Stratagy™ 4/6/24

INSTALLATION AND MAINTENANCE MANUAL

Stratagy™ 4/6/24

GENERAL DESCRIPTION

STRATAGY 4, 6, and 24
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 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 (714) 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:

1. Your telephone number.
2. FCC registration number:

   1A92PJ-10975-VM-E
3. 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.
4. Network connection information USOC jack required: 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 own expense, will be required to take whatever measures may be required to correct the interference.

This system is listed with Underwriters Laboratory.

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FIGURE LIST

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CHAPTER 1
SYSTEM OVERVIEW

GENERAL

The Stratagy system is a multi-application voice processing system, which is tailor-made for small- to large-sized businesses. It has been designed to be flexible and easy to use, while offering a full range of features. (Refer to Figure 1-1.)

The Stratagy system easily integrates with most telephone systems, providing call coverage and routing for your entire organization. Stratagy also provides enhanced integration with Toshiba telephone systems. Chapter 4 includes general information on all Stratagy features and integration capabilities with telephone systems.

Stratagy provides basic applications such as Automated Attendant to answer incoming calls, Call Routing to direct calls, Telephone Answering to take messages when an individual is unavailable or busy, and Voice Messaging to create, send, receive, forward, and save voice messages.

Additionally, Stratagy's Token Programming Language provides the flexibility to design custom individual features and custom applications such as Fax Integration, Interactive Voice Response, and more.

Stratagy is a turn-key voice processing system that runs on a personal computer (PC) based platform. All service, including installation and maintenance, is performed by an authorized Toshiba dealer.

SYSTEM CAPACITIES

Stratagy can be configured in various ways using three different platforms. The Stratagy 4 and Stratagy 6 are designed for small- to medium-sized businesses, and the Stratagy 24 is designed for larger businesses.

STRATAGY 4

The Stratagy 4 can be configured with 2 or 4 ports, with six hours of message capacity. It consists of a 486 computer with 2MB of RAM. The Stratagy 4 integrates with the Strata DK8 and DK16 telephone systems only. It does not have a monitor or keyboard; it requires a lap-top computer for local and remote access. An optional external 2400 baud modem is available for remote maintenance.

STRATAGY 6

The Stratagy 6, can be configured with 2, 4 or 6 ports, with six hours of message capacity. It consists of a 486 computer with 2MB of RAM. The Stratagy 6 integrates with most telephone systems. It does not have a monitor or keyboard; it requires a lap-top computer for local and remote access. An optional external 2400 baud modem is available for remote maintenance.

STRATAGY 24

The Stratagy 24, can be configured up to 24 ports, with a storage capacity of 6, 20 or 33 hours. It consists of a 486 computer with 4MB of RAM. The Stratagy 24 integrates with most telephone systems. It comes with a monitor and keyboard for local access. An optional external 2400 baud modem is available for remote maintenance, which also requires a lap-top computer. It has full fax capabilities

SYSTEM TECHNOLOGY

The Stratagy system uses the following technology:

PC-based Architecture: The Stratagy system uses standard PC-based architecture to form the basis of its design. It uses a half and full length slot, PC bus form factor motherboard. From two to four MB of RAM are included, depending upon the configuration. DOS, Stratagy's operating system, and the Stratagy customer's configuration information, greetings and messages (database) are stored on an internal hard drive.

Microprocessor: A 486SX, 25 MHz CPU is the microprocessor for all Stratagy systems.

Voice Board: Stratagy uses a PC-based voice board to convert, compress and store analog voice signals on the internal hard disk drive.

POWER REQUIREMENTS

The Stratagy system has an input power source which can be switched to 110 VAC or 220 VAC at 50-60 Hz.

MAINTENANCE

Stratagy systems are easy to maintain by an authorized Toshiba dealer. Additionally, procedures for backing up, restoring and maintaining the system software and/or database are efficient and easy to perform.

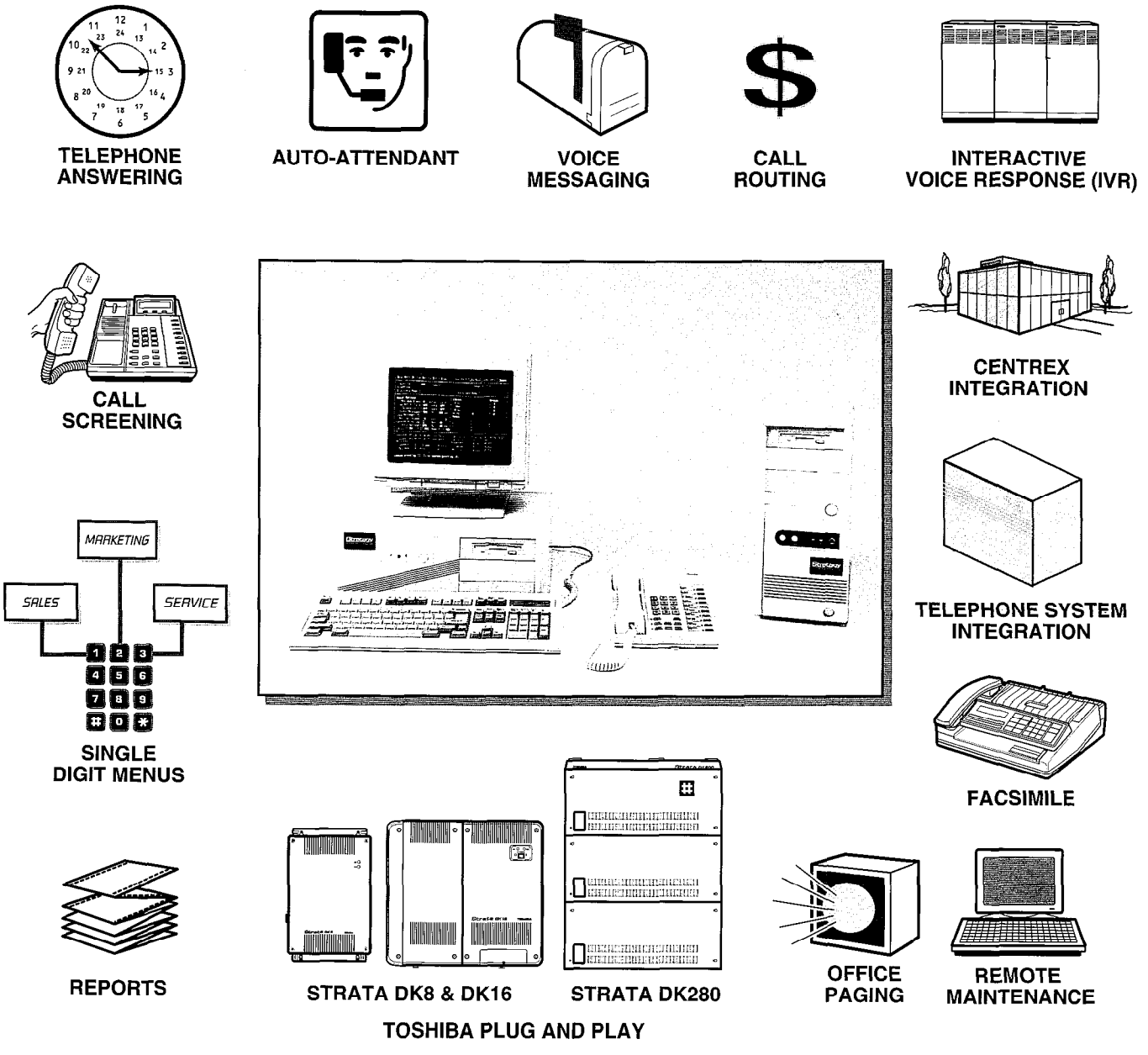

Figure 1-1
Stratagy Applications

SUPPORTING DOCUMENTATION

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

Feature Description Manual—Describes in detail each feature of the Stratagy System.

Installation and Maintenance Manual—Provides installation requirements and documents installation and maintenance procedures for the Stratagy system. Also includes System Administration forms and instructions to configure the system.

Stratagy User Guide—Provides the procedures necessary to operate the Stratagy System.

Quick Reference Guide—Provides a quick reference of frequently-used features.

CHAPTER 2

SYSTEM ARCHITECTURE

This sections describes the main components of the Stratagy System. It provides general descriptions of the following:

- System Hardware
- System Software
- Call Processing Software
- System Administration

HARDWARE

The hardware for the Stratagy system varies depending upon the configuration. All telephone system connectors and wiring are customer-supplied.

STRATAGY 4

Hardware: The Stratagy 4 consists of a standard DOS-compatible 486 PC housed in a mini tower. The PC comes equipped with 2 MB of RAM, a 3.5" disk drive, and a hard disk drive, allowing up to 6 hours of message storage. It supports 2 or 4 ports that connect to the telephone system. There is no keyboard or monitor. An optional 2400 baud external modem is available for remote operation. Because it uses the same hardware, the Stratagy 4 can be easily upgraded to a Stratagy 6.

Refer to Figure 2-1 for an illustration of the Stratagy 4 system.

STRATAGY 6

Hardware: The Stratagy 6 consists of a standard DOS-compatible 486 PC housed in a mini tower. The PC comes equipped with 2 MB of RAM, a 3.5" disk drive, and a hard disk drive, allowing 6 hours of message storage. It supports 2, 4, or 6 ports that connect to the telephone system. There is no keyboard or monitor. An optional 2400 baud external modem is available for remote operation.

Refer to Figure 2-1 for an illustration of the Stratagy 6 system.

STRATAGY 24

Hardware: The Stratagy 24 consists of a standard DOS-compatible desktop 486 PC. The PC comes equipped with 4 MB of RAM, a 3.5" disk drive, a choice of 3 different hard disk drives allowing 6, 20 or 33 hours of storage, and expansion slots for up to 24 ports that connect to the telephone system. An optional 2400 baud external modem is available for remote operation.

Monitor and Keyboard: The Stratagy 24 comes equipped with a monochrome monitor used to display Stratagy systems data. The accompanying keyboard allows the System Administrator to input commands and other information into the Stratagy system.

Refer to Figure 2-2 for an illustration of the Stratagy 24 system.

INTERNAL COMPONENTS

The following provides a brief description of Stratagy's internal components.

MotherBoard: A 486SX, 25 MHz motherboard is standard in all configurations of the Stratagy system.

Voice board: A voice board is used to convert, compress and store analog voice signals on the internal hard drive. The telephone system must be physically connected to each voice board using the boards RJ-14 type connectors. A voice board has one or two connectors, and each connector supports two ports.

Power Supply: The power supply is a standard PC type power supply, requiring a 110 VAC or 220 VAC input.

Hard Disk Drive: The Stratagy 4 and Stratagy 6 come equipped with a 6 hour hard disk drive. The Stratagy 24 is equipped with either a 6, 20, or 33 hour hard disk drive.

Floppy Disk Drive: The Stratagy system is equipped with a 3.5" floppy disk drive.

SOFTWARE

The Stratagy system's flexibility is largely a result of its software. The following provides a brief overview of the Stratagy system software.

Operating System: Controls all real-time voice processing functions through the use of simple administrative menus as well as diagnostics, system activity, and collection and reporting of data.

Installation Program: Used to create the database for telephone system and specific customer information. It is used when installing a new Stratagy system. A SETUP Utility is also used during the installation process for system configuration. Routine additions, changes, and deletions of information are done through this program. Refer to the *Stratagy Installation and Maintenance Manual* for more detail.

Diagnostic Programs: On-line diagnostic tests run continuously to detect and report any errors in operation. The tests run in the background and don't interfere with normal system operation. Other

diagnostic tests may be run upon demand, either from a directly-connected or remote terminal. Refer to the *Stratagy Installation and Maintenance Manual* for more detail.

CALL PROCESSING CONTROL

Call processing in Stratagy involves mailboxes (User IDs), a Token Programming Language, and a series of administrative menus.

MAILBOXES

Mailboxes, also called User IDs, are an important part of the Stratagy system. Mailboxes, which are set up by the System Administrator, determine what a caller hears and call processing of Stratagy. For example, the initial company greeting is defined by a mailbox. What a caller hears is simply what you have recorded as the greeting for this mailbox.

All of Stratagy's mailboxes are uniquely numbered from 0 ~ 99,999,999. When a caller enters an extension, the Stratagy system always accesses the same mailbox. Thus, you cannot have two mailboxes with the same number.

Mailboxes can be set up to fall into one of three general categories:

User Mailbox — A typical mailbox is configured to record messages from callers. A user periodically checks the mailbox for messages, or a variety of automatic notification methods may be employed. There is generally one user for each mailbox, although several mailboxes may share a single extension when the users share a single phone line.

Information Mailbox — An information mailbox is one which does not accept messages from callers. Instead, its greeting is played to callers to provide them with information such as the company's hours of business, its location, etc. No real user or phone extension corresponds to this type of mailbox.

Control Mailbox — This type of mailbox allows the Stratagy to provide control over the flow of a call. Typically, it interacts with the caller in some way, then directs the call to one or more additional mailboxes for processing using the Token Programming Language.

TOKEN PROGRAMMING LANGUAGE

Stratagy's Token Programming Language allows expansion of the standard capabilities of the Stratagy System by using a series of *tokens* that tell the system what actions to perform. Using this token language allows Stratagy to perform the advanced applications described in Chapter 3 of this General Description, and more.

Tokens are used as field values in the administrative menus. To program these fields, the installer or the System Administrator enters a series of Programming Language tokens which instruct Stratagy what actions to perform.

ADMINISTRATIVE MENUS

A series of Stratagy menus allow an installer or the System Administrator to customize system configuration options and individual User IDs. These menus, along with the call processing control structures discussed above, are what provide voice processing capabilities for telephone users and multiple application solutions for customers. Refer to the *Stratagy Installation and Maintenance Manual* for more detail on Administrative Menus.

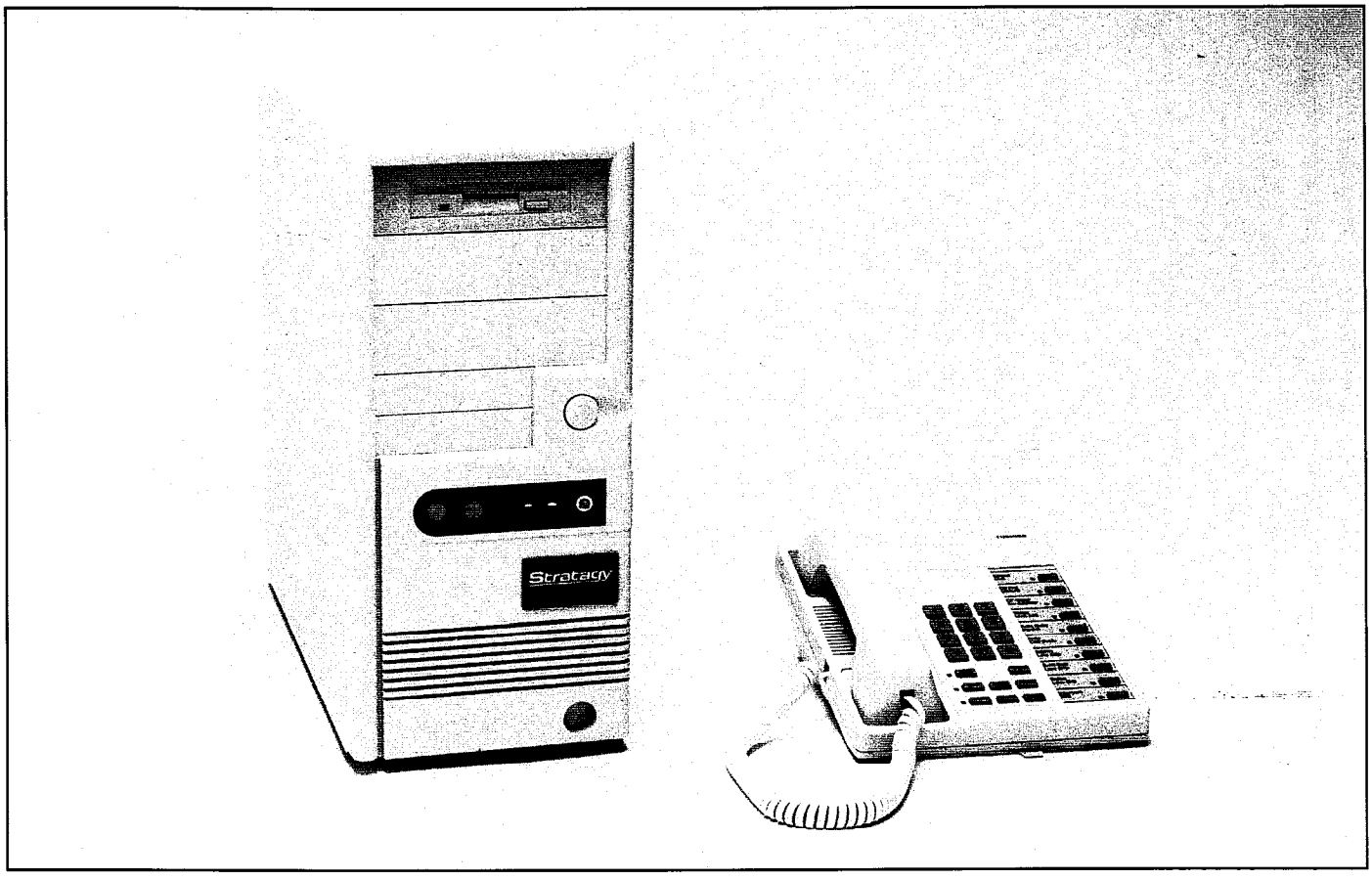

Figure 2-1
Stratagy 4 and Stratagy 6 System

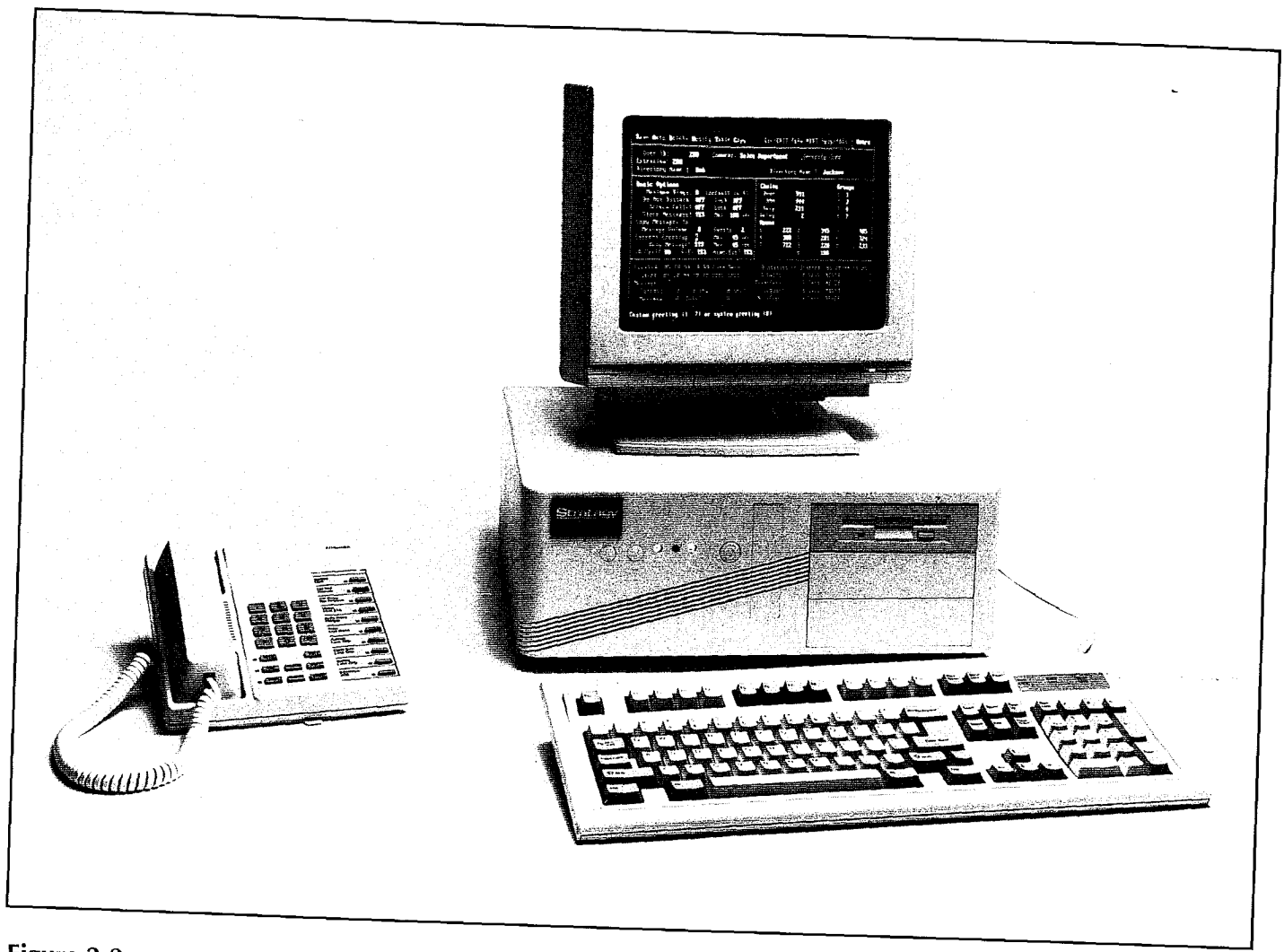

Figure 2-2
Stratagy 24 System

CHAPTER 3

SYSTEM DEFINITIONS AND APPLICATIONS

This chapter contains a list of terms that are commonly used when discussing the Stratagy system. The second part of the chapter describes some basic and advanced applications which can be created using Stratagy. Chapter 4 includes a brief description of all Stratagy features. Refer to the *Stratagy Feature Description Manual* for feature details.

SYSTEM DEFINITIONS

PBX/Phone System — The Stratagy system integrates with most business telephone systems: Private Branch Exchange (PBX), Centrex (usually used to refer to a Central Office located exchange), and hybrid key systems. For convenience, the terms "phone system" or "PBX" refer to the telephone systems to which the Stratagy system connects.

Integration

- Dual Integration

  Normally, all of a Stratagy system's ports will be attached to a single telephone system. But it is possible to configure both the Stratagy 6 and the Stratagy 24 systems on a per-port basis to work with two different telephone systems simultaneously. Because the system can operate with different telephone systems simultaneously, it is appropriate for use in offices where, possibly, two different companies, with two different phone systems, would like to share the costs and benefits of a single Stratagy system.

- Inband Integration

  Many telephone systems (PBXs) can be configured to provide information to the Stratagy system about an incoming call by preceding it with one or more DTMF digits. These DTMF strings are known as Inband Integration or Inband Signaling. The Stratagy system can be configured to receive and interpret these DTMF strings. With this information, the Stratagy system may answer the call with a company greeting, direct the call to begin recording a message for a user who is unavailable, etc.

- SMDI/RS-232 Integration

  SMDI integration is available on both Stratagy 6 and Stratagy 24 systems. SMDI is an industry standard method of integrating a PBX with Voice Mail and other peripheral systems. This interconnection is made via RS-232 data connections dependent upon the PBX capabilities. Data is passed in both directions: the PBX informs the auto attendant/voice mail system about each incoming call, and the voice mail system can send instructions to the PBX to turn message waiting lights on or off, as appropriate.

User and User ID — The subscriber of a mailbox. May also be called subscriber and mailbox user. The User ID indicates the number (0 to 99,999,999) for that user.

Mailbox — Mailboxes are a central element of the Stratagy system. Messages, greetings, and other information are recorded, stored, and activated in a mailbox. Each extension receiving messages is assigned a mailbox. The mailbox number represents the digits a caller enters, usually the same as the extension number.

Not all mailboxes have associated extensions. Some don't even receive messages such as company greeting mailboxes, and information mailboxes.

Extensions — Extensions are telephones connected to the telephone system. In the Stratagy system's configuration, extension is also used to mean the digits that the system dials. These digits are usually an extension number, but they may be any sequence that can be dialed on the PBX. This includes speed dial numbers or access digits, such as 9, used to access outgoing lines for calls.

Ports — The Stratagy system is connected to the phone system as a series of DTMF tone dialing single-line extensions (2500-type sets). The number of ports configured determines the maximum number of calls the Stratagy system can handle simultaneously.

Company Greetings — The Company Greeting is the announcement callers hear after the Stratagy system answers. A simple version is provided with the system: "Thank you for calling. Please stay on the line for assistance, or if you know the extension you wish to reach, please dial it now." A new company greeting can be recorded to replace the default greeting. The greeting can be specific to a group of ports.

Different greetings can also be used during different times of day, different days of the week, and for holidays.

BASIC APPLICATIONS

This section describes the three basic Stratagy applications: Automated Attendant, Telephone Answering, and Voice Messaging.

AUTOMATED ATTENDANT

Stratagy's automated attendant application can be set up to solve various answering requirements.

- **Answer company lines:** Callers don't have to wait when the operator is busy with other calls. Company

lines are answered quickly and courteously by customized, automated greetings. If callers have a rotary phone or don't know the extension, they are directed to an operator for assistance.

- **Be available all of the time**: Callers can reach Stratagy from any tone dialing telephone 24-hours-a-day, 365-days-a-year.
- **Provides callers with information:** Callers may receive recorded information such as the company address, directions, product specifications or service offerings and price information (also described as an Audiotext feature). Menus make it easy for callers to get the information they need.
- **Call Routing**

  Once a call is answered by the Stratagy system, callers are routed to the extension, department, etc., they enter. If the extension number is not known, a company directory may be used by dialing a name.

  Stratagy can also be set up to direct rotary callers to a live assistant. Additionally, if the line is unanswered or busy, the call can be routed to another extension, to the company operator or to a personal operator set up for that particular mailbox (see Personal Operator in the Advanced Applications section.)

  If all extensions are unavailable, a caller can hold or hang up. If they hold, they may be placed in a queue. They are then periodically told of their position in the queue and can be offered options to hold for the next available assistant, leave a message or dial another extension.

  If a fax tone is detected, Stratagy, can automatically transfer to a fax machine connected to a telephone system extension.

TELEPHONE ANSWERING

Stratagy offers comprehensive message taking capabilities which provide telephone answering when an individual is busy or unavailable to answer the telephone.

Up to seven greetings per mailbox may be recorded and scheduled to play at various times of the day. This ensures coverage 24-hours-a-day, seven-days-a-week.

When extensions are busy or don't answer, Stratagy returns to the caller. Depending on how the mailbox is configured, the system states that the extension is busy or that the extension or person doesn't answer. The caller is offered the choices of leaving a private message, calling another extension, or reaching assistance.

VOICE MESSAGING

Stratagy voice messaging features allow users to create, send, receive and save voice messages. Users can access their messages from any tone dialing phone. Users can play, edit, replay and discard messages. They can also forward messages to additional users and perform many other voice messaging capabilities. In addition, Stratagy 24 users can perform many of the same features for fax messages as an option.

ADVANCED APPLICATIONS

The following is a partial list of the advanced applications supported by Stratagy. Refer to Chapter 4 of this General Description and the *Stratagy Feature Description Manual* for more information.

CALL QUEUING

When Stratagy tries a user's extension and finds that it is busy, it may offer the caller the option of either leaving a message or holding until the called extension becomes available. If the caller opts to hold, then Stratagy may play one or more pieces of "on-hold music" (which may, in fact, not be music at all, but instead it could consist of company, product, or other information). If more than one caller chooses to hold for the same extension, then Stratagy will queue the callers in the order that their calls were received. In addition to the "on-hold music," callers will be informed of their position in this queue.

FAX MESSAGING

A Stratagy 24 system may be optionally configured with one or two external fax modems. These modems may be used for a variety of purposes, including Fax Messaging. With Fax Messaging, the system accepts a fax document in place of a voice message. Just as with the voice recording, the fax is "recorded" and stored in the recipient's mailbox. When the user subsequently picks up messages, messages containing faxes will be identified to the user. If the user is calling from a fax machine (or other device capable of receiving a fax), then the user may request that the fax be transmitted (printed) on the same phone connection. Alternatively, the user may direct the Stratagy system to transmit the fax to another phone number with a separate phone call.

FAX ON DEMAND/FAXBACK

A Stratagy 24 system may optionally be configured with one or two fax modems. One use which can be made of these modems is to provide fax documents to callers. By using features similar to Audiotext as described in Chapter 4 of this General Description, the caller may select which fax document(s) are to be transmitted. The transmission may be done over the same phone call ("single-call"), or the Stratagy system may queue the fax for later transmission (a "two call" arrangement, which may make better use of a single fax modem). Depending on how the system is programmed, multiple fax documents may be transmitted in a single fax phone call.

FAX TONE DETECTION

The Stratagy Automated Attendant listens for incoming fax tone when answering incoming lines. If fax tone is detected Stratagy will transfer the fax call to the destination extension designated by the User ID of the connected fax machine.

INTERACTIVE VOICE RESPONSE (IVR)

The Stratagy 6 and Stratagy 24 systems provide a number of powerful features which allow it to be used for Interactive Voice Response (IVR) applications, in addition to Auto Attendant and Voice Messaging. Programming tokens exist which allow the system to prompt the user for input (using a custom prompt), wait for the user to enter a DTMF response, which will be stored into a variable, and then use that information to access a database to formulate a response. Databases may be on the hard disk of the Stratagy system, accessed remotely over a network, or accessed through the serial ports of the Stratagy system, possibly connecting to a mainframe or other data server. Queries can be constructed in a free-form fashion, by using data in variables that is entered by the caller.

Once a response has been determined from the database, the Stratagy system may be programmed to play this data back to the caller in a number of different ways: as a date, time, monetary value (in dollars and cents), or simply as a number. The value may be combined with other custom-recorded prompts, so that the system could, for example, respond to a caller with the message "Your order for 6 items will be shipped on July 17, 1994." The number six and the date in this example would be provided by the database, while the phrases "Your order for" and "items will be shipped on" would be recordings that the System Administrator would make.

MULTIPLE SYSTEM LANGUAGES

The Stratagy system can be configured with any of a number of different audio prompt files. The standard file provides prompts in American English. The default prompt file to use when a call first comes in can be configured, and with appropriate system programming, the caller can select a preferred language by entering DTMF digits. Thus, Stratagy can be communicating in different languages on different ports simultaneously.

Contact Product Marketing for the availability of other languages.

PERSONAL OPERATOR

The Stratagy system lets users specify a personal operator extension to provide live, personal call coverage when they are unavailable. If desired, callers can be automatically transferred to this extension, or can have the option of leaving a private message or being transferred to company operator assistance.

TOKEN PROGRAMMING

An important aspect of the Stratagy system is the Token Programming Language feature. While the Stratagy system allows easy configuration of User IDs for standard applications (Automated Attendant, Telephone Answering, Voice Messaging, dialing a standard extension, etc.), more sophisticated applications can be developed using the same concepts by making use of additional programming tokens. Besides the conventional DTMF digits, Stratagy supports over forty additional programming tokens. These tokens can perform functions as simple as a hook flash, and as complicated as sending a fax document in the background. But the real power of the Token Programming Language is that the tokens and the User IDs can be combined in new and sophisticated ways to provide application solutions.

REPORTING

The System Administrator may generate an almost unlimited number of different reports of system activity and programming. Reports can contain columns representing each of the fields of the User screen, and they can cover either all or a subset of User IDs in the system.

CHAPTER 4
FEATURES

OVERVIEW

This section presents an overview of all features that are available on Stratagy systems. All features are categorized as System, Administration, or User features. Some features apply to more than one category. See Table 4-1 for an alphabetical list of these features. Some features are not available on all Stratagy systems, see Table 4-2 for a list of these features.

In addition, Stratagy 24 systems support four out of five serial communication port (RS-232) options:

- Fax Modem 1
- Fax Modem 2
- Remote Maintenance
- IVR Host Connectivity
- SMDI Integration

A maximum of up to 4 of these options may be configured for each Stratagy 24 system.

SYSTEM FEATURES

AUDIOTEXT

Allows a caller to retrieve audio information from the Stratagy system. To obtain this information, the caller merely enters DTMF digits, as directed by audio prompts, and the appropriate information is then played. This information could consist of general information about the company, such as its address, phone number, fax number, etc., or it could include specific product descriptions or other information that may be of interest to callers.

AUTOMATED ATTENDANT

The Stratagy system answers incoming lines and allows callers to route their own calls. The caller merely enters the User ID of the desired party. If that User ID is recognized by the system, then the call will be handled according to the configuration of that User ID. This configuration may direct the Stratagy system to dial an extension and, possibly after performing Call Screening, pass the call on to the user. If the user is in Do Not Disturb mode, then Stratagy may play a prerecorded greeting and record a message from the caller.

AUTOMATED DIRECTORY

The Stratagy Automated Directory allows a caller to enter DTMF digits corresponding to the first few letters of a user's first or last name. Stratagy will then play back the recorded spoken name and extension of each User ID that matches the entered digits.

AUTOMATIC GAIN CONTROL

While recording a message from a caller or user, Stratagy can perform Automatic Gain Control (AGC). AGC helps to compensate for variations in voice volume, telephone handsets, and other factors which can cause messages to be recorded at low or varying volumes. A message recorded using AGC will be played back at a consistent, standard volume level. This means that the user playing back messages will not have to constantly adjust the playback volume.

CALL QUEUING

When Stratagy tries a user's extension and finds that it is busy, it may offer the caller the option of either leaving a message or holding until the called extension becomes available. If the caller opts to hold, then Stratagy may play one or more pieces of "on-hold music" (which may, in fact, not be music at all, but instead it could consist of company, product, or other information). If more than one caller chooses to hold for the same extension, then Stratagy will queue the callers in the order that their calls were received. In addition to the "on-hold music," callers will be informed of their position in this queue.

CALL TRANSFER

The Stratagy Automated Attendant call routing capability provides for a supervised or blind and other types of call transfers to the destination extension in the telephone system. All Stratagy system call transfers are controlled by User IDs and the extension field. Entering just the destination extension into the extension field will cause a supervised call transfer. Other call transfer types are implemented with Tokens.

CALLER CONFIRMATION PRIOR TO TRANSFERRING

When a caller stays on the line and does not enter any DTMF digits, the Stratagy system assumes that the caller is using a rotary phone. Therefore, the call will be transferred to the operator for live assistance. It is also possible that the caller has hung up, but for some reason the telephone system has not detected the hangup. Therefore, Stratagy can be configured to ask the caller to confirm orally that someone is still on the line before transferring to the operator. Stratagy may be configured to hang up if there is no response.

DISK REDUNDANCY

A Stratagy 24 system may be optionally configured with two hard disks, rather than the standard single hard disk. Under special software control, the contents of the second hard disk will be an exact duplicate of the first hard disk. This duplication is performed in real time as changes are made to the primary hard disk (recordings are made, settings changed, messages deleted, etc.). Should the primary hard disk develop a bad sector, the secondary hard disk is then automatically used.

DUAL INTEGRATION

Normally, all of a Stratagy system's ports will be attached to a single telephone system. But it is possible to configure both the Stratagy 6 and the Stratagy 24 systems on a per-port basis to work with two different telephone systems simultaneously (two systems with Inband Integration or one system with Inband Integration and one system with SMDI/RS232 Integration). Because the system can operate with different telephone systems simultaneously, it is appropriate for use in offices where, possibly, two different companies, with two different phone systems, would like to share the costs and benefits of a single Stratagy system.

FAX MESSAGING

A Stratagy 24 system may be optionally configured with one or two external fax modems. These modems may be used for a variety of purposes, including Fax Messaging. With Fax Messaging, the system accepts a fax document in place of a voice message. Just as with the voice recording, the fax is "recorded" and stored in the recipient's mailbox. When the user subsequently picks up messages, messages containing faxs will be identified to the user. If the user is calling from a fax machine (or other device capable of receiving a fax), then the user may request that the fax be transmitted (printed) on the same phone connection. Alternatively, the user may direct the Stratagy system to transmit the fax to another phone number with a separate phone call.

FAX ON DEMAND/FAXBACK

A Stratagy 24 system may optionally be configured with one or two fax modems. One use which can be made of these modems is to provide fax documents to callers. By using features similar to Audiotext, the caller may select which fax document(s) are to be transmitted. The transmission may be done over the same phone call ("single-call"), or the Stratagy system may queue the fax for later transmission (a "two call" arrangement, which may make better use of a single fax modem). Depending on how the system is programmed, multiple fax documents may be transmitted in a single fax phone call.

FAX TONE DETECTION

The Stratagy Automated Attendant listens for incoming fax tone when answering incoming lines. If fax tone is detected, Stratagy will transfer the fax call to the destination extension designated by the User ID of the connected fax machine.

GREETING RESTART

After a caller has left a voice message for a User ID, the call may either be transferred back to the initial "company" greeting User ID or the system may say "Thank you for calling, Good-bye" and disconnect. Callers often appreciate the ability to return to the User's Main Menu so that they can leave a message for another system user.

INBAND INTEGRATION

Many telephone systems (PBXs) can be configured to provide information to the Stratagy system about an incoming call by preceding it with one or more DTMF digits. These DTMF strings are known as Inband Integration or Inband Signaling. The Stratagy system can be configured to receive and interpret these DTMF strings. With this information, the Stratagy system may answer the call with a company greeting, direct the call to begin recording a message for a user who is unavailable, etc. Data is passed in both directions: the PBX informs the auto attendant/voice mail system about each incoming call, and the voice mail system can send instructions to the PBX to turn message waiting lights on or off, as appropriate.

INTERACTIVE VOICE RESPONSE (IVR)

The Stratagy 6 and Stratagy 24 systems provide a number of powerful features which allow them to be used for Interactive Voice Response (IVR) applications, in addition to Auto Attendant and Voice Messaging. There are programming tokens which allow the system to prompt the user for input (using a custom prompt), wait for the user to enter a DTMF response, which will be stored into a variable, and then use that information to access a database to formulate a response. Databases may be on the hard disk of the Stratagy system, accessed remotely over a network, or accessed through the serial ports of the Stratagy system, possibly connecting to a mainframe or other data server. Queries can be constructed in a free-form fashion, by using data in variables that is entered by the caller.

Once a response has been determined from the database, the Stratagy system may be programmed to play this data back to the caller in a number of different ways: as a date, time, monetary value (in dollars and cents), or simply as a number. The value may be combined with other custom-recorded

prompts, so that the system could, for example, respond to a caller with the message "Your order for 6 items will be shipped on July 17, 1994." The number six and the date in this example would be provided by the database, while the phrases "Your order for" and "items will be shipped on" would be recordings that the System Administrator would make.

MULTIPLE SYSTEM LANGUAGES

The Stratagy system can be configured with any of a number of different audio prompt files. The standard file provides prompts in American English. The default prompt file to use when a call first comes in can be configured, and with appropriate system programming, the caller can select a preferred language by entering DTMF digits. Thus, Stratagy can be communicating in different languages on different ports simultaneously.

Contact Product Marketing for the availability of other languages.

PORT-SELECTABLE GREETINGS

The Stratagy system may be configured to begin processing new calls by starting with a given User ID. New callers will first hear the greeting recorded for this User ID. Each different audio port in the Stratagy system may be configured to begin processing with a different port, and thus different ports may hear different initial greetings, which may have different menu options available, which may follow different processing paths, etc., depending on how the User IDs are programmed. This feature might be used, for example, by two companies sharing the same Stratagy system.

REMOTE ADMINISTRATION

An optional external 2400 baud modem is required for this feature on all Stratagy systems. The remote administrator has full screen access to the system, protected by two different passwords, with every system feature available. The remote administrator may use this feature at any time simply by dialing into the system from any PC running the Stratagy remote access software and with an appropriate modem.

SAFE MESSAGE PURGING

The Stratagy system may be configured to "purge" messages some time after they have been heard. This time period is a system configuration parameter expressed in days. The default value for this parameter is 0, meaning that no purging will ever be performed. The purge parameter is system-wide. Stratagy performs the purge on a per-User ID basis, only when the user is logging out of the system. When the user logs into the system, Stratagy announces the number of messages in the User ID that are to be purged, if any. This gives the user ample warning that the messages will be deleted upon logout. Messages are never purged at any other time. Messages that have not been heard are never purged, no matter how old they are.

SMDI/RS-232 INTEGRATION

SMDI integration is available on both Stratagy 6 and Stratagy 24 systems. SMDI is an industry standard method of integrating a PBX with Voice Mail and other peripheral systems. This interconnection is made via RS-232 data connections dependent upon the PBX capabilities. Data is passed in both directions: the PBX informs the auto attendant/voice mail system about each incoming call, and the voice mail system can send instructions to the PBX to turn message waiting lights on or off, as appropriate.

SYSTEM BACKUP

This feature allows customer configuration database information, greetings, and messages to be backed-up onto floppy diskettes. Database information, greetings, and messages may be backed-up individually or in various combinations. Stratagy will estimate the number of floppy diskettes required for the System Backup procedures.

TOKEN PROGRAMMING

An important aspect of the Stratagy system is the Token Programming feature. While the Stratagy system allows easy configuration of User IDs for standard features (Audiotext, Automated Attendant, Voice Messaging, dialing a standard extension, etc.), more sophisticated applications can be developed using the same concepts, by making use of additional programming tokens. Besides the conventional DTMF digits, Stratagy supports over forty additional programming tokens. These tokens can perform functions as simple as a hook flash, and as complicated as sending a fax document in the background. But the real power of the Token Programming Language is that the tokens and the User IDs can be combined in new and sophisticated ways to provide application solutions.

TOSHIBA PLUG AND PLAY

Stratagy systems have been preconfigured for out of box plug and play use with certain Toshiba telephone systems: Stratagy 4 with Strata DK 8, Stratagy 6 with Strata DK16, and Stratagy 24 with Strata DK 280 A. The installer does not have to understand or program inband integration strings, ringback patterns, or make other system configuration changes. In addition the above Strata DK default extension numbers are also preprogrammed in Stratagy as the User ID and

extension numbers, plus default user parameters. Complete integration with other Toshiba telephone systems (without default User IDs and extension mailbox installations) is available from a menu.

UNIVERSAL PORTS

Frequently, notification is performed by dialing out on one of the Stratagy audio ports, perhaps to send a page or light a message waiting light by transmitting the correct sequence of DTMF codes. Stratagy provides several methods of allocating audio ports for the notification process. With the first method, one or more ports are dedicated to perform out dialing for notification. This method has the advantage that there can never be a collision between dialing out to perform a notification and an incoming call which happens to be routed to the same port at the same time. With the second method, all of the Stratagy ports are configured to accept incoming calls, but Stratagy can also use any one of them which is not currently in use to perform an outdial. This method has a clear advantage over the first, particularly for small systems with only a limited total number of ports. However, it introduces the possibility of a collision. The third method is similar to the second, except that Stratagy is restricted to choosing only one particular port to perform notifications. Should that one port be busy, then Stratagy will wait until it is free rather than use one of the remaining ports.

UNLIMITED USER IDS

The Stratagy system provides User IDs of up to eight digits, or 100 million different possible User IDs. User IDs may be prefixes of other User IDs. That is, both "111" and "1111" could be separate User IDs, and both could be used by the system. Thus, no User IDs are ever precluded. Stratagy uses a very efficient method of accessing its database, so that system response is not diminished when the database contains a very large number of User IDs. No matter how large a Stratagy system might grow to be, it likely will never run out of available User IDs.

VARIED SAMPLING RATES

The Stratagy system may be configured to make different types of recordings at different "sampling rates." In general, the higher the sampling rate, the more accurate the digital recording of the incoming sound will be, and thus, the better the reproduction. However, using a high sampling rate means that more disk space will be consumed for a given recording. Because companies wish to present the best possible "appearance" to their callers, and because greetings usually represent only a small fraction of the system's disk space, Stratagy systems are configured to record greetings at a higher sampling rate (64K) than regular voice messages (32K). However, the sampling rate for greetings and for voice message recordings can be individually set during system installation and configuration by the System Administrator.

VOICE MESSAGING

In addition to the Automated Attendant feature, each Stratagy system includes Voice Messaging. Each User ID may be configured to store messages individually. Voice Messaging functions may be controlled by the System Administrator or the individual user. See both Administration and User Features for details.

ADMINISTRATION FEATURES

IMPORTANT NOTE:

Stratagy 4 and Stratagy 6 systems require a laptop computer with Stratagy remote software installed to perform all Administration Features locally or remotely (using an optional external modem). The Stratagy 24 system may perform all Administration Features in the same manner as above or use the keyboard and monitor supplied with the system. Refer to the Stratagy Installation and Maintenance manual for details.

AUTOMATIC MESSAGE COPY

Each User ID "A" can be configured to place a copy of any message received into a separate User ID "B's" queue of messages. User ID "A" will retain a copy of each message. Messages sent directly to "B" remain unaffected.

AUTOMATIC MESSAGE COPY WITH DELETE

This feature is very similar to Automatic Message Copy. When activated, a User ID "A" is configured so that any messages received will be copied to User ID "B." Furthermore, "A" is configured not to store messages at all. This means that the copy of each message sent to "B" is in reality the only copy of the message in the system. Messages sent directly to "B" would not be affected by this change, nor would any messages already stored in "A."

AUTOMATIC MESSAGE DATE/TIME CONTROL

The System Administrator may configure each User ID or group of User ID's to automatically play the date and time of each message before playing the "body" (contents) of the message.

BUSY GREETING LENGTH CONTROL

The System Administrator may specify each User ID maximum length of time in seconds for the custom busy greeting which the user may record. This feature may be used to limit the total time (and thus, system disk space) which can be used for busy greetings. Setting this field to zero prevents the user from recording or changing a custom busy greeting.

CALLED IDENTIFICATION

Allows one person to answer for both "Sales" and "Service" calls. The person who answers the call will know how to greet each caller, since they will hear "Sales" or "Service" before being connected to the caller. Message Pooling could also be used in this case, since this person would presumably like all messages left after hours to be stored in a single User ID, rather than have to check multiple User IDs for messages. The System Administrator sets this feature on a per User ID basis.

CHAINING

Stratagy's chaining feature allows 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 (if the User ID is not configured in Do Not Disturb mode). The System Administrator may define each of the three possible chaining conditions: Busy, Ring No Answer (RNA), or Done. Combined with Stratagy's Token Programming Language, this feature allows sophisticated call processing and IVR applications to be created.

COPY RANGE

The Copy Range feature allows the System Administrator to copy one existing User ID to create a number of new User IDs, each within a defined range of ID numbers.

DIRECTORY CONTROL

Each User ID may have Automated Directory names entered by the System Administrator. Some users may not wish to be listed in the Automated Directory. Furthermore, some User IDs are used for special purposes, and they should not appear in the directory listings. Such User IDs would include "back door" access numbers, User IDs used purely for Stratagy programming, etc. The Automated Directory allows callers to determine the correct extension for someone by entering the DTMF digits which correspond to the first few letters of the name.

DISK SPACE NOTIFICATION

The Stratagy system can be configured to send an automatic notification whenever system disk space falls below a defined threshold. During system installation and configuration, the System Administrator defines the percentage of disk space remaining below which the disk notification should be activated. Under normal conditions, the system is checked automatically once per hour to determine the remaining disk space storage.

GREETING LENGTH CONTROL

The System Administrator may determine the maximum recording time, in seconds, for the seven different greetings of each User ID. This feature may be used to limit the total time (and thus, system disk space) which can be allotted for user greetings. Setting this field to zero prevents the user from recording or changing the "current" user greeting.

GROUP PARTITIONS - CALL BLOCKING

Each User ID may belong to as many as four different "groups." The System Administrator defines the group(s) to which a User ID belongs. When the Stratagy system transfers a call to a new User ID, it

first determines if that User ID has any groups in common with the current User ID. If it does, then the transfer of processing to the new User ID will proceed. Otherwise, Stratagy will switch to a default User ID for processing based on the current system port number, blocking or rerouting the call. Group Partitions are most often used to control Guest User IDs and Shared Tenant applications.

GUEST USERS LIMIT

Each user of the Stratagy system may potentially create one or more Guest User IDs. These User IDs might be used by that person's customers, friends, clients, etc. They can be deleted by the same user who created them or by the System Administrator. The System Administrator can also limit the number of Guest User IDs which a particular User ID is allowed to create.

MESSAGE LENGTH CONTROL

The System Administrator can set the maximum Message Length in seconds of each incoming message for a given User ID, or messages may be unlimited in length. If a caller attempts to leave a message longer than the maximum, the system will stop recording and inform the caller that the maximum message length has been reached.

MESSAGE NOTIFICATION

Stratagy allows each User ID to have up to ten different programmable notification records. The System Administrator programs the notification records of each User ID with a specific notification method such as lights, stutter dialtone, pagers, voice, etc., for the times of the day and the days of the week and the repeat count and interval for retrying that notification. Each notification method is a flexible dial string allowing the Stratagy system to be used with almost any kind of PBX or notification method including cascade notification.

MULTIPLE DIRECTORY NAMES

Each User ID can have associated with it up to two different names. These names are entered into the Stratagy system's automatic directory by the System Administrator. Each User (Extension) may have more than one User ID to improve the Automated Directory for commonly misspelled names. The Automated Directory can allow callers to determine the correct extension for someone by entering the DTMF digits which correspond to the first few letters of either one of the two (or more) different names. Thus, normally, the two different directory names will be the first and last names of the user associated with each User ID.

NAME AND EXTENSION CONTROL

Normally, a user may record a "spoken name"—a recording of the user's name and extension. The System Administrator, however, can configure User IDs on an individual basis so that a user cannot record, or change the recorded name and extension. If no name and extension has been recorded for a User ID, then the Stratagy system will play "User ID..." followed by the number of that User ID.

PROGRAMMABLE DIAL ACTIONS

The Stratagy system will attempt to dial the string specified in the Extension field. This string may consist simply of the extension number of the user, in which case Stratagy will dial that extension and continue processing based on the results of that call if not in the Do Not Disturb mode. But the extension field may actually contain many more "programming tokens" which can have effects ranging from the simple (such as performing a hook flash) to the complex (accept an incoming fax for the current user). These programming tokens can be combined by the System Administrator in a desired way to create an almost unlimited number of application solutions.

REAL-TIME SCREEN INFORMATION

The Administrator's Main Menu on each Stratagy 24 system shows, among other things, the activity on each audio port, the activity of any connected fax modems, the amount of free disk space, etc. The Stratagy 24 system helps the System Administrator better understand and manage the system as changes occur. This information is instantly updated as long as the Main Menu is displayed.

RELAY PAGING

Relay Paging streamlines Message Notification permitting the caller to enter a phone number while the user's greeting is being played. The Stratagy system still pages the user, but instead of displaying the usual information, only the phone number entered by the caller is displayed on the pager. The System Administrator may enable this feature individually for each User ID. This allows the user to return the call much sooner by not calling into the Stratagy system since no voice mail message is left.

REPORTS

The System Administrator may generate an almost unlimited number of different reports of system activity and programming. Reports can contain columns representing each of the fields of the User screen, and they can cover either all or a subset of User IDs in the system.

RING DURATION

The System Administrator may define, on a per-User ID basis, how many rings of that user's extension the Stratagy system should wait before concluding that the user is unavailable (Ring No Answer, or RNA). Then the Stratagy system can send callers to voice mail to leave a message. This value may also be changed automatically via the Auto Scheduler, again on a per-User ID basis.

SCREEN SAVER

Standard feature on Stratagy 24 systems. Video monitors, such as those used as the console display of the Stratagy 24 system, should not have the same image displayed on them constantly. Such an image can become "burned in" on the phosphor display, and it will then be visible even when other information is being displayed—the monitor is then permanently damaged. To avoid burn-in, the Stratagy system can be configured to blank the screen automatically after a predetermined period of keyboard inactivity. As soon as something is again typed on the keyboard, however, the screen is instantly reactivated, and any information which would have been on the screen is made visible.

SHARED EXTENSIONS

This feature is typically used when more than one person, each with a separate Stratagy User ID, shares a single phone extension. If the call is answered, the called name is announced. If not answered, a private message may be recorded. Stratagy announces "This call is for..." followed by the recorded name of the called User ID. The System Administrator sets this feature on a per User ID basis. In addition, the System Administrator may also turn on the Call Screening feature to enhance this feature.

SINGLE-DIGIT MENUS

Each User ID may define one or more single-digit menu keys. If a caller enters one of these DTMF digits while listening to the greeting for that User ID, then Stratagy will immediately transfer processing to the User ID associated with that menu item rather than process the digit as part of another User ID number. The System Administrator defines the single-digit menu numbers for each User ID.

SCHEDULED AUDIOTEXT

The Stratagy Auto Scheduler can be used to implement Audiotext with a combination of single-digit menus and greeting recordings. The System Administrator would record the greetings in each of the applicable User Ids and configure the system to change the Audiotext contents on an automatic, scheduled basis.

SCHEDULED COMPANY GREETINGS

The System Administrator may program the company greetings using the Stratagy Auto Scheduler to make changes based on the time of day or day of week. The changes can include the current greeting number, extension, Do Not Disturb setting, etc.

SYSTEM DISTRIBUTION LISTS

In addition to personal distribution lists, Stratagy supports system-wide distribution lists. A user sends a message to a system distribution list rather than a personal distribution list by prepending a * to the list number. The "list comment" for the selected system list is played to confirm that the right list has been chosen, just as with personal distribution lists. The System Administrator creates the system Distribution Lists using the same method as the personal lists, but for the System Administrator User ID.

URGENT MESSAGE NOTIFICATION

The System Administrator programs the notification type set to URGENT. When a message marked Urgent is received, then the Stratagy system first checks if one or more notification records exist for that User ID with notification type URGENT. If so, then those records are activated, and otherwise, any NORMAL notification records are used. Users might, for example, want to be notified by pager only when an Urgent message arrives.

USER OPTION LOCKS

Many user options can normally be changed by users themselves by selecting the appropriate DTMF commands over the telephone, such as toggling the Do Not Disturb attribute, changing the current greeting number, toggling Call Screening, etc. The System Administrator can disallow a user from changing each of these settings on an individual basis.

VOICE FORMS

The Stratagy system can be configured to prompt a caller with a series of questions. The voice responses that the caller gives are then concatenated and are stored as a single message in the associated User ID. The Voice Forms feature is activated by the System Administrator simply by using the "Q" (Question and Answer) token when programming the User ID. Each question is recorded as a greeting, either in that User ID or in others. The "Q" token specifies which greetings should be played to callers and the order in which they should be played.

USER FEATURES

BUSY GREETING

When a caller is directed to an extension which is busy, Stratagy can play a recorded greeting specific to this situation. The default is that the system will play a standard system busy greeting that says "That extension is busy, to hold press *, to try another extension enter it now, to leave a message please stay on the line," but users may record their own custom busy greetings that will be played instead.

CALL QUEUING

When Stratagy tries a user's extension and finds that it is busy, it may offer the caller the option of either leaving a message or holding until the called extension becomes available. If the caller opts to hold, then Stratagy may play one or more pieces of "on-hold music" (which may, in fact, not be music at all, but instead it could consist of company, product, or other information). If more than one caller chooses to hold for the same extension, then Stratagy will queue the callers in the order that their calls were received. In addition to the "on-hold music," callers will be informed of their position in this queue.

CALL SCREENING

Each User ID may be configured for call screening. Whenever a caller enters the User ID of the user with call screening enabled, the system will request that the caller say their name and company name. Stratagy records this information, dials the extension of the user, and announces that this caller is on the line by playing the recording. The called user may then enter DTMF digits to indicate that the call should be accepted or rejected; rejected callers are directed to leave a voice mail message for the user. Also see Scheduled Call Screening.

CONTINUOUS MESSAGE DELETE

This feature is used in conjunction with the Continuous Message Playback feature. It allows a user to enter a DTMF command that will delete a number of messages at once. The number of messages that will be deleted is variable; it is the maximum number of messages whose cumulative length is less than a predetermined number of minutes. For example, this feature may be used by transcription services which are accustomed to working from audio tape recordings rather than directly from voice mail recordings.

CONTINUOUS MESSAGE PLAYBACK

This feature is used in conjunction with the Continuous Message Delete feature. It allows a user to enter a DTMF command which will play back a number of messages at once, without stopping between each message. The number of messages that will be played is variable; it is the maximum number of messages whose cumulative length is less than a predetermined number of minutes. For example, this feature may be used by transcription services which are accustomed to working from audio tape recordings rather than directly from voice mail recordings.

DO NOT DISTURB

When a caller enters the number of a User ID, Stratagy normally tries dialing the extension given in that user's Extension field to determine if the called extension is available. When the Stratagy Do Not Disturb feature is activated, however, Stratagy will not dial the Extension field, but instead the call will be processed as if the called extension is not available (Ring No Answer), and the caller will be offered the chance to leave a voice mail for the user (provided that the User ID is configured to accept messages).

FAX MESSAGE IMMEDIATE RETRIEVE

An optional feature on Stratagy 24 systems is to attach one or two fax modems. These modems may then be configured for a number of different purposes, including accepting fax mail for users in addition to voice mail. When a user has received a message containing a fax, the message may be retrieved in one of two ways: Fax Message Immediate Retrieve and Fax Message Send Retrieve. In the case of Immediate Retrieve, the user calls into the Stratagy 24 system from a fax machine with a handset (or other device capable of receiving a fax where prompts can be heard and DTMF tones transmitted). The user reviews the message normally. When the fax message is played, the user is prompted that the message contains a fax, and the number of pages of the fax. If the user then chooses the Immediate Retrieve option, the user is prompted to press the Start key on the fax machine, and Stratagy begins transmitting the fax over the connection. When the fax has been transmitted, the call is disconnected.

FAX MESSAGE SEND RETRIEVE

An optional feature on Stratagy 24 systems is to attach one or two fax modems. These modems may then be configured for a number of different purposes, including accepting fax mail for users in addition to voice mail. When a user has received a message containing a fax, the message may be retrieved in one of two ways: Fax Message Immediate Retrieve and Fax Message Send Retrieve. In the case of Fax Message Send Retrieve,

the user calls into the Stratagy 24 system from a DTMF telephone and reviews messages normally. When the fax message is played, the user is prompted that the message contains a fax, and the number of pages of the fax. The user then chooses the Fax Message Send Retrieve option, and is then prompted to enter the phone number of a fax machine, such as a machine made available by a hotel. The fax message is then queued for immediate delivery to this fax number, and the user may continue processing messages as before. A number of fax messages might be queued during one call. Each of them will be sent separately to the indicated phone number(s), with automatic retry if the destination fax machine is busy or does not answer.

FUTURE DELIVERY

A user may create a message, address the message and then mark it for future delivery to another user. The message is not delivered until the date and time entered by the sending user has been reached by the system clock.

GUEST USERS

A User ID may be permitted to create one or more guest users, up to a maximum permitted number of guests. Stratagy users frequently use this feature to create guest IDs for their clients, so that they may exchange confidential information easily. Guest users are generally restricted by the group mechanism to exchanging voice mail only with the user who created the Guest ID, though this is under control of the System Administrator.

MESSAGE DATE AND TIME BY REQUEST

Stratagy normally plays the date and time when a message was recorded just before playing back the message to the user. After hearing the message, the user may want to be reminded of the time of the message, and this information may be requested by entering a DTMF command. Furthermore, if the User ID is configured not to play the date and time of each message automatically, the user may use this feature to find out the date/time of a particular message.

MESSAGE FORWARDING

The Message Forwarding feature allows a user to send a message that has already been received to one or more other users of the Stratagy system. In forwarding the message, the original user may optionally record comments that explains to the new recipient(s) why the message is being forwarded to them. However, a message may not be forwarded to another user who does not share a common group number with the sending user or if the original message is marked "private".

MESSAGE NOTIFICATION

Stratagy allows each User ID to have up to ten different notification records (Message waiting lights, stutter dialtone, pagers, voice, etc.). Each notification record specifies a notification method and the times of the day and the days of the week when that notification record is applicable, and the repeat count and interval for retrying that notification. Each notification method is a flexible dial string allowing the Stratagy system to be used with almost any kind of PBX or notification method including cascade notification.

MESSAGE PLAYBACK CONTROL

While playing back a message, a user may wish to skip backwards in the message, or skip forwards to get to a relevant piece of information contained in the message. Message Playback Control allows the user to do this at anytime while a message is being played by pressing the appropriate keys on a DTMF telephone dial pad.

MESSAGE PAUSE DURING PLAYBACK

While playing back a voice mail message, a user may pause the playback for up to thirty seconds by pressing the appropriate key on the DTMF telephone dial pad at any time. Pressing the key again before the thirty seconds has transpired will cause playback to resume immediately. While the playback is paused, Stratagy is silent.

MESSAGE RECEIPT VERIFICATION

When a user sends a voice message to another user, either by originating a new message or by forwarding an existing message, the sending user may request receipt verification. When the recipient of such a message plays that message, Stratagy will automatically send a message back to the sender, informing the user that the message has been received. The recipient cannot disable this behavior nor can the recipient tell that receipt verification was requested for any particular message.

MESSAGE RETRIEVAL CONTROL

When a user is reviewing messages which have been recorded, a number of different "presentation orders" may be used. By default, Stratagy plays messages back in the order received (in "FIFO" first-in first-out order), with the exception that messages marked Urgent are placed in the front of the message queue. The user may instead play the messages back in reverse order, from most recent to least recent ("LIFO" last-in first-out order). Finally, the user may also elect to have the system play only messages which have not yet been heard, in chronological order.

MESSAGE UNDELETE

As users listen to their messages, they may mark messages for deletion. The messages are not really deleted at that point; they will be deleted when the user leaves message management and returns to the User's Main Menu. In the meantime, the user may "undelete" a message by entering a DTMF command. In actuality, of course, the user is merely unmarking the message for deletion. Once the user returns to the User's Main Menu, though, messages which were deleted are actually gone, and there is no way to retrieve them.

MESSAGE VOLUME CONTROL

The Stratagy system permits real-time volume control of messages during playback. While listening to messages, a user may press the appropriate DTMF keys on the telephone dial pad to increase or decrease the volume. There are a total of sixteen steps for volume control. Each step increases or decreases the playback volume by 3db. The system is defaulted to the middle position allowing eight steps in either direction.

OFFICE PAGING

This feature allows individual users to receive a page over the office telephone system or overhead paging system automatically via the Stratagy system. Stratagy will place the call on hold or park and make a pre-recorded page announcement using the DTMF access codes. The System Administrator configures this feature for each User ID using tokens.

PAGING FOR URGENT CALLS

One of the notification types available in Stratagy's flexible notification feature is reserved only for messages marked Urgent by the message sender. The System Administrator may choose to use pager notification for a user only when that user receives an urgent call, and other notification methods for normal calls.

PERSONAL DISTRIBUTION LISTS

Users may define up to seven different distribution lists consisting of other system users. There is no limit, other than system disk space, on the number of users who may be a member of any particular distribution list. The user who owns the list may add or delete members at any time. When a user creates a Personal Distribution List, the user may record a "list comment" which gives each list a descriptive name or title. When the user selects the list when sending, the list comment is played back to confirm that the correct distribution list has been chosen.

PERSONAL GREETINGS

Normally, each user may record up to seven different personal greetings. At any one time, only one of these greetings will be in effect, and will be played when the user is busy or unavailable. Once the greetings have been recorded, the user may switch between the different greetings simply by entering the greeting number, and may at that point optionally review or re-record a particular greeting. The user may also select the default system greeting instead of a customized greeting.

PRIVATE MESSAGES

When a caller or a user sends a message to a system user, the message may be given special attributes, Urgent and/or Private. A Private message is one which may not be forwarded by the recipient to any other user. The recipient will be informed if a message has the Urgent or Private attribute set.

PROTECTED SECURITY CODE

Each User ID in the Stratagy system may be given a security code. Before anyone can "log into" that User ID, which allows access to its messages, settings, greetings, etc., this security code must be entered by the caller. Once logged in, a user may change the security code, subject to the minimum length restriction which may be set by the System Administrator, maximum length is 16 digits. The System Administrator specifies the initial security code for each User ID. The administrator may also change the security code at any time, but the administrator cannot find out what the current security code is for any existing User ID.

RELAY PAGING

Relay Paging streamlines Message Notification permitting the caller to enter a phone number while the user's greeting is being played. The Stratagy system still pages the user, but instead of displaying the usual information, only the phone number entered by the caller is displayed on the pager. This allows the user to return the call much sooner by not calling into the Stratagy system since no voice mail message is left.

SCHEDULED CALL SCREENING

The Stratagy Auto Scheduler allows various parameters of each User ID to be changed automatically at pre-scheduled days and times. One such feature is the Call Screening option. A User ID may be configured to switch automatically to Call Screening mode during certain hours of the day, or on certain days of the week (or any combination). See Call Screening for more details.

SCHEDULED DO NOT DISTURB

The Stratagy Auto Scheduler allows various parameters of each User ID to be changed automatically at pre-scheduled days and times. One such feature is the Do Not Disturb option. A User ID may be configured to turn this option on or off automatically at pre-scheduled times and/or days of the week. See Do Not Disturb for more details.

SCHEDULED EXTENSIONS

The Stratagy Auto Scheduler permits several attributes of a User ID to be changed on an automatically scheduled basis. One of these attributes is the Extension field. A User ID may be configured to change the Extension field automatically at a certain time and/or day. Two such Auto Scheduler records could be used to toggle the Extension field between two different values. Automatically scheduled Extension changes might be useful, for example, for a user who works from two different locations on a regular basis. The Stratagy system could be programmed to ring the phone at the correct location automatically, without the need for the user to enter any call forwarding information manually each time the user moves to a different location.

SCHEDULED GREETINGS

The Stratagy Auto Scheduler allows several options, or attributes, of a User ID to be changed on a regular, pre-scheduled basis. These attributes can be set to change on certain days of the week, times of day, or based on the date. The greeting number for the User ID is one of these attributes which can be changed automatically. See Personal Greetings for more detail.

SCHEDULED MESSAGE NOTIFICATION

One of the many features of Stratagy's flexible message notification system is the ability to configure the applicable time and day for each notification record. Notifications can be set to occur only during certain hours, on only certain days of the week, or any combination thereof. See Message Notification for more details.

SCHEDULED RING DURATION

The Stratagy Auto Scheduler allows several options, or attributes, of a User ID to be changed on a regular, pre-scheduled basis. These attributes can be set to change on certain days of the week, times of day, or based on the date. The ring duration for the User ID is one of these attributes which can be changed automatically. See Administration Features - Ring Duration for more details.

SINGLE-DIGIT MENUS

While a user's greeting is being played, a caller may enter a Single-Digit Menu that allows the caller to select an option, such as Audiotext, a personal assistant, call queuing or the operator, etc. When the caller enters one of the defined single-digit menu keys, the system will process the User ID associated with that menu item. Each User ID may have an individual Personal Single-Digit Menu.

SINGLE-DIGIT MESSAGE REPLY

If one Stratagy user sends voice mail to another user, then the recipient can send a reply message to the original sender without having to reenter the sender's User ID. While listening to messages, the DTMF command to Send a Message also functions as a Reply command by filling in the "from" information in the current message as the "to" information of the new message. If the recipient is not replying, but instead is sending a brand new message, then the user can simply enter that other User ID, overwriting the default that was filled in automatically.

URGENT MESSAGES

When a caller or a user sends a message to a system user, the message may be given special attributes, Urgent and/or Private. The recipient will be informed if a message has the Urgent or Private attribute set. Furthermore, Urgent messages have two special attributes. First, when an Urgent message is received by a User ID, it is placed at the beginning of that User ID's message queue. When the messages are reviewed by the user, messages marked Urgent are always played back first, regardless of the message retrieval order selected by the user. The second special feature of Urgent messages is that there is an Urgent notification type. This allows users to be notified differently for urgent messages than they are when normal messages are received. In fact, a user might have no notification set up at all for normal messages, but might have Pager Notification configured for urgent messages.

STRATAGY FEATURES	SYSTEM	ADMIN	USER
Audiotext	✓		✓
Automated Attendant	✓		
Automated Directory	✓		✓
Automatic Gain Control	✓		
Automatic Message Copy		✓	✓
Automatic Message Copy with Delete		✓	✓
Automatic Message Date/Time Control		✓	✓
Busy Greeting			✓
Busy Message Length Control		✓	
Called Identification		✓	✓
Call Queuing	✓		✓
Call Screening			✓
Call Transfer	✓		
Caller Confirmation Prior to Transferring	✓		
Chaining		✓	
Continuous Message Delete			✓
Continuous Message Playback			✓
Copy Range		✓	
Directory Control		✓	
Disk Redundancy	✓		
Disk Space Notification		✓	
Do Not Disturb			✓
Dual Integration	✓		
Fax Message Immediate Retrieve			✓
Fax Messaging	✓		✓
Fax Message Send Retrieve			✓
Fax on Demand/FAXback	✓		✓
Fax Tone Detection	✓		
Greeting Length Control		✓	
Greeting Restart	✓	✓	✓
Group Partitions		✓	✓
Guest Users		✓	✓
Guest Users Limit		✓	
Inband Integration	✓		
Interactive Voice Response (IVR)	✓		✓
Message Date and Time by Request			✓
Message Forwarding			✓
Message Length Control		✓	✓
Message Notification		✓	✓

Table 4-1
Stratagy Features

STRATAGY FEATURES	SYSTEM	ADMIN	USER
Message Playback Control			✓
Message Pause During Playback			✓
Message Receipt Verification			✓
Message Retrieval Control			✓
Message Undelete			✓
Message Volume Control			✓
Multiple System Languages	✓	✓	
Multiple Directory Names		✓	✓
Name and Extension Control		✓	
Office Paging		✓	✓
Paging for Urgent Calls		✓	✓
Personal Distribution Lists		✓	✓
Personal Greetings		✓	✓
Port Selectable Greetings	✓	✓	
Private Messages			✓
Programmable Dial Actions		✓	
Protected Security Code		✓	✓
Real Time Screen Information		✓	
Relay Paging		✓	✓
Remote Administration	✓	✓	
Reporting		✓	
Ring Duration		✓	
Safe Message Purging	✓	✓	
Scheduled Audiotext		✓	
Scheduled Call Screening			✓
Scheduled Company Greetings		✓	
Scheduled Do Not Disturb			✓
Scheduled Extensions			✓
Scheduled Greetings			✓
Scheduled Message Notification			✓
Scheduled Ring Duration			✓
Screen Saver		✓	
Shared Extensions		✓	✓
Single Digit Menus		✓	✓
Single Digit Message Reply			✓
SMDI/RS-232 Integration	✓		
System Backup	✓	✓	

Table 4-1
Stratagy Features (continued)

STRATAGY FEATURES	SYSTEM	ADMIN	USER
System Distribution Lists		✓	✓
Token Programming	✓	✓	
Toshiba Plug and Play	✓		
Unlimited User IDs	✓	✓	
Universal Ports	✓		
Urgent Messages			✓
Urgent Message Notification		✓	✓
User Option Locks		✓	
Varied Sampling Rates	✓		
Voice Messaging	✓		
Voice Forms		✓	✓

Table 4-1
Stratagy Features (continued)

STRATAGY FEATURES	Stratagy 4	Stratagy 6	Stratagy 24
SYSTEM			
Only DK8 and DK16 Integration	✓		
Disk Redundancy			✓
Fax Messaging			✓
Fax on Demand			✓
Fax Back			✓
Interactive Voice Response (IVR)		✓	✓
ADMINISTRATION			
Keyboard and Monitor			✓
USER			
Fax Message Immediate Retrieve			✓
Fax Message Send and Retrieve			✓

Table 4-2
Stratagy Feature Differences by System

NOTE:
In addition, Stratagy 24 systems support four out of five serial communication port (RS-232) options:

- *Fax Modem 1*
- *Fax Modem 2*
- *Remote Maintenance*
- *IVR Host Connectivity*
- *SMDI Integration*

A maximum of up to 4 of these options may be configured for each Stratagy 24 system.

CHAPTER 5
SYSTEM SPECIFICATIONS

This chapter provides specifications for various aspects of the Stratagy systems. The provided information details the systems' physical and functional characteristics.

STRATAGY 4

CONFIGURATION
- A 486SX computer running at a minimum of 25MHz
- A minimum of 2MB of RAM
- A hard disk drive with DOS
- One 3.5" diskette drive
- Supports only FAX tone detection feature
- Capacity of two or four ports with six hours of message capacity
- Integration with DK8 and DK16 only
- Optional 2400 baud external modem

DIMENSION
Height - 16"
Width - 7"
Depth - 15"

WEIGHT
29 lbs.

POWER REQUIREMENTS
115 VAC at 6 amps (50/60 Hz)
230 VAC at 3.5 amps (50/60 Hz)

HEAT DISSIPATION
Maximum 200 watts
685 BTU per hour

STRATAGY 6

CONFIGURATION
- A 486SX computer running at a minimum of 25MHz
- A minimum of 2MB of RAM
- A hard disk drive with DOS
- One 3.5" diskette drive
- Supports only FAX tone detection features
- Capacity of two, four or six ports with six hours of message capacity

DIMENSION
Height - 16"
Width - 7"
Depth - 15"

WEIGHT
30 lbs.

POWER REQUIREMENTS
115 VAC at 6 amps (50/60 Hz)
230 VAC at 3.5 amps (50/60 Hz)

HEAT DISSIPATION
Maximum 200 watts
685 BTU per hour

STRATAGY 24

CONFIGURATION
- A 486SX computer running at a minimum of 25MHz
- A minimum of 4MB of RAM
- A hard disk drive with DOS
- One 3.5" diskette drive
- Keyboard and monitor
- Optional 2400 baud external Modem
- Full fax capabilities
- Up to 24 ports
- Storage capacity of six, 20 or 33 hours
- Three different disk storage capacities

DIMENSION

	System	Monitor
Height -	6.2"	13.3"
Width -	16.7"	12.8"
Depth -	16.7"	12.6"

WEIGHT
System and keyboard — 38 lbs.
Monitor — 20 lbs.

POWER REQUIREMENTS
115 VAC at 6 amps (50/60 Hz)
230 VAC at 3.5 amps (50/60 Hz)

HEAT DISSIPATION
Maximum 200 watts
685 BTU per hour

MONITOR

POWER REQUIREMENTS
100 - 240 VAC at 0.5A amps (50/60 Hz)

HEAT DISSIPATION
Maximum 50 watts
200 BTU per hour

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INSTALLATION SECTION

Stratagy™ 4 / 6 / 24

INSTALLATION SECTION

CHAPTER 1
INTRODUCTION

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Chapter 1 – Introduction

CHAPTER 1
INTRODUCTION

1 PURPOSE

The Installation section of the *Stratagy Installation and Maintenance Manual* provides detailed step-by-step instructions for installing and maintaining Stratagy voice processing systems.

This chapter provides an overview of the organization of the manual; a list of reference documentation that supports the system; the assumptions about the installer; a list of system mnemonics and terms; and the use of notes, cautions, and warnings.

2 ORGANIZATION

This manual is organized in modular chapters for easy removal and replacement of updated materials. The chapters in this section are as follows:

Chapter 1	Introduction
Chapter 2	Before You Install
Chapter 3	Installing the Hardware
Chapter 4	Accessing Stratagy
Chapter 5	Configuring and Backing Up Stratagy
Appendix A	Checklists and Forms

3 REFERENCE DOCUMENTATION

Reference documentation for the Installation section consists of the remaining sections of the *Installation and Maintenance Manual* and additional Stratagy documentation.

3.1 SECTIONS OF THIS MANUAL

The *Installation and Maintenance Manual* consists of the following sections.

General Description: Reference document that provides an overview of the Stratagy systems. Describes their hardware and features. Available as a stand-alone document.

Installation: Designed for the installer, provides detailed step-by-step instructions for installing and configuring Stratagy systems (this section).

Programming: Provides detailed instructions for operating, customizing, and administrating Stratagy systems.

Fault Finding: Describes the procedures used to diagnose and correct faults.

Maintenance and Upgrades: Provides instructions on maintaining and upgrading Stratagy systems.

Operating Procedures: Consists of the *User Guide* reference document. Describes the telephone operating procedures for the telephone user. Incorporates the *Quick Reference Guide*, a concise guide for Stratagy users.

Technical Bulletins: Provide important updates to the Stratagy documentation.

3.2 ADDITIONAL REFERENCE DOCUMENTATION

In addition, the Stratagy systems are supported by the following complement of reference documentation.

Feature Description: A brief description of the features of the Stratagy systems.

User Guide: Describes the telephone operating procedures for the telephone user.

Quick Reference Guide: A concise guide for Stratagy users.

4 ASSUMPTIONS ABOUT THE INSTALLER

4.1 KNOWS STRATAGY AND THE TELEPHONE SYSTEM

To install, upgrade, or maintain the system, you need to know the following about Stratagy:

- Features (refer to the *Stratagy General Description*)
- Operation, customization, and administration (refer to the Programming section)

In addition, you need to know about the telephone system to which you will connect Stratagy. Refer to the appropriate installation documentation.

4.2 TRAINED INSTALLER FAMILIAR WITH PCs

This manual is designed for a trained installer with some familiarity of PCs and an understanding of telephone systems. We assume you know the following:

- Computer terms, such as: I/O, serial port, parallel port, RS-232, RAM, and DOS.
- How to ***safely*** open a personal computer and install/remove cards.

- How to identify basic components of a personal computer: 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 computer.
- How to type the underscore character (_).
- When to press the Enter key.
- Telephony terms, such as: station side, CO, single-line, hunt group, coverage path, flash-hook, call forward on ring-no-answer, call forward busy, DTMF, and tone patterns.
- The difference between an RJ-11 and RJ-14 connector.
- The separation of the telephone switch and Stratagy.
- How to use a line monitor (and have a line monitor) to observe test calls.

If you are unfamiliar with any of the above, please find out ***before*** you attempt to install Stratagy. Toshiba Technical Support will be happy to answer your questions regarding the above.

5 SYSTEM MNEMONICS/TERMS

The following mnemonics identify the system's hardware, operation, and features.

BPS: Bits Per Second – Unit of measure that refers to the transmission speed (baud rate) of electronic signals. Used when describing modem operation.

CO: Central Office – Facility which houses switching equipment that provides telephone service (CO lines, Centrex lines, etc.) for the immediate geographical area.

DID: Direct Inward Dialing – Feature of PBX and Centrex telephone systems which allows callers to dial from the public network to a wanted extension without operator intervention.

DK: Digital Key.

DTMF: Dual tone Multi-frequency – Push-button tone dialing.

I/O: Input/Output.

IVR: Interactive Voice Response – An application that will prompt the user for input (using a custom prompt), wait for the user to enter a DTMF response, which will be stored into a variable, and then use that information to access a database to formulate a response. Databases may be on the hard disk of the Stratagy system, accessed remotely over a network, or accessed through the serial ports of the Stratagy system, possibly connecting to a mainframe or other data server.

Once a response has been determined from the database, the Stratagy system may be programmed to play this data back to the caller in a number of different ways: as a date, time, monetary value (in dollars and cents), or simply as a number. The value may be combined with other custom-recorded prompts, so that the system could, for example, respond to a caller with the message "Your order for 6 items will be shipped on July 17, 1994." The number six and the date in this example would be provided by the database, while the phrases "Your order for" and "items will be shipped on" would be recordings that the System Administrator would make.

MODEM: Modulator-Demodulator – Device used primarily for converting digital signals into quasi-analog signals for transmission, and reconverting upon reception.

PBX: Private Branch Exchange – Industry-standard term which refers to a telephone switch, usually on-premises, which serves an individual company, and is connected to a public telephone exchange through the CO.

PC: Personal Computer.

PCB: Printed Circuit Board.

PORT: There are two types of ports: physical and logical. A physical port is an actual station circuit location; a logical port is the set of characteristics – features, station intercom number, etc. – assigned to the physical port. Logical ports are mobile; they can be moved from one physical port to another.

RAM: Random Access Memory – Type of system memory that holds individual system configuration and features programming. RAM is read/write memory, and can easily be revised in programming.

RNA: Ring No Answer.

ROM: Read Only Memory – Type of system memory that holds static software that comprises the mechanics of the features' functions.

SMDI: Simplified Message Desk Interface – type of integration that uses an RS-232 serial link.

SMDR: Station Message Detail Recording.

USER ID: Unique Stratagy record that provides call processing control – records messages from callers, provides information to callers, or controls the flow of a call.

6 USE OF NOTES, CAUTIONS, AND WARNINGS

Notes – Elaborate specific items, or reference other information.

Important Notes – Call attention to important instructions or other information.

Cautions – Advise you that the equipment could be damaged if the instructions are not followed closely.

Warnings – Alert you when the given tasks could cause the technician personal injury or death.

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INSTALLATION SECTION

CHAPTER 2
BEFORE YOU INSTALL

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Chapter 2 — Before You Install

CHAPTER 2
BEFORE YOU INSTALL

1 INTRODUCTION

The pre-installation requirements include:

- Knowing the reference documentation.
- Conducting a pre-installation survey to determine how to configure and customize the Stratagy system.
- Determining Stratagy's configuration and integration.
- Customizing User ID mailboxes to define the automated attendant and voice messaging system.
- Selecting and preparing the hardware site.

To assist you in tracking your progress in meeting these requirements, we provide the Stratagy Pre-Installation. (We also provide the Stratagy Installation Checklist to help you verify that you have completed the necessary steps involved in installation.) See Appendix A, "Checklists and Forms."

2 THE REFERENCE DOCUMENTATION

To install, upgrade, or maintain the system, you need to know the following about Stratagy.

- Features (refer to the *Stratagy General Description*)
- Installation (refer the Installation section).
- Operation, customization, and administration (refer to the Programming section).

In addition, you need to know about the telephone system to which you will connect Stratagy. Refer to the appropriate installation documentation.

3 CONDUCT A PRE-INSTALLATION SURVEY

When conducting a pre-installation survey, obtain information about the company, its telephone system, and the desired auto attendant and voice mail functions. As appropriate, use the items suggested below and include additional questions.

- The company
  - Number of employees
  - Number of employees using mailboxes
  - Number of locations
- Telephone system to which you will connect Stratagy
  - Manufacturer, model, and software release
  - Number of Central Office lines
  - Number of single line stations
- Auto attendant information
  - Number of companies using system
  - Whether primary answering position
  - Company greetings and instructions
  - Menus (sales, service, etc.)
- Voice mail information
  - Number of employees requiring voice mailboxes
  - Message waiting lights
  - Notification requirements
  - Directory requirements

4 DETERMINE STRATAGY'S CONFIGURATION AND INTEGRATION

Determining Stratagy's configuration and integration definitions involves the following. Reference Chapter 5 ("Configuring and Backing Up Stratagy") for details.

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

  Note that each Stratagy system has been pre-installed at the factory for out-of-box (Plug and Play) operation on a specific Toshiba telephone system as follows:

  Stratagy 4 with Strata DK8
  Stratagy 6 with Strata DK16
  Stratagy 24 with Strata DK280A

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

IMPORTANT NOTE:

The above Strata DK 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 will automatically define 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.

5 CUSTOMIZE USER ID MAILBOXES

Customize Stratagy by programming the User IDs to define the automated attendant and voice messaging system. For details, see the Programming section.

Note that 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 and Forms") provides the following: Users Form, Auto (Scheduling) Form, Notify Form, and Greeting Scripts Form.

6 SELECT AND PREPARE THE HARDWARE SITE

Since the Stratagy system PC hardware and the telephone system must be physically connected, locate the PC by the telephone system. A remote system can be located anywhere it is appropriate to place a PC.

Power Requirements – We recommend the following for the Stratagy system PC desktop and tower:

- A 15 A circuit breaker and dedicated AC circuit (does not have an ON/OFF wall switch to avoid accidental power turn-off)
- A surge protector with a light that indicates whether or not the protector is operational

Environmental Considerations – Any place appropriate for a PC, including:

- Dry and clean, well ventilated, well illuminated, and easily accessible
- *Not* subject to extreme hot or cold; corrosive fumes, dust, or other airborne contaminants; or excessive vibration

For more details about environmental and electrical specifications, see Chapter 3, "Installing the Hardware."

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INSTALLATION SECTION

CHAPTER 3
INSTALLING THE HARDWARE

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Chapter 3 — Installing the Hardware

FIGURE LIST

TABLE LIST

CHAPTER 3
INSTALLING THE HARDWARE

1 INTRODUCTION

This chapter describes the Stratagy hardware and provides step-by-step instructions on installing the Stratagy 4, 6, and 24 systems.

2 THE HARDWARE

Stratagy 4 and 6 – This system consists of a PC tower. It contains 2 or 4 ports, and 6 hours of disk storage. It may be expanded to a maximum of 6 ports. A laptop PC with Stratagy Remote software installed and a null modem cable is required. An external modem is available as an option. See Figure 3-1 for the major hardware components. For the specification summary, see Table 3-1.

Stratagy 24 – This system consists of a desktop PC, monitor, and keyboard. It contains 4 ports, and either 6, 20, or 33 hours of disk storage. It may be expanded to a maximum of 24 ports. An external modem is available as an option. See Figure 3-2 for the major hardware components. For the specification summary, see Table 3-2.

For the Stratagy hardware environmental and electrical summary for Stratagy 4, 6, and 24, see Table 3-3.

3 WHAT COMES SHIPPED

Stratagy 4 and 6 ships with the following:

- PC tower appropriately equipped and all necessary software pre-installed on the hard disk
- Documentation package (DOC PAK)

Stratagy 24 ships with the following:

- PC desktop appropriately equipped and all necessary software pre-installed on the hard disk
- Monitor and keyboard
- Documentation package (DOC PAK)

4 INSPECTING AND UNPACKING THE SYSTEM

Use the following procedures when inspecting and unpacking the system:

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 system against the packing list and inspect all equipment for damage. If equipment is missing or damaged, contact your supplier immediately.
3. Retain the original packaging materials for re-use when transporting system hardware.
4. Place the key for the PC's lock in a safe place. You may want to use the keys to prevent unauthorized keyboard access to Stratagy.

5 INSTALLING STRATAGY VOICE BOARDS

Stratagy systems can be expanded to their maximum capacity by installing additional Stratagy 2- or 4-port voice boards. This section discusses:

- Stratagy voice board code and *activation key_number*
- Addressing and installing Stratagy voice boards

5.1 STRATAGY VOICE BOARD CODE AND ACTIVATION KEY_NUMBER

Only Stratagy voice boards can be used in a Stratagy system. In addition, each Stratagy system has a unique *activation key_number* that matches the Stratagy software to a specific Stratagy voice board.

IMPORTANT NOTE:
Use only Stratagy voice boards supplied by Toshiba in your Stratagy system. Non-Stratagy voice boards will cause your entire system to be non-operational.

Stratagy voice boards are manufactured by Rhetorex, Inc. and are configured with a unique Stratagy code allowing them to work with a Stratagy system. You must install and use only Stratagy voice boards supplied by Toshiba. Other Rhetorex voice boards manufactured for other voice processing systems are not configured with the unique Stratagy code. Therefore, a non-Stratagy voice board installed in a Stratagy system will cause the entire system to become non-operational. All non-Stratagy voice boards must be removed to allow the Stratagy system to function. In a Stratagy 24 system, the non-Stratagy voice boards will be identified on the monitor. Non-Stratagy voice boards will also be identified in the Stratagy 4 and 6 systems when these systems are accessed using a laptop PC with Stratagy Remote software via local or remote access.

IMPORTANT NOTE:
Each Stratagy voice processing system has a unique* activation key_number *entered during manufacturing that matches the Stratagy software to a Stratagy voice board. The software will not work with any other voice board.

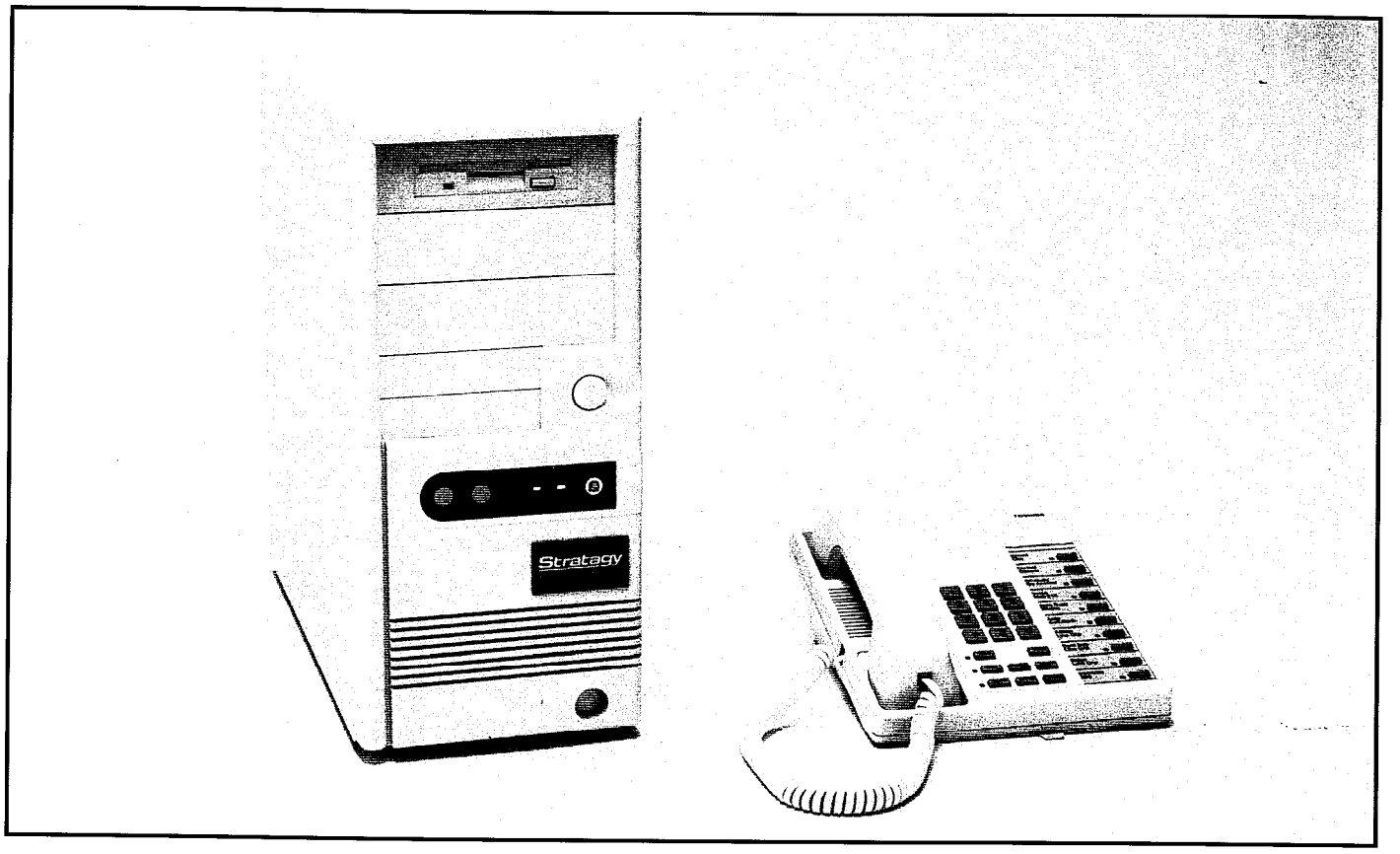

Figure 3-1
Stratagy 4 and 6 Hardware Components

Tower Hardware	
CPU	486SX CPU @ 25 MHz
Hard Disk Drive	6 hours net storage
Floppy Drive	3.5" diskette drive (1.44MB)
RAM	2MB
Other Hardware	
External Modem	2400 baud modem (optionally equipped, but required for remote access)
Capacities	
Ports	2, 4 or 6 ports
Software	DOS Stratagy voice processing software, host, and necessary utilities

Table 3-1
Stratagy 4 and 6 Hardware Specification Summary

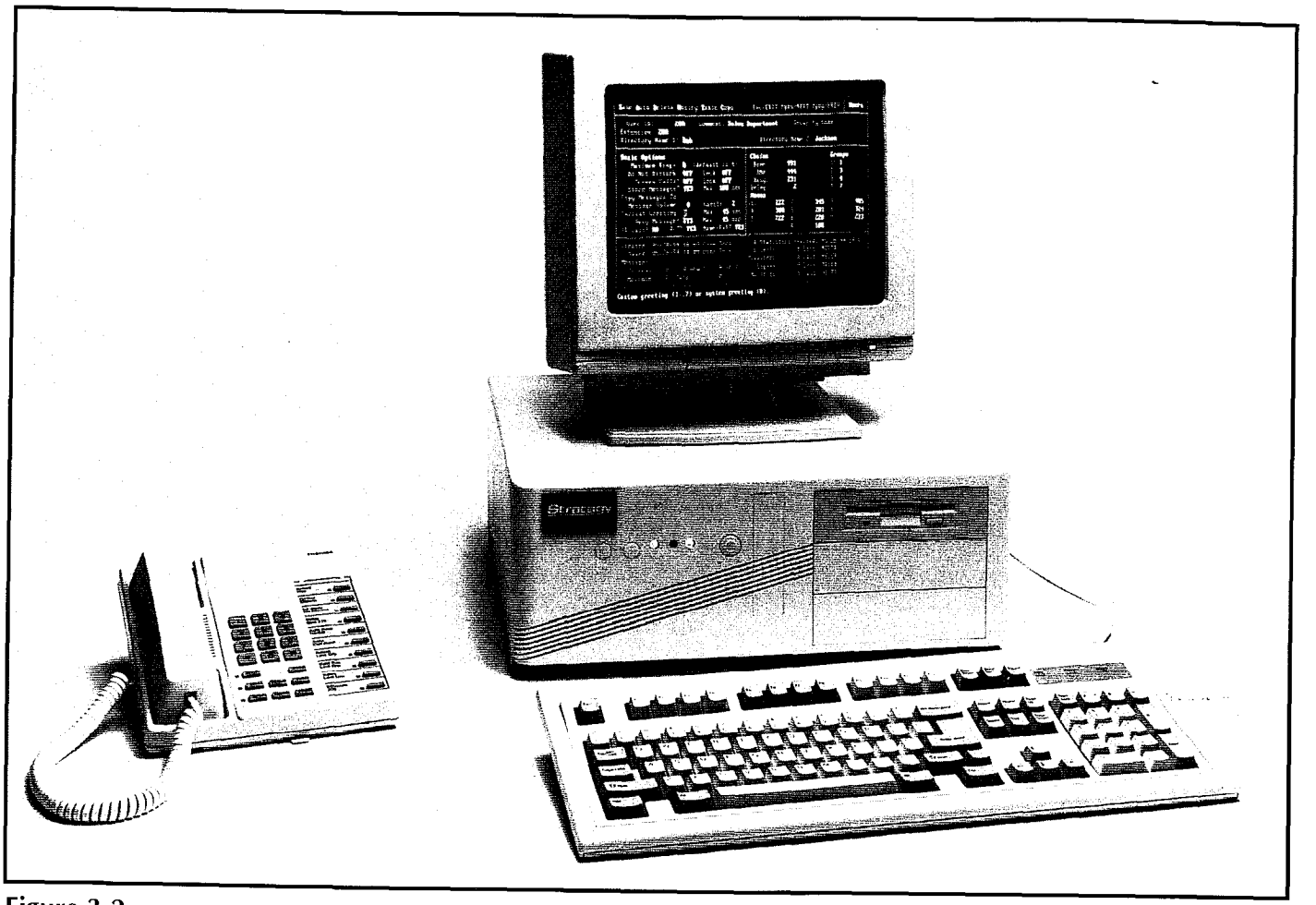

Figure 3-2
Stratagy 24 Hardware Components

Desktop Hardware	
CPU	486SX CPU @ 25 MHz
Hard Disk Drive	6, 20, or 33 hours of net storage
Floppy Drive	3.5" diskette drive (1.44MB)
RAM	4MB
Other Hardware	
Monitor	VGA
Keyboard	101-key keyboard
External Modem	2400 baud modem (optionally equipped, but required for remote access)
Capacities	
Ports	4, 6, ... 24 ports
Software	DOS Stratagy voice processing software, host, and necessary utilities

Table 3-2
Stratagy 24 Hardware Specification Summary

Environmental Conditions	Operating Temperature	39.2°F to 104°F (4°C to 40°C)
	Storage Temperature	104°F to 140°F (–40°C to 60°C)
	Operating Humidity	20% to 80% (non-condensing)
Electrical Requirements (AC Input)	Stratagy 4, 6 or 24	115 VAC, at 6 amps (50/60 Hz) 230 VAC at 3.5 amps (50/60 Hz)
	Monitor	115 or 230 VAC at 0.5 amps (50/60 Hz)
	(Provide host system with 15 A circuit breaker and dedicated circuit)	
Heat Dissipation	Stratagy 4, 6, or 24	Maximum 200 watts, 685 BTU per hour
	Monitor	Maximum 50 watts, 200 BTU per hour
Analog Interface	Telco types	Loop Start, OPX
	Connection	Single line, RJ-14C jacks
	Impedance	600 ohm nominal
	Frequency response	300 ~ 3200 Hz
	Ring detect	40 ~ 130 Vrms, 15.3 ~ 68.0 Hz
	Loop current range	20 ~ 120 mA polarity insensitive
	Transfer signaling	Hook-flash
	Input level	–3 dB maximum, 130 dB/minimum
	Output level	–3 dB maximum, 30 dB/minimum
	DTMF receive	16 tones (0 ~ 9, *, #, A ~ D)
	Minimum tone duration	45 ms
	Minimum tone detect	–29 dB/minimum
	Twist range	±10 dB
	DTMF transmit	16 tones (0 ~ 9, *, #, A ~ D)
	Minimum tone duration	50 ms
	Transmit level	–7 dBm nominal
	Twist range	2 ~ 3 dB
	Progress Tones	Standard and proprietary, in 350 ~ 640 Hz frequency range
	Frequency response	200 ~ 300 Hz ±3 dB/minimum
	Speech Parameters	–13 dB/minimum average transmit level for a –32 dBm receive level
	Voice Coding Scheme	64 Kbs u-Law PCM, 32 Kbs ADPCM compression

Table 3-3
Stratagy Hardware Environmental and Electrical Specification Summary

Each Stratagy voice processing system has a unique *activation key_number* that matches the Stratagy software to a Stratagy voice board. This number is entered into the system during manufacturing.

The activation key_number is written on a piece of paper shipped with the Stratagy system. Store the number in a safe place.

The *activation key_number* must be entered to allow the Stratagy system to operate under the following conditions:

- The Stratagy factory-installed voice board is removed.
- The Stratagy hard disk drive is replaced or upgraded.
- The Stratagy system software is re-installed or upgraded.
- Fault isolating or troubleshooting a Stratagy system under direction of Toshiba Technical Support.

In most cases, you must re-enter the original *activation key_number* shipped with the system. In other cases, you must obtain a new *activation key_number* by contacting Toshiba.

5.2 ADDRESSING AND INSTALLING STRATAGY VOICE BOARDS

Stratagy systems may be expanded to their maximum capacity by installing additional Stratagy 2- or 4-port voice boards. Installing a voice board into a Stratagy system PC involves addressing the board before installing it.

5.2.1 ADDRESSING THE VOICE BOARD

In order for Stratagy to recognize each voice board in a system, each voice board is assigned a unique address. The address of the first voice board is 300; the second, address 301; the third, address 302, etc.

To set a voice board's address, you need to arrange the 10 jumper pins on the voice board in the correct manner. The jumper pins are located along the top middle-right of the board as you are looking at the component side of the board with the 4-wire jacks on the right. See Figure 3-3.

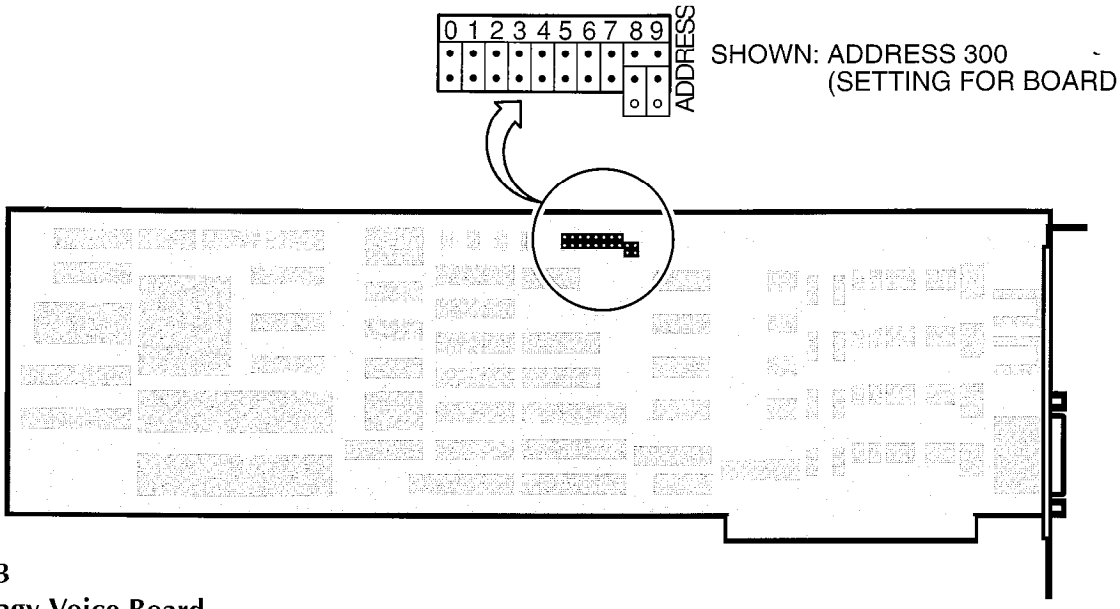

Figure 3-3
The Stratagy Voice Board

Voice board 1 is factory installed and normally shipped with address 300 (setting for board 1). Additional boards are packaged separately. Set the jumper pins for each voice board as follows. Note the following:

0: both pins are *not* covered/connected by a black jumper pin (open)

1: both pins are covered/connected by a black jumper pin (closed)

Board 1	Address 300	1111111100
Board 2	Address 301	0111111100
Board 3	Address 302	1011111100
Board 4	Address 303	0011111100
Board 5	Address 304	1101111100
Board 6	Address 305	0101111100

5.2.2 INSTALLING THE VOICE BOARD

To install the voice board in the Stratagy system, do the following. See Figures 3-4 and 3-5 for the voice board slots in the Stratagy 4 and 6 and Stratagy 24, respectively.

1. If installing voice boards in an existing system, from the Stratagy Main Menu shut down Stratagy (see Chapter 4, "Accessing Stratagy" for details).
2. Turn computer's power off.
3. Unplug the power cord.
4. Open the computer and locate the first available full length slot.
5. Remove the back slot cover and install the voice board while taking care to properly slide the end of the voice board into the rear card guide. Repeat this for each voice board you are installing.
6. Close the computer, plug in the power cord, and turn on the power. Stratagy should automatically recognize the additional ports.

IMPORTANT NOTE:
Use only Stratagy voice boards supplied by Toshiba. Non-Stratagy voice boards will cause your entire system to be non-operational.

6 SETTING UP STRATAGY SYSTEM HARDWARE

6.1 SETTING UP THE STRATAGY 4 AND 6

To set up Stratagy 4 and 6, do the following. For a diagram of the front and back panels, see Figure 3-6.

1. Place the PC tower in the site determined by the pre-installation survey.
2. Make sure the selectable power switch is at 110V or 220V, depending upon available input power.
3. Connect the PC power cable.
   - If using 110V AC, connect the PC power cable to the rear of the PC and to the dedicated 110V AC outlet. (We recommend you use a surge protector.)
   - If using 220V AC, connect the PC power cable to the rear of the PC and to the dedicated 220V AC outlet. (We recommend you use a surge protector.)

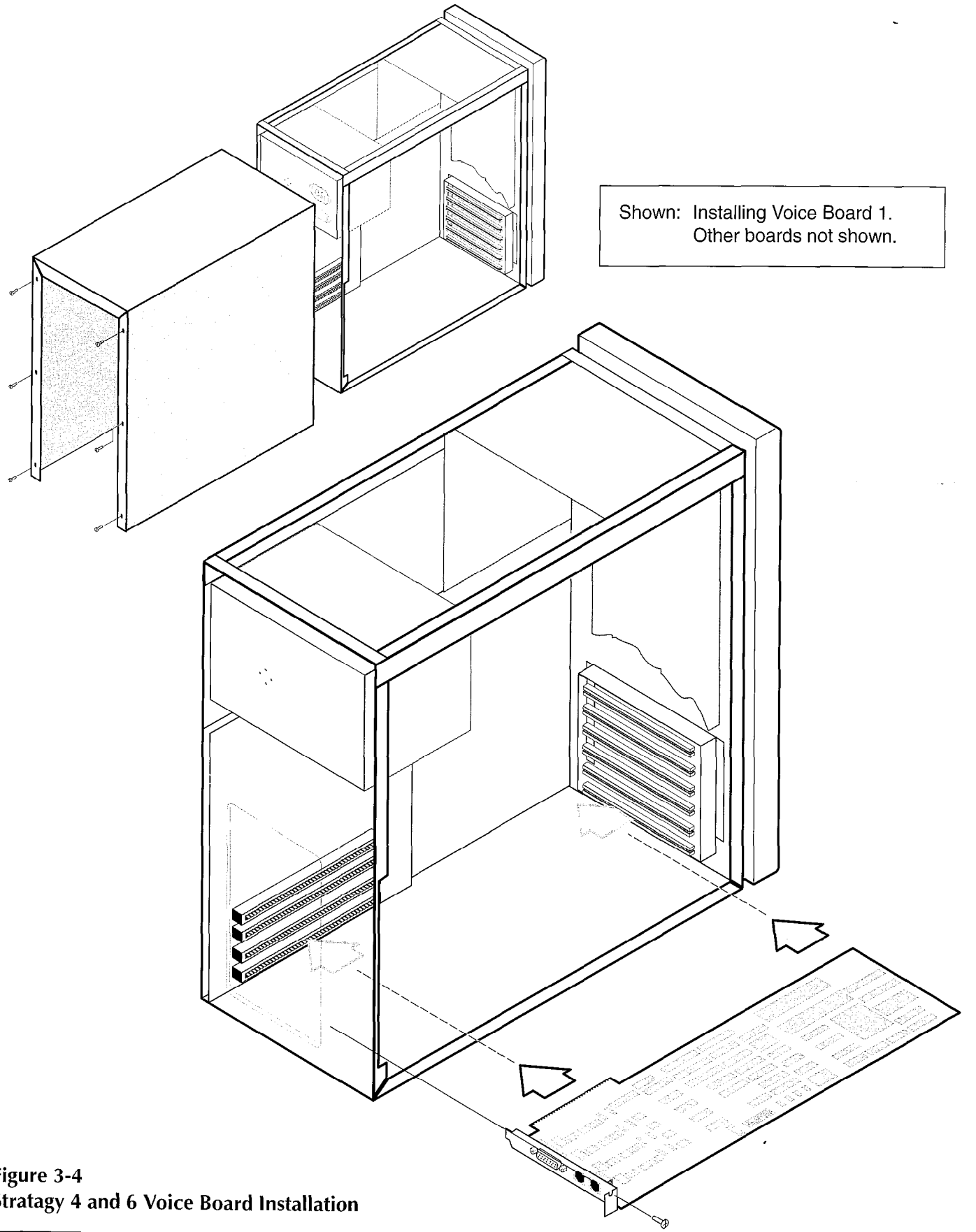

Figure 3-4
Stratagy 4 and 6 Voice Board Installation

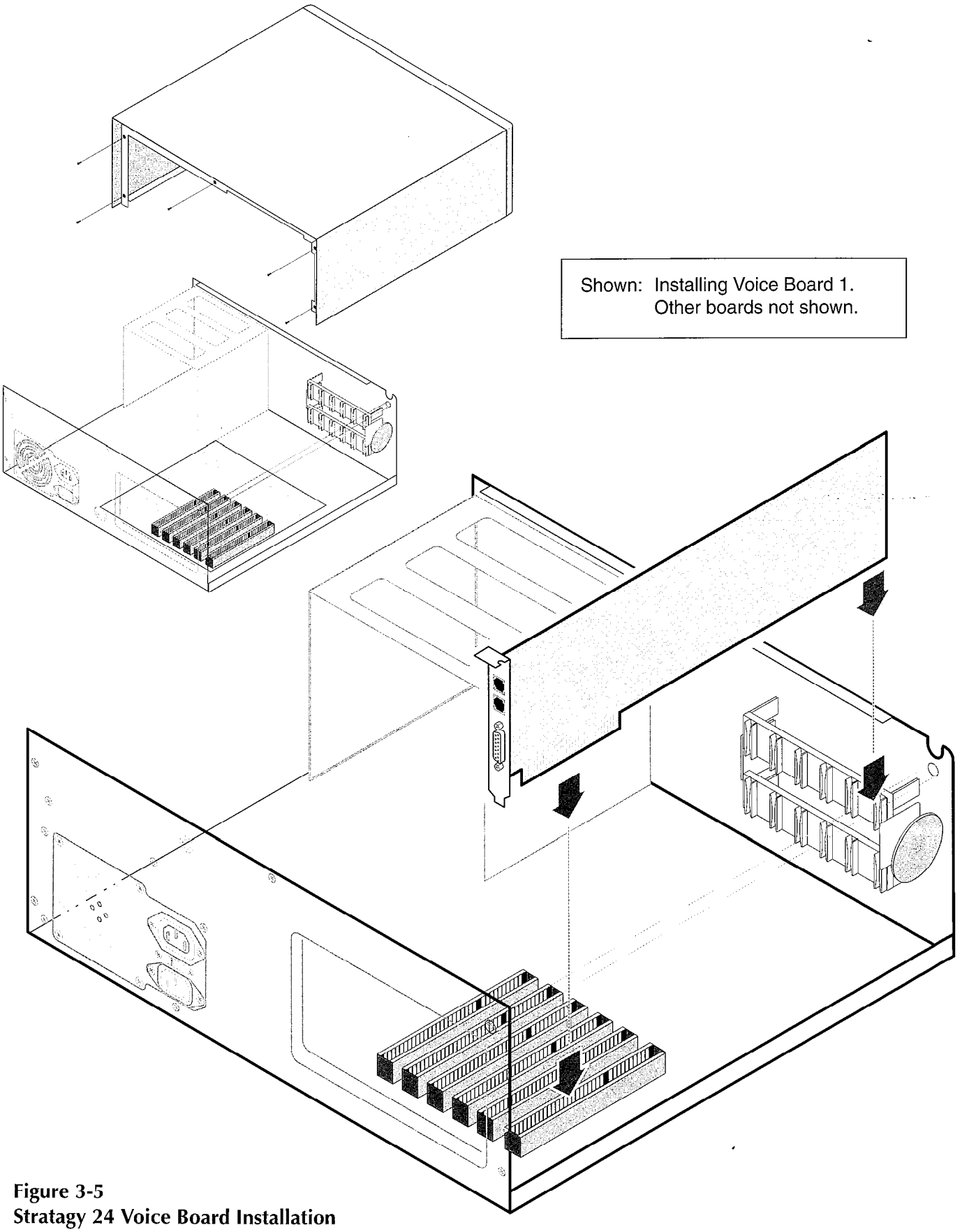

Figure 3-5
Stratagy 24 Voice Board Installation

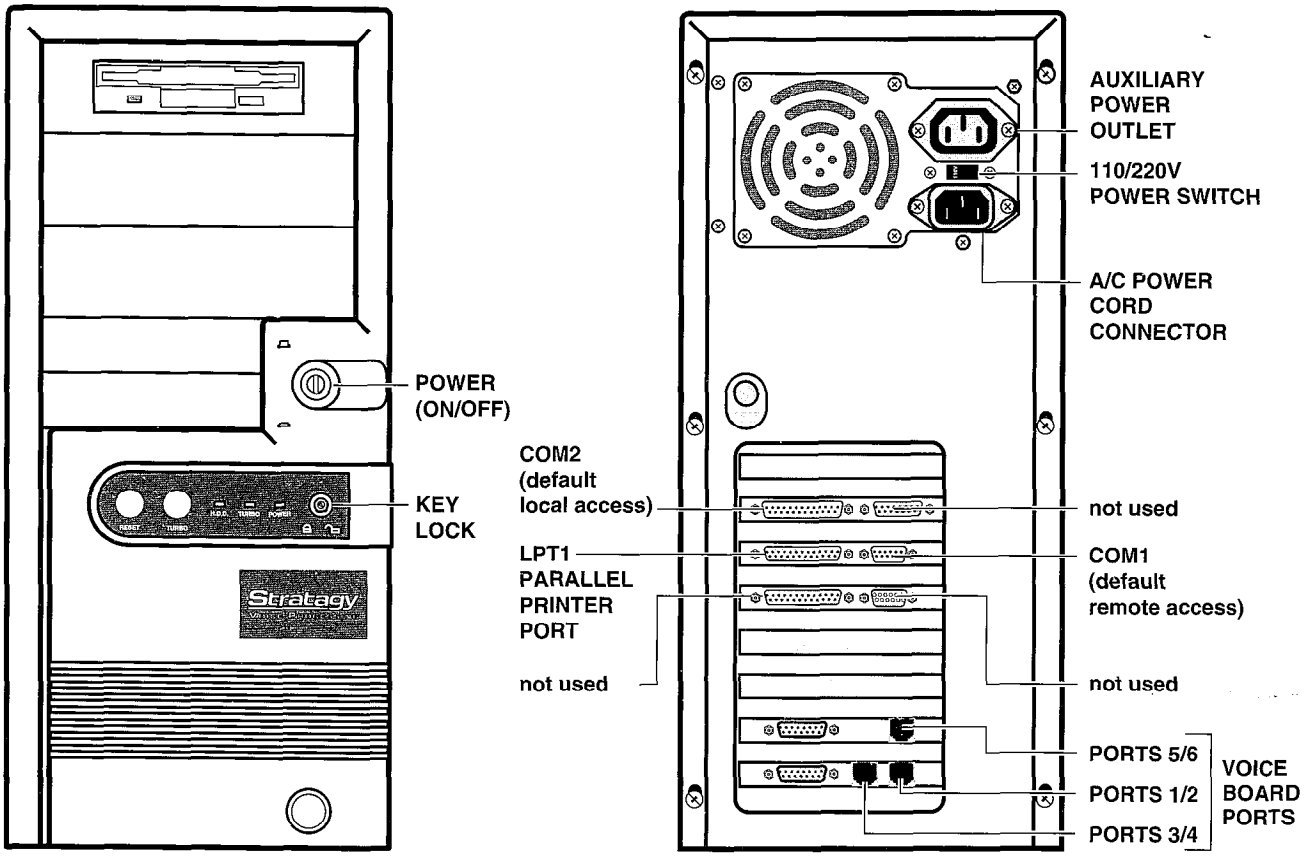

Figure 3-6
Stratagy 4 and 6 Front and Back Panels (Sample Stratagy 6 with 6 Voice Board and 2 COM Ports)

6.2 SETTING UP THE STRATAGY 24

To set up Stratagy 24, do the following. For a diagram of the front and back panels, see Figure 3-7.

1. Place the Stratagy system PC on a table or desk in the site determined by the pre-installation survey.
2. Place the keyboard in front of the PC desktop.
3. Connect the round keyboard connector to the matching connector located in a round hole in the rear panel.
4. Place the monitor on top of the Stratagy system PC.
5. Connect the 15-pin monitor data cable to the video/printer adapter card's 15-pin connector located on the rear panel. Tighten the screws with a small flathead screwdriver.
6. Connect the PC power cable.
   - If using 110V AC, connect the PC power cable to the rear of the PC and to the dedicated 110V AC outlet. (We recommend you use a surge protector.)
   - If using 220V AC, connect the PC power cable to the rear of the PC and to the dedicated 220V AC outlet. (We recommend you use a surge protector.)
7. If installing a printer, connect the 25-pin data cable from the printer to the RS-232 printer port (LPT1) on the back of the Stratagy system. Tighten the screws. The printer must have a parallel interface.

7 PHYSICALLY CONNECTING STRATAGY TO YOUR TELEPHONE SYSTEM

IMPORTANT NOTE:
Before connecting Stratagy to your telephone system, configure the voice mail system settings for your telephone system individually. Refer to your telephone system's installation documentation.

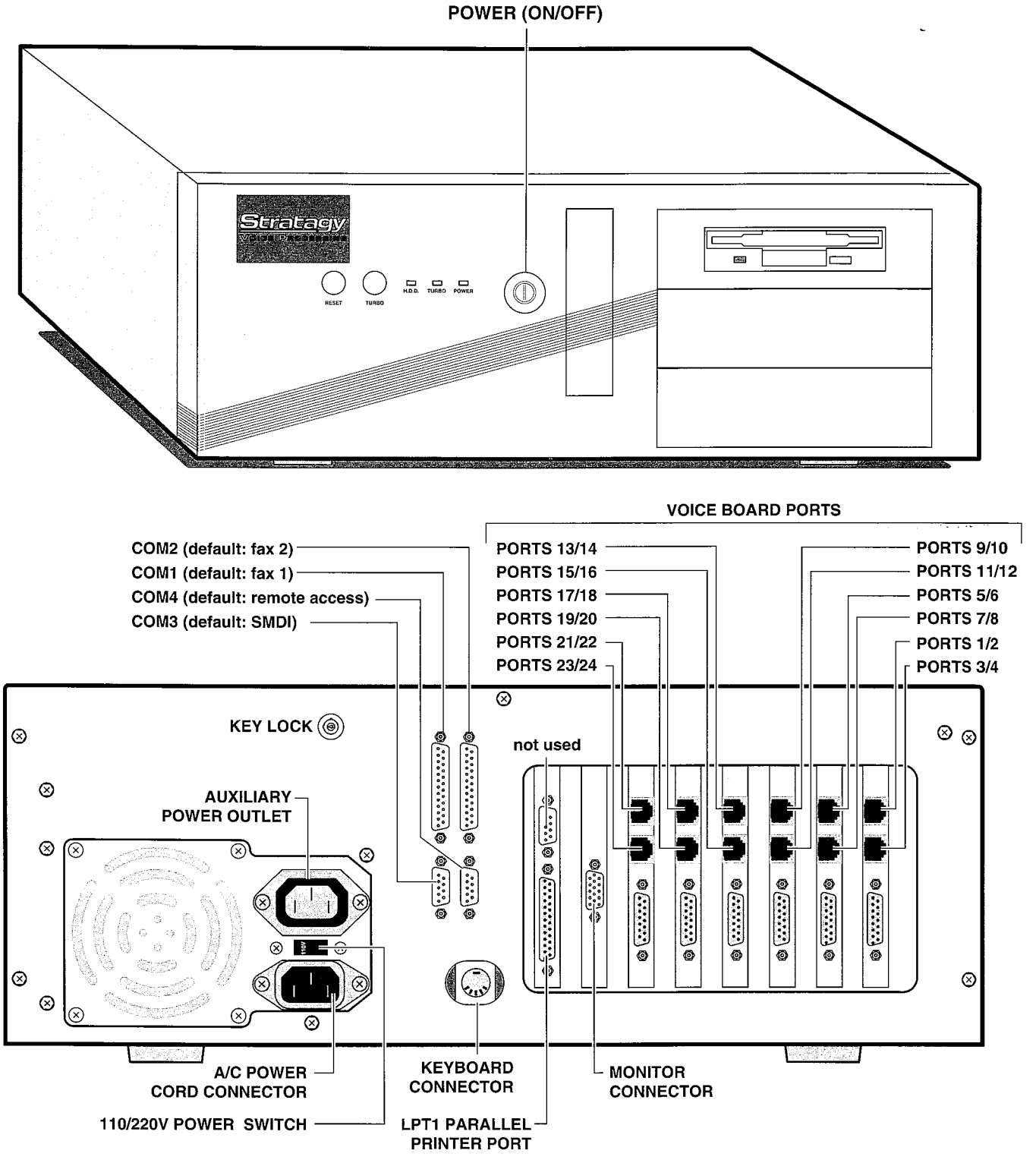

Figure 3-7
Stratagy 24 Front and Back Panels (Sample Stratagy 24 with 24 Voice Board Ports)

Physically connect Stratagy to your telephone system. To do this you need to know:

- **Customer-Supplied Parts** – All modular cords, connectors, cables, and connection blocks are customer-supplied.
- **Location of the Ports on the Voice Board** – On a voice board with two connectors, the top connector represents the first two ports, and the bottom connector represents the second two ports, for a total of four ports. See Figure 3-8.
- **Numbering of Ports** – Ports are numbered from 1 up to a maximum of 24 (depending upon your system hardware), with port 1 starting with the lowest addressed voice board. See Figures 3-6 and 3-7.
- **RJ-14 Modular Jacks and Voice Board Ports** – Each connector on a voice board is an RJ-14 type module jack that supports two ports, where the inner pair of wires is one port and the outer pair is the other port.
- **RJ-14 versus RJ-11 Modular Jacks** – RJ-14 modular jacks use a standard 2-pair line cord, which represents two analog, or single-line, extensions. RJ-11 jacks use only the inner pair of wires, which represents only one analog extension.
- Stratagy may connect to the telephone system in three ways.
  - Directly using RJ-14 modular cords. See "Connecting to a Telephone System that Uses RJ-14 Jacks."
  - Directly using RJ-14/RJ-11 split modular cords. See "Connecting to a Telephone System that Uses RJ-11 Jacks."
  - Indirectly using RJ-14 modular cords, 625-type modular blocks, a 66M150 type split block, and 25-pair cable with AMP connector. This is typical of Toshiba Strata DK and Perception telephone systems. See "Connecting to a Telephone System that Uses Modular and Split Block."

7.1 CONNECTING TO A TELEPHONE SYSTEM THAT USES RJ-14 JACKS

If your telephone system uses RJ-14 modular jacks, use a standard 2-pair line to connect Stratagy to the phone system. See Figure 3-9.

Connect the system as follows:

1. Plug one end of an RJ-14 connector into Stratagy's voice board jack for ports 1 and 2; the other end into the telephone system's jack for the first two lines.

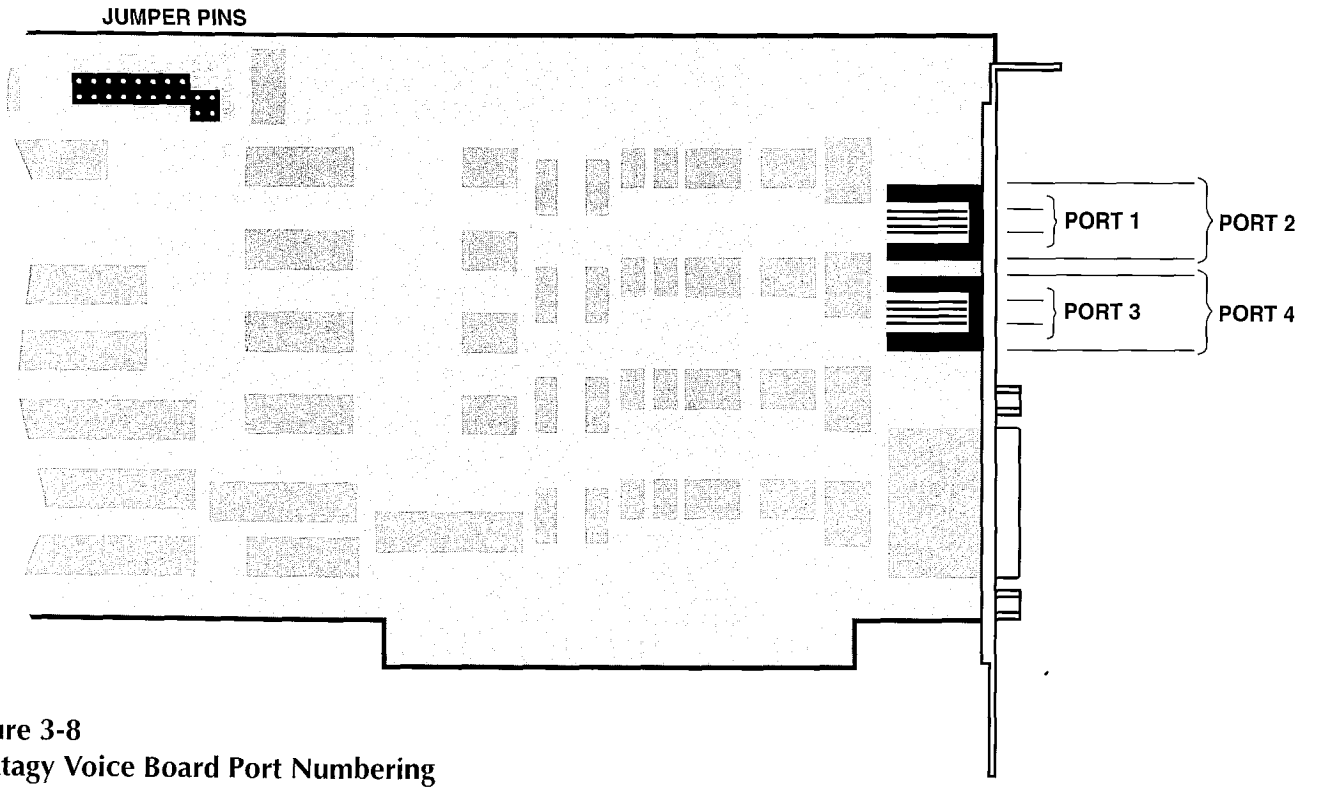

Figure 3-8
Stratagy Voice Board Port Numbering

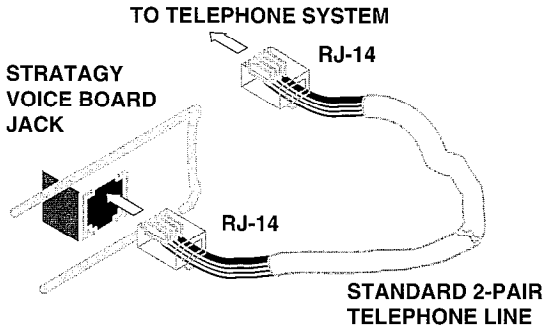

Figure 3-9
Connecting Stratagy to a Telephone System that Uses RJ-14 Jacks

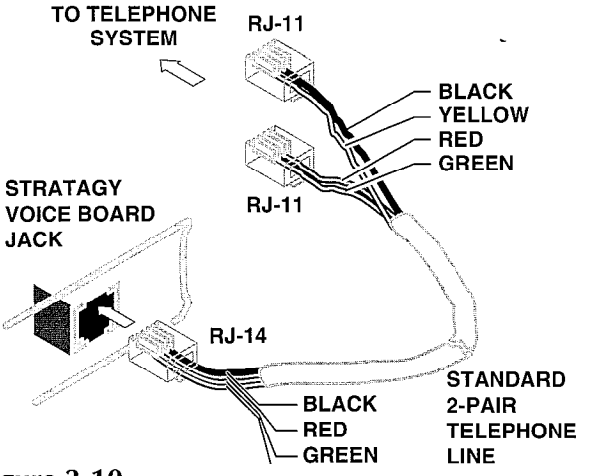

Figure 3-10
Connecting Stratagy to a Telephone System that Uses RJ-11 Jacks

2. Plug one end of an RJ-14 connector into Stratagy's voice board jack for ports 3 and 4; the other end into the telephone system's jack for the second two lines.
3. Continue the process until all voice board ports are connected.

7.2 CONNECTING TO A TELEPHONE SYSTEM THAT USES RJ-11 JACKS

If your telephone system uses RJ-11 modular jacks, you will need to use a splitter to connect Stratagy's RJ-14 jacks to the phone system. That is because for RJ-11 connectors only two wires – the inner pair – are used. (Also see "Connecting to a Telephone System that Uses Modular and Split Block.") See Figure 3-10.

Connect the systems as follows:

1. Make splitters by dividing one end of each RJ-14 connector into two RJ-11 connectors.
   - Attach the green and red wires (the inner pair of the RJ-14 connector) to the inner pair of one RJ-11 plug. Refer to this as the first RJ-11 plug.
   - Attach the black and yellow wires (the outer pair of the RJ-14 connector) to the inner pair of the other RJ-11 plug. Refer to this as the second RJ-11 plug.
2. Connect Stratagy's voice board ports 1 and 2 to the first two lines on the telephone system by inserting the following:
   - the RJ-14 plug into the jack for Stratagy's voice board ports 1 and 2
   - first RJ-11 plug into the telephone system's jack for the first line
   - second RJ-11 plug into the telephone system's jack for the second line
3. Continue the process until all voice board ports are connected.

7.3 CONNECTING TO A TELEPHONE SYSTEM THAT USES MODULAR AND SPLIT BLOCK

Many telephone systems will require other types of connections instead of directly to RJ-14 or RJ-11. This type of connection is accomplished using 625-type modular blocks and telephone wire, and/or 66M150 split blocks.

Connect the systems as follows:

1. Plug one end of an RJ-14 connector into Stratagy's voice board jack for ports 1 and 2; the other end into a 625-type or equivalent modular block. Connect the wire to the telephone system using the appropriate connector. A 66M150 split block may also be used with bridging clips and as shown in Figure 3-11. This is typical of Toshiba Strata DK and Perception telephone systems.
2. Plug one end of an RJ-14 connector into Stratagy's voice board jack for ports 3 and 4; the other end into a 625-type or equivalent modular block. Connect the wire to the telephone system using the appropriate connector. A 66M150 split block may also be used with bridging clips and as shown in Figure 3-11.
3. Continue the process until all voice board ports are connected.

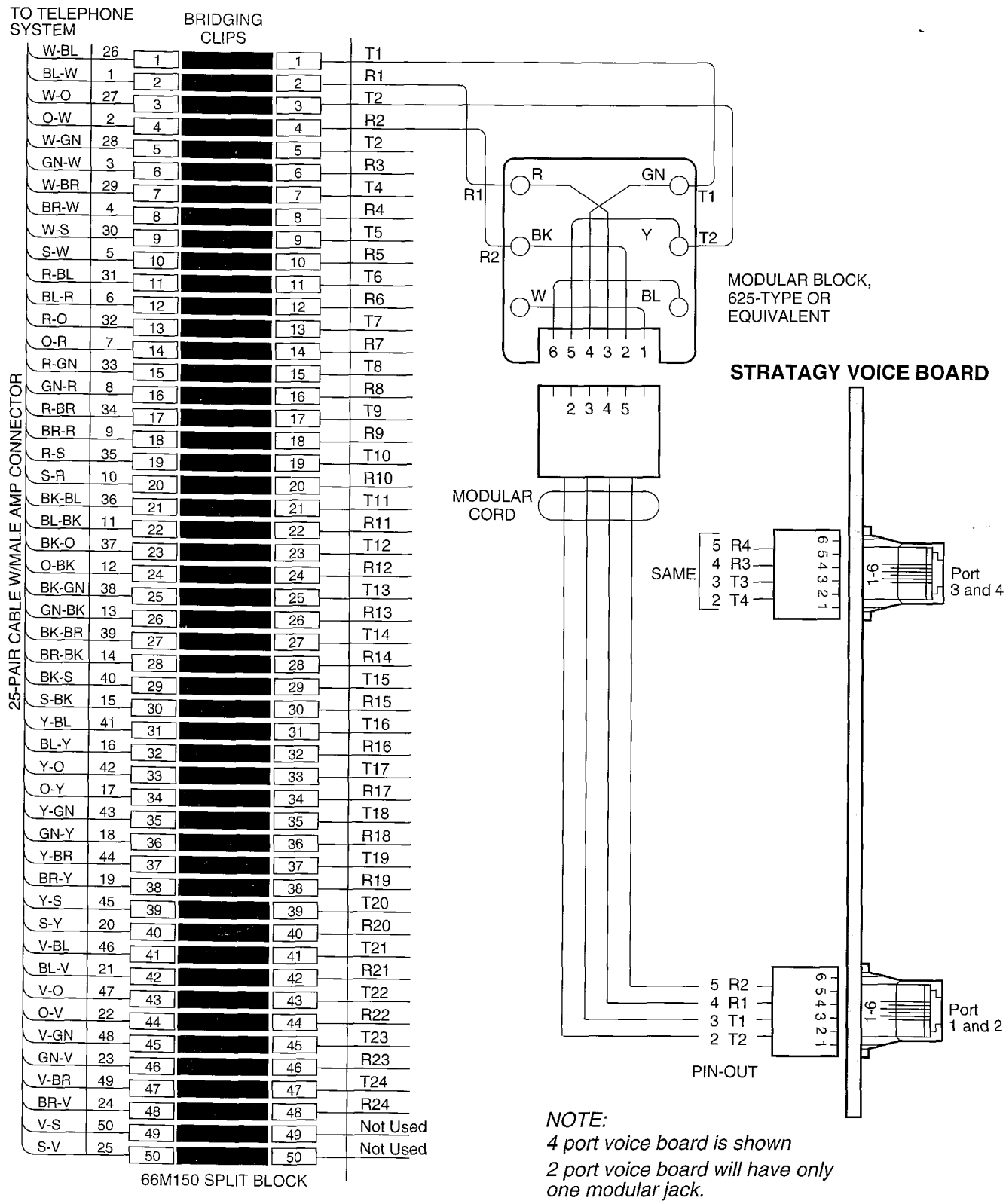

Figure 3-11
Connecting Stratagy to a Phone System That Uses Modular and Split Block

8 VERIFY BASIC FUNCTIONS

Follow the instructions below to verify that the basic functions of Stratagy are working once you have connected the system or have moved Stratagy to a different site.

Note that each Stratagy system has been pre-installed at the factory for out-of-box (plug and play) operation on a specific Toshiba telephone system. This includes the integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions. The systems are:

Stratagy 4 with Strata DK8
Stratagy 6 with Strata DK16
Stratagy 24 with Strata DK280A

This is the out-of-box Toshiba Plug and Play operation for all Stratagy systems. Therefore, whether or not you have the specific telephone system associated with your Stratagy 4, 6, or 24, you will be able to verify basic functions.

IMPORTANT NOTE:
If you experience any problems, go to the Fault Finding section before proceeding.

1. Verify that Stratagy is functioning and the boards did not get dislodged during shipping. To do this, power up the system. Let it proceed without any action from you. Wait approximately 3 minutes. A Stratagy 24 will display the Main Menu.
2. Verify that each port works. This process also verifies voice playback and basic auto-attendant functions. Dial the extension number for each port. For each port Stratagy should:
   - 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 instructions greeting ("To reach the person..."), greeting 1 in User ID mailbox 991.

Stratagy™ 4 / 6 / 24

INSTALLATION SECTION

CHAPTER 4
ACCESSING STRATAGY

TABLE OF CONTENTS

Chapter 4 — Accessing Stratagy

FIGURE LIST

CHAPTER 4
ACCESSING STRATAGY

1 INTRODUCTION

When the Stratagy system powers up, the system 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.

To perform these functions, the Stratagy 4 and 6, which are not equipped with a monitor and keyboard, are accessible through local or remote access. The Stratagy 24 provides direct access through its monitor and keyboard, and remote access is an option.

Remote access refers to accessing the Stratagy system via modem from a PC located at this or another site. Local access refers to accessing the Stratagy system directly via a cable connecting the Stratagy system with a laptop or PC. Both methods use Stratagy Remote software.

For initial installations, use local access for the Stratagy 4 and 6; access the Stratagy 24 directly through its monitor and keyboard. When modifying an existing installation, use whichever access method is convenient.

This chapter discusses:

- Using the Main Menu
- Local access
- Remote access

2 USING THE MAIN MENU

From the Main Menu (Figure 4-1) you can perform various functions of the Stratagy system. These include:

- Accessing the Users Menu (customizing User ID mailboxes)
- Generating reports
- Performing system shutdown (to display the Stratagy Configuration Utility Menu)
- Using the Filecopy Utility
- Setting system date and time

```
Users  Reports  Shutdown  Filecopy  Date/Time                          Main

Stratagy 4 1.05/5.37                Usage:      0/68%      Time:  08/29/94  17:04:03
  Voice Processing                  Users: 101             Started:  08/29/94  16:58:01
TAIS, Inc.Copyright 1994            Space: 31:46  94%      Shutdown:  08/30/94  01:30
     Strata DK 8                    Calls: 1013            Faxes:
                                    Notify Scan
                                       At 08/29/94 17:58
 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 4-1
Main Menu with Sample Data

To access the options (Users, Reports, etc.), press **Alt** and the first character (highlighted) of the option. The default password is Stratagy, with the first letter uppercase. For detailed information about using the Main Menu, see the Programming section, Chapter 3 "Accessing and Using Stratagy."

3 LOCAL ACCESS

Local access refers to accessing the Stratagy system directly via a cable connecting the Stratagy system with a laptop or PC. This section discusses:

- Connecting the cable
- Preparing the local system
- Using Stratagy locally

3.1 CONNECTING THE CABLE

Connect a null modem cable from COM1 or COM2 on the laptop/PC to the Stratagy system COM port. The default setting is COM2 for both the Stratagy 4 and 6. (See Chapter 3, "Installing the Hardware," Figure 3-6, "Stratagy 4 and 6 Front and Back Panels.") The Stratagy 24, which has direct access with the monitor and keyboard, is not configured for local access.

On the laptop/PC, the COM ports are serial ports (9-pin or 25-pin male connectors). On the Stratagy system, COM2 has a 25-pin male connector. You may need to use an adapter with the null modem cable to connect the laptop/PC to the Stratagy system.

3.2 PREPARING THE LOCAL SYSTEM

Preparing a laptop/PC involves loading the Stratagy Remote software.

IMPORTANT NOTE:
Do not install the Stratagy Remote software on a system with a screen saver program; Local access may not work.

Load the Stratagy Remote software on the laptop/PC:

1. If you are not at the DOS prompt (C:\), exit to the DOS prompt.

   If you are running Windows, exit Windows. Do **not** use Windows' MS-DOS Prompt option.
2. Insert the disk that contains the Stratagy Remote software into the disk drive.
3. From the DOS prompt (C:\), enter:

   ```
   COPY A:REMOTE
   ```

   This copies the Stratagy Remote software to the laptop/PC's disk drive C:. (This example assumes that your floppy drive is disk drive A:)
4. When the copy is complete, remove the diskette.

3.3 USING STRATAGY LOCALLY

This section discusses how to use the Stratagy system from a local laptop/PC, including access and disconnect.

3.3.1 ACCESSING STRATAGY USING A LOCAL LAPTOP/PC

To access Stratagy from a local laptop/PC, run the Stratagy Remote software.

1. To access the Stratagy Remote software, enter the following from the DOS prompt (C:\).

   NOTE:
   If you are running Windows, exit Windows; do ***not*** *use Windows' MS-DOS Prompt option.*

   If your local laptop uses COM1, enter:

   ```
   REMOTE /n /f
   ```

   If your local laptop uses COM2, enter:

   ```
   REMOTE /2 /n /f
   ```
2. When entered correctly, the screen displays the same information as on the Stratagy monitor (or would be displayed on the Stratagy monitor).

   NOTE:
   The screen may be blank because of the screen saver. If so, press the **spacebar**.

3.3.2 USING STRATAGY LOCALLY

Both the laptop/PC and the Stratagy system are active simultaneously. Use the laptop/PC as you would from the Stratagy monitor and keyboard. Note, however, that you cannot upload or download or files.

3.3.3 EXITING LOCAL ACCESS

To discontinue local access:

1. Be sure to leave the Stratagy system in the correct state.

   For example, if you want Stratagy up and running in call processing mode, leave Stratagy at the Main Menu. If you leave the Stratagy system at the Stratagy Configuration Utility Menu, etc, that is where it will be and call processing will **not** function.
2. Enter the following to disconnect from the Stratagy system:

   ```
   Alt + X
   ```

   The system prompts:

   OK to Exit (Y/N)

   Enter **Y** to exit the Stratagy system.

   Enter **N** to continue accessing the Stratagy system.
3. Disconnect the null modem cable.

4 REMOTE ACCESS

Remote access refers to accessing the Stratagy system via modem from a laptop or PC located at this or another site. This section discusses:

- Preparing the Stratagy system
- Preparing the Remote system
- Using Stratagy remotely

4.1 PREPARING THE STRATAGY SYSTEM

Preparing the Stratagy system to be accessible via modem from a remote laptop or PC involves installing and configuring the modem, and connecting it to the telephone system.

Install the Modem. The Stratagy 4, 6, and 24 systems offer an optional external 2400 baud modem. Follow the manufacturer's instructions.

NOTE:
For remote access, Stratagy supports only 2400 baud communication.

For information about installing fax/modems, see the Maintenance and Upgrades section, Chapter 2, "Upgrading the System."

Connect the modem to the Stratagy ports. The default settings are configured for Remote access as follows:

- For the Stratagy 24, use COM4. (Refer to Chapter 3, "Installing the Hardware", Figure 3-7, "Stratagy 24 Front and Back Panels.")
- For the Stratagy 4 and 6 with two COM ports, use COM1. (Refer to Chapter 3, "Installing the Hardware", Figure 3-6, "Stratagy 4 and 6 Front and Back Panels.")
- If the Stratagy 6 is upgraded to four COM ports, we recommend you use and configure COM4 for remote access. Use the Stratagy Configuration Utility (Chapter 5, "Configuring and Backing Up Stratagy").

Connect the modem telephone line. Use one of the following:

- Station off the telephone system
- Dedicated CO

4.2 PREPARING THE REMOTE SYSTEM

Preparing a laptop or PC located at this or another site to access Stratagy via modem involves configuring the remote PC's modem and loading the software.

IMPORTANT NOTE:
Do not install the Stratagy Remote software on a system with a screen saver program; remote access may not work.

4.2.1 CONFIGURING THE MODEM

Configure the modem on the remote system as one of the following:

COM1 with IRQ4 and no other devices on COM1 or using IRQ4

COM2 with IRQ3 and no other devices on COM2 or using IRQ3

4.2.2 LOADING THE STRATAGY REMOTE SOFTWARE

Load the Stratagy Remote software on the remote system:

1. If you are not at the DOS prompt (C:\), exit to the DOS prompt.

   If you are running Windows, exit Windows. Do **not** use Windows' MS-DOS Prompt option.
2. Insert the disk that contains the Stratagy Remote software into the disk drive.
3. From the DOS prompt (C:\), enter:

   ```
   COPY A:REMOTE
   ```

   This copies the Stratagy Remote software to the computer's disk drive C:. (This example assumes that your floppy drive is disk drive A:)
4. When the copy is complete, remove the diskette.

4.3 USING STRATAGY REMOTELY

This section discusses how to use the Stratagy system from a remote laptop or PC, including access and disconnect.

4.3.1 ACCESSING STRATAGY REMOTELY

To access Stratagy from the remote laptop or PC, run the Stratagy Remote software.

1. To access the Stratagy Remote software, enter the following from the DOS prompt (C:\).

   NOTE:
   *If you are running Windows, exit Windows; do **not** use Windows' MS-DOS Prompt option.*

   If your remote laptop or PC uses COM1, enter:

   ```
   REMOTE
   ```

   If your remote laptop or PC uses COM2, enter:

   ```
   REMOTE /2
   ```
2. Remote prompts:

   Phone number?

   Enter the exact digits the Stratagy Remote software must dial to access the Stratagy system modem.

For example, if the remote modem is on the station side of a switch and the Stratagy system modem is also on the station side of a switch that is answered by Stratagy, you might use 9,17145555555,,,,,,102 where each comma is a 2-second delay.

3. Once connected, the screen clears. The Stratagy Remote software prompts:

   Password?

   Enter the password. (The password is CommLine, with the "C" and "L" uppercase.)

4. When entered correctly, the screen displays the same information as on the Stratagy monitor (or would be displayed on the Stratagy monitor).

NOTE:
The screen may be blank because of the screen saver. If so, press the **spacebar**.

4.3.2 USING STRATAGY REMOTELY

Both the remote and the Stratagy system are active simultaneously. Use the remote as you would from the Stratagy monitor and keyboard. Note, however, that you cannot download or upload files.

4.3.3 EXITING REMOTE ACCESS

To discontinue remote access:

1. Be sure to leave the Stratagy system in the correct state.

   For example, if you want Stratagy up and running in call processing mode, leave Stratagy at the Main Menu. If you leave the Stratagy system at the Stratagy Configuration Utility Menu, etc, that is where it will be and call processing will **not** function.

2. Enter the following to disconnect from the Stratagy system:

   Alt + X

   The system prompts:

   OK to Exit (Y/N)

   Enter **Y** to exit the Stratagy system.

   Enter **N** to continue accessing the Stratagy system.

Stratagy™ 4 / 6 / 24

INSTALLATION SECTION

CHAPTER 5
CONFIGURING AND BACKING UP STRATAGY

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Chapter 5 – Configuring and Backing Up Stratagy

FIGURE LIST

TABLE LIST

CHAPTER 5

CONFIGURING AND BACKING UP STRATAGY

1 INTRODUCTION

This chapter provides detailed information about using the Stratagy Configuration Utility. This utility allows you to:

- Back up the Stratagy system
- Define Stratagy system configuration options
- Install Stratagy software from the floppy disk drive
- Select a Toshiba telephone switch or plug and play integration
- Define how Stratagy and other manufacturer's telephone systems communicate together

Backing up Stratagy. Involves backing up the database, greetings, and messages.

Defining Stratagy system configuration options. Involves setting system-wide parameters for Stratagy control, including system password, timeout values, computer configurations, and per port options.

Installing Stratagy software from the floppy disk drive. Required when upgrading a Stratagy 4 system to a Stratagy 6 system. It may also be required to re-install Stratagy System or Prompt software.

Selecting a Toshiba telephone switch or plug and play integration. If you have a Toshiba telephone system, selecting the appropriate system automatically defines the telephone system dial codes, telephone system tone patterns, and system integration patterns.

Defining how Stratagy and other manufacturer's telephone systems communicate together. If you do not have a Toshiba telephone system, selecting the appropriate system defines the telephone system dial codes. You would then need to define the telephone system tone patterns and system integration patterns.

1. Telephone system dial codes: how Stratagy controls certain dialing actions on the telephone system.
2. Telephone system tone patterns: tone patterns Stratagy must recognize when performing supervised call transfers, etc.
3. System integration patterns: if the telephone system supports integration, defines integration behavior of Stratagy with your phone system.

Once configured, Stratagy should be completely connected to your telephone system. The next step is to customize Stratagy by programming the User IDs to define the automated attendant and voice message system. For details, refer to the Programming section.

This chapter discusses:

- Accessing, Using, and Exiting the Stratagy Configuration Utility
- Stratagy Backup Utility
- Install from A: Drive
- Stratagy System Configuration
- Toshiba Switch Integration
- Toshiba Plug and Play
- Other Switch Integrations

2 ACCESSING, USING, AND EXITING THE STRATAGY CONFIGURATION UTILITY

IMPORTANT NOTE:
Stratagy will <u>not</u> process calls while accessing the Stratagy Configuration Utility. Exiting the Stratagy Configuration Utility causes Stratagy to re-boot with the new data, display the Main Menu, and resume call processing.

2.1 ACCESSING THE STRATAGY CONFIGURATION UTILITY

To access the Stratagy Configuration Utility Menu, exit Stratagy call processing.

1. From the Main Menu, select Shutdown. Press:
   `Alt + S`
2. Stratagy prompts:
   Password?
   Enter the password. (The default password is Stratagy, with the first letter uppercase. We recommend that you change this password in the Stratagy System Configuration before exiting the Stratagy Configuration Utility.)
3. Stratagy prompts:
   Shutdown the entire system? [NY]
   To shutdown the system, enter **Y**.
4. Stratagy confirms:
   Really SHUTDOWN the entire system? [N/Y]
   To shutdown the system, enter **Y**.

Stratagy starts shutdown. If any ports are in use, Stratagy delays shutting down the system for 60 seconds. At that time, Stratagy completes shutdown, cutting off any callers or users that are still active.

When shutdown is complete, the Stratagy Configuration Utility Menu displays. See Figure 5-1 for the Stratagy Configuration Utility Menu. **Only items 1 through 4 will appear on a Stratagy 4 system.**

```
Stratagy Configuration Utility

1. Stratagy Backup Utility
2. Stratagy System Configuration
3. Install from A: Drive
4. Toshiba Plug and Play
5. Toshiba Switch Integration
6. Other Switch Integrations
```

Figure 5-1
Stratagy Configuration Utility Menu

2.2 USING THE STRATAGY CONFIGURATION UTILITY MENU

To use the Stratagy Configuration Utility, select an option, press the option number, or use the arrow keys (↑ ↓), to highlight the option and press **Enter**. To return to the Stratagy Configuration Utility Menu, press **Esc**.

2.3 EXITING THE UTILITY

To exit the utility, press **Esc** from the Stratagy Configuration Utility Menu. Stratagy re-boots with new data configured.

When the system prompts:

Press any key to continue...

Press any key. The Stratagy Main Menu displays and Stratagy resumes call processing.

3 STRATAGY BACKUP UTILITY

To back up or restore your Stratagy system, select **1. Stratagy Backup Utility** from the Stratagy Configuration Utility Menu. The Stratagy Backup Utility Menu displays. See Figure 5-2.

```
Stratagy Backup Utility

1. Back up database
2. Back up greetings
3. Back up messages
```

Figure 5-2
Stratagy Backup Utility Menu

3.1 SELECT THE BACKUP OR RESTORE OPTIONS

Select the backup options based on the following:

Database:

- Each time the Stratagy Configuration Utility is used to modify the configuration and integration settings.
- Each time User IDs are customized — added, deleted, or modified.

Greetings:

- Each time you record special User ID mailbox greetings, IVR greetings, etc.
- Periodically to back up users' greeting recordings.

Messages:

- As appropriate. Some companies back up messages; others do not.

Since Stratagy is shutdown during backups, we recommend that you schedule them when Stratagy is least busy. With the System Announcement feature of the system User ID mailbox, you can let users know when the system will be shutdown for the next backup.

3.2. USING THE BACKUP UTILITY

The utility uses a series of menus. For each menu, the current selections are surrounded by pointers (▶◀). To select an option, press the highlighted letter or use the arrow keys (↑ ↓) to put pointers around the option and press **Enter**.

Once you select database, greetings, or messages, the utility displays the program information and reads the disk information. The utility then displays a series of menus.

The Function Menu displays the following options:

Backup
Restore
Compare
Configure
Quit

Select **Backup** to back up Stratagy. Proceed to "Backing Up Stratagy."

Select **Restore** to restore previous backed up files on Stratagy. Proceed to "Restoring Stratagy."

Select **Quit** to return to the Stratagy Backup Utility Menu.

3.2.1 BACKING UP STRATAGY

To back up Stratagy, proceed as follows:

- The second menu displays backup information:

  backup set (files to be backed up)
  DATABASE.SET (database)
  GREETING.SET (greetings)
  MSGS.SET (messages)

  backup from (drive)

  backup to (drive)

  backup type (full or partial)

  backup information:
  number of files selected for backup
  number of floppies needed for backup
  estimated backup time

  Select **Start Backup** to start the back up. Be sure to have the number of floppies needed pre-formatted. Proceed.

  Select **Cancel** to return to the Function Menu.

- The backup utility creates a catalog and loads the backup files. The utility then prompts whether to continue or cancel the backup.

  Select **continue** to begin the backup process. Insert diskette 1 into drive A. The screen displays:

  directory tree (what part of the directory is being backed up)

  file being copied

  diskette progress (track number of diskette A the utility is copying to)

  backup set information (catalog; type; name; verify type; estimated versus actual disks, files, bytes, time)

  The utility prompts for diskettes as needed. When complete, the utility displays the Backup Function Menu (step 1).

  To **cancel** backup, press **B** to return to the Function Menu.

3.2.1 RESTORING STRATAGY

To restore Stratagy, proceed as follows:

- The second menu displays restore information:

  restore set (files to be restored)
  DATABASE.SET (database)
  GREETING.SET (greetings)
  MSGS.SET (messages)

  restore from (drive)

  restore to (drive)

  restore files (specific files to be restored over)

  Select **Start Restore** to start the restore.

  Select **Cancel** to return to the Function Menu.

- The restore utility creates a catalog and loads the restore files. The utility then prompts whether to continue or cancel the restore.

  Select **continue** to begin the restore process. Insert diskette 1 into drive A. The screen displays:

  directory tree (what part of the directory is being restored)

  file being copied

  diskette progress (track number of diskette A the utility is copying to)

  restore set information (catalog; type; name; verify type)

  The utility prompts for diskettes as needed. When complete, the utility displays the Function Menu.

  To **cancel** restore, press **R** to return to the Function Menu.

---

4 STRATAGY SYSTEM CONFIGURATION

Use this function to change Stratagy's system options and parameters, define timeout values, define computer configurations, and control per port options.

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.

NOTE:
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.

From the Stratagy Configuration Utility Menu, press **2** or use the arrow keys (↑ ↓) to highlight **2. Stratagy System Configuration** and press **Enter**.

All Stratagy System Configuration options are available for the Stratagy 24. Fax settings are not available for the Stratagy 4 and 6. Serial port settings/definitions and SMDI/Serial integration definitions are not available for the Stratagy 4.

The Stratagy System Configuration Screen is split into two areas, the left screen area lists the actual options and their values, the right screen area lists context sensitive help for each option. See Figure 5-3 for a sample Stratagy System Configuration Screen. For a list of the options, their definitions, and default settings, see Table 5-1.

4.1 MODIFYING STRATAGY SYSTEM CONFIGURATION OPTIONS

To modify an option:

1. Use the arrow keys (↑ ↓), or **PgUp** and **PgDn**, to highlight the dial code parameter. Press **Enter**.
2. Modify the option using the line editor at the top of the screen.
3. Press **Enter** to save your changes. To escape without saving changes, press **Esc**.

4.2 EXITING THE STRATAGY SYSTEM CONFIGURATION SCREEN

When you have finished defining the Stratagy System Configuration options, press **Esc** to return to the Stratagy Configuration Utility Menu. We recommend that you back up the current data base at this time by selecting the Stratagy Backup Utility. Otherwise, press **Esc** again to reboot Stratagy and return to the Main Menu for call processing or Stratagy programming.

2. Stratagy System Configuration

```
#- Stratagy Configuration
set active_hold false
set adpcm_hq 64
set adpcm_nq 32
set adpcm_pq 32
set begin_rec_prompt true
set box_idx 411
set box_snd 998
set ca_file 'SMDR.DAT'
set ca_port 0
set clock_sync true
set cmt_maxlen 10
set defaults_box 997
set diskwarn 20
set dtmf_dly 0
set dtmf_gate true
set dtmf_on 20
set exit_digit '#'
set future_delivery 995
set gain_norm 0
set guest_defaults 996
set guest_min 90000
```

```
This program allows you to change different options
that affect how Stratagy operates. The options are
in groups that define a specific set of functions
or interactions. If a line begins with a # sign it
is a group heading or an option that has been
"commented out" and therefore has no effect.
```

Figure 5-3
Sample Strategy System Configuration Screen

PARAMETER	DESCRIPTION
active_hold	Controls how a caller must select 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 allows the caller to hold until he is either transferred, selects another extension, or presses * again to leave a message. Possible values: true, false Default: false
adpcm_hq	Sampling rate for outgoing greetings. The higher the sampling rate (kilo bits per second), the better the sound quality, however, the amount of disk space used is also higher. ***IMPORTANT NOTE:*** ***If you change this on an active system, all previously recorded greetings will be lost.*** Possible values: 32, 64 Recommended value: 64 Default: 64
adpcm_nq	Sampling rate for incoming messages. The higher the sampling rate (kilo bits per second), the better the sound quality, however, the amount of disk space used is also higher. ***IMPORTANT NOTE:*** ***If you change this on an active system, all previously recorded messages will be lost.*** Possible values: 32, 64 Recommended value: 32 Default: 32
adpcm_pq	Sampling rate for the system prompt file. This is predetermined by the sampling rate (kilo bits per second), at which the system prompt file was recorded. ***IMPORTANT NOTE:*** ***Do not change this parameter. All Stratagy system prompt files are recorded at 32 bits per second sampling rate.*** Default: 32

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions

PARAMETER	DESCRIPTION
begin_rec_prompt	Controls 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 during the record menu that is given after a recording. *TRUE*: The system plays the above prompt. *FALSE*: The system does not play the above prompt. The caller only hears a tone. Possible values: true, false Default: true
box_idx	Sets the User ID as the index directory for the specified port. The index directory is a special mode which allows Stratagy to search its User IDs for a match on the Directory Name fields. Example: Define this option as box_idx 411 1 to set User ID 411 as the directory search ID for port 1. *NOTE:* *Stratagy builds an index file based on information given in the Directory Name fields. It allows 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 and Extension recording – which really may play any recording you want.* Possible values: valid User ID and valid port Default: 411
box_snd	Sets the User ID as the direct message ID for the specified port. The direct message ID allows you 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. Possible values: valid User ID and valid port Default: 998
ca_file	File to store incoming SMDR data. The data is read from the logical port defined by the option ca_port. This is useful for collecting the SMDR output from a switch, storing it while the system runs, and then during a shutdown having a call accounting package read, analyze and manipulate the data. Possible values: valid DOS filename. The single quotes are required. Default: 'SMDR.DAT'
ca_port	Logical port to read SMDR data from while the system is running. The data will be stored in the file specified by the option ca_file. Possible values: 0, 1, 2, 3, 4 (port number) Default: 0

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
clock_sync	Whether the system tries to re-synchronize 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 allowed for recording a List comment. Possible values: 1 ~ 99 (seconds) Default: 10
defaults_box	User ID to use for the default values when creating a new User ID. The field values in the default User ID are copied into a new User ID upon initialization. Note: ■ Not all fields are copied. Comment, Extension, and Directory Name fields are initialized separately. If a Security Code is defined, it uses it as the default instead of using the User ID as the default. ■ All Notify and Auto-Schedule records are copied. Therefore, to initialize all new User IDs with a minimum set of Notify and Auto-Schedule settings, first define those settings in the "defaults box" 997 (unless you change the default User ID) before creating new User IDs. This is useful for setting standard, or default, settings such as message light ON/OFF. Operates in the same manner as the guest_defaults option. Possible values: valid User ID Default: 997
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 disk space falls below 20%, use a value of 20. Possible values: 1 ~ 99 Default: 20
dtmf_dly	Time between DTMF tones when Stratagy is dialing. In units of 10 ms. 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 (country-dependent)

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
dtmf_gate	Before dialing any User ID extension field Stratagy first verifies that DTMF was entered since the call last accessed the User ID (usually 991) specified in the DONE Chain of the initial User ID (usually 990). This "gate" prevents the transfer of a dead/phantom call to the operator on those switches that do not have disconnect supervision. Stratagy does not perform the "gate" action when the *Extension* field begins with @. *TRUE*: Stratagy "gate"s by requesting the caller to "Say yes at the tone" to complete the chain and transfer. *FALSE*: Do not have Stratagy complete the chain and transfer by requesting the caller "Say yes at the tone." Possible values: true, false Default: true
dtmf_on	Length of the DTMF tones played by the system. In units of 10 ms. Example: 20 is .2 sec (200 ms). Possible values: 10, 20, ..., 90 (units of 10 ms) Default: 20 (.2 sec)
exit_digit	Defines one (1) additional DTMF tone that will cause Stratagy to exit/stop during recordings and present the Recording options. Possible values: 0 ~ 9, *, # The single quotes are required. Default: '#'
future_delivery	User ID to use to allow users to specify the time and/or date when a message will be delivered for the future delivery feature. When the messages are awaiting future delivery, they are stored in the User ID specified. Therefore, the User ID cannot be used for any other purpose. The future delivery messages in this User ID cannot be deleted or listened to. This User ID mailbox cannot be accessed by a security code. Possible values: valid User ID Default: 995
gain_norm	Starting volume of the ports. Possible values: 8, -7, ..., 0, ..., 7, 8 Default: 0

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
guest_defaults	User ID to use for the default values when creating a new guest User ID. The field values in the default guest User ID are copied into a guest User ID upon initialization. Note: ■ Not all fields are copied. Comment, Extension, and Directory Name fields are initialized separately. If a Security Code is defined, it uses it as the default instead of using the User ID as the default. ■ All Notify and Auto-Schedule records are copied. Therefore, to initialize all new guest User IDs with a minimum set of Notify and Auto-Schedule settings, first define those settings in the "defaults box" 997 (unless you change the default User ID) before creating new User IDs. This is useful for setting standard, or default, settings such as message light ON/OFF. Operates the same way as the defaults_box option. Possible values: valid User ID Default: 996
guest_min	Starting User ID that may be used when creating a Guest User ID. When used in conjunction with the guest_max option, they limit the number of Guest User IDs that may be created. Example: If this value is 90000 then the first guest User ID that is created will have User ID 90000. The second guest will have User ID 90001, etc. Possible values: valid User ID Default: 90000
guest_max	Last User ID that may be used when creating a Guest User ID. When used in conjunction with the guest_min option, they limit the number of Guest User IDs that may 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 option setting Default: 90199
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 option should be true. Even if your switch does not support this capability, it usually has NO NEGATIVE EFFECT when set at true. *FALSE*: If you notice call transfer problems such as disconnects or three-way conferencing, try setting this to false. If the problems are not solved by setting this to false, set it back to true. Possible values: true, false Default: true

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
hot_box	If you remove the initial # sign and activate this option, when Stratagy detects a specific tone, Stratagy "jumps" to a specified User ID. Used to handle incoming faxes, detect connections from TDD machines for deaf communication, etc. There are 24 values available. 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) Stratagy 24 Default: comment line (# set hot_box 994) Stratagy 4 and 6 default: 994
lognam	System log file name. This log file contains start-up information, any execution error information, system actions, and shutdown information. *NOTE:* *This file keeps grows slowly. It is a good idea to periodically archive or delete it once or twice a year, whenever you perform preventive maintenance.* Possible values: valid DOS filename The single quotes are required. Default: 'Stratagy.LOG'
lpt_port	Printer port Stratagy should use when asked to print a report. Possible values: 0 (no printer), 1, 2 (port number) Default: 1
max_dl_inits	Number of simultaneous ports that may 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 until deciding to hang up. Possible values: 1 ~ 9 Default: 2
msg_log	By removing the initial # sign on this option and defining a valid DOS file name, Stratagy will log every received message and every User ID that checks for messages along with the DTMF entered. Possible values: valid DOS file name. The single quotes are required. Default: comment line (#set msg_log 'MSG.LOG')

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
n_ochan	Number of dedicated ports (starting at port 1) to reserve for outbound notify ports. This number must not exceed the total number of available ports. ***IMPORTANT NOTE:*** ***If the value is set to 0, Stratagy will attempt 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
nam_maxlen	Maximum number of seconds to allow 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
new_send	Whether a User ID (User) can send a message to a list of User IDs that is created when the destination is defined. *TRUE*: Allow a User ID (User) to send a message to a list of User IDs that is created when the destination is defined. When User presses 4 to send a new message, then 1 to select a User ID destination, the User is prompted to enter the next User ID or the # sign to finish entering User IDs. When the User presses 3 to send, the message is sent to every User ID that was entered. *FALSE*: Do not allow a User ID (User) to send a message to a list of User IDs that is created when the destination is defined. Possible values: true, false Default: false
notify_restriction	If you remove the initial # sign and activate this option with a valid port number, Stratagy restricts notify to use only the defined port. The port will still take 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: comment line (# set notify_restriction 1)
password	Sets the system password. The password is case sensitive; i.e., uppercase letters are different from lowercase letters. Possible values: up to 8 alphabetical characters. The single quotes are required. Default: 'Stratagy'

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
play_skip	Number of seconds to rewind or skip forward during message playback when a * or # is pressed. Possible values: 1 ~ 99 (seconds) Default: 5
please_hold	Whether or not the system says "Please hold while I try that extension for you" 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 should use on an incoming call. This allows 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 User ID and presses 1 to Play Messages, the system will tell him how many messages he has that will be automatically deleted when he presses 9 to return to the previous menu. ***IMPORTANT NOTE:*** ***Once a message is deleted by purging there is no way to retrieve it.*** Possible values: 0 (purging disabled), 1 ~ 99 (days) Default: 0
rotary	Whether rotary detection is enabled. With rotary detection enabled, the system detects and understands rotary entered digits. Note the following: ■ Only rotary digits 3 and higher are currently detected. Therefore, if you plan to use this feature, make sure that all your outside dialing User IDs do not have either digits 1 or 2. ■ There are no * and # signs on rotary phones. Therefore, setting this to true will introduce additional delays when the system detects the dialed number. Possible values: true (enabled), false (disabled) Default: false

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
security_min_length	Minimum length security code that Stratagy will accept as a new security code when a user attempts to change it from a telephone. Possible values: 1 ~ 8 Default: 1
short_direct_send	What is played when the direct message code (usually 998) is entered followed by the User ID. *TRUE*: "You entered" and the User ID's name and extension recording plays. *FALSE*: User ID's current greeting plays (as if received a Ring No Answer). Possible values: true, false Default: false
shutdown	Day and time Stratagy performs automatic shutdown for disk 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 at which the shutdown occurs, this is given in 24 hour format with the colon (:) omitted. For example, 9:30 p.m. is 2130. Default: '2 130' (Tuesday at 1:30 a.m.)
tape_length	When a User selects option 1, and then 78 (continuous play) or 79 (continuous delete), this option 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: 10 ~ 99 (minutes) Default: 30
timestamp_forwards	Controls the date/time stamp the system uses on a forwarded message. *TRUE*: Use the date/time that the message was forwarded. *FALSE*: Use the original date and time the message was first recorded. Possible values: true, false Default: true

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
tmo_blank	Total number of minutes Stratagy waits before blanking the Main Menu screen to prevent screen burn-in. NOTE: This option only blanks the screen if the current screen is the Main Menu. Possible values: 0 (disabled), 1 ~ 99 (minutes) Default: 5
tmo_dtmf	Amount of time Stratagy waits to determine that the caller has finished entering DTMF digits (provided that they do not press the #). In units of 100 ms. Possible values: 10 ~ 99 (units of 100 ms) Default: 12
tmo_hold	Number of seconds before Stratagy attempts to transfer a caller 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 after which Stratagy attempts to transfer the caller again. If that file is missing, Stratagy is silent for the number of seconds specified by this option. *NOTE:* *To have callers hear a specialty recording while on hold, record over HOLD.VOX by accessing the System Administration Menu. See the Programming section, Chapter 5, "System Administrator's User ID" for details.* Default: 20 (seconds)
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 under rare circumstances when a telephone switch may not release a station that is connected to Stratagy even after Stratagy has gone on-hook. Default: 0
tmo_menu	Amount of time Stratagy waits before repeating a choice menu. In units of 100 ms. Possible values: 1 ~ 99 (units of 100 ms) Default: 20
tmo_pickup	Minimum amount of time the system waits between an on-hook and off-hook event. In units of 100 ms. Possible values: 10 ~ 99 (units of 100 ms) Default: 20

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
tmo_serial	Maximum number of seconds Stratagy waits for a response when communicating with other peripheral devices through a serial port. Otherwise, Stratagy could potentially wait forever. Possible values: 2 ~ 99 (seconds) Default: 2 Stratagy 6 and 24 only.
tmo_silence	Maximum amount of silence time the system waits before deciding to finish a recording and hang up. In seconds. Possible values: 3 ~ 9 (seconds) Default: 5
tmo_sound	Maximum amount of sound/dial tone time the system waits before deciding to finish a recording and hang up. In seconds. Possible values: 3 ~ 9 (seconds) Default: 5
user_log	If you remove the initial # sign and activate this option, whenever a User ID is accessed via DTMF, the system will make an entry in the log file specified. The log entry consists of the date, time and User ID. This is useful for creating a data file which can later be analyzed for call distributions and accesses by dates, days, and times. Possible values: valid DOS file name. The single quotes are required. Default: comment line (# set user_log 'USERID.LOG')
baud1	Baud rate for logical serial port 1. This operates on the physical COM port as defined by set serial_port1. Possible values: 300, 1200, 2400, 9600. Default: 2400 Stratagy 6 and 24 only.
baud2	Baud rate for logical serial port 2. This operates on the physical COM port as defined by set serial_port2. Possible values: 300, 1200, 2400, 9600. Default: 2400 Stratagy 6 and 24 only.
baud3	Baud rate for logical serial port 3. This operates on the physical COM port as defined by set serial_port3. Possible values: 300, 1200, 2400, 9600. Default: 2400 Stratagy 6 and 24 only.
baud4	Baud rate for logical serial port 4. This operates on the physical COM port as defined by set serial_port4. Possible values: 300, 1200, 2400, 9600. Default: 2400 Stratagy 6 and 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
databits1	Number of data bits for logical serial port 1. Possible values: 7, 8 Default: 8 Stratagy 6 and 24 only.
databits2	Number of data bits for logical serial port 2. Possible values: 7, 8 Default: 8 Stratagy 6 and 24 only.
databits3	Number of data bits for logical serial port 3. Possible values: 7, 8 Default: 8 Stratagy 6 and 24 only.
databits4	Number of data bits for logical serial port 4. Possible values: 7, 8 Default: 8 Stratagy 6 and 24 only.
parity1	Parity to use for logical serial port 1. Possible values: none, even, odd, mark, space Default: none Stratagy 6 and 24 only.
parity2	Parity to use for logical serial port 2. Possible values: none, even, odd, mark, space Default: none Stratagy 6 and 24 only.
parity3	Parity to use for logical serial port 3. Possible values: none, even, odd, mark, space Default: none Stratagy 6 and 24 only.
parity4	Parity to use for logical serial port 4. Possible values: none, even, odd, mark, space Default: none Stratagy 6 and 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
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 option. To define serial port 1 as active, simply define the COM port where it should be mapped. Example: Set this option to 1 to connect serial port 1 (Stratagy) to COM port 1. Possible values: 0 (not connected), 1 (COM port 1), 2 (COM port 2), 3 (COM port 3), 4 (COM port 4) Default: 0 Stratagy 6 and 24 only.
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 option. To define serial port 2 as active, simply define the COM port where it should be mapped. Example: Set this option to 2 to connect serial port 2 (Stratagy) to COM port 2. Possible values: 0 (not connected), 1 (COM port 1), 2 (COM port 2), 3 (COM port 3), 4 (COM port 4) Default: 0 Stratagy 6 and 24 only.
serial_port3	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 option. To define serial port 3 as active, simply define the COM port where it should be mapped. Example: Set this option to 3 to connect serial port 3 (Stratagy) to COM port 3. Possible values: 0 (not connected), 1 (COM port 1), 2 (COM port 2), 3 (COM port 3), 4 (COM port 4) Default: 0 Stratagy 6 and 24 only.
serial_port4	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 option. To define serial port 4 as active, simply define the COM port where it should be mapped. Example: Set this option to 4 to connect serial port 4 (Stratagy) to COM port 4. Possible values: 0 (not connected), 1 (COM port 1), 2 (COM port 2), 3 (COM port 3), 4 (COM port 4) Default: 0 Stratagy 6 and 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
stopbits1	Number of stop bits to use for logical serial port 1. Possible values: 0, 1, 2 Default: 1 Stratagy 6 and 24 only.
stopbits2	Number of stop bits to use for logical serial port 2. Possible values: 0, 1, 2 Default: 1 Stratagy 6 and 24 only.
stopbits3	Number of stop bits to use for logical serial port 3. Possible values: 0, 1, 2 Default: 1 Stratagy 6 and 24 only.
stopbits4	Number of stop bits to use for logical serial port 4. Possible values: 0, 1, 2 Default: 1 Stratagy 6 and 24 only.
fax_dl_init	Dial codes Stratagy dials when a user dials **7 2** to send a fax message he has received to a fax machine for pick up. Generally, this is the code for accessing a public network line, i. e., "**9**". Typical value: dial code to access an outside line. The single quotes are required. Default: '9,' (dial 9 and pause for 2 sec) Stratagy 24 only.
fax_flow_control	Class 2 command to set the type of flow control for the fax/modem. *'&K3'* Zoom fax/modem *'1Q3 X3 &K3'* Aceex fax/modem *'X3 &K3'* Practical Peripherals fax/modem Possible values: Include *' ', ' '.* The single quotes are required. Default: '&K3' Stratagy 24 only.
fax_id	Fax/modem ID or telephone number used for identification to other fax devices. Single quotes are required. Default: ' ' (no identification) Stratagy 24 only.
fax_max_retries	Maximum number of times, after the first, to retry sending a fax if it is unsuccessful. Used only when sending the fax in two-call mode; i.e., the caller enters a fax telephone number that the fax/modem calls and then sends the fax. Possible values: 0 ~ 9 (retries) Default: 1 Stratagy 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
fax_receive_reverse	Setting depends solely on the Class 2 fax/modem used. Controls whether to reverse the fax databits on receive. *TRUE*: Setting for most fax/modems. *FALSE*: Setting for some fax/modems. If the faxes received are reverse (mirror images) from the original, try setting this option to FALSE. Possible values: true, false Default: true Stratagy 24 only.
fax_receive_speed	Maximum speed Stratagy allows for receiving faxes. Set this appropriately depending upon the type and speed of your computer. Normally a value of 3 works for 386 CPUs at 33 MHz or higher. If you experience data loss on your faxes, lower this setting. '': (empty string) as fast as possible *'0'*: 2400 *'1'*: 4800 *'3'*: 9600 Possible values: '', '0', '1', '3' The single quotes are required. Default: '1' Stratagy 24 only.
fax_requeue_interval	Number of minutes to wait between retries for fax_max_retries. Possible values: 1 ~ 99 (minutes) Default: 5 Stratagy 24 only.
fax_reset	Reset command to send to the fax/modem when DTR is dropped. Use *'&D3'* for most fax/modems. Single quotes are required. Default: '&D3' Stratagy 24 only.
fax_send_reverse	Setting depends solely on the Class 2 fax/modem used. *FALSE*: Setting for most fax/modems. *TRUE*: Setting for some fax/modems. If the faxes received are reverse (mirror images) from the original, try setting this option to TRUE. Possible values: true, false Default: false Stratagy 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
fax_send_speed	Maximum speed that Stratagy will use for sending faxes. Depending upon the type and speed of your computer set this appropriately. Normally a value of 3 works for 386 CPUs at 33 MHz or higher. If you experience data loss on your faxes, lower this setting. '': (empty string) as fast as possible *'0'*: 2400 *'1'*: 4800 *'3'*: 9600 Possible values: '', '0', '1', '3' The single quotes are required. Default: '1' Stratagy 24 only.
fax_start_char	Whether the fax/modem sends a control start character. *FALSE*: Setting for most fax/modems, including Zoom. *TRUE*: Setting for some fax/modems, including Accex and Practical Peripherals. Possible values: true, false Default: true Stratagy 24 only.
fax1	Station, or extension, number connected to the first fax/modem. Example: If the first fax/modem is connected to extension 101, use the value '101'. The single quotes are required. Default: ' ' (no station or extension number) Stratagy 24 only.
fax2	Station, or extension, number connected to the second fax/modem. Example: If the second fax/modem is connected to extension 102, use the value '102'. The single quotes are required. Default: ' ' (no station or extension number) Stratagy 24 only.
smdi_base_port	Some SMDI installations use logical terminal numbers that do not begin with 1 (for example if it instead 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. Default: 1 Stratagy 6 and 24 only.
smdi_port	Logical serial port Stratagy uses for SMDI integration. Possible values: 0 (disables SMDI integration), 1, 2 (port number) Default: 0 Stratagy 6 and 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
smdi_pretimeout	Maximum number of seconds that an SMDI packet can PRECEED the forwarded call. Possible values: 5 ~ 20 (seconds) Default: 50 Stratagy 6 and 24 only.
smdi_type	Protocol Stratagy uses when using 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' Stratagy 6 and 24 only.
box_grt	Sets the starting User ID for the port given as the last value. Example: 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 Defaults: 990 1 990 2 . . . 990 24
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 setup 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 Defaults: 1 1 1 2 . . . 1 24

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

PARAMETER	DESCRIPTION
did_dtmf	How DID digits are passed to Stratagy. *TRUE*: Stratagy expects the DID digits as DTMF. *FALSE*: Stratagy expects the digits as loop pulse. Possible values: true, false Default: comment line (#set did_dtmf true) Stratagy 6 and 24 only.
did_mode	If this option is activated by removing the starting # character, it will define the type of line connected to Stratagy. *TRUE*: Stratagy assumed DID lines. *FALSE*: Stratagy assumes a T1 line. Possible values: true, false Default: comment line (#set did_mode true) Stratagy 6 and 24 only.
ring_mode	Method new calls are indicated when DID or T1 lines are connected to Stratagy *TRUE*: New calls are indicated by ring voltage. *FALSE*: New calls are seen when loop current first comes on. Possible values: true, false Default: comment line (#set ring_mode true) Stratagy 6 and 24 only.
t1_mode	Whether Stratagy should wait for a wink complete before processing the call. *TRUE*: Wait. *FALSE*: Do not wait. Possible values: true, false Default: comment line (#set t1_mod true) Stratagy 6 and 24 only.

Table 5-1
Stratagy System Configuration Options – Parameters and Definitions (continued)

5 INSTALL FROM A: DRIVE

Use this function to install Stratagy software from diskettes using the Stratagy floppy A: drive. This is required when upgrading a Stratagy 4 system to a Stratagy 6 system. It may also be necessary to re-install Stratagy System or Prompt software from floppy diskettes.

IMPORTANT NOTE:
Before installing or re-installing Stratagy System software, ensure you have a current backup of system data. We recommend that you use the Stratagy Backup initially and periodically to preserve system data.

From the Stratagy Configuration Utility Menu, press 3 or use the arrow keys (↑ ↓) to highlight `3. Install from A: Drive` and press **Enter**.

Stratagy prompts:

> Insert the first disk in the floppy drive, and press any key...

Insert the first diskette. Follow the directions. When complete, the Stratagy Configuration Utility Menu displays.

6 TOSHIBA PLUG AND PLAY

Use this function to change the Stratagy system to a different Toshiba Plug and Play capability than what has been pre-installed as a factory setting. Each Stratagy system has been pre-installed at the factory for out-of-box (Plug and Play) operation on a specific Toshiba telephone system as follows:

- Stratagy 4 with Strata DK8
- Stratagy 6 with Strata DK16
- Stratagy 24 with Strata DK280A

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

IMPORTANT NOTE:
The above Strata DK must be configured for the appropriate voice mail system settings individually. See the specific Strata DK Installation and Maintenance manual for these procedures.

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

Stratagy User ID 990 also contains a pre-installed greeting that says "Thank you for calling" and User ID 991 says "To reach the party... dial the extension..."

All calls into a Stratagy system with Toshiba Plug and Play will hear the above greetings and transfer to the dial Strata DK station. If the Strata DK station (extension number) is busy or does not answer, Stratagy will automatically play a greeting that says "User ID XXX (Strata DK dialed station number) is not available or busy," then prompt the caller to leave a message, etc.

This is the out-of-box, Toshiba Plug and Play operation for all Stratagy systems.

IMPORTANT NOTE:
If you are modifying an existing Stratagy system, selecting this function changes all the settings to the new Toshiba telephone system default values, and deletes the User ID (mailbox) customizations and installs the Strata default mailboxes.

NOTE:
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.

From the Stratagy Configuration Utility Menu, press 4 or use the arrow keys (↑ ↓) to highlight `4. Toshiba Plug and Play` and press **Enter**.

See Figure 5-4 for the Toshiba Plug and Play options. To select an option, use the arrow keys (↑ ↓) to highlight the option and press **Enter**.

```
Toshiba Plug and Play

        1. STRATA DK 8
        2. STRATA DK 16
        3. STRATA DK 280A
```

Figure 5-4
Toshiba Plug and Play Screen

Once you select an option, the Stratagy utility automatically defines the telephone system dial codes, telephone system tone patterns, and system integration patterns for the specific phone system. The Stratagy Configuration Utility Menu then displays. The Toshiba telephone system is complete and the selected system displays in the Main Menu. No other Stratagy steps are necessary.

We recommend that you back up the current database at this time by selecting the Stratagy Backup Utility.

Otherwise, press **Esc** again to reboot Stratagy and return to the Main Menu for call processing or Stratagy programming.

7 TOSHIBA SWITCH INTEGRATION

Use this function to change the Toshiba Plug and Play capability that has been pre-installed with each Stratagy system (see "Toshiba Plug and Play"). Selecting an option automatically defines the Toshiba telephone system dial codes, Toshiba telephone system tone patterns, and Toshiba system integration patterns for the specific Toshiba telephone system. No other Stratagy system steps are necessary.

If you are modifying an existing Stratagy system, selecting this function changes all the settings to the new Toshiba telephone system values. The User ID (mailboxes) customizations are not deleted or changed.

NOTE:
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.

From the Stratagy Configuration Utility Menu, press 5 or use the arrow keys (↑ ↓) to highlight **5. Toshiba Switch Integration** and press **Enter**.

See Figure 5-5 for the Toshiba Switch Integration options. To select an option, use the arrow keys (↑ ↓) to highlight the option and press **Enter**.

Once you select an option, the Stratagy utility automatically defines the Toshiba telephone system dial codes, Toshiba telephone system tone patterns, and Toshiba system integration patterns for the specific phone system. The Stratagy Configuration Utility Menu then displays. Toshiba telephone system integration is complete and the selected system displays in the Main Menu. No other Stratagy system steps are necessary.

We recommend that you back up the current database at this time by selecting the Stratagy Backup Utility. Otherwise, press **Esc** again to reboot Stratagy and return to the Main Menu for call processing or Stratagy programming.

5. Toshiba Switch Integration

```
# Name: Strata DK 8/16/24/56/96                          2001
# Name: Strata DK 280                                    2002
# Name: Strata DK 280 with RS-232 Integration            2006
# Name: Perception e/ex                                  2003
# Name: Perception 4000                                  2004
# Name: Strata e VIe, XIIe, XXe, Se                      2005
```

Figure 5-5
Toshiba Switch Integration Screen

8 OTHER SWITCH INTEGRATIONS

Use this function to initially configure or modify the following for non-Toshiba telephone systems:

- Telephone system dial codes
- Telephone system tone patterns
- System integration patterns

IMPORTANT NOTE:
Be sure to configure the Stratagy system in the above-listed order.

NOTE:
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.

From the Stratagy Configuration Utility Menu, press **6** or use the arrow keys (↑ ↓) to highlight **6. Other Switch Integrations** and press **Enter**.

The Other Switch Integrations Menu (Figure 5-6) displays. To select an option, press the option number or use the arrow keys (↑ ↓) to highlight the option and press **Enter**.

```
Other Switch Integrations

1. Telephone System Dial Codes
2. Telephone System Tone Patterns
3. System Integration Patterns
```

Figure 5-6
Other Switch Integrations Menu

When you have finished defining the codes and patterns, press **Esc** to exit the Other Switch Integrations Menu and return to the Stratagy Configuration Utility.

We recommend that you back up the current database at this time by selecting the Stratagy Backup Utility. Otherwise, press **Esc** again to reboot Stratagy and return to the Main Menu for call processing or Stratagy programming.

8.1 DEFINING TELEPHONE SYSTEM DIAL CODES

Stratagy controls certain actions on your telephone system, or the definition of your telephone system dial codes. With this option, Stratagy "learns" the dial codes of your telephone system. See Figure 5-7 for a sample Telephone System Dial Codes Screen. For a listing of the dial code parameters and their definitions, see Table 5-2.

8.1.1 SELECTING DEFAULT DIAL CODES

To access Stratagy's predefined telephone system dial codes, press **F1** from the Telephone System Dial Codes Screen. These closely (if not exactly) match the telephone system you are using. For a sample Load Telephone System Dial Codes Screen, see Figure 5-8.

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

To load a default setting, use the arrow keys (↑ ↓) to highlight your selection and press **Enter**. The non-Toshiba telephone system selected will not appear on the Stratagy system Main Menu. It will be blank unless modified in the next step.

To cancel this operation without selecting any default dial codes, press **Esc**.

8.1.2 MODIFYING THE DIAL CODES

If the telephone system you desire does not appear when **F1** is used from the telephone system dial codes screen or further modifications to the dial codes are needed, proceed as follows. To modify a telephone system dial code:

1. Use the arrow keys (↑ ↓), or **PgUp** and **PgDn**, to highlight the dial code parameter. Press **Enter**.
2. Modify the dial code using the line editor at the top of the screen.
3. Press **Enter** to save your changes. To escape without keeping any changes, press **Esc**.

8.1.3 EXITING THE TELEPHONE SYSTEM DIAL CODES SCREEN

When you have finished defining the Telephone System Dial Codes, press **Esc** to return to the Other Switch Integrations Menu.

```
                    1. Telephone System Dial Codes

# Dial code to put a caller on transfer hold          : F-
# Dial code to use when there is no transfer dialtone : F-
# Dial code to return to caller after Ring No Answer  : F-
# Dial code to return to caller when there is a Busy  : F-
# Dial code to use after a call screening reject      : F-
# Dial code to connect the caller to the extension    : H
# Number of seconds to wait for dialtone detection    : 4
# Number of 1/100 seconds to use for Flash time       : 55
# Which DTMF tone to listen to for answer detection   : a
# Which DTMF tone to listen to for hangup detection   : d
# What to dial BEFORE dialing the User ID extension   :
# What to dial AFTER dialing the User ID extension    : 1
# What to dial when the system first starts up        :
# What to dial when the system performs a shutdown    :
# What to dial when a port goes off-hook              :
# Switch name to display on MAIN screen               : 'STRATA DK 280'
```

Figure 5-7
Sample Telephone System Dial Codes Screen

```
                F1 - Load Telephone System Dial Codes

# Name: Alcatel DCD 601                                          1031
# Name: Alcatel STK Digitmat 2000                                1034
# Name: AT&T 1AESS (analog), 5ESS (digital) CO                   1035
# Name: AT&T Merlin II                                           1005
# Name: AT&T Merlin Legend                                       1016
# Name: AT&T Partner/Partner+                                    1017
# Name: AT&T System 25                                           1037
# Name: AT&T System 75 and Definity                              1038
# Name: Centrex                                                  1039
# Name: Comdial 1410/2264                                        1040
# Name: Contel Executone                                         1042
# Name: EGL-ONE                                                  1043
# Name: Ericsson BCS150                                          1044
# Name: Ericsson MD110                                           1045
# Name: Ericsson MINC                                            1046
# Name: Ericsson Information Systems Prodigy                     1047
# Name: Fujitsu Focus 100                                        1048
# Name: Fujitsu Focus 960 PBX                                    1049
# Name: Fujitsu F-9600 PBX                                       1050
# Name: Fujitsu I123                                             1051
# Name: ISOETEC EZ-1 36/66/96                                    1053
# Name: ISOTEC 108/228                                           1054
```

Figure 5-8
Sample Load Telephone System Dial Codes Screen

PARAMETER	DESCRIPTION
# DIAL CODE TO PUT A CALLER ON TRANSFER HOLD:	Before Stratagy attempts to transfer a caller to an extension, the code Stratagy sends the telephone system to put the current call on "transfer hold" and send the transfer (or intercom) dial tone. Typical value: F- (flash-hook)
# DIAL CODE TO USE WHEN THERE IS NO TRANSFER DIALTONE:	If Stratagy is configured to verify that transfer dial tone exists before attempting to transfer a call to the requested extension, the code Stratagy dials to return to the caller if transfer dial tone is not available. If this occurs, Stratagy will treat the attempted transfer the same as if the attempted extension were BUSY. Typical value: F- (flash-hook)
# DIAL CODE TO RETURN TO CALLER AFTER RING NO ANSWER:	During supervised call transfers, the code Stratagy dials to request the telephone switch to reconnect the caller to Stratagy if the attempted extension rings and does not answer within the specified number of rings (which is configurable per User ID). Typical value: F- (flash-hook)
# DIAL CODE TO RETURN TO CALLER WHEN THERE IS A BUSY:	During supervised call transfers, the code Stratagy dials to request the telephone switch to reconnect the caller to Stratagy if the attempted extension is busy. Typical value: F- (flash-hook)
# DIAL CODE TO USE AFTER A CALL SCREENING REJECT:	During supervised call transfers, with Call Screening ON, if the extension called rejects the caller, the code Stratagy dials to reconnect to the caller and play the User ID's current greeting. Typical value: F- (flash-hook)
# DIAL CODE TO CONNECT THE CALLER TO THE EXTENSION:	Dial code Stratagy dials during supervised call transfers to complete the call transfer either after detecting an answer at the called extension, or if Call Screening is ON, after the extension called accepts the call. Typical value: H (Hang Up)
# NUMBER OF SECONDS TO WAIT FOR DIALTONE DETECTION:	If your telephone system has a limited number of DTMF receivers, or intercom paths for call transfers, and potentially might not have one always available to Stratagy for a call transfer, enable Stratagy's dial tone detection by setting this value greater than 0. The value is the longest amount of time Stratagy will wait for the telephone system to give Stratagy 1 second of dial tone. Typical value: 4
# NUMBER OF 1/100 SECONDS TO USE FOR FLASH TIME:	Time Stratagy must remain on-hook while performing a flash-hook. Typical value: 55 (just over half a second)

Table 5-2
Telephone System Dial Codes — Parameters and Definitions

PARAMETER	DESCRIPTION
# 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 allows for faster answer detection and call processing. If your telephone system supports this feature, enter the DTMF tone. Typical value: a
# WHICH DTMF TONE TO LISTEN TO FOR HANG UP DETECTION:	Some telephone systems play a specific DTMF tone whenever a caller hangs up. This allows for 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:	Code Stratagy dials after dial tone detection, but 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 are using -1 to eliminate (system wide) voice announce during a call transfer by Stratagy (which is necessary if you want Stratagy to perform supervised transfers). Or, sometimes you may want to 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. A typical application is removing call forwarding on the Stratagy ports.
# WHAT TO DIAL WHEN THE SYSTEM PERFORMS A SHUTDOWN:	Codes Stratagy dials when it shuts down. A typical application is 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 some special feature, such as when special types of serial, or RS-232, integrations.
# SWITCH NAME TO DISPLAY ON MAIN SCREEN:	The name of the telephone system Stratagy displays as part of the product identification section of the Main Menu.

Table 5-2
Telephone System Dial Codes — Parameters and Definitions (continued)

8.2 DEFINING TELEPHONE SYSTEM TONE PATTERNS

Use this option to define for Stratagy the actual telephone system tone patterns it must recognize when performing supervised call transfers.

To define the tone patterns the Stratagy system uses a utility called GetTones. This program enables Stratagy to "learn" the tone patterns that define ringing, busy, hang up, and reorder.

NOTE:
The tone patterns for Toshiba telephone systems are automatically defined during setup. Use GetTones only when initially configuring non-Toshiba telephone systems.

8.2.1 PREPARING TO USE GETTONES

Before running GetTones, be sure you have done the following:

- Defined the Telephone System Dial Codes.
- Connected port 1 and port 2 to valid, working extensions on the telephone system.
- Found out the extension number to which port 1 is connected.
- Verified that the extension that port 1 is connected to is not in any hunt group, and does not have any call forwarding defined.
- Verified that the extension that port 2 is connected to has outside line access and can dial a test telephone number that will be answered (calling Time or Weather are good choices).
- Defined a non-Stratagy extension that has a telephone connected and will not be answered.

8.2.2 USING GETTONES

IMPORTANT NOTE:
Before you run the GetTones, you must have done the previous.

To access GetTones, enter **Y** to the prompt.

Before GetTones can "learn" the tone patterns, it must have some parameters defined. See Figure 5-9 for the GetTones Utility Screen. For a list of the parameters and their definitions, see Table 5-3.

After you complete the last parameter, GetTones obtains the ring, busy, reorder, and hang up patterns of the telephone system.

NOTE:
If you encounter any problems with GetTones, you may need to run manual utilities to obtain the telephone system tone patterns. Please contact Toshiba Technical Support for more information.

8.2.3 EXITING THE TELEPHONE SYSTEM TONE PATTERNS SCREEN

When you have finished defining the Telephone System Tone Patterns, press Esc to return to the Other Switch Integrations Menu.

```
GetTones, version 1.1

Are you sure you want to run this routine? [y/n] y

Enter the outdial code:
Enter the reorder code:
Enter the station number of port 1:
Enter the RNA test station number:
TRIAL Number: 1
Getting RING pattern.
If there is no activity after 30 seconds, press the Spacebar.
```

Figure 5-9
GetTones Utility Screen

PARAMETER	DESCRIPTION
ENTER THE OUTDIAL CODE:	Code and telephone number GetTones dials to establish an outside connection to test for tone patterns. Good choices for telephone numbers are time and weather. You must also enter all necessary codes to obtain outside line access. Example: If time were 853-1212 and you needed to dial 9 and pause to get an outside line, you would enter: Enter the outdial code: `9,8531212`
ENTER THE REORDER CODE:	Any dial code that will generate a REORDER tone pattern on the telephone system. Typically, invalid extension numbers work well. Example: The following generally works. Enter the reorder code: `666`
ENTER THE STATION NUMBER OF PORT 1:	The station number connected to port 1.
ENTER THE RNA TEST STATION NUMBER:	The non-Stratagy extension that has a telephone connected and will not be answered.

Table 5-3
GetTones — Parameters and Definitions

8.3 DEFINING SYSTEM INTEGRATION PATTERNS

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

See Figure 5-10 for a sample System Integration Patterns Screen. For a listing of the System Integration Patterns parameters and definitions, see Table 5-4.

Some of the pre-defined telephone system dial codes already contain integration information, while others are configurable. If there are no integration definitions and you know that your telephone system supports inband DTMF integration, use the Integration Helper program to assist you in defining the integration patterns.

8.3.1 DEFINING THE SYSTEM INTEGRATION PATTERNS FIELDS

Define the following:

1. Integration Timeout by 1/10. Refer to Table 5-4.
2. The remaining fields. These fields define the integration strings that Stratagy should match. If there are no integration definitions and you know that your telephone system supports inband DTMF integration, use the Integration Helper. Otherwise, proceed to "Defining the Integration Strings Stratagy Matches."

NOTE:
Use the Integration Helper only when initially configuring non-Toshiba telephone systems.

8.3.2 PREPARING TO USE THE INTEGRATION HELPER

Before running the Integration Helper, verify that you have:

- Enabled your telephone system for "voice mail" integration
- Programmed a test extension for call coverage, or call forwarding, to Stratagy
- Made available another extension for placing test calls

8.3.3 USING THE INTEGRATION HELPER

Start the Integration Helper. From the System Integration Patterns Screen, press **F1**.

Next, make a series of test calls. The idea is to place sample calls that generate integration information that the Integration Helper can capture. The screen displays:

Waiting for a call on any port...
To abort press **ESC**

Place test calls of the following types:

1. Available extension calling test extension for RING NO ANSWER.
   - Place a test call by calling from the available extension to your test extension.
   - After a Ring No Answer condition occurs, the call should forward to Stratagy's Integration Helper, which will answer the call and capture the digits it hears played by the telephone system.
   - After the Integration Helper has captured the digits, press **R** for Ring No Answer.
2. Available extension calling test extension while test extension is BUSY.
   - Verify that the test extension has been call forwarded BUSY to the Stratagy ports.
   - Make the test extension busy.
   - From the available extension, call the test extension which should forward to the Integration Helper immediately.
   - After the Integration Helper has captured the digits (if any), press **B** for BUSY.
3. Test extension calling directly to Stratagy.
   - From the test extension, call Stratagy.
   - After the Integration Helper has captured the digits (if any), press **D** for DIRECT call.

NOTE:
Some telephone systems use different codes depending upon whether the call to Stratagy was made by dialing an extension or by pressing a message light. Run both tests if you suspect this to be true of your telephone system.

4. Available extension using CO line to call in and ring test extension for RING NO ANSWER.
   - From the available extension, select an outside CO line and call in to where you are installing Stratagy.
   - When the Receptionist answers, ask him to transfer you (unsupervised, or blind) to the test extension, which should forward to Stratagy after some rings.
   - After the Integration Helper has captured the digits, press **R** for RING NO ANSWER.
5. Available extension using CO line to call in while test extension is BUSY.
   - Make the test extension busy.
   - From the available extension, select an outside CO line and call the company where you are located.

- When the Receptionist answers, ask him to transfer you (unsupervised, or blind) to the test extension, which should forward to Stratagy immediately.
- After the Integration Helper has captured the digits, press **B** for BUSY.

When you have finished, press **Esc** to return to the System Integration Patterns Screen, which should now be filled with the captured codes and descriptions of those codes.

8.3.4 DEFINING THE INTEGRATION STRINGS STRATAGY MATCHES

The next step is to define the actual received codes with 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.

8.3.5 USING CHARACTER CODES

Example Using Character Codes. The following example illustrates using the character codes.

- Direct Call

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

  Example:

  dial code 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 codes. Both dial codes should contain the extension number that was call forwarded to Stratagy. Part of one code will probably contain the available extension number you called from. The other dial code may or may not contain information pertaining to the CO line where the call came from.

  Example:

  dial codes 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 dial codes do not have the same "mask." If you do have one or more dial masks that are the same, you must modify them to be different or delete the extra ones. To test that dial code 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 which must all be different.

Example:

Using the following dial codes:
*****1eee**, **#02#sss#rrr#**, and **#03##rrr#**

the dial code masks would be:
***1, **#02###**, and **#03###**

which are all different.

Additional Dial Codes. Sometimes it is useful to have additional dial codes that match the same way as the actual dial codes except for the first character. For example you might want to add a second dial code 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 Dial Codes. The dial code strings are always sorted in like categories. When Stratagy receives a call, it uses a buffer to match against the defined dial code strings, and selects the first string that it matches.

Example 1:

dial code strings:
01rrr
02bbb

03eee

xxrrr

call Stratagy receives:

02100

dial code string Stratagy matches:

02bbb

Example 2:

dial code strings:

xxrrr

01rrr

02bbb

03eee

call Stratagy receives:

02100

dial code string Stratagy matches:

xxrrr (if on top, **xxrrr** always matched)

8.3.6 MODIFYING INTEGRATION DIAL CODES

To edit a dial code:

1. Use the arrow keys (↑ ↓), or **PgUp** and **PgDn**, to highlight the dial code parameter. Press **Enter**.
2. Modify the dial code using the line editor at the top of the screen.
3. Press **Enter** to save your changes. To escape without keeping any changes, press **Esc**.

To remove an integration dial code:

1. Use the arrow keys (↑ ↓), or **PgUp** and **PgDn**, to highlight the dial code parameter. Press **Enter**.
2. Press **Del** or the **spacebar** when the dial code parameter displays in the line editor at the top of the screen.

8.3.7 EXITING THE SYSTEM INTEGRATION PATTERNS SCREEN

When you have finished defining the System Integration Patterns, press **Esc** to return to the Other Switch Integrations Menu.

```
                    3. System Integration Patterns

Integration Timeout by 1/10: 10
Forward from Ring No Answer: Brr
Forward from Ring No Answer: Brrr
Forward from Ring No Answer: Brrrr
Forward from Ring No Answer: 91rr
Forward from Ring No Answer: 91rrr
Forward from Ring No Answer: 91rrrr
Direct call from extension : 92ee
Direct call from extension : 92eee
Direct call from extension : 92eeee
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
<available>                :
```

Figure 5-10
Sample System Integration Patterns Screen

PARAMETER	DESCRIPTION
INTEGRATION TIMEOUT BY 1/10	Amount of time Stratagy waits for integration information from the telephone system. In tenths of seconds. Possible values: 0 (disable integration), time in tenths of seconds Suggested value: 10 (10 10ths = 1 sec)
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 form 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#**

Table 5-4
Stratagy System Integration Patterns

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INSTALLATION SECTION

APPENDIX A
CHECKLISTS AND FORMS

TABLE OF CONTENTS

Appendix A — Checklists and Forms

FORMS

APPENDIX A
CHECKLISTS AND FORMS

1 INTRODUCTION

This appendix contains checklists and forms that simplify the installation process.

These are:

- Pre-installation and installation checklists.
- User ID customization forms.

Make copies of the checklists and forms as needed.

2 THE CHECKLISTS AND FORMS

The pre-installation and installation checklists — These checklists list items that need to be completed during pre-installation or installation.

Stratagy Pre-Installation Checklist

Stratagy Installation Checklist

The User ID customization forms — These forms simplify the customization process.

Users Form

Auto (Scheduling) Form

Notify Form

Greeting Scripts Form

STRATAGY PRE-INSTALLATION CHECKLIST

DONE ✔	ITEM	COMMENTS
☐	**KNOW THE REFERENCE DOCUMENTATION** (Installation section, Chapter 2, "Before You Install") ☐ ---------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.	
☐	**COMPLETED THE PRE-INSTALLATION SURVEY** (Installation section, Chapter 2, "Before You Install")	
☐	**DETERMINED STRATAGY'S CONFIGURATION AND INTEGRATION** (Installation section, Chapter 2, "Before You Install," and Chapter 5, "Configuring and Backing Up Stratagy") ☐ ---------1. Defined Stratagy system configuration options. ☐ ---------2. Defined system integration options.	
☐	**CUSTOMIZED USER ID MAILBOXES AND CALL PROCESSING** (completed the forms) (Programming section) ☐ ---------1. Determined the company greeting. ☐ ---------2. Determined the caller instructions. ☐ ---------3. Obtained the busy-hold music. (optional) ☐ ---------4. Determined the employee directory instructions. ☐ ---------5. Programmed the User IDs.	
☐	**SELECTED AND PREPARED THE HARDWARE SITES** (Installation section, Chapter 2, "Before You Install") ☐ ---------1. Stratagy system. ☐ ---------2. Remote or local system (required for Stratagy 4 and 6).	

STRATAGY INSTALLATION CHECKLIST

DONE ✔	ITEM	COMMENTS
☐	**INSTALLED THE HARDWARE** (Installation section, Chapter 3, "Installing the Hardware")	
☐	---------1. Inspected and unpacked the system.	
☐	---------2. Installed Stratagy Voice Boards (as appropriate).	
☐	---------3. Set up the Stratagy system PC hardware.	
☐	---------4. Configured your telephone system's voice mail system settings individually (as appropriate).	
☐	---------5. Connected line cords from the voice boards to the telephone system.	
☐	---------6. Verified Stratagy's basic functions.	
☐	---------7. Prepared (hardware and software) the remote or local system to access the Stratagy host system (required for Stratagy 4 and 6).	
☐	---------8. Accessed Stratagy directly, remotely, or locally.	
☐	**CONFIGURED STRATAGY USING THE STRATAGY CONFIGURATION UTILITY** (Installation section, Chapter 5, "Configuring and Backing Up Stratagy)	
☐	---------1. Defined Stratagy system configuration options.	
☐	---------2. Defined Stratagy integration options.	
	■ For a Toshiba telephone system, selected the appropriate system.	
	■ For a non-Toshiba telephone system, defined:	
	☐ ------- Telephone system dial codes.	
	☐ ------- Telephone system tone patterns.	
	☐ ------- System integration options.	
☐	---------3. Backed up Stratagy using the Stratagy Backup Utility.	
☐	**CUSTOMIZED USER ID MAILBOXES AND CALL PROCESSING** (entered the data from the forms completed during pre-installation) (Programming section)	
☐	---------1. Recorded the company greeting.	
☐	---------2. Recorded the caller instructions.	
☐	---------3. Recorded the busy-hold music. (optional)	
☐	---------4. Recorded the employee directory instructions.	
☐	---------5. Programmed the User IDs.	
☐	---------6. Backed up Stratagy using the Stratagy Backup Utility	

USERS FORM

Copy as needed.

User ID: _____ Comment _____ Security Code: _____
Extension: _____
Dir Name 1: _____ Dir Name 2: _____ Read Only:

Basic Options
Maximum Rings: _____ (default is 4)
Do Not Disturb: _____ Lock: _____
Screem Calls? _____ Lock: _____
Store Messages? _____ Max: _____ sec
Copy Messages To: _____
Message Volume: _____ Guests: _____
Curent Greeting: _____ Max: _____ sec
Busy Message? _____ Max: _____ sec
ID Call? _____ D/T? _____ Name/Ext? _____

Chains
Done: _____
RNA: _____
Busy: _____
Delay: _____

Groups
1: _____
2: _____
3: _____
4: _____

Menus
1: _____ 2: _____ 3: _____
4: _____ 5: _____ 6: _____
7: _____ 8: _____ 9: _____
0: _____

Does this User ID also have:

AUTO FORM: YES _____ NO _____

NOTIFY FORM: YES _____ NO _____

GREETING SCRIPTS FORM: YES _____ NO _____

AUTO (SCHEDULING) FORM

Copy as needed.

User ID ____________

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 #: ____

NOTIFY FORM

Copy as needed.

User ID ____________

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: ____

GREETING SCRIPTS FORM

Copy as needed.

User ID _____

Greeting 1	
Greeting 2	
Greeting 3	
Greeting 4	
Greeting 5	
Greeting 6	
Greeting 7	

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PROGRAMMING SECTION

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PROGRAMMING SECTION

CHAPTER 1
INTRODUCTION

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Chapter 1 — Introduction

CHAPTER 1
INTRODUCTION

1 PURPOSE

The Programming section of the *Stratagy Installation and Maintenance Manual* provides detailed instructions for operating, customizing, and administrating the Stratagy automated attendant and voice messaging systems.

This chapter provides an overview of the organization of the Programming section; a list of reference documentation that supports the system; the functions of the System Administrator; a list of system mnemonics and terms; and the use of notes, cautions, and warnings.

2 ORGANIZATION

This manual is organized in modular chapters for easy removal and replacement of updated materials. The chapters are as follows:

Chapter 1	Introduction
Chapter 2	How Stratagy Operates
Chapter 3	Accessing and Using Stratagy
Chapter 4	Customizing User ID Mailboxes
Chapter 5	Special Greeting User ID Mailboxes
Chapter 6	Token Programming Language
Chapter 7	Generating Reports
Chapter 8	Backup and Filecopy
Chapter 9	System Administrator's User ID
Appendix A	Forms
Appendix B	Customization Examples

3 REFERENCE DOCUMENTATION

Reference documentation for the Programming section consists of the remaining sections of the *Installation and Maintenance Manual* and additional Stratagy documentation.

3.1 SECTIONS OF THIS MANUAL

The *Installation and Maintenance Manual* consists of the following sections.

General Description: Reference document that provides an overview of the Stratagy systems. Describes their hardware and features. Available as a stand-alone document.

Installation: Designed for the installer, this section provides detailed step-by-step instructions for installing and configuring Stratagy systems.

Programming: Provides detailed instructions for operating, customizing, and administrating Stratagy systems (this section).

Fault Finding: Describes the procedures used to diagnose and correct faults.

Maintenance and Upgrades: Provides instructions on maintaining and upgrading Stratagy systems.

Operating Procedures: Consists of the *User Guide* reference document. Describes the telephone operating procedures for the telephone user. Incorporates the *Quick Reference Guide*, a concise guide for Stratagy users.

Technical Bulletins: Provide important updates to the Stratagy documentation.

3.2 ADDITIONAL REFERENCE DOCUMENTATION

In addition, the Stratagy systems are supported by the following complement of reference documentation.

Feature Description: A brief description of the features of the Stratagy systems.

User Guide: Describes the telephone operating procedures for the telephone user.

Quick Reference Guide: A concise guide for Stratagy users.

4 ABOUT THE SYSTEM ADMINISTRATOR

System Administrator functions may include:

- Initial setup (assisting the Installer with defining your company's configuration and customization requirements)
- Customizing User ID mailboxes
- Customizing special User ID mailboxes
- Generating reports
- Performing system shutdown and restart
- Backing up the system
- Using Stratagy's filecopy utility
- Using the system User ID mailbox

Your company will assign all or some of these functions to an employee who knows your phone system, organizational structure, and the needs of your customers and employees. The Technical Service Representative will perform the remaining functions.

5 SYSTEM MNEMONICS/TERMS

The following mnemonics and terms identify nomenclature used when operating, customizing, and administrating Stratagy.

BPS: Bits Per Second – Unit of measure that refers to the transmission speed (baud rate) of electronic signals. Used when describing modem operation.

Caller: Someone who calls into Stratagy. A caller often will obtain information, leave a message for someone, and/or provide information.

Called Party: The telephone user the caller reached. See "User".

Chains: Stratagy control structure that allows for more complex programming. Program chains to tell Stratagy what to do when one of three conditions apply: *Done* (if caller remains on the line after leaving a message or listening to an announcement), *RNA* (*Ring No Answer* – there is no answer at the extension), or *Busy* (the extension is busy).

CO: Central Office – Facility which houses switching equipment that provides telephone service (CO lines, Centrex lines, etc.) for the immediate geographical area.

DTMF: Dual tone Multi-frequency – Push-button tone dialing.

Groups: Stratagy control structure that allows for more complex programming. Groups control which User IDs a call may access. Each User ID mailbox user may 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: Stratagy control structure that allows for more complex programming. Program *menus* to define the destination a caller will be sent when he presses one of ten possible single-digit menu options while listening to the greeting of this mailbox. *Menus* can accommodate an unlimited number of special applications.

Modem: Modulator-Demodulator – Device used primarily for converting digital signals into quasi-analog signals for transmission, and reconverting upon reception.

PBX: Private Branch Exchange – Industry-standard term which refers to a telephone switch, usually on-premises, which serves an individual company, and is connected to a public telephone exchange through the CO.

Port: There are two types of ports: physical and logical. A physical port is an actual station circuit location; a logical port is the set of characteristics – features, station intercom number, etc. – assigned to the physical port. Logical ports are mobile; they can be moved from one physical port to another.

IVR: Interactive Voice Response – An application that will prompt the user for input (using a custom prompt), wait for the user to enter a DTMF response, which will be stored into a variable, and then use that information to access a database to formulate a response. Databases may be on the hard disk of the Stratagy system, accessed remotely over a network, or accessed through the serial ports of the Stratagy system, possibly connecting to a mainframe or other data server.

Once a response has been determined from the database, the Stratagy system may be programmed to play this data back to the caller in a number of different ways: as a date, time, monetary value (in dollars and cents), or simply as a number. The value may be combined with other custom-recorded prompts, so that the system could, for example, respond to a caller with the message "Your order for 6 items will be shipped on July 17, 1994." The number six and the date in this example would be provided by the database, while the phrases "Your order for" and "items will be shipped on" would be recordings that the System Administrator would make.

PC: Personal Computer.

Token Programming Language: Stratagy control structure that allows for more complex programming. Stratagy's programming language gives versatility to obtain additional features, such as fax on demand, message waiting light control, and confirming digits entered by a caller. A series of tokens instruct Stratagy what actions to perform.

User: A telephone user is someone who has access to one or more User IDs in the system by knowing their security codes. Once a user accesses his User ID, he can play back messages which have been left for him, delete those messages, send them to other User IDs, etc.

User ID/User ID Mailbox: Unique Stratagy record that provides call processing control – records messages from callers, provides information to callers, or controls the flow of a call.

6 USE OF NOTES, CAUTIONS, AND WARNINGS

Notes: Elaborate specific items, or reference other information.

Important Notes: Call attention to important instructions or other information.

Cautions: Advise you that the equipment could be damaged if the instructions are not followed closely.

Warnings: Alert you when the given tasks could cause the technician personal injury or death.

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PROGRAMMING SECTION

CHAPTER 2
HOW STRATAGY OPERATES

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Chapter 2 — How Stratagy Operates

FIGURE LIST

CHAPTER 2
HOW STRATAGY OPERATES

1 INTRODUCTION

Stratagy connects to standard analog extensions on your telephone system. To your telephone system, Stratagy looks like several ordinary telephones, not special digital or "fancy" telephone sets. As a result, Stratagy waits for its "telephone" or port to ring, with incoming calls directed to Stratagy by your telephone system. Until a call comes to Stratagy, your telephone system controls it. 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 (see Chapter 4 for details) determines what a caller hears and is able to do. 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:

- Unique User IDs
- Call processing control
- Types of User ID mailboxes
- How Stratagy processes movement between User IDS
- How Stratagy processes User ID mailboxes

2 UNIQUE 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.

Stratagy comes with several reserved User IDs. Only User ID 999 cannot be assigned to another User ID number:

User ID 0: operator
User ID 411: directory information
User ID 990: company greeting
User ID 991: instructions
User ID 994: fax tone detect
User ID 995: future delivery
User ID 996: guest defaults
User ID 997: defaults box
User ID 998: direct message
User ID 999: System Administrator User ID

In addition, the following User ID provide templates for fax functions:

User ID 7000 ~ 7014

3 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 allow for more complex control, enabling you to define virtually any call handling method.

Chains – *Chains* are how you tell Stratagy when one of three conditions apply: *Done, RNA (Ring No Answer)*, or *Busy*.

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 *Ring No Answer* chain instructs Stratagy where to send a caller when there is a *Ring No Answer* at this User ID's extension.

Busy – The *Busy* chain instructs Stratagy where to send a caller when this User ID's extension is *Busy*.

Groups – *Groups* control which User IDs a call may access. Each User ID mailbox user may 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 a caller will be sent when he presses one of ten possible single-digit menu options while listening to the greeting of this mailbox. *Menus* can accommodate an unlimited number of special applications.

Token Programming Language – Stratagy's programming language gives versatility to obtain other features, such as fax on demand, message

waiting light control, and confirming digits entered by a caller. A series of tokens instruct Stratagy what actions to perform.

4 TYPES OF USER ID 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 will 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 phone 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 real user or phone extension corresponds to this type of User ID.

Control – 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 phone number. If the phone number is 7 digits long, Stratagy assumes it is valid and the User ID passes control to a second User ID, which will make use of that phone number in some way (such as faxing a document to it). If the phone number is not 7 digits long, Stratagy might transfer to a third User ID, which would be an information box whose recording informs the caller that the phone 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.

5 HOW STRATAGY PROCESSES MOVEMENT BETWEEN 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 is described in Figure 2-1. Reference the text below for clarification.

The process described is the default setup in Stratagy. For example, User ID 990 (company greeting) and User ID 991 (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.

New Call – The process starts with an incoming call. Stratagy directs the call to the greeting User ID.

Company Greeting User ID – Default: User ID 990). The 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 greeting User ID.

- **NO** – Stratagy directs the call as per the greeting User ID 990's *Done* chain to the instruction User ID.

Instruction User ID – Default: User ID 991. The instruction User ID plays the caller instruction message, which is a menu of dialing choices ("To reach... press..."). 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 greeting User ID.

- **NO** – Stratagy looks at the value of the Stratagy System Configuration option *dtmf_gate*.

dtmf_gate – Stratagy determines if the Stratagy System Configuration option *dtmf_gate* is TRUE. For information on configuring *dtmf_gate*, see the Installation section.

- **YES** – Stratagy prompts the caller to say "yes" to the tone. If Stratagy detects any sound, Stratagy transfers the call to User ID 0 (operator). If not, Stratagy hangs up.

- **NO** – Stratagy transfers the call to User ID 0 (operator).

User ID 0 (Operator) – This is the end of the company instructions User ID's *Done* chain.

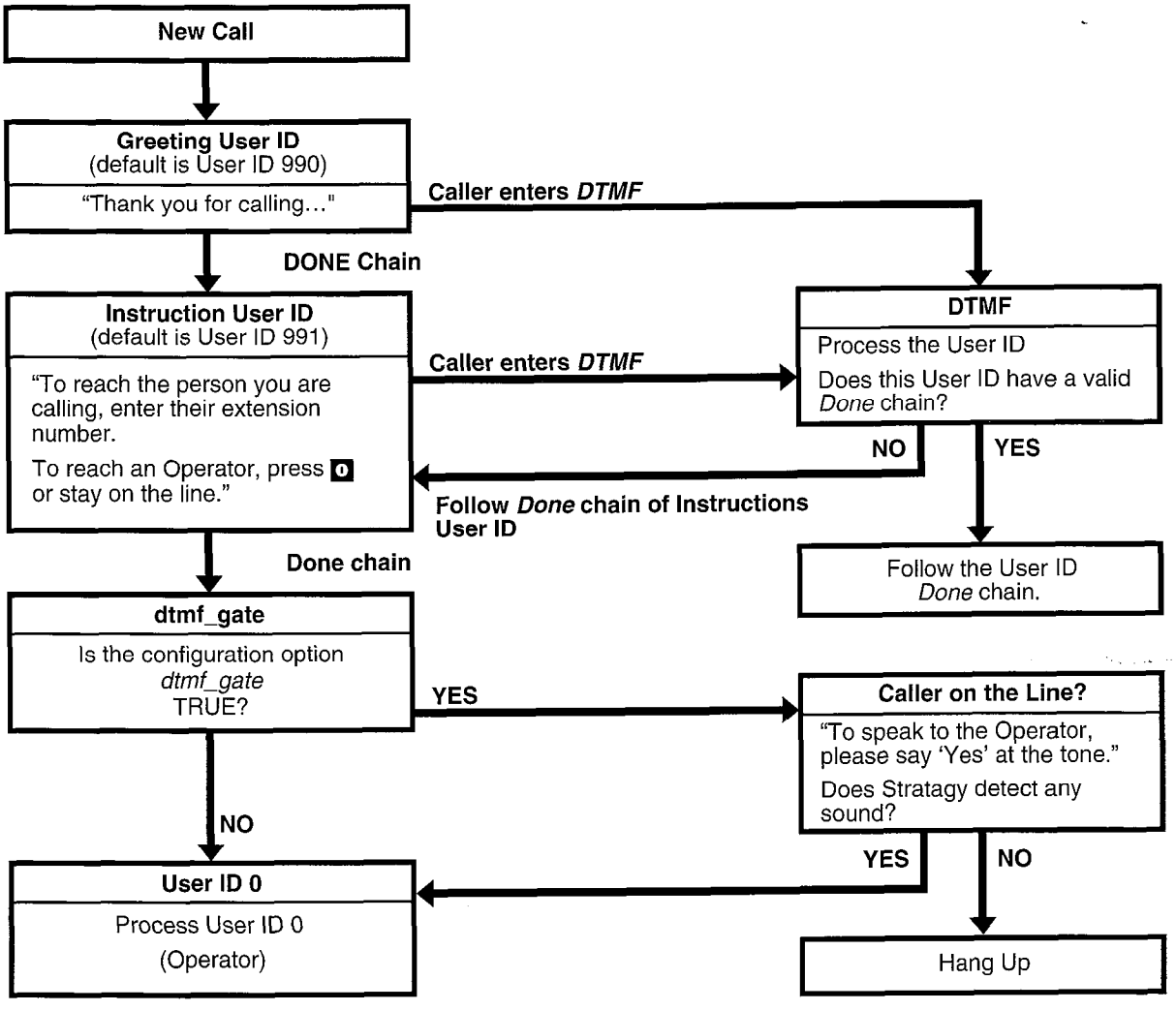

Figure 2-1
Movement Between User IDs

6 HOW STRATAGY PROCESSES USER ID MAILBOXES

Stratagy processes a User ID mailbox based on:

- User ID mailbox field settings
- whether an *Answer*, *Busy*, or *Ring No Answer* condition exists

The process is described in Figure 2-2. Reference the text below for clarification.

Start – Stratagy directs the call to this User ID.

Do Not Disturb – Stratagy determines whether the User ID mailbox field *Do Not Disturb* is ON.

- **YES** – Stratagy directs the call to the *Ring No Answer* greeting and proceeds with the *Ring No Answer* condition.
- **NO** – Stratagy determines whether *Call Screening* is ON.

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*.

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 *Ring No Answer* condition. If there is an error during processing, Stratagy follows the *Done* chain of the greeting User ID.
- **NO** – Stratagy places the call on transfer hold. Stratagy process the Token Programming Language, then proceeds to the *Answer*, *Busy*, or *Ring No Answer* condition, as appropriate.

Answer Condition – Stratagy processes the *Answer* condition as follows:

1. **ID Call** – Stratagy determines if *ID Call* is YES.
   - **YES** – Stratagy plays the user's recorded name and extension. If the recording does not exist, Stratagy plays a tone. Stratagy proceeds to *Call Screening*.
   - **NO** – Stratagy proceeds to *Call Screening*.
2. **Call Screening** – Stratagy determines if *Screen Calls* is ON.
   - **YES** – Stratagy plays the name the caller recorded.
   - **NO** – Stratagy connects the caller (step 4).
3. **Play Caller's Name. User Accepts or Rejects** – Stratagy plays "To accept... "
   - **ACCEPTS CALL** – User accepts call (presses **1**). Stratagy proceeds connect the caller (step 4).
   - **REJECTS CALL** – User rejects call (presses 2). Stratagy proceeds to the *Ring No Answer* condition.
4. **Connect the Caller** – Stratagy connects the caller and the user.

Busy Condition – Stratagy processes the *Busy* condition a follows:

1. **Busy Chain** – Stratagy determines if the *Busy* chain is defined.
   - **YES** – Stratagy follows this User ID's *Busy* chain.
   - **NO** – Stratagy proceeds to play the *Busy* message.
2. **Play Busy Message** – Stratagy determines if there is a custom busy message.
   - **YES** – Stratagy plays the user's custom *Busy* message.
   - **NO** – Stratagy plays the system *Busy* message.
3. **Caller Response**. Stratagy directs the call depending upon the caller's response.
   - **HOLD** – If 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.
4. **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*.
5. **Copy Messages 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.

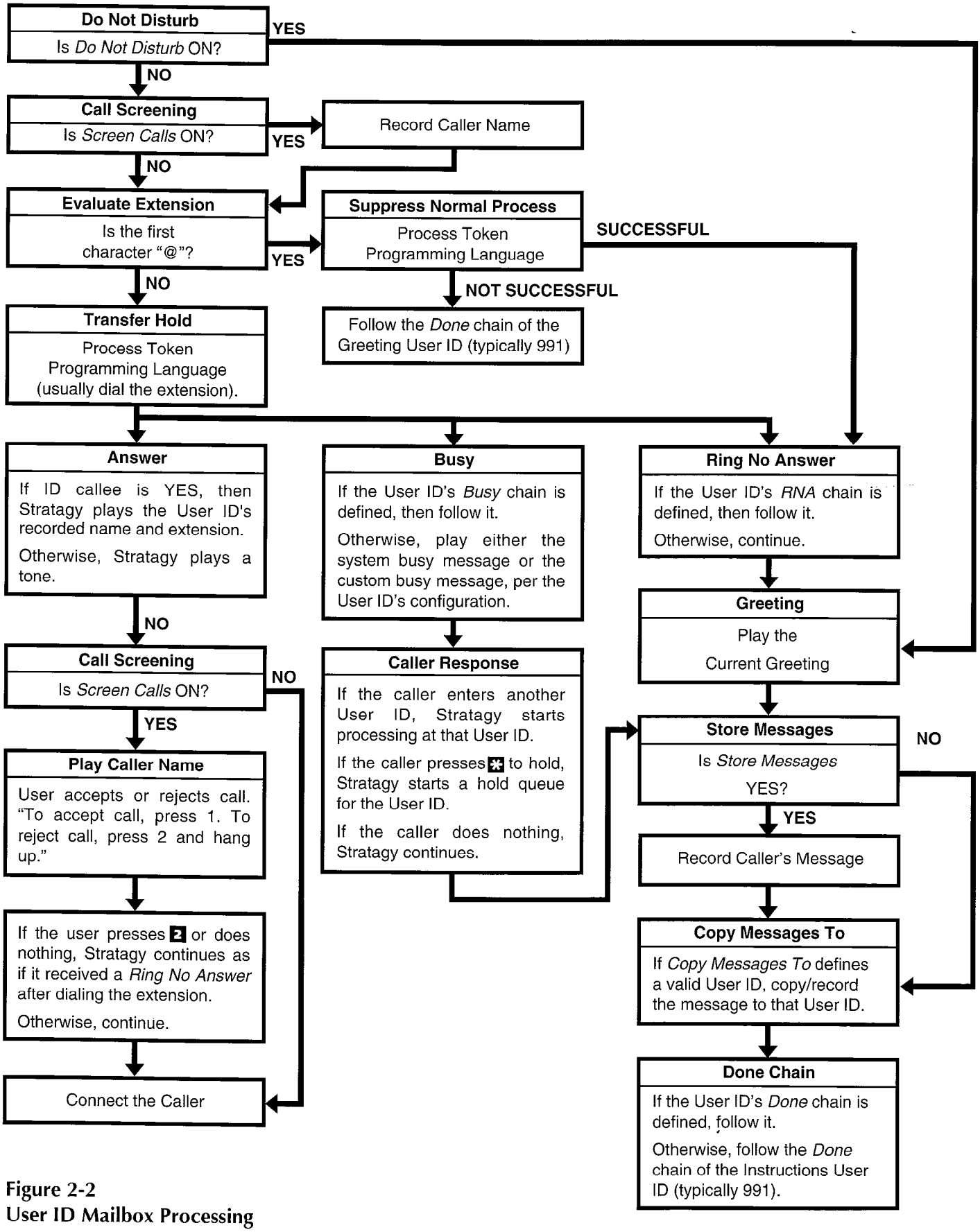

Figure 2-2
User ID Mailbox Processing

- **NO** – Stratagy proceeds to the User ID *Done* chain.

6. **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 User ID.
7. **Instructions User ID Done Chain** – Stratagy follows the *Done* chain of the instructions User ID (typically 991).

Ring No Answer Condition – Stratagy processes the *Ring No Answer* condition as follows:

1. **Ring No Answer Chain**. 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.
2. **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.
3. **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.
4. **Copy Messages 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.
5. **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 greeting User ID.
6. **Instructions User ID Done Chain**. Stratagy follows the *Done* chain of the instructions User ID (typically 991).

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PROGRAMMING SECTION

CHAPTER 3
ACCESSING AND USING STRATAGY

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Chapter 3 — Accessing and Using Stratagy

FIGURE LIST

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CHAPTER 3

ACCESSING AND USING STRATAGY

1 INTRODUCTION

When the Stratagy system powers up, the system 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 back up the Stratagy system.

To perform these functions, the Stratagy 4 and 6, which are not equipped with a monitor and keyboard, are accessible through local or remote access. The Stratagy 24 provides direct access through its monitor and keyboard, and remote access is an option.

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

- **System Startup** – How the Stratagy system starts up.
- **Accessing Stratagy** – Accessing Stratagy directly, locally, or remotely.
- **The Stratagy System** – Navigating through the menus and using online help.
- **Stratagy's Main Menu** – Using the Main Menu for customization and administration.
- **Setting System Data and Time** – Using Date/Time to set the system date and time.
- **System Shutdown** – Exiting the Stratagy program and accessing the Stratagy Configuration Utility.

2 SYSTEM STARTUP

When the Stratagy system powers up or when you exit the Stratagy Configuration Utility (and press any key), the system automatically displays the Main Menu on the Stratagy monitor (or would be displayed on the Stratagy monitor) and is operational.

3 ACCESSING STRATAGY

With the Stratagy 24, you can directly access Stratagy through the monitor and keyboard, or you can use remote access. Stratagy 4 and 6 are only accessible through local or remote access. Both local and remote access use Stratagy Remote software.

3.1 LOCAL ACCESS

Local access refers to accessing the Stratagy system directly via a cable connecting the Stratagy system with a laptop or PC. This section discusses:

- Connecting the cable
- Preparing the local system
- Using Stratagy locally

3.1.1 CONNECTING THE CABLE

Connect a null modem cable from COM1 or COM2 on the laptop or PC to the Stratagy system COM port. The default setting is COM2 for both the Stratagy 4 and 6. (Refer to Chapter 3, "Installing the Hardware," Figure 3-6, "Stratagy 4 and 6 Front and Back Panels".) The Stratagy 24, which has direct access with the monitor and keyboard, is not configured for local access.

On the laptop/PC, the COM ports are serial ports (9-pin or 25-pin male connectors). On the Stratagy system, COM2 has a 25-pin male connector. You may need to use an adapter with the null modem cable to connect the laptop/PC to the Stratagy system.

3.1.2 PREPARING THE LOCAL SYSTEM

Preparing a laptop/PC involves loading the Stratagy Remote software.

IMPORTANT NOTE:
Do not install the Stratagy Remote software on a system with a screen saver program; Local access may not work.

Load the Stratagy Remote software on the laptop/PC:

1. If you are not at the DOS prompt (C:\), exit to the DOS prompt.

   If you are running Windows, exit Windows. Do **not** use Windows' MS-DOS Prompt option.
2. Insert the disk that contains the Stratagy Remote software into the disk drive.
3. From the DOS prompt (C:\), enter:

   ```
   COPY A:REMOTE
   ```

   This copies the Stratagy Remote software to the laptop/PC's disk drive C:. (This example assumes that your floppy drive is disk drive A:)
4. When the copy is complete, remove the diskette.

3.1.3 USING STRATAGY LOCALLY

This section discusses how to use the Stratagy system from a local laptop/PC, including access and disconnect.

3.1.3.1 Accessing Stratagy Using a Local laptop or PC

To access Stratagy from a local laptop/PC, run the Stratagy Remote software.

1. To access the Stratagy Remote software, enter the following from the DOS prompt (C:\).

   NOTE:
   If you are running Windows, exit Windows; do ***not*** *use Windows' MS-DOS Prompt option.*

   If your local laptop uses COM1, enter:
   `REMOTE /n /f`
   If your local laptop uses COM2, enter:
   `REMOTE /2 /n /f`
2. When entered correctly, the screen displays the same information as on the Stratagy monitor (or would be displayed on the Stratagy monitor).

   NOTE:
   The screen may be blank because of the screen saver. If so, press the `spacebar`.

3.1.3.2 Using Stratagy Locally

Both the laptop/PC and the Stratagy system are active simultaneously. Use the laptop/PC as you would from the Stratagy monitor and keyboard. Note, however, that you cannot upload or download or files.

3.1.3.3 Exiting Local Access

To discontinue local access:

1. Be sure to leave the Stratagy system in the correct state.

   For example, if you want Stratagy up and running in call processing mode, leave Stratagy at the Main Menu. If you leave the Stratagy system at the Stratagy Configuration Utility Menu, etc, that is where it will be and call processing will **not** function.
2. Enter the following to disconnect from the Stratagy system:

   `Alt + X`

   The system prompts:

   OK to Exit (Y/N)

   Enter `Y` to exit the Stratagy system.

   Enter `N` to continue accessing the Stratagy system.
3. Disconnect the null modem cable.

3.2 REMOTE ACCESS

Remote access refers to accessing the Stratagy system via modem from a laptop or PC located at this or another site. This section discusses:

- Accessing Stratagy remotely
- Using Stratagy remotely

3.2.1 ACCESSING STRATAGY REMOTELY

To access Stratagy from the remote laptop or PC, run the Stratagy Remote software.

1. To access the Stratagy Remote software, enter the following from the DOS prompt (C:\).

   NOTE:
   If you are running Windows, exit Windows; do ***not*** *use Windows' MS-DOS Prompt option.*

   If your remote laptop or PC uses COM1, enter:

   `REMOTE`

   If your remote laptop or PC uses COM2, enter:

   `REMOTE /2`
2. Remote prompts:

   Phone number?

   Enter the exact digits the Stratagy Remote software must dial to access the Stratagy system modem.

   For example, if the remote modem is on the station side of a switch and the Stratagy system modem is also on the station side of a switch that is answered by Stratagy, you might use 9,17145555555,,,,,,102 where each comma is a 2-second delay.
3. Once connected, the screen clears. The Stratagy Remote software prompts:

   Password?

   Enter the password. (The password is CommLine, with the "C" and "L" uppercase.)
4. When entered correctly, the screen displays the same information as on the Stratagy monitor (or would be displayed on the Stratagy monitor).

   NOTE:
   The screen may be blank because of the screen saver. If so, press the `spacebar`.

3.2.2 USING STRATAGY REMOTELY

Both the remote and the Stratagy system are active simultaneously. Use the remote as you would from the Stratagy monitor and keyboard. Note, however, that you cannot download or upload files.

3.2.3 EXITING REMOTE ACCESS

To discontinue remote access:

1. Be sure to leave the Stratagy system in the correct state.

   For example, if you want Stratagy up and running in call processing mode, leave Stratagy at the Main Menu. If you leave the Stratagy system at the Stratagy Configuration Utility Menu, etc, that is where it will be and call processing will **not** function.

2. Enter the following to disconnect from the Stratagy system:

   `Alt + X`

   The system prompts:

   OK to Exit (Y/N)

   Enter **Y** to exit the Stratagy system.

   Enter **N** to continue accessing the Stratagy system.

4 USING THE STRATAGY SYSTEM

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.

IMPORTANT NOTE:
When you are finished customizing Stratagy or performing administrative functions, be sure to leave the system with the Main Menu displaying. The screen saver only works from the Main Menu.

4.1 NAVIGATING THE SYSTEM

Using the Stratagy menus, you can navigate the system to customize User ID mailboxes and perform administrative functions. For an illustration of how the menus are arranged, see Figure 3-1.

The Main Menu is the core of the program. The administrative functions of 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 detailed information about using the Main Menu see:

- "Using the Main Menu" in this chapter

For detailed information about customizing User ID mailboxes, see:

- Chapter 4, "Customizing User ID Mailboxes"
- Chapter 5, "Special Greeting User ID Mailboxes"

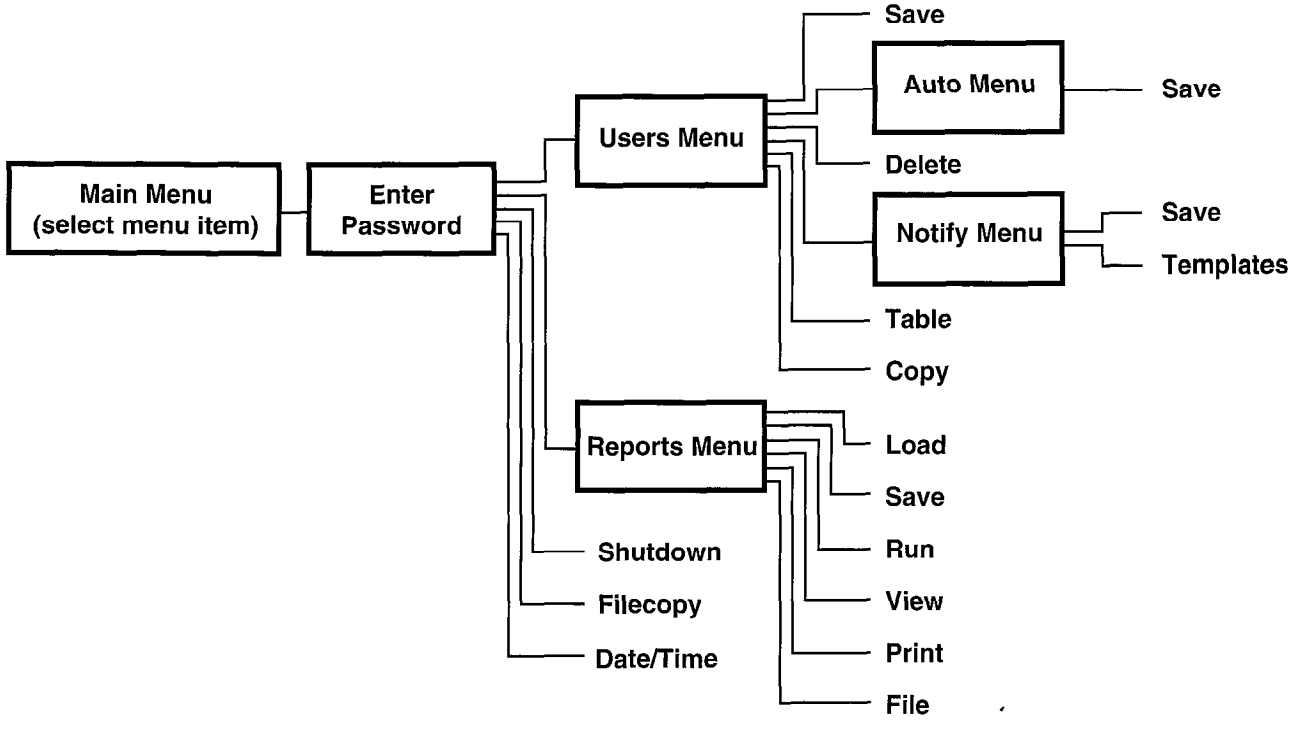

Figure 3-1
Navigating the Stratagy System

- Chapter 6, "Token Programming Language"
- Appendix B, "Customization Examples"

For detailed information about administrative functions, see:

- Chapter 7, "Generating Reports"
- Chapter 8, "Backup and Filecopy"

4.2 ONLINE HELP FUNCTION

Stratagy's online help function is context sensitive, i.e., content-specific help is available on an field-by-field basis.

Stratagy provides two types of online help – the help line and detailed help.

4.2.1 HELP LINE

The help line automatically displays at the bottom of the screen for the field that is active. Information about the current field displays.

4.2.2 DETAILED HELP

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

5 USING THE MAIN MENU

From the Main Menu, you can perform various functions of the Stratagy system. These include:

- Accessing the Users Menu (customizing User ID mailboxes)
- Generating reports
- Performing system shutdown
- Using the Filecopy Utility
- Setting system date and time

The Main Menu (Figure 3-2) consists of three parts:

Menu Bar – access options (select).

System Information – product identification and system activity statistics (display).

Port Activity Statistics – port activity of each installed port (display).

For a description of the Main Menu, including the definition of each field, see Table 3-1.

```
Users  Reports  Shutdown  Filecopy  Date/Time                          Main

 Stratagy 4 1.05/5.37          Usage:      0/68%      Time:  08/29/94  17:04:03
   Voice Processing            Users: 101          Started:  08/29/94  16:58:01
TAIS, Inc.Copyright 1994       Space: 31:46  94%  Shutdown:  08/30/94  01:30
     Strata DK 8               Calls: 1013            Faxes:
                               Notify Scan
                                  At 08/29/94 17:58
 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 3-2
Main Menu with Sample Data

MENU AREA	FIELD	DESCRIPTION
Menu Bar (select or display)		
Access Options	Users	Press `Alt` + `U` to access the Users Menu. See Chapter 4, "Customizing User ID Mailboxes."
	Reports	Press `Alt` + `R` to generate reports. See Chapter 7, "Generating Reports."
	Shutdown	Press `Alt` + `S` to shut down the Stratagy system. See "Performing System Shutdown" in this chapter.
	Filecopy	Press `Alt` + `F` to use the Filecopy Utility. See Chapter 8, "Backup and Filecopy."
	Date/Time	Press `Alt` + `D` to set the system date and time. See "Setting System Date and Time" in this chapter.
Menu Identification	Main	Menu title.
System Information (display)		
Product Identification		Stratagy voice processing model, software version, Rhetorex driver, and TAIS Inc. Toshiba telephone system name and model.
System Activity Statistics	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 disk space in time (hh:mm) and percent of total disk space (nn%).
	Calls:	Number of calls Stratagy answered since system started.
	Notify:	User ID mailbox the system is curently 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:	Fax status. *IDLE:* no activity *SND:* send *RCV:* receive *blank:* no fax connected

Table 3-1
Main Menu Fields

MENU AREA	FIELD	DESCRIPTION
Port Activity Statistics (display)		
System Activity Statistics (continued)	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 phone 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.
	User ID	Current User ID mailbox the port is accessing. If the port's status is *IDLE*, the last User ID mailbox accessed displays.
	Status	Functional system is performing on the port. Includes: *IDLE* *BUSY* *EXECUTE* *GREETING* *PCPM* *CHAIN* *RECORDING* *MAIL* *DIAL* *ANSWER* *RING* *MENU: #*
	Calls	Number of calls made or answered by the port.
	Last	Last time (hh:mm) the port started activity. *NEVER* displays if the port was never active.

Table 3-1
Main Menu Fields (continued)

6 SETTING SYSTEM DATE AND TIME

To set the system date and time:

1. From the Main Menu, select Date/Time. Press:
   Alt + D
2. Stratagy prompts:
   Password?
   Enter the password. (The default password is Stratagy, with the first letter uppercase.)
3. The current date and time settings display, with the date field highlighted.
   Use the arrow keys (↑ ↓) to move between the date and time fields. Or press **Enter** to move to the next field.
   Enter the new date and time settings. The date format is:
   mm/dd/yyyy
   The time format (24-hour clock) is:
   hh:mm:ss
   When finished, return to the Main Menu.

7 PERFORMING SYSTEM SHUTDOWN

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

- Turning power off to perform hardware maintenance
- Backing up or restoring Stratagy using the Stratagy Backup Utility
- Upgrading the system
- Configuring Stratagy using the Stratagy Configuration Utility
- Moving the system to another location

IMPORTANT NOTE:
Never shutdown Stratagy by turning off the computer's power. Doing so may corrupt the system files that are in use. Perform the following FIRST.

To exit the system:

1. From the Main Menu, select Shutdown. Press:
   Alt + S
2. Stratagy prompts:
   Password?
   Enter the password. (The default password is Stratagy, with the first letter uppercase.)
3. Stratagy prompts:
   Shutdown the entire system? [**N Y**]
   N: Do not shutdown the system. Return to the Main Menu.
   Y: Shutdown the system.
4. Stratagy reconfirms:
   Really SHUTDOWN the entire system? [**N Y**]
   N: Do not shutdown the system. Return to the Main Menu.
   Y: Shutdown the system.
5. Stratagy starts shutdown. If any ports are in use, Stratagy delays shutting down the system for 60 seconds. At that time, Stratagy completes shutdown, cutting off any callers or users that are still active.
   When shutdown is complete, the system displays the Stratagy Configuration Utility.
6. Stratagy system power may be turned off if desired.

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PROGRAMMING SECTION

CHAPTER 4
CUSTOMIZING USER ID MAILBOXES

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Chapter 4 — Customizing User ID Mailboxes

FIGURE LIST

TABLE LIST

CHAPTER 4

CUSTOMIZING USER ID MAILBOXES

1 INTRODUCTION

This section provides detailed information about customizing User ID mailboxes. More specifically, this chapter discusses defining User IDs using the following menus:

Users Menu – The Users Menu enables 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.

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.

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.

In addition to the programming capabilities provided by the Users, Auto, and Notify Menus, Stratagy provides a Token Programming Language which enables you to obtain additional features. These include fax on demand and message waiting light control. For details, see Chapter 6, "Token Programming Language."

Stratagy provides reserved User ID mailboxes that have common features pre-programmed, including future delivery, guest defaults, and fax tone detect. In addition, User IDs 7000 ~ 7014 provide pre-programmed fax features that can be copied and used for defining User ID records. Notify contains templates (e.g., message waiting light control and pagers) you can use for defining User ID Notify records.

For sample customized User ID mailboxes, see Appendix B. If you have questions about customizing User ID mailboxes, please contact Toshiba Technical Support.

2 DEFINING USER ID FIELD VALUES

When in the Users, Auto, and Notify Menus, you can identify the field you are in by the location of the solid color edit block on the screen next to the field name.

To change the value of the field, type the information you want in the field and press **Enter** or, for some fields, press the **spacebar** to toggle the value.

To move between fields, use **tab** to move the edit block to the next field. Use **Enter** or the arrow keys (↑ ↓) to move between fields. Press **Home** to move the edit block to the first field.

Online help is available on a field-by-field basis. For details, see "Using the Stratagy System" in Chapter 3.

3 USING THE USERS MENU

The Users Menu is the point from which every User ID is created, modified, saved, and deleted. Features available through the Users Menu include:

- Company directory entries
- Ring no answer
- Do not disturb
- Call screening
- Message storage
- Control structures (chains, groups, and menus)
- User statistics

Once you have defined and saved a User ID, you can further customize it using the Auto and Notify Menus.

This section discusses:

- Accessing and exiting the Users Menu
- The Users Menu
- Defining a User ID record
- Deleting a User ID record
- Listing User ID records

3.1 ACCESSING AND EXITING THE USERS MENU

NOTE:
For information about the Main Menu, see Chapter 3, "Starting, Using and Exiting the Stratagy System".

3.1.1 ACCESSING THE USERS MENU

Access the Users Menu from the Main Menu. Enter:

Alt + U

Enter the password (the default password is Stratagy, with the first letter uppercase)

NOTE:
The password does not display as you type. If you enter it incorrectly, you must select the Users Menu again.

3.1.2 EXITING THE USERS MENU

When you have finished defining the Users records, press **Esc** to return to the Main Menu.

IMPORTANT NOTE:
If you want to save your modifications to the current User ID record, be sure to press Alt + S to save before pressing Esc.

3.2 THE USERS MENU

The Users Menu (Figure 4-1) consists of five parts:

Menu Bar: access and viewing options (select).

Mailbox Identification: minimum information Stratagy requires for a standard User ID which transfers calls and takes messages (modify).

User ID Basic Options: ring no answer, do not disturb, call screening, and message information for this User ID mailbox (modify).

User ID Control Options: chain, group, and menu information for this User ID mailbox (modify).

User ID Statistics: statistics for this User ID mailbox. These can be used to generate reports (display).

For a description of the Users Menu, including the definition of each field, see Table 4-1. In addition, when using the menu, press **F1** to display detailed help for the current field.

3.3 DEFINING A USER ID RECORD

Defining a User ID record involves one of the following:

- Creating a User ID record
- Modifying an existing User ID record
- Copying an existing User ID record

3.3.1 CREATING A USER ID RECORD

To create a User ID mailbox:

1. Enter a unique number in the *User ID* field. Press **Enter**.

   Stratagy initializes the remaining fields (including the Notify and Auto records) with the default values specified in User ID 997.
2. Define the User fields (Mailbox Identification, User ID Basic Options, User ID Control Options). Use **Enter** or the arrow keys (↑ ↓) to move between fields.

NOTE:
To display detailed help for the current field, press **F1**.

3. Press **Alt + S** to save the record. The *Created* field changes from NEVER to the current date and time.
4. As appropriate, continue defining the User ID mailbox using the Auto Menu and Notify Menu.

3.3.2 MODIFYING AN EXISTING USER ID RECORD

To modify an existing User ID mailbox:

1. In the *User ID* field, enter the User ID of the User ID mailbox record you want to modify. Press **Enter**.

   Stratagy automatically loads the User ID mailbox record. If the User ID does not exist, Stratagy assumes that you are creating a new User ID mailbox record (see "Creating a User ID Record" above).

   To determine whether a particular User ID has already been created, look at the *Created* field in the User ID Statistics area.
2. Define the User fields (Mailbox Identification, User ID Basic Options, User ID Control Options). Use **Enter** or the arrow keys (↑ ↓) to move between fields.

NOTE:
To display detailed help for the current field, press **F1**.

3. Press **Alt** + **S** to save the record.
4. As appropriate, continue defining the User ID mailbox using the Auto Menu and Notify Menu.

3.3.3 COPYING AN EXISTING USER ID RECORD

To copy an existing User ID mailbox to use as a template to create new User ID mailboxes:

1. In the *User ID* field, enter the User ID of the User ID mailbox record you want to modify. Press **Enter**.

   Stratagy automatically loads the User ID mailbox record.

2. To copy the existing User ID mailbox, select Copy. Enter:

   Alt + **C**

3. Stratagy prompts for the User ID range to copy to:

   First User ID:

   Last User ID:

   Enter the range. Press **Enter**.

4. Stratagy creates the specified range of User ID mailboxes using the existing User ID mailbox as a template.
5. Customize the first User ID mailbox copied:

   a. Define the User fields (Mailbox Identification, User ID Basic Options, User ID Control Options). Use **Enter** or the arrow keys (↑↓) to move between fields.

   b. Press **Alt** + **S** to save the record.

   c. As appropriate, continue defining the User ID mailbox using the Auto Menu and Notify Menu.

6. Repeat the process for each of the User ID mailboxes copied.

3.4 DELETING A USER ID RECORD

To delete an existing User ID mailbox, including all messages and recordings:

1. In the *User ID* field, enter the User ID of the User ID mailbox record you want to delete. Press **Enter**.
2. Verify that this is the User ID mailbox you want to delete.
3. Press **Alt** + **D** to delete this User ID mailbox record.

IMPORTANT NOTE:
Once deleted, there is no way to retrieve the User ID mailbox record.

3.5 LISTING THE USER ID RECORDS

To list the existing User ID mailboxes, select Table. Enter:

Alt + **T**

The User IDs list in numerical order, along with the *Comment, Extension, Name (Directory Name 1 and Directory Name 2)*, and Messages (*Messages Current*) fields.

To access a specific User ID, use the arrow keys (↑ ↓) to highlight the ID and press **Enter**. The Users Menu displays with this User ID's information.

To return to the Users Menu, press **Esc**.

For a sample User ID Table listing, see Figure 4-2. For field definitions, see the Users Menu fields (Table 4-1).

```
Save Auto Delete Notify Table Copy      Esc/EXIT PgDn/NEXT PgUp/PREV | Users
---------------------------------------------------------------------------
   User ID:  203        Comment:                     Security Code:
 Extension:  203
 Dir Name 1: JOHNSON               Dir Name 2: KEN              Read-only: OFF
---------------------------------------------------------------------------
Basic Options                         | Chains                    Groups
    Maximum Rings: 0 (default is 4)   |  Done:                     1: 1
   Do Not Disturb: OFF   Lock: OFF    |   RNA:                     2: 7
     Screem Calls? OFF   Lock: OFF    |  Busy:                     3: 0
   Store Messages? YES   Max: 180 sec | Delay:          0          4: 0
 Copy Messages To:                    | Menus
   Message Volume: 0     Guests: 1    | 1:             2:          3:
  Curent Greeting: 1     Max: 45 sec  | 4:             5:          6:
     Busy Message? SYS   Max: 45 sec  | 7:             8:          9:
ID Call? NO   D/T? YES   Name/Ext? YES|                0:
---------------------------------------------------------------------------
 Created: 08/04/94 23:02  Conn Secs:  975 Statistics Started: 08/04/94 23:02
   Saved: 08/11/94 23:02  User Secs: 4376 Calls:     153 Last: 08/26/94 10:41
Messages                              Transfers:       6 Last: 08/19/94 18:47
   Current:   10,   0 new (  583 sec)    Logins:      62 Last: 08/26/94 16:12
   Maximum:   36  Total:     70        Notifies:      87 Last: 08/26/94 17:29
```

Figure 4-1
Users Menu with Sample Data

```
                                   Esc/EXIT Enter/SELECT          | Table
---------------------------------------------------------------------------
   User ID   Comment         Extension Name                  Messages

   225                       225       Michaels Sara Beth    1 (   25 sec)
   226                       226       Garcia Maria          2 (  601 sec)
   227                       227       Scott Donna           3 (  153 sec)
   228                       228       Smith Joe             0 (    0 sec)
   229                       229       Chow Bill             1 (   65 sec)
   230                       230       Washington JoAnn      7 (  320 sec)
   231                       231       Thomas Steve          0 (    0 sec)
   411      DIRECTORY IN                                     0 (    0 sec)
   990      GREETING                                         0 (    0 sec)
   991      INSTRUCTIONS                                     0 (    0 sec)
   994      Fax Tone Det                                     0 (    0 sec)
   995      Future Deliv                                     0 (    0 sec)
   996      Guest Defaul                                     0 (    0 sec)
   997      Defaults Box                                     0 (    0 sec)
   998      Direct Messa                                     0 (    0 sec)
   999      SYSTEM ADMIN                                     0 (    0 sec)
```

Figure 4-2
Sample User ID Table Listing

MENU AREA	FIELD	DESCRIPTION
Menu Bar (select)		
Access Options	Save	Press `Alt` + `S` to save the current User ID record.
	Auto	Press `Alt` + `A` to access the Auto Menu.
	Delete	Press `Alt` + `D` to delete the curent User ID mailbox, including associated messages and greetings.
	Notify	Press `Alt` + `N` to access the Notify Menu.
	Table	Press `Alt` + `T` to list all User ID mailboxes.
Exit Options	Esc/EXIT	Press `Esc` to exit the Users Menu and return to the Main Menu.
Viewing Options	PgDn/NEXT	Press `PgDn` to view the next User ID mailbox.
	PgUp/PREV	Press `PgUp` to view the previous User ID mailbox.
Menu Identification	Users	Menu title.
Mailbox Identification (modify)		
	User ID:	User ID mailbox number. Usually associated with a phone extension (for simplicity). Employees without a phone extension can have a mailbox from which they can send and receive messages. Mailboxes can be used for special funtions 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.).

STRGY-PROG.t04-01.a

Table 4-1
Users Menu Fields

MENU AREA	FIELD	DESCRIPTION
Mailbox Identification (continued) (modify)		
	Security Code:	Password that permits the user access to this User ID mailbox. The security code insures 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 depends on the security code for User ID 997. If blank, the initial security code for all User IDs is the same number as the User ID (e.g., for User ID 234, the security code is 234). Otherwise, it is the security code for User ID 997 (default is 997). 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.
	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.

STRGY-PROG.t04-01.b

Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Mailbox Identification (continued) (modify)		
	Dir Name 1:	The first of two names Stratagy will search for when a caller uses the 411 company directory. For most companies, this is the User ID owner's first name. For example, if the name of the person corresponding to this User ID is Donna, the caller would enter digits corresponding to these letters on his touch tone phone (i.e., 3 6 6 6 2), and Stratagy would play the "User ID's name and extension" if it has been recorded or the system default User ID. It is important that each user record his name and extension. For User IDs that do not appear in the 411 directory, leave this field blank. Stratagy simply plays the name and extension recording of all User IDs that match a caller's entry for 411. Therefore, 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. The number of letters used for the directory is defined in the system configuration. The maximum number of letters configurable is 16; Stratagy's default is 3. Spaces are ignored. Non-alphabetical characters are not allowed.
	Dir Name 2:	The second of two names Stratagy may search for when a caller uses the 411 company directory. 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 411 directory, leave this field blank. The number of letters used for the directory is defined in the system configuration. The maximum number of letters configurable is 16; Stratagy's default is 3. Spaces are ignored. Non-alphabetical characters are not allowed.
	Read-only:	(display only) Whether this User ID is modifiable. *YES:* You cannot modify this User ID. You can use the User ID as a template – you can copy it and modify the copy. *NO:* You can modify this User ID.

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Basic Options (modify)		
Ring No Answer (RNA)	Maximum Rings:	When transferring a call to the User ID, the number of rings Stratagy will wait before determining a *Ring No Answer* status. This option only works when Stratagy is controlling the call transfer during a monitored, or supervised, transfer. For example, if the phone is not answered within 4 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
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 Do Not Disturb:	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 will not be 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)

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Basic Options (continued) (modify)		
Call Screening	Screen Calls?	Whether Stratagy asks the caller to record his name before attempting a transfer to the user's extension, allowing a user to accept or decline the call. If the user rejects the call, Stratagy follows the procedures used for the *Ring No Answer* chain. If *Call Screening Lock* is set to OFF, the user can toggle this feature on or off. *ON:* *Call Screening* is on. *OFF:* *Call Screening* is off. Possible values: ON, OFF Default: OFF (*Call Screening* is off)
	Lock Call Screening	Locks the current *Screen Calls* setting. The current *Screen Calls* setting cannot be changed by the user through the telephone. *ON:* User will not be 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)
Messages	Store Messages?	Whether Stratagy allows 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 mailbox may store messages. *NO:* This 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)
	Store Messages Max	Maximum message length in seconds a caller is allowed when leaving a message. Possible values: 0 (unlimited), 1 ~ 999 (seconds) Default: 180 (3 minutes)

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Basic Options (continued) (modify)		
Messages (continued)	Copy Messages To:	User ID mailbox to which to send a copy of this mailbox's messages. 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. Possible values: -8 (softest) ~ 8 (loudest) Default: 0
	Guests:	Number of guest User IDs this User ID can create. *1 ~ 99:* user can create the number of guest User IDs originally configured plus this many additional guest User IDs *0:* user can create as many guest User IDs as originally configured. *-1:* user cannot use the guest User ID feature Possible values: -1 (no guest User IDs), 0 (no additional guest User IDs), 1 ~ 99 (additional guest User IDs) Default: -1 (cannot use guest User IDs)
	Current Greeting:	Which of eight User ID greetings will play. 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 and extension]." Possible values: 0, 1 ~ 7 Default: 0 (system greeting)

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Basic Options (continued) (modify)		
Messages (continued)	Current Greeting Max	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 greetings), 1 ~ 999 Default: 45 (seconds)
	Busy Messages?	Greeting caller receives when the extension is busy. *SYS:* System default busy message. 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 will be given the same options. *CUS*: Custom busy message. Possible values: CUS, SYS Default: SYS
	Busy Message Max	Maximum greeting length (seconds) for the custom busy message recorded by the user. Whether the user can change the busy greeting. Possible values: 0 (user cannot change greeting), 1 ~ 999 Default: 45 (seconds)
	ID Call?	Identify callee. Play the name and extension associated with the User ID mailbox the caller dialed. *YES:* Stratagy plays the name and extension 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
	D/T?	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)

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Basic Options (continued) (modify)		
Messages (continued)	Name/Ext?	Whether the user may record his name and extension for playback/identification to a caller. *YES:* Plays user's recording of name and extension. *NO:* Plays User ID number. Possible values: YES, NO Default: YES
User ID Control Options (modify)		
Chains		Chains are how we tell Stratagy what to do with a caller when one of three specific conditions apply: Done, RNA (Ring No Answer), Busy.
	Done:	Instructs Stratagy where to send a caller who remains on the line after leaving a message or after listening to an announcement only mailbox. *blank:* Stratagy uses the *Done* chain of the initial greeting User ID (generally 990), which normally points to User ID 991 (caller instructions User ID). Possible values: blank, another User ID, special programming language Default: blank (*Done* chain of the initial greeting User ID)
	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, special programming language Default: blank (plays the current greeting for the mailbox)
	Busy:	Instructs Stratagy where to send a caller when this User ID's extension is *Busy*. Possible values: blank, another User ID, special programming language Default: blank (plays the busy greeting for the mailbox and takes a message)
	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: tenths of seconds (a value of 10 equals 1 sec) Default: 0 (no additional delay)

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Control Options (continued) (modify)		
Groups		Groups control which User IDs a call may access. Each User ID mailbox user may 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.
	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.)
	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.)
	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.)
	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.)

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Control Options (continued) (modify)		
Menus		*Menus* define the destination a caller will be sent when he presses one of the ten possible menu options while listening to the greeting of this mailbox. *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), he would be transferred to User ID mailbox 222. If the caller selects 2 (Product Information), he would be transferred to User ID mailbox 350. If the caller selects 3, he would be transferred to User ID mailbox 516 (Service). If the caller selects 0 (Operator), he will be transferred to the customer service secretary at extension 240. If the caller presses a menu digit that does not contain a User ID, he would be transferred to that User ID (e.g., if the caller presses 7, he would be transferred to User ID 7).
User ID Statistics (Statistics for this User ID mailbox. Display only.)		
	Created:	Date (mm/dd/yy) and time (hh:mm) this User ID mailbox was originally created. Time is in military format (24-hour clock).
	Saved:	Date (mm/dd/yy) and time (hh:mm) this User ID mailbox was last updated. Time is in military format (24-hour clock).
	Conn Secs:	Number of seconds callers have been connected to this mailbox since it was created.

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Table 4-1
Users Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
User ID Statistics (continued) (Statistics for this User ID mailbox. Display.)		
	User Secs:	Number of seconds users have been connected to this mailbox since it was created.
	Messages Current:	Number of messages currently stored and number of seconds for playback of these stored messages.
	Messages New:	Number of new (not yet played) messages.
	Messages Maximum:	Maximum number of messages ever stored at the same time.
	Messages Total:	Number of messages stored since created.
	Statistics Started:	Last time statistics were reset. Reset Statistics is an option after running a System Report.
	Calls:	Number of times mailbox accessed by a caller since statistics were last reset.
	Calls Last:	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.
	Transfers Last:	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.
	Login Last:	Last time (date and time) this mailbox user accessed this 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 this mailbox user was notified of new messages.
	Notifies Last:	Last time (date and time) this mailbox user was notified of new messages. Time is in military format (24-hour clock).

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Table 4-1
Users Menu Fields (continued)

4 USING THE AUTO (SCHEDULING) MENU

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 will answer your company's phone 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 will change the:

- *Do Not Disturb* setting
- *Call Screening* setting
- *Greeting* number
- Destination defined in the *Extension* field
- Number of rings before taking a message for this extension

4.1 ACCESSING AND EXITING THE AUTO MENU

4.1.1 ACCESSING THE AUTO MENU

Access the Auto Menu through the Users Menu. While viewing a specific User ID mailbox record, select Auto by entering:

Alt +A

4.1.2 EXITING THE AUTO MENU

When you have finished defining the Auto records, press **Esc** to return to the Users Menu.

IMPORTANT NOTE:
If you want to save your modifications to the current Auto record, be sure to press Alt + S to save before pressing Esc.

4.2 THE AUTO MENU

The Auto Menu (Figure 4-3) consists of four sections:

Menu Bar: access and viewing options (select).

Mailbox Identification: overlay of information about this User ID mailbox from the Users Menu (display).

Auto Record Summary: ten one-line descriptions of existing schedules (display).

Auto Record Options: Auto fields for the record highlighted in the Auto Record Summary (modify).

For a description of the Auto Menu, including the definition of each field, see Table 4-2. In addition, when using the menu, press **F1** to display detailed help for the current field.

4.3 HOW STRATAGY USES AUTO RECORDS

The key to understanding how Stratagy uses Auto records is:

> Stratagy performs the specified changes at a given date and time.

Stratagy waits for the right date, time, and day, and then makes the defined changes. Once Stratagy makes changes, it does not check if the changes remain.

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.

4.4 DEFINING AN AUTO RECORD

Defining an Auto record involves one of the following:

- Creating an Auto record
- Modifying an existing Auto record

4.4.1 CREATING AN AUTO RECORD

To create an Auto record:

1. In the Auto Record Summary area, use **PgDn** and **PgUp** to highlight the first *<Disabled>* description line.
2. Press the **spacebar** to toggle the Auto Record Options *Enable* field to YES.
3. Define the Auto Record Options fields.

   NOTE:
   To display detailed help for the current field, press **F1**.

4. Press **Alt + S** to save the record. Stratagy automatically transfers the data to the first available description line in the Auto Record Summary.

4.4.2 MODIFYING AN EXISTING AUTO RECORD

To modify an existing Auto record:

1. In the Auto Record Summary area, use **PgDn** and **PgUp** to highlight the record you want to define.
2. If appropriate, press the **spacebar** to toggle the Auto Record Options *Enable* field to YES.
3. Define the Auto Record Options fields.

NOTE:
To display detailed help for the current field, press **F1**.

4. Press **Alt** + **S** to save the record. Stratagy automatically transfers the data to the appropriate description line in the Auto Record Summary.

4.5 DISABLING AN AUTO RECORD

To disable an existing Auto Schedule Record:

1. Use **PgDn** and **PgUp** to highlight the appropriate *<Enabled>* description line in the Auto Record Summary.
2. Press the **spacebar** to toggle the Auto Record Options *Enable* field to *NO*.
3. Press **Alt** + **S** to save the record. Stratagy automatically disables the appropriate description line in the Auto Record Summary.

```
Save                                    Esc/EXIT PgDn/NEXT PgUp/PREV | Auto

  User ID:       990     Comment: Company Greeting     Security Code:
Extension:
Directory Name 1:                Directory Name 2:

 NEXT: 08/30/94 09:00; RNA -> 0 DND -> ON CS -> OFF GRT -> 1
 NEXT: 08/30/94 17:00; RNA -> 0 DND -> ON CS -> OFF GRT -> 2
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>

Enabled      Change On: 08/20/1994 At 09:00        Restrict To: M T W T F S S
  YES        And Every:  0 month(s) 1 day(s)                     Y Y Y Y Y N N
                         0 hour(s)  0 minute(s)   Next Change: 08/30/94 09:00
Extension:
Rings: 0      Do Not Disturb: ON        Call Screening: OFF    Greeting #: 1
```

Figure 4-3
Auto Menu with Sample Data

MENU AREA	FIELD	DESCRIPTION
Menu Bar (select)		
Access Options	Save	Press `Alt` + `S` to save the current Auto record.
Exit Option	Esc/EXIT	Press `Esc` to exit the Auto Menu and return to the Users Menu.
Viewing Options	PgDn/NEXT	Press `PgDn` to view the next Auto record for this User ID.
	PgUp/PREV	Press `PgUp` to view the previous Auto record for this User ID.
Menu Identification	Auto	Menu title.
Mailbox Identification (display; defined in the Users Menu)		
	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 this 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 will search for when a caller uses the 411 company directory.
	Directory Name 2:	The second of two names Stratagy may search for when a caller uses the 411 company directory.
Auto Record Summary (display; one line descriptions of existing schedules)		
Auto Record Options (modify)		
Auto Scheduling Enabled	Enabled	Enable or disable the current Auto record. *YES:* Enable the record. Stratagy carries out the instructions defined by the record. ENABLED displays. *NO:* Disable the current Auto Schedule record. NO displays. Possible values: YES, NO Default: NO (displayed)

STRGY-PROG.t04-02.a

Table 4-2
Auto (Scheduling) Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Auto Record Options (continued) (modify)		
First Change	Change On:	Date (mm/dd/yyyy) of first scheduled change.
	Change At:	Time (hh:mm) of first scheduled change. Military format (24-hour clock). To guarantee that Stratagy will program 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 this change will re-occur 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 this change will re-occur 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 this change will re-occur. With every 12 hours, the change occurs twice daily. Possible values: 0 ~ 23 Default: 0 (hours)
	And Every Minute(s):	Number of minutes before this change will re-occur. With every 30 minutes, the change occurs every half hour. Possible values: 0 ~ 59 Default: 0 (minutes)

STRGY-PROG.t04-02.b

Table 4-2
Auto (Scheduling) Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Auto Record Options (continued) (modify)		
Days of the Week	Restricted To:	Days of the week to which the change is restricted. *Y:* Yes, the change occurs on this day of the week. *N:* No, the change does not occur on this day of the week. *NOTE:* *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)	Date and time the next change will occur. Possible values: mm/dd/yyyy hh:mm: date and time of next change. Time is in military format (24-hour clock) Default: NEVER (Auto record is disabled)
User ID Information	Extension	New extension Stratagy rings when this 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 than during the day. Valid entries: include User ID mailbox, phone extension, special programming language Default: Users Menu *Extension* value for this User ID
	Rings	When the change occurs, the maximum number of rings Stratagy must wait when transferring a call to this User ID before determining a *Ring No Answer.* Possible values: 0 (uses system default), 1 ~ 9 Default: 0

STRGY-PROG.t04-02.c

Table 4-2
Auto (Scheduling) Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Auto Record Options (continued) (modify)		
User ID Information (continued)	Do Not Disturb (DND)	Value for *Do Not Disturb* when the change occurs, even if the Users Menu *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)
	Call Screening	Value for *Call Screening* when the change occurs, even if the Users Menu *Lock Call Screening* is ON. *ON:* Stratagy asks the caller to "record your name at the tone" and plays that recording to the User, allowing him to press 1 to accept the call or press 2 to reject the call. If rejected, Stratagy plays the mailbox greeting to the caller. If accepted, Stratagy connects the caller to the user. *OFF:* Stratagy transfers the caller 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 *Current Greeting Max* is set to *0* (user cannot change greeting). Possible values: 0, 1 ~ 7 Default: 0 (system greeting)

STRGY-PROG.104-02.d

Table 4-2
Auto (Scheduling) Menu Fields (continued)

5 USING THE NOTIFY MENU

The Notify Menu enables you to program Stratagy to automatically call a user to notify him of messages. There are ten Notify records available for each User ID. Each record represents one method of notifying the user of new messages.

There four types of notification (normal, relay, pickup, and special) are based on the action that activates the notification. Notification methods are programmed using tokens and include message waiting lights, beepers or pagers, other telephones (inside extensions or outside numbers), and office paging systems.

Through the use of templates (predefined notification instructions), fields may be defined and then 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 (e.g., Monday through Friday)
- Hours of the day (e.g., between 8 a.m. and 5 p.m.)
- Time interval between notifications (e.g., every 30 minutes)
- Number of times to repeat notification process (e.g., 2 times)

5.1 ACCESSING AND EXITING THE NOTIFY MENU

5.1.1 ACCESSING THE NOTIFY MENU

Access the Notify Menu through the Users Menu. While viewing a specific User ID mailbox record, select Notify by entering:

Alt + N

5.1.2 EXITING THE NOTIFY MENU

When you have finished defining the Notify records, press **Esc** to return to the Users Menu.

IMPORTANT NOTE:
If you want to save your modifications to the current Notify record, be sure to press Alt + S to save before pressing Esc.

5.2 THE NOTIFY MENU

The Notify Menu (Figure 4-4) consists of four parts:

Menu Bar: access and viewing options (select).

Mailbox Identification: 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).

For a description of the Notify Menu, including the definition of each field, see Table 4-3. In addition, when using the menu, press **F1** to display detailed help for the current field.

5.3 TEMPLATES

Templates are general notification actions which may be used for any number of Notify records for any number of 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.

IMPORTANT NOTE:
Modifying the template changes the template for all User IDs using the template.

You can create a template when you:

- Create a new Notify record
- Modify a Notify record that is based on an existing template

You can modify a template when you:

- Modify a Notify record that is based on an existing template

For details, see "Defining a Notify Record" below.

5.4 DEFINING A NOTIFY RECORD

Defining a Notify record involves one of the following:

- Creating a Notify record without using a template
- Creating a Notify record using a template
- Modifying an existing Notify record

5.4.1 CREATING A NOTIFY RECORD WITHOUT USING A TEMPLATE

1. In the Notify Record Summary area, use **PgDn** and **PgUp** to highlight the first available *<Disabled>* description line.
2. Press the **spacebar** to toggle the Notify Record Options *Enable* field to *YES*.
3. Define the Notify Record Options fields. Use **Enter** or the arrow keys (↑ ↓) to move between fields.

NOTE:
To display detailed help for the current field, press **F1**.

4. Press **Alt** + **S** to save the record. Stratagy asks:

   Add New Template [N Y]

   Y: Yes, add this Notify record to the template database and to the user's Notify record.

   N: No, prevent this information from being added to the template database. Stratagy prompts:

   Overwrite current (default) record [N Y]

   Y: Yes, overwrite the default notification template with this information.

   N: No, prevent this notification record from overwriting the current (default) record.

   Stratagy automatically transfers the data to the first available description line in the Notify Record Summary.

5.4.2 CREATING A NOTIFY RECORD USING A TEMPLATE

1. In the Notify Record Summary area, use **PgDn** and **PgUp** to highlight the first available *<Disabled>* description line.
2. Press the **spacebar** to toggle the Notify Record Options *Enable* field to *YES*.
3. Select the template.
   a. Press **Alt** + **T** to access the existing predefined notification templates.
   b. Use **PgDn** and **PgUp** to highlight the template.
   c. Press **Enter** to select the template.

   Stratagy displays the template information in the appropriate Notify Record Options fields.
4. If the *Method* field contains the characters %V, fill in the *Variable* field with the appropriate telephone number or information.
5. Press **Alt** + **S** to save the record. Stratagy automatically transfers the data to the appropriate description line in the Notify Record Summary.

5.4.3 MODIFYING AN EXISTING NOTIFY RECORD

1. In the Notify Record Summary area, use **PgDn** and **PgUp** to highlight the record you want to define.
2. If appropriate, press the **spacebar** to toggle the Notify Record Options *Enable* to YES.
3. Define the Notify Record Options fields. Use **Enter** or the arrow keys (↑ ↓) to move between fields.

   NOTE:
   To display detailed help for the current field, press **F1**.

4. Press **Alt** + **S** to save the record. If this Notify record is a change to an existing template, Stratagy also prompts:

   Cancel, **R**eplace Template, or **A**dd New Template [CRA]

   C: (cancel) Prevent the Notify record from overwriting the existing template.

   R: (replace template) Overwrite the old template with this new Notify record.

   IMPORTANT NOTE:
   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.

   A: (add) Add this Notify record to the template database as a new template.

   Stratagy automatically transfers the data to the appropriate description line in the Notify Record Summary.

5.5 DISABLING A NOTIFY RECORD

To disable an existing Notify record:

1. Use **PgDn** and **PgUp** to highlight the appropriate *<Enabled>* description line in the Notify Record Summary.
2. Press the **spacebar** to toggle the *Enable* field of the Notify Record option area to NO.
3. Press **Alt** + **S** to save the record.

   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 *Enable* field to YES.

```
Save  Templates                          Esc/EXIT PgDn/NEXT PgUp/PREV | Notify

  User ID:       203     Comment:                          Security Code:
Extension: 203
Directory Name 1: JOHNSON          Directory Name 2: KEN

 DK 280  LGHT ON  SMTWTFS  00:00-23:59  0 min/2 min/1 max
 DK 280  LGHT OFF SMTWTFS  00:00-23:59  0 min/2 min/1 max
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>
 <DISABLED>

Enabled  M T W T F S S   From  To     Notify After   Continue Every   Max Times
  YES    Y Y Y Y Y Y Y   00:00 23:59     0 min           2 min            1

  Title: DK 280  LGHT ON       Type: NORMAL      Variable:
 Method: #63%E-
```

Figure 4-4
Notify Menu with Sample Data

MENU AREA	FIELD	DESCRIPTION
Menu Bar (select)		
Access Options	Save	Press **Alt** + **S** to save the current new or modified Notify record. **If this Notify record is a new entry**, Stratagy also asks: Add New Template [N Y] *Y:* Yes, add this Notify record to the template database and to the user's Notify record. *N:* No, prevent this information from being added to the template database. Stratagy prompts: Overwrite current (default) record [N Y] *Y:* Yes, overwrite the default notification template with this information. *N:* No, prevent htis notification record from overwriting the current (default) record. **If this Notify record is a change to an existing template**, Stratagy also prompts: **C**ancel, **R**eplace Template, or **A**dd New Template [CRA] *C:* (cancel) Prevent the Notify record from overwriting the existing template. *R:* (replace template) Overwrite the old template with this new Notify record. ***IMPORTANT NOTE:*** ***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.*** *A:* (add) Add this Notify record to the template database as a new template.

STRGY-PROG.t04-03.a

Table 4-3
Notify Menu Fields

MENU AREA	FIELD	DESCRIPTION
Menu Bar (continued) (select)		
Access Options (continued)	Templates	To select an existing template (pre-set notification instructions): 1. Press **Alt** + **T** to access the existing templates. 2. Use **PgDn** and **PgUp** to highlight the template you want to use. 3. Press **Enter** to select the template. 4. Stratagy displays the template information in the appropriate Notify Record Options fields. 5. If the *Method* field contains the characters **%V**, fill in the *Variable* field with the appropriate telephone number or other information.
Exit Option	Esc/EXIT	Press **Esc** to return to the Users Menu.
Viewing Options	PgDn/NEXT	Press **PgDn** to view the next Notify record for this User ID.
	PgUp/PREV	Press **PgUp** to view the previous Notify record for this User ID.
Menu Identification	Notify	Menu title.
Mailbox Identification (display; defined in the Users Menu)		
	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 this 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 will search for when a caller uses the 411 company directory.
	Directory Name 2:	The second of two names Stratagy may search for when a caller uses the 411 company directory.
Notify Record Summary (display; one line descriptions of existing notifications)		

STRGY-PROG.t04-03.b

Table 4-3
Notify Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Notify Record Options (modify)		
Notification Enabled	Enabled	Enable or disable the current Notify record. *YES:* Enable the record. Stratagy carries out the instructions defined by the record. ENABLED displays. *NO:* Disable the current Notify record. NO displays. Possible values: YES, NO Default: NO (disabled)
Frequency of Notification	MTWTFSS	Days of the week to which notification is restricted. *Y:* Yes, notification occurs on this day of the week. *Y:* No, 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. 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)

STRGY-PROG.t04-03.c

Table 4-3
Notify Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Notify Record Options (continued) (modify)		
Frequency of Notification (continued)	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.)
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.
	Type	Notification type for this record. To select the type: 1. Press **F2** when the cursor is in the *Type* field to display the options. 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 phone, calling a cellular phone, 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.

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Table 4-3
Notify Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Notify Record Options (continued) (modify)		
Notify Features (continued)	Type (continued)	**RELAY:** Notify user by relaying the caller's phone 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 phone number and press **#** Stratagy stores the phone number in the *Method* field token %R. **User notified** when the caller's phone number is relayed to the user's beeper display or forwarded to a voice answered phone. **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 Your 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 disk space is low. **Notification begins** when the available disk storage space reaches the predefined limit (set during System Configuration). The default is 20%. **Notification ends** when the maximum number of tries (*Max Times*) has been reached.

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Table 4-3
Notify Menu Fields (continued)

MENU AREA	FIELD	DESCRIPTION
Notify Record Options (continued) (modify)		
Notify Features (continued)	Type (continued)	**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. Possible values: NORMAL, RELAY, PICKUP, DISK, URGENT Default: NORMAL
	Method	Programmed dial actions Stratagy performs to notify the user. Valid entries: include User ID mailbox, phone extension, special programming language Default: blank (DND not active)
	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: ■ Allows notification templates to be used for many users. ■ Enables field personnel to be notified at different destinations during the day or week. **If the first Notify record uses %V**, the field can be defined automatically when a user uses the *Change Out Dial Number* feature for performing message notification. Possible values: blank, telephone number, extension, token programming language Default: blank

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Table 4-3
Notify Menu Fields (continued)

Stratagy™ 4/6/24

PROGRAMMING SECTION

CHAPTER 5
SPECIAL GREETING USER ID MAILBOXES

TABLE OF CONTENTS

Chapter 5 — Special Greeting User ID Mailboxes

CHAPTER 5

SPECIAL GREETING USER ID MAILBOXES

1 INTRODUCTION

Stratagy contains four special greeting User ID mailboxes. These are:

Company greeting – The salutation that lets the caller know which company he called. Default is User ID 990.

Caller instructions – Give the caller options for reaching departments or information. Default is User ID 991.

Employee directory instructions – The caller enters the first few letters of the name of the person he wants to contact. Stratagy plays the corresponding User ID's "name and extension" 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 wants to reach. Default is User ID 0.

When initially setting up the system, you will need to define each of the special greeting mailboxes. This includes:

- Recording the greetings
- Customizing the User ID mailbox (e.g., using the Auto Menu to schedule greetings)

You can modify these greetings and customizations as needed.

This chapter discusses:

- Recording mailbox greetings
- Initial greeting mailboxes (company greeting and caller instructions)
- Employee directory instructions
- Operator mailbox greeting

Use the forms in Appendix A as an aid in defining each of the special greeting mailboxes. For detailed information about customization, see Chapter 4. For customization examples, see Appendix B.

2 RECORDING MAILBOX GREETINGS

The step-by-step procedure for recording greetings is as follows. See the *User Guide* for details.

1. Access the User ID mailbox from your telephone.
   a. Call Stratagy by dialing its extension.
   b. After Stratagy answers, press ***** to enter User mode.
   c. Enter the User ID mailbox number:
      user id + **#**
   d. Enter the security code:
      security code + **#**
2. The User Main Menu plays. Press **2** (Change your greeting).
3. The Select Greeting Menu plays. Press the *greeting number.*
4. The Record Greeting Menu plays. Press **2** to record your greeting.
5. Record the greeting. As soon as you finish, press **#**.
6. The Record Greeting Menu plays. Press **1** to review the recording.

   To re-record the greeting, press **2** (step 4 above).

   To save the greeting recording, press **9**. Press **9** again to return to the Select Greeting Menu. You can record another greeting or return to the User Main Menu.

3 THE 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.

When a caller first reaches Stratagy, Stratagy plays the company greeting. Typically this is a salutation which lets the caller know which company he has called. For example,

> "Thank you for calling..."

By default, Stratagy then plays the caller instructions. 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. For example:

> "To reach the person you are calling, enter their extension number. To reach the operator, press 0 or stay on the line."

You can schedule different initial greetings to play different times of the day, different days of the week, or even a specific day of the year.

For details about how Stratagy processes incoming calls, see Chapter 2, "How Stratagy Operates." If you need to change the initial greeting defaults for specific channel ports, use the Stratagy Configuration Utility. See Chapter 3, "Configuring and Backing Up Stratagy" in the Installation section for details.

3.1 RECORDING AND CUSTOMIZING THE COMPANY GREETING

3.1.1 RECORDING THE COMPANY GREETING

You can record up to seven greetings that you can schedule to play as needed. To record the company greeting, access Stratagy as the company greeting User ID. Follow the steps outlined in "Recording Mailbox Greetings." The default values are:

User ID: 990
Security Code: 990

Change the value for the security code as soon as possible.

3.1.2 CUSTOMIZING THE COMPANY GREETING MAILBOX

To customize the company greeting User ID mailbox (991), access the User ID through the Users Menu. Note:

- Company greeting User ID mailbox 990 chains to caller instructions User ID mailbox 991
- Use the Auto Menu to schedule the greetings to play as needed

For detailed information about customization, see Chapter 4, "Customizing User ID Mailboxes" and Appendix B, "Customization Examples."

3.2 RECORDING AND CUSTOMIZING CALLER INSTRUCTIONS

3.2.1 RECORDING THE CALLER INSTRUCTIONS

Since the caller instructions are the default when Stratagy continues to process a call, it is important that the instructions start with something like "To reach the person you are calling, enter their extension number."

You can record up to seven greetings (caller instructions) that you can schedule to play as needed.

To record the caller instructions, access Stratagy as the Caller Instructions User ID. Follow the steps outlined in "Recording Mailbox Greetings." The default values are:

User ID: 991
Security Code: 991

Change the value for the security code as soon as possible.

3.2.2 CUSTOMIZING THE CALLER INSTRUCTIONS MAILBOX

To customize the caller instructions User ID mailbox (991), access the User ID through the Users Menu. Use the Auto Menu to schedule the greetings to play as needed. For detailed information about customization, see Chapter 4, "Customizing User ID Mailboxes" and Appendix B, "Customization Examples."

3.3 SAMPLE INITIAL GREETINGS

The following sample initial 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.

4 EMPLOYEE DIRECTORY INSTRUCTIONS

Stratagy ships with User ID 411 predefined as the access box for the employee directory. When a caller uses the directory, he enters the first few letters of the name of the person he wants to contact. When Stratagy makes a match, it plays the User ID "name and extension" recording. The caller enters the extension number to reach the person.

4.1 HOW STRATAGY MAINTAINS THE DIRECTORY

Stratagy automatically maintains the directory using:

- The names you create using the Users Menu *Directory Name 1* and *Directory Name 2* fields. To avoid having a User ID appear in the 411 directory,

leave these fields blank. For details, see Chapter 4, "Customizing User ID Mailboxes."

- Recordings users make of their names and extensions via telephones using Stratagy's User mode. See the *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 and extension" recording. Therefore, it is important that users record their "name and extension," e.g., "Donna Smith, extension 112." If a user has not recorded a "name and extension," Stratagy plays the User ID number. If there are several matches, Stratagy plays all of them.

4.2 RECORDING EMPLOYEE DIRECTORY INSTRUCTIONS

The recording you make should be consistent with your customization of User IDs. Note the following:

- Since the letters Q and Z do not appear on the telephone keypad, you will 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 employee directory instructions, access Stratagy as the Employee Directory Instructions User ID. Follow the steps outlined in "Recording Mailbox Greetings." The default values are:

User ID: 411
Security Code: 411

Change the value for the security code as soon as possible.

4.3 SAMPLE EMPLOYEE DIRECTORY INSTRUCTIONS

A typical 411 directory recording is:

> "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."

The initial 411 directory recording that comes with Stratagy is:

> "Enter the first few letters of the first or last name of the person you wish to reach."

5 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 phone) or do not know the extension of the party they want to reach. When a caller accesses the operator mailbox, Stratagy plays its greeting which advises the caller on how the call will be handled. The caller can then leave a message in the mailbox (which the operator usually forwards on the next business day).

5.1 RECORDING THE OPERATOR MAILBOX GREETING

The operator mailbox greeting advises callers on how their messages will be handled. The greeting should cover the following information:

- Inform the caller that he has reached the operator mailbox
- Remind the caller to leave his 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, access Stratagy as the operator mailbox User ID. Follow the steps outlined in "Recording Mailbox Greetings." The default values are:

User ID: 0
Security Code: 0

Change the value for the security code as soon as possible.

5.2 CUSTOMIZING THE OPERATOR MAILBOX

To customize the operator greeting User ID mailbox (0), access the User ID through the Users Menu. Use the Auto Menu to schedule greetings to play as needed. For detailed information about customization, see Chapter 4, "Customizing User ID Mailboxes" and Appendix B, "Customization Examples."

5.3 SAMPLE OPERATOR GREETING

A typical operator mailbox greeting is:

> "You have reached the operator mailbox. Please leave a message at the tone. Your message will be forwarded on the next business morning."

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PROGRAMMING SECTION

CHAPTER 6
TOKEN PROGRAMMING LANGUAGE

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Chapter 6 — Token Programming Language

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CHAPTER 6

TOKEN PROGRAMMING LANGUAGE

1 INTRODUCTION

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:

- Fax back
- Confirming digits entered by a caller
- Relaying messages to digital pagers
- Controlling message waiting lights

This chapter discusses:

- Using the Token Programming Language
- The programming tokens

2 USING THE TOKEN PROGRAMMING LANGUAGE

The Token Programming Language may be used in the following fields:

Users' *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 Users' 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.

All tokens are available for the Stratagy 24. Fax tokens are not available for the Stratagy 4 and 6. Serial port tokens are not available for the Stratagy 4.

Stratagy provides reserved User ID mailboxes that have common features pre-programmed, including future delivery, guest defaults, and fax tone detect. In addition, User IDs 7000 ~ 7014 provide pre-programmed fax features that can be copied and used for defining User ID records. Notify contains templates (e.g., message waiting light control and pagers) you can use for defining User ID Notify records.

For examples on how to use the Token Programming Language, see Appendix B.

3 THE PROGRAMMING TOKENS

The Token Programming Language uses three types of tokens: singular, defined, and replaced.

- **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.
- **Defined** tokens are expressed with left and right parentheses surrounding one or more options that define how the token should work. For example, the Goto token G( ) takes one option and causes Stratagy to immediately continue processing at the User ID specified. For (G123), Stratagy continues processing at User ID 123.
- **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 6-1 summarizes the singular, defined, and replaced tokens. For a detailed description of each token, see Table 6-2.

SINGULAR TOKENS	
@	Suppress normal process.
1 ~ 9, 0, *, #, A ~ D	Play DTMF tone.
-, ,	Pause.
~, E	Recall.
F	Hook-flash.
X, Y, Z	Message waiting light control.
DEFINED TOKENS	
G(*uid*)	Go to User ID.
H(*uid*)	Hang-up process.
I(*string,relationship, string,uid*)	*If* conditional.
J(*file,"string"*) J(*file,"","tokens"*)	Receive fax.
L(*language_file*)	Switch system language.
M(*Gn,count,delay*)	Audiotext menu.
O(*tenths*)	Timed on-hook.
Prepeat(*item*)	Play (say) specific information.
Q(G*n,...*)	Question and answer.
R(*Gn,%Sm,delay*)	Read DTMF from caller.
S(*port,"S",%Sn, "termination",length, timeout*)	Serial port access.
T(*file,"string"*) T(*file,"","tokens"*)	Transmit fax.
V(*file,field,item,%Sn*)	Search for value.
W(*n*) W(*n*,P) W(*n*,T) W(*n*,V)	Wait (pause) for event.

DEFINED TOKENS (continued)	
+(%Sn,*item*)	Addition.
=(%Sn,*"item"*) =(%S*n,"item",start, end*)	Assignment.
?(*item,file,uid*)	Exists in file.
<(*"string"*)	Start incremental fax.
>(*"file"*)	Add incremental fax.
I(*file*)	Append variables to file.
[(*file*)	Read %S variables state.
](*file*)	Write %S variables state.
^(*n*)	Change port volume.
{*file*}	Input file.
REPLACED TOKENS	
%B1 ~ %B6	Board serial number.
%D	Disk space remaining.
%E	Extension field.
%M	Messages.
%N	New Messages.
%P	Previous.
%R	Relay page.
%S0 ~ %S9	Store value.
%T	Connect time.
%U	User ID.
%V	Variable.
%Y	Current date.
%Z	Current time.
LEN[%S*n*]	Length.

Table 6-1
Summary of Token Programming Language Tokens

TOKEN	FUNCTION	DEFINITION
Singular Tokens		
@	Suppress normal process.	**Syntax: @** **Description:** Prevents Stratagy from normally processing an *Extension* or *Method* field. ■ Normally when Stratagy evaluates an *Extension* field, Stratagy 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 will not attempt to access a port for an outbound notification call.
1	DTMF 1.	**Syntax: 1** **Description:** Plays DTMF tone 1.
2	DTMF 2.	**Syntax: 2** **Description:** Plays DTMF tone 2.
3	DTMF 3.	**Syntax: 3** **Description:** Plays DTMF tone 3.
4	DTMF 4.	**Syntax: 4** **Description:** Plays DTMF tone 4.
5	DTMF 5.	**Syntax: 5** **Description:** Plays DTMF tone 5.
6	DTMF 6.	**Syntax: 6** **Description:** Plays DTMF tone 6.
7	DTMF 7.	**Syntax: 7** **Description:** Plays DTMF tone 7.
8	DTMF 8.	**Syntax: 8** **Description:** Plays DTMF tone 8.
9	DTMF 9.	**Syntax: 9** **Description:** Plays DTMF tone 9.
0	DTMF 0.	**Syntax: 0** **Description:** Plays DTMF tone 0.
*	DTMF *.	**Syntax: *** **Description:** Plays DTMF tone *.
#	DTMF #.	**Syntax: #** **Description:** Plays DTMF tone #.
A	DTMF A.	**Syntax: A** **Description:** Plays DTMF tone A.
B	DTMF B.	**Syntax: B** **Description:** Plays DTMF tone B.
C	DTMF C.	**Syntax: C** **Description:** Plays DTMF tone C.
D	DTMF D.	**Syntax: D** **Description:** Plays DTMF tone D.

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Table 6-2
Token Programming Language Tokens

TOKEN	FUNCTION	DEFINITION
Singular Tokens (continued)		
- **(dash)**	Short pause.	**Syntax: -** **Description:** Pauses for 0.5 (one-half) second.
, **(comma)**	Long pause.	**Syntax: ,** **Description:** Pauses for 2 seconds.
~	Timed break recall.	**Syntax: ~** **Description:** Pulse dials the digit 1 to effect a timed break recall.
E	Earth recall.	**Syntax: E** **Description:** Performs an earth recall. This is used in place of the hook-flash (the **F** token) on some switches.
F	Hook-flash.	**Syntax: F** **Description:** Performs a hook-flash. The length of the hook-flash is specified in the telephone system dial codes section of the Stratagy Configuration Utility (see the Installation section).
X	Remember event - message waiting light control.	**Syntax: X** **Description:** Creates the file LIGHT.ON in the User ID's directory. This is 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. **Example:** 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. For details, see Appendix B, "Customizing User ID Mailboxes – Examples."
Y	Forget exent - message waiting light control.	**Syntax: Y** **Description:** Deletes the LIGHT.ON file in the User ID's directory. **Example:** A message waiting light that uses a different code to turn off the light than to turn on the light. For details, see Appendix B, "Customizing User ID Mailboxes – Examples."
Z	Test event - message waiting light control.	**Syntax: Z** **Description:** 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.
Defined Tokens		
G( )	Go to User ID.	**Syntax: G*(uid)*** Where: ***uid*** Any valid User ID. **Description:** Immediately continues processing at the User ID specified. Stratagy continues standard processing at the User ID per the User ID mailbox processing diagram (Chapter 2, "How Stratagy Operates"). **Example:** G(299) Go to User ID 299.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
H( )	Hang-up process.	**Syntax: H*(uid)*** Where: ***uid*** Any valid User ID. **Description:** 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. If the User ID is omitted, Stratagy hangs up without processing the specified User ID.
I( )	*If* conditional.	**Syntax: I*(string,relationship,string,uid)*** Where: ***string*** Any quoted set of charaters, numbers, and/or variables. ***relationship*** Either >, <.=, ! which test for greater than, less than, equal, or not equal. ***uid*** Any valid User ID. **Description:** 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. **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 at 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.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
J( )	Receive fax.	**Syntax: J*(file,"string")*** **J*(file,"","tokens")*** Where: ***file*** File name of the fax you want to receive. Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. If it consists of only numbers, it is assumed to be a User ID and the received fax is stored as a message. ***"string"*** DTMF digits representing the telephone number that should be dialed to connect to the fax device that will send the transmission. If it is the empty string, i.e., "", then Stratagy waits until a call rings into the appropriate fax port. ***"tokens"*** Actions Stratagy should take to properly connect the call to the fax port. For more information, see the **T( )** token. **Description:** The **J( )** token allows you to receive faxes as User ID messages or for later transmission with the **T( )** token. **Examples:** J(C:\\FAXES\\FAX1,"") Causes Stratagy to set up one of the fax modems to wait for a call and accept a fax called C:\FAXES\FAX1. This is useful for loading a fax into Stratagy. J(123,"","P(G1)F-%FH") Sets up a personal fax mail User ID that allows for one-call fax transmission. **P(G1)** Play "Start your fax machine at the tone" **F** Hook-flash to put the call on hold **-** Pause **%F** Dial the extension of the fax port being used **H** Hang-up (completes an unsupervised transfer)
L( )	Switch system language.	**Syntax: L*(language_file)*** Where: ***language_file*** File name in the Stratagy directory that represents a Strataagy system language file which has the DOS suffix .IDX. **Description:** 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. **Examples:** L(ENGLISH) Uses the ENGLISH.IDX system prompt file in the C:\STRATAGY directory. L(SPANISH) Uses the SPANSIH.IDX system prompt file in the C:\STRATAGY directory.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
M( )	Audiotext menu.	**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. **Description:** The **M( )** token allows you to specify fast single-digit entry for audiotext 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. As soon as 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. **Examples:** M(G1,2,20) Plays greeting 1 up to 2 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 *Menu* field 5. ■ 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.
O( )	Timed on-hook.	**Syntax: O*(tenths)*** Where: ***tenths*** Time in tenths of seconds. **Description:** 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. **Example:** O(60) Go on-hook for 6 seconds (60 ÷ 10 = 6).

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
P( )	Play.	**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: D — Percentage of remaining disk space. G*n* — Greeting *n* of the current User ID. G*n*, *uid* — Greeting *n* of User ID *uid*. M — Total number of messages and number of new messages for the current User ID. M, *uid* — Total number of messages and number of new messages for the current User ID *uid*. R — DTMF digits entered by a caller who has invoked relay paging (used only in the Notify record *Method* field). %S*n* — DTMF digits currently represented by the variable %S*n*, where *n* is a number from 0 to 9. This is most effective for repeating the DTMF entered by a caller for confirmation. %S*n*, N — DTMF digits currently represented by the variable %S*n* as a number where the range is assumed to be between 0 and 999 million. %S*n*, D — DTMF digits currently represented by the variable %S*n* as a date, where the format is assumed to be either mmddyy (which assumes a year in the 1900s) or mmddyyyy. %S*n*, T — DTMF digits currently represented by the variable %S*n* as a time of day, where the format is assumed to be hhmm. %S*n*, $ — DTMF digits currently represented by the variable %S*n* as a dollar amount, where the last two digits are assumed to be cents. %S*n*, F — The same as %S*n*, $ except Stratagy uses francs and centimes. %S*n*, P — The same as %S*n*, $ except Stratagy uses pesos and centavos. U — "Name and extension" recording for the current User ID. If there is no recoding, Stratagy says the User ID digits. U, *uid* — "Name and extension" recording for the User ID *uid*. If there is no recoding, Stratagy says the User ID digits *uid*. V — Digits in the Notify record's *Variable* field.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
P( )	Play.	(continued) **Description:** The **P( )** token allows 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. **Examples:** P(G1) Stratagy plays greeting 1 for the current User ID. This allows 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 ninteen dollars and ninety-four cents." P(06261994,N) Stratagy says "Six million two hundred sixty-one thousand nine hundred ninety-four."
Q( )	Question and answer.	**Syntax: Q(*Gn*...)** Where: ***Gn*** Greeting number (range: 1 ~ 7). **...** Additonal greetings to use. **Description:** The **Q( )** token allows you to ask a caller a series of questions and store all the caller's responses as a single message 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 queston/greeting until all the specified questions/greetings have been played. You can ask the caller up to 20 questions. To play more than 7 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. **Example:** Q(G1,G2 ,G3,G4,G5,G6,G7,G1#9000,G2,#9000) Stratagy asks 9 questions as recorded in the specified greetings, records 9 responses, and stores the responses as one message.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
R( )	Read DTMF from a caller.	**Syntax: R(G*n*,%S*m*,*delay*)** Where: **G*n*** Greeting number for the current User ID (range 1 ~ 7). **%S*m*** One of the %S storage variables (range: 0 ~ 9). ***delay*** Time in tenths of seconds to wait for DTMF after playing the greeting (range: 0 ~ 99). If omitted, defaults to 0. **Description:** The **R( )** token allows 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 allows 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., "". **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), which: • Plays greeting 1. • Stores the caller's entry in variable %S6. • Waits 2 seconds (20 ÷ 10 = 2) for DTMF after playing the greeting.
S( )	Serial port access.	**Syntax: S(*port,"S",%Sn,"termination",length, timeout*)** Where: ***port*** Logical serial port (1 or 2) mapped onto a physical port number by the Setup Utility configuration option *serial_port1* for logical port 1 or *serial_port2* for logical port 2 (Section 2, *Installation*). ***"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 **%S*n*** One of the %S storage variables (range: 0 ~ 9), which stores any response from the serial port. If omitted, Stratagy will not wait for a response. ***"termination"*** List of characters that defines when Stratagy should stop reading from the serial port for storing in the specified %S*n* variable. If omitted, defaults to "\N\R" as specified under "*S*". The terminating character, if any, will not be part of %S*n*.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
S( )	Serial port access.	(continued) ***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 placed in the %S*n* variable. If this option is omitted, it defaults to the maximum length of %S*n* (128 characters). ***timeout*** Maximum time (in 100 ms units) Stratagy waits for input on the serial port when reading into the %S*n* 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 %S*n* variable. If this option is omitted, the default is the value of the Setup Utility's configuration option *tmo_serial* (Section 2, *Installation*). **Description:** 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 allows for 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 in the Stratagy Configuration Utility's System Configuration options (Installation section, Chapter 5, "Configuring and Backing Up Stratagy").
T( )	Transmit fax.	**Syntax: T(*file,"string"*)** **T(*file,"tokens"*)** Where: ***file*** File name of the fax you want to transmit. Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. ***"string"*** DTMF digits representing the telephone number that should be dialed to connect to the fax device that will accept the transmission. It may contain %S storage variables. If it is the empty string, i.e., "", then Stratagy waits until a call rings into the fax port. ***"tokens"*** Actions Stratagy should take to properly connect the call to the fax port. Typically it would be P(G1)F-%FH, which allows for one-call fax transmission. P(G1) Say "Start your fax machine at the tone." F Hook-flash to put the call on hold. - Pause (0.5 second). %F Dial the extension of the fax port being used. H Hang up (completes an unsupervised transfer).

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
T( )	Transmit fax.	(continued) **Description:** Performs fax transmissions to either a specified telephone number or to a connected call. For a two-call fax back, use the two option syntax. For a one-call fax on demand, use the three option syntax. If Stratagy has a free fax port available, transmission begins shortly on that port. Otherwise, the request will be queued for transmission along with any other such requests. Normally you will install your fax software so that if a transmission fails (for instance, if the remote fax is busy), then the request will be retried automatically at a later time, up to a maximum number of retries. Naturally, you must have installed and configured at least one fax/modem on Stratagy. **Example:** Suppose you obtained the caller's fax number and stored it in %S1. Then to fax the specified file to that user, you might use: T(FAX.DCX,"9,%S1") FAX.DCX name of the file to transmit 9 dial 9 for an outside line , pause 2 seconds %S1 dial the DTMF digits stored in %S1
V( )	Search for value.	**Syntax:** V(*file,field,item,field,*%S*n*) Where: ***file*** ASCII DOS file that is field comma-delimited and record-return delimited. ***field*** Number of the field in *file* (1 is the value of the field before the comma). ***item*** An alphanumeric string which may contain %S variables. **%S*n*** One of the %S storage variables (range: 0 ~ 9). **Description:** The **V( )** token searches the specified *file*, in the specified *field*, for the value given by *item*. If Stratagy finds the value, Stratagy stores the contents of the second *field* into variable %S*n*. If Stratagy does not find the value, the token terminates and returns to the DONE state.
W( )	Wait or pause for event.	**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. **Description:** General wait token that allows 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.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
W( )	Wait or pause for event.	(continued) **Example:** W(3,P) Wait 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.
+( )	Addition.	**Syntax: +(%S*n*,*item*)** Where: **%S*n*** One of the %S storage variables (range: 0 ~ 9). ***item*** Positive or negative value or another %S variable. **Description:** Allows you to perform modifications to values for calculation and control. Ideal for controlling limits and loops.
=( )	Assignment.	**Syntax: =(%S*n*,*"item"*)** **=(%S*n*,*"item"*,*start*,*end*)** Where: **%S*n*** One of the %S storage variables (range: 0 ~ 9). ***item*** Any alphanumeric string. May contain %S variables. ***start*** Starting character position for assigning a portion of *item*. ***end*** Ending character position to assign when used with *start*. **Description:** Gives the specified storage variable the value specified. The value may be a sting or a numeric and should be quoted. The four-option syntax allows for substring assignments. **Examples:** =(%S1,"FRENCH") Gives %S1 the value of "FRENCH". =(%S1,"FREN CH",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.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
?( )	Exists in file.	**Syntax: ?(*item,file,uid*)** Where: ***item*** *Any* alphanumeric string. May also contain %S variables. ***file*** ASCII text file specified by a DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. ***uid*** Valid User ID. **Description:** Searches the specified file for the specified item. Stratagy searches the file on a line-by-line basis and the item is found when it matches an entire line within the file. If the item is found, processing continues at the User ID specified; otherwise, processing continues with the next token. One use of this token is to control the use of a fax-on-demand feature. If you find that someone is having a document faxed repeatedly to a phone number (perhaps the phone number of someone who does not want your fax), you can enter such numbers into a file, then program Stratagy to check an entered fax number against those in the file and, if it's found, branch to a User ID which plays a greeting saying that the entered phone number is invalid and then hang up. If the entered number were not found in the file, then processing would continue normally and the fax would be sent to the requester.
<( )	Start incremental fax.	**Syntax: <(*"string"*)** Where: ***string*** DTMF digits representing the telephone number that should be dialed. It may contain %S variables. If it is the empty string, i.e., " ", then Stratagy waits until a call rings into the fax port. **Description:** Allows you to have a caller request multiple FAX documents and then to transmit the requested documents with one call. The **<( )** token must be used with the **>( )** token. To FAX multiple documents, first initiate the process with this token and as the caller requests faxes, add the requested document using the **>( )** token. The fax is sent automatically after the caller hangs up.
>( )	Add incremental fax.	**Syntax: >(*"file"*)** Where: ***file*** DOS file name of the FAX you want to transmit. Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. **Description:** Allows you to transmit more than one requested document with one call. Before using this token, you must first start incremental faxing with the **<( )** token. See the **<( )** token for details.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
I( )	Append variables to file.	**Syntax:** I(***file***) Where: ***file*** Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. **Description:** Writes all ten %S variables (%S0 through %S9) 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.
[( )	Read %S variables state.	**Syntax:** [(***file***) Where: ***file*** Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. **Description:** Reads the values of all ten %S variables (%S0 ~ %S9) 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. *NOTE:* *To avoid potential simultaneous access errors: within the same User ID, if you read with the **[( )** token, you should write with the **]( )** token.*
]( ) ( )	Write %S variables state.	**Syntax:**](***file***) Where: ***file*** Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. **Description:** Writes the values of all ten %S variables (%S0 ~ %S9) to the specified file. Typically, you would use this with the [( ) token which reads the %S variables. *NOTE:* *To avoid potential simultaneous access errors: within the same User ID, if you read with the **[( )** token, you should write with the **]( )** token.*
^( )	Change port volume.	**Syntax:** ^(***n***) Where: ***n*** Volume of current port (range: -8 to 8). -8 is the softest 0 is the default initial volume 8 is the loudest. **Description:** Changes the volume of the current port to the specified level.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Defined Tokens (continued)		
{ }	Input file.	**Syntax: {*file*}** Where: ***file*** File name that represents an ASCII text file containing valid Stratagy tokens. Any valid DOS file name. Use two backslashes \\ to signify one backslash \. For example, to specify the file name C:\STRATAGY\NEW.TXT, use C:\\STRATAGY\\NEW.TXT. **Description:** The { } token allows you to use an external file to be read for input of additional tokens.
Replaced Tokens (continued)		
%B1 ~ %B6	Board serial number.	**Syntax: %B1, %B2, %B3, %B4, %B5, %B6** **Description:** Replaces itself 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
%D	Disk space remaining.	**Syntax: %D** **Description:** Replaces itself with the value that represents the percent of free disk space at the time it is used. **Example:** P(%D,N) Say (play) the percentage of free disk space as a number.
%E	Extension field.	**Syntax: %E** **Description:** Replaces with the contents of the current User ID's *Extension* field.
%M	Messages.	**Syntax: %M** **Description:** Replaces with the total number of messages for the current User ID.
%N	New messages.	**Syntax: %N** **Description:** Replaces with the number of new messages for the current User ID.
%P	Previous.	**Syntax: %P** **Description:** Replaces with the User ID previously accessed. **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.	**Syntax: %R** **Description:** Replaces 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.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Replaced Tokens (continued)		
%S0 ~ %S9	Store value.	**Syntax:** %S0, %S1, %S2, %S3, %S4, %S5, %S6, %S7, %S8, %S9 **Description:** Stratagy has ten storage tokens (variables) that allow 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 %S1 storage token 1 %S2 storage token 2 %S3 storage token 3 %S4 storage token 4 %S5 storage token 5 %S6 storage token 6 %S7 storage token 7 %S8 storage token 8 %S9 storage token 9 Each port has a unique set of ten %S tokens which do not conflict. Therefore, two different ports may use the same %S token without disrupting each other's value.
%T	Connect time.	**Syntax: %T** **Description:** Replaces with the current connect time, i.e., the total number of seconds that the port/call has been active.
%U	User ID.	**Syntax: %U** **Description:** Replaces with the current User ID number.
Variable Tokens		
%V	Variable.	**Syntax: %V** **Description:** Replaces 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.
%Y	Current date.	**Syntax: %Y** **Description:** Replaces with the current date (mmddyyyy). This is the same format used in the **P( )** token for dates. **Example:** P(%Y,D) Say the current date: month, day, year.
%Z	Current time.	**Syntax: %Z** **Description:** Replaces with the current time in 24-hour format (hhmm). This is the same format used in the P( ) token for time. **Example:** P(%Z,T) Say the current time in 24-hour format: hours, minutes.

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Table 6-2
Token Programming Language Tokens (continued)

TOKEN	FUNCTION	DEFINITION
Variable Tokens (continued)		
LEN[ ]	Length.	**Syntax: LEN[*Sn*]** where: **%S*n*** One of the %S storage variables (range: 0 ~ 9). **Description :** Replaces with the total number of characters in the %S*n* variable. **Example:** P(LEN[%S1],N) Say the number of characters in %S1 as a number.

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Table 6-2
Token Programming Language Tokens (continued)

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PROGRAMMING SECTION

CHAPTER 7
GENERATING REPORTS

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Chapter 7 — Generating Reports

FIGURE LIST

TABLE LIST

CHAPTER 7
GENERATING REPORTS

1 INTRODUCTION

With the Reports Menu, you can generate a variety of reports that provide information about the Stratagy system and User ID mailboxes.

The Reports Menu, except for the Menu Bar, looks exactly like the Users Menu. To create a report definition (i.e., the content of a report), select any of the Reports Menu's fields. Report definitions can be saved to use for future reports.

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.

This chapter discusses:

- Accessing and exiting the Reports Menu
- The Reports Menu
- Defining the contents of a report
- Running a report
- Report options (viewing, printing and saving)

2 ACCESSING AND EXITING THE REPORTS MENU

2.1 ACCESSING THE REPORTS MENU

Access the Reports Menu through the Main Menu. Enter:

Alt + R

Enter the password. (The default password is Stratagy, with the first letter uppercase.)

NOTE:
The password does not display as you type. If you enter it incorrectly, you must select the Reports Menu again.

2.2 EXITING THE REPORTS MENU

When you have finished with the Reports Menu, press **Esc** to return to the Main Menu.

3 THE REPORTS MENU

The Reports Menu (Figure 7-1) consists of two sections:

Menu Bar – access and viewing options (select)

Report Definition Fields – Users Menus fields for creating a report definition (select)

For a description of the Reports Menu, including the definitions of each field, see Table 7-1.

4 DEFINING THE CONTENTS OF A REPORT

Defining the contents of a report involves selecting the Report Definition Fields of the Reports Menu. This report definition can be saved for future reports you want defined using this format.

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 "Running a Report.") After running a report, you can view, print, or save the report to a file. (See "Report Options.")

4.1 CREATING A REPORT DEFINITION

To create a report definition, number the Report Definition Fields you want in the column order you want them to appear.

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 as follows:

User ID: 1
Messages Maximum: 3
Calls Last: 2

4.2 SAVING A REPORT DEFINITION

To save the report definition you just created:

1. Select Save. Press:

   Alt + S

2. Stratagy prompts for the report name.

   Copy report to...

   Enter a valid report name. Report names may be up to 8 letters long and consist of the letters A ~ Z and digits 0 ~ 9. Report names are not case sensitive, i.e., report names LISTING, Listing, and listing all reference the same file.

   When saved, the Reports Menu displays.

4.3 LOADING AN EXISTING REPORT DEFINITION

To load a report definition that you have previously saved using the Save option:

1. Select Load. Press:

   Alt + L

2. Stratagy prompts:

   Load which report?

   If you know the name of the report definition, enter it.

   If you do not know the name of the report definition:

   - Press **F2** to display all the saved report definitions.
   - To select a saved report definition, use the arrow keys (↑ ↓) to highlight its name. Press **Enter**.

   When loaded, the Reports Menu displays the report definition selections.

5 RUNNING A 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 7-2 for a sample report.

After running a report, you can view, print, or save the report to a file. (See "Report Options.")

To run or compile a report:

1. Select the report definition. You can either create a report definition or load an existing definition. For details, see "Defining the Contents of a Report."

2. To run a report, select Run. Press

   Alt + R

3. Stratagy prompts for the range of User IDs you want to include in the report:

   First User ID:
   Last User ID:

   To access all User IDs, leave *the First User ID* and *Last User ID* fields blank.

   To access a range of User IDs, fill in the range you want to access.

4. Stratagy then prompts whether you want to reset statistics after running the report.

   Reset Statistics When Done? NO

   NO: (default) Stratagy does not reset the statistics.

   YES: Stratagy initializes the statistics for each User ID in the selected range to 0.

   IMPORTANT NOTE:
   If you reset the statistics, Stratagy cannot retrieve the old values after running the report.

5. To run the report, press **Enter** after *Reset Statistics When Done?*

   While running the report, Stratagy displays the User ID currently being processed.

   When Stratagy finishes compiling the report, the Reports Menu displays.

   You can now proceed to view, print, or save the report to a file. See "Report Options" below.

6 REPORT OPTIONS

Once you have run 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.

6.1 VIEWING THE REPORT

To display the report:

1. Select View. Press:

   Alt + V

2. Use the arrow keys (↑ ↓) or **PgUp** and **PgDn** to view different parts of the report.

   NOTE:
   If your report is too wide for the screen, only the columns that fit display.

6.2 PRINTING THE REPORT

If you have a printer attached to Stratagy, you can print the output of a report.

NOTE:
To use the Print option, the Stratagy system Configuration parameter 1pt_port *must define the printer port Stratagy should use.*

To print a report, select Print. Press:

Alt + P

NOTE:
Printing is restricted to 80 characters across.

6.3 FILING THE REPORT TO A DISKETTE

Use the File option to save on a diskette the output of a report you have just run. You can then read or import the report on another IBM or compatible computer that has a 1.44MB 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.

NOTE:
Do not use File to output the report to Stratagy's hard disk. It takes up disk space that needs to be used for voice processing.

To save a report's output to diskette:

1. Place a formatted 3.5-inch diskette in disk drive A:.

   NOTE:
   Use standard 3.5-inch 1.44MB diskettes formatted for IBM and compatibles.

2. Select File. Press:
   Alt + F

3. Stratagy prompts where you want to copy the report.
   Copy report to...

   Copy the report to disk drive a:. Valid locations are any DOS file specification including the drive specification. For example, enter something like:

   A:\REPORT.TXT

MENU AREA	FIELD	DESCRIPTION
Menu Bar (select)		
Access Options	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.
Exit Option	Esc/EXIT	Press **Esc** to exit the Reports Menu and return to the Main Menu.
Menu Identification	Reports	Menu title.
Report Definition Fields	(select to create a report definition: see the Users Menu for field definitions (Chapter 4, "Customizing User ID Mailboxes"))	

Table 7-1
Reports Menu Fields

```
Load  Save  Run  View  Print  File                      Esc/EXIT | Reports

  User ID:          1                                Security Code:
 Extension:         2
 Directory Name 1:  4            Dir Name 2:  3          Read Only:

 Basic Options                           | Chains                  Groups
     Maximum Rings:                      |  Done:                   1:
   Do Not Disturb?                       |   RNA:                   2:
      Screem Calls?                      |  Busy:                   3:
   Store Messages?       Max:       sec  | Delay:                   4:
  Copy Messages To:                      | Menus
    Message Volume:      Guests:         | 1:          2:           3:
   Curent Greeting:      Max:       sec  | 4:          5:           6:
      Busy Message?      Max:       sec  | 7:          8:           9:
 ID Call?     D/T?       Name/Ext?       |             0:

 Created:               Conn Secs:           Statistics started:
   Saved:               User Secs:                Calls:          Last:
 Messages                                     Transfers:          Last:
   Current:    5,       new (    sec)            Logins:          Last:
   Maximum:          Total:      Fax:          Notifies:          Last:
```

Figure 7-1
Reports Menu with Sample Data

```
Page 1                     Stratagy Report           Mon Aug 29 18:02:51 1994
                         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
```

Figure 7-2
Sample Report

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PROGRAMMING SECTION

CHAPTER 8
BACKUP AND FILECOPY

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Chapter 8 — Backup and Filecopy

FIGURE LIST

CHAPTER 8

BACKUP AND FILECOPY

1 INTRODUCTION

Stratagy provides two utilities that enable you to copy information off the Stratagy system PC. These are:

Backup Utility – Backing up your system regularly enables your technician to restore your system with minimal data loss if your computer system fails.

Filecopy Utility – Use the Filecopy Main Menu option to copy files to and from the computer's hard disk without shutting down the Stratagy system.

2 BACKING UP AND RESTORING THE SYSTEM

With the Stratagy Backup Utility, you can back up and restore each of the following:

Database (configuration and integration settings; User ID customizations)

Greetings (recordings)

Messages

Backing up your Stratagy system regularly enables your technician to restore your system with minimal data loss if your computer system fails (hard disk drive failure, etc.) or to restore your system to an earlier version of the database or greetings.

NOTE:
System changes and messages recorded since the last backup will be lost.

2.1 SCHEDULING BACKUPS

How often you schedule backups depends upon your company's needs. For some companies monthly backups are appropriate; others require daily backups. In addition, we recommend that you backup whenever you make changes to your system that you would not want to lose (e.g., configuration changes and User ID customizations).

We recommend scheduling backups as follows:

Database:

- Each time the Stratagy Configuration Utility is used to modify the configuration and integration settings.
- Each time User IDs are customized — added, deleted, or modified.

Greetings:

- Each time you record special User ID mailbox greetings, IVR greetings, etc.
- Periodically to back up users' greeting recordings.

Messages:

- As appropriate. Some companies back up messages; others do not.

Since Stratagy is shutdown during backups, we recommend that you schedule them when Stratagy is least busy. With the System Announcement feature of the system User ID mailbox, you can let users know when the system will be shutdown for the next backup.

2.2 USING THE STRATAGY BACKUP UTILITY

Use the Stratagy Backup Utility to backup and restore the database, greetings, and messages.

2.2.1 ACCESSING THE STRATAGY BACKUP UTILITY

1. **Shutdown Stratagy**. From the Main Menu, press:

   `Alt + S`

   NOTE:
   For detailed instructions, see Chapter 3 (Accessing and Using Stratagy), "Performing System Shutdown."

   When complete, the Stratagy Configuration Utility Menu (Figure 8-1) displays. **Only items 1 through 4 display on a Stratagy 4 system.**

```
Stratagy Configuration Utility

1. Stratagy Backup Utility
2. Stratagy System Configuration
3. Install from A: Drive
4. Toshiba Plug and Play
5. Toshiba Switch Integration
6. Other Switch Integrations
```

Figure 8-1
Stratagy Configuration Utility Menu

2. **Access the Backup Utility.** Select **1. Stratagy Backup Utility** from the Stratagy Configuration Utility Menu. Press **1** or use the arrow keys (↑ ↓) to highlight the option and press **Enter**. The Stratagy Backup Utility Menu displays. See Figure 8-2.

```
Stratagy Backup Utility

    1. Back up database
    2. Back up greetings
    3. Back up messages
```

Figure 8-2
Stratagy Backup Utility Menu

2.2.2 SELECTING THE BACKUP/RESTORE OPTIONS

Select the backup/restore options based on the following:

Back up database saves or restores the configuration and integration settings defined using the Stratagy Configuration Utility, and the User ID customizations defined from the Stratagy Main Menu.

Back up greetings saves or restores all the user greeting recordings.

Back up messages saves or restores all caller messages.

To back up or restore only the database, greetings, or messages, use the appropriate option.

To back up or restore the entire system – database, greetings, and messages, use all three options. You will need to repeat the backup/restore process three times.

To back up or restore the database plus the greeting recordings, use options 1 and 2. You will need to repeat the backup/restore process twice.

To select an option, press the option number or use the arrow keys (↑ ↓) to highlight the option and press **Enter**.

2.2.3 USING THE BACKUP UTILITY

The utility uses a series of menus. For each menu, the current selections are surrounded by pointers (▶◀). To select an option, press the highlighted letter or use the arrow keys (↑ ↓) to put pointers around the option and press **Enter**.

Once you select database, greetings, or messages, the utility displays the program information and reads the disk information. The utility then displays a series of menus.

The Function Menu displays the following options:

Backup
Restore
Compare
Configure
Quit

Select **Backup** to back up Stratagy. Proceed to "Backing Up Stratagy."

Select **Restore** to restore previous backed up files on Stratagy. Proceed to "Restoring Stratagy."

Select **Quit** to return to the Stratagy Backup Utility Menu.

Backing Up Stratagy

- The second menu displays backup information:

  backup set (files to be backed up)
  DATABASE.SET (database)
  GREETING.SET (greetings)
  MSGS.SET (messages)

  backup from (drive)

  backup to (drive)

  backup type (full or partial)

  backup information:
  number of files selected for backup
  number of floppies needed for backup
  estimated backup time

  Select **Start Backup** to start the back up. Be sure to have the number of floppies needed pre-formatted. Proceed.

  Select **Cancel** to return to the Function Menu.

- The backup utility creates a catalog and loads the backup files. The utility then prompts whether to continue or cancel the backup.

  Select **continue** to begin the backup process. Insert diskette 1 into drive A. The screen displays:

  directory tree (what part of the directory is being backed up)

  file being copied

  diskette progress (track number of diskette A the utility is copying to)

  backup set information (catalog; type; name; verify type; estimated versus actual disks, files, bytes, time)

  The utility prompts for diskettes as needed. When complete, the utility displays the Backup Function Menu (step 1).

To **cancel** backup, press **B** to return to the Function Menu.

Restoring Stratagy

- The second menu displays restore information:

  restore set (files to be restored)
  DATABASE.SET (database)
  GREETING.SET (greetings)
  MSGS.SET (messages)

  restore from (drive)

  restore to (drive)

  restore files (specific files to be restored over)

  Select **Start Restore** to start the restore.

  Select **Cancel** to return to the Function Menu.

- The restore utility creates a catalog and loads the restore files. The utility then prompts whether to continue or cancel the restore.

  Select **continue** to begin the restore process. Insert diskette 1 into drive A. The screen displays:

  directory tree (what part of the directory is being restored)

  file being copied

  diskette progress (track number of diskette A the utility is copying to)

  restore set information (catalog; type; name; verify type)

  The utility prompts for diskettes as needed. When complete, the utility displays the Function Menu.

  To **cancel** restore, press **R** to return to the Function Menu.

---

3 USING STRATAGY'S FILECOPY

With the Filecopy option of Stratagy's Main Menu, you can copy files to and from the system's hard disk without shutting down Stratagy.

To copy files:

1. From the Main Menu, select Filecopy. Press:

   Alt + F

2. Stratagy prompts:

   Password?

   Enter the password. (The default password is Stratagy, with the first letter uppercase.)

3. Stratagy asks for the source file name.

   Copy From:

   Enter the name. Include disk drive, directory, etc., as appropriate.

4. Stratagy asks for the destination file name.

   Copy To:

   Enter the name. Include disk drive, directory, etc., as appropriate.

5. Stratagy copies the file. When complete, the Main Menu displays.

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CHAPTER 9
SYSTEM ADMINISTRATOR'S USER ID

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Chapter 9 — System Administrator's User ID

CHAPTER 9

SYSTEM ADMINISTRATOR'S USER ID

1 INTRODUCTION

Stratagy has a special User ID mailbox known as the System Administrator's User ID mailbox. It is User ID 999, and you access it through the telephone just as any other User ID mailbox.

NOTE:
The System Administrator mailbox User ID 999 cannot be assigned to another User ID number.

When you access User ID mailbox 999, Stratagy gives you the same User Main Menu options as any other user plus option 8 (Access System Administration). These are:

MAIN MENU
1 **PLAY** your **MESSAGES**
3 **CHANGE** your **OPTIONS**
4 **SEND** a new **MESSAGE**
5 **MANAGE** your **LISTS**
8 **SYSTEM ADMINISTRATION**
0 **EXIT** user mode
**HANG UP**

To select a User Main Menu option, press the appropriate number or character. For details about options available to all users, see the *Stratagy User Guide.*

The special functions User ID mailbox 999 provides are:

- Manage Lists (option 5) creates system lists, not personal lists.
- The additional User Main Menu item – System Administration (option 8), which enables you to perform System Administrator User ID mailbox functions using the telephone.

2 SYSTEM LISTS

Special lists of User IDs to which everyone using Stratagy may send or forward telephone messages eliminates the need of every user to create a similar personal list. Stratagy provides system-wide lists as a special attribute of lists created in System Administrator User ID 999.

System lists are an excellent means of distributing interoffice memos and assure all personnel will receive the information on a timely basis. Examples of such lists include all users in the system, all company managers, and all users in a specific department.

Stratagy processes mail sent to mailing lists as a low priority task. Therefore, it may take several minutes to send the message to everyone on a large list, especially if the system is busy.

2.1 CREATING A SYSTEM LIST

You can create up to seven system-wide lists. To create a system list, from System Administrator User ID 999 follow the same procedure as you would for creating a personal list from any other User ID mailbox.

1. Access Stratagy from your telephone.
2. Press ✱ **9 9 9 #**.
3. Enter the System Administrator User ID mailbox's security code. The default is **9 9 9 #**.
4. The User Main Menu plays. Press **5** to Manage your lists.
5. Select the distribution list number. Valid entries are **1 ~ 7**.
6. Press **4** to Record a list comment.
7. Press **2** to Add a User ID to the list. Repeat for all User ID mailboxes you want to add to the list.
8. Press **1** to Review the current list. Verify data input accuracy. If not accurate:
   - Press **2** to Add a User ID to the list.
   - Press **3** to Delete a User ID from the list.
9. When the list is accurate, press **9** to Return to the Select a List Menu. You can create another System List or return to the User Main Menu.

Once defined, you can easily add or delete User IDs as needed, as indicated in step 8 above.

2.2 SENDING A MESSAGE USING A SYSTEM LIST

Each list, 1 through 7, in User ID 999 is available to all users and may be accessed when a user sends or forwards a message to a list. For a user to select a system list rather than his personal list, he enters a ✱ followed by the system list number when entering the list destination. For example, for a user to select personal list 3, he would enter **3**. For a user to select system list 3, he would enter ✱ **3**.

The procedure is as follows:

1. Access Stratagy from your telephone,
2. Press ✱ + *your mailbox number* + **#**
3. Enter *your security code.*
4. The User Main Menu plays. Press **4** to Send a new message.

5. The Send a New Message Menu plays. Press **4** to Select a list destination.
6. Enter ✱ + *distribution list number (1 ~ 7).*
7. Press **2** to Record your message.
8. Press **9** to return to the Send a New Message Menu.
9. Press **3** to Send your message.
10. Exit to the User Main Menu.
    - Press **9** to return to the Send a New Message Menu.
    - Press **9** to return to the User Main Menu.

3 SYSTEM ADMINISTRATION (OPTION 8)

When you select the User Main Menu option 8 (Access System Administration), Stratagy plays the available selections:

SYSTEM ADMINISTRATION MENU
1 **RECORD** system announcement
2 **DELETE** system announcement
3 **RECORD** busy-hold music
4 **MANAGE** User IDs
✱ **REVIEW** system status
9 **RETURN** to previous menu

To select a System Administration menu item, press the appropriate number or character.

3.1 1 – RECORD THE SYSTEM ANNOUNCEMENT

System announcements are useful in disseminating system-wide information. With this option, you can record an announcement that Stratagy will play to every user when he accesses his mailbox.

Users can interrupt the system announcement by selecting from the User Main Menu during playback. However, the announcement will play each time the user accesses his mailbox until it has completely played. Once played in its entirety, Stratagy deletes the announcement from the user's mailbox.

3.2 2 – DELETE THE SYSTEM ANNOUNCEMENT

With this option, you can purge a previously recorded system announcement from the system.

3.3 3 – RECORD THE BUSY-HOLD MUSIC

The busy-hold music is heard by callers when they elect to hold for a busy extension by pressing ✱. Stratagy plays the entire recording before re-trying the busy extension.

When the system is delivered, it plays approximately 30 seconds of music. You can replace this music recording with a recording giving information about your company or its products and services. We recommend that you prepare a professional recording.

There are two methods of recording the busy-hold music:

- **Telephone Handset** – Use the telephone to record a script about your company or its products and services.
- **Music Source Adapter Unit** – This unit allows you to connect a music source to a standard RCA jack which is adapted to plug into a 4-port voice boarded installed in Stratagy.

3.4 4 – MANAGE USER IDS

Manage User IDs allows you to perform special User ID functions.

Stratagy prompts:

Enter the User ID. Finish by pressing the **#** sign.

Enter the User ID. Stratagy the plays the available selections:

USER ID MENU
1 **LOCK** User ID
2 **UNLOCK** User ID
3 **RESET** User ID

1 – **Lock User ID** – Prohibits user access to the mailbox. The letter L prefaces the Security Code.

2 – **Unlock User ID** – Unlocks a locked User ID. Removes the L prefacing the Security Code.

3 – **Reset User ID** – Resets the user statistics to 0. Returns various User ID mailbox options to the default values.

3.5 ✱ – REVIEW SYSTEM STATUS

Stratagy plays (verbally) information about its status, including disk space, port usage, and system date and time.

3.6 9 – RETURN TO THE PREVIOUS MENU

Press **9** to return to the User Main Menu.

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CUSTOMIZATION FORMS

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Appendix A — Customization Forms

FORMS

APPENDIX A
CUSTOMIZATION FORMS

1 INTRODUCTION

This appendix contains forms that simplify the customization process. The forms are:

Users Form	Use for the Users Menu to define each User ID mailbox.
Auto (Scheduling) Form	Use for the Auto Menu to set up automatic changes for each User ID mailbox.
Notify Form	Use for the Notify Menu to program Stratagy to automatically call a user to notify him of messages.
Greeting Scripts Form	Use for recording greetings to write the scripts to record when accessing the User ID in User Mode via telephone.

NOTE:
Do not use the original forms; make copies as needed.

For detailed information about completing the forms, see the following:

Chapter 4	Customizing User ID Mailboxes
Chapter 5	Special Greeting User ID Mailboxes
Chapter 6	Token Programming Language
Appendix B	Customization Examples

2 USING THE FORMS

Use the forms when initially customizing Stratagy or when modifying an existing Stratagy system.

Example 1

If you are initially customizing User ID 2305, which does not need automatic changes or notifications, you would use the Users Form.

Example 2

If you are initially customizing Stratagy to notify User ID 405 via his digital pager, you would use both the Users Form and the Notify Form. If you are modifying User ID 405, you might only need the Notify form.

Example 3

If you are modifying an emergency list that notifies three people, you would use three records on the Notify form.

Example 4

If you are initially customizing Stratagy so that your company has different greetings for mornings, afternoons, and evenings/weekends, you would use the Users Form, Auto Form, and the Greeting Scripts Form.

USERS FORM

Copy as needed.

User ID: _____ Comment _____ Security Code: _____
Extension: _____
Dir Name 1: _____ Dir Name 2: _____ Read Only:

Basic Options
Maximum Rings: _____ (default is 4)
Do Not Disturb: _____ Lock: _____
Screem Calls? _____ Lock: _____
Store Messages? _____ Max: _____ sec
Copy Messages To: _____
Message Volume: _____ Guests: _____
Curent Greeting: _____ Max: _____ sec
Busy Message? _____ Max: _____ sec
ID Call? _____ D/T? _____ Name/Ext? _____

Chains
Done: _____
RNA: _____
Busy: _____
Delay: _____

Groups
1: _____
2: _____
3: _____
4: _____

Menus
1: _____ 2: _____ 3: _____
4: _____ 5: _____ 6: _____
7: _____ 8: _____ 9: _____
0: _____

Does this User ID also have:

AUTO FORM: YES _____ NO _____
NOTIFY FORM: YES _____ NO _____
GREETING SCRIPTS FORM: YES _____ NO _____

AUTO (SCHEDULING) FORM

Copy as needed.

User ID ___________

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 #: ____

NOTIFY FORM

Copy as needed.

User ID ___________

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: ____

GREETING SCRIPTS FORM

Copy as needed.

User ID _____

Greeting 1	
Greeting 2	
Greeting 3	
Greeting 4	
Greeting 5	
Greeting 6	
Greeting 7	

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APPENDIX B
CUSTOMIZATION EXAMPLES

1 INTRODUCTION

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, guest defaults, and fax tone detect. In addition, User IDs 7000 ~ 7014 provide pre-programmed fax features that can be copied and used for defining User ID records. Notify contains templates (e.g., message waiting light control and pagers) you can use for defining User ID Notify records.

This appendix provides examples of some of Stratagy's capabilities. Each example provides detailed information, including the assumptions, programming, and how it works. For examples that use the Token Programming Language, each token is defined.

Note that all the capabilities are available for the Stratagy 24, fax is not available for the Stratagy 4 and 6, and serial access is not available for the Stratagy 4.

The examples are grouped by menu.

Users Menu examples:

- Fax back
- Confirming the number of digits entered by a caller
- Confirming digits entered by a caller
- Using a status User ID to check message count for multiple User IDs
- System paging of a user for special callers
- Switching and maintaining languages
- Order shipment information

Notify Menu examples:

- Message waiting light control when light on and off codes differ
- Message waiting light control when light on and off codes are the same
- Voice notification
- Notification to a pager
- Relay paging to a pager
- Emergency lists

Auto (Scheduling) Menu examples:

- Time of day greetings
- Holiday greetings – same day each year
- Holiday greetings – different day each year
- Extension change
- Unsupervised conferencing

2 USERS MENU EXAMPLES

The examples below provide information on programming:

- Fax back
- Confirming the number of digits entered by a caller
- Confirming digits entered by a caller
- Using a status User ID to check message counts for multiple User IDs
- System paging of a user for special callers
- Switching and maintaining languages
- Order shipment information

2.1 FAX BACK

Here is an example of a simple fax back program. When a caller enters the fax information User ID, you want to ask his fax number, then fax a document to that number.

2.1.1 THE ASSUMPTIONS

For this example, the assumptions are:

fax information User ID: 800

fax file name: \faxes\fax1.dcx

dial 9 for an outside line

2.1.2 THE PROGRAMMING

Customize User ID 800 by defining the Users record and recording the greeting.

Define the Users record to contain:

Extension: @R(G1,%S1)T(\faxes\fax1.dcx,"9,%S1")

Access User Mode via telephone. Record:

greeting 1: "Please enter your fax phone number, followed by the pound sign."

The *Extension* field breaks down as follows:

@	Suppress normal process.
R(G1,%S1)	Play greeting 1. Wait for the caller to enter a phone (fax) number. Read the DTMF the caller entered (excluding the terminating #) into variable %S1.
T(\faxes\fax1.dcx,"9,%S1")	Fax the document to the phone number. \faxes\fax1.dcx: name of the file to fax 9: dial 9 for an outside line ,: pause for 2 seconds %S1: dial the DTMF the caller entered

EF01

2.1.3 HOW IT WORKS

When a caller accesses fax information User ID 800, Stratagy prompts the caller to enter his fax number, then attempts to fax the document to that phone number.

2.2 CONFIRMING THE NUMBER OF DIGITS ENTERED BY A CALLER

To make the fax back example a little more complicated, suppose you also want to check that the entered phone number is exactly seven digits long – to avoid short (bad) phone numbers and to avoid making long distance toll calls.

2.2.1 THE ASSUMPTIONS

In addition to the assumptions for the "fax back" example, assume:

"incorrect length" information User ID: 801

2.2.2 THE PROGRAMMING

In this case, define the Users record to contain:

Extension: @R(G1,%S1)I(LEN[%S1],!,"7",801)
T(\faxes\fax1.dcx,"9,%S1")

The additional token in the *Extension* field breaks down as follows:

I(LEN[%S1],!,"7",801)	I: If statement for conditional transfer of control. Compares two strings. LEN[%S1]: value of the first string (%S1) is the length of the first string (%S1), i.e., the number of digits entered by the caller. !: test for the string not being equal. 7: the value of the second string is the constant 7. 801: User ID Stratagy goes to if the two strings are not equal. **If not equal**, Stratagy goes to User ID 801. This is an information User ID that contains a greeting informing the caller that the length of the entered phone number is not what is expected. User ID 801's Done chain might point back to User ID 800 to give the caller another chance to enter the phone number correctly. **If equal**, Stratagy proceeds with the next token.

EF02

2.2.3 HOW IT WORKS

This variation does the following:

1. Computes the length of string %S1 (how many digits were entered by the caller).
2. Compares that value with the constant string 7. If not equal, Stratagy jumps to User ID 801 (information User ID).
3. If the length of string %S1 equals the constant 7, Stratagy proceeds to the next token. In this case, attempts to fax the document to the phone number.

2.3 CONFIRMING DIGITS ENTERED BY A CALLER

Suppose that in the previous example, instead of testing whether the caller entered exactly seven digits, you want to play the entered digits back to the caller and have him confirm that the number is correct.

2.3.1 THE ASSUMPTIONS

In this example, assume:

"enter fax number" information User ID: 1000

fax file name: fax.dcx

dial 9 for an outside line

2.3.2 THE PROGRAMMING

Customize User ID 1000 by defining the Users record and recording the greetings.

Define the Users record to contain:

Extension: @R(G1,%S1)P(G2)P(%S1) R(G3,%S2)I(%S2,!,"1",1000)T(fax.dcx,%S1)

Access User Mode via telephone. Record:

greeting 1: "Please enter your fax phone number."

greeting 2: "You entered..."

greeting 3: "If this is correct, please enter 1 now. Otherwise, enter 2."

The *Extension* field breaks down as follows

@	Suppress normal process.
R(G1,%S1)	Play greeting 1. Wait for the caller to enter a phone number. Read the DTMF the caller entered (excluding the terminating #) into variable %S1.
P(G2)	Play greeting 2 for this User ID.
P(%S1)	Say verbally the DTMF digits in variable %S1 (the phone number the caller entered).
R(G3,%S2)	Play greeting 3. Wait for the caller to enter a 1 or 2. read the DTMF the caller entered (excluding the terminating #) into variable %S2.
I(%S2,!,"1",1000)	I: If statement for conditional transfer of control. Compares two strings. %S2: the first string – the contents of variable %S2 (the fax number the caller entered). !: test for the string not being equal to.
I(%S2,!,"1",1000)	1: value of the second string is the constant 1. 1000: User ID Stratagy goes to if the two strings are not equal. **Not equal.** If the value in %S2 does not equal 1, loop back to the beginning of User ID 1000. **Equal.** Proceed to the next token.
T(fax.dcx,"9,%S1")	Fax the document to the phone number. fax.dcx: name of the file to fax. 9: dial 9 for an outside line. ,: pause for 2 seconds. %S1: dial the DTMF the caller entered for the fax number.

EF03/4

EF04

2.3.3 HOW IT WORKS

Stratagy does the following:

1. Prompts the caller for a fax phone number, and reads it into variable %S1.
2. Plays "You entered" followed by the number just entered in %S1.
3. Prompts the caller to enter 1 or 2. If the caller does not enter 1, loops back to the beginning of this User ID and start over with step 1.
4. If the caller entered 1, Stratagy attempts to send the fax to the phone number the caller entered.

2.4 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 which he 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(G*n*)** will play greeting *n* for the current User ID or **P(M)** will play the number of 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 which will tell the number of messages waiting in several other User IDs.

2.4.1 THE ASSUMPTIONS

In this example, assume:

message User IDs: 1000, 2000, 3000

status User ID: 9999

2.4.2 THE PROGRAMMING

For User ID 9999, define the Users record to contain:

Extension: @P(U,1000)P(M,1000)P(U,2000) P(M,2000)P(U,3000)P(M,3000)

The *Extension* field breaks down as follows:

@	Suppress normal process.
P(U,1000)	Play the "name and extension" recording for User ID 1000. If no recording exists, say the User ID number.
P(M,1000)	Say the total number of messages and number of new messages for User ID 1000.
P(U,2000)	Play the "name and extension" recording for User ID 2000. If no recording exists, say the User ID number.
P(M,2000)	Say the total number of messages and number of new messages for User ID 2000.
P(U,3000)	Play the "name and extension" recording for User ID 3000. If no recording exists, say the User ID number.
P(M,3000)	Say the total number of messages and number of new messages for User ID 3000.

EP05

2.4.3 HOW IT WORKS

For each of the three User IDs, the name and extension associated with the User ID plays followed by the number of messages waiting for that User ID.

2.5 SYSTEM PAGING OF A USER FOR SPECIAL CALLERS

Perhaps you would like to create a special User ID for family, friends, or special customers that, when accessed, pages you over the telephone paging system in your office, lets you know that you have an important call, and then transfers 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.

2.5.1 THE ASSUMPTIONS

For this example, the assumptions are:

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-

2.5.2 THE PROGRAMMING

Customize User ID 5222 by defining the Users record and recording the greeting.

Define the Users record to contain:

Extension: 33*P(G1)F-G(6222)

Access User Mode via telephone. Record:

greeting 1: "There is an important call for David."

The *Extension* field breaks down as follows:

33*	Telephone system's paging access code. (The code varies depending upon the telephone system.)
P(G1)	Play greeting 1 for this User ID.
F-	Perform a hook-flash and pause for .5 seconds. (Some telephone systems require F-F to return to a caller placed on transfer hold.)
G(6222)	Go to the User ID 6222.

EP06

2.5.3 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 hook-flash 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.

2.6 SWITCHING AND MAINTAINING LANGUAGES

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 allow 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 Greeting User ID (default is User ID 990). After playing the greeting, processing continues (by default) with the Instruction User ID (default is User ID 991), which plays the caller instructions. During either the Greeting or 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 to have callers always remain accessing the proper language Instruction User ID, you can program Stratagy to perform the following:

1. If an French is selected, remember the language selected.
2. Before playing the default Instruction User ID (991), determine which language Instruction User ID should play.

2.6.1 THE ASSUMPTIONS

The assumptions are:

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: Greeting User ID (default); English and contains the choice to select French

User ID 991: default Instruction User ID (English)

User ID 980: assigns French as the language selected

User ID 981: French Instruction User ID

User ID 992: determines which language Instruction User ID should play

2.6.2 THE PROGRAMMING

For Greeting User ID 990:

Define the Users record to contain:

Menu 1: 980 (if the caller selects 1, Stratagy transfers him to User ID 980)

Done chain: 991 (default)

Access User Mode 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."

For Instruction User ID 991, access User Mode via telephone. Record:

greeting 1: "To reach the person you are calling, enter his extension. For information..."

For User ID 980, define the Users record to contain:

Extension: @L(FRENCH) =(%S1,"FRENCH")G(981)

The *Extension* field breaks down as follows:

@	Suppress normal process.
L(FRENCH)	Switch the system prompts to the file FRENCH.IDX in the C:\STRATAGY directory.
=(%S1, "FRENCH")	Assign %S1 the value of "FRENCH".
G(981)	Go to User ID 981.

EF14

For Greeting User ID 981, access User Mode via Telephone. Record:

greeting 1: [In French] "To reach the person you care calling, enter his extension. For information..."

For User ID 992, Define the Users record to contain:

Extension: @I(%S1,=,"FRENCH",981)G(991)

The *Extension* field breaks down as follows:

@	Suppress normal process.
I(%S1,=,"FRENCH", 981)	If S1 equals "FRENCH", go to User ID 981.
G(991)	Go to User ID 991.

EF15

2.6.3 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 B-1 diagrams how switching and maintaining languages works for this example. When Stratagy answers the call, Greeting User ID 990 plays and offers the caller the choice of selecting French.

If the caller does not select French:

- Stratagy processes User ID 992 which determines that French is not being used (%S1 does not have the value "FRENCH").
- Stratagy plays the English Instruction User ID 991.

If the caller selects French:

- Stratagy processes User ID 980, which assigns %S1 the value "FRENCH".
- Stratagy plays the French Instruction User ID 981.
- Stratagy determines if the User ID is valid.

  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 Instruction User ID 981.

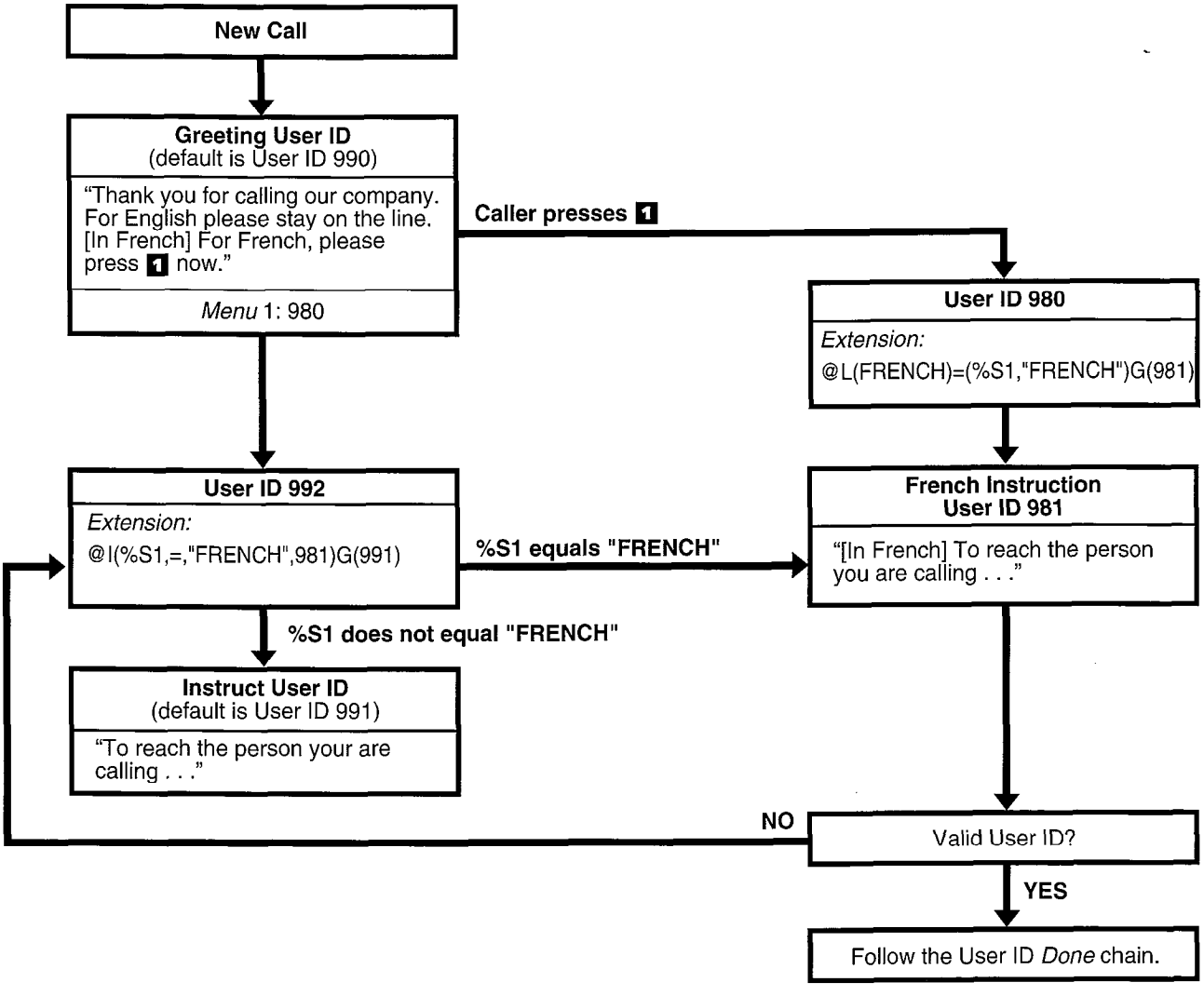

Figure B-1
Switching and Maintaining Languages

2.7 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, S( ) token), accessing a file on Stratagy's hard disk, 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.

2.7.1 THE ASSUMPTIONS

The Stratagy system's hard disk 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:

11111,06301994
22222,070111994
33333,07061994
12345,07121994

2.7.2 THE PROGRAMMING

For User ID 2000:

Define the Users record to contain:

Extension: R(G1,%S1,20)
I(LEN[%S1],!,5,2001)G(2002)

Access User Mode via telephone. Record:

greeting 1: "Please enter the five digit order number now."

The *Extension* field breaks down as follows:

R(G1,%S1,20)	Play greeting 1. Wait for the caller to enter a phone number. Read the DTMF the caller entered into variable %S1. Wait 20/10 or 2 seconds for DTMF.
I(LEN[%S1],!,5, 2001)	If the length of variable %S1 does not equal 5, go to User ID 2001.
G(2002)	Go to User ID 2002.

EF16

For User ID 2001, access User Mode via telephone. Record:

greeting 1: "Your order number must be five digits. Goodbye."

For User ID 2002:

Define the Users record to contain:

Extension: ?(%S1,SHIPPED,2003)P(G1)

Access User Mode via telephone. Record:

greeting 1: "Sorry, but your order has not yet shipped. Please call back tomorrow."

The *Extension* field breaks down as follows:

?(%S1, SHIPPED,2003)	If variable %S1 exists in the file, go to User ID 2003.
P(G1)	Play greeting 1.

EF17

For User ID 2003:

Define the Users record to contain:

Extension: V(SHIPDATE,1,%S1,2,%S2)
P(G1)P(%S2,D)

Access User Mode via telephone. Record:

greeting 1: "Your order was shipped on."

The *Extension* field breaks down as follows:

V(SHIPDATE,1, %S1,2,%S2)	In file SHIPDATE, search field 1 for variable %S1. Store field 2 in variable %S2.
P(G1)	Play greeting 1.
P(%S2,D)	Play the DTMF digits represented by the variable %S2 as a date.

EF18

2.7.3 HOW IT WORKS

The order shipment examples works as follows.

Stratagy:

1. Asks the caller to enter the order number.
2. Determines if the order number is 5 digits long.
   - If not, says "Your order number must be five digits. Goodbye."
   - If 5 digits long, Stratagy continues.
3. Determines if the order number has shipped.
   - If not, plays "Sorry, but your order has not yet shipped. Please call back tomorrow."
   - If shipped, plays "Your order was shipped on" and the date of shipment.

For example, if the caller entered order number 12345, Stratagy would play "Your order was shipped on July twelfth, nineteen ninety-four."

3 NOTIFY MENU EXAMPLES

The examples below provide information on programming:

- Message waiting light control when light on and off codes differ
- Message waiting light control when light on and off codes are the same
- Voice notification
- Notification to a pager
- Relay paging to a pager
- Emergency lists

3.1 MESSAGE WAITING LIGHT CONTROL WHEN LIGHT ON AND OFF CODES DIFFER

Some telephone systems support message waiting lights which 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.

3.1.1 THE ASSUMPTIONS

The assumptions are:

code for turning on the message waiting light: #90

code for turning off the message waiting light: #91

3.1.2 THE PROGRAMMING

For turning on the light, define the Notify record to contain:

Type: NORMAL
Method: #90%E

For turning off the light, define the Notify record to contain:

Type: PICKUP
Method: #91%E

The *Method* field breaks down as follows:

#90	Turn on the message waiting light. (The code varies depending upon the telephone system.)
# 91	Turning off the message waiting light. (The code varies depending upon the telephone system.)
%E	Dial the DTMF digits given in the User ID's Extension field.

EFO7

3.1.3 HOW IT WORKS

If your telephone system uses different codes for turning on and off the message light, Stratagy:

- Turns on the light at the extension defined by the Users record Extension field
- Turns off the light at the extension defined by the User ID's Extension field

3.2 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 off the message waiting light (i.e. it 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 would perform the light on code regardless of whether the light was already on. Therefore, for the first new message, Stratagy would turn the light on, but on the second new message, if the user has not picked up the first new message, Stratagy would turn the light off since it was already on!

To solve this problem, tell Stratagy to do the following:

For turning on the light:

1. Check if you have already turned on the light (Z). If you have, stop, otherwise continue to step 2.
2. Turn on the light and remember that you have turned it on (X).

For turning off the light:

- Turn off the light and forget that you had turned it on (Y).

3.2.1 THE ASSUMPTIONS

Assume the following:

code for turning on/off the message waiting light: 60

3.2.2 THE PROGRAMMING

For turning on the light, define the Notify record to contain:

Type: NORMAL
Method: Z#60%EX

For turning off the light, define the Notify record to contain:

Type: PICKUP
Method: #60%EY

The *Method* field breaks down as follows:

#60	Turn on/off the message waiting light. (The code varies depending upon the telephone system.)
X	Create the LIGHT.ON file in the User ID's directory.
Y	Delete the LIGHT.ON file in the User ID's directory.
Z	Test for existence of LIGHT.ON file in the User ID's directory. If exists, stop processing the string.
%E	Dial the DTMF digits in the User ID's Extension field.

EFO8

3.2.3 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.

3.3 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.

3.3.1 THE ASSUMPTIONS

Assume the following:

User ID: 405

"name and extension recording": Ken, Extension 405

number of new messages in User ID mailbox 405: 3

3.3.2 THE PROGRAMMING

Define the Notify record to contain:

Title: Voice - Number of Messages
Type: NORMAL
Method: %EW(3,V)P(U)P(M)

The Method field breaks down as follows:

%E	Dial the DTMF digits in the User ID's Extension field. This should be the user's phone number.
W(3,V)	Wait up to 3 rings for a voice to answer.
P(U)	Play the "name and extension" recording for the current User ID. If there is no recording, say the User ID digits.
P(M)	Play the total number of messages and number of new messages for the current User ID.

EP09

3.3.3 HOW IT WORKS

Per the notification schedule, Stratagy:

1. Dials the user's phone number.
2. Waits for a voice to answer.
3. Says the user's recorded "name and extension": "Ken, extension 405."
4. Says the user's number of new messages: "3."

3.4 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.

3.4.1 THE ASSUMPTIONS

Assume the following:

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

3.4.2 THE PROGRAMMING

Define the Notify record to contain:

Title: Pager - Number of Total and New Messages
Type: NORMAL
Method: 9W(4,T)%V,,W(2,P)-%U%M%
%N#-
Variable: <digital pager's phone number>

The *Method* field breaks down as follows:

9,	Dial 9 for an outside line.
W(4,T)	Wait up to 4 seconds to hear dial tone.
%V	Dial the contents of the Notify record's Variable field. This should be the digital pager's phone number.
,	Pause 4 seconds (2 seconds + 2 seconds)
W(2,P)	Wait up to 2 rings for the pager/beeper to answer.
-	Pause .5 second to allow for the pager's answer confirmation tones.
%U	Relay the User ID.
*	Dial *. (Used by many paging systems to designate a "-" in the pager display.)
%M	Relay the total number of messages in this User ID mailbox.
*	Dial *. (Used by many paging systems to designate a "-" in the pager display.)
%N	Relay the number of new messages in this User ID mailbox.
#	Dial # to end call.
-	Pause .5 second.

EP1011

3.4.3 HOW IT WORKS

Per the notification schedule, Stratagy:

1. Dials the user's digital pager's phone 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.

3.5 RELAY PAGING TO A PAGER

With relay paging, the caller enters his number on the telephone dial pad and Stratagy notifies the user by relaying the caller's phone number to the user's pager

display. A caller can page without redialing, or even knowing, the user's pager number.

3.5.1 THE ASSUMPTIONS

Assume the following:

dial 9 for an outside line

the paging system uses the * to designate a "-" in the pager display

User ID: 2765

caller's phone number: 583-3700

to activate relay paging, the caller presses **#** when the User ID's greeting plays

3.5.2 THE PROGRAMMING

Define the Notify record to contain:

Title: Relay Page
Type: RELAY
Method: 9W(4,T)%V,,W(2,P)-%U%R#-
Variable: <digital pager's phone number>

The *Method* field breaks down as follows:

9	Dial 9 for an outside line.
W(4,T)	Wait up to 4 seconds to hear dial tone.
%V	Dial the contents of the Notify record's Variable field. This should be the digital pager's phone number.
,,	Pause 4 seconds (2 seconds + 2 seconds)
W(2,P)	Wait up to 2 rings for the pager/beeper to answer.
-	Pause .5 second to allow for the pager's answer confirmation tones.
%U	Relay the User ID.
*	Dial *. (Used by many paging systems to designate a "-" in the pager display.)
%R	Relay the DTMF digits entered by the caller. This should be the caller's phone number.
#	Dial # to end call.
-	Pause .5 second.

EP-12

3.5.3 HOW IT WORKS

Per the notification schedule, Stratagy:

1. Dials the user's digital pager's phone number.
2. When the pager answers:
   - Relays the User ID.
   - Relays the caller's phone number.

For this example, the following displays on the pager: 2765-5833700.

3.6 EMERGENCY LISTS

In an emergency list, Stratagy notifies one person of a new message first, then after a time interval notifies a second person if the first person has not picked up the message, and after another time interval notifies a third person if the message has not been picked up, and so on.

When creating an emergency list, carefully define the initial time to wait before starting the notification and the repeat time.

3.6.1 THE ASSUMPTIONS

Assume that you want to create three Notify records for one User ID. Each record contains a different phone number to call; one for each of the three people who will potentially be notified.

3.6.2 THE PROGRAMMING

Define the first Notify record to contain:

Notify After: 0
Continue Every: 5
Max Times: 0

Define the second Notify record to contain:

Notify After: 15
Continue Every: 5
Max Times: 0

Define the third Notify record to contain:

Notify After: 30
Continue Every: 5
Max Times: 0

3.6.3 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.

4 AUTO MENU EXAMPLES

You can program Stratagy to have different Company Greetings depending upon the time of day, the day of the week, etc.

Stratagy starts calls in User ID 990 (default value for the company greeting mailbox) and then follows the chain to User ID 991 (default value for the caller instructions mailbox).

The examples are:

- Time of day greetings
- Holiday greetings – same day each year
- Holiday greetings – different day each year
- Extension change
- Unsupervised conferencing

4.1 TIME OF DAY GREETINGS

You can program Stratagy so that your company has different greetings for mornings, afternoons, and evenings/weekends.

4.1.1 THE ASSUMPTIONS

For this 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

4.1.2 THE PROGRAMMING

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:

Enable: YES

Change On (date)*:* 08/15/94
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:

Enable: YES

Change On (date)*:* 08/15/94
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:

Enable: YES

Change On (date)*:* 08/15/94
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:

Enable: YES

Change On (date)*:* 08/15/94
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 User Mode via telephone. Record:

greeting 1: "Thank you for calling..."
greeting 2: "Good morning. Thank you for calling..."
greeting 3: "Good afternoon. Thank you for calling..."

4.1.3 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).

4.2 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 the same day each year.

To inform callers that your offices are closed for the holiday, you can record a greeting that plays only on the holiday.

4.2.1 THE ASSUMPTIONS

For this 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

4.2.2 THE PROGRAMMING

Scheduling the Christmas greeting includes defining the Auto record and recording the greeting for User ID 991.

Define the Auto record as follows:

Enable: YES
Change On (date): 12/25/94
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

Access User Mode 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."

4.2.3 HOW IT WORKS

Every year 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 will program the holiday schedule after the open greeting schedule, the holiday schedule starting time was scheduled one minute after the regular open greeting schedule.

4.3 HOLIDAY GREETINGS – DIFFERENT DAY EACH YEAR

Certain holidays, such as Thanksgiving and Labor Day, occur on same 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.

4.3.1 THE ASSUMPTIONS

For this 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

4.3.2 THE PROGRAMMING

Scheduling the Thanksgiving greeting includes defining the Auto record and recording the greeting for User ID 991.

Define the Auto record as follows:

Enable: YES

Change On (date)*:* 11/24/94
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

Access User Mode 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."

4.3.3 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 will program 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.*

4.4 EXTENSION CHANGE

With Stratagy, you can program a different phone number for a user for a particular day of the week, time of day, etc. You can use the Auto record's *Extension* field to define the different phone number. Normally, Stratagy processes calls to the Users Menu *Extension* field. When the 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.

4.4.1 THE ASSUMPTIONS

The assumptions are:

user's extension (User ID): 6340

Friday's office phone number: 3700

4.4.2 THE PROGRAMMING

Define the Auto record as follows:

Enable: YES

Change On (date)*:* 08/09/94 (current date)
Change At (time)*:* 08:00 *(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)

4.4.3 HOW IT WORKS

Every Friday after 8:00 a.m., if a caller access User ID 6340, Stratagy directs the call to extension 3700.

4.5 UNSUPERVISED CONFERENCING

If your telephone system supports unsupervised conferencing, you can schedule Stratagy to call an off premise location for the conference call.

4.5.1 THE ASSUMPTIONS

In this example, the assumptions are:

conference code : *3

operation required to connect to calls in a conference: F-F-

phone number: 583-3700

dial 9 for an outside line

4.5.2 THE PROGRAMMING

Define the Auto record to contain:

Extension: 3-9W(2,T)583-3700W(3,V)F-F-H

The *Extension* field breaks down as follows:

*3	Conference code. (The code varies depending upon the telephone system.)
-	Pause for a half (.5) second.
9	Dial 9 for an outside line.
W(2,T)	Wait up to 2 seconds to hear dial tone.
583-3700	Dial the phone number 583-3700.
W(3,V)	Wait up to 3 rings for a voice to answer.
F-F-	Hook-flash and pause for a half second. Hook-flash and pause for a half second. (The code varies depending upon the telephone system.)
H	Hang up immediately.

EF13

4.5.3 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.

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MAINTENANCE AND UPGRADES SECTION

Stratagy™ 4/6/24

MAINTENANCE AND UPGRADES SECTION

CHAPTER 1
MAINTAINING THE SYSTEM

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Chapter 1 — Maintaining the System

CHAPTER 1
MAINTAINING THE SYSTEM

1 INTRODUCTION

Maintaining Stratagy involves:

- Backing up and restoring the Stratagy system
- Hard disk maintenance
- Tracking the Stratagy system
- Removing and replacing components

2 BACKING UP AND RESTORING THE STRATAGY SYSTEM

With the Stratagy Backup Utility, you can back up and restore each of the following:

database (configuration and integration settings; User ID customizations)

greetings (recordings)

messages

Backing up your Stratagy system regularly enables you to restore your system with minimal data loss if your computer system fails (hard disk drive failure, etc.) or to restore your system to an earlier version of the database or greetings.

NOTE:
System changes and messages recorded since the last backup will be lost.

2.1 SCHEDULING BACKUPS

How often you schedule backups depends upon your company's needs. For some companies monthly backups are appropriate; others require daily backups. In addition, we recommend that you backup whenever you make changes to your system that you would not want to lose (e.g., configuration changes and User ID customizations).

We recommend scheduling backups as follows:

Database:

- Each time the Stratagy Configuration Utility is used to modify the configuration and integration settings
- Each time User IDs are customized — added, deleted, or modified

Greetings:

- Each time you record special User ID mailbox greetings, IVR greetings, etc.
- Periodically to back up users' greeting recordings

Messages:

- As appropriate. Some companies back up messages; others do not.

Since Stratagy is shut down during backups, we recommend that you schedule them when Stratagy is least busy. With the System Announcement feature of the system User ID mailbox, you can let users know when the system will be shutdown for the next backup.

2.2 USING THE STRATAGY BACKUP UTILITY

Use the Stratagy Backup Utility to backup or restore the database, greetings, and messages. For the procedures, see the Installation section, Chapter 5, "Configuring and Backing Up Stratagy."

3 HARD DISK MAINTENANCE

Stratagy automatically performs hard disk maintenance during **scheduled** shutdown (but not during normal shutdown). The default schedule is Tuesday at 1:30 a.m., which may not be the schedule for your Stratagy system. The *shutdown* field of the Main Menu displays the date and time of the next scheduled shutdown. If you need to set the Stratagy System Configuration *shutdown* parameter, see the Stratagy Configuration Utility information in the Installaton section, Chapter 5, "Configuring and Backing Up Stratagy."

IMPORTANT NOTE:
If you do not want Stratagy to automatically perform scheduled shutdown, set the shutdown parameter to perform shutdown when you want the scheduled shutdown to occur. After Stratagy performs the scheduled shutdown, re-comment out (place a # in front of) the parameter. We recommend performing scheduled shutdown at least weekly.

During scheduled shutdown, Stratagy:

- Checks the hard disk for lost files or anything unusual. Automatically fixes any errors.
- Optimizes the hard disk: reassembles each fragmented file into one piece and moves the files so there are no "holes" between them. Unoptimized disks take longer to process files.

4 TRACKING THE STRATAGY SYSTEM

Tracking the Stratagy system involves analyzing system operation and User ID activity. This section discusses:

- Stratagy Main Menu and Users Menu information
- Stratagy log information

4.1 MAIN MENU AND USERS MENU INFORMATION

To track system operation, viewing the system activity statistics of the Main Menu provides information about:

- Port activity and CPU usage
- Number of defined User ID mailboxes
- Available disk space in time and percent of the disk
- Number of calls answered since the system started
- Notify activity
- Date and time system last started
- Next date and time of scheduled shutdown
- Fax port activity

For details, see the Programming section, Chapter 3, "Accessing and Using Stratagy," "Using the Main Menu."

To track User ID activity, viewing the User ID statistics of the Users Menu or generating a report based on these statistics, provides information about:

- 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

For details, see the Programming section, Chapter 4, "Customizing User ID Mailboxes," "Using the Users Menu."

4.2 STRATAGY LOG INFORMATION

If you need more system operation or User ID information, Stratagy provides the following logs. Use the Stratagy System Configuration option of the Stratagy Configuration Utility to define whether the log is active (not commented out) and its filename. See the Installation section, Chapter 5, "Configuring and Backing Up Stratagy" for details.

Stratagy log. Logs startup information, execution error information, system actions, and shutdown information.

Parameter: *lognam.*
Default activity: active.
Default name: Stratagy.LOG.

NOTE:
This file keeps growing slowly. Periodically archive or delete it once or twice a year.

Message log. Logs every received message and every User ID that checks for messages along with the DTMF entered.

Parameter: *msg_log.*
Default activity: inactive.
Default name: MSG.LOG.

NOTE:
When active, grows quickly. Archive or delete frequently.

User ID log. 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.

Parameter: *user_log.*
Default activity: inactive.
Default name: USERID.LOG.

NOTE:
When active, grows quickly. Archive or delete frequently.

5 REMOVING AND REPLACING COMPONENTS

Before removing and replacing components, you need to know:

- How to **safely** open a personal computer and install/remove cards in the computer.
- How to identify basic components of a personal computer: e.g., motherboard, video board, controller board, voice board, disk drives, power supply, cables, etc.

This section discusses:

- Stratagy voice board code and *activation key_number.*
- Procedures for removing and replacing Stratagy system hardware components.

5.1 STRATAGY VOICE BOARD CODE AND ACTIVATION KEY_NUMBER

Only Stratagy voice boards can be used in a Stratagy system. In addition, each Stratagy system has a unique activation key_number that matches the Stratagy system software to a specific Stratagy voice board.

IMPORTANT NOTE:
Use only Stratagy voice boards supplied by Toshiba in your Stratagy system. Non-Stratagy voice boards will cause your entire system to be non-operational.

Stratagy voice boards are manufactured by Rhetorex, Inc. and are configured with a unique Stratagy code allowing them to work with a Stratagy system. You must install and use only Stratagy voice boards supplied by Toshiba. Other Rhetorex voice boards manufactured for other voice processing systems are not configured with the unique Stratagy code. Therefore, a non-Stratagy voice board installed in a Stratagy system will cause the entire system to become non-operational. All non-Stratagy voice boards must be removed to allow the Stratagy system to function. In a Stratagy 24 system, the non-Stratagy voice boards will be identified on the monitor. Non-Stratagy voice boards will also be identified in the Stratagy 4 and 6 systems when these systems are accessed using a laptop PC with Stratagy Remote software via local or remote access.

IMPORTANT NOTE:
Each Stratagy voice processing system has a unique activation key_number entered during manufacturing that matches the Stratagy system software to a Stratagy voice board. The software will not work with any other voice board.

Each Stratagy voice processing system has a unique *activation key_number* that matches the Stratagy system software to a Stratagy voice board. This number is entered into the system during manufacturing.

The *activation key_number* is written on a piece of paper that is shipped with the Stratagy system. Store the number in a safe place.

The activation key_number must be entered to allow the Stratagy system to operate under the following conditions:

- The Stratagy factory-installed voice board is removed.
- The Stratagy hard disk drive is replaced or upgraded.
- The Stratagy system software is re-installed or upgraded.
- Fault isolating or troubleshooting a Stratagy system under direction of Toshiba Technical Support.

In most cases, you must re-enter the original activation key_number shipped with the system. In other cases, you must obtain a new activation key_number by contacting Toshiba.

5.2 PROCEDURES FOR REMOVING AND REPLACING COMPONENTS

The basic procedures for removing and replacing, or installing, Stratagy system hardware are:

1. Use the Stratagy Backup Utility to back up the database, greetings, and messages, as required. For details, see the Installation section, Chapter 5, "Configuring and Backing Up Stratagy."
2. Turn the Stratagy system's power off.
3. Unplug the power cord.
4. Open the Stratagy system.
5. Remove and replace (or install) the components.
6. Close the Stratagy system.
7. Plug in the power cord.
8. Turn the power on.

In addition, note the following special procedures:

Voice board – For information about addressing and installing Stratagy voice boards, see Chapter 2, "Upgrading the System" and the Installation section, Chapter 3, "Installing the Hardware."

Hard disk – When installing a hard disk:

1. Follow the manufacturer's instructions.
2. Install the Stratagy system or Prompt software (when required) from the floppy drive. Refer to Installation section, Chapter 5, "Configuring and Backing Up Stratagy," "Install from A: Drive."
   a. The system prompts for the first disk. Insert the first diskette. Follow the directions.
   b. The system prompts:
      Enter Activation_key number.
      Enter the *Activation_key number* that came with your Stratagy system hardware. If you incorrectly enter the *Activation_key number*, Stratagy will abort and stop. You must now press **Ctrl**, **Alt** and **Del** simultaneously.
   c. Follow the system prompts. When complete, the Main Menu displays.
3. Access the Stratagy Configuration Utility. Select Shutdown (**Alt** + **S**) from the Main Menu.

4. Restore the backup database, greetings and messages. Use the Stratagy Backup Utility (see the Installation section, Chapter 5, "Configuring and Backing Up Stratagy" for details).
5. Return to the Main Menu. Press **Esc** from the Stratagy Configuration Utility Menu. Stratagy is now operational.

Stratagy™ 4 / 6 / 24

MAINTENANCE AND UPGRADES SECTION

CHAPTER 2
UPGRADING THE SYSTEM

TABLE OF CONTENTS

Chapter 2 — Upgrading the System

CHAPTER 2
UPGRADING THE SYSTEM

1 INTRODUCTION

This chapter discusses upgrading an existing Stratagy system. It focuses on:

- Installing screen savers
- Installing voice boards
- Installing fax/modems
- Upgrading the Stratagy 4 to a Stratagy 6

2 INSTALLING SCREEN SAVERS

Stratagy contains a screen saver program that automatically blanks the Main Menu after a specified number of minutes of inactivity (per the Stratagy System Configuration option *tmo_blank).* See the Installation section, Chapter 5, "Configuring and Backup Up Stratagy."

Installing a different screen saver program is **not** recommended; Stratagy may not work.

3 INSTALLING STRATAGY VOICE BOARDS

Installing a voice board into a Stratagy system PC involves addressing the board before installing it.

Before starting the installation process, shut down Stratagy. From the Main Menu, enter:

```
Alt + S
```

Enter the password (the default is Stratagy, with the first letter uppercase). The Stratagy Configuration Utility displays.

For details about Stratagy voice boards, including addressing and installation, see the Installation section, Chapter 3, "Installing the Hardware."

4 INSTALLING FAX/MODEMS

Installing a fax/modem in the Stratagy 24 involves selecting one that meets specific requirements, installing the hardware, and configuring Stratagy using the Stratagy Configuration Utility. In addition, you (or the System Administrator) will need to customize Stratagy to send and receive faxes.

4.1 FAX/MODEM REQUIREMENTS

The fax/modem used in Stratagy 24 must be external and meet the following requirements:

- Class 2 compliant (class 2 is *different* from class 2.0)
- UART 16550
  - Internal fax/modems must have a UART 16550 serial interface.
  - External fax/modems must be connected to UART 16550 serial ports.

4.2 INSTALLING FAX/MODEM HARDWARE

Installing the fax/modem. To install the hardware, follow the manufacturer's instructions.

Configuring the fax/modem. Configure the fax/modem as one of the following:

COM1 with IRQ4 and no other devices on COM1 or using IRQ4.

COM2 with IRQ3 and no other devices on COM2 or using IRQ3.

4.3 CONFIGURING STRATAGY FOR FAX/MODEMS

Set the following configuration parameters. See the Stratagy System Configuration options in the Installation section, Chapter 5, "Configuring and Backing Up Stratagy" for details.

ext#: extension number where the fax/modem is connected on the telephone system

fax#: fax/modem's fax number

x: access to outside line (usually '9')

COM1 Settings:	COM2 Settings:
baud1 19200	baud2 19200
databits1 8	databits2 8
parity1 none	parity2 none
serial_port1 1	serial_port2 2
fax1 *'ext#'*	fax2 *'ext#'*
fax_dl_init '*x*,	fax_dl_init '*x*,
fax_id '*fax#*	fax_id '*fax#*

Additionally, set the following options for the fax modem:

fax_flow_control

fdax_start_character.

4.4 CUSTOMIZING STRATAGY TO SEND AND RECEIVE FAXES

For information on using the Token Programming Language to customize Stratagy to send and receive faxes, refer to the Programming section.

5 UPGRADING THE STRATAGY 4 TO THE STRATAGY 6

To upgrade from the Stratagy 4 to the Stratagy 6 requires installing Stratagy 6 software. Do the following:

1. Use the Stratagy Backup Utility to back up the database, greetings, and messages, as required. Everything not backed up will be lost. For details, see the Programming section, Chapter 5, "Configuring and Backing Up Stratagy."
2. Install the Stratagy System or Prompt software from the floppy drive. Refer to the Installation section, Chapter 5, "Configuring and Backing Up Stratagy," "Install from A: Drive."
   a. The system prompts for the first disk. Insert the first diskette. Follow the directions.
   b. The system then prompts:
      Enter New Activation_key number.
      Enter the *New Activation_key number* provided by Toshiba when you upgraded from the Stratagy 4 to the Stratagy 6 system.
      If you incorrectly enter the *New Activation_key number*, Stratagy will abort and stop. You must now press **Ctrl**, **Alt** and **Del** simultaneously.
   c. Follow the system prompts. When complete, the Main Menu displays.
3. Access the Stratagy Configuration Utility. Select Shutdown (**Alt** + **S**) from the Main Menu.
4. Restore the backup database, greetings and messages. Use the Stratagy Backup Utility (see the Installation section, Chapter 5, "Configuring and Backing Up Stratagy" for details).
5. Return to the Main Menu. Press **Esc** from the Stratagy Configuration Utility and press any key when prompted. Stratagy is now operational.

Stratagy™ 4 / 6 / 24

OPERATING PROCEDURES SECTION

TOSHIBA Stratagy

Voice Processing System Quick Reference Guide

 - SIDE ONE -

ACCESSING STRATAGY

Call Stratagy at _____

From your own phone press ✱, then enter your Stratagy ID Number, press #.

Enter your security code, press #.

Note: It is not always necessary to press the # key. Stratagy will automatically go to the next step in a few seconds.

The first series of selections you hear will be the **MAIN MENU**.

MAIN MENU

- 1 **PLAY** your **MESSAGES**
- 2 **CHANGE** your greeting
- 3 **CHANGE** your options
- 4 **SEND** a new **MESSAGE**
- 5 **MANAGE** your lists
- 6 **MANAGE** your guest User IDs
- 0 **EXIT** user mode
- # **HANG UP**

The **MAIN MENU** items in red are described on this side of the Quick Reference Guide.

LISTEN TO MESSAGES

From the **MAIN MENU**:

1 PLAY MESSAGES

- 1 **PLAY** the (next) message now
- 2 **REPLAY** the current message
- 3 **DELETE** the current message
- 4 **PLAY** the **previous** message
- 5 **FORWARD** the current message
- 6 **REPLY** to the current message
- 7 **SPECIAL FUNCTIONS / PAUSE**
  Pause 30 secs. (ON/OFF). or select:
  - 1 Immediate **FAX** retrieve from fax machine
  - 2 Send **FAX** for retrieval to fax machine
  - 3 **UNDELETE** message
  - 4 Message **DATE** and **TIME**
  - 5 **SKIP** to next new message
  - 6 **CONTINUOUS DELETE**
  - 8 **CONTINUOUS PLAY**
  - 9 **RETURN** to previous menu
- 9 **RETURN** to **MAIN MENU**

PLAYING OPTIONS

While Playing messages, you can select:

- 8 **TURN UP** volume
- 0 **TURN DOWN** volume
- ✱ **BACKUP** (5 secs.)
- # **GO FORWARD** (5 secs.)

SENDING MESSAGES

From the **MAIN MENU**:

4 SEND MESSAGES

SELECT DESTINATION

- 1 for **USER ID**
- 4 for **LIST**

RECORD NEW MESSAGE / PREFIX / REPLY

- 2 **RECORD** your message, prefix or reply
  - # when **FINISHED**
  - 1 **REVIEW**
  - 2 **RE-RECORD**
  - 3 **APPEND** recording
  - 4 **CANCEL** recording
  - 5 set **URGENT** status (ON/OFF)
  - 6 set **PRIVATE** status (ON/OFF)
  - 7 set message **DELIVERY TIME**
  - 9 **SAVE** recording
- 9 **RETURN** to previous menu

SEND / FORWARD / REPLY MESSAGE

- 3 **SEND** the message or reply
- 5 **SEND** the message or reply with verification
  To send another message, start over with SELECT DESTINATION
- 9 **RETURN** to previous menu

MESSAGE DELIVERY TIME

- 1 Set the **HOUR**
  - 1 **A.M.**
  - 2 **P.M.**
- 2 Set the **MINUTES**
- 3 Set the **DAY**
- 4 Set the **MONTH**
- 5 Set the **YEAR** (2-digits)
- 9 **RETURN** to previous menu
  (Message delivery time plays)

HINTS and TIPS

Messaging

While listening to a message, you have these options:
Pause/Special Functions: Press 7 while playing your messages to pause for 30 seconds. Each time you press 7, the message will start or stop.
You can also access a Special Function by pressing its number immediately after pressing 7. Special Functions are silent (you will not hear prompts).
ON/OFF options: Each time that you press a key with an ON/OFF option, the feature turns ON or OFF.
Message Prefix is played first, followed by the original message.
Urgent messages are played first.
Private messages cannot be forwarded.
Delete Messages: Messages are saved unless you delete them. (Use Special Function 3 to undelete.)
Continuous Delete: This will play/delete many messages at a time (configurable). (Special Function 8)

OPERATING PROCEDURES

STRATAGY 4/6/24 INSTALLATION AND MAINTENANCE MANUAL

QUICK REFERENCE GUIDE

SEPTEMBER 1994

TOSHIBA Stratagy

Voice Processing System Quick Reference Guide

 - SIDE TWO -

ACCESSING STRATAGY

Call Stratagy at _____

From your own phone press ✱, then enter your Stratagy ID Number, press #.

Enter your security code, press #.

Note: It is not always necessary to press the # key. Stratagy will automatically go to the next step in a few seconds.

The first series of selections you hear will be the **MAIN MENU**.

MAIN MENU

- 1 **PLAY** your messages
- 2 **CHANGE** your **GREETING**
- 3 **CHANGE** your **OPTIONS**
- 4 **SEND** a new message
- 5 **MANAGE** your **LISTS**
- 6 **MANAGE** your **GUEST USER** IDs
- 0 **EXIT** user mode
- # **HANG UP**

The **MAIN MENU** items in red are described on this side of the Quick Reference Guide.

GREETINGS

From the **MAIN MENU**:

2 CHANGE YOUR GREETING

SELECT WHICH GREETING TO CREATE / CHANGE

- 1 2 3 4 5 6 or 7 for a Personal Greeting, or
- # to select the System Greeting
  - 1 **REVIEW** selected greeting
  - 2 **RECORD** (new) greeting (press # when finished)
    - 1 **REVIEW** recording
    - 2 **RE-RECORD**
    - 3 **APPEND** to recording
    - 4 **CANCEL** recording
    - 9 **SAVE** recording
  - 9 **RETURN** to previous menu
- ✱ **REVIEW** current greeting
- 9 **RETURN** to **MAIN MENU**

OPTIONS, LISTS & GUEST IDs

From the **MAIN MENU**:

3 CHANGE YOUR OPTIONS

- 1 Change your **DO-NOT-DISTURB** (ON/OFF)
- 2 Change your **CALL SCREENING** (ON/OFF)
- 3 Change your **SECURITY CODE**
- 4 **SELECT** your **BUSY GREETING**
- 5 **RECORD** your **BUSY GREETING**
- 6 Record your **NAME/EXTENSION**
- ✱ Review your **OPTION SETTINGS**
- 9 Return to the **MAIN MENU**

From the **MAIN MENU**:

5 MANAGE YOUR LISTS

- 1 2 3 4 5 6 or 7 to select a list
  - 1 **REVIEW** your current list
  - 2 **ADD** a User ID to the list
  - 3 **DELETE** a User ID from the list
  - 4 **RECORD** a list comment
  - 9 **RETURN** to the previous menu
- 9 **RETURN** to the **MAIN MENU**

From the **MAIN MENU**:

6 MANAGE GUEST USER IDs

- 1 **CREATE** a Guest User ID
- 2 **DELETE** a Guest User ID
- 3 **REVIEW** your Guest User IDs
- 9 **RETURN** to the **MAIN MENU**

HINTS and TIPS

Greetings

Select a greeting for your mailbox: You may record 7 different greetings that may be selected at any time, or choose to use the pre-recorded system greeting.
Name/Extension recording is used for directory information, system greeting, and user identification.

Options

Change your security code on a regular basis.

Manage Your Lists

Record a List Comment to identify/name the list.

Other Tips

From any menu, 9 9 9 will always return you to the Main Menu.
Stratagy may be configured so that from the Main Menu you can press 0 and enter another User ID without having to hang up (Exit User Mode).
Dialing 9 9 9 # will always hang up.

DIRECTORY

Item Number: 4010342 Part Number: STG-QR-4/6/24R1

CHAPTER 5

CHAPTER 6

FIGURE LIST

TABLE LIST

GENERAL DESCRIPTION

Stratagy transparently manages multiple voice processing functions simultaneously 24 hours a day, seven days a week. Your mailbox is always available for callers to leave private voice or fax (optional feature) messages. In addition, you may update your greeting at your convenience or send and receive messages from any tone dialing telephone.

Callers control their own progress through the system. They no longer have to wait for a person to answer the telephone. If your extension is busy or you do not answer, callers may transfer to an operator, call another extension, or record a private, detailed message.

PURPOSE

This Users Guide, designed for users of the Stratagy Voice Processing System, describes the basic voice messaging capabilities and operations.

Other related documents include:
- Stratagy Voice Processing Quick Reference Guide
- Stratagy Voice Processing Features Description
- Stratagy Installation and Maintenance Manual

HOW TO USE THIS GUIDE

This guide provides the features and operation steps for making the Stratagy system work for you. The right column describes the features first, then how the system reacts during the activating of a feature. The left column details your steps to activating a feature.

For ease of use, this guide has been organized into six chapters.

Chapter 1, "Getting Started," provides instruction of those features you need when access Stratagy for the first time, including: changing your security code, and record your name and extension.

Chapters 2 through 6 provide step by step instructions on: playing and sending message, recording messages and greetings, using destination (distribution) lists, and activating options such as do not disturb and call screening.

Chapter 6, "Integrating Telephone Options," explains how to use your integrate Stratagy into your existing Toshiba telephones.

Some of the features may not accessed unless they are turned on by your System Administrator. The configuration of your system will also affect how and which features you may access. This user guide provides hints and notes about certain feature exceptions and which features may be configured to work differently.

CONVENTIONS

In this book, top level menus are shown with a square button icon in the feature instructions, such as:

1 **PLAY** your **MESSAGES.**

Lower level menu selections are represented with bold type, such as:

1 REVIEW.

QUICK REFERENCE GUIDE

Enclosed in the front of this book is a wallet-size Quick Reference Guide. Side 1 contains instructions for messaging features — Playing and Sending messages. Side 2 shows the menus for Changing Your Greeting, Changing Your Options, Managing Your Lists, and Managing Guest User IDs. We suggest that you read this user guide first to become familiar with how the features work, then refer to the Quick Reference guide.

ACTION TEXT
SPECIFIC INSTRUCTIONS ON HOW TO PERFORM A PROCEDURE ARE NUMBERED AND ENTERED IN THE LEFT-HAND COLUMN.

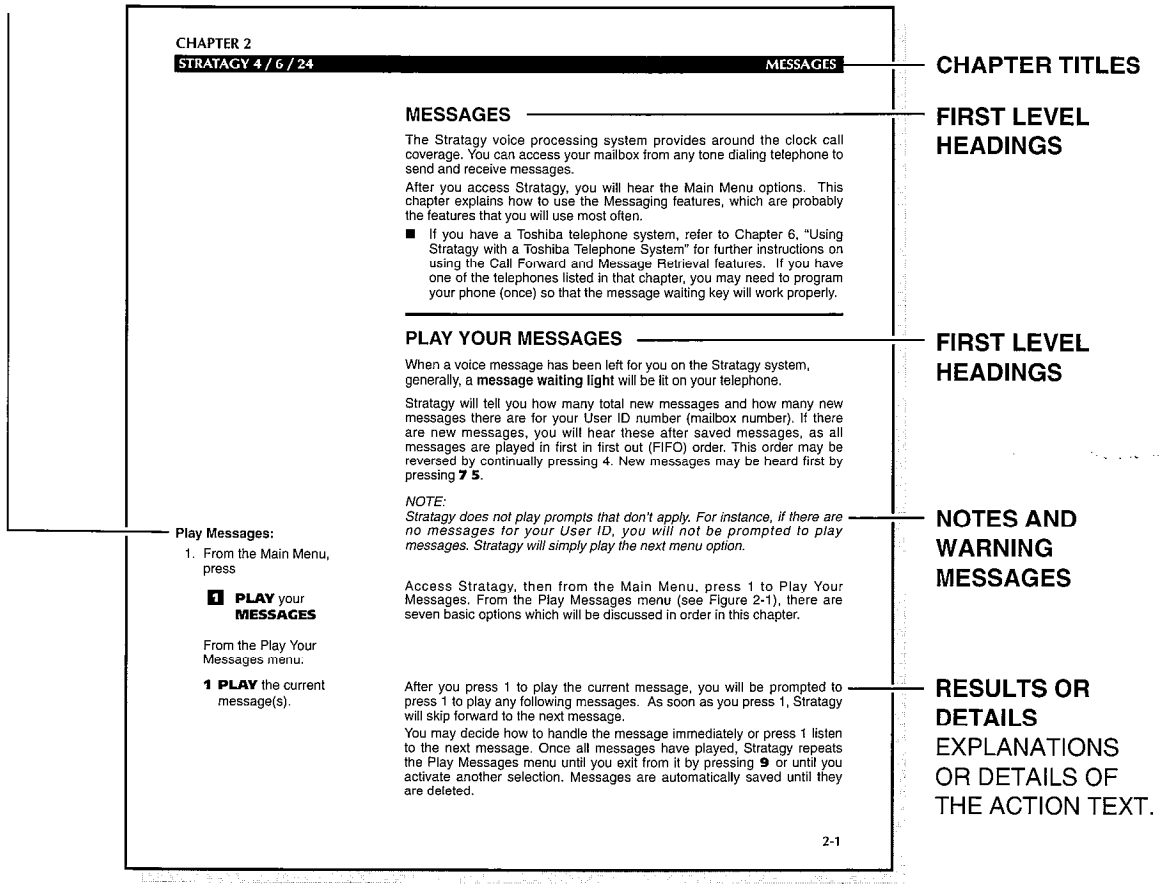

Figure I-1
Sample Page

GETTING STARTED

ACCESS YOUR MAILBOX

When you access your User ID (mailbox), Stratagy will play the Main Menu options. The Main Menu will be your starting point for all of Stratagy's messaging features. Pressing 999 at any time will always return to you the Main Menu.

Before you begin using the messaging features, you should read through this chapter and perform a few basic steps.

- We suggest that you begin with changing your security code to ensure privacy and that you change it on a regular basis.
- In addition, you may want to record your name and extension for the Information Directory. Your name and extension are automatically selected as the greeting to play whenever your mailbox is accessed.

Begin with entering your mailbox.

To Enter Your Mailbox:

1. From an internal telephone, call Stratagy on _____

   . . . or . . .
   from an external telephone, call Stratagy on _____.

   NOTE:
   To enter your mailbox, you will need to know:
   - *The telephone number to access Stratagy*
   - *Your User ID number*
   - *Your security code*

   Please contact your System Administrator if you do not have this information.

   Once you dial into Stratagy, the system answers with your standard company greeting.

2. Press the * key.

3. Enter your User ID, then press the # key.

   Stratagy prompts you to enter your User ID. Entering # tells the system when you're done and allows you to immediately progress to the next step. If you do not enter #, Stratagy will wait for a set amount of time, and then automatically progress to the next step, prompting you to enter your security code.

4. Enter your security code, then press the # key.

   Stratagy prompts you to enter your security code. Entering # tells the system when you're done so you can immediately progress to the next step. If you do not enter #, Stratagy waits, and then progresses to the Main Menu.

   You are now in your mailbox. Stratagy prompts with a list of options from the Main Menu (See Figure 1-1).

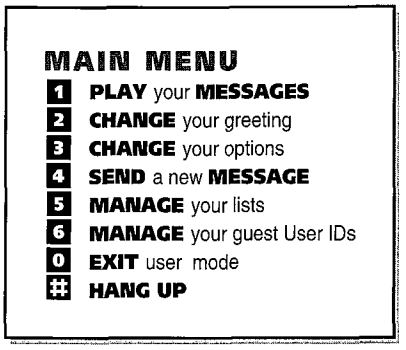

Figure 1-1
Main Menu

NOTE:
The system does not prompt with options that are not applicable. For example, if there are no messages for your User ID (mailbox), then you will not hear "To play your messages, press 1."

CHANGE YOUR SECURITY CODE

You may change your security code as often as you wish to ensure the privacy of your messages and personal greetings. Even if you are not asked to change your security code, you should change it from the pre-assigned security code and as often as requested by your System Administrator.

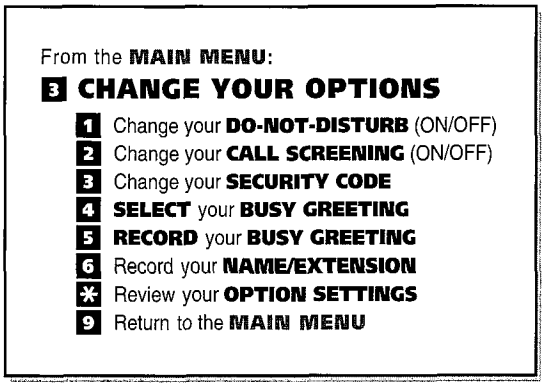

Figure 1-2
Change Your Options Menu

Change Your Security Code:

1. From the Main Menu, press

   3 CHANGE YOUR OPTIONS.

2. Press **3** to change your security code.

3. Enter your new security code.

   Stratagy prompts you to enter your new security code. Finish by pressing the # sign.

   The minimum and maximum and number of digits for the security code is pre-configured by your System Administrator. Please contact your System Administrator for confirmation on the number.

4. Enter your new security code again, then press **#**.

   Stratagy prompts you to re-enter your new security code for verification. Finish by pressing the # sign. Your new security code is confirmed after it is entered a second time.

   After the second entry of your security code, Stratagy will announce that your security code has been changed.

RECORD YOUR NAME AND EXTENSION

Your name and extension are announced whenever the information directory is accessed, the system greeting is selected, and when a message is sent by another Stratagy user. When you first enter your mailbox, you may need to record your name and extension. Stratagy prompts you through the entire recording sequence. You may re-record your name and extension at any time simply by repeating these steps.

To Record Your Name and Extension:

1. From the Main Menu, press

   3 CHANGE YOUR OPTIONS.

   You can record your Name and Extension from the same "Change Your Options" menu used for changing your security code. If you have left that menu, return to the Main Menu and press 3.

2. Press **6** to record your name and extension.

   Stratagy prompts you to record your name and extension. Begin recording at the tone. Finish by pressing the # sign.

3. State your name and extension slowly and clearly. Press **#**.

After recording your name and extension, you can:

1 REVIEW recording	Stratagy will play your newly recorded name and extension.
2 RE-RECORD	You can re-record your name and extension as often as you wish.
3 APPEND to recording	You can add a short comment which will be played to the recording.
4 CANCEL	You can cancel an existing name and extension record.
9 SAVE	Stratagy confirms that your name and extension has been recorded. Stratagy prompts with a list of options. Your name and extension is automatically selected as the greeting to play whenever your mailbox is accessed.

4. Press **9** to return to the previous menu.

You can also select a system greeting or personal greeting to be played whenever your mailbox is accessed. See Chapter 3 of this guide for instructions on selecting/creating greetings.

EXIT YOUR MAILBOX

Always exit your mailbox before you hang up.

To Exit Your Mailbox:

1. Press **9 9 9** to return to the Main Menu.

Pressing 999 will always return you to the Main Menu from anywhere. When you press # to hang up, you will hear "Thank you for calling. Good-bye."

2. Press the **#** to hang up

. . . or . . .

press **0** to exit the user mode.

Stratagy can be configured so that you can exit your mailbox, without leaving the Stratagy system. Please contact your System Administrator to find out if your system is configured for this or some other function when pressing 0

If you have the "0 to EXIT User Mode" capability, you will hear Stratagy's company greeting. You can now access another user or a different mailbox.

MESSAGES

The Stratagy voice processing system provides around the clock call coverage. You can access your mailbox from any tone dialing telephone to send and receive messages.

After you access Stratagy, you will hear the Main Menu options. This chapter explains how to use the Messaging features, which are probably the features that you will use most often.

- If you have a Toshiba telephone system, refer to Chapter 6, "Using Stratagy with a Toshiba Telephone System" for further instructions on using the Call Forward and Message Retrieval features. If you have one of the telephones listed in that chapter, you may need to program your phone (once) so that the message waiting key will work properly.

PLAY YOUR MESSAGES

When a voice message has been left for you on the Stratagy system, generally, a **message waiting light** will be lit on your telephone.

Stratagy will tell you how many total new messages and how many new messages there are for your User ID number (mailbox number). If there are new messages, you will hear these after saved messages, as all messages are played in first in first out (FIFO) order. This order may be reversed by continually pressing 4. New messages may be heard first by pressing **7 5**.

Note:
Stratagy does not play prompts that don't apply. For instance, if there are no messages for your User ID, you will not be prompted to play messages. Stratagy will simply play the next menu option.

Play Messages:

1. From the Main Menu, press

   1 PLAY your **MESSAGES**

   From the Play Your Messages menu:

   1 PLAY the current message(s).

Access Stratagy, then from the Main Menu, press 1 to Play Your Messages. From the Play Messages menu (see Figure 2-1), there are seven basic options which will be discussed in order in this chapter.

After you press 1 to play the current message, you will be prompted to press 1 to play any following messages. As soon as you press 1, Stratagy will skip forward to the next message.

You may decide how to handle the message immediately or press 1 listen to the next message. Once all messages have played, Stratagy repeats the Play Messages menu until you exit from it by pressing **9** or until you activate another selection. Messages are automatically saved until they are deleted.

Figure 2-1
Play Messages menu

Messages are played first in, first out (FIFO) order unless a message is stamped Urgent. The urgent messages are always played first. After the message is played, the urgent stamp is removed.

In addition, messages may be stamped private. The same options, such as saving and deleting, apply to a private message; however, a private message may not be forwarded. The private stamp is never removed.

2 REPLAY the current message

Stratagy repeats the message from the beginning.

3 DELETE the current message

The current message is deleted and the next messages begins to play. A message is saved until you delete it. To undelete a message during the playing message session, press 7 3.

IMPORTANT NOTE:
Once you have exited the Play Messages menu (pressing 9), you may not undelete a message.

NOTE: Stratagy may be programmed to delete a message after a pre-set length of time, with or without user notification. Please consult with your System Administrator for the specific parameters of your system.

4 PLAY the previous message

Stratagy plays the previous message. Initially pressing 4 and continuing to press 4 will play your messages in a last in first out order.

5 FORWARD the current message

Messages may be forwarded to a single user, multiple users, or a destination list. However, private messages may not be forwarded. "Forward the Current Message" leads to several submenus of options, which are detailed later in this Chapter. See **"Forward a Message"**

6 REPLY to the current message

See **"Reply to the Current Message"** later in this chapter for details on this feature.

AVAILABLE CONTROLS WHILE PLAYING MESSAGES

While Playing a Message, you can enter the following:

8 TURN UP volume **0 TURN DOWN volume**	**Volume** — Each time **8** or **0** is pressed, the volume is adjusted one increment until the maximum number of increments is reached. The last volume level will be retained in Stratagy's memory.
*** BACKUP** **# GO FORWARD**	**Backup / Go Forward** — The message will rewind (backup) or go forward (fast forward) 5 seconds and then begins playing at that point. You can backup or go forward repeatedly during a message.
9 9 9	**Returns you to the Main Menu** from any menu level.

Table 2-1
Play Messages Controls

While playing a message, press 7 for either:

7 PAUSE (ON/OFF)

SPECIAL FUNCTIONS / PAUSE

At any time while playing messages, you can press 7 to pause for 30 seconds. The message will resume playing as soon as you press 7 again or at the end of 30 seconds automatically.

. . . or . . .

7 SPECIAL FUNCTIONS, then press an option number:

At any time while playing messages, you can select any of the Special Functions by pressing 7 to access this menu, followed by the number of the Special Function that you want to select. You will not hear a prompt for these Special Functions.

1 Retrieve a **FAX**

You retrieve a fax from your mailbox while calling from a fax machine with a handset. Contact your System Administrator to verify that you have this option.

2 Send a **FAX** message

The system sends a fax message to a fax machine for retrieval. Contact your System Administrator to verify that you have this option.

3 UNDELETE a message

Use this to undelete a message. For instance, if you accidently deleted a message by pressing 3 during the current session, just press 73 to undelete and the message will be saved.

IMPORTANT NOTE:
Once you exit from the Play Messages menu (pressing 9), messages may not be undeleted.

4 Message **DATE & TIME**

You will hear the date and time the message was received. If the system administrator programmed a date and time stamp for all messages, the stamp will play automatically at the beginning of the message.

5 SKIP to the next new message

The current message stops. The next new message (one you have not heard) begins playing.

6 CONTINUOUS DELETE

Your messages will be deleted continuously without additional action from you.

NOTE: Your system may be programmed to delete or play all the messages in the queue or until a pre-set number of messages is reached. Please consult with your System Administrator for the specific operation of your system.

8 CONTINUOUS PLAY

Your messages will play continually without additional action from you.

9 RETURN to the previous menu.

You will return to the Play Messages menu.

9 RETURN to Main Menu

You will return to the Main Menu.

SEND A MESSAGE

You may record a message at any time from any tone dialing telephone and send it to an individual user, a personal distribution list, or a system distribution list.

STEPS TO SENDING MESSAGES

From the Main Menu, press 4 to send a message to a User ID (also known as a voice mailbox). There are three basic steps to sending a message:

- Select the Destination
- Record the Message
- Send the Message

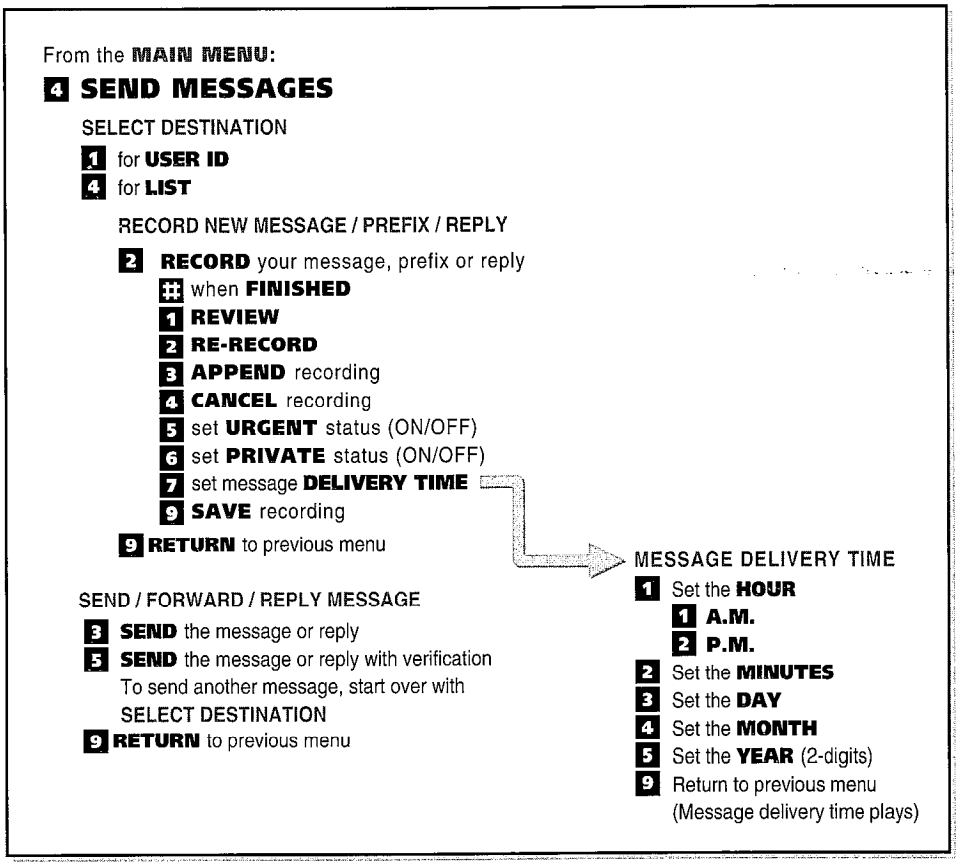

Figure 2-2
Send a Message Menu

Send a message:

1. From the Main Menu, press

   4 SEND MESSAGES

2. Select the Destination:

   Press **1** for a **USER ID** destination

   . . . or . . .

   4 to select a **LIST**

   After selecting a destination, press **#**.

SELECT A DESTINATION

You can send a message to an individual mailbox (User ID number) or a destination list.

User ID Destination: Stratagy prompts for the User ID destination. After you enter the User ID,Stratagy repeats the User ID, then prompts for any additional User IDs. Press the # key when you're finished entering User IDs.

List Destination: When you press 4 to select an existing destination list, Stratagy prompts for the destination list number. Enter the number. Stratagy repeats the number for verification, then prompts for any additional destinations. To finish, press the # key. To create a destination (distribution) list, see Chapter 5, "Manage Your Distribution Lists".

RECORD YOUR MESSAGE

3. Press **2** to **RECORD** a message.

   After recording, press **#** when you're done:

Record your message after the tone. When the message is complete, press the # key to finish. After recording your message, you can send the message with or without verification of receipt.

1 REVIEW recording — When you press 1 to review, the recording plays.

2 RE-RECORD Press **#** when done. — When you re-record, the system prompts you to record at the beep. Press the # key to finish.

3 APPEND to recording — The appended message plays after the already recorded portion of the message The system prompts you to record at the beep. Press the # key to finish.

4 CANCEL recording — The recording is canceled. The system returns you to the Main Menu.

5 Stamp **URGENT** — **Urgen**t messages always play first. To remove the urgent stamp, press **5** again.

6 Stamp **PRIVATE** — **Private** messages may not be forwarded. To remove the private stamp, press **6** again.

7 Set the message **DELIVERY TIME**

Stratagy may be configured so that you can arrange for your message to be delivered at a specific time and date in the future.

IMPORTANT NOTE:
Messages set for Future Delivery cannot be retrieved. Once the message has been sent, you cannot stop the delivery of this message.

1 Set the **HOUR**
1 A.M.
2 P.M.

2 Set the **MINUTES**

3 Set the **DAY**

4 Set the **MONTH**

5 Set the **YEAR** (2 digits)

9 RETURN to previous menu

Stratagy plays the message delivery time and date and returns you to the previous menu.

SEND MESSAGE

4. Send the message—

3 Send your message

. . or . . .

After you send a message, you can forward the message to another user (select another destination) or press 9 to return to the Main Menu. Stratagy tells you that your message has been sent or forwarded.

5 Send your message with verification.

Stratagy tells you that your message has been sent. If you selected "verification," Stratagy will notify you when and by whom the message was received.

FORWARD A MESSAGE

The initial steps for forwarding a message are the same as those for Sending a message. The basic steps to forwarding a message are:

- Select Destination
- Record the Message Prefix (optional)
- Forward the Message

See Figure 2-3, "Forward and Reply to Messages."

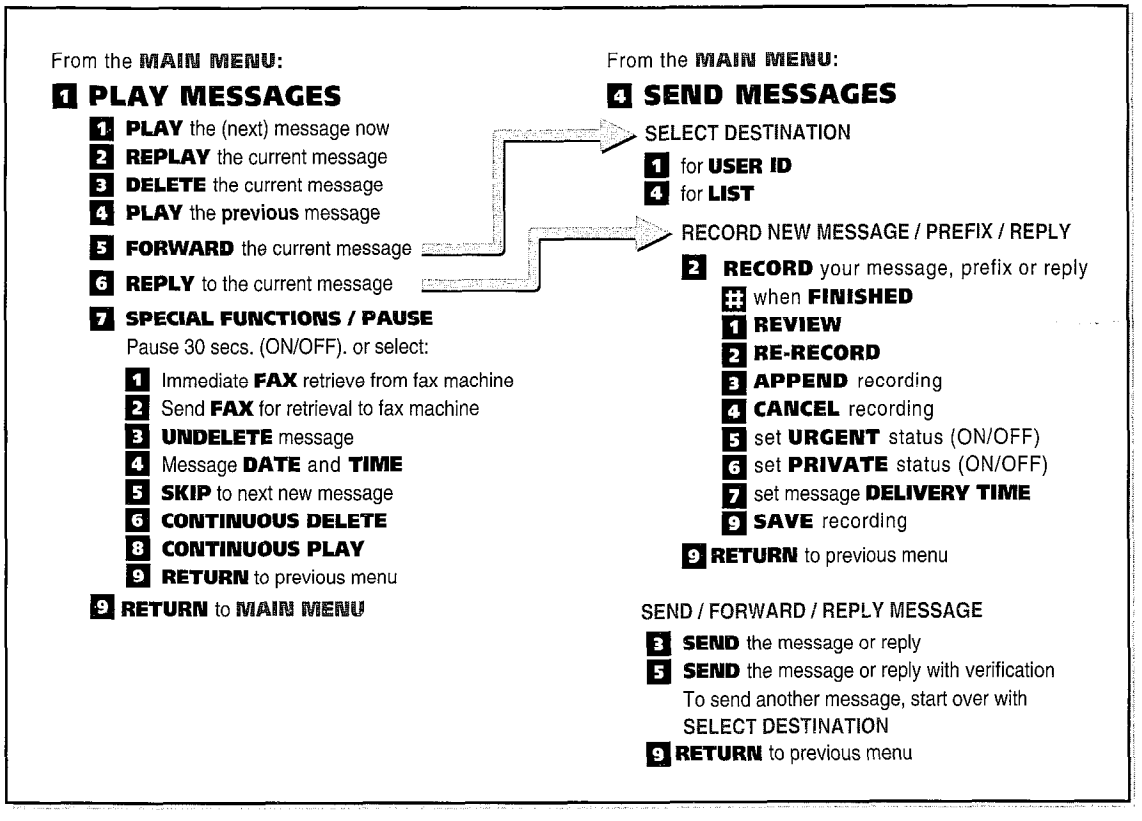

Figure 2-3
Forward and Reply to Messages

Forward a message:

1. From the Play Messages menu, press

   5 FORWARD the current message.

2. Select a destination—press:

   1 USER ID destination
   . . or . . .

   Stratagy prompts for the User ID destination. After you enter the User ID,Stratagy repeats the User ID, then prompts for any additional User IDs. Press the # key when you're finished entering User IDs.

   4 Select a **LIST**

   Press **#** when finished selecting destinations.

   When you press 4 to select an existing destination list, Stratagy prompts for the destination list number. Enter the number. Stratagy repeats the number for verification, then prompts for any additional destinations. To finish, press the # key. To create a destination (distribution) list, see Chapter 5, "Manage Your Distribution Lists".

RECORD YOUR MESSAGE

3. Press **2** to **RECORD** a message prefix.

   (skip this step if you don't want a prefix)

   Record your message after the tone. When the message is complete, press the # key to finish. After recording your message, you can send the message with or without verification of receipt.

   After recording, press **#** when you're done:

   1 REVIEW recording

   When you press 1 to review, the recording plays.

   2 RE-RECORD
   Press **#** when done.

   When you re-record, the system prompts you to record at the beep. Press the # key to finish.

   3 APPEND to recording

   The appended message plays after the already recorded portion of the message The system prompts you to record at the beep. Press the # key to finish.

   4 CANCEL recording

   The recording is canceled. The system returns you to the Main Menu.

   5 Stamp **URGENT**

   Urgent messages always play first. To remove the urgent stamp, press **5** again.

   6 Stamp **PRIVATE**

   Private messages may not be forwarded. To remove the private stamp, press **6** again.

7 Set the message **DELIVERY TIME**

Stratagy may be configured so that you can arrange for your message to be delivered at a specific time and date in the future.

IMPORTANT NOTE:
Messages set for Future Delivery cannot be retrieved. Once the message has been sent, you cannot stop the delivery of this message.

1 Set the **HOUR**
1 A.M.
2 P.M.

2 Set the **MINUTES**

3 Set the **DAY**

4 Set the **MONTH**

5 Set the **YEAR** (2 digits)

9 RETURN to previous menu

Stratagy plays the message delivery time and date and returns you to the previous menu.

4. Forward the message—

3 Forward your message

After you forward a message, you can forward the message to another user (select another destination) or press 9 to return to the Main Menu. Stratagy tells you that your message has been sent or forwarded.

. . or . . .

5 Forward your message with verification.

Stratagy tells you that your message has been sent or forwarded. If you selected "verification," Stratagy will notify you when and by whom the message was received.

REPLY TO THE CURRENT MESSAGE

Stratagy lets you reply to a message that you are currently playing. When you reply to a message, you will not have to select a destination since Stratagy "remembers" the source of that message.

IMPORTANT NOTE:

The Reply feature only works if the original message was sent from a Stratagy User logged on to their mailbox. When an outside caller or a Stratagy User that has not logged on to their mailbox leaves a message for you, you will have to "Send" a message to respond.

Replying to a message is very similar to sending or forwarding a message. See Figure 2-3, "Forward and Reply to Messages"

There are two basic steps to replying to a message:

- Record Your Reply
- Send Your Reply (with or without verification)

To Reply to a Message:

1. From the Play Messages menu, press

   6 **REPLY** to the current message.

   When the message is playing, press 6 to reply to that message.

2. Press **2** to **RECORD** your reply.

   After recording, press **#** when you're done:

RECORD YOUR REPLY

Record your message after the tone. When the message is complete, press the # key to finish. After recording your message, you can send the message with or without verification of receipt.

1 **REVIEW** recording — When you press 1 to review, the recording plays.

2 **RE-RECORD** Press **#** when done. — When you re-record, the system prompts you to record at the beep. Press the # key to finish.

3 **APPEND** to recording — The appended message plays after the already recorded portion of the message The system prompts you to record at the beep. Press the # key to finish.

4 **CANCEL** recording — The recording is canceled. The system returns you to the Main Menu.

5 Stamp **URGENT** — **Urgent** messages always play first. To remove the urgent stamp, press **5** again.

6 Stamp **PRIVATE** — **Private** messages may not be forwarded. To remove the private stamp, press **6** again.

7 Set the message **DELIVERY TIME**

Stratagy may be configured so that you can arrange for your message to be delivered at a specific time and date in the future.

IMPORTANT NOTE:
Messages set for Future Delivery cannot be retrieved. Once the message has been sent, you cannot stop the delivery of this message.

- **1** Set the **HOUR**
  - **1** A.M.
  - **2** P.M.
- **2** Set the **MINUTES**
- **3** Set the **DAY**
- **4** Set the **MONTH**
- **5** Set the **YEAR** (2 digits)

9 RETURN to previous menu

3. Send your reply—

3 Send your reply message

. . or . . .

5 Forward your reply message with verification.

After you reply to a message or press 9 to return, Stratagy tells you that your message has been sent.

Stratagy tells you that your message has been sent. If you selected "verification," Stratagy will notify you when and by whom the message was received.

GREETINGS

You can select one of two types of greetings to play for callers when you do not answer or your phone is busy: Personal Greetings and the System Greeting. Personal Greetings consist of a greeting that you record for callers. A System greeting is pre-recorded and adds your recorded name and extension to the system greeting: "Please leave a message for (name and extension)."

This chapter will discuss the three basic greeting controls shown in Figure 3-1:

- Selecting and Creating Personal Greetings
- Selecting the System Greeting
- Reviewing the Current Greeting

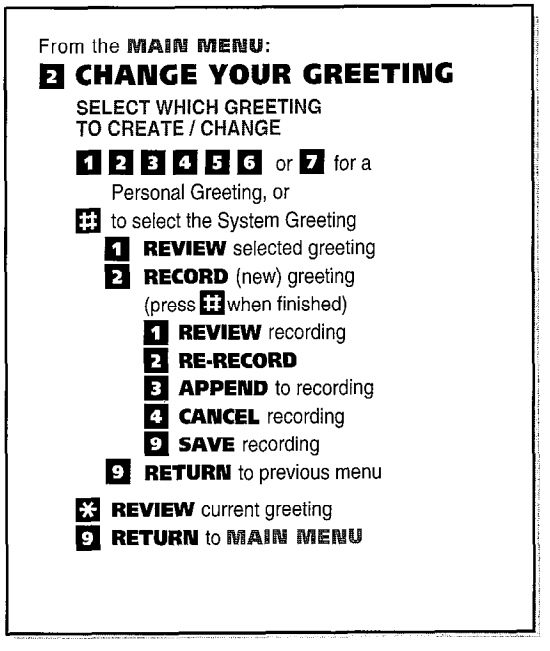

Figure 3-1
Change Your Greeting Menu

Create a Greeting:

1. From the Main Menu press

   2 CHANGE YOUR GREETING.

PERSONAL GREETINGS

Personal greetings should be informative and advise callers when you will be available to return their calls or respond to their messages. You can store up to seven different recorded greetings from which you can choose as your personal greeting. The system administrator can also automatically schedule your greetings to play at different times.

2. Select the personal greeting number to change (or add): **1** through **7**.

CREATE A PERSONAL GREETING

If you are recording a greeting for the first time, select any number from 1 through 7. Your greeting will be asociated with the number chosen. For example, you can record a general greeting as greeting 1, then record a greeting for holidays as greeting 2. Later, you can choose which one will be played. In addition to being able to record up to seven different greetings, you can re-record a greeting at any time.

3. Press **2** to record the greeting (speak slowly and clearly).

The following information should be included in your Personal Greeting:

- Your Name
- Company and/or Department
- Date
- Your Availability
- Instructions to Leave a Detailed Message
- Call Coverage Options

4. After recording, you can press:

Recording Options

- **1 REVIEW** recording — When you press 1 to review, the complete greeting plays.
- **2 RE-RECORD** — When you re-record, the system prompts you to record at the beep. Press the # key to finish.
- **3 APPEND** to recording — The appended greeting plays after the already recorded portion of the greeting. The system prompts you to record at the beep. Press the # key to finish.
- **4 CANCEL** recording — The greeting is canceled. The system re-prompts with their menu.
- **9 SAVE** recording — Stratagy tells you that greeting (number) has been recorded. You may repeat the above steps as many times as you wish.

5. Press **9** to record another greeting (step 2) or press **9** again to return to the Main Menu.

You are given the option to record another greeting. To record another greeting, select another personal greeting number from 1 through 7 and repeat the previous steps, beginning with step 2.

IMPORTANT NOTE:
The last greeting selected or recorded will be the greeting that callers will hear as your User ID greeting.

SELECT (CHANGE) YOUR PERSONAL GREETING

Once greetings have been created, Stratagy stores those greetings until you change or delete them. You can select from your bank of greetings which one will play. The system administrator can also automatically schedule your greetings to play at different times. You may override their function with the following steps until the next greeting is scheduled to play.

Select an Existing Personal Greeting:

1. From the Main Menu press

   2 CHANGE YOUR GREETING.

2. Select the number of the personal greeting to be used **1** through **7**.

3. Press **9** to Return to the Main Menu.

The selected greeting will play until you select a different greeting.

Hint:
*If you would like to hear the currently selected greeting, press * to review the current greeting.*

SYSTEM GREETING

The system greeting is pre-recorded and can be used by any User on the Stratagy system. You cannot re-record the system greeting. A system greeting is pre-recorded and adds your recorded name and extension to the system greeting: "Please leave a message for (name and extension)."

Select the System Greeting:

1. From the Main Menu press

   2 CHANGE YOUR GREETING.

2. Press **#** to select the system greeting.

3. Press **9** to return to the Main Menu.

Hint:
*If you would like to hear the currently selected greeting, press * to review the current greeting.*

REVIEW THE CURRENT GREETING

Review Current Greeting

1. From the Main Menu press

   2 CHANGE YOUR GREETING.

2. Press * to review the current greeting.

3. Press **9** to return to the Main Menu.

You can review the current greeting at any time by pressing * from the "Change Your Greetings" menu. Pressing * will not have any affect on the current grreeting.

After reviewing the current greeting, you can select which greeting to create/change, review the current greeting, or press **9** to return to the Main Menu.

CHANGE YOUR OPTIONS

Stratagy provides a number of special options to improve time management and productivity. For example, the Do Not Disturb feature can provide blocks of time for meetings or projects uninterrupted by the ringing of a telephone.

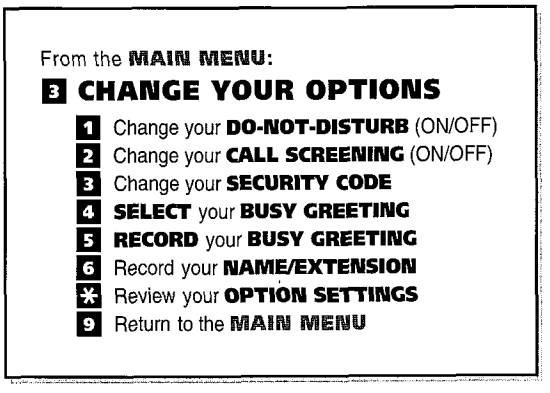

Figure 4-1
Change Your Options Menu

Change Your Options:

1. From the Main Menu press

   3 CHANGE YOUR OPTIONS.

   Select any of the following:

If you do not hear all options for this menu, they may not be configured for your telephone or system. Please contact your System Administrator to verify which Change Options are available to you.

DO NOT DISTURB

When the Do Not Disturb feature is on, Stratagy automatically sends all of your callers to your User ID (mailbox) without ringing your telephone first. Outgoing calls and calls not placed through the Stratagy system automated attendant are unaffected. This feature must be activated by the System Administrator in order for you to use it.

1 DO-NOT-DISTURB (ON/OFF).

This feature operates in an ON/OFF mode. Selecting Do Not Disturb once turns the feature ON; pressing 1 again turns the feature OFF.

IMPORTANT NOTE:

Do Not Disturb on the Stratagy voice processing system is different from the Do Not Disturb features for your telephone system. If your telephone comes with a Do Not Disturb button or feature, it will work independently from this feature on Stratagy.

CALL SCREENING

When Call Screening is on, Stratagy asks callers for their name and company name. Without the caller's knowledge, the system relays that information to you. You may decide to receive the call or let the call forward to your mailbox.

2 CALL SCREENING (ON/OFF).

Once this feature is activated by the System Administrator, you may select it at any time. The feature operates in an ON/OFF mode. Selecting Call Screening once turns the feature ON. Selecting it again turns the feature OFF. The system administrator may also automatically schedule call screening to turn ON/OFF at different times.

SECURITY CODE

3 Change your **SECURITY CODE**.

Enter your security code, then press #. You will be prompted to enter your security code again, then press #. For more detailed information on setting or changing your security code, refer to the instructions in Chapter 1, "Getting Started."

IMPORTANT NOTE:

We recommend that you change your security code often to prevent unauthorized access to your personal Stratagy User ID (and messages), and possibly your telephone system and network.

SELECT YOUR BUSY GREETING

4 Select your **BUSY GREETING**.

You must first record a busy greeting before you can select it.

While your callers hear your busy greeting, they can enter a different User ID, or press the * key to hold, or remain on the line to leave a message.

The feature operates in an ON/OFF mode. Selecting your busy message once turns the feature ON. Selecting it again turns it OFF.

Record Your Busy Greeting

5 Record your **BUSY GREETING**, followed by **#**.

Stratagy prompts you to record your custom busy greeting. Begin recording at the tone. Finish by pressing the # sign.

After recording, you can press:

1 REVIEW recording — When you press 1 to review, the complete greeting plays.

2 RE-RECORD — When you re-record, the system prompts you to record at the beep. Press the # key to finish.

3 APPEND to recording — The appended message plays after the recorded greeting. The system prompts you to record at the beep. Press the # key to finish.

4 CANCEL recording — The greeting is canceled. The system prompts with a list of options.

9 SAVE recording — Stratagy tells you that the custom busy greeting has been recorded. You may repeat the above steps as many times as you wish.

RECORD YOUR NAME / EXTENSION

6 Record your **NAME/ EXTENSION**.

This information is used for Directory Information, prefix to the system greeting, and User Identification name announcement. Please refer to the instructions in Chapter 1, "Getting Started."

REVIEW YOUR OPTION SETTINGS

***** Review your **OPTION SETTINGS**.

Stratagy prompts with the status of your options without changing them, such as Do Not Disturb is on, Call Screening is off, your busy message is (recorded message plays), and so on.

9 RETURN to the Main Menu.

You will return to the Main Menu.

MANAGE YOUR DISTRIBUTION LISTS

Stratagy provides the ability to create and manage lists, such as Destination and Guest User IDs. You may create up to seven personal destination lists that consist of your most frequently accessed User IDs. These lists may be created by an individual User ID or groups of User IDs.

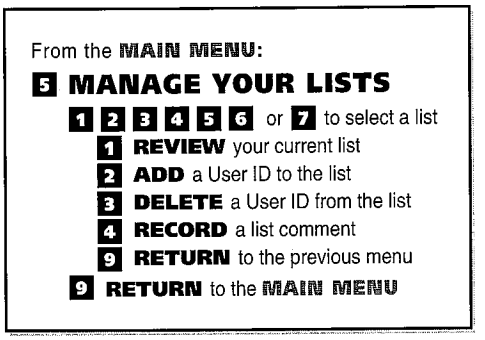

Figure 5-1
Manage Your Lists Menu

SELECT A LIST TO REVIEW OR CHANGE

From the Manage Your Lists menu, you can review the list contents, add and delete User IDs to the list, and record a list comment to help you identify the list.

Manage Your Lists:

1. From the Main Menu press

   5 MANAGE YOUR LISTS.

2. Select the desired list number, **1** through **7**.

3. After selecting a list, you can press:

1 REVIEW your current list.	The system prompts with the name and extension of each User ID on the list.
2 ADD a User ID to the list.	Stratagy prompts you to enter the User ID. Once you enter the User ID, that name and extension plays. You may add additional User IDs as needed. When finished, press the # key.
3 DELETE a User ID from the list.	Stratagy prompts "Enter the User ID. Finish by pressing the # sign." Once the User ID is entered, that name and extension plays. The system prompts "Deleted."
4 RECORD a list comment.	You may identify or name the list for ease of use. Stratagy prompts "Enter the comment. Finish by pressing the # sign." This comment will play each time the list destination is selected when sending a message.
9 RETURN to the previous menu.	Stratagy prompts you from step 2.

9 RETURN to the Main Menu.

MANAGING AND USING GUEST USER IDs

Guest User IDs provide limited access to the Stratagy system for temporary and project-oriented employees, such as consultants and contractors. Guest users may only send messages to their Host User ID and other guests of their Host User ID.

MANAGING GUEST USER IDS

The Guest User IDs are selected from a system-generated list and assigned on a per-use basis. See your System Administrator for details if you have this feature.

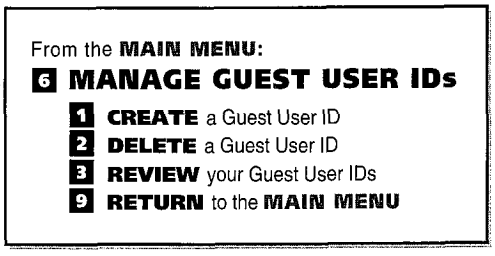

Figure 5-2
Manage Guest User IDs menu

Managing Guest User IDs:

1. From the Main Menu press
   6 MANAGE GUEST USER IDs.
2. Select one of the following:
   - **1 CREATE** a Guest User ID — The system prompts with a guest user ID number. Be sure to make a note of the number and the person you assign to that guest user ID.
   - **2 DELETE** a Guest User ID — Stratagy prompts you to enter the User ID. Once the guest user ID is entered, the system confirms the guest user ID is deleted.
   - **3 REVIEW** your Guest User ID — The system lists your guest user ID numbers.
   - **9 RETURN** to the Main Menu.

Using Guest User IDs:

USING GUEST USER IDs

Instruct your guest users to call the Stratagy system and identify themselves as guest users for your mailbox. Then, they may use Stratagy to send, receive, and reply to the messages with your mailbox (Host ID) only as a typical Stratagy user.

1. Call the Stratagy system.

   Follow the same procedures as in Chapter 1, "Getting Started."

2. Dial 998 and press **#**.

   This identifies the caller as a guest user.

3. Dial the Host User ID and press **#**.

   This identifies the caller as your guest for sending messages to your mailbox (Host ID).

4. Press *****, then enter the Guest User ID and press **#**.

   Follow the same procedures as in Chapter 1, "Getting Started."

5. Dial their security code and press **#**.

   Follow the same procedures as in Chapter 1, "Getting Started." The Guest User is now at the Main Menu.

USING STRATAGY WITH A TOSHIBA TELEPHONE SYSTEM

This chapter explains the procedures for programming the Toshiba proprietary telephones for Call Forward and Message Retrieval when using a Stratagy voice processing system with one of the following Toshiba telephone systems:

- PERCEPTION 4000
- PERCEPTION$_{e\&ex}$/I/II
- STRATA series

NOTE: Stratagy 4 systems may only be used with Strata DK8 or DK16.

Once programmed, your Stratagy voice processing system can answer calls when you are busy or not available and can give callers choices when you don't answer, such as: recording a message, dialing another extension, or dialing 0 for assistance.

NOTE: This chapter does not include the procedures for Call Forward and Message Retrieval with a standard telephone. Consult the appropriate Toshiba Standard Telephone User Guide for these instructions.

CALL FORWARD

If you have a PERCEPTION I/II/$_{e/ex}$ or Strata telephone system, you will need to program your telephone once for Call Forward and Message Retrieval functions. You will only have to program your telephone once, then you can follow the appropriate steps for using Call Forward and Message Retrieval.

Please note that if you have a PERCEPTION 4000 telephone system , you do not have to preprogram any of the keys to forward calls or retrieve messages. Your Call Forward and Message Retrieval keys have already been programmed, so all you have to do is follow the appropriate steps to perform these functions.

NOTES:

1. *If you do not have Call Forward keys, then you can use access codes instead. Refer to the appropriate User Guide for the Call Forward access/cancellation codes or check with your System Administrator.*
2. *With most Toshiba proprietary telephones, you can store the sequence of steps on a Speed Dial button for quick access. Refer to the appropriate Quick Reference or User Guide for your telephone for information and instructions on using Speed Dial buttons.*

PERCEPTION 4000 SYSTEMS

■ Call Forward with PERCEPTION 4000 Telephones

PERCEPTION 4000

To forward calls to your mailbox, enter the Stratagy system number for the type of Call Forwarding desired on your telephone.

To Forward Calls to Stratagy:

1. Press a **Call Forward** key or enter a Call Forward access code.

The Call Forward LED will flash, or you will hear recall dial tone.

2. Dial the Stratagy system number _____.

When the Call Forward LED lights steady, calls will be forwarded to your mailbox. Display telephones will show that forwarding has been set. If using a feature access code, listen for success tone and then hang up.

To Cancel Call Forward to Stratagy:

1. Press the **Call Forward** key, or enter the Call Forward Cancellation access code.

The Call Forward LED will go off, or you will hear success tone, indicating that Call Forward registration has been canceled.

■ Message Retrieval with PERCEPTION 4000 Telephones

PERCEPTION 4000 digital telephones (HDT2010S and HDT2020SD) provide message notification via the fixed MESSAGE key. The HDT2020SD provides an additional form of message notification via the Liquid Crystal Display (LCD) soft keys.

The Stratagy system number has been preprogrammed onto the MESSAGE key on your telephone. When messages are waiting and the MESSAGE key is pressed, you will be automatically connected to the Stratagy system, allowing you direct access into your mailbox.

To Retrieve Stratagy voice mail messages:

1. Press the **MESSAGE** key.

If the message is a voice mail message, the system will automatically call the Stratagy system. Follow the prompts to retrieve your messages.

... or ...

A1 Press the **MSG** soft key.

If there is a message in your mailbox, your telephone displays "VMS CTR," and soft key labels will appear.

A2. Press the **CALL** soft key.

The system will automatically call Stratagy.

PERCEPTION I/II or PERCEPTION$_{e\&ex}$ SYSTEMS

(Ver. A.06 or Later)

PERCEPTION I/II or PERCEPTIONe&ex Telephones—

NOTE: Refer to the appropriate PERCEPTION Telephone User Guide for access codes or check with your System Administrator.

■ Call Forward with PERCEPTION I/II/$_{e/ex}$ Telephones

To Forward Calls to Stratagy:

1. Press the Call Forward key or enter the appropriate Call Forward access code.

   The LED will flash, or you will hear recall dial tone.

2. Dial the Stratagy system number _____.

   If an access code was dialed, listen for recall dial tone. See your System Administrator for the correct internal access number. (This is usually a hunt group pilot number.)

3. Press **9 1**.

4. Enter your mailbox number.

5. Press the Call Forward key (or press **#** if an access code is used).

   The Call Forward LED will light steady, and calls will be forwarded to your mailbox. Display telephones show that Call Forward has been registered.

To Cancel Call Forward to Stratagy:

1. Press the **Call Forward** key, or enter the Call Forward Cancellation access code.

   The Call Forward LED will go off, or you will hear recall dial tone. Call Forward registration is canceled.

■ Message Retrieval with PERCEPTION I/II/$_{e/ex}$ Telephones

You can set the message (MSG) key to automatically retrieve your messages. Internal access digits will automatically be sent to the Stratagy system, allowing you direct access into your mailbox with the push of one button.

To program the MSG key to retrieve messages automatically:

1. Press the **MSG** key.

   The MSG LED will flash.

2. Dial the Stratagy system number _____.

   See your System Administrator for the correct internal access number. (This is usually a hunt group pilot number.)

PERCEPTION I/II, e&ex
(continued)

3. Press **9 2**.
4. Enter your mailbox number, followed by **# #**.
5. Enter your security code.

IMPORTANT NOTE:
Storing your security code here will allow you to bypass the process of entering your security code every time you access your mailbox; however, this will also allow anyone to retrieve your messages. If you do not want to store your security code here, skip this step.

6. Press the **MSG** key.

The MSG LED will light steady if it was already ON. If it was OFF, the MSG LED will remain OFF. The MSG key is programmed for one touch message retrieval.

To Retrieve voice mail messages from Stratagy:

1. Access an idle line.

NOTE: Pressing the MSG key without first accessing an idle line will "clear" the previous retrieval code.

2. Press the previously-programmed **MSG** key.

The system will automatically call Stratagy.

STRATA DK SYSTEMS

■ Call Forward with Strata DK 24/56/96, 8/16, and 280 Telephones

To direct forwarded calls to your mailbox and to ensure that callers receive your personal greeting, additional internal access digits must be programmed once from your telephone. These digits are called voice mail code. Once programmed, this code will be automatically sent to the Stratagy system whenever calls are forwarded to the Stratagy system from your telephone, allowing callers direct access into your mailbox.

STRATA DK 24/56/96, 8/16 & 280

To program the Stratagy voice mail code from a STRATA DK Telephone:

1. Press the **Intercom** (**INT**) button.

   You will hear intercom dial tone.

2. For Strata DK 24/56/96 and 8/16, press **6 5 6**.

   If you have a Strata DK24/56/96 system, you have completed programming,.you will hear confirmation tone. Display telephones will show "656 I.D. CODE SET."

   For Strata DK 280, press **# 6 5 6**.

   You will hear confirmation tone. Display telephones will show "#656 I.D. CODE SET" or "#656 I.D. CODE SET."

3. Press **9 1.**

4. Enter your Stratagy User ID.

5. Press the **Redial** button. (

   You will hear confirmation tone. Display telephones will show "DATA PROGRAMMED."

6. Press the **Spkr** button.

   Resets your telephone to the idle condition.

NOTES:

1. *To change the voice mail code, repeat steps.*
2. *In order for the # key to function properly while using the Stratagy system with a Toshiba STRATA system, the Speed Dial (REP, SDS) key and the Redial (RDL) key must be provided on your Toshiba proprietary telephone.*

STRATA DK 24/56/96, 8/16 and 280
(continued)

Once you've programmed the Stratagy voice mail code onto your telephone, follow the steps on the left to forward calls to the Stratagy voice processing system.

To Forward Calls to Stratagy:

1. Press a Call Forward key.
   . . or . . .
   Press the **Intercom** (**INT**) key, then enter the appropriate Call Forward access code.

The Call Forward LED will flash, or you will hear confirmation tone.

You will hear confirmation tone if an access code is dialed. Display telephones will show "CALL FORWARD TO."

CALL FORWARD ACCESS CODES

	Strata DK 24/56/96 and 8/16	Strata DK280
Call Forward All Calls	601	#601
Call Forward Busy	602	#602
Call Forward No Answer (Note 1)	603	#603
Call Forward Busy No Answer (Note 2)	604	#604

NOTES:
1. *To complete Call Forwarding, the flexible "NO ANSWER" timer must be set for codes #603 and #604. Press the REP key and enter a value, 08 - 60 seconds then press the RDL key.*
2. *If using a Call Fwd key, press REP key and enter a value 08 - 60 seconds. Press Call Fwd key.*

2. Dial the Stratagy system number _____.

3. Press the **Call Forward** or the **Spkr** (**SPEAKER**) button.

The Call Forward LED will light steady.

STRATA DK 24/56/96, 8/16 and 280
(continued)

To Cancel Call Forward to Stratagy:

1. Press the appropriate **Call Forward** button.
   . . . or . . .
   Press the **Intercom** button, enter **6 0 1** (enter **# 6 0 1** for Strata DK280), then press the **Spkr** (**SPEAKER**) button.

The Call Forward LED will turn off, or you will hear confirmation tone. Call Forward registration will be canceled.

Display telephones will show "CALL FORWARD TO." Dialing 6 0 1 (or # 6 0 1 for Strata DK280) and no station number will cancel any Call Forward type.

To Cancel the Programmed Call Forward Voice Mail Code:

1. Press the **Intercom** (**INT**) button.

   You will hear intercom dial tone.

2. For Strata DK24/56/96 and 8/16, press **6 5 6**.

   For Strata DK280, press **# 6 5 6**.

   You will hear confirmation tone. Display telephones show "656 (or #656 for DK280) ID CODE SET."

3. Press the **Redial** button.

   Display telephones will show "DATA PROGRAMMED." The voice mail code will be canceled.

4. Press the **Spkr** (**SPEAKER**) button.

STRATA DK 24/56/96, 8/16 and 280
(continued)

■ Message Retrieval with STRATA DK 24/56/96, 8/16 and 280 Telephones

You can program your Msg button to automatically retrieve your voice mail messages when you press it.

To Program your Msg Button to Retrieve Messages:

1. Press the **Intercom (INT)** button.

   You will hear dial tone or confirmation tone after you press the button.

2. For Strata DK24/56/96 and 8/16, dial **6 5 7**.

   You will hear confirmation tone. "657" or "#657" is the Stratagy System Identification code for message retrieval from voice mail.

   For Strata DK280, dial **# 6 5 7**.

   Your telephone must have the Speed Dial button for the # button to function properly with the Stratagy system.

3. Dial **9 2**.

4. Enter your mailbox number, then **# #**.

   NOTE: In order for the # key to function properly while using the Stratagy system with a Toshiba STRATA system, the Speed Dial (REP, SDS) key and the Redial (RDL) key must be provided on your Toshiba proprietary telephone.

5. Enter your security code.

   IMPORTANT NOTE:
   Storing your security code allows you to bypass entering your security code every time you access your mailbox; however, this will also allow anyone to retrieve your messages from your phone. Skip this step if you do not want to store your security code.

6. Press the **Redial** button.

   You will hear confirmation tone.

7. Press the **Spkr** button.

To Retrieve Messages with the Msg button:

When the MESSAGE LED flashes...

1. For Strata DK280, press the **Msg** button.

   With the Strata DK280 system, one step is all that is needed to hear your messages.

2. For the Strata DK24/56/96 and 8/16, press **Intercom (INT)**, then the **MSG** button.

   The system will automatically call Stratagy.

   NOTE: Pressing the Msg key first before pressing the INT key will cancel the message waiting notification (i.e., the Msg light will go off even through the registered messages may not have been retrieved yet.

STRATA$_e$ RELEASE 2 SYSTEMS

Remember, you only need to program your Strata telephone once. After it has been programmed, skip to the following steps for Call Forward and Message Retrieval.

■ Call Forward with STRATA$_e$ Telephones

To program the voice mail code from a STRATA$_e$ Telephone:

1. Press the **RDL** key and then the **REP** key.

Display telephones will show the # sign when the RDL key is pressed and the * sign when the REP key is pressed.

NOTE: In order for the # key to function properly while using the Stratagy system with a Toshiba Stratagy voice processing system, the Speed Dial (REP, SDS) key and the Redial (RDL) key must be provided on your Toshiba proprietary telephone.

2. Press **5 6**.

This is the Stratagy system identification code when Call Forward is set. Display telephones will shows "57 ID CODE SET."

3. Press **9 1**.

4. Enter your mailbox number.

5. Press the **RDL** key to store the data.

Display telephones will show the normal date/day/time display.

To Forward Calls to Stratagy from a STRATA$_e$ Telephone:

1. Press the Call Forward key.
   . . . or . . .
   Press **RDL**, then **REP**, then enter Call Forward access code **0 1**.

The Call Forward LED will flash.

Display telephones will show the # sign when the RDL key is pressed and the * sign when the REP key is pressed. When the access code is dialed, displays show "CALL FORWARD TO."

2. Dial the Stratagy system number _____.

3. Press the **Call Forward** key or the **RDL** key.

The Call Forward LED will light steady. Display telephones will show "FORWARD TO STXX."

STRATA$_e$, Release 2
(continued)

NOTES:
1. *STRATAe products support an "ALL CALLS" forward condition only. 0 1 is the "ALL CALLS" Call Forward feature access code. Refer to the STRATA$_e$ Release 2 Telephone User Guide for more information.*
2. *XX = STRATA$_e$ Station Number.*

To Cancel Call Forward to Stratagy:

1. Press the **Call Forward** key.
   . . . or . . .

   Press the **RDL** key and then the **REP** key, and enter Call Forward access code **0 1**.

   The Call Forward LED will flash.

2. Press the **RDL** key to complete the cancellation.

   Call Forward registration is canceled. The "Call Forward" message will be cleared from the display area of display telephones.

   NOTE: STRATA$_e$ products support an "All Calls" cancellation condition only. Refer to the STRATA$_e$ Release 2 User Guide for more detailed information.

To Cancel the programmed Stratagy voice mail code:

1. Press the **RDL** key and then the **REP** key.

   Display telephones will show the # sign when the RDL key is pressed and the * sign when the REP key is pressed.

   NOTE: In order for the # key to function properly while using the Stratagy system with a Toshiba STRATA system, the Speed Dial (REP, SDS) key and the Redial (RDL) key must be provided on your Toshiba proprietary telephone.

2. Press **5 6**.

3. Press the **RDL** key to complete cancellation.

   The voice mail code is now canceled.

STRATA$_e$, Release 2
(continued)

■ Message Retrieval with STRATA$_e$ Telephones

You can set the MW/FL key to automatically retrieve your messages. Whenever the INT key and the MW/FL key are pressed sequentially while the MW/FL light on your telephone flashes, additional internal access digits will be automatically sent to the Stratagy system, allowing you direct access into your mailbox.

To Program the MW/FL key to retrieve messages automatically:

1. Press the **RDL** key and then the **REP** key.

   Display telephones will show the # sign when the RDL key is pressed and the * sign when the REP key is pressed.

2. Press **5 7**.

   The sequence "57" is the Stratagy system identification code when Call Forward is set. This code does not forward calls to the Stratagy system. Display telephones will show "57 I.D. CODE SET."

3. Press **9 2.**

4. Enter your mailbox number, followed by **# #**.

   NOTE: In order for the # key to function properly while using the Stratagy system with a Toshiba STRATA system, the Speed Dial (REP, SDS) key and the Redial (RDL) key must be provided on your Toshiba proprietary telephone.

5. Enter your security code.

   IMPORTANT NOTE:
   Storing your security code here allows you to bypass entering your security code every time you access your mailbox; however, this will also allow anyone to retrieve your messages. If you do not want to store your security, skip this step.

6. Press the **RDL** key to store the data.

   Display telephones will show the normal date/day/time display.

To retrieve messages:

1. When the MW/FL light on your telephone flashes, press the **Intercom** (**INT**) key and then the **MW/FL** key.

   The Stratagy system will be called, and your mailbox number and security code (if programmed) will be automatically dialed with the touch of one button. To listen to messages, follow the instructions on the quick reference map (flow chart) that is on the inside front cover of this user guide.

   NOTE: Pressing the MW/FL key first before pressing the INT key will cancel the message waiting notification (i.e., the MW/FL light will go off) even though the registered messages may not have been retrieved yet.