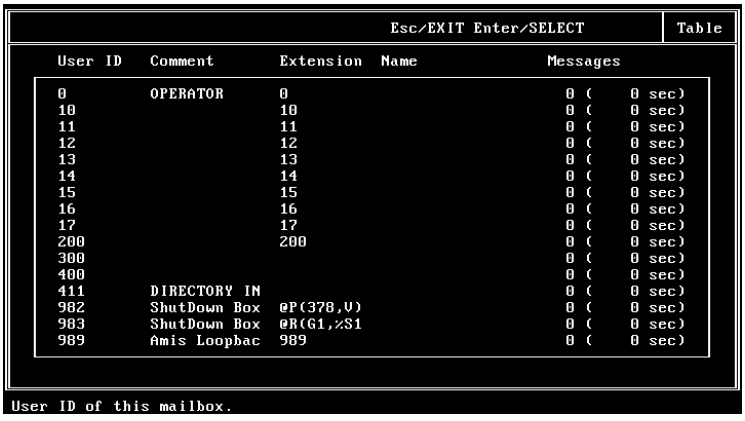
2. Press **Enter**. The BoxList screen displays (shown right).
3. Use the arrow keys (↑↓) or the **Page Up/Down** keys to scroll through the list.
4. Press **Esc**. The Users Menu displays.



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Access a Specific User ID from BoxList Screen

1. From the Table BoxList screen, use the arrow keys (↑↓) to highlight the User ID.
2. Press **Enter**. The Users Menu displays the selected User ID's information.

AmisNodeList

The AmisNodeList lists mailboxes that have "Gateway Box" set to Yes. See "AmisNodeList" on page 9-8 for information on using this feature.

Users Menu Field Descriptions

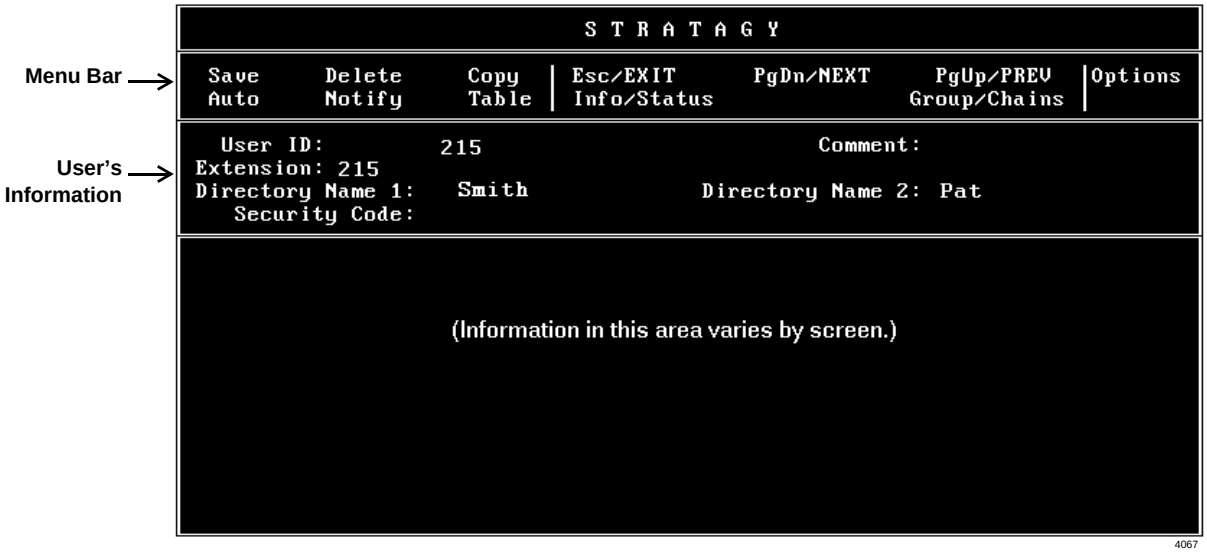


Figure 6-1 Options Screen with Sample Data

Table 6-1 Users Menu Screen Fields

Menu Bar Access and viewing options.	
Save	Press **Alt+S** to save the current User ID mailbox.
Delete	Press **Alt+D** to delete the current User ID mailbox.
Copy	Press **Alt+C** to copy the current User ID mailbox.
Auto	Press **Alt+A** to access the Auto Menu.
Notify	Press **Alt+N** to access the Notify Menu.
Table	Press **Alt+T** to select a table: **BoxList:** Press **Enter** to list all User ID mailboxes. **AmisNodeList:** Use the arrow keys (↑↓) to highlight AmisNodeList and then press **Enter** to list all Amis nodes.
Esc/EXIT	Press **Esc** to exit the Users Menu and return to the Main Menu.
Pg/Dn NEXT	Press **Page Down** to view the next User ID mailbox.
PgUp/PREV	Press **Page Up** to view the previous User ID mailbox.
Options	Press **Alt+O** to access the current User ID's basic and AMIS options.
Info/Status	Press **Alt+I** to view the current User ID's statistics.
Group/Chains	Press **Alt+G** to access the current User ID's group, chain, and menu options.

Table 6-1 Users Menu Screen Fields *(continued)*

User's Information Minimum information Stratagy requires for a standard User ID that transfers calls and takes messages.	
User ID	User ID mailbox number. Usually associated with a telephone extension (for simplicity). Employees without a telephone extension can have a mailbox from which they can send and receive messages. Mailboxes can be used for special functions such as directories or question and answer surveys. Possible values: 0~99999999 (must be unique).
Comment	Notation or reminder about the function of the mailbox. For example, a User ID may be identified by function (extension, information box, etc.) or contents (greeting, directory, etc.).
Extension	Programmed dial actions Stratagy performs to transfer a call that has accessed the User ID (i.e., *Do Not Disturb* is Off). Includes transfer to a User ID mailbox, a remote number, or paging. Normally a simple extension number. Default: value entered in *User ID* field.
Directory Name 1	The first of two names Stratagy searches when a caller uses the directory (default 411). For most companies, this is the User ID owner's first name. For User IDs that do not appear in the directory, leave this field blank. **Notes** • It is important that each user record his/her name. • When the System Administrator enters a user's name into the directory using the telephone dial pad, the name is stored in the Options screen *Directory Name 1* and *Name 2* fields as numeric digits. For administration clarity, it is advisable to change the digits to their alpha equivalents. The directory works as follows. If a caller wants to speak with Donna, the caller would enter digits corresponding to these letters on the tone-dialing telephone (i.e., **36662**). For the first User ID *Directory Name* field that matches the caller's entry, Stratagy plays the name recording. Depending upon the Stratagy System Configuration parameter *dir_play_uid*, Stratagy also plays the digits of the *User ID* field. If no name recording is available, depending on the *dir_play_uid* setting, Stratagy does not present an entry or play the digits of the *User ID* field. Since Stratagy plays the name recording of all User IDs that match a caller's entry for the company directory, you can use this capability as a general search and playback system. The User ID used for directory searching can be defined on a per-port basis using the *box_idx* Stratagy System Configuration parameter. For details about the Stratagy System Configuration parameters, see Chapter 4 – Configure Stratagy.
Directory Name 2	The second of two names Stratagy searches when a caller uses the directory (default 411). For most companies, this is the User ID owner's last name or another way to reference this User ID, such as a variation in spelling (Cathy, Kathy) or a nickname (Michael, Mike). It can also be used for the name of an additional user when a User ID is shared. For User IDs that do not appear in the directory, leave this field blank.

Table 6-1 Users Menu Screen Fields *(continued)*

Security Code	Password that permits the user access to this User ID mailbox. The security code ensures that only appropriate users can change greeting, record custom busy message, listen to messages left for this User ID, or change option settings. The initial value is the number of the new mailbox plus the value in the Defaults Box User ID (default 997) *Security Code* field. For example, the security code for default box 997 is 997. If a mailbox 234 is created, the default security code for the new mailbox is 234997. The only exception to this rule is the security code for the Defaults Box User ID (default 997). Its security code would be 997. If the security code of the Defaults Box User ID (default 997) is changed, only the mailboxes created after rebooting the system have the new default security code. If the security code is set to something untypeable at a telephone (such as an X), no one can log into the User ID mailbox. The user can change the password to assure confidentiality. For added security, the code does not display on the screen. You cannot view the security code; you can only change it.

Options Screen

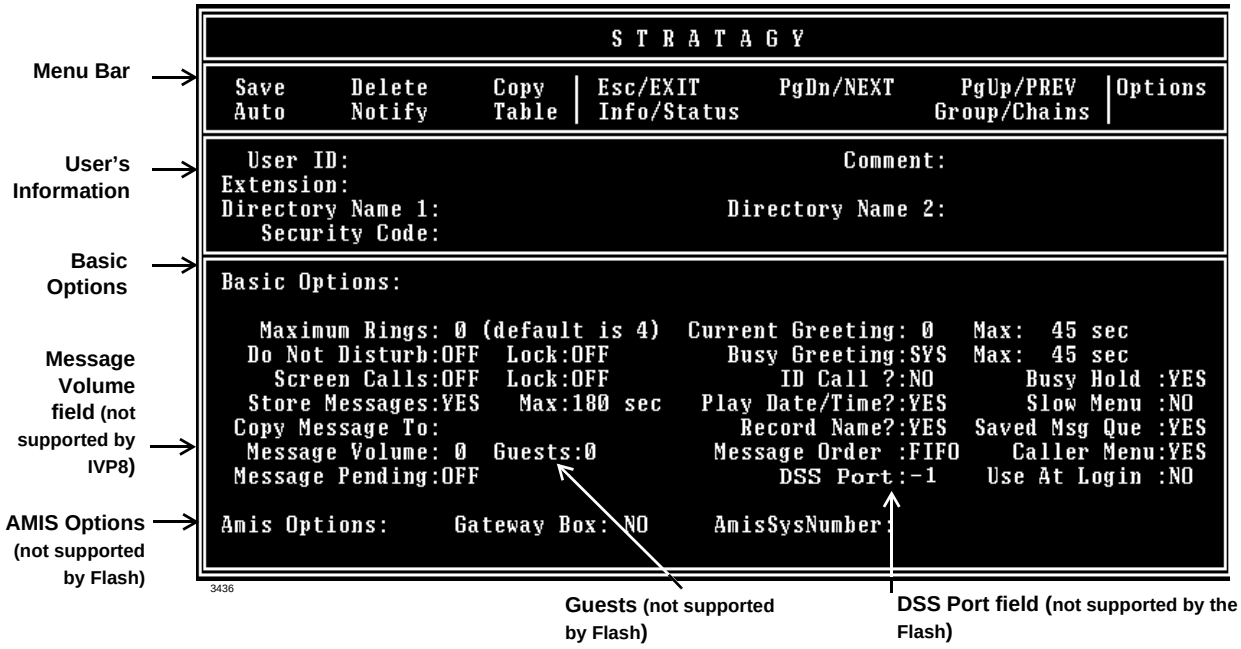


Figure 6-2 Options Screen with Sample Data

Table 6-2 Options Screen Fields

Menu Bar See "Users Menu Field Descriptions" on page 6-5 for a definition of the fields.	
User's Information See "Users Menu Field Descriptions" on page 6-5 for a definition of the fields.	
Basic Options RNA, DND, Call Screening, and message information for the User ID mailbox.	
Ring No Answer (RNA)	
Maximum Rings	When transferring a call to the User ID, the number of rings Stratagy waits before determining a RNA status. This option only works when Stratagy is controlling the call transfer during a monitored, or supervised transfer. For example, if the telephone is not answered within four rings, Stratagy may play this User ID's greeting and take a message, or transfer the call to another extension if an *RNA* chain is being used. Possible values: 0 (uses system default), 1~9 Default: 4

Table 6-2 Options Screen Fields *(continued)*

Do Not Disturb (DND)	
Do Not Disturb	Whether Stratagy transfers callers directly to a user's mailbox without ringing the user's phone. If *Lock Do Not Disturb* is set to Off, the user can toggle this feature on or off through the telephone. If the intention of the User ID is to offer recorded information, set *Do Not Disturb* to On and *Lock Do Not Disturb* to On. On: *Do Not Disturb* is On. Calls to this User ID are never transferred to an extension. The greeting plays immediately. Off: *Do Not Disturb* is off. Possible values: On, Off Default: Off (DND not active)
Lock	Locks the current *Do Not Disturb* setting. The current *Do Not Disturb* setting cannot be changed by the user through the telephone. If the intention of the User ID is to offer recorded information, set *Do Not Disturb* to On and *Lock Do Not Disturb* to On. On: User is not permitted to access or change the *Do Not Disturb* setting through the telephone. Off: User can change the *Do Not Disturb* setting. Possible values: On, Off Default: Off (not locked)
Call Screening	
Screen Calls	Whether Stratagy asks the caller to record his name before attempting a transfer to the user's extension, enabling a user to accept, decline, or transfer the call: On: Stratagy asks the caller to record his name, and then attempts to reach the user. If the user answers, Stratagy plays that recording. The user can press: **1** to accept the call. Stratagy connects the caller to the user. **2** to reject the call and hang up. Stratagy reconnects the caller and plays the user's mailbox greeting. Stratagy follows the procedures used for the Ring No Answer chain. **3** to transfer the call with an announcement. The user dials the extension to transfer the call and hangs up. Stratagy plays "Your call is being transferred to" and the name recording or the User ID of the extension where the call is being transferred. Stratagy transfers the caller to the new extension. **4** to transfer the call without announcement. The user dials the extension to transfer the call and hangs up. Stratagy asks the caller to continue to hold and transfers the caller to the new extension. Off: Stratagy transfers the caller to the extension without inquiry. Possible values: On, Off Default: Off (Call screening is off)
Lock	Locks the current *Screen Calls* setting. The current *Screen Calls* setting cannot be changed by the user through the telephone. On: User is not permitted to access or change the *Screen Calls* setting through the telephone. Off: User can change *Screen Calls* selection. Possible values: On, Off Default: Off (not locked)

Table 6-2 Options Screen Fields *(continued)*

Messages and Greetings	
Store Messages	Whether Stratagy enables the User ID mailbox to store messages. Certain applications require a User ID mailbox to play information only and not record messages. To prevent Stratagy from taking messages after the User ID's greeting plays, set *Store Messages* to No and *Copy Messages To* to blank. Yes: This User ID mailbox may store messages. No: This User ID mailbox may not store messages. **Note** If *Copy Message To* has a valid User ID, the message is recorded, then stored in the *Copy Message To* User ID mailbox. Possible values: Yes, No Default: Yes (*Store Messages* is On)
Max (Store Messages)	Maximum message length in seconds a caller is given when leaving a message. Possible values: 0 (unlimited), 1 ~ 999 (seconds) Default: 180 (180 seconds = 3 minutes)
Copy Messages To	User ID mailbox which receives a copy of this User ID mailbox's messages. **Note** Messages can only be copied once. Stratagy does not chain copy to multiple mailboxes. If *Store Messages* is set to Yes, Stratagy stores the message in both the accessed User ID mailbox and the *Copy Messages To* User ID mailbox. If *Store Messages* is set to No, Stratagy stores the message only in the *Copy Messages To* User ID mailbox. Certain applications require a User ID mailbox to play information only and not record messages. To prevent Stratagy from taking messages after the User ID's greeting plays, set *Store Messages* to No and *Copy Messages To* to blank. Possible values: blank, valid User ID mailbox Default: blank (*Copy Messages To* is off)
Message Volume	Volume at which messages are played back to the user. This value can be set by the user through the telephone, using the Play Message Controls. **Note** The IVP8 does not support this feature. Possible values: -8 (softest) ~ 8 (loudest) Default: 0
Guests	Number of Guest User IDs the User ID can create. For each Guest User ID created, the value decrements by 1. For example, if the *Guests* field was set to 5 and the user created 3 Guest User IDs, *Guests* would now display 2. 0 ~ 99: Number of Guest User IDs the user can create. -1: User cannot use the Guest User ID feature **Note** The Flash does not support this feature. Possible values: -1 (cannot use Guest User IDs) 0 ~ 99 Default: -1

Table 6-2 Options Screen Fields *(continued)*

Message Pending	Messages that a user partially hears (five seconds or longer set by *msg_pending_threshold* parameter) are called Pending messages. They remain in the New Message Queue, the Message Waiting LED is turned off, and a Return Receipt is sent, if applicable. **Note** If the *Saved Msg Que* field is set to No, the setting for this field has no effect on the voice mail system. Yes: This User ID mailbox may store pending messages. No: This User ID mailbox may not store pending messages. Possible values: Yes, No Default: No (*Message Pending* is Off)
Current Greeting	Which of eight User ID greetings plays. This value can be set by the user through the telephone unless *Current Greeting Max* is set to 0. Each mailbox user may record up to seven custom greetings. The system default greeting is "Please leave a message for [name]," as per the user's name recording. Possible values: 0, 1~7 Default: 0 (system greeting)
Max (Current Greeting)	Maximum greeting length (seconds) for each custom greeting recorded by the user. Whether the user can change the current greeting. Possible values: 0 (user cannot record or change greetings), 1~999 Default: 45
Busy Message	Greeting caller receives when the extension is busy. This value can be set by the user through the telephone unless *Busy Greeting Max* is set to 0. (See "Manage Your Mailbox" in the *Stratagy User Guide* for more information.) SYS: System busy greeting. Stratagy advises the caller that he may hold for the extension by pressing *, dial another extension, or leave a message by waiting for the tone. If the caller chooses to hold, Stratagy informs the caller of his position in the hold queue and then plays 30 seconds of the Busy-Hold Music file before trying the extension again. After each transfer attempt, the caller is given the same options. CUS: Custom busy greeting. Possible values: CUS, SYS Default: SYS
Max (Busy Message)	Maximum greeting length (seconds) for the custom busy greeting recorded by the user. Whether the user can change the busy greeting. Possible values: 0 (user cannot record or change greeting), 1~999 Default: 45 (seconds)
ID Call?	Identify callee. Play the name recording of the User ID mailbox the caller dialed. Yes: Stratagy plays the name recording of the User ID accessed to reach the extension. Used when more than one User ID mailbox is assigned to the same telephone extension. No: Stratagy plays a connection tone to the answering party. Possible values: Yes, No Default: No

Table 6-2 Options Screen Fields *(continued)*

Busy Hold	Whether a caller can press * to hold when the extension is busy. Yes: The caller can press * to hold. No: The caller cannot hold. Possible values: Yes, No Default: Yes
Play Date/Time?	During message playback, play the date and time a message was recorded. Yes: Play the date and time before playing the message. No: Do not play date and time. Possible values: Yes, No Default: Yes (play date and time).
Slow Menu	Length of time Stratagy pauses between User ID mailbox menu choices when stating them to the user (e.g. Main Menu options). Yes: Add extra time between menu choices. No: Do not add extra time. Possible values: Yes, No Default: No
Record Name?	Whether the user can record his/her name for playback/identification to a caller. Yes: User can record his/her name No: User cannot record his/her name. Possible values: Yes, No Default: Yes
Saved Msg Que	Whether Stratagy uses separate message lists of new and saved messages. Yes: Two message queues: new and saved. No: One message queue. Possible values: Yes, No Default: Yes **CAUTION! Delete all messages in this mailbox before changing the number of message queues.**
Message Order	Order in which Stratagy plays back caller messages to the user. FIFO: First-In First-Out. Stratagy plays the oldest messages first. LIFO: Last-In First-Out. Stratagy plays the most recent message first. Possible values: FIFO, LIFO Default: FIFO
Caller Menu	Whether Stratagy presents a message menu to outside callers. Yes: Before pressing # to send a message, outside callers can review, re-record, append, add destinations, set urgent or private, or cancel. No: Outside callers can only press # to send a message. Possible values: Yes, No Default: Yes
Alternate Rate	This option is replaced by the *DSS Port* field on the IVP8 and is not supported by the Flash.

Table 6-2 Options Screen Fields *(continued)*

DSS Port (available only on IVP8 menu)	This field is indicative of the button position of a DSS console with default programming. Simply put, the IVP8 assumes that the programming of the DSS console is fixed and cannot be changed. The IVP8 always identifies key 01 of the DSS console as port 000. So if a port other than 000 is programmed under key 01, the *DSS Port* field for that corresponding mailbox is "000." **Example** Let's say that a programmer has changed key 01 in Program 29 (Strata DK424i/DK424) to provide BLF indication for port 023, and the extension associated for that port, which by default is extension 223, has a corresponding mailbox in the IVP8. If the IVP8 is expected to monitor busy activity for this extension, the DSS Port setting for Mailbox 223 would be "023." **Important!** *If the dss_active parameter in the install.cfg file is set to false, this field is disabled.* Possible values: 0~57, -1 disables feature Default: -1
Use At Login	Whether Stratagy plays messages at the alternate rate when a user logs in. Yes: Stratagy uses the alternate rate. No: Stratagy uses the normal rate. Possible values: Yes, No Default: No
AMIS Options AMIS information for the User ID mailbox.	
Gateway Box	Whether this User ID mailbox is an AMIS gateway. **Note** The Flash does not support this feature. Possible values: Yes, No Default: No
AmisSysNumber	Telephone number of the AMIS gateway box used to identify incoming AMIS calls. This number is the same as to the identification number of a remote node. **Note** The Flash does not support this feature. Format: 1#area code#number Example: 1#714#5551212

Group/Chains Screen

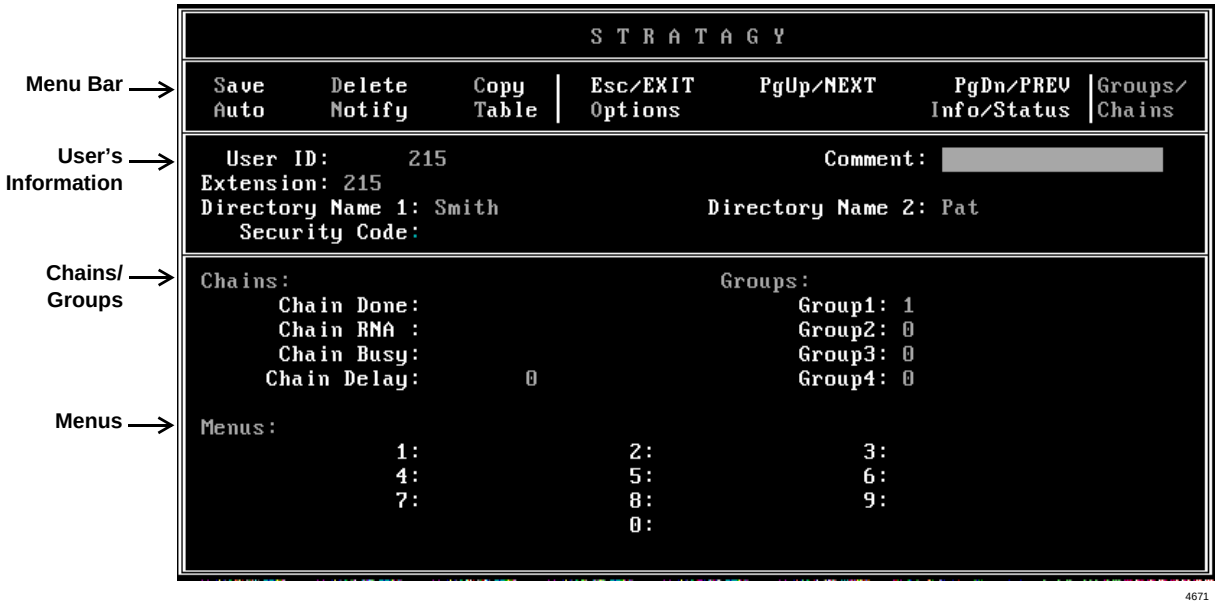


Figure 6-3 Groups/Chains Screen with Sample Data

Table 6-3 Groups/Chains Screen Fields

Menu Bar See "Users Menu Field Descriptions" on page 6-5 for a definition of the fields.	
User's Information See "Users Menu Field Descriptions" on page 6-5 for a definition of the fields.	
Chains Chain information for the User ID mailbox.	
	Chains are how you tell Stratagy what to do with a call when one of three specific conditions apply: Done, RNA, Busy. **CAUTION! Avoid programming chains that contain loops. For normal Stratagy operation, we recommend that you program all chains to eventually end at System Administrator User ID 999 (which defaults to disconnect, @H) and never change the User ID 999 default.** Stratagy, by enabling you to program chains, provides the flexible call routing solutions needed for many varied customer applications. If you create a loop when programming Stratagy with chains of User IDs, all Stratagy ports become busy and you must reboot the system. Conditions which create loops include: • The most common condition is usually triggered by no caller DTMF action followed by a hang up. For the following explanation, assume that the reserved User IDs are set to their default values. Operator User ID 0 Caller Instructions User ID 991 System Administrator User ID 999

Table 6-3 Groups/Chains Screen Fields *(continued)*

	By default, if there is no caller DTMF action, all Stratagy User IDs return to Caller Instructions User ID 991 when done. User ID 991 defaults to *dtmf_gate*, which defaults to True. At *dtmf_gate*, Stratagy asks the caller to say "yes" if he would like to transfer to the Operator. If Stratagy detects any verbal response, Stratagy transfers the caller to the extension for the Operator User ID 0. If there is no response, Stratagy disconnects the caller. This is normal operation for Stratagy (see Chapter 5—How Stratagy Operates for more information). However, some applications require *dtmf_gate* to be False, so there is no query of the caller. If the gate is False and the Operator User ID 0 Done chain is set to Caller Instructions User ID 991 (or no *Done* chain, defaulting to 991), a loop has been created and Stratagy ports eventually lock up. To avoid this, you can program User ID 0 to have System Administrator User ID 999 as its Done chain (User ID 999 defaults to disconnect, @H). • Programming one or more User IDs *Done* chains to loop back to the same User IDs causes Stratagy ports to lock up. For example; do not program User ID 200 *Done* chain to User ID 200. And, do not program User ID 200 *Done* chain to User ID 201 and User ID 201 *Done* chain to User ID 200, etc.
Chain Done	Instructs Stratagy where to send a caller who remains on the line after leaving a message or after listening to an announcement only User ID mailbox. blank: Stratagy uses the *Done* chain of the Company Greeting User ID (generally 990), that normally points to User ID 991 (Caller Instructions User ID). Possible values: blank, another User ID Default: blank (*Done* chain of the Company Greeting User ID)
Chain RNA	Instructs Stratagy where to send a caller when there is a Ring No Answer at this User ID's extension. Defining an *RNA* chain enables Stratagy to control extension hunting. Possible values: blank, another User ID Default: blank (plays the current greeting for the mailbox)
Chain Busy	Instructs Stratagy where to send a caller when this User ID's extension is Busy. Possible values: blank, another User ID Default: blank (plays the busy greeting for the mailbox and takes a message)
Chain Delay	Number of tenths of seconds Stratagy waits after playing this User ID's greeting before continuing processing. Callers may enter DTMF to transfer processing to another User ID. Possible values: 10ths of seconds (a value of 10 equals 1 second) Default: 0 (no additional delay)

Table 6-3 Groups/Chains Screen Fields *(continued)*

Groups Group information for the User ID mailbox.	
	Groups control which User IDs a call can access. Each User ID mailbox user can be a member of up to four groups. To be able to access another User ID, the caller User ID must share at least one group number with the currently accessed User ID. If all groups are set to 0, then no other User ID may be accessed. For example, assume the following: User ID Group 1 Group 2 Group 3 Group 4 100 1 0 0 0 222 1 5 0 0 303 5 7 0 0 440 7 0 0 0 For the above example, User ID 100 may access User ID 222 only. User ID 222 may access User IDs 100 and 303. User ID 303 may access User IDs 222 and 440. User ID 440 may access User ID 303 only. Groups are useful for isolating different departments in the same company or different companies sharing one system. For example, suppose two companies share the same President, Vice President, and Controller and you would want them accessible to all companies; but each company has a different Human Resources department that you may want to prevent caller access from one to the other.
Group 1	First of four groups. Possible values: 0(not in use), 1~99,999,999 Default: 1 (Group 1. This is Stratagy's default; and may have been redefined during configuration.)
Group 2	Second of four groups. Possible values: 0 (not in use), 1~99,999,999 Default: 0 (not in use. This is Stratagy's default; and may have been redefined during configuration.)
Group 3	Third of four groups. Possible values: 0 (not in use), 1~99,999,999 Default: 0 (Not in use. This is Stratagy's default; and may have been redefined during configuration.)
Group 4	Fourth of four groups. Possible values: 0 (not in use), 1 ~ 99,999,999 Default: 0 (not in use. This is Stratagy's default; and may have been redefined during configuration.)

Table 6-3 Groups/Chains Screen Fields *(continued)*

Menus Menu information for the User ID mailbox.	
	Menus define the destination the call is sent when the caller presses 1 of the 10 possible menu options while listening to the mailbox's greeting. Menus can accommodate an unlimited number of special applications. Each User ID mailbox may reference up to 10 single-digit menu selections. Each menu selection may be assigned to a particular User ID. If the caller dials an assigned menu selection, Stratagy transfers the caller to the assigned User ID. Stratagy processes unassigned menu digits normally. For example, if the menu digit 0 is not defined and the caller dials 0, Stratagy selects User ID 0 (typically, the operator). A special function User ID mailbox set up for customer service using menus might be defined as follows. For Sales Assistance, press **1**; for Product Information, press **2**; for Service, press **3**; or press **0** for the operator. The menu set up would look like: 1: 222 2: 350 3: 516 4: 5: 6: 7: 8: 9: 0: 240 If the caller selects 1 (Sales Assistance), the call would be transferred to User ID mailbox 222. If the caller selects 2 (Product Information), the call would be transferred to User ID mailbox 350. If the caller selects 3, the call would be transferred to User ID mailbox 516 (Service). If the caller selects 0 (Operator), the call would be transferred to the customer service secretary at extension 240. If the caller presses a menu digit that does not contain a User ID, the call would be transferred to that User ID (e.g., pressing 7, would transfer the call to User ID 7).

Info/Status Screen

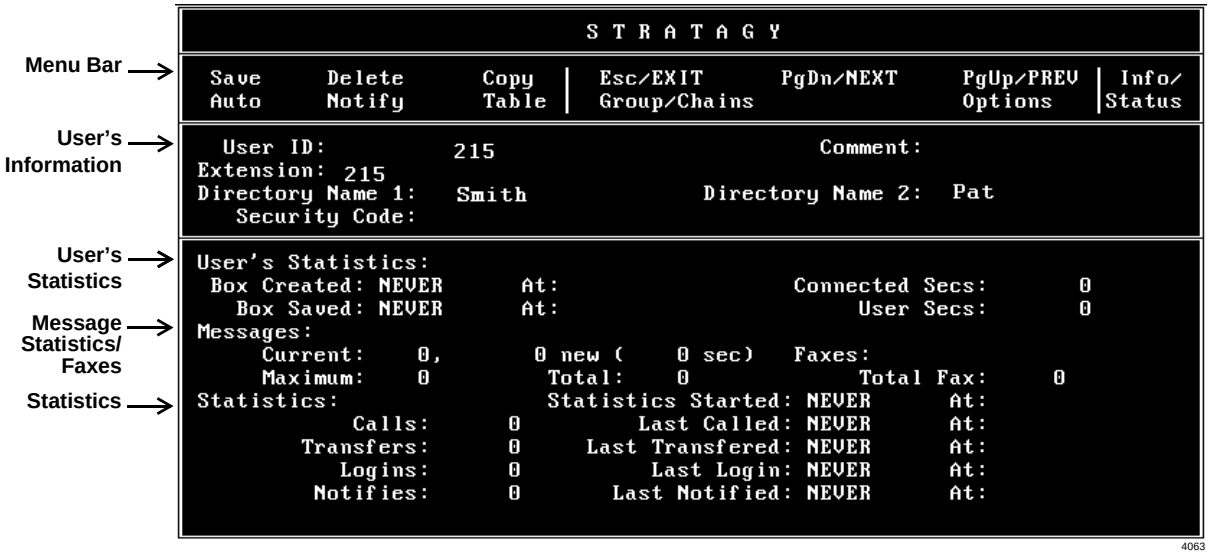


Figure 6-4 Info/Status Screen with Sample Data (this screen is for display only)

Table 6-4 Info/Status Screen Fields (Display Only)

Menu Bar See "Users Menu Field Descriptions" on page 6-5 for a definition of the fields.	
User's Information See "Users Menu Field Descriptions" on page 6-5 for a definition of the fields.	
User's Statistics Statistics (creation, saved and connect) for the User ID mailbox.	
Box Created	Date (mm/dd/yy) and time (hh:mm) the User ID mailbox was originally created. Time is in military format (24-hour clock).
Box Saved	Date (mm/dd/yy) and time (hh:mm) the User ID mailbox was last updated. Time is in military format (24-hour clock).
Connected Secs	Number of seconds callers have been connected to the mailbox since it was created.
User Secs	Number of seconds users have been connected to the mailbox since it was created.
Message Statistics Message statistics for the User ID mailbox.	
Current	Number of messages currently stored and number of seconds for playback of these stored messages.
New	Number of new messages.
Maximum	Maximum number of messages stored at the same time since the mailbox was created.
Total	Number of messages stored since the mailbox was created.

Table 6-4 Info/Status Screen Fields (Display Only) *(continued)*

Faxes Not supported.	
Total Faxes	
Statistics Call, transfer, log in and notify statistics for the User ID mailbox.	
Statistics Started	Last time statistics were reset. Statistics can be reset by selecting reset after running a System Report, using the Report option on the Main Menu, or by using the System Administrator User ID option of Reset User ID.
Calls	Number of times the User ID mailboxes was accessed by a caller since statistics were last reset.
Last Called	Date (mm/dd/yy) and time (hh:mm) of the last call. Time is in military format (24-hour clock).
Transfers	Number of times Stratagy successfully completed a call transfer to the extension associated with this User ID since statistics were last reset.
Last Transferred	Date (mm/dd/yy) and time (hh:mm) of the last transfer. Time is in military format (24-hour clock).
Logins	Number of times the mailbox user accessed the mailbox for message retrieval or other mailbox functions since statistics were last reset.
Last Login	Last time (date and time) the mailbox user accessed the mailbox for message retrieval or other mailbox functions since statistics were last reset. Time is in military format (24-hour clock).
Notifies	Number of times the mailbox user was notified of new messages.
Last Notified	Last time (date and time) the mailbox user was notified of new messages. Time is in military format (24-hour clock).

Auto (Scheduling) Menu

Customizing User ID mailboxes involves defining User IDs using the Users, Auto (Scheduling), and Notify Menus. This chapter discusses the following Auto (Scheduling) Menu functions:

- How Stratagy uses Auto Scheduling records
- Access and exit the menu
- Menu options
- Create, modify, or disable auto scheduling records
- Auto (Scheduling) Menu field descriptions

How Stratagy Uses Auto Scheduling Records

The Auto (Scheduling) Menu enables you to set up automatic changes for each User ID mailbox. You can set these changes to occur at a specific time, on certain days of the week, or on a specified date. For example, based on your Auto definition, Stratagy can answer your company's telephone during the day with your daytime (open) greeting and during off-hours with your nighttime (closed) greeting.

By defining Auto fields, you can schedule when a User ID mailbox can change the:

- DND setting
- Call Screening setting
- Greeting number
- Destination defined in the Extension field
- Number of rings before taking a message for this extension

The following concepts are the keys to understanding how Stratagy uses Auto Scheduling records:

- Stratagy waits for the right date, time, and day, and then makes the specified changes.
- The changes remain in effect until you either disable the Auto Scheduling record or another record with different options is scheduled to start.
- If the re-schedule information does not fall on a valid day, Stratagy increments the *Next Change* date until it falls on a valid day as defined by the *Days of the Week, Restricted To* field.

  For example, to schedule a greeting to play on Thanksgiving Day each year you would set the following fields to:

  - *Enabled*—**`Yes`**
  - *Change On*—**`11/24/99`** (Thanksgiving Day in 1999)
  - *At*—**`8:00`**
  - *And Every Month(s)*—**`12`**
  - *Restrict To:* **`MTWTFSS`**
    `NNNYNNN`

  Stratagy checks for the next Thursday after 11/24/99 and displays *Next Change:*11/28/99, which is the next day that meets the criteria specified in the record.

See Appendix A – Checklists/Forms for a form to use for defining Auto records.
See Chapter 5 – How Stratagy Operates for information about customizing User ID mailboxes.
See "Users Menu" on page 6-1 and "Notify Menu" on page 6-27 for information about the other menus. See Chapter 8 – Customization Examples for sample customized User ID mailboxes.

Access/Exit the Auto (Scheduling) Menu

See "Users Menu" on page 6-1 for information about accessing and exiting the Users Menu.

Access Auto Menu

➤ While viewing a specific User ID mailbox record, press **Alt+A**. The Auto Menu displays.

Exit Auto Menu

1. Press **Alt+S**. Your changes are saved.

Important! *To save your modifications to the current User ID mailbox, you must press* **Alt+S** *before pressing* **Esc**.

2. Press **Esc**. The Users Menu displays.

Auto Menu Options

The Auto (Scheduling) Menu (see Figure 6-5 and Table 6-5 on page 6-23) consists of four sections:

- Menu Bar: access and viewing options (select).
- User's Information: overlay of information about this User ID mailbox from the Users Menu (display).
- Auto Scheduling Record Summary: 10 one-line descriptions of existing schedules (display).
- Auto Scheduling Record Options: Auto fields for the record highlighted in the Auto Record Summary (modify).

Create Auto Scheduling Records

Important! *When creating Auto (Schedule) records, be careful that records do not overlap, begin or end at the exact same time.*

1. In the Auto Record Summary section of the Auto Menu, highlight the first available <*Disabled*> description line.

Note Use the **PgDn** and **PgUp** keys to move between lines.

2. Press the spacebar to toggle the Auto Record Options *Enabled* field to **YES**.
3. To change any field settings, place the solid color edit block that appears on the screen next to the field name. Type the information in the field and press **Enter**

   ...or for some fields, press the spacebar to toggle the value.

Notes

- Use **Enter** or the arrow keys (↑↓) to move between fields.
- To display detailed help for the current field, press **F1**. See "Online Help Function" on page 3-6.

4. When finished, press **Alt+S**. You are asked if you want to overwrite the Auto Record.
5. Press **Y**. Stratagy automatically transfers the data to the description line in the Auto Scheduling Record Summary highlighted in Step 1.

Modify Auto Scheduling Records

1. In the Auto Scheduling Record Summary section of the Auto Menu, highlight the record you want to define.

Note Use the **PgDn** and **PgUp** keys to move between lines.

2. If appropriate, press the spacebar to toggle the Auto Scheduling Record Options *Enabled* field to **YES**.
3. Define the Auto Scheduling Record Options fields.

Note To display detailed help for the current field, press **F1**.

4. When finished, press **Alt+S**. You are asked if you want to overwrite the current auto record.
5. Press **Y**. Stratagy automatically transfers the data to the description line in the Auto Scheduling Record Summary highlighted in Step 1.

Disable Auto Scheduling Records

1. In the Auto Scheduling Record Summary section of the Auto Menu, highlight the appropriate <*Enabled*> description line.

Note Use the **PgDn** and **PgUp** keys to move between lines.

2. Press the spacebar to toggle the Auto Scheduling Record Options *Enabled* field to **NO**.
3. When finished, press **Alt+S**. You are asked if you want to overwrite the current auto record.
4. Press **Y**. Stratagy automatically changes the description line in the Auto Scheduling Record Summary highlighted in Step 1 to <*Disabled*>.

Auto (Scheduling) Menu Field Descriptions

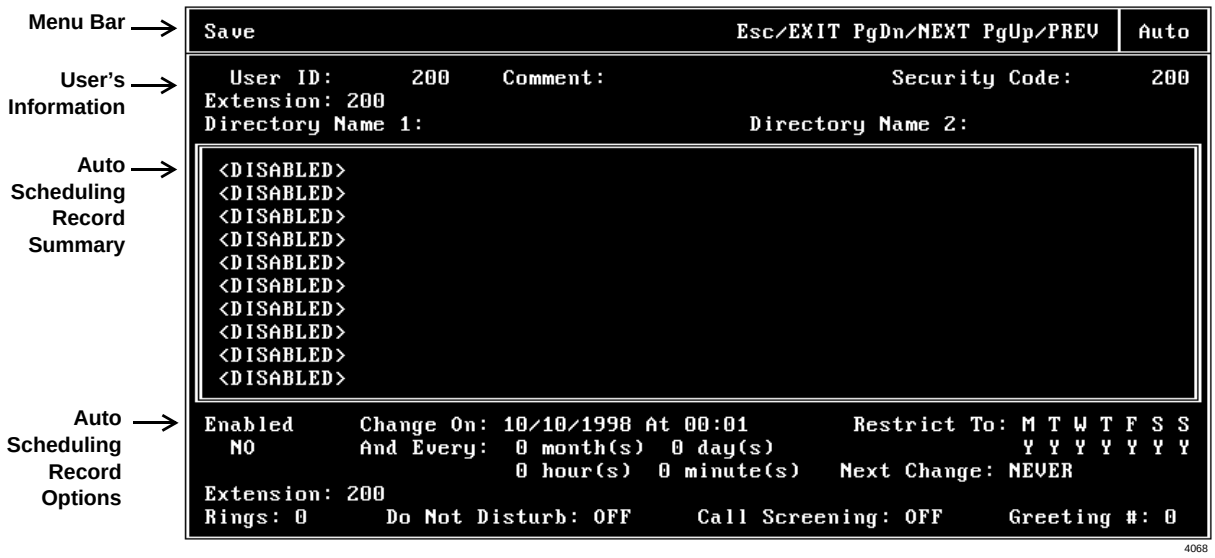


Figure 6-5 Auto Menu with Sample Data

Table 6-5 Auto Menu Screen Fields

Menu Bar Access and viewing options.	
Save	Press **Alt+S** to save the current Auto record.
Esc/EXIT	Press **Esc** to exit the Auto Menu and return to the Users Menu.
PgDn/NEXT	Press **Page Down** to view the next Auto record for this User ID.
PgUp/PREV	Press **Page Up** to view the previous Auto record for this User ID.
Auto	Menu title.
User's Information Display only—changes to these fields must be made in the Users Menu—see "Users Menu" on page 6-1.	
User ID	User ID mailbox number.
Comment	Notation or reminder about the functions of this mailbox.
Security Code	Password that permits the user access to the User ID mailbox. (Does not display.)
Extension	Programmed dial actions Stratagy performs to transfer a call that has accessed the User ID (i.e., *Do Not Disturb* is Off). Includes transfer to a User ID mailbox, a remote number, or paging.
Directory Name 1	The first of two names Stratagy searches when a caller uses the directory (default 411).
Directory Name 2	The second of two names Stratagy searches when a caller uses the directory (default 411).
Auto Scheduling Record Summary Display only—one-line descriptions of each existing Auto Scheduling record.	

Table 6-5 Auto Menu Screen Fields *(continued)*

Auto Scheduling Record Options Auto fields for the record highlighted in the Auto Scheduling Record Summary.	
Enabled	Enable or disable the current Auto record (auto scheduling). Yes Enable the record. Stratagy carries out the instructions defined by the record. No Disable the current Auto Schedule record. Possible values: Yes, No Default: No
First Scheduled Change	
Change On	Date (mm/dd/yyyy) of first scheduled change.
At	Time (hh:mm) of first scheduled change. Military format (24-hour clock). To guarantee that Stratagy programs a holiday schedule after the open greeting schedule, set the holiday greeting's *Change At* time one minute after the regular open greeting time in case the holiday and open greeting schedules take place on the same day.
Frequency of Change	
	Stratagy adjusts the next event time forward one day at a time per *Days of the Week, Restricted To* until the first valid day is found, regardless of the values in the *Frequency of Change* fields. To program holidays that occur on different days each year, such as Thanksgiving and Labor day, define the *Frequency of Change* fields of as 11 months and 29 days, restricted to the appropriate *Days of the Week*.
And Every Month(s)	Number of months before the change re-occurs at the time defined under *Change On/At*. For example, most holiday greetings would be set to occur every 12 months on the day specified. Possible values: 0~12 Default: 0 (months)
And Every Day(s)	Number of days before the change re-occurs at the time defined under *Change On/At*. With every 1 day, the change occurs daily; with every 14 days, the change occurs every two weeks. Possible values: 0~31 Default: 0 (days)
And Every Hour(s)	Number of hours before the change re-occurs. With every 12 hours, the change occurs twice daily. Possible values: 0~23 Default: 0 (hours)
And Every Minute(s)	Number of minutes before the change re-occurs. With every 30 minutes, the change occurs every half hour. Possible values: 0~59 Default: 0 (minutes)

Table 6-5 Auto Menu Screen Fields *(continued)*

Days of the Week	
Restricted To	Days of the week to which the change is restricted. Y: Change occurs on this day of the week. N: Change does not occur on this day of the week. Stratagy adjusts the next event time forward one day at a time until the first valid day is found, regardless of the values in the *Frequency of Change* fields. In the following example, the change is scheduled for Monday through Friday only. Restricted To:MTWTFSS YYYYYNN Possible values: Y, N Default: Y
Next Change	
Next Change	Display only—date and time the next change occurs (mm/dd/yyyy hh:mm). Time is expressed in military format (24-hour clock). If an Auto Scheduling record is disabled, this field displays NEVER.
User ID Settings	
Extension	New extension Stratagy rings when the record is active. More specifically, programmed dial actions Stratagy performs after the change occurs to transfer a call that has accessed the User ID (i.e., *Do Not Disturb* is Off). For example, ring a different extension after hours rather than during the day. Possible values: include User ID mailbox, telephone extension, Token Programming Language Default: Users Menu's Extension value for the User ID
Rings	When the change occurs, the maximum number of rings Stratagy must wait when transferring a call to the User ID before determining a Ring No Answer. Possible values: 0 (uses system default), 1~9 Default: 0
Do Not Disturb	Value for Do Not Disturb when the change occurs, even if the Users Menu's *Lock Do Not Disturb* is On. On: Stratagy plays the User's mailbox greeting to the caller without attempting to ring the extension. Off: Stratagy follows the dialing instructions provided in the *Extension* field. Possible values: On, Off Default: Off (DND not active)

Table 6-5 Auto Menu Screen Fields *(continued)*

Call Screening	Value for *Call Screening* when the change occurs, even if the Users Menu's *Lock Call Screening* is On. On: Stratagy asks the caller to record his name, and then attempts to reach the user. If the user answers, Stratagy plays that recording. The user can press: **1** to accept the call. Stratagy connects the caller to the user. **2** to reject the call and hang up. Stratagy reconnects the caller and plays the user's mailbox greeting. Stratagy follows the procedures used for the Ring No Answer chain. **3** to transfer the call with an announcement. The user dials the extension to transfer the call and hangs up. Stratagy plays "Your call is being transferred to" and the name recording or the User ID of the extension where the call is being transferred. Stratagy transfers the call to the new extension. **4** to transfer the call without announcement. The user dials the extension to transfer the call and hangs up. Stratagy asks the caller to continue to hold and transfers the call to the new extension. Off: Stratagy transfers the call to the extension without inquiry. Possible values: On, Off Default: Off (*Call Screening* is off)
Greeting #	Which of eight greetings—the system greeting or one of seven User ID greetings—this extension/mailbox plays when the change occurs. Plays even if Users Menu's *Current Greeting Max* is set to 0 (user cannot change greeting). Possible values: 0, 1~7 Default: 0 (system greeting)

Notify Menu

Customizing User ID mailboxes involves defining User IDs using the Users, Auto (Scheduling), and Notify Menus. This chapter discusses the following Notify Menu functions:

- How Stratagy uses Notify records
- Templates
- Access/exit the menu
- Menu Options
- Create, modify, or disable records/templates
- Notify Menu field descriptions

How Stratagy Uses Notify Records

The Notify Menu enables you to program Stratagy to automatically notify a caller of messages, or a System Administrator of low-disk space or unsuccessful system startup. There are ten Notify records available for each User ID. Each record represents one method of notifying the user of new messages.

The six types of notification (normal, relay, pickup, disk, urgent and panic) are based on the action that activates the notification. Notification methods are programmed using the Token Programming Language (see Appendix B – Special Greeting User ID Mailboxes) and include message waiting lights, beepers, pagers, other telephones (inside extensions or outside numbers), and office paging systems.

By using available templates (predefined notification instructions), fields may be defined and assigned to one or more mailboxes that require the same type of notification (for example, message waiting lights). Stratagy accommodates variable information, such as the User's extension number when lighting a message light, to streamline notification set up.

Notification can occur based on the following:

- Days of the week
- Hours of the day
- Time interval between notifications (e.g., every 30 minutes)
- Number of times to repeat notification process (e.g., two times)

See Appendix A – Checklists/Forms for a form to use when defining Notify records.
See Chapter 5 – How Stratagy Operates for information about customizing User ID mailboxes. See "Auto (Scheduling) Menu" on page 6-20 and "Notify Menu" on page 6-27 for information about the other menus. See Chapter 8 – Customization Examples for sample customized User ID mailboxes.

Templates

Templates are general notification actions which may be used for any number of Notify records and User ID mailboxes. By having User IDs share templates, you can make changes to all notification records for those User IDs by simply changing one template.

Stratagy provides a group of preset templates covering notification methods for Toshiba telephone systems, SMDI, AMIS, and paging applications. These default templates can be used as is or modified for other related purposes. See "Create Notify Records/Templates" on page 6-29 and "Modify Notify Records/Templates" on page 6-29 for instructions on creating and modifying templates.

View Existing Templates

1. From the Notify Menu, press **Alt**+**T**. A dialog box with a list of templates displays.
2. Highlight the template you want, using the **Page Down** and **Page Up** keys and press **Enter**. Stratagy displays the template information in the appropriate Notify Record Options fields.

Access/Exit the Notify Menu

See "Users Menu" on page 6-1 for information about accessing and exiting the Users Menu.

Access the Notify Menu

➤ While viewing a specific User ID mailbox record, press **Alt+N**. The Notify Menu displays.

Exit Notify Menu

1. Press **Alt+S**. Your changes are saved.

Important! *To save your modifications to the current User ID mailbox, you must press* **Alt+S** *before pressing* **Esc**.

2. Press **Esc**. The Users Menu displays.

Notify Menu Options

The Notify Menu (see Figure 6-6 and Table 6-6 on page 6-31) consists of four parts:

- Menu Bar: access and viewing options (select).
- User's Information: overlay of information about this User ID mailbox from the Users Menu (display).
- Notify Record Summary: ten one-line descriptions of existing notifications (display).
- Notify Record Options: Notify fields for the record highlighted in the Notify Record Summary (modify).

Create Notify Records/Templates

1. In the Notify Record Summary section of the Notify Menu, highlight the first available <*Disabled*> description line.

Note Use the **PgDn** and **PgUp** keys to move between lines.

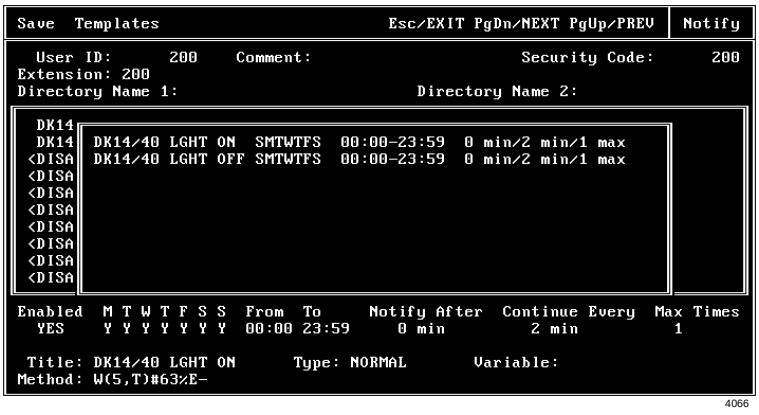
2. Press the spacebar to toggle the Notify Record Options *Enabled* field to **YES**.
3. Define the Notify Record Options fields

Note Use **Enter** or the arrow keys (↑↓) to move between fields. To display detailed help for the current field, press **F1**.

...or press **Alt**+**t** to select a template. The Template screen displays (shown right).

Highlight the template, using the **Page Down** and **Page Up** keys and press **Enter**.

Stratagy displays the template information in the appropriate Notify Record Options fields.



4. (Optional) If you are using a template and the *Method* field contains the characters **%V**, fill in the *Variable* field with the appropriate telephone number or information.
5. Press **Alt**+**S**. You are asked if you want to add a new template.
6. Type **Y**. You are asked if you want to overwrite the Notify Record.
7. Type **Y** again.

   Stratagy adds this Notify record to the template database, overwrites the default notification template with this information and automatically transfers the data to the description line in the Notify Record Summary highlighted in Step 1.

Modify Notify Records/Templates

Important! *Modifying the template changes the template for all User IDs using the template.*

1. In the Notify Record Summary section of the Notify Menu, highlight the first available <*Disabled*> description line.

Note Use the **PgDn** and **PgUp** keys to move between lines.

2. If appropriate, press the spacebar to toggle the Notify Record Options *Enabled* field to **YES**.
3. Define the Notify Record Options fields. Use **Enter** or the arrow keys (↑↓) to move between fields. To display detailed help for the current field, press **F1**.
4. When finished, press **Alt**+**S**. Your changes are saved and Stratagy prompts (shown right):

   C: (cancel) Prevent the Notify record from overwriting the existing template.

   R: (replace template) Overwrite the old template with this new Notify record.

A: (add) Add this Notify record to the template database as a new template.

Important! *Replacing an existing template affects all User ID mailboxes currently using the template unless the change is confined to the Notify record's Variable field.*

5. Enter **C** for cancel, **R** for replace template or **A** for add. Stratagy automatically transfers the data to the description line in the Notify Record Summary highlighted in Step 1.

Disable Notify Records/Templates

1. In the Notify Record Summary area of the Notify Menu, highlight the appropriate <*Enabled*> description line.

Note Use the **PgDn** and **PgUp** keys to move between lines.

2. Press the spacebar to toggle the Notify Record Options *Enabled* field to **NO**.
3. Press **Alt**+**S**. You are asked if you want to overwrite the current record.
4. Press **Y**. Stratagy automatically disables the appropriate description line in the Notify Record Summary. In addition, Stratagy keeps the original information so you can reactivate the Notify record by changing the *Enabled* field to **YES**.

Notify Menu Field Descriptions

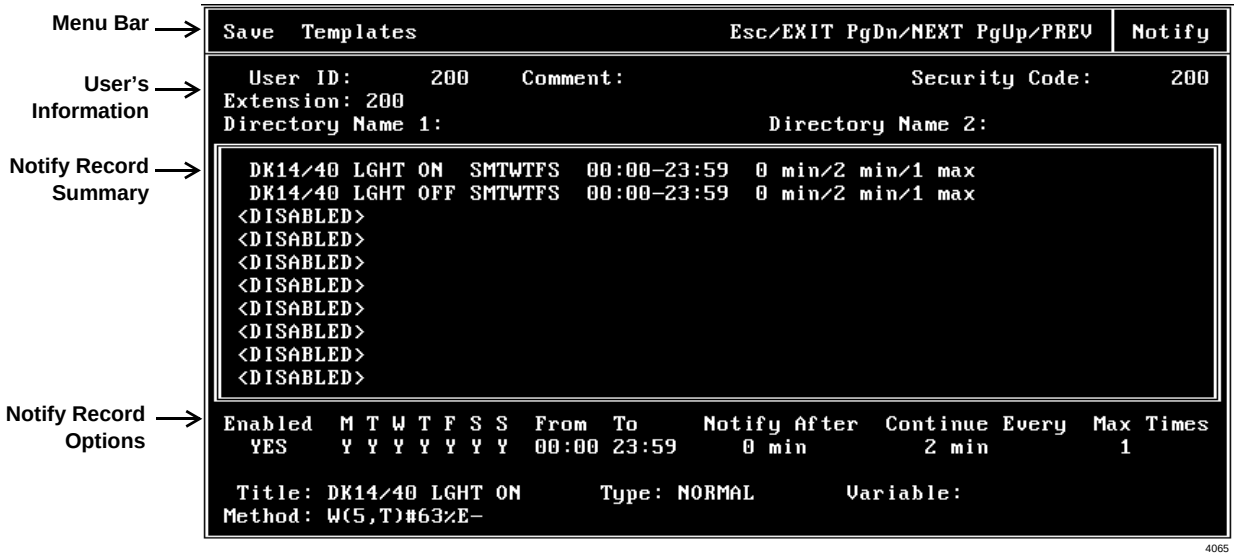


Figure 6-6 Notify Menu with Sample Data

Table 6-6 Notify Menu Screen Fields

Menu Bar Access and viewing options (select).	
Save	Press **Alt+S** to save the current new or modified Notify record.
Templates	Press **Alt+T** to view existing template (pre-set notification instructions).
Esc/EXIT	Press **Esc** to return to the Users Menu.
Page Down/NEXT	Press **Page Down** to view the next Notify record for the User ID.
Page Up/PREV	Press **Page Up** to view the previous Notify record for the User ID.
Notify	Menu title.
User's Information Display only—changes to these fields must be made in the Users Menu—see "Users Menu" on page 6-1.	
User ID	User ID mailbox number.
Comment	Notation or reminder about the function of the mailbox.
Security Code	Password that permits the user access to the User ID mailbox. (Does not display.)
Extension	Programmed dial actions Stratagy performs to transfer a call that has accessed the User ID (i.e., Do Not Disturb is Off). Includes transfer to a User ID mailbox, a remote number, or paging.
Directory Name 1	The first of two names Stratagy searches when a caller uses directory (default 411).
Directory Name 2	The second of two names Stratagy searches for when a caller uses the directory (default 411).
Notify Record Summary Display only—10 one-line descriptions of existing notifications.	

Table 6-6 Notify Menu Screen Fields *(continued)*

Notify Record Options Notify fields for the record highlighted in the Notify Record Summary area.	
Enabled	Enable or disable the current Notify record. Yes: Enable the record. Stratagy carries out the instructions defined by the record. No: Disable the current Notify record. **Important!** *Using Stratagy's User Notification option for his/her User ID mailbox, a user can enable or disable an existing Notify record and modify the contents of the record's Variable field.* Possible values: Yes, No Default: No (disabled)
Frequency of Notification	
MTWTFSS	Days of the week to which notification is restricted. Y: Notification occurs on this day of the week. N: Notification does not occur on this day of the week. In the following example, notification is scheduled for Monday, Wednesday, and Friday only. Restricted To:MTWTFSS YNYNYNN Possible values: Y, N Default: Y
From	Start notification time (hh:mm). Military format (24-hour clock); e.g., 5:30 p.m. is represented as 17:30. Always less than *To*. To specify 24 hours, set *From* at 00:00 and *To* at 23:59. Default: 00:00
To	End notification time (hh:mm). Military format (24-hour clock). Always more than *From*. To specify 24 hours, set *From* at 00:00 and *To* at 23:59. Default: 23:59
Notify After	Number of minutes before Stratagy attempts the first notification to a user after someone leaves a new message. **Important!** *If this is the only enabled Notify record, use the default value 0. If there is more than one enabled Notify record for the same date and time, set Notify After to a different number of minutes for each record. This avoids potential conflict.* Possible values: 0~ 60 Default: 0 (immediately)
Continue Every	Number of minutes before Stratagy re-attempts notification after the first notification. For example, every 60 minutes means notify this user every hour after the first notification. Possible values: 0~60 Default: 60 (minutes)
Max Times	Number of notification attempts when new messages exist in this user's mailbox. Stratagy counts only successful tries; i.e., successfully performing each action in the Method field. Possible values: 0~999 Default: 0 (Stratagy continues until the user has played every new message.)

Table 6-6 Notify Menu Screen Fields *(continued)*

Notify Features	
Title	Comment or reminder that identifies the type or purpose of this Notify record/template. For example, message light on, digital pager, home. (Field is 16 characters long.)
Type	Notification type for this record. To select the type: 1. When the cursor is in the *Type* field to display the options, press **F2**. 2. Use the arrow keys (↑↓) to highlight the type you want. 3. Press **Enter** to select the type. NORMAL: Notify user of new messages in his mailbox by lighting the message light or calling a telephone number. Notification begins when a message is left in the User ID mailbox. User notified of new messages in his mailbox by lighting the message light, calling a home telephone, calling a cellular telephone, or calling any off-premise location. Notification ends when the user picks up messages or when the maximum number of tries (Max Times) has been reached. RELAY: Notify user by relaying the caller's telephone number to the user's beeper display. Notification begins when a caller uses the relay paging feature to record a telephone number. Stratagy prompts the caller to: 1. Press **#** while connected to the personal greeting of the user's mailbox. 2. Enter his/her telephone number and press **#**. Stratagy stores the telephone number in the *Method* field token **%R**. User notified when the caller's telephone number is relayed to the user's beeper display or forwarded to a voice answered telephone. Notification ends when the maximum number of tries (Max Times) has been reached. PICKUP: Turn off a message waiting light after a user has retrieved messages from his mailbox. Notification begins after the user picks up all new messages and exits from the Play Messages selection. Notification ends when the maximum number of tries (Max Times) has been reached. Therefore, be sure to enter 1 when you define Max Times. DISK: Notify user (usually System Administrator) when available flash drive space is low. Notification begins when the available flash drive storage space reaches the predefined limit (set using the Stratagy system configuration parameter *diskwarn*). The default is 5%. Notification ends when the maximum number of tries (Max Times) has been reached. URGENT: Notify user of an urgent message in his mailbox. Notification begins when a User ID mailbox receives a message the caller marked as urgent. Notification ends when the maximum number of tries (Max Times) has been reached. PANIC: Automatically notifies the System Administrator or support personnel that an error has occurred on the system whenever an unsuccessful restart occurs during the Automatic System Recovery. Possible values: NORMAL, RELAY, PICKUP, DISK, URGENT, PANIC Default: NORMAL

Table 6-6 Notify Menu Screen Fields *(continued)*

Variable	Value Stratagy inserts in place of the **%V** in the *Method* field. Typically, this is pager or similar value associated with the record rather than the template. The uses include: • Notification templates can be used for many users. • Field personnel can be notified at different destinations during the day or week. **Important!** *Using Stratagy's User Notification option for his/her User ID mailbox, a user can enable or disable an existing Notify record and modify the contents of the record's Variable field.* Possible values: blank, telephone number, extension, Token Programming Language Default: blank
Method	Programmed dial actions Stratagy performs to notify the user. Possible values: include User ID mailbox, telephone extension, Token Programming Language Default: blank

Token Programming 7

Stratagy's Token Programming Language consists of commands, or tokens, that instruct Stratagy what actions to perform. The tokens that are generally used are simple and perform standard expected actions such as dialing an extension.

The Token Programming Language gives the system versatility. Its capabilities include, but are not limited to:

- Gathering information from callers
- Confirming digits entered by a caller
- Relaying messages to digital pagers
- Controlling message waiting lights

The Token Programming Language uses three types of tokens: singular, defined, and replaced. For a detailed description of each token, see Tables 7-1~7-3.

Using the Token Programming Language

The Token Programming Language may be used in the following fields:

Users Menu's Extension Field

Typically the Users Menu's *Extension* field contains the actual telephone station/extension number for the corresponding User ID. It may contain tokens. Or, it may be empty.

Auto's Extension Field

The default value for the Auto record's *Extension* field is the value in the User's *Extension* field. However, it may contain tokens. When the Auto record is active, Stratagy uses this *Extension* field rather than the Users Menu's *Extension* field.

Notify's Method Field

The Notify record's *Method* field must always be defined for Stratagy to perform the proper type of notification.

To program the *Extension* or *Method* fields, enter a series of commands, or tokens, that instruct Stratagy what actions to perform. A field would, therefore, contain *TokenTokenToken...Token*, where *Token* defines how to perform the actions.

Some IVR tokens are not supported by the Flash.

Stratagy provides reserved User ID mailboxes that have common features pre-programmed, including future delivery, guest defaults, and fax tone detect. Notify contains templates (e.g., message waiting light control and pagers) you can use for defining User ID Notify records.

See Chapter 8 – Customization Examples for examples on how to use the Token Programming Language.

Singular Tokens

Singular Tokens are single character commands that perform a single action that cannot be modified. For example, the token **1** performs the action of playing DTMF 1.

Table 7-1 Singular Tokens

Token	Syntax	Description
@	@	Suppress normal process—prevents Stratagy from normally processing an *Extension* or *Method* field. • Normally when Stratagy evaluates an *Extension* field, it plays the "Please hold..." prompt to the caller, puts the caller on transfer hold, and then evaluates the tokens in the field. If the first character in the field is the @ token, however, Stratagy immediately begins processing the next token without performing the transfer procedure. • In the case of the *Method* field, Stratagy does not attempt to access a port for an outbound notification call.
1	1	Plays DTMF tone 1.
2	2	Plays DTMF tone 2.
3	3	Plays DTMF tone 3.
4	4	Plays DTMF tone 4.
5	5	Plays DTMF tone 5.
6	6	Plays DTMF tone 6.
7	7	Plays DTMF tone 7.
8	8	Plays DTMF tone 8.
9	9	Plays DTMF tone 9.
0	0	Plays DTMF tone 0.
*	*	Plays DTMF tone *.
#	#	Plays DTMF tone #.
A	A	Plays DTMF tone A.
B	B	Plays DTMF tone B.
C	C	Plays DTMF tone C.
D	D	Plays DTMF tone D.
- (dash)	-	Short pause—pauses 0.5 (one-half) second.
, (comma)	,	Long pause—pauses two seconds.
~	~	Timed break recall—pulse dials the digit 1 to effect a timed break recall.
E	E	Earth recall—performs an earth recall. This is used in place of the hookflash (the **F** token) on some switches.
F	F	Hookflash—performs a hookflash. The length of the hookflash specified under the Telephone System Dial Codes option # *Number of 1/100 seconds to use for flash time*. (See Chapter 4 – Configure Stratagy.)

Table 7-1 Singular Tokens *(continued)*

Token	Syntax	Description
H	**H**	Go on hook—immediately hangs up. If entered after an extension number, performs an immediate hang-up without waiting for system tone cadences. This is called a Blind Transfer.
U	**U**	Return to transferring User ID if *Extension* field number busy—if entered after a number in the *Extension* field, performs a partially supervised transfer. If ringing is returned, the system hangs up for a blind transfer. If busy is returned, the Stratagy retrieves the call to be processed by the transferring User ID.
X	**X**	Remember event—message waiting light control—creates the file LIGHT.ON in the User ID's directory. Used with the Y and Z tokens to control Stratagy's processing of tokens, particularly in situations where Stratagy should perform an action once regardless of the number of times the tokens are attempted. A message waiting light that uses the same codes to turn on the light as it does to turn off the light; i.e., a toggle. See Chapter 8 – Customization Examples for details.
Y	**Y**	Forget event – message waiting light control—deletes the LIGHT.ON file in the User ID's directory. A message waiting light that uses a different code to turn off the light than to turn on the light. See Chapter 8 – Customization Examples for details.
Z	**Z**	Test event – message waiting light control—tests for the existence of the LIGHT.ON file in the User ID's directory. If the file is there, immediately stops processing the rest of the tokens for this User ID.

Replaced or Variable Tokens

Replaced or Variable Tokens are specified with a preceding **%** sign and cause Stratagy to replace the token given with the value associated with the token. For example, The token **%M** would be replaced with the current number of messages for the current User ID being accessed.

Table 7-2 Replaced Tokens

Token	Description
%A	Public network line access codes—replaced with the value of the Stratagy System configuration parameter *fax_dl_init* (public network line access) (Chapter 4 – Configure Stratagy) **Syntax** `%A`
%B1~%B6	Board serial number—replaced with the appropriate value that represents the serial number of the appropriate voice board. %B1 voice board 1 %B2 voice board 2 %B3 voice board 3 %B4 voice board 4 %B5 voice board 5 %B6 voice board 6 **Syntax** `%B1,%B2,%B3,%B4,%B5,%B6`
%C	Replaced with the current port number. **Syntax** `%C`
%D	Flash drive space remaining—replaced with the value that represents the percent of free flash drive space at the time it is used. **Syntax** `%D` **Example** `P(%D,N)` Says (plays) the percentage of free flash drive space as a number.
%E	*Extension* field—replaced with the contents of the current User ID's *Extension* field. **Syntax** `%E`
%F	User ID's *Directory Name 1*, *Directory Name 2*, or *Comment* field—replaced with the contents of the Users Menu's *Directory Name 1*, *Directory Name 2*, or *Comment* field for the User ID. **Syntax** `%F(n[,uid])` where: n Number representing one of the following Users Menu fields. 1 Directory Name 1 2 Directory Name 2 3 Comment uid Valid User ID. Defaults to current User ID if not specified. **Example** `%F(3)` Replaced with the contents of the Users Menu's *Comment* field for the current User ID.

Table 7-2 Replaced Tokens *(continued)*

Token	Description
%K	Value held in the Calling Party ID buffer. **Syntax** `%K`
%M	Number of messages—replaced with the total number of messages for the current User ID. **Syntax** `%M`
%N	Number of new messages—replaced with the number of new messages for the current User ID. **Syntax** `%N`
%P	Previously accessed User ID—replaced with the User ID previously accessed **Syntax** `%P` **Example** If while accessing User ID 100 a caller enters 222, then while User ID 222 is accessed %P has the value 100.
%R	Relay page DTMF—replaced with the DTMF digits entered by the caller who invoked RELAY paging notification. Used mostly for sending a telephone number directly to a User's pager/beeper from his User ID. **Syntax** `%R`
%S0~%S19	Store value—Stratagy has twenty storage tokens (variables) that enable you to input, modify, retrieve, and output values. Upon each new call, all the variables are initialized to null (no defined value). %S0 storage token 0 %S10 storage token 10 %S1 storage token 1 %S11 storage token 11 %S2 storage token 2 %S12 storage token 12 %S3 storage token 3 %S13 storage token 13 %S4 storage token 4 %S14 storage token 14 %S5 storage token 5 %S15 storage token 15 %S6 storage token 6 %S16 storage token 16 %S7 storage token 7 %S17 storage token 17 %S8 storage token 8 %S18 storage token 18 %S9 storage token 9 %S19 storage token 19 Each port has a unique set of twenty %S tokens which do not conflict. Therefore, two different ports may use the same %S token without disrupting each other's value. **Syntax** `%S0,%S1,%S2,%S3,%S4,%S5,%S6,%S7,%S8,%S9,%S10,%S11,%S12, %S13,%S14,%S15,%S16,%S17,%S18,%S19`
%T	Connect time—replaced with the current connect time, i.e., the total number of seconds that the port/call has been active. **Syntax** `%T`
%U	User ID—replaced with the current User ID number. **Syntax** `%U`

Table 7-2 Replaced Tokens *(continued)*

Token	Description
%V	Variable—replaced with the value of the current Notify record's *Variable* field. Useful for defining notification templates for User IDs that perform the same type of notification with a difference only in the telephone number that Stratagy should dial, e.g., pager/beeper telephone numbers. **Syntax** `%V`
%W	Current day of the week—replaced with the current day of the week, where: 1 Sunday 5 Thursday 2 Monday 6 Friday 3 Tuesday 7 Saturday 4 Wednesday **Syntax** `%W`
%X	Transfer hold codes—replaced with the value of the Telephone System Dial Codes that puts a caller on transfer hold (# Dial code to put a caller on transfer hold). See Chapter 4 – Configure Stratagy. **Syntax** `%X`
%Y	Current date—replaced with the current date (mmddyyyy). This is the same format used in the **P( )** token for dates. **Syntax** `%Y` **Example** `P(%Y,D)` Says the current date: month, day, year.
%Z	Current time—replaced with the current time in 24-hour format (hhmm). This is the same format used in the **P( )** token for time. **Syntax** `%Z` **Example** `P(%Z,T)` Says the current time in 24-hour format: hours, minutes.
LEN[ ]	Length—replaced with the total number of characters in the %Sn variable. **Syntax** `LEN[%Sn]` where: %Sn One of the %S storage variables (range: 0~19). **Example** `P(LEN[%S1],N)` Says the number of characters in %S1 as a number.

Defined Tokens

Defined Tokens are expressed with left and right parentheses surrounding one or more definitions that determine how the token should work. For example, the Goto token **G( )** only takes one definition. Stratagy immediately "goes to" the User ID specified for processing. For G(123), Stratagy continues processing at User ID 123.

Strings that contain a space, comma or quotes, must be enclosed with quotes (e.g., "9,%S1") or Stratagy may misread the token.

Table 7-3 Defined Tokens

Token	Description
G( )	Go to User ID—immediately continues processing at the User ID specified. Stratagy continues standard processing at the User ID per the User ID mailbox processing diagram (Chapter 5 – How Stratagy Operates). **Syntax** `G(uid)` where: uid User ID **Example** `G(299)` Goes to User ID 299.
H( )	Hang-up process—defines the specified uid as the uid that Stratagy processes when it detects a hang-up condition. This is useful for performing cleanup and/or exit routines when a caller hangs up. **Syntax** `H(uid)` where: uid Valid User ID

I( )	*If* conditional—if the relationship between the first *string* and the second *string* is true, then continue processing at the User ID specified by *uid*. Otherwise, processing continues with the next token.
	Syntax `I(string,relationship,string,uid)`
	where:
	string Any quoted set of characters, numbers, and/or variables.
	relationship Either >, <.=,! which test for greater than, less than, equal, or not equal.
	uid Valid User ID. Can be a variable.
	Examples
	`I("111",<,"222",1000)`
	Immediately continues processing at User ID 1000.
	`I("111",>,"222",1000)`
	Does not continue processing at User ID 1000 and instead continues with the next token.
	`I("%S1",=,"1234",2000)`
	Continues processing at User ID 2000 only if %S1 has the value 1234.
	`I("%S1",=,"SPANISH",2000)`
	Continues processing at User ID 2000 only if %S1 = SPANISH.

Table 7-3 Defined Tokens *(continued)*

Token	Description
KB( )	Plays a tone on the channel. **Syntax** `KB(freq,ms)` where: freq Frequency of the tone. ms Duration (in milliseconds) of the tone.
KC( )	Compare security code—the **KC( )** token compares value of sec to the security code for the User ID. If equal, processing continues with the next token. Otherwise, processing proceeds to the value defined in the *Done* chain. **Syntax** `KC(uid,sec)` where: uid Valid User ID. Can be a variable. sec Value to be compared with the security code. Can be a variable. **Example** `KC(375,23456)` Compares 23456 with the value of User ID 375's security code. If equal, processes the next token. Otherwise, proceeds to the value defined in the *Done* chain.
KD( )	Delete User ID mailbox message—deletes the message in the specified message queue from the User ID mailbox. **Syntax** `KD(msg,msgq[,uid])` where: msg Message number. Can be a variable. msgq Message queue. Can be a variable. U Urgent Message Queue N New Message Queue S Saved Message Queue uid Valid User ID. Can be a variable. Defaults to current User ID if not specified. **Example** `KD(2,U)` Deletes message number 2 in the Urgent Message Queue for the current User ID.

Table 7-3 Defined Tokens *(continued)*

Token	Description
KF	Suppresses DTMF_gate function. **Syntax** `@KFV(CALLERID.txt,field,%K,field,%Sn)G(%Sn)` where: @ Suppress normal process. KF Suppress DTMF gate function. V Searches Callerid.txt file. Callerid.txt File to be searched. field Field in Callerid.txt file that is searched for **%K** match (e.g., phone number). %K Value held in Calling Party ID buffer. field If a match to **%K** is found, this field is searched for the associated value (e.g., User ID) and the value is stored in **%Sn**. %Sn One of the **%S** storage variables (range: 0~19). G (%Sn) Goes to mailbox number stored in **%Sn**. **Example** `@KFV(CALLERID.txt,1,%K,2,%S2)G(%S2)` @ Suppress normal process KF Suppress DTMF gate. V(CALLERID.TXT,1,%K,2,%S2) Searches field 1 of the callerid.txt for a value that matches **%K**. If a match is found, Stratagy stores the value in field 2 of the callerid.txt as %S2. If no match is found, the remaining values in the token string are ignored and Stratagy executes the Done chain. G(%S2) Goes to mailbox number stored in %S2 (e.g., user ID 890).
KI( )	Position of substring in string—the **KI( )** token searches *string* for the first occurrence of *substring*. The result of the search is the position of the *substring* within the *string*, and it is stored as the variable. **Syntax** `KI(substring,string,%Sn)` where: substring Any alphanumeric substring. Can be a variable. string Any alphanumeric string. Can be a variable. %Sn One of the %S storage variables (range: 0~19). **Example** `KI("d","abcdefg",%S0)` Searches *string* "abcdefg" for the first occurrence of *substring* "d," and places the value of the position of the *substring* within the *string* in storage variable 0. The result is the %S0 variable containing 4, because "d" is the fourth character in the *string*.

Table 7-3 Defined Tokens *(continued)*

Token	Description
KL( )	Logs caller into User ID. **Note** Cannot be used in the Notify Menu. **Syntax** `KL(uid)` where: uid Valid User ID. **Example** `KL(239)` Logs the caller into User ID 239
KM	Enables a Stratagy Admin PC's modem to communicate with the IVP8 internal modem (2400). This token is factory programmed in User ID 993. **Example** `@KM`
KN( )	Access AMIS networking—the **KN( )** token enables access to AMIS networking (see Chapter 9 – AMIS Networking). **Syntax** `KN(phone[,mbx])` where: phone DTMF digits representing the telephone number to dial to connect to the AMIS network. mbx Valid mailbox on remote system or current User ID (Proxy Box). If not defined, Stratagy uses value defined when AMIS message was addressed via the Gateway Box. See Chapter 9 – AMIS Networking for details. **Example** `KN(9-1-7145555555,345)` 9 Dials for an outside line. - Pauses (0.5 second). 1 Dials 1 for long distance access. - Pauses (0.5 second). 7145555555 Dials the telephone number. 345 Dials the User ID.
KR( )	Creates a recording—if the destination is an existing User ID, Stratagy inserts the recording into that mailbox as a new message. Otherwise, the destination is assumed to be the name of an existing file and the recording is placed there. **Syntax** `KR(dest)` where: dest Destination—User ID or file (valid DOS file name). Can be a variable. **Example** `KR(532)` Inserts the recording in User ID 532 as a new message.

Table 7-3 Defined Tokens *(continued)*

Token	Description
KT( )	Directs calls to a designated User ID when DSS function is active (*dss_active* = true), the DSS port is assigned in the "answering" mailbox, and the Night Transfer on the DSS console is On. **Syntax: `KT(XXX)G(YYY)`** where: **`XXX`** Box number used when Night Transfer is On. **`YYY`** Box number used when Night Transfer is Off.
KV( )	Delete record from a database—for the *file* specified, deletes the first record with the *value* in that *field* (if any). If *file* ends with .DBF, Stratagy assumes it is in dBase format. Otherwise, Stratagy assumes it is the name of an ASCII file with columns separated by commas. **Syntax** **`KV(file,field,value)`** where: file dBase file (.DBF) or ASCII file with columns separated by commas (comma delimited). Valid DOS file name. Can be a variable. field dBase file field name or ASCII file column number. (1 is the value of the field before the comma.) Can be a variable. value Any alphanumeric string. Can contain %S variables. **Example** **`KV(xyz.dbf,client,"abc")`** For dBase file xyz.dbf, deletes the first record where the field named client contains the string "abc."
L( )	Switch system language—immediately changes the system prompts to use the specified file (usually the specified file's name indicates the language). All system prompts change, including User mode prompts. **Syntax** **`L(language_file)`** where: language_file File name in the Stratagy directory that represents a Stratagy system language file which has the DOS suffix .IDX. **Examples** **`L(ENGLISH)`** Uses the ENGLISH.IDX system prompt file in the C:\STRATAGY directory. **`L(SPANISH)`** Uses the SPANISH.IDX system prompt file in the C:\STRATAGY directory.

Table 7-3 Defined Tokens *(continued)*

Token	Description
M( )	Audiotex menu—the **M( )** token enables you to specify fast single-digit entry for audiotex menu selections. While Stratagy processes this token, it plays (or says) the specified greeting while waiting for a single DTMF digit to be pressed by the caller. When the caller presses the single DTMF digit, Stratagy looks up the menu selection that matches and continues processing at the specified User ID. Therefore, this eliminates the normal delay for determining completed DTMF entry. **Note** While this Token is active, no other digits, except the defined menu selections, is recognized. **Syntax** `M(Gn,count,delay)` where: Gn — User ID's greeting number (range: 1~7). count — Number of times to play the greeting. delay — Time (in 10ths of seconds) to wait after each saying of the greeting. **Example** `M(G1,2,20)` Plays greeting 1 up to two times with a 2 second delay after each time the greeting plays, waiting for the caller to press a DTMF. • If the caller presses 5, Stratagy immediately continues processing at the User ID specified in the *Menu* 5 field. • If the caller makes no selection, Stratagy continues processing at the next token. • If the caller makes an invalid selection, Stratagy continues processing at the *Done* chain.
N( )	Update database record—the **N( )** token enables you to update the values of a database record. It searches a file for the first record that has *s-value* in *s-field*. It updates the record by placing *n-value* in *r-field*, and then saves that record back to the database. **Syntax** `N(file,s-field,s-value,r-field,n-value[,r-field, n-value...])` where: file — dBase file (.DBF) or ASCII file with columns separated by commas (comma delimited). Valid DOS file name. Can be a variable. s-field — Search dBase file field name or ASCII file column number. (1 is the value of the field before the comma.) Can be a variable. s-value — Search alphanumeric string. Can contain %S variables. r-field — Replacement dBase file field name or ASCII file column number to update. n-value — New alphanumeric string. Can contain %S variables.

Table 7-3 Defined Tokens *(continued)*

Token	Description
N( ) *(continued)*	**Examples** Suppose an ASCII file contains a listing of dealers, available parts, and orders on those parts. You could use the **R( )** token to obtain information about how many parts the dealer wants to order and then use the **N( )** token to update the database. **`R(G1,%S1,40)`** G1 Plays greeting 1: "Please enter your dealer number." %S1 Stores the caller's entry in variable %S1. 40 Waits 4 seconds (40 ÷ 10 = 4) for DTMF after playing the greeting. **`R(G2,%S2,20)`** G2 Plays greeting 2: "Please enter the number of telephones you want to order." %S2 Stores the caller's entry in variable %S2. 20 Waits 2 seconds (20 ÷ 10 = 2) for DTMF after playing the greeting. **`R(G3,%S5,20)`** G3 Plays greeting 3: "Please enter the number of key systems you want to order." %S5 Stores the caller's entry in variable %S5. 20 Waits 2 seconds (20 ÷ 10 = 2) for DTMF after playing the greeting. **`N(ORDERS.DOC,5,%S1,9,%S2,12,%S5)`** • Searches ORDERS.DOC for the first record that has the value of %S1 in field 5. • Replaces the current value of field 9 with %S2. • Replaces the current value of field 12 with %S5. • Saves the record back to the database.
O( )	Timed on-hook—an on-hook condition for the specified amount of time. Depending upon the value of *tenths*, you can effect a flash, or even a hang-up condition. This is useful for generating an intermediate hang-up condition during token processing without terminating the actual continued token processing. **Syntax** **`O(tenths)`** where: tenths Time in tenths of seconds. **Example** **`O(60)`** Goes on-hook for 6 seconds (60 ÷ 10 = 6).

Table 7-3 Defined Tokens *(continued)*

Token	Description
P( )	Play—the P( ) token enables you to communicate information in a variety of ways to a caller or to a user when used in a Notify record's *Method* field. While Stratagy is playing, the skip (*****, **#**) and volume (**8**, **0**) keys on the telephone work. **Syntax** **P***repeat***(item)** where: repeat — Number of times to play the item. If omitted, defaults to 1. item — Each item causes Stratagy to say specific information. The items are defined as follows: where: A, string — Alphanumeric string. D — Percentage of remaining disk space. G[n, uid] — Greeting n of the current User ID or User ID uid. M[, uid] — Total number of messages and number of new messages for the current User ID or User ID *uid*. Mn[, uid] — Message *n* in the Saved Message Queue, if enabled, of the current User ID or User ID *uid*. MNn[, uid] — Message *n* in the New Message Queue of the current User ID or User ID *uid*. MSn[, uid] — Message *n* in the Saved Message Queue of the current User ID or User ID *uid*. MUn[, uid] — Message *n* in the Urgent Message Queue of the current User ID or User ID *uid*. nn,V — System prompt *nn*. R — DTMF digits entered by a caller who has invoked relay paging (used only in the Notify record *Method* field). %Sn — DTMF digits currently represented by the variable %Sn, where *n* is a number from 0 to 9. This is most effective for repeating the DTMF entered by a caller for confirmation. %Sn, N — DTMF digits currently represented by the variable %Sn, as a number where the range is assumed to be between 0 and 999 million. %Sn, D — DTMF digits currently represented by the variable %Sn, as a date, where the format is assumed to be either mmddyy (which assumes a year in the 1900s) or mmddyyyy. %Sn, T — DTMF digits currently represented by the variable %Sn, as a time of day, where the format is assumed to be hhmm. %Sn, $ — DTMF digits currently represented by the variable %Sn, as a dollar amount, where the last two digits are assumed to be cents. %Sn, F — The same as %Sn, $ except Stratagy uses francs and centimes. %Sn, P — The same as %Sn, $ except Stratagy uses pesos and centavos. U[, uid] — "Name and extension" recording for the current User ID or User ID *uid*. If there is no recording, Stratagy says the current User ID digits or User ID digits *uid*. V — Digits in the Notify record's *Variable* field. X, file — Voice file defined by *file*. **Examples** **P(G1)** Stratagy plays greeting 1 for the current User ID. This enables you to record and play any prompt. **P(06261994,D)** Stratagy says "June twenty-sixth, nineteen ninety-four." **P(06261994,$)** Stratagy says "Sixty-two thousand six hundred nineteen dollars and ninety-four cents."

Table 7-3 Defined Tokens *(continued)*

Token	Description

Q( )	Question and answer (Voice Forms)—the **Q( )** token enables you to ask a caller a series of questions and store all the caller's responses as a single message or multiple messages in the current User ID. Record each question as a greeting. Stratagy plays each question/greeting with a tone, records a response, and then plays the next question/greeting until all the specified questions/greetings have been played.
	You can ask the caller up to 20 questions. To play more than seven questions (using greetings 1 to 7 for the current User ID), use questions from other User IDs by specifying which User ID's greeting to access with a # sign followed by the *uid*. For example, G7#123 would use greeting 7 from User ID 123.
	Syntax `Q(Gn,...,E...)`
	where:
	Gn Greeting number (range: 1~7).
	E Groups the responses to the previous greetings as a single message.
	... Additional greetings or groupings.
	Examples
	`Q(G1,G2,G3,G4,G5,G6,G7,G1#9000,G2#9000)`
	Stratagy asks nine questions as recorded in the specified greetings (seven greetings from the current User ID and two greetings from User ID 9000), records nine responses, and stores the responses as one message.
	`Q(G1,G2,E,G3,E)`
	Stratagy groups the responses to greetings 1 and 2 as one message and the response to greeting 3 as a different message.

R( )	Read DTMF from a caller—the **R( )** token enables you to obtain caller information while prompting the caller with the specified recorded greeting. The token plays the greeting specified for the current User ID and enables the caller to make DTMF entry which is stored in the specified %S variable. Stratagy interrupts the greeting as soon as the caller enters the first DTMF tone. If there is no caller DTMF entry, Stratagy initializes the %S variable to empty, i.e., "". **Syntax** `R(Gn,%Sm,delay)` where: Gn Greeting number for the current User ID (range 1~7). %Sm One of the %S storage variables (range: 0~19). delay Time in tenths of seconds to wait for DTMF after playing the greeting (range: 0~99). If omitted, defaults to 0. **Example** To prompt and have a caller enter a telephone number and have Stratagy store that telephone number to be used later, you could: Record in greeting 1: "Enter your telephone number. Finish by pressing the # sign." Use `R(G1,%S6,20):` G1 Plays greeting 1. S6 Stores the caller's entry in variable %S6. 20 Waits 2 seconds (20 ÷ 10 = 2) for DTMF after playing the greeting.

Table 7-3 Defined Tokens *(continued)*

Token	Description
S( )	Serial port access—the **S( )** token gives Stratagy access to serial ports. By communicating over serial ports, Stratagy can access other computers and store and/or retrieve information from remote databases. Once an **S( )** token has been executed, the serial port is locked for exclusive access by the current User ID. The lock is removed only when Stratagy finishes executing the User ID's *Extension* field. This enables several related **S( )** tokens to be executed while the port is locked. To properly use this token, the physical serial port must have certain configuration parameters defined. These parameters are grouped together under "Serial Port Descriptions" of the Stratagy System Configuration options (Chapter 4 – Configure Stratagy). **Syntax** `S(port,S,%Sn,termination,length,timeout)` where: port — Logical serial port (1 or 2) mapped onto a physical port number by the Stratagy System Configuration parameter *serial_port1* for logical port 1 or *serial_port2* for logical port 2 (Chapter 4 – Configure Stratagy). S — String sent out on the specified port. It may contain any alphanumeric characters, %S variables, and the following special characters: \A — Attention (bell sound), or Ctrl+G \N — Newline, or Ctrl+J \R — Return, or Ctrl+M \T — Tab, or Ctrl+I \\ — Backslash, the actual \ character %Sn — One of the %S storage variables (range: 0~19), which stores any response from the serial port. If omitted, Stratagy does not wait for a response. length — Maximum number of characters to expect as input on the serial port. If the maximum number of characters is received, processing continues immediately with whatever characters that were received in the %Sn variable. If this option is omitted, it defaults to the maximum length of %Sn (128 characters). termination — List of characters that defines when Stratagy should stop reading from the serial port for storing in the specified %Sn variable. If omitted, defaults to "\N\R" as specified under "S". The terminating character, if any, is not part of %Sn. timeout — Maximum time (tenths of seconds) Stratagy waits for input on the serial port when reading into the %Sn variable. When the timeout expires, Stratagy continues processing with the next token. Whatever characters, if any, received up to that point are placed in the %Sn variable. If this option is omitted, the default is the value of the Stratagy System Configuration parameter *tmo_serial* (Chapter 4 – Configure Stratagy). **Example** `S(1,"GET INFO",%S1,"\N",80,40)` where: 1 — Logical serial port. "GET INFO" — String sent out of port by Stratagy. %S1 — Store response in %S1 variable. \N — Newline (Line feed) 80 — Maximum number of characters expected as input from serial port. 40 — Four-second time out waiting for input from serial port.

Table 7-3 Defined Tokens *(continued)*

Token	Description

V( )	Search for value—the **V( )** token searches the specified *file*, in the specified *field*, for the value given by *item*. If Stratagy finds the value, it stores the contents of the second field into variable %Sn. If Stratagy does not find the value, the token terminates and returns to the *Done* state.
	If *file* ends with .DBF, Stratagy assumes it is in dBase format. Stratagy assumes field names instead of field numbers and invokes dBase file processing (including record locking, if specified). Otherwise, Stratagy assumes that it is the name of an ASCII file with columns separated by commas.
	There may be several pairs of *fields* and %Sn values, and Stratagy retrieves them.
	
	Syntax `V(file,field,item,field,%Sn[,field,%Sn...])`
	
	where:
	file — dBase file (.DBF) or ASCII file with columns separated by commas (comma delimited). Valid DOS file name. Can be a variable.
	field — dBase file field name or ASCII file column number. (1 is the value of the field before the comma.) Can be a variable.
	item — An alphanumeric string. Can contain %S variables.
	%Sn — One of the %S storage variables (range: 0~19).
	
	Examples
	A caller enters his customer number to hear his credit line:
	
	`@R(G1,%S1,20)`
	G1 — Plays greeting 1: “Please enter your customer number.”
	%S1 — Stores the caller’s entry in variable %S1.
	20 — Waits 2 seconds (20 ÷ 10 = 2) for DTMF after playing the greeting.
	
	`@V(credit.doc,1,%S1,2,%S2)`
	• Searches CREDIT.DOC for customer number %S1 in field 1.
	• Stores the contents of field 2 in variable %S2.
	
	`P(G2)P(%S2,$)`
	P(G2) — Plays Greeting 2: “Your credit line is ”
	P(%S2,$) — Says the value stored in %S2 as a dollar amount: “five thousand dollars.”

Table 7-3 Defined Tokens *(continued)*

Token	Description

W( )	Wait (pause) for event—general wait token that enables Stratagy to wait for confirmation of specific events. It is useful for confirming dial tone and for notification to confirm that the appropriate answer has occurred. If the event does not occur, Stratagy terminates all remaining token processing.
	
	Syntax `W(n)`
	`W(n,P)`
	`W(n,V)`
	`W(n,T)`
	
	where:
	n Wait (pause) for *n* tenths of a second.
	n, P Wait up to *n* rings for a pager/beeper to answer.
	n, V Wait up to *n* rings for a voice to answer.
	n, T Wait up to *n* seconds to hear a dial tone.
	
	Example `W(3,P)`
	Waits up to 3 rings for a paging/beeping system to answer. You can use this to confirm that the paging company answered before playing DTMF to the paging company for pager notification of messages.

X( )	Creates a zero length file called file. **Syntax** `X(file)` where: file Valid DOS file name. **Example** `X(NEW.TXT)` Creates zero length file NEW.TXT.
Y( )	Deletes file. **Syntax** `Y(file)` where: file Valid DOS file name. Can be a variable. **Example** `Y(OLD.TXT)` Deletes the file OLD.TXT.
Z( )	Execute Done chain User ID—checks for the existence of file. If the file exists, Stratagy executes the *Done* chain User ID. If the file does not exist, the system processes additional tokens. **Syntax** `Z(file)` where: file Valid DOS file name. Can be a variable. **Example** `Z(CHECK.TXT)` Stratagy checks if the file CHECK.TXT exists. If the file exists, Stratagy executes the RNA chain User ID.

Table 7-3 Defined Tokens *(continued)*

Token	Description
+( )	Addition—enables you to perform modifications to values for calculation and control. Ideal for controlling limits and loops. **Syntax** `+(%Sn[,item])` where: %Sn One of the %S storage variables (range: 0~19). item Positive or negative value or another %S variable. Defaults to 1 if not specified.

=( )	Equate—gives the specified storage variable the value specified. The value may be a string or a numeric and should be quoted. The four-option syntax enables substring assignments.
	
	Syntax `=(%Sn,item)`
	`=(%Sn,item,start,end)`
	where:
	%Sn One of the %S storage variables (range: 0~19).
	item Any alphanumeric string. Can contain %S variables.
	start Starting character position for assigning a portion of item.
	end Ending character position to assign when used with start.
	
	Examples
	
	`=(%S1,"FRENCH")`
	Gives %S1 the value of “FRENCH”.
	
	`=(%S1,"FRENCH",3,5)`
	Gives %S1 the value of ENC (E is the start character and C is the end character).
	
	`=(%S1,%S2,1,3)`
	where %S2 = 7530414. Extracts prefix of the telephone number in %S2 (the first through third number) and gives %S1 the value of 753.

¦( )	Append variables to file—writes all twenty %S variables (%S0~%S19) to the specified file. If the file already exists, the variable values are appended to the file; otherwise, the file is created. The values are separated by commas and terminated by a new line. **Note** Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. The **¦( )** token is supported by IVP8. **Syntax** `¦(file)` where: file Valid DOS file name.

Table 7-3 Defined Tokens *(continued)*

Token	Description
[( )	Read %S variables state—reads the values of all twenty %S variables (%S0~%S19) from the specified file. The format expected is a one line, comma delimited, ASCII file where the first value is %S0, the second is %S1, etc. When the **[( )** token is used with the **]( )** token, you can read, modify, and write (remember) %S variables. **Notes** • *Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT.* • *To avoid potential simultaneous access errors: within the same User ID, if you read with the* **[( )** *token, write with the* **]( )** *token.* **Syntax** `[(file)` where: file ASCII file with columns separated by commas (comma delimited). Valid DOS file name. Can be a variable.
]( )	Write %S variables state—writes the values of all twenty %S variables (%S0~%S19) to the specified file. Typically, you would use this with the **[( )** token which reads the %S variables. **Notes** • *Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT.* • *To avoid potential simultaneous access errors: within the same User ID, if you read with the* **[( )** *token, write with the* **]( )** *token.* **Syntax** `](file)` where: file ASCII file with columns separated by commas (comma delimited). Valid DOS file name. Can be a variable.
^( )	Change port volume—changes the volume of the current port to the specified level. **Notes** • The Stratagy system configuration *gain_norm* parameter sets the starting volume for all ports (Chapter 4 – Configure Stratagy*).* • For the user, the current port volume can be set through the Users Menu's *Message Volume* field and by the user with the Play Message Controls (Chapter 6 – Menus). **Syntax** `(n)` where: n Volume of current port (range: -8~8). -8 is the softest 0 is the default initial volume 8 is the loudest.

Customization Examples 8

Using Stratagy, you can customize User IDs to record messages from callers, provide information to callers, or direct the flow of a call. With this type of flexibility, you can define virtually any call handling method.

Stratagy provides reserved User ID mailboxes that have common features pre-programmed, including future delivery and guest defaults. Notify contains templates (e.g., message waiting light control and pagers) you can use for defining User ID Notify records.

This chapter provides examples, grouped by menu (i.e., Users, Notify, Auto), of some of Stratagy's capabilities. Each example provides detailed information, including the programming and how it works. For examples that use the Token Programming Language, each token is defined.

Note See Chapter 7 – Token Programming for complete details about the Token programming language.

Some IVR tokens are not available for the Flash.

Users Menu Examples

The following examples are included in this section:

Using a Status User ID to Check Message Count for Multiple User IDs

The creation of the status User ID involves using an optional argument.

Suppose that one person owns several User IDs that he/she has given out to different classes of callers (personal friends one number, business clients another, etc.). This person would like to be able to call in to check if any of these User IDs have messages waiting for him without having to access each User ID in turn.

The token string **P(Gn)** plays greeting *n* for the current User ID or **P(M)** plays the total number of messages and number of new messages for the current User ID. This is normally what you want.

However, the **P( )** token takes an optional second argument, which in some cases indicates another User ID whose information is to be played. Using this feature, you can create a status User ID that tells the number of messages waiting in several other User IDs.

Program Example

In the following example:

- Message User IDs: 1000, 2000, 3000
- Status User ID: 9999

➤ **To program the example**

For User ID 9999, define the user's record to contain:

Extension	**@P(U,1000)P(M,1000)P(U,2000)P(M,2000)P(U,3000)P(M,3000)**
@	Suppress normal process
P(U,1000)	Plays the name recording for User ID 1000. If no recording exists, says the User ID number.
P(M,1000)	Says the total number of messages and number of new messages for User ID 1000.
P(U,2000)	Plays the name recording for User ID 2000. If no recording exists, says the User ID number.
P(M,2000)	Says the total number of messages and number of new messages for User ID 2000.
P(U,3000)	Plays the name recording for User ID 3000. If no recording exists, says the User ID number.
P(M,3000)	Says the total number of messages and number of new messages for User ID 3000.

How It Works

For each of the three User IDs, the name recording associated with the User ID plays, followed by the total number of messages and number of new messages waiting for that User ID.

System Paging a User for Special Callers

Perhaps you would like to create a special User ID for family, friends, or special customers that would:

1. When accessed, page you over the telephone paging system in your office.
2. Let you know that you have an important call.
3. Transfer that call to your extension through a "back door," even though your regular extension User ID may be in Do Not Disturb mode.

You would program Stratagy to:

1. Dial the telephone system's paging access code.
2. Say something like "There is an important call for David.''
3. Transfer the caller to a back door User ID.

Program Example

In the following example:

- Telephone system's paging access code: 33*
- Special User ID: 5222
- Back door User ID: 6222
- System code to return to a caller placed on transfer hold: F-

➤ **To program the example**

1. Customize User ID 5222 by defining the Users record and recording the greeting.
2. Define the user's record to contain:

Extension	`@F-33*P(G1)G(6222)`
@	Suppresses normal process.
F-	Performs a hookflash and pauses 0.5 second. (Some telephone systems require F-F to return to a caller placed on transfer hold.)
33*	Telephone system's paging access code. (The code varies depending upon the telephone system.)
P(G1)	Plays greeting 1 for this User ID.
G(6222)	Goes to the User ID 6222.

3. Access the User ID mailbox via telephone. Record:

   Greeting 1: "There is an important call for David.''

How It Works

When Stratagy tries to transfer a caller that has entered User ID mailbox 5222, it:

1. Places the caller on transfer hold.
2. Dials the telephone system paging code.
3. Plays greeting 1.
4. Performs a hookflash to return to the caller.
5. Continues processing at User ID 6222, which should be configured to ring an extension that may be answered by the user.

System Paging for Ring No Answer

Stratagy can call a user's extension and then, after receiving a Ring No Answer, give the caller the option to page the user through the office paging speakers. Stratagy can then transfer the caller to an extension where the call can be picked up by the user using Direct Call Pick Up.

The following example illustrates one way to do this on a Strata DK424, using a phantom standard station port as a park zone.

Program Example

In the following example:

- User ID 5: Page Party User ID.
- User ID 500: Call Park Station User ID.
- User ID 501: Back to Original Extension User ID.
- Call pickup code: #5#5
- Telephone number to pick up call: 240

➤ **To program the example**

1. For User ID 5 (Page Party), define the user's record to contain:

Extension	**@=(%S0,%P)F-#30-P(U,%P)P(G1)F,G(500)**
@	Suppresses normal process.
=(%S0,%P)	Remembers previous User ID mailbox, and stores it in %S0.
F-	Performs a hookflash and pauses 0.5 second.
#30	Dials #30 to page.
-	Pauses 0.5 second.
P(U,%P)	Plays user name recording from previous User ID mailbox.
P(G1)	Plays greeting 1.
F,	Performs a hookflash and pauses 2 seconds.
G(500)	Goes to User ID 500 (to perform the supervised transfer).
Do Not Disturb	Off

2. Access the User ID mailbox via telephone. Record:

   Greeting 1: "...has a call holding. To pickup, dial #5240."

3. For User ID 500 (Call Park Station), define the user's record to contain:

Extension	**240** (The standard station port to transfer to for pickup.)
Maximum Rings	9
Do Not Disturb	Off
Store Messages	No
RNA Chain	501
Busy Chain	501

4. For User ID 501 (Back To Original Extension), define the user's record to contain:

Extension	@G(%S0)
@	Suppresses normal process.
G(%S0)	Goes to the User ID stored in %S0.

How It Works

The user's greeting says "... leave a message after the tone, or to page me press 5..." If the caller presses **5**, he/she is routed to User ID 5.

User ID 5 does the following:

1. Remembers the previous User ID mailbox and stores the number in **%S0**.
2. Dials #30 to page.
3. Plays the previous User ID mailbox's name recording.
4. Plays greeting 1.
5. Goes to User ID 500 to perform the supervised transfer.
6. User ID 500 calls the standard station port that acts as a park zone. On a Ring No Answer, Stratagy flashes the caller back, then goes to User ID 501 via the *RNA* chain.
7. User ID 501 goes to the User ID stored in **%S0**. This sends the caller back to the original User ID.
8. Stratagy performs a hookflash and calls the original station again before taking a message.

Second User ID

There is no simple way to directly take a message without calling a second time. In order to do that a second User ID must be created for each station using this feature.

Each of these new User ID's have:

Do Not Disturb	On
Store Messages	No
Copy Message To	<original mailbox>

To make matters more complex, the user needs to record a greeting in both mailboxes. If you do this, the original User ID stored in **%S0** could be translated to the message mailbox User ID with the following tokens:

Extension	@=(%S1,%S0,2,3)G(7%S1)
@	Suppresses normal process.
=(%S1,%S0,2,3)	Assigns characters 2~3 of %S0 to %S1. For example, if the User ID is "234", %S1 equals "34"
G(7%S1)	Goes to User ID 734. (Go to the User ID mailbox with the first number of 7 and the value of %S1 (34) combined.)

Every User ID using this feature would be required to have a corresponding message taking User ID, with a first digit of 7. In this example, the User ID mailbox 734 would be programmed as follows:

Do Not Disturb	On
Store Messages	No
Copy Messages To	234

Switching and Maintaining Languages (IVP8)

Stratagy can support multiple languages simultaneously on any set of ports. The only requirements are that you install an alternative language and configure the User IDs to enable a caller to change to the alternate language. Additionally, you can control which User IDs a caller has access to when selecting a specific language.

When Stratagy answers a call, processing begins at the Company Greeting User ID (default is User ID 990). After playing the greeting, processing continues (by default) with the Caller Instructions User ID (default is User ID 991), which plays the caller instructions. During either the Company Greeting or Caller Instructions, you can give the caller the option to press a digit to hear the instructions in a different language. When the caller enters the digit, Stratagy accesses another User ID that contains the instructions in the proper language.

In order for callers to always access the proper language Caller Instructions User ID, you can program Stratagy to perform the following:

1. If French is selected, remember the language selected.
2. Before playing the default Caller Instructions User ID (991), determine which language Caller Instructions User ID should play.

Program Example

In the following example:

- The foreign language is French, and the French system prompts are in a file called FRENCH.IDX in the C:\STRATAGY directory.
- User ID 990: Company Greeting User ID (default); English and contains the choice to select French
- User ID 991: default Caller Instructions User ID (English)
- User ID 980: assigns French as the language selected
- User ID 981: French Caller Instructions User ID
- User ID 992: determines which language Caller Instructions User ID should play

➤ **To program the example**

1. For Greeting User ID 990, define the User's record to contain:

   Menu 1: 980 (if the caller selects 1, Stratagy transfers the caller to User ID 980)

   Done Chain: 991 (default)

2. Access the User ID mailbox via telephone. Record:

   Greeting 1: "Thank you for calling our company. For English please stay on the line. [In French] "For French, please press 1 now."

3. For Caller Instructions User ID 991, access the User ID mailbox via telephone. Record:

Greeting 1: “To reach the person you are calling, enter his extension. For information...”

4. For User ID 980, define the user’s record to contain:

Extension	**@L(FRENCH)=(%S1,”FRENCH”)G(981)**
@	Suppresses normal process.
L(FRENCH)	Switches the system prompts to the file FRENCH.IDX in the C:\STRATAGY directory.
=(%S1,”FRENCH”)	Assigns %S1 the value of “FRENCH”.
G(981)	Goes to User ID 981.

5. For Greeting User ID 981, access the User ID mailbox via telephone. Record:

   Greeting 1: [In French] “To reach the person you are calling, enter his extension. For information...”

6. For User ID 992, Define the user’s record to contain:

Extension	**@I(%S1,=,”FRENCH”,981)G(991)**
@	Suppresses normal process.
I(%S1,=,”FRENCH”,981)	If %S1 equals “FRENCH”, go to User ID 981.
G(991)	Goes to User ID 991.

How It Works

The customization controls Stratagy’s standard processing by keeping the caller connected to the correct language Instruction User ID. This works because whenever a new call is answered, Stratagy initializes the **%S** tokens to ”” (empty string). Therefore, if the caller never presses 1 for French, the **%S1** is never set to the value ”FRENCH” and control continues automatically from User ID 991 to User ID 992.

Figure 8-1 shows how switching and maintaining languages works for this example. When Stratagy answers the call, Company Greeting User ID 990 plays and offers the caller the choice of selecting French.

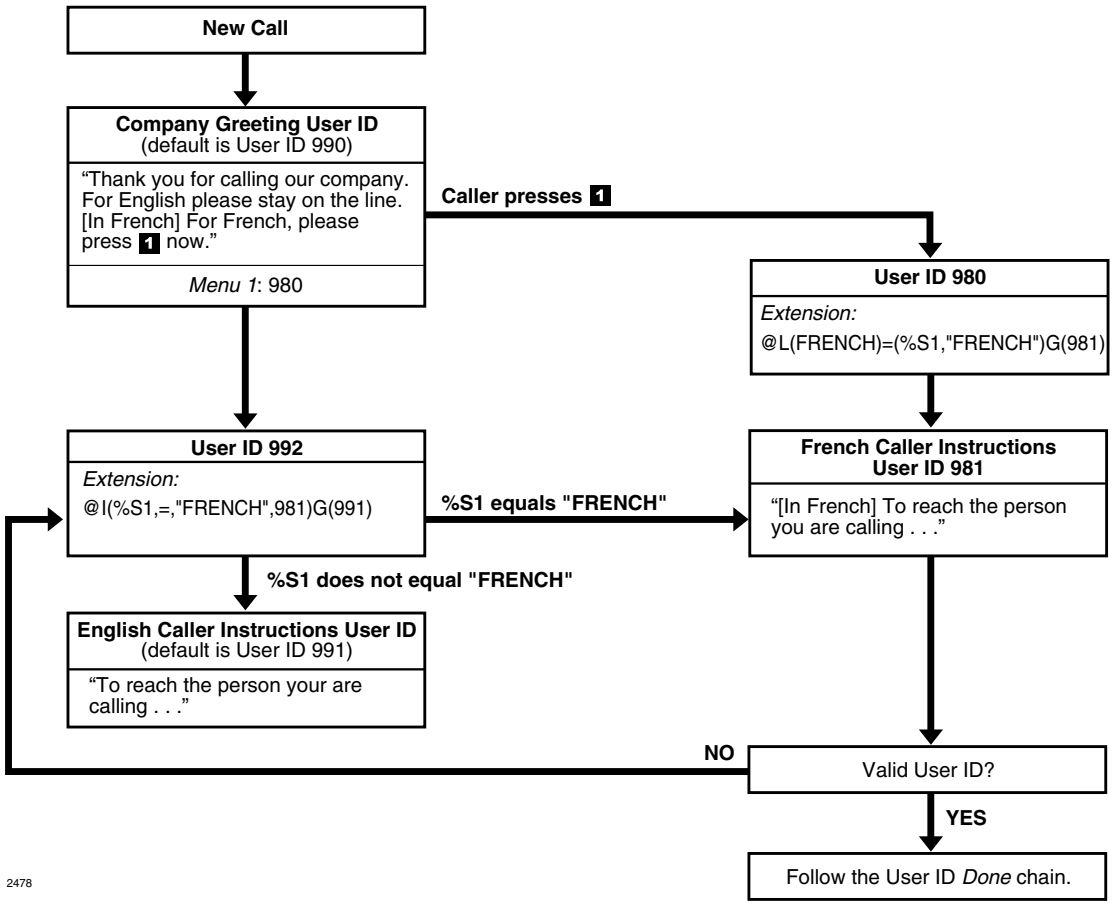


Figure 8-1 Switching and Maintaining Languages

If the caller does not select French:

1. Stratagy processes User ID 992 which determines that French is not being used (%S1 does not have the value "FRENCH").
2. Stratagy plays the English Caller Instructions User ID 991.

If the caller selects French:

1. Stratagy processes User ID 980, which assigns %S1 the value "FRENCH".
2. Stratagy plays the French Caller Instructions User ID 981.
3. Stratagy determines if the User ID is valid.
4. If valid, Stratagy follows the User ID's Done chain. If invalid, Stratagy processes User ID 992 which determines that French is being used (%S1 has the value "FRENCH"). Stratagy then processes the French Caller Instructions User ID 981.

Order Shipment Information

This example illustrates how you can interact with data files to retrieve useful information that Stratagy gives to callers by request. Stratagy does the following:

1. Asks the caller to enter an order number.
2. Determines whether the order has shipped. For example, by requesting it from another host computer (using the serial port access **S( )** token), accessing a file on Stratagy's flash drive, or accessing a file on a network server.
3. If the order has not shipped, tells the caller. Otherwise, tells the caller the date the order was shipped.

Program Example

In the followings example, Stratagy system's flash drive contains the following files:

- SHIPPED: An ASCII text file with order numbers that have been shipped. One order number per line. For example:

  11111
  22222
  33333
  12345

- SHIPDATE: An ASCII text file where each line contains an order number and its ship date separated by a comma. One per line. For example:

  11111,06301999
  22222,070111999
  33333,07061999
  12345,07121999

➤ **To program the example**

1. For User ID 2000, define the user's record to contain:

Extension	**@R(G1,%S1,20)I(LEN[%S1],!,5,2001)G(2002)**
@	Suppresses normal process.
R(G1,%S1,20)	Plays greeting 1. Waits for the caller to enter a telephone number. Reads the DTMF the caller entered into variable %S1. Waits (20/10 = 2) seconds for DTMF.
I(LEN[%S1],!,5,2001)	If the length of variable %S1 does not equal 5, goes to User ID 2001.
G(2002)	Goes to User ID 2002.

2. Access the User ID mailbox via telephone. Record:

   Greeting 1: "Please enter the five-digit order number now."

3. For User ID 2001, access User Mode via telephone. Record:

   Greeting 1: "Your order number must be five digits. Good-bye."

4. For User ID 2002, define the user's record to contain:

Extension	@?(%S1,SHIPPED,2003)P(G1)
@	Suppresses normal process.
?(%S1,SHIPPED,2003)	If variable %S1 exists in file shipped, goes to User ID 2003.
P(G1)	Plays greeting 1.

5. Access the User ID mailbox via telephone. Record:

   Greeting 1: "Sorry, but your order has not yet shipped. Please call back tomorrow."

6. For User ID 2003, define the user's record to contain:

Extension	@V(SHIPDATE,1,%S1,2,%S2)P(G1)P(%S2,D)
@	Suppresses normal process.
V(SHIPDATE,1,%S1,2,%S2)	In file SHIPDATE, searches field 1 for variable %S1. Stores field 2 in variable %S2.
P(G1)	Plays greeting 1.
P(%S2,D)	Plays the DTMF digits represented by the variable %S2 as a date.

7. Access the User ID mailbox via telephone. Record:

   Greeting 1: "Your order was shipped on."

How It Works

The order shipment example works as follows.

1. Stratagy asks the caller to enter the order number.
2. Stratagy determines if the order number is five digits long.

   If five digits long, Stratagy continues.

   If not, Stratagy plays "Your order number must be five digits. Good-bye."
3. Stratagy determines if the order number has shipped.

   If shipped, Stratagy plays "Your order was shipped on" and the date of shipment.

   If not, Stratagy plays "Sorry, but your order has not yet shipped. Please call back tomorrow."

   For example, if the caller entered order number 12345, Stratagy would play "Your order was shipped on July twelfth, nineteen ninety-nine."

Holiday Greetings—Holiday Divert Mailbox

With only 10 Auto Scheduling entries per User ID, it can be difficult to make both the daily schedules (morning, afternoon, night, weekend) and the holiday schedules work in one mailbox. The following is an alternative method—using a Holiday Divert mailbox to search a list of holidays for the year and divert to a Holiday Greeting mailbox.

Program Example

In the following example:

- User ID 900: Holiday Divert
- User ID 900 sends the call to User ID 980 if it is a holiday; otherwise, the call is routed to User ID 900's RNA chain for normal call processing.
- User ID 980: Holiday Greeting
- Greeting 2 plays: "Toshiba is closed for the holiday..."
- DOS text file HOLIDAYS.TXT lists all holiday dates.
- Stratagy System Configuration's per Port Definitions *box_grt* parameter is configured to start at User ID 900 for all valid ports.

➤ **To program the example**

1. For User ID 900 (Holiday Divert), define the user's record to contain:

Extension	**`@?(%Y,HOLIDAYS.TXT,980)`**
@	Suppresses normal process.
?(%Y,HOLIDAYS.TXT,980)	In file HOLIDAYS.TXT, search for the current date (%y). If found, goes to User ID 980.
Done Chain	991
RNA Chain	990

2. For User ID 980 (Holiday Greeting), define the Users record to contain:
   - Do Not Disturb: On (unless using a Menu token)
   - *Greeting*: 2
3. Access the User ID mailbox via telephone. Record a generic holiday greeting:

   Greeting 2: "Toshiba is closed for the holiday..."

➤ **To create the DOS text file**

You can use this method to update HOLIDAYS.TXT without shutting down the system.

1. On the Stratagy Admin PC, use DOS Edit to create the DOS text file HOLIDAYS.TXT. Enter the holidays for the year (or the next ten years if you prefer) in the following format: mmddyyyy. One date per line. For example:

   02201998
   04141998
   05291998
   07041998
   09041998
   11241998
   12251998
   01011999

2. Save as **`HOLIDAYS.TXT`**
3. Connect to the Stratagy system with Stratagy Admin.
4. From the Main Menu, press **`Alt`**+**`T`** to select the Tools option.
5. Select Filecopy form the Tools Menu.
6. In the *Source System* field (where the file currently resides), press **`F2`** to display a pop-up box of selections. Highlight PC and press **`Enter`**.
7. In the *Copy From:* field, type the directory and file names (e.g., **`C:\VSA32\ABCCOMP\HOLIDAYS.TXT`**).
8. In the *Copy To:* field, type **`HOLIDAYS.TXT`** and press **`Enter`**. The file copies to the Stratagy system's drive (drive C:).

➤ **To configure the Stratagy System**

➤ Use the Stratagy System Configuration option of the Stratagy Configuration Utility to modify the Per Port Definition *box_grt*. See Chapter 4 – Configure Stratagy for detailed information. The following lines correspond to the number of ports installed on your system. In the example below, ports 1~4 start at User ID 900.

set box_grt 900 1
set box_grt 900 2
set box_grt 900 3
set box_grt 900 4

How It Works

When a call rings in, Stratagy routes it to User ID 900 instead of User ID 990. The token string in User ID 900 checks HOLIDAYS.TXT for today's date. If it finds a match, the call is sent to User ID 980. Otherwise, the call is routed to the *RNA* chain (User ID 990) for normal call processing. User ID 980 acts as the generic holiday mailbox, having a greeting like "Toshiba is closed for the holiday..." User ID 980 could also have its own Auto schedule that changes the greeting each holiday season.

Transferring a Caller Directly to a Mailbox

Without customizing Stratagy or the telephone system, the procedure an Operator uses to transfer a caller to a user's personal greeting involves dialing:

```
<Stratagy pilot voice mail number> + 998# + <User ID> + #
```

Note User ID 998 (Direct Message) is the reserved User ID that enables Stratagy to record a message for a User ID without executing the Extension field or hear the User ID's greeting. See Chapter 5 – How Stratagy Operates for more information.

You can customize Stratagy and the telephone system so that when the Operator presses a DSS key, Stratagy plays "Enter the destination User ID." The Operator dials the User ID, and Stratagy plays its greeting. The example below illustrates this using Stratagy and the Strata DK.

Program Example

In the following example:

- User ID 800: User ID assigned to standard station port
- User ID 998: Direct Message (default)
- User ID 800 chains to User ID 998

➤ To program the example

➤ For User ID 800, set the *Chain RNA* field to 998.

➤ To program the telephone system

1. Program a DSS key that rings a spare standard station port.
2. Call forward the standard station port to voice mail.
3. Enter the voice mail ID digits for this station under #656, matching the new User ID (91 800 in this example).

How It Works

When the Operator presses the DSS key for the standard station port, the call forwards to voice mail. When Stratagy answers, the telephone system sends it the digits 91 800, routing the call to User ID 800. Stratagy handles a DTMF packet preceded by "91" as a Ring No Answer call, so it immediately jumps to the *RNA* chain (User ID 998; Direct Message). Now the Operator can dial the User ID and receive his/her greeting without the auto attendant attempting to transfer the call.

Notify Menu Examples

The following examples are included in this section:

Message Waiting Light Control When Light On and Off Codes Differ

Some telephone systems support message waiting lights that can be controlled by special sequence keys. The following method works if the telephone system uses different codes to turn on and off the message waiting light.

Program Example

In the following example:

- Code for turning on the message waiting light: #63
- Code for turning off the message waiting light: #64

➤ **To program the example**

1. For turning on the light, define the Notify record to contain:

Title	<enter title/comment for identification>
Type	NORMAL
Method	**`W(5,T)#63%E`**
W(5,T)	Wait five seconds for dial tone before sending #63%E.
#63	Turns on the message waiting light. (The code varies depending upon the telephone system.)
%E	Dials the DTMF digits given in the User ID's *Extension* field.

2. For turning off the light, define the Notify record to contain:

Title	<enter title/comment for identification>
Type	PICKUP
Method	**`W(5,T)#64%E`**
W(5,T)	Wait five seconds for dial tone before sending #64%E.
#64	Turns off the message waiting light. (The code varies depending upon the telephone system.)
%E	Dials the DTMF digits given in the User ID's *Extension* field.

How It Works

If your telephone system uses different codes for turning on and off the message light, Stratagy:

1. Turns on the light at the extension defined by the User ID's *Extension* field.
2. Turns off the light at the extension defined by the User ID's *Extension* field.

Message Waiting Light Control When Light On and Off Codes Are the Same

If your telephone switch uses the same code to turn on the message waiting light as it does to turn it off (i.e., toggles the light using a single code), then the method above will not work as you might expect. This is because every time a new message is saved, Stratagy performs the light on code regardless of whether the light was already on. Therefore, for the first new message, Stratagy turns the light on, but on the second new message, if the user has not picked up the first new message, Stratagy turns the light off since it was already on!

To solve this problem, do the following:

➤ **To turn on the light**

1. Check if you have already turned on the light (Z). If you haven't continue to Step 2.
2. Turn on the light and remember that you have turned it on (X).

➤ **To turn off the light**

➤ Turn off the light and forget that you had turned it on (Y).

Program Example

In the following example—Code for turning on/off the message waiting light: #60

➤ **To program the example**

1. For turning on the light, define the Notify record to contain:

Title	<enter title/comment for identification>
Type	NORMAL
Method	**`Z#60%EX`**
Z	Tests for existence of LIGHT.ON file in the User ID's directory. If it exists, Stratagy stops processing the string.
#60	Turns on/off the message waiting light. (The code varies depending upon the telephone system.)
%E	Dials the DTMF digits given in the User ID's *Extension* field.
X	Creates the LIGHT.ON. file in the User ID's directory.

2. For turning off the light, define the Notify record to contain:

Title	<enter title/comment for identification>
Type	PICKUP
Method	**`#60%EY`**
#60	Turns on/off the message waiting light. (The code varies depending upon the telephone system.)
%E	Dials the DTMF digits given in the User ID's *Extension* field.
Y	Deletes the LIGHT.ON file in the User ID's directory.

How It Works

When Stratagy turns on the message light, it:

1. Checks if the light is already turned on (if the LIGHT.ON file exists in the User ID's directory). If it exists, Stratagy stops processing the *Method* field.
2. Turns on the light at the extension defined by the User ID's *Extension* field.

When Stratagy turns off the message light, it:

1. Turns off the light at the extension defined by the User ID's *Extension* field.
2. Deletes the LIGHT.ON file in the User ID's directory.

Voice Notification

You can program Stratagy to notify a user via voice. Voice notification is commonly used in lieu of message waiting lights.

In the example below, assume you want Stratagy to notify a user of the number of new messages in his mailbox.

Program Example

In the following example:

- User ID: 405
- "name recording": Ken
- Number of new messages in User ID mailbox 405: 3

➤ **To program the example**

Define the Notify record to contain:

Title	<enter title/comment for identification>
Type	NORMAL
Method	**`%EW(3,V)P(U)P(M)`**
%E	Dials the DTMF digits given in the User ID's *Extension* field. This should be the user's telephone number.
W(3,V)	Waits up to 3 rings for a voice to answer.
P(U)	Plays the name recording for the current User ID. If there is no recording, says the User digits.
P(M)	Plays the total number of messages and number of new messages for the current User ID.

How It Works

Per the notification schedule, Stratagy:

1. Dials the user's telephone number.
2. Waits for a voice to answer.
3. Says the user's recorded name: "Ken."
4. Says the user's total number of messages and number of new messages: "3."

Notification to a Pager

You can program Stratagy to notify a user via his digital pager.

In the example below, assume you want Stratagy to notify the user of the total number of messages and the number of new messages in his User ID mailbox.

Program Example

In the following example:

- Dial 9 for an outside line
- The paging system uses the * to designate a "-" in the pager display
- User ID: 405
- Total number of messages in User ID 405: 5
- Number of new messages in User ID 405: 3

➤ To program the example

Define the Notify record to contain:

Title	<enter title/comment for identification>
Type	NORMAL
Variable	<digital pager's telephone number>
Method	`9W(4,T)%V,,W(2,P)-%U*%M*%N#-`
9	Dials 9 for an outside line.
W(4,T)	Waits up to 4 seconds to hear dial tone.
%V	Dials the contents of the Notify record's *Variable* field. This should be the digital pager's telephone number.
,,	Pauses 4 seconds (2 seconds x 2).
W(2,P)	Waits up to 2 rings for the pager/beeper to answer.
-	Pauses 0.5 second to enable the pager's answer confirmation tones.
%U	Relays the User ID.
*	Dials **✱**. (Used by many paging systems to designate a "-" in the pager display.)
%M	Relays the total number of messages in this User ID mailbox.
*	Dials **✱**. (Used by many paging systems to designate a "-" in the pager display.)
%N	Relays the number of new messages in this User ID mailbox.
#	Dials **#** to end call.
-	Pauses 0.5 second.

How It Works

Per the notification schedule, Stratagy:

1. Dials the user's digital pager's telephone number.
2. When the pager answers:
   - Relays the User ID.
   - Relays the total number of messages.
   - Relays the number of new messages.

For this example, the following displays on the pager: 405-5-3.

Notification to a Pager on Urgent Messages Only

You can program Stratagy to light a message waiting light for all messages, while paging or calling the user offsite when he receives a message marked Urgent. To do this, for the particular paging Notify record, change the *Type* field from **`Normal`** to **`Urgent`**.

To program Stratagy to notify a user via his digital pager when he receives a message marked Urgent is similar to "Notification to a Pager." To program Stratagy to light the message waiting light for all messages, see "Message Waiting Light Control When Light On and Off Codes Differ" on page 8-14 or "Message Waiting Light Control When Light On and Off Codes Are the Same" on page 8-15.

Program Example

In the following example:

- User ID: 405
- Dial 9 for an outside line
- The paging system uses the * to designate a "-" in the pager display

➤ **To program the example**

Define the Notify record to contain:

Title	<enter title/comment for identification>
Type	URGENT
Variable	<digital pager's telephone number>
Method	**`9W(4,T)%V,,W(2,P)-%U#-`**
9	Dials 9 for an outside line.
W(4,T)	Waits up to 4 seconds to hear dial tone.
%V	Dials the contents of the Notify record's *Variable* field. This should be the digital pager's telephone number.
,,	Pauses 4 seconds (2 seconds x 2).
W(2,P)	Waits up to 2 rings for the pager/beeper to answer.
-	Pauses 0.5 second to enable the pager's answer confirmation tones.
%U	Relays the User ID.
#	Dials # to end call.
-	Pauses 0.5 second.

How It Works

When Stratagy receives an Urgent call for this User ID, Stratagy:

1. Dials the user's digital pager's telephone number.
2. When the pager answers, Stratagy relays the User ID.

For this example, the following displays on the pager: 405.

Relay Paging to a Pager

With relay paging, the caller enters his/her number on the telephone dial pad and Stratagy notifies the user by relaying the caller's telephone number to the user's pager display. A caller can page without redialing, or even knowing, the user's pager number.

Program Example

In the following example:

- Dial 9 for an outside line
- The paging system uses the * to designate a "-" in the pager display
- User ID: 2765
- Caller's telephone number: 583-3700
- To activate relay paging, the caller presses # when the User ID's greeting plays

➤ **To program the example**

Define the Notify record to contain:

Title	<enter title/comment for identification>
Type	RELAY
Variable	<digital pager's telephone number>
Method	`9W(4,T)%V,,W(2,P)-%U*%R#-`
9	Dials 9 for an outside line.
W(4,T)	Waits up to 4 seconds to hear dial tone.
%V	Dials the contents of the Notify record's *Variable* field. This should be the digital pager's telephone number.
,,	Pauses 4 seconds (2 seconds x 2).
W(2,P)	Waits up to 2 rings for the pager/beeper to answer.
-	Pauses 0.5 second to enable the pager's answer confirmation tones.
%U	Relays the User ID.
*	Dials *. (Used by many paging systems to designate a "-" in the pager display.)
%R	Relays the DTMF digits entered by the caller. This should be the caller's telephone number.
#	Dials # to end call.
-	Pauses 0.5 second.

How It Works

Per the notification schedule, Stratagy:

1. Dials the user's digital pager's telephone number.
2. When the pager answers:
   - Relays the User ID.
   - Relays the caller's telephone number.

For this example, the following displays on the pager: 2765-5833700.

Emergency Lists

In an emergency list, Stratagy is programmed to notify a series of users if a new message is not picked up. If the original recipient, after a specified time interval, has not picked up the new message, Stratagy continues to notify him/her but also begins notification to a second person.

After another time interval if the new message has still not been picked up, Stratagy continues to notify the first two people and starts notifying a third person. Stratagy continues the process until the message is picked up or everyone has been notified.

When creating an emergency list, carefully define the initial time to wait before starting the notification and the repeat time.

Program Example

Assume that you want to create three Notify records for one User ID. Each record contains a different telephone number to call; one for each of the three people who will potentially be notified.

➤ **To program the example**

1. Define the first Notify record to contain:

   Notify After: 0

   Continue Every: 5

   Max Times: 0

2. Define the second Notify record to contain:

   Notify After: 15

   Continue Every: 5

   Max Times: 0

3. Define the third Notify record to contain:

   Notify After: 30

   Continue Every: 5

   Max Times: 0

How It Works

When the emergency occurs:

1. The first Notify record starts notification immediately.
2. If the message is not picked up, the first Notify record continues notification every 5 minutes.
3. After 15 minutes, if the message is not picked up, the second Notify record starts notification every 5 minutes in conjunction with the first Notify record.
4. After 30 minutes, if the message is not picked up, the third Notify record starts notification every 5 minutes in conjunction with the first and second Notify records.
5. All three Notify records continue every 5 minutes until the message is picked up.

Auto Menu Examples

The following examples are included in this section:

Time of Day Greetings

You can program Stratagy so that your company has different greetings for mornings, afternoons, evenings, and weekends.

Program Example

In the following example, the User ID 990 (Company Greeting) assumptions are as follows.

The greetings:

Greeting 1 plays: "Thank you for calling Toshiba."

Greeting 2 plays: "Good morning. Thank you for calling Toshiba."

Greeting 3 plays: "Good afternoon. Thank you for calling Toshiba."

The schedules:

morning greeting schedule starts at: 8:00 a.m. Monday through Friday

afternoon greeting schedule starts at: 12:01 p.m. Monday through Friday

evening greeting schedule starts at: 5:01 p.m. Monday through Thursday

weekend greeting schedule starts at: 5:01 p.m. Friday

➤ **To program the example**

Scheduling the greetings includes defining the Auto records and recording the greetings for User ID 990.

For the morning greeting, define the Auto record as follows:

Enabled	Yes
Change On (date)	08/15/98
Change At (time)	08:00 (8:00 a.m.)
Every Month(s)	0
Every Day(s)	1
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	YYYYYNN
Extension	(leave blank)
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	2

For the afternoon greeting, define the Auto record as follows:

Enabled	Yes
Change On (date)	08/15/98
Change At (time)	12:01 (12:01 p.m.)
Every Month(s)	0
Every Day(s)	1
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	YYYYYNN
Extension	(leave blank)
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	3

For the evening greeting, define the Auto record as follows:

Enabled	Yes
Change On (date)	08/15/98
Change At (time)	17:01 (5:01 p.m.)
Every Month(s)	0
Every Day(s)	1
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	YYYYYNN
Extension	(leave blank)
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	1

For the weekend greeting, define the Auto record as follows:

Enabled	Yes
Change On (date)	08/15/98
Change At (time)	00:01 (12:01 a.m.)
Every Month(s)	0
Every Day(s)	1
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	NNNNNYY
Extension	(leave blank)
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	1

Access the User ID mailbox via telephone. Record:

Greeting 1: "Thank you for calling Toshiba."

Greeting 2: "Good morning. Thank you for calling Toshiba."

Greeting 3: "Good afternoon. Thank you for calling Toshiba."

How It Works

If a caller accesses User ID 990 (Company Greeting) during the morning (8:01 a.m. to 12:00 noon Monday through Friday), Stratagy:

1. Plays User ID 990's greeting 2 (Company Greeting).
2. Follows the User ID 990 chain to User ID 991 (Caller Instructions).

If a caller accesses User ID 990 (Company Greeting) during the afternoon (12:01 p.m. to 5:01 p.m. Monday through Friday), Stratagy:

1. Plays User ID 990's greeting 3 (Company Greeting).
2. Follows the User ID 990 chain to User ID 991 (Caller Instructions).

If a caller accesses User ID 990 (Company Greeting) during the evenings (5:01 p.m. Monday through Thursday to 7:59 a.m. the next morning) and weekends (5:01 p.m. Friday to 7:59 a.m. Monday), Stratagy:

1. Plays User ID 990's greeting 1 (Company Greeting).
2. Follows the User ID 990 chain to User ID 991 (Caller Instructions).

Holiday Greetings—Same Day Each Year

Certain holidays, such as Independence Day (July 4th), Christmas (December 25), and New Year's day (January 1st), occur on the same date each year.

To inform callers that your offices are closed for the holiday, you can record a greeting that plays only on the holiday.

Program Example

In the following example, the User ID 990 (Company Greeting) assumptions are:

- Greeting 1 plays: "Thank you for calling..."
- User ID 990 chains to User ID 991

The User ID 991 (Caller Instructions) assumptions are:

- Christmas greeting: greeting 4
- Start greeting time: 8:01 a.m.
- Days greeting plays: Monday through Friday

➤ To program the example

Scheduling the Christmas greeting includes defining the Auto record and recording the greeting for User ID 991.

1. Define the Auto record as follows:

Enabled	Yes
Change On (date)	12/25/99
Change At (time)	08:01 (8:01 a.m.)
Every Month(s)	12
Every Day(s)	0
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	YYYYYNN
Extension	(leave blank)
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	4

2. Access the User ID mailbox via telephone. Record:

   Greeting 4: "Our offices are closed December 25th to celebrate Christmas. We wish you all a happy holiday season. Please call back during regular business hours."

How It Works

When December 25th falls on a weekday, if a caller accesses User ID 990 (Company Greeting) after 8:01 a.m., Stratagy:

1. Plays User ID 990's greeting 1 (Company Greeting).
2. Follows the User ID 990 chain to User ID 991 (Caller Instructions).

3. Plays User ID 991's greeting 4 (Christmas greeting).

To guarantee that Stratagy programs the holiday schedule after the open greeting schedule, the holiday schedule starting time was scheduled one minute after the regular open greeting schedule.

Holiday Greetings—Different Day Each Year

Certain holidays, such as Thanksgiving and Labor Day, occur on different days each year.

To inform callers that your offices are closed for the holiday, you can record a greeting that plays only on the holiday.

Program Example

In the following example, the User ID 990 (Company Greeting) assumptions are:

- Greeting 1 plays: "Thank you for calling..."
- User ID 990 chains to User ID 991

The User ID 991 (Caller Instructions) assumptions are:

- Thanksgiving greeting: greeting 5
- Start greeting time: 8:01 a.m.
- Days greeting plays: Thursday

➤ **To program this example**

Scheduling the Thanksgiving greeting includes defining the Auto record and recording the greeting for User ID 991.

1. Define the Auto record as follows:

Enabled	Yes
Change On (date)	11/24/99
Change At (time)	08:01 (8:01 a.m.)
Every Month(s)	11
Every Day(s)	29
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	NNNYNNN
Extension	(leave blank)
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	5

2. Access the User ID mailbox via telephone. Record:

   Greeting 5: "Our offices are closed today so that we can celebrate Thanksgiving with our families. Please call back during regular business hours."

How It Works

Every year on Thanksgiving, if a caller accesses User ID 990 (Company Greeting) after 8:01 a.m., Stratagy:

1. Plays User ID 990's greeting 1 (Company Greeting).
2. Follows the User ID 990 chain to User ID 991 (Caller Instructions).
3. Plays User ID 991's greeting 5 (Thanksgiving greeting).

To guarantee that Stratagy programs the holiday schedule after the open greeting schedule, the holiday schedule starting time was scheduled one minute after the regular open greeting schedule.

To program holidays that occur on different days each year, define the Frequency of Change fields as 11 months and 29 days, restricted to the appropriate Days of the Week.

Extension Change

You can program a User ID to automatically access a different telephone number for the user on a particular day of the week, time of day, etc. by entering the telephone number in the Auto Record's *Extension* field.

Normally, Stratagy processes calls to the Users Menu *Extension* field; however, when a scheduled event occurs, Stratagy processes the calls using the Auto Record's *Extension* field.

For this example, assume that an employee works in a different office on Fridays than he does on Monday through Thursday.

Program Example

In the following example:

- User ID: 6340
- Friday's office telephone number: 3700

➤ **To program the example**

1. Define the Auto Record as follows.

Enabled	Yes
Change On (date)	08/09/98
Change At (time)	08:01 (8:00 a.m.)
Every Month(s)	0
Every Day(s)	7
Every Hour(s)	0
Every Minute(s)	0
Restricted To (MTWTFSS)	NNNNYNN
Extension	3700
Rings	(leave blank)
Do Not Disturb	On
Call Screening	Off
Greeting	(leave blank)

How It Works

Every Friday after 8:00 a.m., if a caller accesses User ID 6340, Stratagy directs the call to extension 3700.

Unsupervised Conferencing

If your telephone system supports unsupervised conferencing, you can schedule Stratagy to call an off-premise location for the conference call.

Program Example

In the following example:

- Conference code: *3
- Operation required to connect to calls in a conference: F-F-
- Telephone number: 583-3700
- Dial 9 for an outside line

➤ **To program the example**

Define the Auto record to contain:

Extension	***3-9W(2,T)5833700W(3,V)F-F-H**
*3	Conference code. (The code varies depending upon the telephone system.)
-	Pauses 0.5 second.
9	Dials 9 for an outside line.
W(2,T)	Waits up to 2 seconds to hear dial tone.
5833700	Dials the telephone number 583-3700.
W(3,V)	Waits up to 3 rings for a voice to answer.
F-F-	Performs a hookflash and pauses 0.5 second. Repeats function. (The code varies depending upon the telephone system.)
H	Hangs up immediately.

How It Works

For the day and time scheduled, Stratagy:

1. Dials the off-premise location for the conference call.
2. Connects the calls in a conference.
3. Hangs up.

AMIS Networking 9

Note Stratagy Flash does not support AMIS.

Audio Messaging Interchange Specification (AMIS) is the analog networking protocol that enables Stratagy to pass voice messages to any remote voice mail system that supports the AMIS protocol.

This chapter discusses the following:

- AMIS mailboxes
- AMIS node
- System Identification Number
- Configuring Stratagy for AMIS
- Testing AMIS
- AMIS operation
- AmisNodeList

Note The AMIS analog networking specification does not support transmission of a fax message over the AMIS analog network.

AMIS Mailboxes

Stratagy implements AMIS by using two specific mailboxes – Gateway and Proxy – that contain information and direction about a remote voice mail system or node. The node identifies itself to Stratagy by a local telephone number (i.e., System Identification Number) that is sent to the receiving voice mail system during the transmission process.

Remote mailboxes, whether represented by Proxy mailboxes or through Gateway mailboxes, can be members of distribution groups.

Gateway Mailboxes

Each system in the AMIS network must have a *unique* mailbox address called a node. The only requirements for a node number is that it be one~eight digits long and be unique. For example, the Stratagy system's Gateway mailbox at the Dallas office might be node "40," while the Stratagy at Los Angeles might be "33."

To send a message to another Stratagy system user using a Gateway mailbox, you must enter the Stratagy system's node number plus the addressee's User ID mailbox number.

For example, when a user in the Dallas office (node 40) sends a message to mailbox 200 in Los Angeles (node 33), the destination address is: "33200." Once the message is addressed and sent, the local Stratagy system (node 40) does the following:

1. Accesses its Gateway mailbox (node 40) and uses the information stored there to contact the remote voice mail system (node 33).
2. Provides some handshake signals requesting mailbox 200.
3. Audibly transmits the message.

The remote system (node 33) receives the message and stores it in mailbox 200.

An exception occurs if the 33200 destination address also exists on the local Stratagy system. The user must follow the node number with "*" (e.g., 33*200) when entering the destination. This flags the message as an AMIS message and the Stratagy system delivers the message to Gateway mailbox 33 at Los Angeles instead of Dallas mailbox 33200.

Proxy Mailboxes

The Proxy mailbox represents a specific User ID mailbox on a remote node and resides on the local Stratagy system. A Stratagy user addresses a message to a Proxy Mailbox in the same manner as he/she would a local user. Once the message is addressed and sent, the Proxy mailbox initiates the AMIS transfer. This gives the appearance to the local user that the remote user has a mailbox on the local system.

For example, assume User ID mailbox 2300 is a mailbox on a voice mail system in Dallas. The same number also resides as a Proxy mailbox on the local Stratagy. When messages are left for Proxy mailbox 2300 on Stratagy, the system uses the information stored there to contact the Dallas voice mail system, provides some handshake signals requesting User ID mailbox 2300, then audibly transmits the message. The Dallas voice mail system would receive the message and store it in User mailbox 2300.

Important! *It is not necessary for the remote mailbox number to match the Proxy mailbox number in Stratagy.*

AMIS Node

An AMIS node is a voice mail system in an AMIS network. Each node in the network is identified in two ways. First, there is a unique node number (the box number of the Gateway mailbox) that must be used as part of the message address when sending, forwarding or replying to a message. Second, the nodes use the System Identification Number, which is part of the AMIS protocol, to identify themselves to each other during AMIS connections.

As more advanced features have been added to the DOS®-based Stratagy systems, memory management has become a critical issue in software development. Because of this, TAIS/TSD looks toward feature interaction as a way to create more operating system memory when developing new features. With the addition of the Call Record feature to the DOS-based products with Release 3.3 software, the number of default Audio Messaging Interchange Specification (AMIS) networking nodes has been reduced to 200. In addition, further restriction to the number of AMIS networking nodes will be required to support IVP8 systems with multi-lingual prompts.

The fewer AMIS nodes the system is configured for, the more operating system memory is available for other features. The Stratagy systems reserve enough operating system memory to run the number of AMIS nodes specified in the *amis_max_nodes* parameter in the Stratagy System Configuration. Additionally, a system using more features and a higher configuration requires more operating system memory. For example, an eight port IVP8 system with a high amount of call traffic using the new Call Record feature requires more operating system memory than a system with fewer ports and/or less traffic. Multi-lingual prompts have been specifically identified as a feature that requires a reduction in the number of AMIS nodes to increase Operating System (OS) memory for proper system operation.

Due to the number of feature configurations possible in a Stratagy system, it is not possible for TAIS/TSD to accurately identify the correct number of AMIS nodes in each case. If the system you are working on runs out of OS memory, the failure causes the system to continually reboot. To correct this, the number of AMIS nodes must be reduced.

System Identification Number

The System Identification Number consists of a country code (the digit "1" in North America), area code, and seven-digit phone number. This number not only identifies the calling system, but can also be used by the administrator to configure the local system to enable message replies.

Configuring Stratagy for AMIS

There are three steps to configuring Stratagy to act as an AMIS node:

1. Set the Stratagy AMIS system parameters.
2. Create Gateway mailboxes for each remote system with which Stratagy communicates.
3. Create Proxy mailboxes for each remote user that wishes to have a local mailbox.

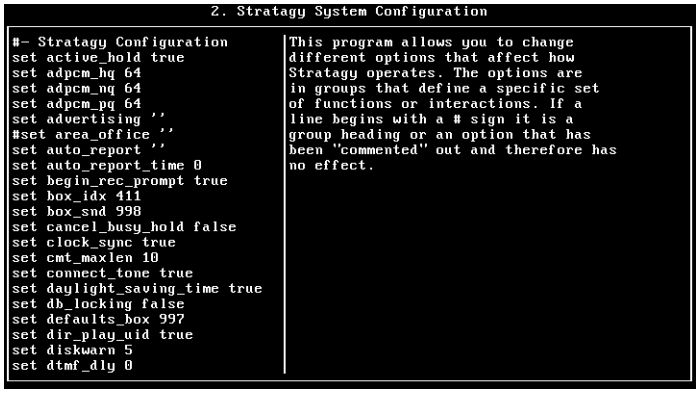
Step 1: Set AMIS Parameters

For AMIS to operate correctly, you must activate the AMIS configuration parameters in the Stratagy system and modify their settings. Table 9-1 lists the required parameters and their correct settings.

1. From the Stratagy Configuration Utility screen, press **2**

   ...or use the arrow keys (↑↓) to highlight Stratagy System Configuration and press **Enter**.

   The Stratagy System Configuration Screen is split into two areas: the left screen area lists the actual parameters and their values, the right screen area lists context-sensitive help for each parameter. See Table 9-1 for a list of the parameters, their definitions and default settings.



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2. Using the arrow (↑↓) or **Page Up** and **Page Down** keys scroll to the AMIS configuration parameter section.
3. Modify the parameter using the line editor at the top of the screen. For each parameter listed in Table 9-1, remove the starting **#**. Then set appropriately.
4. Press **Enter** to save your changes

   ...or **Esc** to exit without saving changes.
5. Press **Esc**. The Stratagy Configuration Utility screen displays.

Note We recommend that you back up the current database at this time by selecting the Stratagy Backup Utility. See "Backup Utility" on page 11-3 .

6. Press **Esc** again. Stratagy reboots and returns to the Main Menu for call processing or Stratagy programming.

Table 9-1 AMIS Parameters

Parameter	Description
amis_diskfull	Percentage of the flash drive that must be free in order for Stratagy to accept new AMIS messages. If free space is less than this figure, Stratagy tells the calling AMIS system that the flash drive is full. Default: 5 (To enable, remove the starting # and set the value.)
amis_enabled	Whether Stratagy processes incoming AMIS calls. True: Stratagy processes incoming AMIS calls. False: AMIS calls told that this node is not accepting network calls. Possible values: true, false Default: true (To enable, remove the starting # and set the value.)
amis_ltm	User ID to use for the AMIS Loopback mailbox. User ID mailbox other AMIS nodes can use for testing the network. Any AMIS message to this mailbox is sent back to the sender, if accessible from this Stratagy system. Possible values: valid User ID. The single quotes are required. Default: '989' (To enable, remove the starting # and set the value.)
amis_max_attempts	Special retry count that keeps track of how many times this system was called without a successful handshake after answer. If the count is exceeded, then the gateway is disabled. Possible values: 1~5 Default: 3 (To enable, remove the starting # and set the value.)
amis_max_node	Maximum number of remote nodes (Gateway and Proxy mailboxes) that can be in the network. If the actual number exceeds this value, some nodes are inaccessible. Possible values: 1~256 Default: 256 (To enable, remove the starting # and set the value.)
amis_rna	Enables the ring no answer time-out to be increased to enable slow answers from AMIS systems. Possible values: 1~9 Default: 3 (To enable, remove the starting # and set the value.)
area_code	Area code of the resident Stratagy system. Single quotes are required. Default: ' ' (To enable, remove the starting # and set the value.)
country_code	Country code of the resident Stratagy system. Single quotes are required. Default: '1' (North America) (To enable, remove the starting # and set the value.)
local_amis_node	User ID of the Gateway box that represents the local AMIS node. Messages addressed to this node are delivered directly to the real local box number instead of being shipped out on the network. Possible values: valid User ID. Default: 0 (To enable, remove the starting # and set the value.)
phone_number	Local telephone number of the resident Stratagy system. Single quotes are required. Default: ' ' (To enable, remove the starting # and set the value.)
unknown_node_action	Whether Stratagy accepts messages from unknown AMIS nodes. 1: Refuses to accept messages. 2: Delivers this message even though replies are impossible. Possible values: 1, 2 Default: 2 (To enable, remove the starting # and set the value.)

Step 2: Create and Program AMIS Mailboxes

Messages are forwarded to, or received from, the remote User ID mailboxes via the Gateway or Proxy mailboxes. The Gateway and Proxy mailboxes must be programmed for AMIS networking to operate properly and involves defining Users and Notify Menu fields. Stratagy processes the Notify record information, including the **KN( )** token programmed in the *Method* field, to perform AMIS out-dialing and access the AMIS network.

➤ To create and program a Gateway mailbox

1. From the Users Menu, define the following Users Menu fields (see Chapter 6 – Menus).

User ID	Any valid User ID
Comment	GATEWAY MAILBOX and any other identifying information.
Extension	Play greeting that explains that this is a network mailbox then route the call to hang up or another menu.
Example	@P(G1)H
Store Messages	YES
Gateway Box	YES
AmisSysNumber	Telephone number remote node uses as identification. The format (including # signs): 1#area code#telephone number#.
Example	1#714#5551212#

2. From the Notify Menu, highlight the first available <*Disabled*> description line and press the spacebar to toggle the Notify Record Options *Enabled* field to YES. (See "Notify Menu" on page 6-27.)
3. Press **ALT+T** to select Templates.
4. Highlight the AMIS DELIVERY template and press **Enter**.
5. Define the Notify Menu fields:

MTWTFSS	Toggle between Y and N for days AMIS should attempt to call the remote node.
From	Time for Stratagy to start attempting AMIS call outs.
To	Time for Stratagy to stop attempting AMIS call outs.
Notify After	Number of minutes after the message has been sent to the Gateway mailbox should Stratagy attempt to contact the remote node. If this is the only record in the Notify Menu, uses the default value 0. If other records appear in this Notify Menu, set Notify After to a different number of minutes for each record to avoid conflicts.
Continue Every	Number of minutes between each retry attempt to contact the remote node.
Max Times	Number of times Stratagy should attempt to contact the remote node.
Title	AMIS DELIVERY. Comment or reminder that identifies the call out definition or destination.
Type	NORMAL (standard) or URGENT (optional), as appropriate.
Method	Program the **KN( )** token inserting the line access code and the %V variable. ExampleKN("9,%V"). (For details see Chapter 7 – Token Programming.)
Variable	Value Stratagy inserts in place of %V in the Method field. Enter the telephone number of the remote node. Programming Language Tokens.)

6. Press **Alt+S** to save the record.

7. Access the User ID mailbox via telephone and record Greeting 1: <explains that this is a network mailbox>.

➤ **To create and program a Proxy mailbox**

1. From the Users Menu, define the following Users Menu fields (see Chapter 6 – Menus).

User ID	Any valid User ID or the same number as the remote mailbox, providing there are no conflicts with existing User ID mailboxes on the local system.
Comment	PROXY MAILBOX and any other identifying information.
Do Not Disturb	ON
Store Messages	YES
Gateway Box	YES
AmisSysNumber	Telephone number remote node uses as identification. The format (including # signs)1#area code#telephone number#.
Example	1#714#5551212#.

2. From the Notify Menu, highlight the first available <*Disabled*> description line and press the spacebar to toggle the Notify Record Options *Enabled* field to YES. (See "Notify Menu" on page 6-27 .)
3. Press **`ALT+T`** to select Templates.
4. Highlight the AMIS PROXY template and press **`Enter`**.
5. Define the following Notify Menu fields:

MTWTFSS	Toggle between Y and N for days AMIS should attempt to call the remote node.
From	Time for Stratagy to start attempting AMIS call outs.
To	Time for Stratagy to stop attempting AMIS call outs.
Notify After	Number of minutes after the message has been sent to the Gateway mailbox should Stratagy attempt to contact the remote node. If this is the only record in the Notify Menu, uses the default value 0. If other records appear in this Notify Menu, set Notify After to a different number of minutes for each record to avoid conflicts.
Continue Every	Number of minutes between each retry attempt to contact the remote node.
Max Times	Number of times Stratagy should attempt to contact the remote node.
Title	AMIS PROXY. Comment or reminder that identifies the call out definition or destination.
Type	NORMAL (standard) or URGENT (optional), as appropriate.
Method	Program the **KN( )** token inserting the line access code, the %V variable, and the number of the User ID mailbox on the remote node. If the number is the same as the Proxy mailbox on the local Stratagy, then use %U (replaces with current User ID number).
Example	KN("9,%V,%U").
Variable	Value Stratagy inserts in place of %V in the Method field. Type the telephone number of the remote node.

6. Press **`Alt+S`** to save the record.
7. Have the owner of the mailbox record a personal greeting for the Proxy mailbox.

Testing AMIS

One method of testing AMIS involves using the AMIS Loopback User ID (default 989). When enabled using the Stratagy system configuration parameter *amis_ltm*, this User ID can be used by other AMIS nodes for testing the network. Stratagy sends any AMIS message to this User ID back to the sender, assuming the sending system is accessible from the Stratagy system.

A line monitor can be used to analyze AMIS transmissions. However, to validate AMIS completely, an in-depth knowledge of AMIS Analog Protocol is required.

AMIS Operation

Note AMIS messages can only be sent from User ID mailboxes.

AMIS networking operation consists of the following steps:

➤ **To send a message over the AMIS network**

1. The user logs into his/her mailbox.
2. From the Main Menu, the user presses **2** for the Send Messages menu.
3. The user specifies the destination address as one of the following:
   - node + mailbox number – if the address is a unique combination of the Gateway mailbox and destination mailbox.
   - node + ***** + mailbox number – if the address is not a unique combination of the Gateway mailbox and destination mailbox.
   - Proxy mailbox number – if addressing the message to a Proxy mailbox.

   where:

   NODE = up to eight digits

   remote mailbox number = up to 16 digits
4. The user records the message and presses # to stop recording.
5. The user presses **#** again to send the message to the specified node.

Once the message has been sent, Stratagy dials the remote System Identification Number. The message is placed in the remote mailbox and the user is returned to the Main Menu. If the transmission fails, Stratagy retries up to nine times before returning the message back to the user for one of the following reasons:

- Remote node does not answer
- Remote node is busy
- Message is too long
- Node’s phone number is incorrect
- Mailbox number does not exist
- Mailbox not accepting messages
- Mailbox is full
- Protocol error

Private/Urgent Message Handling

Because AMIS does not support Special Delivery Options, the Stratagy proprietary options such as “private” or “urgent” are striped off when the message is sent via AMIS. These messages at the receiving mailbox are handled as normal messages.

However by using the Notify record, Stratagy can use the “urgent” option to determine the timing of the transmission. For example, normal messages can be delivered after 5:00 p.m. and the urgent messages immediately.

Notification

Each remote node is represented by a Gateway mailbox in the local node. The node number is the mailbox’s User ID. When a message is addressed to a remote node, it is placed in the Gateway mailbox, with information in its header that identifies the remote box number, and the fact that it is an AMIS-deliverable message.

A notify task is started to deliver messages to the remote site. There can be several notification tasks for a Gateway mailbox. For each notification task, a maximum of nine messages can be transmitted. The number of messages that can be stored in the Gateway mailbox is set by the system maximum.

If a notify task was started as the result of an urgent message being placed in the Gateway mailbox, it is only allowed to deliver the urgent message to the remote node. The urgent status is stripped from the message when it is sent.

AMIS Notification Templates

Two templates exist:

- AMIS DELIVERY – for Gateway mailboxes
- AMIS PROXY – for Proxy mailboxes

AMIS Tokens

The notification token program in a Gateway mailbox must use an “AMIS delivery” **KN( )** token which is responsible for actually sending the message to the remote site.

Note For detailed information on the AMIS token or templates, see Steps 1 and 2 under “Configuring Stratagy for AMIS” on page 9-3.

AmisNodeList

This is a list of known nodes in the network. Each entry on the list contains the node’s User ID, a comment identifying the node and the AmisSystem Number (the node number plus the node’s System Identification Number).

The list displays the:

- Mailboxes that have the *Gateway Box* field set to Yes
- Mailbox number of AMIS mailboxes
- Comments of AMIS mailboxes
- AMIS system number

View AMIS Node User IDs

1. Press **Alt**+**T**.
2. Use the arrow keys (↑↓) to highlight AmisNodeList.

3. Press **Enter**. AMIS node User IDs list in numerical order. For field definitions, see the "Options Screen" on page 6-8 for screen fields descriptions.
4. Press **Esc**. The Users Menu displays.

Access Specific User ID from AmisNodeList Screen

1. From the NodeList screen, use the arrow keys (↑↓) to highlight the User ID.
2. Press **Enter**. The Users Menu displays with this User ID's information.

System Reports 10

Tracking the Stratagy system involves analyzing system operation and User ID activity. This chapter discusses:

- View system/user activity
- Listen to system activity
- Report types
- Report definitions
- Run, view, print a report
- Save report to floppy disk
- Automatic report generation

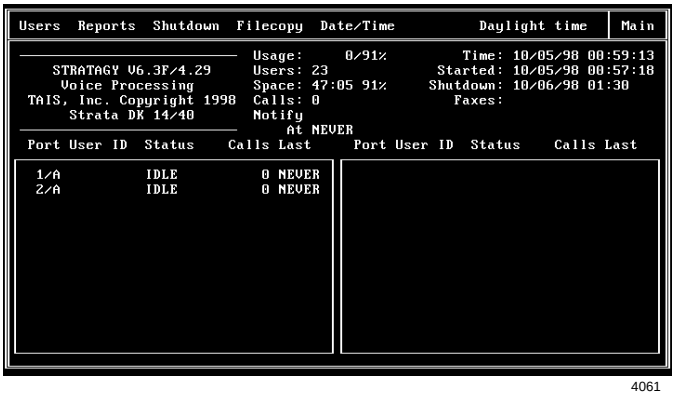
Note Stratagy is also equipped with a diagnostic tool called Trace which assists you in troubleshooting applications. See Chapter 11 – Maintenance, Upgrades and Troubleshooting for information.

View System/User Activity

You can track system and user activity on the Stratagy system by viewing the Main and Users Menus, respectively.

Main Menu Statistics

The Main Menu displays (shown at right) the system activity statistics.



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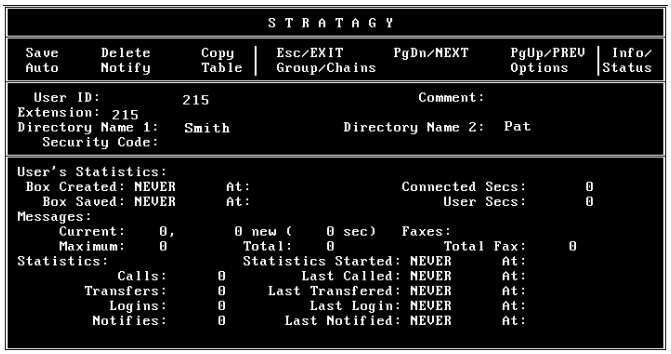
The menu provides:

- Port activity and CPU usage
- Number of defined User ID mailboxes
- Available flash drive space in time and percent of the flash drive
- Number of calls answered since the system started
- Notify activity
- Date and time system last started
- Next date and time of scheduled shutdown

See Chapter 3 – Access and Use Stratagy for details.

Users Menu Statistics

The Users Menu (Info/Status Screen) displays (shown at right) the User ID statistics.



4063

In addition to the screen display, a report can also be generated based on the statistics shown. ("Report Definitions" on page 10-3.) The menu provides:

- Date and time User ID was created
- Date and time User ID was last modified
- When date and time statistics were last reset
- Message activity
- Caller activity
- User activity

See Chapter 6 – Menus for details on the statistics.

Listen to System Activity

When logged on to the System Administrator User ID mailbox, you can select Review System Status. Stratagy plays (verbally) the status information:

- Percent of flash drive space remaining
- Number of ports in use
- System date and time

See Chapter 8 – Customization Examples for details.

Report Types

You can generate a variety of reports that provide information about the Stratagy system and User ID mailboxes.

- Log information using the Stratagy Filecopy option to import a log file into a program on another PC (see "Log Information" on page 10-2 for details)
- Users Menu information using the Stratagy Reports Menu

Log Information

If you need more system or User ID information, Stratagy provides the following logs.

- Message – Logs every received message and every User ID that checks for messages along with the DTMF entered. Includes date and time for each entry.
- Stratagy (System) – Logs startup, execution error, and shutdown information and system actions.

- User ID – Logs the date, time, and User ID number whenever a User ID is accessed via DTMF. Useful for creating a data file which can later be analyzed for call distributions and accesses by dates, days, and times.
- Fax – (not supported)
- Trace.out/Trace.old – Logs system activity while Stratagy is active.
- Ctask.log/Ctask.old – Logs debugging information to a file if the system encounters a fatal error caused by an invalid pointer.

See Chapter 11 – Maintenance, Upgrades and Troubleshooting and Chapter 4 – Configure Stratagy for instructions on activating and using these log files.

Users Menu Information

With the Reports Menu, you can generate a variety of reports that provide information about the Stratagy system and User ID mailboxes.

Reports may be run for a specific User ID, a range of User IDs, or all active User IDs. When you run a report, Stratagy compiles information according to the report definition for the User ID mailboxes selected.

After running a report, you can view, print, or save the report to a file. Viewing and printing is restricted to 80 characters across; outputting to a file is not restricted.

Report Definitions

Defining the contents of a report involves selecting the Report Definition Fields from the Reports Menu. This report definition can be saved for future reports you want defined using this format, and once saved, can be used to generate a report automatically at a specified time each day.

Once a report definition is created, you can run a report using the definition. Stratagy selects and sorts the report information according to the report definition (See “Run Report” on page 10-5). After running a report, you can view, print, or save the report to a file.

Create Report Definitions

1. From the Main Menu, press **Alt+R**.
2. Type the password and press **Enter**. (The default password is **Stratagy**, with the first letter uppercase.) The Reports screen displays (see Figure 10-2).
3. Number the Report Definition Fields in the column order you want them to appear on the report.

   For example, if you want a report listing the User ID, Calls Last, and Messages Maximum from left to right, the values for these fields would be:

   User ID: **1**

   Messages Maximum: **3**

   Calls Last: **2**
4. Select Save by pressing **Alt+S**.

Note Only report definitions which you plan on using again should be saved.

5. Enter the name and press **Enter**.

   Report names may be up to eight alphanumeric characters long (A~Z, 0~9) and are not case sensitive, e.g., report names LISTING, Listing, and listing all reference the same file. The Reports Menu displays.

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6. When you have finished with the Reports Menu, press **Esc**. The Main Menu displays.

Load Exist Report Definition

1. From the Reports screen, press **Alt+L**.
2. Type the name of the report definition

   ...or press **F2** to display a list of saved report definitions. Highlight the report name and press **Enter**.
3. Press **Enter** again. The Reports Menu displays the report definition selection.

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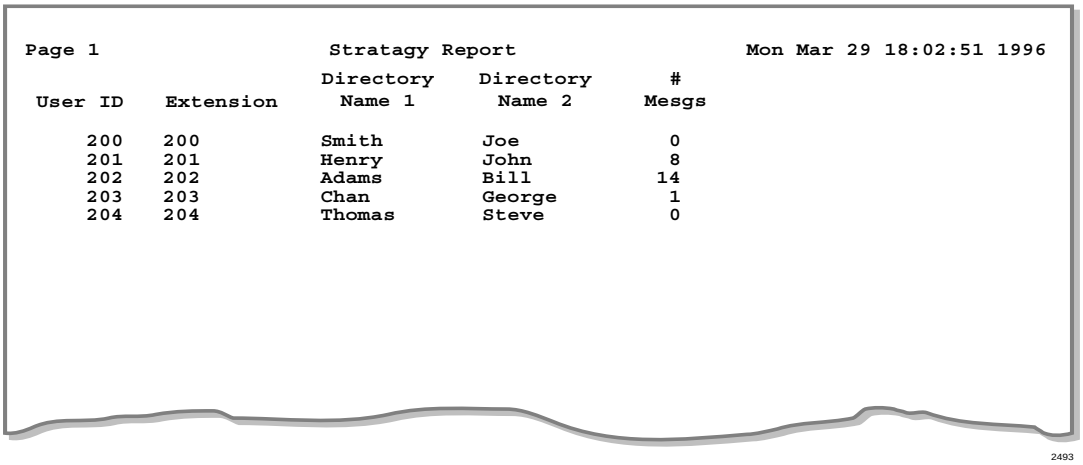
Run Report

When you run a report, Stratagy compiles the report according to the report definition and User ID mailboxes you selected. The reports are compiled in columns, displaying each column's title across the top of the page. User IDs are listed in increasing order. See Figure 10-1 for a sample report.



```
Page 1                    Stratagy Report                    Mon Mar 29 18:02:51 1996

                         Directory     Directory        #
 User ID    Extension     Name 1        Name 2        Mesgs

     200    200           Smith         Joe             0
     201    201           Henry         John            8
     202    202           Adams         Bill           14
     203    203           Chan          George          1
     204    204           Thomas        Steve           0
```

2493

Figure 10-1 Sample Report

After running the report, Stratagy stores it in a temporary file on the flash drive. When the next report is run, the previous report file is overwritten.

Until another report is run, you can view, print, or save the report to a file on a floppy disk.

Note Reports are run and saved on the Stratagy system but must be file copied to the remote PC using the Stratagy Admin software to view or print them.

1. From the Reports screen, create a report definition (see "Create Report Definitions" on page 10-4)

   ...or load an existing definition (see "Load Exist Report Definition" on page 10-4).

   The Report screen with the definition displays.

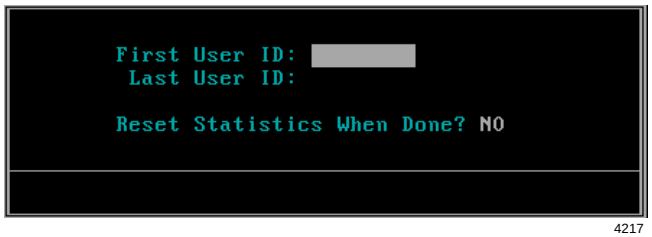
2. Press **Alt+R**.

3. Type the range of User IDs you want to include in the report or leave both fields blank to access all User IDs.

4. In the Reset Statistics When Done field, press **Enter** to accept the **NO** default. Stratagy does not reset the statistics.

   ...or type **YES** and press **Enter**.

   Stratagy initializes the statistics for each User ID in the selected range to 0.



```
First User ID:
 Last User ID:

Reset Statistics When Done? NO
```

4217

Important! *If you reset the statistics, Stratagy cannot retrieve the old values after running the report.*

The report starts running. While running, Stratagy displays the User ID currently being processed. When Stratagy finishes compiling the report, the Reports Menu displays.

View Report

1. From the Reports Menu, press **Alt+V**.

Note Viewing is restricted to 80 characters across. If your report is too wide for the screen, only the columns that fit display.

2. Use the arrow keys (↑↓) or **Page Up** and **Page Down** to view different parts of the report.
3. Press **Esc** to exit the report.

Print Report

To use the Print option, the Stratagy system Configuration parameter *1pt_port* must define the printer port Stratagy should use. See Chapter 4 – Configure Stratagy.

➤ From the Reports Menu, press **Alt+P** to select Print.

Note Printing is restricted to 80 characters across.

Save Report to Floppy Disk

By saving the report to a floppy disk, you can read or import it to another PC that has a 1.44 MB floppy-disk drive. Since Stratagy creates reports in standard ASCII format, you can edit and import reports into programs such as word processors, spreadsheets, and databases.

Important! *Do not output the report to a permanent file on Stratagy's drive. Saving reports to the flash drive can lead to outdated files that are never deleted and an inefficient use of drive space that is needed for voice processing.*

1. Place a formatted standard IBM-compatible 3.5-inch 1.44 MB floppy disk in drive A: of the Stratagy Admin PC.
2. From the Main Menu, press **Alt**+**T** to select the Tools option.
3. Select Filecopy form the Tools Menu.
4. In the *Source System* field (where the file currently resides), press **F2** to display a pop-up box of selections. Highlight PC and press **Enter**.
5. In the *Copy From:* field, type the directory and file names (e.g., **A:\report.txt**).
6. In the *Copy To:* field, type **report.txt** and press **Enter**. The file copies to the Stratagy Admin PC's floppy-disk drive (drive A:).

Automatic Report Generation

Using a saved report definition, you can configure Stratagy to generate automatically a report at a specified time each day. See Chapter 4 – Configure Stratagy for detailed instructions on modifying parameters.

➤ **To generate automatically a report using the Stratagy Configuration Utility**

1. Set the *auto_report* parameter to active and specify the name of the report to be generated automatically. For example, if the name of the saved report definition is daily.rpt, the parameter is *set auto_report 'daily.rpt'*.
2. Set the *auto_report_time* parameter to active and specify the time of day to generate the report each day. For example, if the time is 2:15 p.m., the parameter is *set auto_report_time 1415*.

Report Menu Field Descriptions

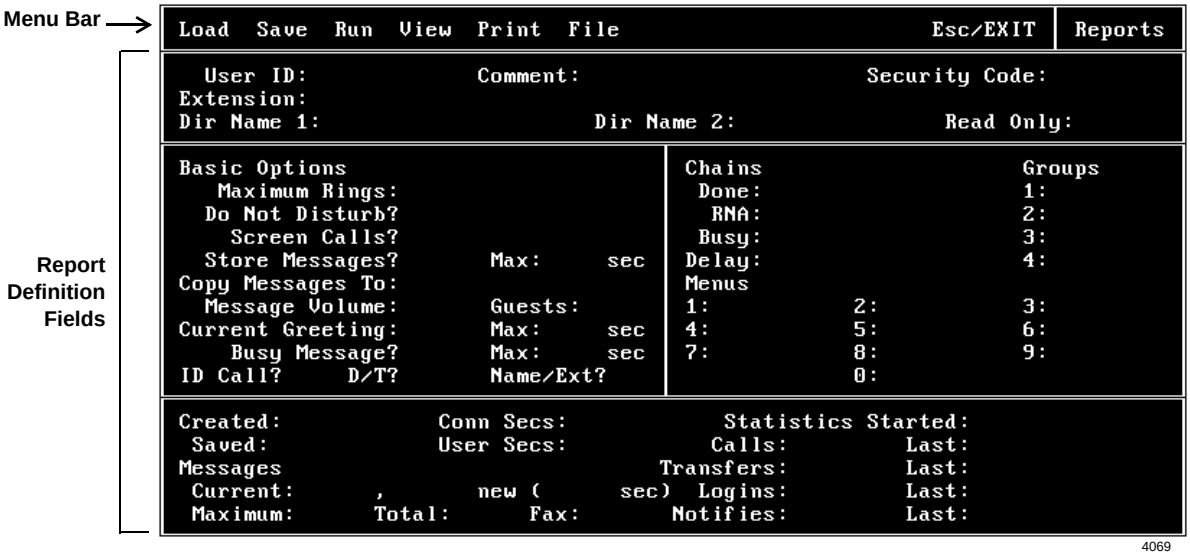


Figure 10-2 Reports Menu with Sample Data

Table 10-1 Reports Menu Screen Fields

Menu Bar Access Options (select)	
Load	Press **Alt+L** to load a previously saved report definition.
Save	Press **Alt+S** to save current report definition.
Run	Press **Alt+R** to compile a report using the report definition you just created or loaded and the User ID range selected.
View	Press **Alt+V** to display the last report you ran.
Print	Press **Alt+P** to print the last report you ran.
File	Press **Alt+F** to output the last report you ran to a file.
Esc/Exit	Press **Esc** to exit the Reports Menu and return to the Main Menu.
Report Definition Fields	
(Select to create a report definition: See Chapter 6 – Menus for field definitions.)	

Maintenance, Upgrades and Troubleshooting 11

This chapter covers the maintenance and upgrade procedures for the Stratagy system. In addition, it gives you procedures to identify and correct faults within the system.

Maintenance and Upgrades

The Stratagy system's integrated design makes it easy to maintain and relatively maintenance free. Since the serial communications ports, the RJ-11C voice port connectors and the flash memory are all resident on the motherboard, the need for peripheral boards and internal connectors is eliminated. In addition, the flash memory device used in the Stratagy unit contains no moving parts, unlike traditional hard drives.

The Stratagy Admin software provides the utility and diagnostic programs to maintain and monitor the Stratagy system.

This section discusses:

- **Tools Utility** – Available from the Main Menu, this utility consists of procedures that:
  - Back up and restore databases and/or mailbox names and greetings
  - Upgrade Stratagy software
  - Retrieve trace files
  - Copy files to and from the flash memory of the Stratagy and the Stratagy Admin PC's hard drive
  - Configure the Stratagy software
  - Change the Toshiba Plug and Play option
  - Modify codes and integration patterns using the Telephone System Configuration option

Note For instructions on using the Stratagy System Configuration, Toshiba Plug and Play, and Telephone System Configurations options, see Chapter 4 – Configure Stratagy.

- **Stratagy Voice Port Upgrade** gives you information required when requesting a port upgrade.

Tools

This section discusses the following selections on the Tools menu:

- Backup Utility
- Restore Utility
- Upgrade Stratagy Software
- Retrieve Trace File
- Filecopy

Figure 11-1 shows the complete Tools menu. For the Telephone System Configuration, Toshiba Plug and Play, and Stratagy System Configuration options, see Chapter 4 – Configure Stratagy for details.

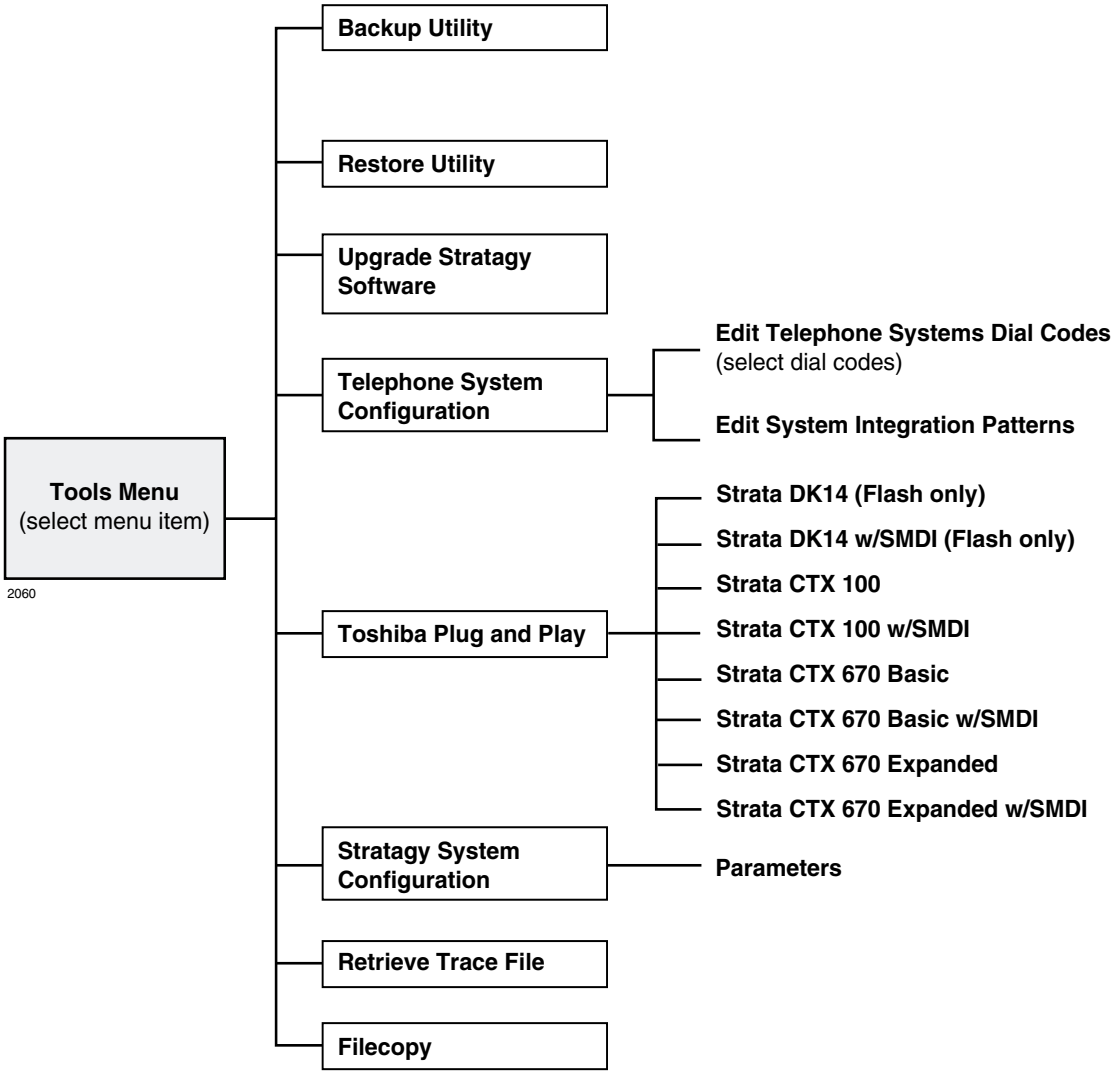


Figure 11-1 Navigating the Tools Menu

Backup Utility

The Stratagy Backup Utility is used to back up information from the flash memory of the Stratagy to the Stratagy Admin PC's hard drive.

CAUTION! Because of possible errors that can be induced through the telephone network, Toshiba advises that you perform the Backup Utility on site.

Backup functions are available for either a customer's database or mailbox names and greetings, or both. They consist of:

- **Database**
  All mailbox settings and information, Stratagy system configuration settings, notification templates, auto schedules, and all information concerning the selected telephone system's integration information.
- **Mailbox names and greetings**
  All names and greetings that have been recorded for all programmed mailboxes (personal and company).

Backing up your Stratagy system regularly enables you to restore the system with minimal data loss if the system fails.

Note Messages cannot be backed up.

CAUTION! During the Backup and Restore procedures, the Stratagy cannot process calls. When any Backup or Restore function is selected, Stratagy Admin queries the Stratagy concerning calls currently in progress. If calls are in progress, Stratagy Admin asks if the calls can be terminated. If call termination is selected, any current connection is disconnected, and all ports are commanded to go off-hook to prevent any further calls. If call termination is denied, the Backup or Restore procedure is halted.

If the connection between the Stratagy Admin PC and Stratagy is lost, communication can be re-established by simply shutting down and restarting the Stratagy Admin in the usual manner.

If the connection between the Stratagy Admin PC and the IVP8 is through the internal modem, that connection is the only one NOT dropped if a Backup or Restore function is selected. If this type of connection is dropped, the IVP8 port goes idle and accepts new incoming calls. Connection to the internal modem can be re-established through this port.

Back up the Database(s)/Names/Greetings

1. From the Tools menu, press **`Enter`**.
2. From the Backup screen (shown at right), enter the selection number.

   A second screen requesting a backup directory displays.
3. The directory defaults to **`C:\VSA3\BACKUP`** on the

Stratagy Admin PC for the Flash and **C:\ADMIN3\BACKUP** for the IVP8. If you want the back up to be stored in a different directory, type over the default. Press **Enter**.

We recommend that the new directory name represent the site that is being backed up. For example, if backing up ABC Company, you can enter the directory name "**C:\xxxx\BACKUP\ABC**".

Notes

- You cannot back up files to the Stratagy Admin PC's floppy disk drive.
- Be sure to enter the complete path, including the drive letter.

4. (Optional) If you entered selection 2 "Backup Names & Greetings" in Step 2, you are asked to enter a beginning and ending mailbox number. Type the mailbox numbers and press **Enter** after each entry.

Note Leaving both fields blank defines all mailboxes.

...or if you entered selection 3 "Backup Database, Names & Greetings" in Step 2, press **Enter** in the mailbox fields to leave them blank.

Important! *This selection backs up the entire database and all names and greetings. You cannot backup selective mailboxes.*

Before the backup starts, Stratagy Admin calculates the time the backup takes and displays a status message (sample shown at right).

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5. Verify that the Stratagy Admin PC has enough available disk space to accommodate the backup file.

   Based on the Stratagy's estimated Backup time (shown on your screen), use the calculations shown below to estimate the required flash drive space.

Transmitting at:	Bytes Per Second (bps) written to flash drive:
9600 bps	800 bytes
4800 bps	400 bytes
2400 bps	200 bytes

   Example: If Stratagy Admin displays a five minute backup time and communication is at 9600 bps, then:

   5 minutes = 300 seconds
   300 seconds x 800 bytes = 240,000 bytes

   BPS values are not exact. Additional amounts have been factored in to estimate a higher quantity of space than is actually required.

6. If your Stratagy Admin PC's hard drive has enough available disk space, press **Y** to backup the files

   ...or if not, press **N** to cancel the backup procedure.

   You are asked if you want to shut down active voice channels.

7. Press **Y** to continue.

CAUTION! If Stratagy is not rebooted, all ports remain in an off-hook condition.

---

8. When the backup is complete, press **Y** to reboot Stratagy. The Stratagy Admin PC returns to the **C:** DOS prompt.

Note You cannot reconnect to IVP8 using Stratagy Admin until the IVP8 status light is green. Any attempt prior to that time fails.

Restore Utility

CAUTION! Because of possible errors that can be induced through the telephone network, Toshiba advises that you perform the Restore Utility on site.

The Stratagy Restore Utility is used to restore previously backed up names, greetings and/or database from the Stratagy Admin PC to the Stratagy.

Restore the Database(s)/Names/Greetings

CAUTION! Stratagy Voice Processing is suspended during the restore procedure. Any existing connection is broken. For additional information on the Restore procedure, see the Caution on page 11-3.

1. From the Tools menu, press **2**.
2. From the Restore screen (shown at right), enter the selection number. A second screen displays requesting the source directory.

3. The directory defaults to **C:\VSA3\BACKUP** on the Stratagy Admin PC for Flash and **C:\VSA3\BACKUP** for the IVP8. If you have the file(s) backed up to a different directory, type over the default. Press **Enter**.

Notes

- Restoring files from the Stratagy Admin PC's floppy disk drive is not supported.
- Be sure to enter the complete path, including the drive letter.

4. (Optional) If you entered selection 2 "Restore Names & Greetings" in Step 2, you are asked to enter a beginning and ending mailbox number. Press **Enter** after each entry

Note Leaving both fields blank defines all mailboxes.

...or if you entered selection 3 "Restore Database, Names & Greetings" in Step 2, press **Enter** in the mailbox number fields to leave them blank.

Important! *This selection restores the entire database and all names and greetings. You cannot restore selective mailboxes.*

Before the restore starts, Stratagy Admin calculates the time the process takes and displays a status message (sample shown at right).

5. Press **Y** to restore the files

...or **N** to cancel the procedure.

You are asked if you want to shut down active voice channels.

6. Press **Y** to continue.

CAUTION! If Stratagy is not rebooted, all ports remain in an off-hook condition.

---

7. When the restore is complete, press **Y** to reboot Stratagy. The Stratagy Admin PC returns to the **C:\VSA3** DOS prompt. When the Stratagy status light becomes a solid green, Stratagy is operational.

Note You cannot reconnect to IVP8 using Stratagy Admin until the IVP8 status light is green. Any attempt prior to that time fails.

Upgrade Stratagy Software

Notes

- Make a copy of the new software disks as a backup. Destination disks should be scanned first for viruses and the new disks write protected after the copies are made.
- It is recommended that you back up any database prior to starting any upgrade procedure.
- Loading the Stratagy Admin software can be done before/after connecting the Stratagy Admin PC to the Stratagy.

To upgrade Stratagy system software, you need the correct set of upgrade disk(s).

CAUTION! Because of possible errors that can be induced through the telephone network, Toshiba advises that you perform the Upgrade Utility on site.

---

1. From the Tools menu, press **3**. The Upgrade screen displays (shown at right).
2. Place the upgrade disk into the Stratagy Admin PC's floppy disk drive.
3. The default directory is **A:**. If your Stratagy Admin PC uses a different drive, type over the default. Press **Enter**.

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4. When the upgrade procedure is complete, press any key. The Stratagy Admin PC returns to the DOS prompt.

Note You cannot reconnect to IVP8 using Stratagy Admin until the IVP8 status light is green. Any attempt prior to that time fails.

Retrieve Trace File

This function copies the trace data log file (TRACE.OUT) to the Stratagy Admin PC's hard drive. As part of this function, a new Trace Filter Setup screen (see Figure 11-1 on page 11-8) enables you to specify the filtering rules for selecting the desired trace records.

After Stratagy Admin filters the trace data, it decodes and expands the data into records containing the information requested by you in the Trace Filter Setup screen.

Note The size of the trace file can be set using the *trace_cap* parameter in the install.cfg file of Stratagy (see "trace_cap" on page 4-27 for a description of the parameter)

1. From the Tools menu, press **7**.
2. The trace file name defaults to **TRACE.OUT**. From the Retrieve Trace File screen (shown at right), press **Enter**.
3. Enter the directory where you want to copy the file. The default is: **C:\xxxx**.

   If you need a different directory, type over the default. Press **Enter**. Be sure to enter the complete path. If the directory already exists, you are given the option of entering a new directory or overwriting the file. The Trace Filter Setup screen displays (see Figure 11-1 on page 11-8).
4. Select the items you want included in the **TRACE.OUT** file. Refer to the field descriptions on page 11-8.
5. When you are finished, press **Alt**+**e**.

   Once the data has been expanded, Stratagy copies the file to the directory/file specified in Step 3 of this procedure. A dialog status box displays (shown at right).

   When the copy is complete, another status box displays (shown at right):

   You can use any text editor to review the file.

Trace Filter Setup Screen

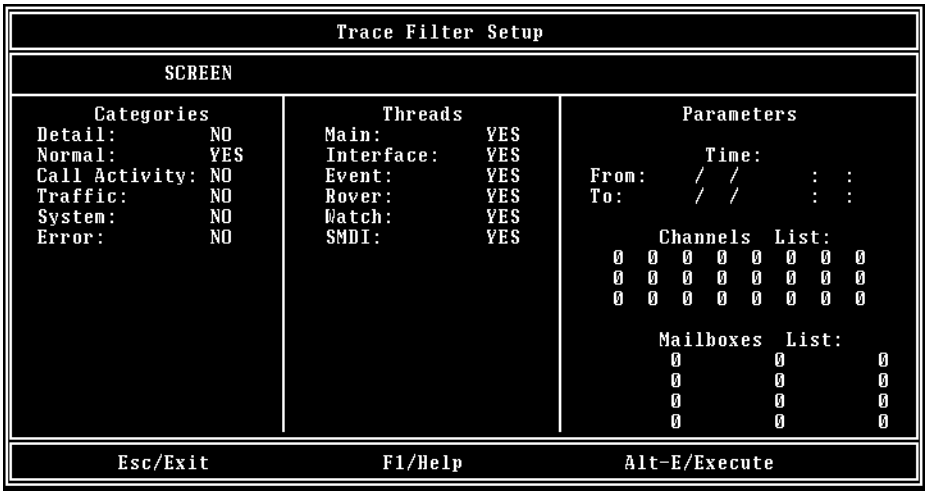


Figure 11-2 Trace Filter Setup Screen with System Defaults

The following fields appear on the screen:

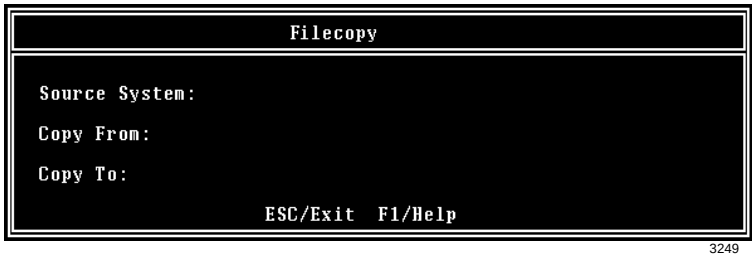
Categories Categories/classes of the traced records. Use the spacebar to toggle between Yes for inclusion of data or No for exclusion.	
Detail	Detail system information. **Note** Since this information is very detailed and complex, it is only useful for advanced technical personnel trying to debug the system.
Normal	General system activities including digits dialed and boxes executed.
Call Activity	Log ins, log outs, messages received, and messages retrieved.
Traffic	Information concerning system load and possible problems caused by the load.
System	Control flow between functions.
Error	Abnormal conditions, faults, exceptions, etc.
Threads Program processes. Use the spacebar to toggle between Yes for inclusion of data or No for exclusion.	
Main	System messages and trace events relating to the overall system.
Interface	Communication protocol between the Stratagy and Stratagy Admin.
Event	Anything that happens to the Stratagy from outside the system (e.g., detects voice, dial tones, ringing, etc.).
Rover	Actions that the Stratagy takes (e.g., notifications and internal scheduling).
Watch	Timers, system self-monitoring.
SMDI	SMDI information.

Parameters Limiting factors (date/time range, channel information, mailbox information).	
Time From	Starting date and time for trace data. Enter in dd/mm/yy hh:mm:ss format.
Time To	Ending date and time for trace data. Enter in dd/mm/yy hh:mm:ss format.
Channels List	Channel numbers. When no numbers are entered, all channels are included in the output.
Mailboxes List	When this parameter is used, only mailbox activities (log in, log out, message delivery, pickup, message delete, etc.) are displayed in the trace output. This option is useful when only mailbox activities need to be monitored.

Filecopy

Use Stratagy Admin's Filecopy option to copy files to and from the flash memory of the Stratagy and the Stratagy Admin PC's hard drive.

1. From the Tools menu, press **8**. The Filecopy screen displays (shown right).



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2. In the *Source System* field (where the file currently resides), press **F2** to display a pop-up box of selections.
3. Highlight **PC** to copy from the Stratagy Admin PC or **Stratagy** to copy from the Stratagy. Press **Enter**.
4. In the *Copy From* field, type the directory name, if necessary, and the file name.

Note If a directory name is not entered, Filecopy searches the Stratagy or Stratagy Admin directory (Stratagy Admin PC) for the file to be copied.

5. Press **Enter** when finished.
6. In the *Copy To* field, type the directory name, if necessary, and the file name.

Note If a directory name is not entered, Filecopy assigns the destination for the file to the Stratagy or Stratagy Admin directory.

7. Press **Enter** when finished. While Stratagy copies the file, a dialog status box displays (shown at right).

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When the copy is complete, this status box displays (shown right):

3254

8. Press any key to continue.

Upgrading Stratagy Voice Ports

Upgrading the number of voice ports on the Stratagy does not require any hardware. Please call Customer Service with the following information:

- Dealer Name and Number
- Order Number
- Dealer Contact and telephone number
- Site telephone number
- Stratagy's modem telephone number, if different from the site telephone number
- Stratagy system's password
- Stratagy system serial number

The port upgrade is activated by Toshiba remotely.

Note The Stratagy must be reset for the new ports to be activated.

Troubleshooting

This section discusses procedures to identify and correct faults within the Stratagy Voice Processing system. Once faults are identified, it may be necessary to replace hardware components or make alterations, such as upgrades or configuration modifications, to the software of the system.

- **Automatic System Recovery** – This feature controls the startup procedure in case a problem is detected during the restart process.

This section also covers the following diagnostic programs available in the Stratagy to assist in maintaining the integrity of the product:

- **Diagnostics** – Stratagy has powerful troubleshooting tools. The following three files assist you in determining the source of a problem:
  - TRACE.OUT logs the Stratagy's activity.
  - STRATAGY.LOG contains information on how many channels (ports) the system started up with and the CKDB execution summary (tells you basically that all of your messages have a home), etc.
  - MSG.LOG logs all messages received and every mailbox that checks for messages along with the DMTF entered.

  In addition to these files, Stratagy has a Scandisk utility that detects, diagnoses, and repairs disk errors on uncompressed drives.

Determine Problem

Resolving problems will be much easier if you consider the following:

- If you cannot start Flash, make sure that you have attached the power cord.
- Check that all connecting cables are correctly and firmly attached. Loose cables can cause erroneous or intermittent signals. You may need to inspect the cables for loose wires and connectors for loose pins.
- If a problem occurs while Stratagy is functioning, document as much information concerning what is happening as possible. Once the information is obtained, shut the system down to prevent any extensive file corruption.

- Remember to document what is happening. Write down what the system is doing and what actions you took, if any, immediately prior to and after the problem.
- Consider the simplest solution first. Ask yourself logical questions and consider the alternatives.
  - Which part of the system is operating erratically?
  - Can you connect with Stratagy Admin? Do you see any messages or random characters?
  - Do any of the indicator LEDs glow? Which ones? Do they stay on or do they blink?
  - Do you hear any beeps? How many? Are they long or short? Is the system making any unusual noises?
- Isolate the problem. Disconnect any peripheral equipment that may be connected to the COM or parallel ports.Temporarily remove the programming PC to see if it is causing the problem. You can connect a telephone port into a Stratagy voice port to verify operation when the Remote terminal is not connected.
- Make sure you are operating under the specified environmental conditions. These points serve as a guide. They are not definitive problem solving techniques. Some problems require the assistance of Toshiba Technical Support, but before you call, make sure of all the facts surrounding the problem.

Initial Power Up

Before beginning to do any detailed troubleshooting, take a moment and refer back to the installation section of this manual (see Chapter 2 – Installation) to make sure that all the appropriate steps have been taken for a proper installation.

Power up the system.

Table 11-1 Troubleshooting Tips

Problem Description	Possible Explanation
No activity. No LEDs, no beeps, no display, no sound.	• No incoming power. • Bad power cable • Bad power supply
System seems to boot up. LEDs glow, system beeps, but no display. **Note** Before considering part failure, take a moment and plug an analog port into Stratagy's voice port to see if it answers a call.	• Bad motherboard • Other major hardware failure (Stratagy replacement recommended) • Problem with Stratagy Admin software • Bad cable from Remote PC to Stratagy • Problem with COM port used for Remote
View boot sequence over COM port using a communications software such as HyperTerminal. Stratagy begins to boot up with a display, but does not reach Stratagy Main menu screen.	Note failure on screen: • CMOS failure • Memory failure • Flash drive failure Bad flash drive
System boots up to the Main menu, but does not answer.	• Wrong analog port being used. • Bad analog port from phone system. • Bad line cord.

Stratagy Diagnostic Utilities

Stratagy has several very powerful troubleshooting tools—TRACE.OUT, STRATAGY.LOG, and MSG.LOG. All three of these files are stored in the Stratagy directory and are best utilized in combination with each other. For example, if you are looking for actions related to a specific message, enable MSG.LOG and start a trace. If you think you have a site with a power problem, viewing STRATAGY.LOG and TRACE.OUT would be the best course of action.

In addition to these files, Stratagy has a Scandisk utility that detects, diagnoses, and repairs disk errors on uncompressed drives.

Trace

Trace is a diagnostic tool designed to assist you in troubleshooting Stratagy's activity. When Trace is enabled, it is automatically turned on when Stratagy loads up and logs data until Stratagy software is shut down.

The Stratagy stores the trace data in a text file called TRACE.OUT. The size of the trace file can be configured using the *trace_cap* parameter (see "System Parameters" on page 4-14). This parameter defines the size of the trace file in kilobytes. When the size of the trace file reaches the setting limit, the existing file is overwritten, beginning with the oldest record.

To copy the TRACE.OUT file to the Stratagy Admin PC's hard drive, use the Retrieve Trace File option on the Tools menu (see "Retrieve Trace File" on page 11-7).

➤ To enable TRACE.OUT

1. From the Main Menu, press **`Alt`**+**`s`** to select the shutdown function. Stratagy asks for the password.
2. Enter the password (the default is **`Stratagy`**) and press **`Enter`**.
3. From the Shutdown Menu, highlight Shutdown and Trace CURRENT Version option. Press **`Enter`**. A dialog box displays asking you to confirm the shutdown.
4. Press **`Y`** to continue. Stratagy shuts down, then restarts in Trace mode. Trace runs continuously until Stratagy is shut down. The DOS prompt displays on the Stratagy Admin PC.
5. (Optional) Restart Stratagy Admin.

STRATAGY.LOG

Stratagy contains a file named STRATAGY.LOG that is written to every time the Stratagy system is properly shut down and successfully boots up. If a Stratagy system is turned off without a proper shutdown, there may be file corruption. A startup without a shutdown preceding it in the STRATAGY.LOG is the first indication.

Some of the information contained in this file is how many channels (ports) the system started up with and the CKDB execution summary, which tells you basically that all of your messages have a home.

➤ To copy STRATAGY.LOG

1. From the Tools menu, press **`8`**. The Filecopy screen displays (see page 11-9 for details).
2. Using the Filecopy option, copy the STRATAGY.LOG file to the Stratagy Admin PC's hard drive. You can view it using any common text editor.

MSG.LOG

If you need to check actions related to specific types of messaging, you can enable MSG.LOG in the System Configuration file. In this file, Stratagy logs every message received and every mailbox that checks for messages along with the DTMF entered.

Important! *Since the MSG.LOG file continuously collects information, we recommend that you do not enable the file unless you are looking for specific information. Otherwise, the file takes up space in the flash memory that could be used for message storage.*

➤ To enable MSG.LOG

1. From the Tools menu, press **6**. The system configuration file displays. The parameters are listed in alphabetical order.
2. Enable the *msg_log* parameter by removing the **#** sign in the string:

   #set msg_log 'MSG.LOG'

   See Chapter 4 – Configure Stratagy for instructions.
3. Press **ESC**. The Stratagy System Config screen displays.
4. From the Stratagy System Config screen, press **1** to save your changes. Stratagy Admin transmits the file to the Stratagy.
5. When complete, press any key to continue. The system starts logging the information to the MSG.LOG file. The DOS prompt displays.
6. (Optional) Restart Stratagy Admin.

➤ To copy MSG.LOG

1. From the Tools menu, press **8**. The Filecopy screen displays (see page 11-9 for details).
2. Using the Filecopy option, copy the STRATAGY.LOG file to the Stratagy Admin PC's hard drive. You can view it using any common text editor.

ScanDisk

ScanDisk is a utility that detects, diagnoses, and repairs disk errors on uncompressed drives. ScanDisk repairs file system (e.g., crosslinks and lost clusters) errors.

➤ To perform ScanDisk

1. From the Main Menu, press **Alt**+**s** to select the shutdown function. Stratagy asks for the password.
2. Enter the password (the default is **Stratagy**) and press **Enter**. The Shutdown Menu displays.
3. From the Shutdown Menu, highlight Shutdown SCANDISK, and Restart option. Press **Enter**. A dialog box displays asking you to confirm the shutdown.
4. Press **Y** to continue. Stratagy shuts down and performs ScanDisk. If crosslinked files or lost clusters are found, ScanDisk automatically fixes the bad files and stores them as .chk files in the root directory. When the process is complete, Stratagy automatically reboots.

Automatic System Recovery

This feature is controlled by two parameters in the Stratagy System Configuration file, *restore_original* and *restore_config.* The parameters default to TRUE and enable the Stratagy to create an Archive directory (**`c:\Stratagy\Archive`**).

The directory contains copies of the files used for system startup (i.e., Stratagy batch and configuration files, and mailbox database) and is divided into three subdirectories: Original, Good and Suspect.

When the Stratagy system software is first installed, a copy of the files are automatically stored in an Archive subdirectory named Original. Each time you restart the system successfully, the files automatically write to an Archive subdirectory named Good, thereby saving the most up-to-date database changes.

If an unsuccessful startup is detected by the program, the system copies the problem files to an Archive subdirectory named Suspect and restarts using the files in the Good subdirectory. The Suspect files can be used for debugging purposes.

To receive notification of the unsuccessful startup, a new *error_box* parameter enables you to designate an User ID Mailbox to receive the message. The Notify menu for the mailbox can be set for a new “Panic” notification type.

Checklists/Forms A

This appendix provides surveys, checklists and forms to assist you in the installation of the Stratagy systems.

Survey/Checklists

- Pre-installation Company Survey
- Stratagy Pre-installation Checklist
- Stratagy Installation Checklist

Forms

- Users Form
- Auto (Scheduling) Form
- Notify Form
- Greeting Scripts Form

Make copies as needed.

Pre-installation Company Survey

Company	
Number of employees	
Number of employees using mailboxes	
Number of locations	
Telephone System (to which you will connect Flash)	
Manufacturer, model, and software release	
Voice mail integration capabilities	
Types of Hunt Groups for single-line stations	
Number of Central Office lines	
Number of single line stations	
Auto Attendant Information	
Number of companies using the system	
Whether it is the primary answering position and how many Central Office lines will be answered by Stratagy	
Company greetings and instructions	
Menus (sales, service, etc.)	
Voice Mail Information	
Number of employees requiring voice mailboxes	
Message waiting lights	
Notification requirements	
Directory requirements	
AMIS Information	
Whether two or more voice messaging systems need to exchange messages	

Pre-installation Checklist

Done ✔		Item
		Know the Reference Documentation
		(See Chapter 2 – Installation.)
❑	1.	Know Stratagy's features.
❑	2.	Know Stratagy operation, customization, and administration.
❑	3.	Know Stratagy installation.
❑	4.	Know how to configure the voice mail system settings for your telephone system.
		Conduct the Pre-installation Company Survey
		(See "Pre-installation Company Survey" on page A-2.)
❑	1.	Conduct the Pre-installation survey.
		Determine Stratagy's Configuration and Integration
		(See Chapter 2 – Installation and Chapter 4 – Configure Stratagy.)
❑	1.	Define Stratagy system configuration options.
❑	2.	Define system integration options.
		Customize User ID Mailboxes and Call Processing
❑	1.	Determine the company greeting.
❑	2.	Determine the caller instructions.
❑	3.	Obtain the busy-hold music (optional).
❑	4.	Determine the employee directory instructions.
❑	5.	Program the User IDs.
		Select and Prepare the Hardware Sites
		(See "Flash" on page 2-7.)
❑	1.	Stratagy system.
❑	2.	Remote or local system.

Installation Checklist

Done ✔		Item
		Install the Hardware
		(See Chapter 2 – Installation, Chapter 3 – Access and Use Stratagy.)
❑	1.	Inspect and unpack the system.
❑	2.	Install Stratagy voice boards (as appropriate).
❑	3.	Set up the Stratagy system PC hardware.
❑	4.	Power up Stratagy and verify Stratagy's basic functions.
❑	5.	Configure your telephone system's voice mail system settings individually (as appropriate).
❑	6.	Connect line cords from the voice boards to the telephone system.
❑	7.	Install the modem for remote maintenance.
❑	8.	Prepare (hardware and software) the remote or local system to access the Stratagy host system.
❑	9.	Access Stratagy.
		Configure Stratagy Using the Stratagy Configuration Utility
		(See Chapter 4 – Configure Stratagy, "Backup Utility" on page 11-3 and "Restore Utility" on page 11-5.)
❑	1.	Define Stratagy system configuration options.
❑	2.	Define Stratagy integration options.
		For a Toshiba telephone system, selected the appropriate system.
		For a non-Toshiba telephone system, define:
		❑ Telephone system dial codes.
		❑ Telephone system tone patterns.
		❑ System integration options.
❑	3.	Back up Stratagy using the Stratagy Backup Utility.
		Customize User ID Mailboxes and Call Processing
❑	1.	Record the company greeting.
❑	2.	Record the caller instructions.
❑	3.	Record the busy-hold music (optional).
❑	4.	Record the employee directory instructions.
❑	5.	Program the User ID mailboxes.
❑	6.	Back up Stratagy using the Stratagy Backup Utility.

Users Form

User ID _____ *Copy as needed*

```
  User ID: _____                    Comment: _____
Extension: _____
Directory Name 1: _____  Directory Name 2: _____
   Security Code: _____
```

Options

```
Basic Options:
   Maximum Rings: ___ (default is 4) Current Greeting: _____  Max: _____ sec
  Do Not Disturb: ___  Lock: _____      Busy Greeting: _____  Max: _____ sec
    Screen Calls: ___  Lock: _____          ID Call ?: _____     Busy Hold : _____
  Store Messages: ___  Max: _____ sec  Play Date/Time?: _____     Slow Menu : _____
 Copy Message To: ___                    Record Name?: _____ Saved Msg Que : _____
  Message Volume: ___ Guests: _____    Message Order : _____    Caller Menu: _____
 Message Pending: ___                  Alternate Rate: _____  Use At Login : _____
Amis Options: _____ Gateway Box: _____  AmisSysNumber: _____
```

Group/Chains

```
Chains:                              Groups:
      Chain Done: _____                    Group1: _____
      Chain RNA : _____                    Group2: _____
      Chain Busy: _____                    Group3: _____
     Chain Delay: _____                    Group4: _____

Menus:
                1: _____      2: _____      3: _____
                4: _____      5: _____      6: _____
                7: _____      8: _____      9: _____
                              0: _____
```

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Does this User ID also have:

Auto Form:	Yes	No
Notify Form:	Yes	No
Greeting Scripts Form:	Yes	No

Auto (Scheduling) Form

ser ID ____________ *Copy as needed*

```
Enabled      Change On:____________  At ____:____     Restrict To: M T W T F S S
________     And Every:____ month(s)____ day(s)                    _ _ _ _ _ _ _
                        hour(s) ____ minute(s)   Next Change:
Extension: ____________________________________________________________________
Rings:_______ Do Not Disturb:_______     Call Screening:_______   Greeting #:____
```

```
Enabled      Change On:____________  At ____:____     Restrict To: M T W T F S S
________     And Every:____ month(s)____ day(s)                    _ _ _ _ _ _ _
                        hour(s) ____ minute(s)   Next Change:
Extension: ____________________________________________________________________
Rings:_______ Do Not Disturb:_______     Call Screening:_______   Greeting #:____
```

```
Enabled      Change On:____________  At ____:____     Restrict To: M T W T F S S
________     And Every:____ month(s)____ day(s)                    _ _ _ _ _ _ _
                        hour(s) ____ minute(s)   Next Change:
Extension: ____________________________________________________________________
Rings:_______ Do Not Disturb:_______     Call Screening:_______   Greeting #:____
```

```
Enabled      Change On:____________  At ____:____     Restrict To: M T W T F S S
________     And Every:____ month(s)____ day(s)                    _ _ _ _ _ _ _
                        hour(s) ____ minute(s)   Next Change:
Extension: ____________________________________________________________________
Rings:_______ Do Not Disturb:_______     Call Screening:_______   Greeting #:____
```

```
Enabled      Change On:____________  At ____:____     Restrict To: M T W T F S S
________     And Every:____ month(s)____ day(s)                    _ _ _ _ _ _ _
                        hour(s) ____ minute(s)   Next Change:
Extension: ____________________________________________________________________
Rings:_______ Do Not Disturb:_______     Call Screening:_______   Greeting #:____
```

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Notify Form

User ID ____________ *Copy as needed*

Enabled	M T W T F S S	From	To	Notify After	Continue Every	Max Times
______	_ _ _ _ _ _ _	__:__	__:__	______min	______min	______

Title: ____________ Type: ________ Variable: ________

Method: ______________________________

Enabled	M T W T F S S	From	To	Notify After	Continue Every	Max Times
______	_ _ _ _ _ _ _	__:__	__:__	______min	______min	______

Title: ____________ Type: ________ Variable: ________

Method: ______________________________

Enabled	M T W T F S S	From	To	Notify After	Continue Every	Max Times
______	_ _ _ _ _ _ _	__:__	__:__	______min	______min	______

Title: ____________ Type: ________ Variable: ________

Method: ______________________________

Enabled	M T W T F S S	From	To	Notify After	Continue Every	Max Times
______	_ _ _ _ _ _ _	__:__	__:__	______min	______min	______

Title: ____________ Type: ________ Variable: ________

Method: ______________________________

Enabled	M T W T F S S	From	To	Notify After	Continue Every	Max Times
______	_ _ _ _ _ _ _	__:__	__:__	______min	______min	______

Title: ____________ Type: ________ Variable: ________

Method: ______________________________

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Greeting Scripts Form

User ID _____ *Copy as needed*

Greeting 1	
Greeting 2	
Greeting 3	
Greeting 4	
Greeting 5	
Greeting 6	
Greeting 7	

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Special Greeting User ID Mailboxes B

Stratagy contains four special greeting User ID mailboxes:

- Initial Greeting Mailboxes
  - Company Greeting
    The salutation that lets the caller know which company he called. Default is User ID 990.
  - Caller Instructions
    Gives the caller options for reaching departments or information. Default is User ID 991.
- Directory Mailbox
  The caller enters the first few letters of the name of the person he/she wants to contact. Stratagy plays the corresponding User ID's name recording. Default is User ID 411.
- Operator Mailbox Greeting
  For an after hours caller who is unable to direct his own call or does not know the extension of the person he/she wants to reach. Default is User ID 0.

When initially setting up the system, you need to define each of the special greeting mailboxes. This includes recording the greetings and customizing the User ID mailbox (e.g., using the Auto (Scheduling) Menu to schedule greetings).

You can modify these greetings and customizations as needed. This appendix discusses all four greetings and how to record them.

Use the forms in Appendix A – Checklists/Forms as an aid in defining each of the special greeting mailboxes. For detailed information about customization, see Chapter 6 – Menus and Chapter 8 – Customization Examples.

Record Mailbox Greetings

Note For more details on recording greetings, see the *Stratagy User Guide*.

1. Enter Stratagy's extension. Stratagy answers.
2. Press ✱ + the User ID mailbox number.
3. Enter your security code + **#**.
4. From the Main menu, press **3**. The Manage Mailbox menu plays.
5. Press **1**. The Change Your Greeting menu plays.
6. Enter the personal greeting number you want to change or add (**1**~**7**).
7. Press **2** to select Record Greeting option. You are prompted to record your greeting. Speak slowly and clearly.
8. Press **#** when done.

9. (Optional) After recording, you can press:

1	Review recording	The complete greeting plays.
2	Re-record	Press **#** when done.The system prompts you to record at the beep.
3	Append recording	Press **#** when done. Appending a greeting enables you to add information to the end of your already recorded greeting. The system prompts you to record at the beep.
4	Cancel recording	The greeting is canceled. The system returns to the previous menu.
9	Save recording	Stratagy tells you that greeting (number) has been recorded and returns to the previous menu. Again, you are given the option to review or record over the greeting you have just recorded.

10. Press **9** to return to the previous menu. You are given the option to record another greeting.
11. Press **1** and select another greeting number (**1**~**7**).
12. Repeat Step 7 on page B-1.

Important! *The last greeting selected or recorded is the greeting that callers hear as your User ID greeting.*

13. To return to the Main Menu, press **999**. Stratagy plays the Main Menu options.

Initial Greeting Mailboxes

The initial greeting mailboxes are the Company Greeting and Caller Instructions. Stratagy ships with these defined as User ID 990 and User ID 991, respectively.

You can schedule different initial greetings to play different times of the day or days of the week, or even a specific day of the year.

See Chapter 5 – How Stratagy Operates for details about how Stratagy processes incoming calls. If you need to change the initial greeting defaults for specific channel ports, use the Stratagy Configuration Utility (see Chapter 4 – Configure Stratagy.)

Company Greeting

When a caller first reaches Stratagy, it plays the company greeting. Typically this salutation gives the caller the company name (for example, “Thank you for calling…”). Stratagy then plays the caller instructions.

You can record up to seven greetings that you can schedule to play as needed.

➤ **To record the Company Greeting**

1. Access Stratagy from your telephone using default User ID: 990 and Security Code: 990997.
2. Record the greeting (see “Record Mailbox Greetings” on page B-1).

Note Change the security code as soon as possible.

➤ **To customize the Company Greeting User ID mailbox**

1. From the Main Menu, press **Alt+U** to access the Users Menu.

Note Company Greeting User ID mailbox 990 chains to Caller Instructions User ID mailbox 991.

2. Use the Auto Menu to schedule the greetings to play as needed.

For detailed information about customization, see Chapter 6 – Menus and Chapter 8 – Customization Examples.

Caller Instructions

By default, Stratagy plays the caller instructions directly after the company greeting. In addition, Stratagy plays the caller instructions whenever it has nowhere else defined to continue processing.

Typically, caller instructions give the caller options for reaching departments or information. Providing this information is important to help process the call.

> "To reach the person you are calling, enter their extension number. To reach the Operator, press 0 or stay on the line."

You can record up to seven greetings (caller instructions) that you can schedule to play as needed.

➤ **To record the Caller Instructions**

1. Access Stratagy from your telephone using default User ID: 991 and Security Code: 991997.

Note Change the security code as soon as possible.

2. Record the caller instructions (see "Record Mailbox Greetings" on page B-1).

➤ **To customize the Caller Instructions User ID mailbox**

1. From the Main Menu, press **`Alt+U`** to access the Users Menu.
2. Use the Auto Menu to schedule the greetings to play as needed.

For detailed information about customization, see Chapter 6 – Menus and Chapter 8 – Customization Examples.

Sample Initial Greetings

The following sample greetings play as a result of chaining the Company Greeting User ID mailbox (990) to the Caller Instructions User ID mailbox (991).

Example 1
990 Thank you for calling (company name). 991 To reach the person you are calling, enter his extension. For information about our company products and services, press 1. For customer support, press 2. For sales, press 3. To access the employee directory, enter 411. To reach the Operator, press 0 or stay on the line.
Example 2
990 Good afternoon. Thank you for calling (company name). 991 If you know the extension of the person you are calling, you may enter it now. Otherwise, press 0 or stay on the line for Operator assistance.
Example 3
990 Thank you for calling (company name). 991 Sorry, our offices are closed. To leave a message in our Operator's mailbox, press 0. Or call during regular business hours – 8:00 to 5:00 Monday through Friday.
Example 4
990 Thank you for calling (company name). 991 Our offices are closed July 4th to celebrate Independence Day. Please call back during regular business hours.

Directory Mailbox

Stratagy ships with User ID 411 predefined as the access box for the directory. The User ID and port number for the directory can be specified using the Stratagy system configuration parameter *box_idx* (Chapter 4 – Configure Stratagy).

When a caller uses the directory, he/she enters the first few letters of the name of the person he/she wants to contact. When Stratagy makes a match using the Users Menu *Directory Name* fields, it plays the User ID's name recording.

Depending upon how the directory search feature is configured using the Stratagy system configuration parameter *dir_play_uid* (Chapter 4 – Configure Stratagy), Stratagy also plays the User ID digits. If a user has not recorded a name, Stratagy either does not play the entry or plays the User ID's digits. Stratagy plays the first match to the caller. The caller can select this directory name (and/or User ID) or choose to hear the next match.

How Stratagy Maintains the Directory

Stratagy automatically maintains the directory using:

- The names you create from the Users Menu *Directory Name 1* and *Directory Name 2* fields. To avoid having a User ID appear in the directory (default 411), leave these fields blank. Chapter 6 – Menus for details.
- Recordings made via telephone from Stratagy's User mode. See the *Stratagy User Guide* for details.

For example, Mary would translate to 6279 for access after a caller enters 411, while Jo Ann translates to 56266. When Stratagy matches a directory name after accessing 411, it plays that User ID's name recording. Therefore, it is important that users record their names, e.g., "Donna Smith."

If a user has not recorded a name, Stratagy either does not play the entry (default) or plays the User ID's digits. Stratagy plays the first match to the caller. The caller can select this directory name (and/or User ID) or choose to hear the next match.

Directory Instructions

The recording you make should be consistent with your customization of User IDs.

Notes

- Since the letters Q and Z do not appear on the telephone dial pad, you need to provide special directions to the caller. Stratagy translates Q to 7 and Z to 9.
- Stratagy ignores spaces and punctuation in a name.

➤ **To record the directory instructions**

1. Access Stratagy from your telephone using default User ID: 411 and Security Code: 411997.

Note Change the security code as soon as possible.

2. Record the instructions (see "Record Mailbox Greetings" on page B-1).

   The following is a sample directory greeting.

   > "Please enter the first few letters of the first or last name of the person you are calling. For the letter Q, use 7; and for the letter Z, use 9."

   Stratagy ships with an initial directory recording:

   > "Enter the first few letters of the first or last name of the person you wish to reach."

Operator Mailbox Greeting

The default for the Operator or general mailbox is User ID mailbox 0. Stratagy provides the Operator User ID mailbox for after hour callers who are unable to direct their own calls (rotary dial telephone) or do not know the extension of the party they want to reach.

When a caller accesses the Operator User ID mailbox, Stratagy plays its greeting which advises the caller on how the call is handled. The caller can then leave a message in the mailbox (which the Operator usually forwards on the next business day).

The greeting should cover the following information:

- Inform the caller that he has reached the Operator mailbox
- Remind the caller to leave his/her own name
- Remind the caller to state who the message is for
- State that the message will be delivered to the proper person

You can record up to seven greetings that you can schedule to play as needed.

➤ **To record the Operator Mailbox greeting**

1. Access Stratagy from your telephone using default User ID: 0 and Security Code: 0997.

Note Change the security code as soon as possible.

2. Record the greeting (see "Record Mailbox Greetings" on page B-1).

   The following is a typical Operator User ID mailbox greeting:

   "You have reached the Operator mailbox. Please leave a message at the tone. Your message will be forwarded on the next business morning."

➤ **To customize the Operator User ID mailbox greeting**

1. From the Main Menu, press **`Alt+U`** to access the Users Menu.
2. Use the Auto Menu to schedule the greetings to play as needed.

For detailed information about customization, see Chapter 6 – Menus and Chapter 8 – Customization Examples.

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