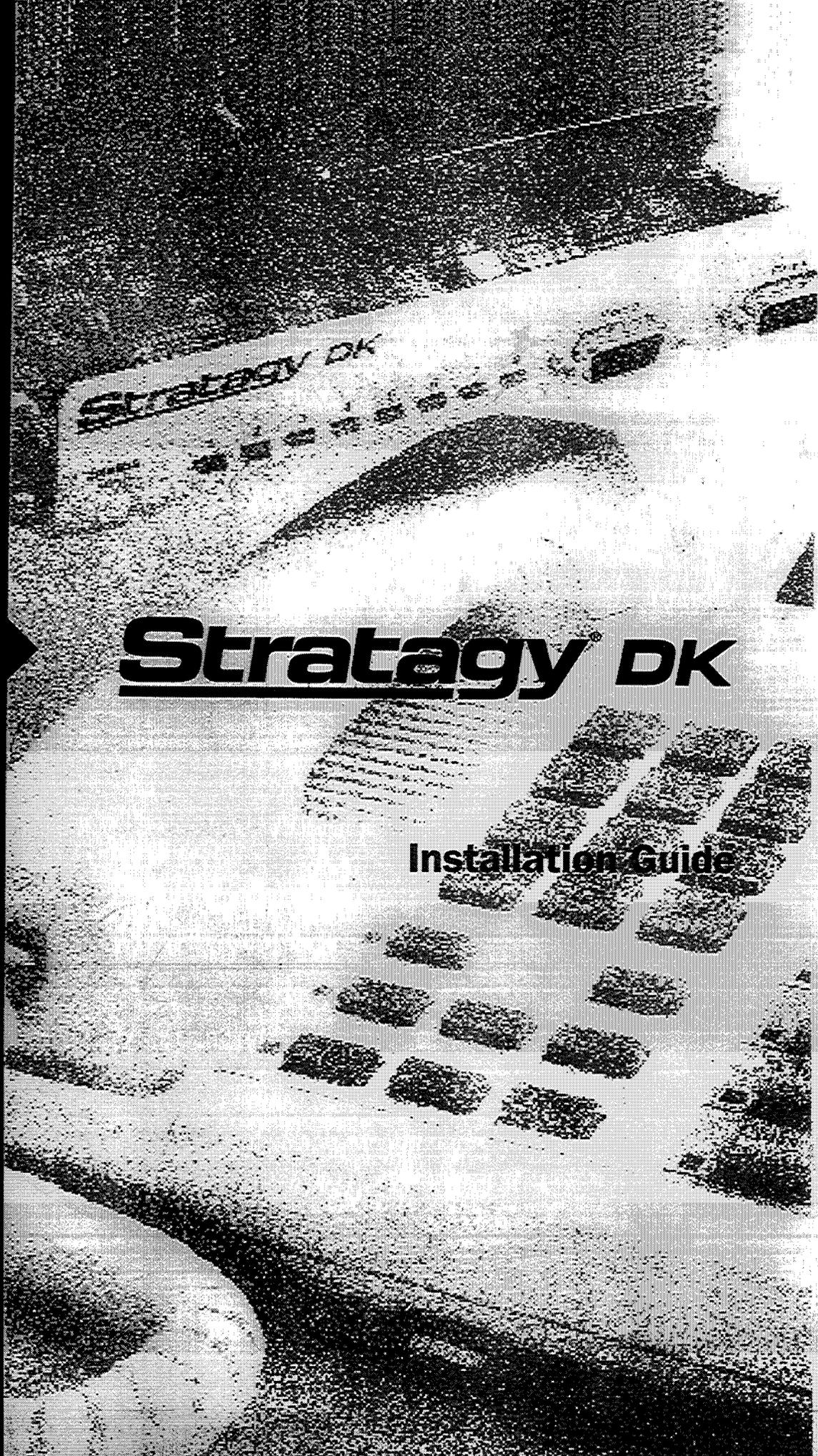


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# **Stratagy<sup>®</sup> DK**

**Installation Guide**



# Before You Start...

Get ready to install Toshiba's Strategy DK, one of the most efficient voice processing systems available! To make this installation go smoothly, before doing anything else, please read and complete both sides of this checklist:

## 1

Do you know how to handle Strategy DK?

*Handle it with loving care and it will last a long time.. .*

- Whenever handling Strategy DK, always wear the anti-static wrist strap (included); keep the strap by the unit. Always **hold** the unit by its edges. Remember that electrostatic charge from your body, even your own body oils can damage Strategy DK.
- Never drop or jar Strategy DK! The unit's hard drive is extremely sensitive to dropping or excessive force during installation.
- Temperature changes greater than **20°F** cause condensation on Strategy DK's hard drive. Wait 24 hours before installation if there is such a temperature variation.

## 2

Do you have everything you need?

*Need more details? They're inside the installation guide.*

- What comes shipped: Strategy DK comes complete with **pre-loaded** operating software, documentation package and the anti-static wrist strap. Make sure nothing is missing or damaged.
- Local Administration? You'll need a portable/desktop PC with **DOS 6.2**, **5MB** hard drive space, 3.5" 1.44 floppy drive, and 580KB free RAM. You'll need a **9-pin** null-modem serial cable or Toshiba's SG-ADMCBL cable to connect your PC to Strategy DK.
  - a Remote (modem) Administration? Use Strategy Admin software (up to 9600 baud) with Toshiba's SG-FMOD modem or a Hayes-compatible, 14.4 baud, **V32.bis** modem connected to Strategy DK's serial Port 2; don't forget the **9-pin** serial cable.
  - a You can also use Strategy DK's internal (soft) **2400-baud** modem and administrate through its phone connection.

## 3

Is Strata DK ready?

*See the Strata DK Installation/ Maintenance and Programming Manuals for details on a specific Strata DK product.*

- Make sure **Strategy** DK is compatible with your Strata DK: It **works** with all **DK424/DK280** and **DK16e/DK16** systems. It also works with **DK24/DK56/DK96** with Release 4 software.
- Always program Strata slot assignments before installing the Strategy DK. Use these slot assignments:
  - DK424:** 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.**
  - DK280:** use any universal slot, starting with slot 12 or slot 13 if an **RSIU** is in slot 11 (R3 or higher); never use slots 31 or 51.
  - DK16e/DK16:** use any expansion cabinet slot (except slot 18 in the **DK16e**) that takes an eight-port card.
  - DK24/ DK56/ DK96:** use any slot after slot 01.
- Be sure to set code 31 in Program 03 for the slot where Strategy DK will be installed.
- All Strata **DK's:** if receiving Calling Party Control (CPC) or Loop Open Disconnect from the CO, use Program 15 to enable.
- Always remember to shut down Strategy software before powering down Strata DK.

## 4

Is Strata **DK's** DTMF tone detection enabled?

- Strata DK needs to recognize Strategy DK's DTMF signaling.
- Make sure an RRCS is installed in the DK424/DK280, a K4RCU3 in the DK16e/DK16, or CRCU in the DK24/DK56/DK96.
- Run Program 03 and assign these code(s) where the DTMF receiver is installed:
  - DK424/DK280** (RRCS installed on the RCTU): code 92, 93, or 94 for slot 00.
  - DK16e** (K4RCU3): code 92 for slot 00.
  - DK24/DK56/DK96** (CRCU): code 92 or 93 for slot 00.

5

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

- Make sure a PDKU card is installed that is currently (or can be) programmed for a DSS Console.
  - DK424/DK280:** When installing Strategy DK 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.
  - 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.
- See the installation guide to program Strategy DK for this option.

## 6

Are you going to have **SMDI**?

- DK424/DK280:** SMDI is only available on a "B" processor or higher.
- Make sure a PIOUS/PIOU/RSSU/RSIU card is available.
- Set code 43 in Program 03 for PIOUS/PIOU/RSSU or code 49 for RSIU/RSIS.
  - a The PIOUS/PIOU/RSSU/RSIU card must be located close to the Strategy DK. Install a serial cable between the two.

## 7

Want to synchron. Strategy DK system time with Strata DK?

- You'll need an LCD telephone physically installed on Strata DK; make sure it's on the first port of the PDKU card (defined in Step 5 above).

## 8

All set?

Just a few more things...

- Don't forget to wear the anti-static wrist strap during handling.
- Be sure Strategy DK has a jumper installed on J4.
- If you are using an internal modem in the portable/desktop computer, remember that Strategy Admin only works with COM 1 and 2, not COM 3 or 4.
- Do not write over the Strategy Admin subdirectory on your remote PC when installing the Strategy Admin **VSA.2G** version you received. Always retain previous versions of Admin.
  - a Make sure your *Strata I&M/Programming Manuals* and *Strategy I&M Manuals* are handy. Be sure to read the entire installation guide 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!***

# Contents

## Strategy DK

What's New? .....	1
Internal Modem .....	1
Enhanced Strategy Admin Software .....	1
Parameters .....	2
Main Menu .....	2
Users Menu – Options Screen .....	4
Tokens .....	4
Features .....	4
Installation .....	5
Step 1: Read Through this Installation Guide First.....	5
Step 2: Program the Strata DK .....	5
Step 3: Shut Down the Strata DK .....	6
Step 4: Install the Strategy DK .....	6
Step 5: Verify Strategy DK is Functioning Properly .....	8
Step 6: Verify that Voice Playback, Basic Auto Attendant and Ports are Functioning Correctly .....	10
Step 7: Connect Portable/Desktop Computer to Strategy DK .....	10
Local Connection .....	10
Remote Connection .....	11
Step 8: Load Strategy Admin Software (VSA.2G) .....	11
Step 9: Configure Strategy Admin Software .....	12
Step 10: Access Strategy DK .....	14
Local Access .....	14
Remote Access .....	15
Step 11: Configure Strategy DK .....	16
Toshiba Plug and Play .....	17
Telephone System Configuration .....	18
Strategy System Configuration .....	19
Step 12: Program the Mailboxes .....	22
Step 13: Application Programming.....	23
Step 14: Strategy DK Maintenance .....	25
Tools .....	25
Trace Diagnostics .....	31
Upgrading Strategy DK Voice Ports .....	31
Step 15: Shut Down the Strategy DK .....	32

## Figures

Figure 1	Stratagy DK Hardware Components .....	.1
Figure 2	Navigating the Tools Menu .....	3
Figure 3	Stratagy DK424/DK280 PDKU DDD/Busy Lam Field Slot Assignment Examples .....	8
Figure 4	Stratagy DK .....	9
Figure 5	RS-232 DB9 to DB9 Cabling .....	10
Figure 6	RS-232 DB25 to DB25 Cabling .....	10
Figure 7	Main Menu with Sample Data .....	16
Figure 8	Options Screen with Sample Data .....	.23

## Tables

Table 1	Stratagy Admin Compatibility .....	2
Table 2	Stratagy DK Slot Assignment .....	7
Table 3	Stratagy DK Status/Port LEDs.....	9
Table 4	Admin PC Configuration Fields .....	13
Table 5	Stratagy DK System Configuration Parameters – Definitions and Settings ..	.20

# Strategy DK

The Strategy DK voice processing circuit card (see Figure 1 for a photograph) supports up to 8 ports, provides up to 24 hours of storage and is installed in the card slot of a Strata DK Base or Expansion Cabinet/KSU.

The supported systems and recommended software versions are:

- ◆ Strata DK424/DK280 — all releases
- ◆ Strata DK16e/DK16 — all releases
- ◆ Strata DK24/DK56/DK96 — Release 4

The Strategy DK requires Strategy Admin software, installed on a separate IBM-compatible portable/desktop computer, for local or remote administration and maintenance. With the release of the Strategy DK, a new enhanced version of Strategy Admin (VSA.2G) is available. This enhanced version provides new utilities, explained in detail later in this Guide, for configuring and maintaining the Strategy DK.

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



Figure 1 Strategy DK Hardware Components

## What's New?

### Internal Modem

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

### Enhanced Strategy Admin Software

With the release of the Strategy DK, a new version of Strategy Admin (VSA.2G) is available. This new version provides enhanced abilities for configuring and maintaining the

Strategy DK. Some versions of the Strategy Admin software are not compatible with the Strategy system software (see Table 1).

Table 1 Strategy Admin Compatibility

Strategy 4 Lite System Software Version	Compatible Strategy Admin Software Version
V4.2B	VSA.2C
V4.2E	VSA.2E, VSA.2G <sup>1</sup>

Strategy DK System Software Version	Compatible Strategy Admin Software Version
VDK.2G	VSA.2G

<sup>1</sup> Strategy 4 Lite V4.2E software does not support some of the utilities available in Admin VSA.2G's new menu selection called Tools (see Page 2). If ONLY performing mailbox programming on the Strategy 4 Lite (version V4.2E), Admin VSA.2G can be used. Total compatibility will be available with Strategy 4 Lite Release 3 software.

## Parameters

Because of the unique nature of the interaction process between the Strategy DK and Strata DK, four new parameters have been added for use exclusively with the Strategy DK (see Table 5 for the definitions and settings for these parameters).

- ◆ **console\_slot\_id**: designates the PDKU slot. Strategy uses this slot for DSS/LCD status.
- ◆ **dss\_active**: tells the Strategy DK to retrieve BLF busy station information for the assigned DSS Port field located on the Users Menu – Options screen (see Step 12 “Program the Mailboxes” on Page 22 for information on programming the field).
- ◆ **ksu\_time**: synchronizes Strategy DK's system clock with the system clock of the supporting Strata DK telephone system.
- ◆ **trace-cap**: defines the size of the trace file in kilobytes.

## Main Menu

Starting with VSA.2G Admin, the Main Menu has been changed to include a new menu selection, called Tools, and the time display (in the upper right corner of the menu) has an additional feature exclusive to the Strategy DK. The time display now indicates whether the Strategy DK is synchronized with the Strata DK KSU (KSU time) or is running on its own system clock (standard, daylight savings).

## Tools

Tools includes the following selections (see Figure 2):

- ◆ Backup Utility
- ◆ Upgrade Utility
- ◆ Toshiba Plug and Play
- ◆ Retrieve Trace File
- ◆ Restore Utility
- ◆ Telephone System Configuration
- ◆ Strategy System Configuration'
- ◆ Filecopy'

<sup>1</sup> Functions supported by the Strategy 4 Lite (V4.2E).

For complete details on Toshiba Plug and Play, Telephone System Configuration, and Strategy System Configuration, see Step 11 “Configure Strategy DK” on Page 16. For details on the remaining selections, see Step 14 “Strategy DK Maintenance” on Page 25.

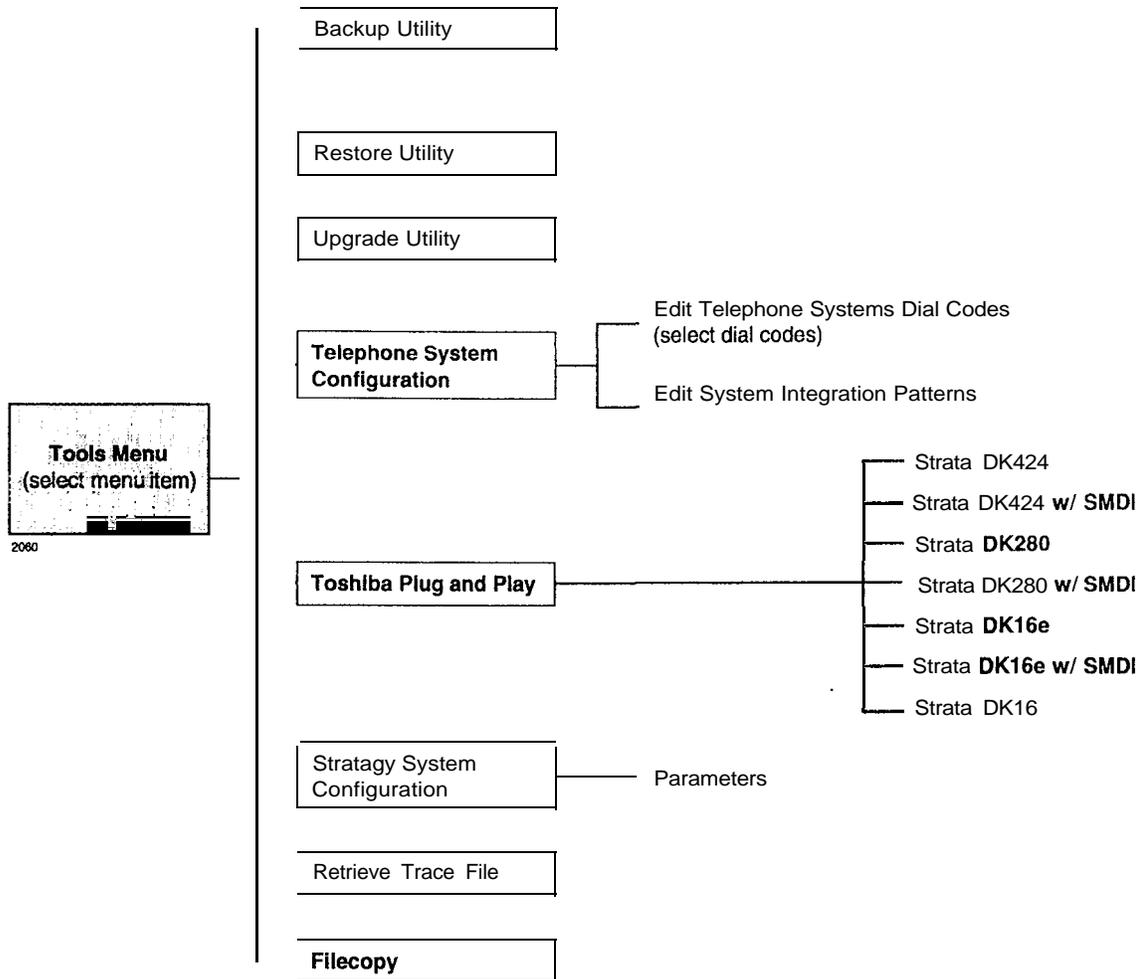


Figure 2 Navigating the Tools Menu

### Strategy DK System Time

Using the *ksu\_time* parameter, you can synchronize Strategy DK’s system clock with the system clock of the supporting Strata DK telephone system. Setting this parameter to true, disables the *daylight-saving-time* parameter. The Main Menu screen displays KSU time when this feature is enabled.

**Note** An LCD telephone must always be physically installed on the first port of the PDKU card (defined in *console-slot-id* parameter).

## Users Menu – Options Screen

You'll notice some changes in the User Menu – Options screen. The changes (see Figure 8) are:

- ◆ A new field called *DSS Port* has been added. This new field replaces the Alternate Rate feature, which is not available with the Strategy DK.
- ◆ The Message Volume feature, although displayed on the screen, is not supported by the Strategy DK.

### DSS Port

The *DSS Port* field corresponds to the “physical” port number of a Strata DK station. This field enables the Strategy DK to monitor the Busy Lamp field of a DSS console port to determine if the station is busy before attempting to transfer.

## Tokens

As with all Strategy systems the Strategy DK retains all of the robust application programming that is provided by tokens. Some new tokens are available exclusively for the Strategy DK. They are:

- ◆ KM -- Enables a portable/desktop computer's modem to communicate with the Strategy DK internal modem (2400 baud) by sending the call to User ID 993.
- ◆ KT( ) -- Directs calls to a designated User ID when:
  - ◆ DSS function is active (*dss\_active = true*)
  - ◆ DSS port is assigned in the “answering” mailbox
  - ◆ Night Transfer on the DSS console is ON.

## Features

### Busy Station Identification

The Busy Station Identification feature enables the Strategy DK to determine if a station is “busy” without performing a “hook-flash” and transfer. Strategy DK “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 Strategy DK (i.e., the Busy chain is executed).

To use this feature you must configure the new *console-slot-id* and *dss\_active* parameters, program the new *DSS Port* field (see Step 12 “Program the Mailboxes” on Page 22), and install/program a PDKU as the DSS console (see “DSS/Busy Lamp Feature” on Page 7).

**Important!** *Once the DSS/Busy Lamp feature has been programmed using the two parameters and the DSS Port field, Strategy DK 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.*

### Night Transfer Alternate Routing

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

## Limiting the Trace File Size

Trace is a diagnostic tool that is designed to assist you in troubleshooting Strategy's activity.

To log the trace data, you can use a text file called TRACE.OUT. The size of the trace file can be configured using the new *trace-cap* parameter, which 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.

# Installation

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

---

### CAUTION!

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 Strategy DK 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 DK cabinet. An electrostatic charge from your body can damage the hard drive or other circuitry permanently.
- *Hold the Strategy DK 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 1: Read Through this Installation Guide First

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

## Step 2: Program the Strata DK

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

To the Strata DK processor, the Strategy DK functions as an analog card (**RSTU**). Although there are some special program settings required for the Strategy DK (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 Stratagy DK.*

1. Using Program 03-Flexible PCB Slot Assignments set/verify the following slot assignments:
  - . Set code 31 for the slot where Stratagy DK is installed (see Step 4 ).
  - ◆ Enable the Strata DK to receive DTMF signalling from the Stratagy DK:
    - . For DK424/DK280: Set codes 92, 93, or 94 for slot 00 for the RRCS installed on the RCTU.
    - For DK16e/DK16: Set code 92 for slot 00 for the K4RCU3.
    - ◆ For DK24, DK56, DK96: Set codes 92 and 93 for CRCU.
    - Set code 64 for the slot where the PDKU resides. Stratagy DK will monitor this slot for the DSS/Busy Lamp feature (see “Busy Station Identification” on Page 4).

**Note** For DK16c/DK16: slot 11 in the Base Cabinet must be set for code 64.

- If SMDI is desired with the Strata 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 the Strata DK

- Turn off the main power switch to the Strata DK system.

### Step 4: install the Stratagy DK

---

**CAUTION!** See cautions under Step 1 on Page 5 before proceeding.

---

1. Locate the proper slot for the Stratagy DK (see Table 2).
2. Insert the card into the appropriate slot, and apply firm, even pressure to ensure proper mating of connectors. Do not hit the board for proper seating. This may damage the Stratagy DK components.

Table 2 Stratagy DK Slot Assignment

<b>IDK424</b>	
Note	<i>For the DSS/BLF feature, the Stratagy DK must reside in a higher-numbered slot than the PDKU card that the Stratagy DK will monitor (see Figure 3).</i>
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! <i>Do not install the Stratagy DK in slots 27, 28, 37, 37, 38, 47, 48, 57, 57, 58, 67, 68, 71, 77, or 78.</i>	
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.	
<b>DK280</b>	
<b>Important!</b> <i>The Stratagy DK does not function when installed in slots 31 or 51.</i>	
Note	For the DSS/BLF feature, the Stratagy DK must reside in a higher-numbered slot than the PDKU card that the Stratagy DK will monitor (see Figure 3)
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.	
<b>DK16e/DK16</b>	
Install the Stratagy DK in any slot in the Expansion KSU where an eight-port card can be inserted. For DK16e, see Tables 2-7-2-I 3 in Chapter 2 -- DK16e Configuration in the <i>StrataDK I&amp;M Manual</i> for all possible configurations.	
Important! <i>Do not install Stratagy DK in slot 78 of the DK1 6e.</i>	
A K4RCU3 must be installed in the Base KSU to enable end-to-end signaling	
Note	Putting a Stratagy DK into a StrataDK16/DK16e, eliminates eight telephone lines.
<b>DK24, DK56, DK96</b>	
Install the card in any slot after slot 01. A CRCU must be installed to enable end-to-end signaling.	
<b>DSS/Busy Lamp Feature</b>	
For the DSS/Busy Lamp feature to operate (see "Busy Station Identification" on Page 4 for detailed information), the Stratagy DK must monitor the DSS/BLF data from a specific PDKU card. The Strata DK telephone system restricts this capability to certain configurations:	
<ul style="list-style-type: none"> <li>◆ Stratagy DK cannot be installed in the first slot of any cabinet (i.e., 11-71)</li> <li>◆ The Stratagy DK can only monitor a PDKU that resides in an odd-numbered cabinet.</li> <li>◆ Stratagy DK must always be in a higher-numbered slot than the PDKU card, even if the PDKU is in another cabinet.</li> </ul>	
When Stratagy DK 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 <i>console-slot-id</i> parameter on Page 21). When the Stratagy DK 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 3 for examples.	

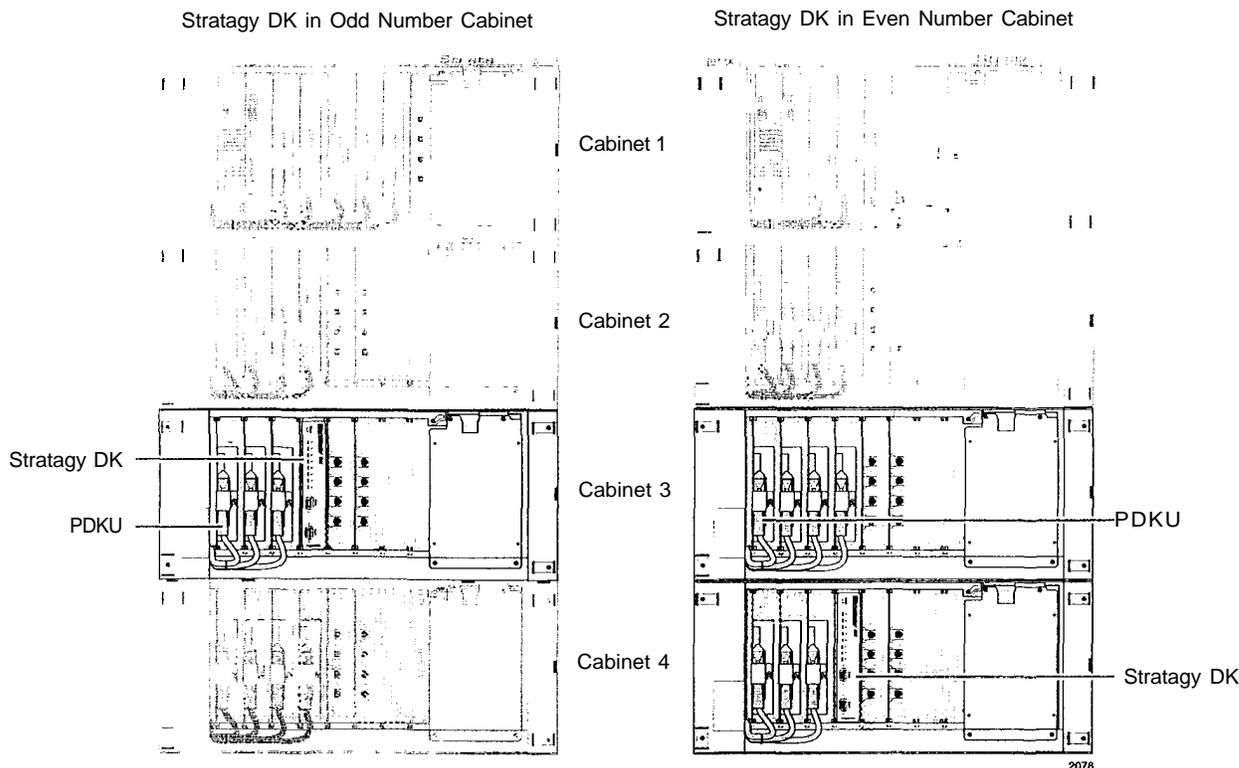


Figure 3 Strategy **DK424/DK280** PDKU **DSS/Busy** Lamp Field Slot **Assignment** Examples (console-slot-id configured as 0)

### Step 5: Verify Strategy DK is Functioning Properly

Note Each Strategy DK has been pre-programmed at the factory for out-of-box (plug and play) operation on the Strata DK280. This includes the integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions.

1. Turn on the main power switch to the Strata DK system and the Strategy DK performs a self test while booting-up.
2. Let it proceed without any action from you. During this process the status light is blinking amber and should turn solid **green** when finished (see Figure 4 and Table 3). The process should take approximately four to five minutes.

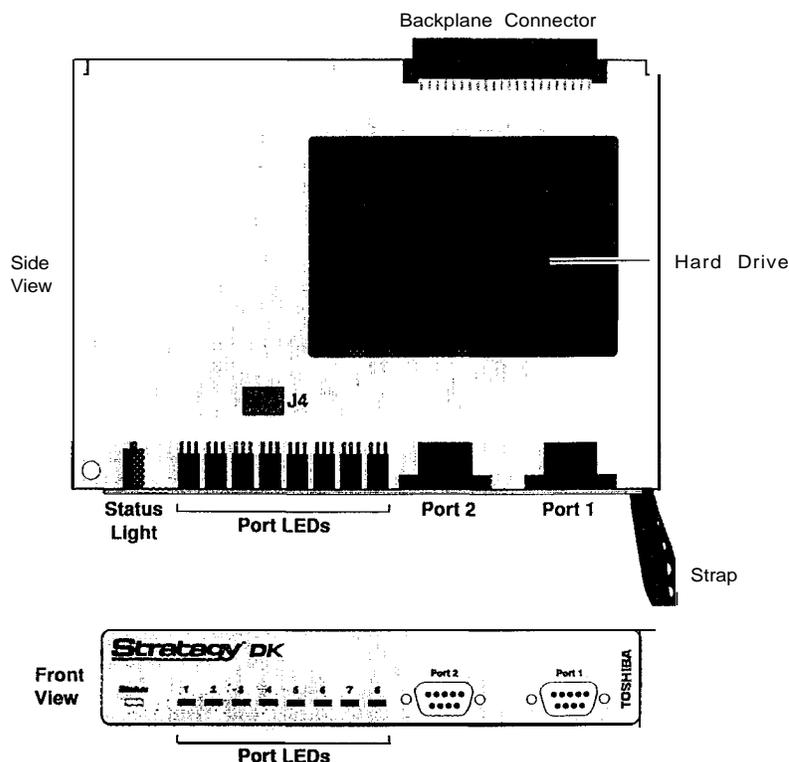


Figure 4 Strategy DK

Table 3 Strategy DK Status/Port LEDs

Status LED		Port LEDs	
At boot-up:		Dark	Port is on-hook and idle.
Dark	No power	Green	Port is off-hook and in use.
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 Hard Disk		
	6 Integration Processor		
	7 DSP #1		
While system is <b>operational</b> :			
Green	System is operational.		
Green with Blinking Amber	System is operational and hard drive is active.		

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

- Dial the extension number for each port, Strategy 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 (“To reach the person..”), greeting 1 in User ID mailbox 991.

**Step 7: Connect Portable/Desktop Computer to Strategy DK**

To program the Strategy DK, a IBM-compatible portable/desktop computer must be connected to the Strategy and have the following:

- ◆ 3.5” 1.44 (high-density) floppy drive
- ◆ Hard drive with a minimum of 5MB of available disk space
- ◆ DOS V6.2 or higher must be resident on the hard drive
- ◆ 580KB RAM memory free

Communication between the portable/desktop computer and the Strategy DK is accomplished by one of two methods: local or remote.

Strategy DK uses the serial Port 2 by default to communicate with the portable/desktop computer (see Figure 4). This setting can be changed using *the adminport* parameter in the Strategy System Configuration file (see Table 5 for detailed information).

**Local Connection**

- Using a null-modem cable, connect the portable/desktop computer to the Strategy DK. A prefabricated cable (SG-ADMCBL), designed expressly for Strategy Admin communication with the Strategy DK, is available from Toshiba.

**Note** For those who wish to purchase individual cabling/connectors/adapters in lieu of purchasing the Toshiba Strategy Admin cable, we have provided the following wiring diagrams.

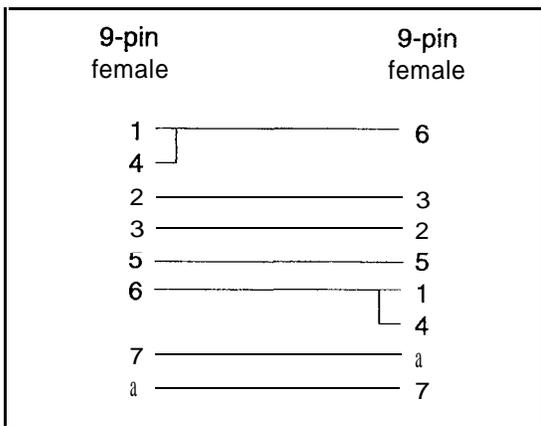


Figure 5 FE-232 **DB9** to **DB9** Cabling

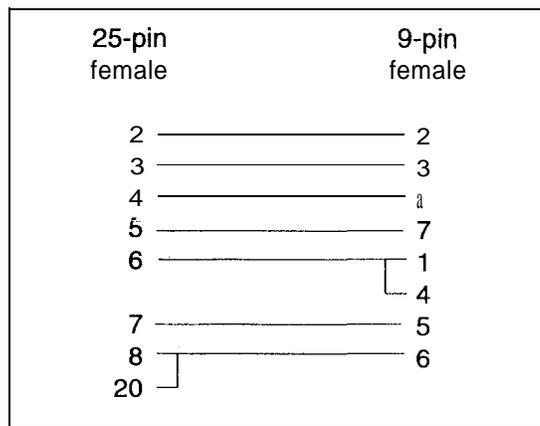


Figure 6 **RS-232** DB25 to DB25 Cabling

## Remote Connection

### Portable/Desktop Computer Modem

- ✳ Prepare the portable/desktop computer by installing, connecting and configuring a modem. The modem must be capable of communicating at a minimum of 2400 baud

---

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

---

### Stratagy Modem

The Stratagy DK can communicate through either an internal or external modem.

#### Internal

The Stratagy DK has an internal modem that communicates at up to 2400 baud. No additional equipment is necessary. (See KM token in Step 13 “Application Programming” on Page 23 for programming information.)

#### External

An external modem can be installed on the Stratagy DK for a communication speed of 9600 baud. If 9600 baud communication is desired:

1. **Equip** the Stratagy DK with a Hayes-compatible 14400 **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 DK remote access is serial port 2 (see Figure 4). Local and remote access utilize the same designated serial port on the Stratagy DK.

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 8: Load Stratagy Admin Software (**VSA.2G**)

1. Insert disk 1 of 1 of the Stratagy Admin software into the floppy-disk drive of the portable/desktop computer.

**Note** If currently running Windows®, you will need to obtain a DOS prompt (c : \). Do this by shutting down Windows or by using the MS-DOS program or shell.

2. Type a : **install c : \admin3** to begin the installation procedure. (It is recommended that you not overwrite the current Admin directory but create a new directory.)

The following messages are displayed:

```
Install Remote Stratagy Admin software
package to C:\Admin3??
Press Ctrl+C to abort or press any key to
continue...
```

- Press any key to continue and the Stratagy Admin program is installed on drive C: in subdirectory ADMIN3.

## Step 9: Configure 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 Stratagy DK.

For example, if using COM 1 on the portable/desktop computer and serial Port 2 on the Stratagy DK, the Stratagy Admin Serial Port definitions for COM1 must be identical to the serial port definitions (i.e., set *serial\_port*) in the Stratagy System Configuration file on the Stratagy DK.

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

- From the C:\ADMIN3 DOS prompt, type **admin** and press **Enter**.  
The Stratagy Admin Main screen is displayed:

```

Stratagy Admin VXX.XX Feb 24 1997
-----
1. Connect to Stratagy
2. Configure Admin
-----
ESC/Exit          F1/Help

```

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

- Press 2 or highlight the Configure Admin option and press **Enter**.  
The following screen appears:

```

Admin PC Configuration
-----
Advertising: Stratagy ADMIN
Log File:    remote.LOG
Serial Port: 2
Baud Rate:   9600
Modem Init String: AT&F&C1&D2L0Q0V0X0E1
-----
ESC/Exit F1/Help

```

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

- See Table 4 for a description of each of the fields. To save your changes, you must press **Enter** or the arrow down (↓) key from the last field (i.e., Modem Init String). The program returns to the Admin Main screen.

To exit without saving your changes, you may press **Esc** at any time. The Stratagy Admin Main screen is displayed.

Table 4 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 <i>tmo_blank</i> parameter in the <i>install.cfg</i> file). Possible values: 60-character string. The single quotes are required. Default: 'Stratagy ADMIN'
Log File	System log file name. This log file contains start-up information, any execution error information, system actions, and shutdown information  Note <i>It is a good idea to periodically archive or delete this file once or twice a year, whenever you perform preventive maintenance.</i> Possible values: 8-character file name, plus 3 character extension. The single quotes are required Default: 'Remote.LOG'
Serial Port	Port number Possible values: 1-4 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. Default: AT&F&CI &D2LQ0V0X0E1 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.  &CI 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.  vo Result code format. Numeric format.  X0 Extended result codes Disables <b>monitoring</b> of busy tones unless forced otherwise by country requirements. Sends only OK, connect, ring, no carrier, error and no answer result codes.  E1 Command Character Echo. Enables echoing of the commands to the screen

## Step 10: Access Strategy DK

Prior to accessing Strategy, verify that Strategy is operational by making a test call into the system.

**Note** Menu screens detailed in this section are available only in Admin version VSA.2G or later.

1. From the DOS prompt (C:\ADMIN3), type: admin and press Enter.

The following screen is displayed:

```
Strategy Admin VXX.XX Feb 24 1997
-----
1. Connect to Strategy
2. Configure Admin

ESC/Exit                               F1/Help
```

**Important!** *The portable/desktop computer must be configured for the correct serial port in Strategy Admin prior to performing Substep 2.*

2. Press 1 or highlight the Connect to Strategy option and press Enter.
3. The **Admin** software prompts for the Strategy DK's system password. Enter the password (the default is S t r a t a g y ) and press Enter.

The following messages are displayed while the Strategy Admin software checks for the portable/desktop computer's connection to Strategy:

```
Preparing for connection. Please wait.

STRATEGY VX.XX/X.X Jun 19 1994 10:40:43
Copyright (c) 1994-5 Toshiba America Information Systems, Inc.
Portions copyright (c) 1991-1995 The Automatic Answer, Inc.
All Rights Reserved.
```

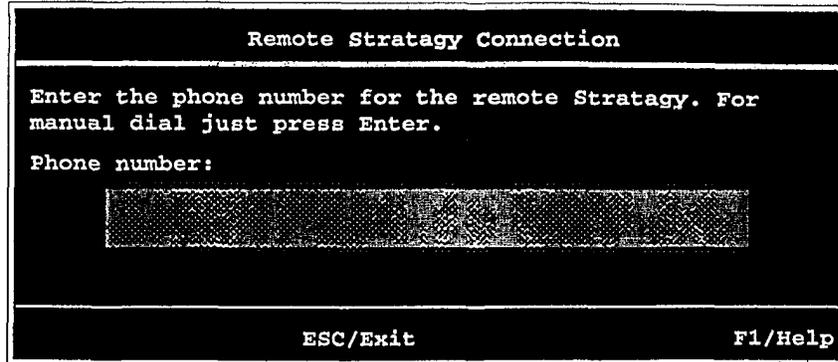
Depending on whether or not the Strategy Admin software finds an internal/external modem connected to the portable/desktop computer, a local or remote connection is established.

### Local Access

If a modem is not detected in **Substep 3** above, Admin establishes a direct connection and a version of the standard Main Menu displays (Figure 7). Proceed to Step 11 "Configure Strategy DK" on Page 16.

## Remote Access

If a modem is detected in Substep 3 on Page 14, Stratagy displays the following screen:



Stratagy Admin software version VSA.2G has two modes of accessing the Stratagy DK 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 modem being used on the portable/desktop computer.

Earlier versions of the Admin software, permit only the direct dialing mode.

### Direct Dialing Mode

- Enter the telephone number (15 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. Admin synchs up to the modem.

A message reading Connect ion established appears briefly on the screen and a version of the standard Main Menu displays (see Figure 7). Proceed to Step 11 “Configure Stratagy DK”.

### Manual Dialing Mode

1. Press Enter to go to the Manual Dialing Mode screen.

The following messages appear on the screen:

Dial from analog phone attached to the modem.  
To Connect **press ENTER** once you hear carrier. To Quit press ESC at any **time**.

2. Go off-hook on the standard telephone and dial the telephone number.
3. Once connection is made to the Stratagy modem, a carrier tone is heard. Press Enter. Admin synchs up to the modem.

A message reading `Connection established` appears briefly on the screen and a version of the standard Main Menu displays (see Figure 7). Proceed to Step 11 “Configure Strategy DK”.

### Step 11: Configure Strategy DK

To configure the Strategy DK, you may need to use the following Tools menu selections:

- ◆ Toshiba Plug and Play
- ◆ Telephone System Configuration
- ◆ Strategy System Configuration.

For a complete description of the standard menu selections and field descriptions, see the *Strategy I&M Manual*.

The screenshot shows a terminal window with the following content:

Menu Bar													
Users	Reports	Shutdown	Tools	Date/Time	Quit	KSU time	Main						
<b>System Information</b> Strategy VDK .20/1.01 Voice Processing TATS, Inc. Copyright 1994 Strata DK 280				Usage: 0/98% Users: 101 Space: 24:00 94% Calls: 1013 Notify Scan At 08/29/94 17:58		Time: 08/29/94 17:04:03 Started: 08/29/94 16:58:01 Shutdown: 08/30/94 01:30							
Port Activity Statistics		Port User ID		Status		Calls Last		Port User ID		Status		Calls Last	
1/A	990	DIAL	290	17:04									
2/A	991	IDLE	181	17:02									
3/A	3366	RECORDING	17	17:04									
4/A	990	IDLE	3	09:56									

Figure 7 Main Menu with Sample Data

Note 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**.

1. Press **Alt+t** for the Tools submenu.
2. Type the password. (The default password is **Strategy**, with the first letter uppercase.)

Note Menu screens detailed in this section are available only in Admin version **VSA.2G** or later.

The following screen displays:

```
Tools
-----
1. Backup Utility
2. Restore Utility
3. Upgrade Stratagy software
4. Telephone System Configuration
5. Toshiba Plug and Play
6. Stratagy System Configuration
7. Retrieve Trace File
8. Filecopy
```

## Toshiba Plug and Play

The Stratagy DK is pre-installed for the DK280. If you need to change this selection to a different Strata DK telephone system, change it now using this selection. Otherwise, go to “Telephone System Configuration” on Page 18.

Selecting this function will:

- ◆ change all the settings to the new Toshiba telephone system default values
- ◆ delete any User ID mailbox customizations
- ◆ install the Strata DK 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 DK280 is run, then mailbox 200 retains the messages and greetings from the previous database.

1. From the Tools menu, press 5. The following menu is displayed:

```
Toshiba Plug & Play
-----
1. DK424
2. DK424 with SMDI
3. DK280
4. DK280 with SMDI
5. DK16e
6. DK16e with SMDI
7. DK16
```

**Note** Selection 6 – **DK16e** with SMDI will be available in a future release of Strata DK.

2. 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.

- 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 (see “pbx-type” on Page 22 for details).
3. When the Toshiba telephone system is complete, press any key to reboot.
  4. The DOS prompt is displayed. To continue, re-enter Stratagy Admin and access the Tools submenu.

**Note** The new telephone system designation will display in the Main Menu.

## Telephone System Configuration

This function is to be used to modify the following codes/integration patterns:

- ◆ Telephone system dial codes – Stratagy controls 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 – Allows modification to the Strata DK integration patterns.

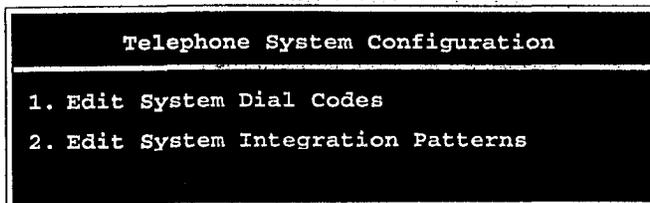
**Note** The telephone system configuration is set using the `pbx_type` parameter (see “pbx-type” on Page 22 for details).

If your system is to be configured for system dial codes or system integration patterns, you will need to edit them now. As an example:

<b>If your system is configured for tone first, you would:</b>
1. Press <b>1</b> to Edit System Dial Codes.
2. From the Telephone System Dial Codes screen, delete the suffix <b>1-</b> from the line What to <b>dial AFTER dialing</b> the User ID extension.
3. Press <b>2</b> to save your changes without restarting Stratagy.

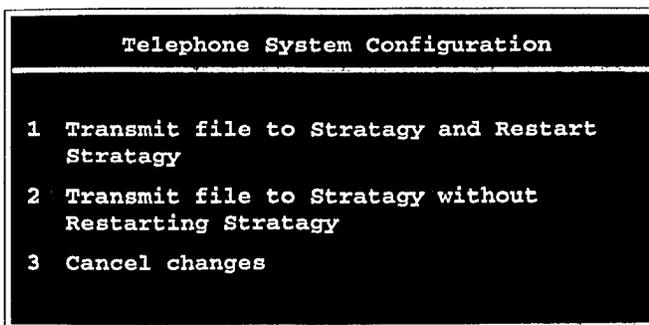
Otherwise, go to “Stratagy System Configuration” on Page 19.

1. From the Tools menu, press 4. The following menu is displayed:



2. Press 1; the Telephone System Dial Codes screen is displayed (see Figure 4-5 in the *Stratagy I&M Manual*).  
 . . .or press 2; the System Integration Patterns screen is displayed (see Figure 4-8 in the *Stratagy I&M Manual*).

3. After making the change, press ESC and the following screen displays:



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 press *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 press *3*; the changes you have made are cancelled and not saved.

---

**CAUTION!** Care should be taken when making changes and then restarting Stratagy. In some cases, if invalid information has been entered, Stratagy may not reboot correctly.

---

## Stratagy System Configuration

Use this function to change Stratagy's system options and parameters, and define time-out values. 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 may be modified as required.

1. From the Tools menu, press *6*. The system configuration file with all parameters in alphabetical order is displayed.

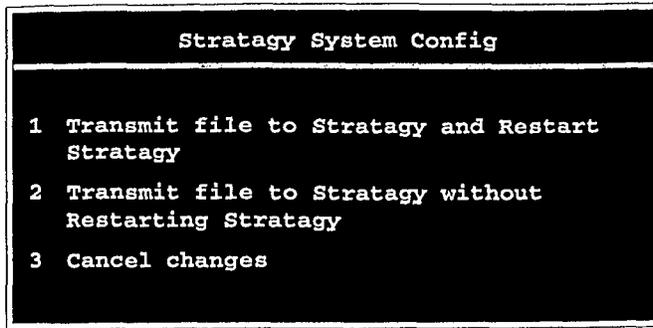
(See Chapter 4 – Configuring Stratagy in *the Stratagy Z&M Manual* for a complete list of parameters and their descriptions and Table 5 on Page 20 for a description of new parameters added for the Stratagy DK.)

**Note** Fax settings are not available to the Stratagy DK.

2. Make changes to the parameters (See “System Configuration” on Page 4- 11 of the *Stratagy I&M Manual* for instructions on changing the parameters.)

**Important!** *Take time to review the new parameters in Table 5 on Page 20. They are important to the proper functioning of the Stratagy DK and its new features.*

3. Press ESC. The following menu is displayed:



Press 1; the changes are transmitted to Strategy and Strategy is shut down and restarted. By shutting down and restarting Strategy, the changes take effect.

...or press 2; the changes are transmitted to Strategy but Strategy is not shut down or restarted. Until you restart Strategy, the changes do not take effect.

...or press 3; the changes you have made are cancelled and not saved.

4. Press 3 to save the changes. Strategy shuts down and restarts.
5. Press any key to reboot. The DOS prompt is displayed. To continue with Step 11, you must re-enter Strategy Admin.

Table 5 Strategy DK System Configuration Parameters – Definitions and Settings

Parameter	Description
admingort	<p>In order for Strategy to communicate with the portable/desktop computer connected to one of its serial ports, Strategy needs to know which port is to be used. This parameter defines the logical port that Strategy software uses. Assignment of the logical <i>port</i> to the physical port of the computer is made using the set <i>serial_port</i> parameter.</p> <p>Example: Set this parameter to 1 for logical serial port 1</p> <p><b>CAUTION!</b> <i>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 portable/desktop computer.</i></p> <p>Possible values: 1 (COM1), 2 (COM2)                      Default: 2</p>

Table 5 Stratagy **DK** System Configuration Parameters – Definitions and **Settings**(Continued)

Parameter	Description																
<p>console-slot-id</p>	<p>Identifies to Stratagy the physical slot in the Strata DK which contains the PDKU programmed for DSS console in Program 03 (type 64). The Stratagy DK monitors this slot for the busy lamp field (see <i>dss_active</i> parameter), KSU system time, and Night Transfer</p> <p>For Strata <b>DK16e, DK16, DK24, DK56,</b> and DK96: the <i>console-slot-id</i> is always set to 0 (zero). Slot ID 0 corresponds to card slot S11 for DK16 and DK16e, or slot 01 for DK24, DK56, and DK96</p> <p><b>CAUTION!</b> For Strata DK16: If this parameter is set to 1, Stratagy DK is disabled All ports return "ring no answer" when dialed.</p> <p>For Strata DK424 and DK280: set this parameter per the following table.</p> <table border="0" data-bbox="488 537 894 785"> <tr> <td>DK280/DK424</td> <td>Console-slot-id</td> </tr> <tr> <td colspan="2">Slot Assignment</td> </tr> <tr> <td>11, 31, 51</td> <td>0</td> </tr> <tr> <td>12, 32, 52</td> <td>1</td> </tr> <tr> <td>13, 33, 53</td> <td>2</td> </tr> <tr> <td>14, 34, 54</td> <td>3</td> </tr> <tr> <td>15, 35, 55</td> <td>4</td> </tr> <tr> <td>16, 36, 56</td> <td>5</td> </tr> </table> <p><b>Important!</b> For this feature to work, the PDKU must reside in an odd numbered cabinet (see Figure 3 on Page 8 for examples)</p> <p><i>In all applications, the Stratagy DK 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).</i></p> <p>Possible values: 0 ~ 5 Default: 0 (zero)</p>	DK280/DK424	Console-slot-id	Slot Assignment		11, 31, 51	0	12, 32, 52	1	13, 33, 53	2	14, 34, 54	3	15, 35, 55	4	16, 36, 56	5
DK280/DK424	Console-slot-id																
Slot Assignment																	
11, 31, 51	0																
12, 32, 52	1																
13, 33, 53	2																
14, 34, 54	3																
15, 35, 55	4																
16, 36, 56	5																
<p>daylight-saving-time</p>	<p>Resets Stratagy's system time to daylight savings time.</p> <p>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.</p> <p>FALSE: Stratagy does not reset system time and continues with standard time (Stratagy clock).</p> <p><b>important!</b> Setting the <i>ksu_time</i> parameter to true, disables this setting.</p> <p>Notes</p> <ol style="list-style-type: none"> <li>This function is available only on Stratagy Admin software.</li> <li>The current setting is displayed at the top right corner of the Main Menu.</li> </ol> <p>Possible values: true, false Default: true</p>																
<p>dss_active</p>	<p>Enables the Stratagy DK to monitor the Busy Lamp Field (BLF) indicators on the Strata <b>DK's</b> DSS console port to determine if an extension is busy before attempting to transfer. This parameter corresponds with the <b>DSS Port</b> field assignment in the Users Option Menu of a User ID.</p> <p><b>Important!</b> If this parameter is set to false, the DSS Port field on the Users Option Menu is disabled.</p> <p>Possible values: true, false Default: false</p>																

Table 5 **Stratagy DK** System Configuration Parameters -- Definitions and **Settings**(*Continued*)

Parameter	Description
<p><b>ksu_time</b></p>	<p>Synchronizes Stratagy DK's system clock with the system clock of the supporting Strata DK telephone system.</p> <p>information obtained by Stratagy DK from the Strata DK system does not contain "second" time; therefore, there may be a 1 ~ 60 second difference between the Strata DK system and the KSU time displayed on the main menu of the Stratagy Admin program.</p> <p style="text-align: center;"><i>Important! Because the Strata DK uses a 24 hour system clock, but does not notate a.m./p.m. on the LCD display: it is necessary to program the correct date and time in the Stratagy DK Main Menu, <b>Date/Time</b> function, during the initial installation or when the system has been shut down for any extended time.</i></p> <p style="text-align: center;"><i>Note Setting this parameter to true, disables the daylight-saving-time parameter</i></p> <p>Possible values: true, false Default: true</p>
<p><b>pbx_type</b></p>	<p>Defines the model of Strata DK that is used as the host system.</p> <p>Possible values: DK8, DK16, DK16e, DK24, DK56, DK96, DK280 (DMTF in-band), <b>DK280S (SMDI)</b> Default: DK280</p>
<p>trace-cap</p>	<p>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.</p> <p>Possible values: Values vary depending on the amount of Trace information required and the space available on <b>Stratagy's</b> hard 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)</p>

## Step 12: Program the Mailboxes

- Program the User mailboxes for the customer's application.

You'll notice some changes in the User Menu -- Options screen. The changes (see Figure 8) are:

- ◆ A new field called *DSS Port* has been added. This new field replaces the Alternate Rate feature, which is not available with the Stratagy DK.
- ◆ The Message Volume feature, although displayed on the screen, is not supported by the Stratagy DK.

S T R A T A G Y						
Menu Bar →	Save	Delete	Copy	Esc/EXIT	PgDn/NEXT	PgUp/PREV
	Auto	Notify	Table	Info/Status		Group/Chains
User's Information →	User ID:	215	Comment:			
	Extension:	215				
	Directory Name 1:	Smith	Directory Name 2: Pat			
	Security Code:					
Basic Options →	Basic Options:					
	Maximum Rings:	0 (default is 4)	Current Greeting:	1	Max:	45 sec
	Do Not Disturb:	OFF	Lock:	OFF	Busy Message:	SYS Max: 45 Sec
	Screen Calls:	OFF	Lock:	OFF	ID Call ?:	NO
	Store Messages:	YES	Max:	180 sec	Play Date/Time?:	NO
	Copy Message To:		Record Name?:	YES	Saved Msg Que:	YES
	Message Volume:	0	Guests:	0	Message Order:	FIFO
					Caller Menu:	NO
					DSS Port:	-1
AMIS Options →	Amis Options:		Gateway Box:	NO	AmisSysNumber:	

Message Volume field is not supported by Strategy DK

Alternate Rate field is replaced by DSS Port on Strategy DK

Figure 8 Options Screen with Sample Data

## DSS Port

The *DSS Port* field corresponds to the “physical” port number of a Strata DK station. This field enables the Strategy DK to monitor the Busy Lamp field of a DSS console port to determine if the station is busy before attempting to transfer.

Due to the Strata DK architecture, only 58 stations can be monitored. User **IDs** without a DSS Port setting will transfer calls in the normal fashion.

**Important!** *If the `dss_active` parameter in the `install.cfg` file is set to false, this field is disabled.*

Example: DK station port 000 equals a value of 0, port 032 equals a value of 32. This value is NOT referenced by the [PDN] number assigned in Program 04, but by the telephone port itself.

Possible values: 0 ~ 57, -1 disables feature

Default: -1

**Important!** *Once the DSS/Busy Lamp feature has been programmed using the two parameters and the `DSS Port` field, Strategy DK 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.*

All other Users Menu, Auto (Scheduling), and Notify screens remain unchanged. See Chapter 6 – Users Menu, Chapter 7 – Auto (Scheduling) Menu and Chapter 8 – Notify Menu in the *Strategy I&M Manual* for complete details on using the screens.

## Step 13: Application Programming

- Program the applications.

**Note** See Chapter 10 – Token Programming in the *Strategy I&M Manual* for complete details on all the Strategy tokens.

Some new tokens are available exclusively for the Stratagy DK. They are:

- ◆ **KM** – Enables a portable/desktop computer’s modem to communicate with the Stratagy DK internal modem (2400 baud) by sending the call to 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

Using the **KT( )** token a new feature called Night Transfer Alternate Routing is now available. The feature monitors the **DSS/BLF** console’s Night Transfer key in order to activate the **KT( )** token for alternate routing applications.

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

- ◆ User ID: 900
- ◆ User ID when Night Transfer is ON: 901
- ◆ User ID when Night Transfer is OFF: 990

Program Procedure:

1. Define the Users record to contain:

<b>User ID 900</b>	
Extension	<b>@KT(901)G(990)</b>
Do Not Disturb	<b>OFF</b>
Store Messages	<b>NO</b>
DSS Port	port number
Note	<i>Set this field to the first port of the PDKU card designated for DSS/BL F console and defined by the console-slot-id parameter. If PDKU is in card slot 11, then DSS Port assignment is 0. Strata DK assigns the first port of the slot 64 card as a DSS “host” port.</i>

2. In the Stratagy System Configuration file:
  - ◆ Select the set *box\_grt* parameter for the specific port and type in 9 0 0.
  - ◆ Activate the *dss\_active* parameter and set 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 will be routed to User ID 901. When the Night Transfer key is disabled, calls route to the User ID 990.

## Step 14: Strategy DK Maintenance

To maintain the Strategy DK, you will need:

- ◆ Tools (Main Menu selection)
- ◆ Trace diagnostics

We recommend that before you finish the installation process, you back up your new database, mailbox names and greetings.

### Tools

The following Tools menu selections will be needed for maintenance of the Strategy DK (see Figure 2):

- ◆ Backup Utility
- ◆ Restore Utility
- ◆ Upgrade Strategy software
- ◆ Retrieve Trace File
- ◆ Filecopy

#### Backup Utility

The Strategy Backup Utility is used to back up information from the Strategy DK hard drive to the hard drive of the portable/desktop computer.

---

**CAUTION!** Because of possible errors that can be induced through the telephone network, Toshiba advises that the Backup Utility be performed **onsite**.

---

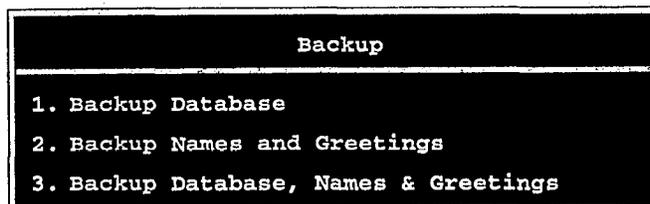
Backup functions are available for either a customer's database or mailbox names and greetings, or both. They consist of:

- ◆ Database  
All mailbox settings and information, Strategy 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 Strategy system regularly enables you to restore your system with minimal data loss if the system fails (hard drive failure, etc.).

**Note** Messages cannot be backed up.

1. From the Tools menu, press **Enter**. The following menu is displayed:



**CAUTION!** During the Backup and Restore procedures, the Strategy DK cannot be processing calls. When any Backup or Restore function is selected, Admin will query the Strategy DK if there are any calls currently in progress. If calls are in progress, Admin will ask if the calls can be terminated. If call termination is selected, any current connection will be disconnected and all ports will be commanded to go off-hook to prevent any further calls. If call termination is denied, the Backup or Restore procedure is halted.

During a Backup or Restore, the Strategy DK is in full operation, only the ports have been busied out. If the connection between the portable/desktop computer to the Strategy DK is dropped, communication can be re-established by simply accessing Strategy Admin in the usual manner.

If the connection between the portable/desktop computer and the Strategy DK is by way of the internal modem, that connection will be the only one NOT dropped if a Backup or Restore function is selected. If this type of connection is dropped, the Strategy port will go idle and will accept new incoming calls. Connection to the internal modem can be re-established through this port.

2. Enter the number of your selection and a second screen requesting a backup directory is displayed. The directory defaults to **C : \ADMIN3 \BACKUP**. If you want a different directory, type over the default. Be sure to enter the complete path, including the drive letter. Press Enter.

**Note** Backup of files to the portable/desktop computer's floppy-disk drive is not supported.

If the directory already exists, you are given the option of entering a new directory or overwriting the file.

3. If you enter selection 2 or 3, you are also asked to enter a beginning and ending mailbox number. Press Enter after each entry.

**Note** Leaving both fields blank defines all mailboxes.

Once the backup starts, Admin calculates the time the backup will take and displays a status message.

```
Backup time 4 min. 49 sec. Continue? [NY]
```

**Important!** *Since the Backup file is copied to your-portable/desktop computer's hard drive, you should **verify** that there is enough available disk space to accommodate it. Use the following chart to estimate the required hard drive space based on the estimated Backup time.*

<i>Transmitting at:</i>	<i>Bytes Per Second being written to hard drive:</i>
<i>9600 bps</i>	<i>800 bytes</i>
<i>4800 bps</i>	<i>400 bytes</i>
<i>2400 bps</i>	<i>200 bytes</i>

*Example: If Admin displays a 5 minute backup time and communication is at 9600 bps, then:*

*5 min. = 300 secs.*

*300 secs. x 800 bytes = 240,000 bytes*

*Bytes Per Second values are not exact. Additional amounts have been factored in to estimate a higher quantity of space than will actually be required.*

4. Press Y to continue.

When the backup is complete, the following status message is displayed.



```
Backup successful. Reboot Strategy? [NY]
```

---

**CAUTION!** If Strategy is not rebooted, all ports will remain in an off-hook condition.

---

5. Press Y to reboot Strategy.

The portable/desktop computer returns to the C : \ADMIN3 DOS prompt. When the Strategy DK status light becomes a solid green, Strategy is operational.

**Note** You will not be able to reconnect to Strategy using Strategy Admin until the Strategy DK status light is green. Any attempt prior to that time will fail.

### Restore Utility

The Strategy Restore Utility is used to restore information from the portable/desktop computer's hard drive to Strategy's hard drive.

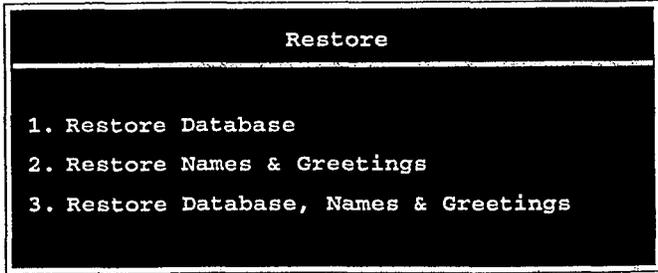
---

**CAUTION!** Because of possible errors that can be induced through the telephone network, Toshiba advises that the Restore Utility be performed **onsite**.

---

Restore functions are available for either a customer's database or mailbox names and greetings, or both.

1. From the Tools menu, press 2. The following menu is displayed:



```
Restore
-----
1. Restore Database
2. Restore Names & Greetings
3. Restore Database, Names & Greetings
```

---

**CAUTION!** Stratagy Voice Processing will be suspended during the restore procedure. Any existing connection is broken. For additional information on the Restore procedure, see the Caution on Page 26.

---

2. Enter the number of your selection and a second screen requesting the source directory is displayed. The directory defaults to `c : \ADMIN3 \BACKUP`. If you have the file(s) in a different directory, type over the default. Be sure to enter the complete path, including the drive letter. Press `E n t e r`.

**Note** Restoring files from the portable/desktop computer's floppy-disk drive is not supported.

3. If you enter selection 2 or 3, you are also asked to enter a beginning and ending mailbox number. Press `E n t e r` after each entry.

**Note** Leaving both fields blank defines all mailboxes.

Once the restore starts, Admin calculates the time the process will take and displays a status message.

```
Restore time 4 min. 49 sec. Continue? [NY]
```

4. Press `Y` to continue.

When the restore is complete, the following status message is displayed.

```
Restore successful. Reboot Stratagy? [NY]
```

---

**CAUTION!** If Stratagy is not rebooted, all ports will remain in an off-hook condition.

---

5. Press `Y` to reboot Stratagy.

The portable/desktop computer returns to the `C : \ADMIN3` DOS prompt. When the Stratagy DK status light becomes a solid green, Stratagy is operational.

**Note** You will not be able to reconnect to Stratagy using Stratagy Admin until the Stratagy DK status **light** is green. Any attempt prior to that time will fail.

## Upgrade Stratagy Software

To upgrade Stratagy system software, you will need the correct set of software.

---

**CAUTION!** Because of possible errors that can be induced through the telephone network, Toshiba advises that the Upgrade Utility be performed **onsite**.

---

1. From the Tools menu, press 3.

The following menu is displayed:

```

Upgrade
-----
WARNING:  Strategy Voice Processing will be
          suspended. Any existing
          connection will be broken.
-----
Upgrade from directory:
A:
-----
ESC/Exit F1/Help

```

2. Place the upgrade disk into the portable/desktop computer's floppy-disk drive.
3. The default directory is A:. If you need a different drive, type over the default. Press Enter.

When the upgrade procedure is complete, the following message is displayed:

```

Upgrade successful. Press any key to reboot
Strategy.

```

4. Press any key.

The portable/desktop computer returns to the C : \ADMIN3 DOS prompt. When the Strategy DK status light becomes a solid green, Strategy is operational.

**Note** You will not be able to reconnect to Strategy using Strategy Admin until the Strategy DK status light is green. Any attempt prior to that time will fail.

#### Retrieve Trace File

This function can be used to copy the trace data log file (trace.out) to the portable/desktop computer's hard or floppy-disk drive.

**Note** The size of the trace file can be set using the *truce-cap* parameter in the *install.cfg* file of Strategy (see "trace-cap" on Page 22 for a description of the parameter).

1. From the Tools menu, press **7**. The following menu is displayed:

```

Retrieve Trace File
-----
Trace file name:
TRACE.OUT
Retrieve to directory:
C:\ADMIN3\TRACE.OUT
-----
ESC/Exit F1/Help

```

2. The trace file name defaults to TRACE. OUT. If the file has a different name, type over the default. Press Enter.

Note Possible files you might want to retrieve are. TRACE.OUT and Stratagy.log.

3. Enter the directory to which you want the file to be copied. The default is C:\ADMIN3\TRACE. OUT, If you need a different directory, type over the default. Press Enter.

If the directory already exists, you are given the option of entering a new directory or overwriting the file.

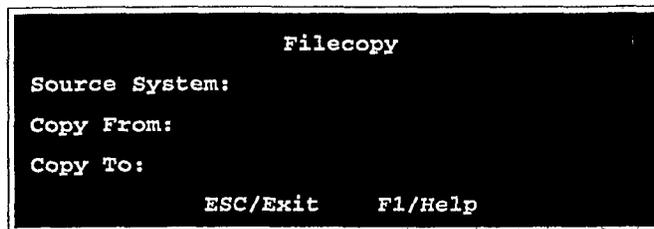
Note Be sure to enter the complete path.

## Filecopy

Use Stratagy Admin's Filecopy option to copy files to and from the hard drives of the Stratagy DK and the portable/desktop computer.

1. From the Tools menu, press 8. The following menu is displayed:

The following screen displays:



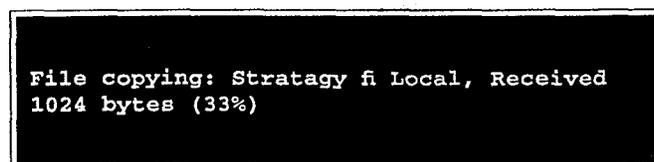
2. In the Source System field (where the file currently resides), press **F2** to display a pop-up box of selections. Highlight PC for the portable/desktop computer or Stratagy for Stratagy and press Enter.
3. In the Copy From field, type the directory name, if necessary, and the file name.

Note If a directory name is not entered, Filecopy searches the Stratagy or Admin directory (portable/desktop computer) for the file to be copied.

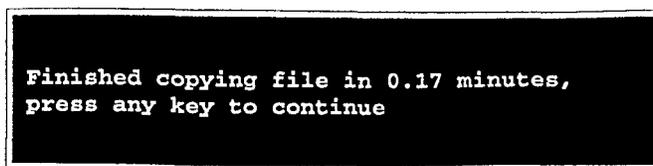
4. Press Enter when finished.
5. In the Copy To field, type the directory name, if necessary, and the file name.

Note If a directory name is not entered, Filecopy assigns the destination for the file to the Stratagy or Admin directory.

6. Press Enter when finished. While the file is being copied, the following dialog status box is displayed:



When the copy is complete, the following status box is displayed:



7. Press any key to continue.

## Trace Diagnostics

Trace is a diagnostic tool that is designed to assist you in troubleshooting Strategy's activity. When Trace is enabled, it is automatically turned on when Strategy loads up and logs data until Strategy software is shut down.

To log the trace data, you can use a text file called TRACE.OUT. The size of the trace file can be configured using the trace-cup parameter (see Table 5). 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.

### Enabling Trace Out

#### ➤ To enable Trace Out

- Using the Shutdown function on the Strategy **Admin** Main Menu, select the option "Shutdown and Trace **CURRENT** Version." For more details, see Step 15 "Shut Down the Strategy DK" on Page 32.

Strategy shuts down, then restarts in TRACE mode. Trace will run continuously until Strategy is shut down. At that point, the Trace stops but data will still reside in the text file TRACE.OUT.

### Copying Trace Files

The TRACE.OUT file can be copied to a floppy disk and edited.

#### ➤ To copy a Trace file to the portable/desktop computer's floppy-disk or hard drive

1. From the Strategy Admin Main Menu, press **Alt+T** to select the Tools menu.
2. Press **7** to select the Retrieve Trace File option.
3. Enter the trace file name and the directory to which you want the file to be copied. Press **Enter**.
4. The file may be edited using an available editing program on the portable/desktop computer.

## Upgrading Strategy DK Voice Ports

Upgrading the number of voice ports on the Strategy DK, 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
- ◆ Remote system's password

And the port upgrade will be activated by Toshiba remotely.

Note The Strategy DK must be reset for the new ports to be activated.

## Step 15: Shut Down the Strategy DK

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

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

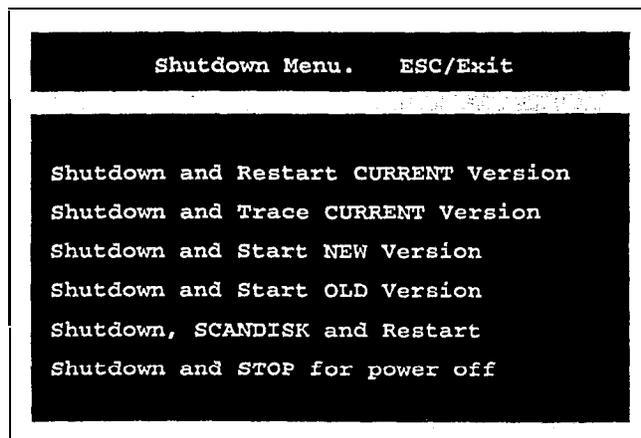
---

**CAUTION!** Never shut Strategy down by turning off the Strata **DK's** power. Doing so may corrupt the system files that are in use and damage the hard disk. Perform the following first,

---

1. From Strategy Admin's Main Menu, select Shutdown by pressing `Alt + S`.
2. Enter the password (the default is "Strategy") and press `Enter`.

The following screen displays:



The screen enables you to select one of the following options:

- ◆ Shutdown and Restart CURRENT Version — Restarts Strategy (equivalent to pressing the Esc key on the current Strategy platform).
- ◆ Shutdown and Trace CURRENT Version — Shuts down, then restarts Strategy in the TRACE mode (TRACE.OUT file is created) on Strategy hard drive.
- ◆ Shutdown and Start NEW Version — Shuts down, then restarts Strategy using the new database and new Strategy system software, if any (see "Toshiba Plug and Play" on Page 17).
- ◆ Shutdown and Start OLD Version — Shuts down, then restarts Strategy 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.

Note The “Shutdown and STOP for power off” option is not available when accessing Stratagy remotely.

3. Highlight your selection and press `Enter`.