

Strategy System Software Version 2.09 Upgrade

This bulletin describes the upgrade for all Strategy Voice Processing Systems to software Version 2.09 and is divided into two sections. The first section describes the step-by-step procedures for upgrading the Strategy systems. The second section is a review of the new features and options, which also appears in the "What's New in Strategy Release 2?" Technical Bulletin (TB40-0008).

Please read this document in its entirety before attempting the Upgrade procedure!

Important! *To provide you and your customers with quality support, Toshiba America Information Systems Division (TSD) is requiring all Strategy voice processing systems be upgraded to either Version 1.21 or Version 2.09. Beginning September 1, 1996 TAIS/TSD will no longer support earlier versions. Only Version 1.21 and Version 2.09 or later will be supported beyond September 1, 1996*

Software Compatibility

Release 2.09 uses a different method for memory management in the Strategy 24 and Strategy 16 upgrade kit software than was used in Release 1.

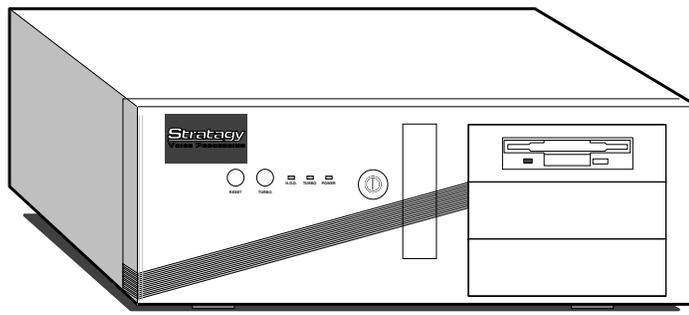
Unfortunately, an incompatibility has been discovered with the earliest hardware configurations that were produced. Only a small quantity of these specific systems were shipped, so it is possible some dealers may not have any installations with this hardware configuration.

Important! *Due to the incompatibility, Strategy may stop during the second boot up sequence of the Release 2.09 upgrade procedure. After upgrading, the problem will not reoccur unless for some reason the upgrade procedure is repeated.*

The incompatibility is corrected with a utility procedure called DualPort that has been included on a separate disk in the package you received from Toshiba. The procedure for performing DualPort can be found at the end of this upgrade procedure section.

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The Stratagy 24 systems that have been identified as having hardware producing the incompatibility have a different face plate on the front of the machine than the system currently being sold. The system in question looks like this:



Important! *If the Stratagy 24 system to be upgraded has this front face plate, make sure that you have the DualPort disk before beginning the upgrade procedure.*

This is the only system, at this time, that Toshiba has identified as having the problem. However, it is possible other configurations could also produce this problem in the future. As a general practice keep the DualPort disk with the package of upgrade disks, so it is always on hand for an upgrade.

CAUTION! *Stratagy Fax Application software Version 1.03, shipped during the release of Stratagy 1.21 System software, cannot be loaded on to a system that has been upgraded to Version 2.09. A new release of Fax Application software for Release 2.09 will be made available on request - Contact Toshiba Product Marketing for details.*

Installation Instructions

1. Verify current system software is at Version 1.21.

Note *You should see 1.21/5.54 in the upper left corner (next to the Stratagy system type) on the Main Menu screen.*

If any other version is displayed, stop this upgrade procedure.

Important! *Stratagy software must be at Version 1.21 before performing the upgrade to Version 2.09.*

2. Shut Stratagy down from the Main Menu by pressing **ALT + S**.
3. Enter the password (the default is **Stratagy**, with the first letter uppercase) and follow the system prompts. The Stratagy Configuration Utility displays.
4. Back up the database, greetings, and/or messages, as required. See Chapter 16 - Backup and Restore in the new Release 2 Installation and Maintenance Manual for details.

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CAUTION! *Stratagy Release 2 database and message structures are entirely different from Stratagy's Release 1 (1.10, 1.11A, 1.18, 1.21) versions of software. During the upgrade procedure the current database will automatically be modified to the new structure. This re-structuring process cannot be reversed; therefore, a complete backup of all information is strongly advised before proceeding with the upgrade.*

5. Insert disk 1 of 2 of the Stratagy System Software Version 2.09 into the floppy drive.
6. From the Stratagy Configuration Utility, enter **Ctrl + C**. "**Terminate batch job**" displays. Type **y** and the **C:\STRATAGY>** prompt displays.
7. Type **A:INSTALL** to begin the installation procedure.
8. You are asked to confirm that software Version 2.09 is to be installed. If another version is displayed, stop the installation by pressing **Esc**. Press any other key to continue.
9. The following choices are displayed on your screen:
 - ✦ Select **Install Complete NEW System**, if you do not wish to retain your current Stratagy database and would like to start with a new database.
 - ✦ Select **Upgrade an Existing System**, if your Stratagy has data that you wish to retain or if you are upgrading a system that is currently installed and operational.

Note *Screen Demonstration Only should not be used at any time.*

Use the up/down arrow keys to make a selection then press **Enter** to start the installation.

10. You are advised concerning the conversion of Release 1 to Release 2 format. If you have not performed a backup, please stop the installation and do so at this time. You may abort the installation by pressing **Esc**. Press any other key to proceed with the upgrade.
11. Stratagy takes an inventory of system components and displays them. Press **Esc** to quit or any other key to continue.
12. The installation begins. During the process you will be prompted to remove disk 1 and insert disk 2. After exchanging the disks, press any key (except **Esc**) to continue.
13. After disk 2 has finished loading, the system performs the conversion of the database and messages to the Release 2 structure and prompts you to remove the disk. Remove disk 2 and press any key (except **Esc**) to continue.
14. The system reboots twice. Once to reconfigure memory, and a second time to restart Stratagy with the new memory configuration.
15. During the second reboot, Stratagy prompts you to insert the first disk of the Stratagy 2.09 English prompts. Insert disk 1 of Stratagy Voice Prompts/ENGLISH Version 2.09 into the floppy drive and press any key (except **Esc**) to continue. The software begins to load. Insert disks 2 and 3 when prompted.

CAUTION! *If Stratagy stops at any point after the second reboot of the upgrade procedure, the DualPort Utility will have to be implemented (see instructions at the end of this section). If Stratagy stops before the second reboot or after the upgrade is completed and Stratagy successfully boots to the Main Menu screen, contact Toshiba Technical Support for assistance*

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16. When disk 3 of the prompts has completed loading, remove the disk and press any key. Stratagy reboots again and displays the Main Menu with **2.09/5.54** displayed as the new system software level.

CAUTION! *Upgrade to Stratagy System Software Version 2.09 is now complete.*

DualPort Utility

To perform the DUALPORT procedure:

1. Power Stratagy down and insert the DualPort Utility diskette into the floppy drive.
2. Power Stratagy up.
3. The system prompts:

Please enter a two character code

The available codes are: **D0, D3, D7, DF**

The preferred code is **D0**.

4. Enter **D0** (zero), press **Enter** and the system prompts:

System is now going to reboot...

Please remove diskette from drive A

Press any key to continue.....

5. Remove the disk and press any key to continue.
6. Stratagy re-boots and continues the upgrade.

If the system stops again during boot up, re-run the DualPort Utility and choose a different code. If problems continue, stop the upgrade and contact Toshiba Technical Support for assistance.

Stratagy Release 2 New Features and Options

Stratagy Release 2.09 adds many new features and options which greatly improve Stratagy's functionality. These include:

Stratagy 16 Upgrade Kit

The Stratagy 6 voice processing system may now be upgraded to a Stratagy 16 by way of the Stratagy 16 Upgrade Kit. The upgrade enables the expansion of voice ports from 6 to 16 and all features of the Stratagy 24, including Fax Back, Fax on Demand and Fax Messaging. For Fax Applications, the optional SG-COM4 serial communications board is required. The Stratagy 16 is only available as a kit. There will be no preloaded version of this model.

User Interface

This refers to the menu trees that a user manipulates after log on. The menus have been greatly streamlined for more efficient functionality. See the new Release 2 *Stratagy User Guide* and Sales Bulletin (SB40-0004) for more details.

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Hot Zero

This feature allows the digit "0" to be dialed at any time during the recording of a message, transferring callers to an operator for assistance.

New and Saved Message Queues

Enables messages to be categorized as new or saved. When a user logs on to a mailbox with this feature enabled, new messages are always played first. The user can toggle between the new and saved message queues by entering the digits **77**.

Future Delivery Review

Users that have recorded future delivery messages may now review or delete the message prior to delivery.

New Directory Operation

In Release 2, the caller will enter a name via the dial pad. Stratagy will search the directory for a match and if it finds one, it will play the name or the mailbox number (if no name has been recorded). The caller can press **#** to select the name, **1** to hear the next name or ***** to re-enter. If the caller presses **#**, they are sent to the selected mailbox and perform what ever function is assigned there.

Message Notification

Users can change a number for notification from their mailbox. This number can be a pager number, a home phone number, or other application specific variables in the Method field of the Notification template/record.

Message Waiting Light

Release 2 software will only turn off the message waiting light if there are no new messages. Messages that have been partially listened to and not either saved or deleted will remain as new messages in the mailbox. The message waiting light stays on as a reminder to the user that new messages are still present in the mailbox.

New Installation and Maintenance Manual

With Release 2 software, comes a new and improved Installation and Maintenance manual. The manual has been completely reworked with new sections covering fax installation and applications, and troubleshooting. The troubleshooting section includes diagnostic procedures and a fault finding chapter that will be routinely supplemented with new troubleshooting hints and solutions from Toshiba Technical Support and dealer technicians. In addition, an Index has been added to give a technician quick access to desired information. This manual will be available when Release 2 software begins shipment.

Important! *To expedite the availability of Release 2 software, AMIS networking is not included in this version. AMIS will be available in a subsequent release due in the fourth quarter of 1996. Please note that though AMIS is not available in Release 2, AMIS parameters will be present in some of the administration screens and documentation.*

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User Screens

Additional features have been added to the user administration screen.

Due to the lack of space on one screen, along with a request from dealers to make the screens less "busy," the user administration information will now be shown on three screens. The three screens are: Options - contains the basic option assignments (e.g., DND, Call Screening, and Greeting assignment), Groups/Chains - contains the single digit menus and Group restriction assignments, and Info/Status - contains information and statistics concerning mailbox activity.

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

0087STG

Options Screen with Sample Data

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S T R A T A G Y						
Save Auto	Delete Notify	Copy Table	Esc/EXIT Options	PgDn/NEXT	PgUp/PREV Info/Status	Groups/ Chains
User ID: 215		Comment:				
Extension: 215		Directory Name 1: Smith				
Security Code:			Directory Name 2: Pat			
Chains:			Groups:			
Chain Done:			Group1: 1			
Chain RNA :			Group2: 0			
Chain Busy:			Group3: 0			
Chain Delay: 0			Group4: 0			
Menus:						
1:		2:		3:		
4:		5:		6:		
7:		8:		9:		
		0:				

0085TG

Group/Chains Screen with Sample Data

S T R A T A G Y						
Save Auto	Delete Notify	Copy Table	Esc/EXIT Group/Chains	PgDn/NEXT	PgUp/PREV Options	Info/ Status
User ID: 215		Comment:				
Extension: 215		Directory Name 1: Smith				
Security Code:			Directory Name 2: Pat			
User's Statistics:						
Box Created: 06/15/95		At: 12:42		Connected Secs: 277		
Box Saved: 07/13/9		At: 15:40		User Secs:Max: 7011		
Messages:						
Current: 3,		0 new (32 sec)		Faxes:		
Maximum: 3		Total 11		Total Faxes: 0		
Statistics:						
Calls: 9		Statistics Started: 06/15/95		At: 12:42		
Transfers: 0		Last Called: 07/06/95		At: 17:01		
Logins: 73		Last Transferred: NEVER		At:		
Notifies: 18		Last Login: 07/06/95		At: 17:01		
		Last Notified: 06/20/95		At: 15:53		

0086TG

Info/Status Screen with Sample Data

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New User Features (features defined as they appear in new User Options screen)

Busy Hold	Allows administrator to enable or disable the ability for a caller to press * to hold.
Slow Menu	Inserts a 500 ms pause between prompts, to slow down the menu prompt playback.
Saved Msg Que	Allows administrator to enable the new and saved message queueing for the mailbox.
Message Order	Allows administrator to enable FIFO (first in first out) or LIFO (last in first out) message playback order for the mailbox.
Caller Menu	Allows administrator to enable or disable the edit menu that plays after a caller is finished recording a message.
Alternate Rate	Allows the administrator to assign a rate of speed (0 ~ 4) for prompts and messages to be played. The user can then toggle between the assigned rate and the default standard rate within the mailbox. The administrator can also assign alternate rate to begin at the time of log on of the mailbox.

New Administrator Functions

Some of the ways that the administrator performs functions in the User screens have changed. To access the three screens, the administrator must press **Alt+I** for the User Info/Status screen, **Alt+G** for the Groups and Menus screen and **Alt+O** for the User Options screen. The system always displays the Options screen first.

New Configuration Parameters

There are new parameters in the Stratagy System Configuration screen for feature and operation enhancements. These include:

set advertising	Programs an advertising message that floats on the screen during screen saver.
set auto report	Assigns a file name that is used as a template for an automatic report to run.
set auto report time	Designates a time that the auto report should run in 24-hour cycles.
set cancel busy hold	Disables the Busy Hold function system wide. Supervised transfers to a busy extension will be handled like ring no answers.
set db locking	Determines whether Stratagy tries to lock a database's records before reading them.
set dir play uid	Controls whether or not the directory feature (411) will play the recorded name and the User ID of the mailboxes that it finds or just play the name that has been recorded.
set login pound	Determines whether or not the prompt "Finish by pressing the pound sign" will be heard, when requesting the User ID or the Security code during log ons. This feature works in conjunction with the fixed digit length feature. (See set fixed len0-9 parameter.)

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set minmsg	Sets the length that a recorded message must be before it is considered valid. Shorter recordings are discarded.
set partial q ok	This option allows the Q() token to save the message even if not all the prompts are completed.
set screen_save	Assigns a file name that will receive trace information whenever the trace is manually enabled from the Main screen.
set tmo dtmf login	Defines the amount of time Strategy waits to determine that the user has finished entering DTMF digits (provided # was not pressed) when entering the User ID and Security code during the log in process. This feature works in conjunction with the fixed digit length feature.
set tmo 2digit menu	Specifies the time to wait after receiving the first digit of a two-digit menu selection within the new user interface.
set tmo resume	Specifies amount of time message playback will pause after pressing 4 . After time elapses, message continues playback from the point of pause.
set use pvc	Controls whether Strategy enables the Rhetorex driver's "Positive Voice Control" feature when dialing and expecting a voice to answer.
set fixed len0-9	This parameter has a listing for 0 through 9. Sets a fixed digit length for the defined leading digit. Removes the user's and caller's requirement of entering # after a User ID to expedite processing.

Fax Configuration

set fax id pad	Some modems ignore the first four characters of the fax_id. If this value is set to true, the fax_id will be padded with the string "1111," so that all digits in the fax_id will be used.
set fax fail retry	This option defines the choice of resending a fax if a failure was detected during transmission.

New Tokens and Modified Tokens

Some new Tokens have been added to Release 2 software as well as some modifications to existing Tokens. These include:

KB(freq,ms)	Plays a tone on the channel. The value <i>freq</i> is the frequency of the tone and <i>ms</i> is the duration in milliseconds of the tone.
KC(uid,sac)	Compares value of <i>sac</i> (which may be a variable) to the security code for the User ID defined as <i>uid</i> (which may be a variable). If they are equal, processing continues to next token; otherwise processing is sent to value defined in Done chain.

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KD(msg,msgq [,uid])	<p>Deletes a message from the current mailbox or from specified User ID <i>[,uid]</i>. The value <i>msg</i> specifies the message number, and <i>msgq</i> may be:</p> <p>U Urgent message queue N New message queue S Saved message queue</p> <p>Any of the parameters may be variables.</p>
KI(substring,string,%Sn)	<p>Searches <i>string</i> for the first occurrence of <i>substring</i>. The result of the search is the position of the substring within the string, and is stored as the variable. For example, KI("d","abcdefg",%S0) will result in %S0 variable containing 4, because "d" is the fourth character in the string.</p> <p>The string and the substring may be variables</p>
KL(uid)	<p>Immediately logs caller into the specified <i>uid</i>.</p> <p>Note <i>Cannot be used in the Notification screen.</i></p>
KR(dest)	<p>Creates a recording. If the destination defined as <i>dest</i> is an existing User ID, then the recording is inserted into that mailbox as a new message. Otherwise, the destination is assumed to be the name of an existing file and the recording is placed there. The destination can be a variable.</p>
KV(file, field,value)	<p>Deletes a record from a database. If <i>file</i> is a filename ending with .dbf, then it is assumed to be in dBase format. Otherwise, it is the name of an ASCII file with columns separated by commas. The first record with the <i>value</i> in that column (if any) will be deleted. For ASCII files, <i>field</i> is actually a column number.</p> <p>All parameters may be constants or variables.</p>
N(filename, search-field,search-value, repl-field,new-value [,repl-field,new-value]..)	<p>This token can be used for updating the values of a database record. It searches a <i>filename</i>, which may be a .dbf (dBase) or ASCII file, for a record that has <i>search-value</i> in <i>search-field</i>. It then updates that record by replacing the existing <i>repl-field</i> with the <i>new-value</i>, and saving that record back to the database.</p> <p>ASCII files must be comma delimited. The <i>search-field</i> in a dBase file is the name of the dBf field. All parameters may be variables.</p>
X(filename)	<p>Creates a zero length file called <i>filename</i>.</p>
Y(filename)	<p>Deletes the defined <i>filename</i>.</p>
Z(filename)	<p>Checks for the existence of filename. If the file exists, the Done chain is executed. If the file does not exist, the system processes additional tokens.</p>

New "Replaced" Tokens

%A	<p>Allows the fax_dl_string (pbx access) value of the Stratagy Configuration Utility screen to be accessible as a token.</p>
%C	<p>Plays the current port number.</p>

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%F(n [,uid])	Reads fields from a User ID screen. If <i>n</i> is 1 then the Name1 field is read. If <i>n</i> is 2 then Name2 is read. If <i>n</i> is 3 the comment field is read. No other values of <i>n</i> are permitted. If the optional <i>[,uid]</i> is defined, fields are read from that mailbox; otherwise, they are read from the current mailbox.
%W	New Variable Token that represents the day of the week. Sunday is 1, Monday is 2, etc.
%X	Allows the defined value within the Telephone System Dial codes that puts a caller on transfer hold to be accessible as a token.

Enhanced Tokens

l(string,relationship, string,uid)	The <i>uid</i> may now be a variable.
+(%Sn[,item])	The <i>item</i> value is now optional. It defaults to the value of 1.
P(X,filename)	This addition to the P token makes it possible to play any voice file defined by <i>filename</i> .
P(Mn [,uid])	Plays the numbered message <i>n</i> in the saved message queue, if enabled, or the numbered message <i>n</i> in the saved message queue of the current User ID or the optionally defined <i>[,uid]</i> .
P(MUn [,uid])	Plays the numbered message <i>n</i> in the urgent message queue of the current User ID, or the optionally defined <i>[,uid]</i> .
P(MNn [,uid])	Plays the numbered message <i>n</i> in the new message queue of the current User ID, or the optionally defined <i>[,uid]</i> .
P(MSn [,uid])	Plays the numbered message <i>n</i> in the saved message queue of the current User ID, or the optionally defined <i>[,uid]</i> .
P(nn,V)	Plays a system prompt <i>nn</i> .
P(A, string)	Plays an alphanumeric string.
Q(G1,G2,E,G3,E)	<p>New parameter <i>E</i> that enables a caller to edit the answers to the questions that were posed. If an <i>E</i> is entered in the middle of a string then the answers to the questions that were posed will be grouped together.</p> <p>For example: Q(G1,G2,E,G3,E).</p> <p>The answers to questions posed in Greetings 1 and 2 are grouped together and the answer to the question in Greeting 3 is in a separate group.</p>
V(filename,field,item,field, %Sn [,field, %Sn]..)	<p>It is now possible for multiple fields <i>[,field, %Sn]</i> to be retrieved from an ASCII file or a .dbf database. There may be several pairs of fields and %Sn values, and all will be retrieved from the database. The filename, field, and item parameters may all be variables.</p> <p>Note <i>It is a new feature that allows the V token to read dBase formatted files. If the filename ends with '.dbf' the field numbers become field names, and dBase file processing is invoked (including record locking, if specified)</i></p>
?(item, file, uid)	The <i>file</i> parameter can now be a variable (%Sn).