

Strategy Release 3.1

This bulletin introduces the new Strategy 6D and Strategy 24D Voice Processing systems. It also introduces a new software release for the Strategy Flash and Strategy DK Voice Processing systems. For details on any of the following subjects, see the *R3 Strategy Installation & Maintenance Guide*, *Strategy Flash Installation Guide*, and *Strategy DK Installation Guide*. Most Strategy R2 systems can be upgraded to Strategy R3.1 (see [“Upgrade Strategy R2 Software/Hardware to R3” on Page 12](#)).

Hardware Description

Release 3.1 introduces two new hardware platforms to the Strategy product line, the Strategy 6D and Strategy 24D. The Strategy 24 Plus will continue to ship using the same Pentium®-based PC hardware platform as it has in the past but will come equipped with a Dialog/4™ four-port voice board from Dialogic®. There are no 3.1 hardware changes to the Strategy DK or the Strategy Flash.

Strategy 6D

The Strategy 6D (part number SG-6D) is a desktop PC consisting of a custom PC-based motherboard, a hard disk drive that provides up to 120 hours of storage, a 3.5” floppy disk drive, an internal modem board, and one serial port that supports either a host IVR connection or SMDI integration. The serial ports and VGA circuitry that supports the optional monitor is built onto the motherboard, eliminating the need for additional cards in the system.

The Strategy 6D comes standard with two voice ports built into the custom motherboard. Using an optional Dialogic Proline/2V™ or Dialog/4 voice board purchased from Toshiba, the voice ports can be expanded to four or six ports.

Strategy 24D

The Strategy 24D (part number SG-24D) is a desktop PC that comes equipped with a custom PC-based motherboard, a hard disk drive that provides up to 120 hours of storage, a 3.5” floppy disk drive, and four serial ports. The serial ports and VGA circuitry that supports the optional monitor is built onto the motherboard, eliminating the need for additional cards in the system.

The Strategy 24D comes standard with four voice ports built into the motherboard. The Strategy 24D supports a combination of Proline/2V, Dialog/4 and D/160SC-LS™ voice boards to reach a maximum of 24 voice ports.

A combination of up to four connections can be made to the Strategy 24D serial ports:

- ◆ Fax/Modem 1
- ◆ Fax/Modem 2

- ◆ IVR Host Connectivity
- ◆ SMDI Integration

Optional Equipment

Both the Strategy 6D and Strategy 24D will support keyboard and monitor connections as options. The Strategy 24D also supports the Fax Messaging, Fax on Demand and Fax Back as additional software features.

The Strategy 24 Plus will continue to ship with the keyboard, monitor and fax software as standard. See the R3 *Strategy General Description* for complete details on standard and optional equipment for all Release 3.1 Strategy systems.

A larger version of the Strategy 24D, the Strategy 24D-L (part number SG-24D-L), comes equipped with 20 voice ports. The Strategy 24D-L ships with the 16 port Dialogic D/160SC-LS voice board already installed. This system can have one additional Dialog/4 or two additional Proline/2V voice boards installed to reach the maximum 24 voice ports.

Release 3.1 Features

The following is list of Strategy 3.1 features. Many of these features already exist on the Strategy Flash 3.0 system currently being sold.

Year 2000 Compliance

The Strategy R3 systems are year 2000 compliant. Features that operate based on time of day, such as future delivery message, will not be adversely affected by the coming of the new millennium.

New Replaced %K Token

Using the %K token, Strategy can recognize the Calling Party Identification as sent from the connected switching systems through SMDI connection. See “SMDI Calling Party Identification” on Page 4 of this bulletin for details on this feature.

Trace Data Filter/Expander

The TRACE.OUT file on the Strategy system software no longer contains readable trace messages. Instead, it contains encoded trace messages that are unintelligible to the user.

Using a new Trace Filter Setup screen (Retrieve Trace File function), you can specify the filtering rules for selecting the desired trace records. After Strategy Admin filters the trace data, it decodes and expands the data into readable records containing the information requested by you.

Automatic System Recovery

To ensure successful startups and assist in debugging configuration problems, an Archive directory is now part of the Strategy system. The Archive directory consists of three subdirectories (i.e., Original, Good, and Suspect), each containing a version of the Strategy batch files, configuration files and voice mailbox database.

If an unsuccessful startup is detected by the program, Strategy copies the files in question to the Suspect subdirectory, shuts down and reboots using the files in the Good subdirectory. The Suspect files can be used to debug configuration problems.

Pending Messages

A new message classification called Pending has been added to the New Message Queue. This option is configured for each User ID Mailbox by setting the *Message Pending* field on the User Options screen to ON.

When the field is set to ON, the New Message Queue is divided into two classifications:

- ♦ New – A message that has never been played or played for less time than the time set in the *msg_pending_threshold* parameter (default is five seconds). The Message Waiting Light remains ON, and the message remains in the New Message Queue.
- ♦ Pending – A message played for longer than the time set in the *msg_pending_threshold* parameter. The Message Waiting Light is turned OFF, the message remains in the New Message Queue, and a Return Receipt is sent, if applicable.

See “New Parameters” on Page 4 for details on using the *msg_pending_threshold* parameter.

User Interface Enhancements

- ♦ New Strategy users will automatically hear a user-friendly Strategy tutorial upon logging in to his/her mailbox. The tutorial walks the user through the process of recording his/her name, recording a personal greeting and changing the default security code. For additional details, see the *R3 Strategy User Guide*.
- ♦ From the last message in the queue, the user can press **1** to go to the top of a queue.
- ♦ From the first message in the queue, the user can press ***2** to go to the bottom of a queue.
- ♦ If no messages are in the queue, the user is not prompted to “press **1** to play messages.”
- ♦ When a user logs on to his/her mailbox, the Strategy states the user’s name in addition to the number of messages in each queue, “Jane Doe. You have three new messages...”
- ♦ When listening to a reply message, a prompt now notifies the user that the message is a reply message.
- ♦ At the beginning of the Send Messages menu, the user can enter **04** for *multiple* destinations (e.g., personal list, User ID, system list) instead of the single destination (e.g., User ID, personal list) options. Entering **04** enables the user to address a message to all the recipients at the start of the menu.
- ♦ Messages marked for Return Receipt Requested send a receipt announcement for Pending messages.
- ♦ The Return Receipt Requested announcement now plays the original message along with the date and time that the message was played by the receiving mailbox. This assists the user in identifying the message.
- ♦ While recording a message to another mailbox in the system, the user can press **4** at any time to pause the recording. The message resumes recording as soon as **4** is pressed again. Strategy prompts “Begin recording... (Beep).”
If **4** is not pressed, Strategy gives the user an additional 30 seconds (default). If during this time no key is pressed, Strategy cancels the message. Pressing **#** returns the user to the Send Messages Menu.
- ♦ If new messages arrive while the user is accessing his/her mailbox, Strategy notifies the user, upon returning to the Main Menu, that a new message is in the queue.

Panic Notification Type

The Panic notification type has been added to the drop-down menu for the *Type* field on the Notify menu screen. When an unsuccessful restart occurs during the Automatic System Recovery, this field enables you to set a special notification type for the User ID Mailbox designated in the *error_box* parameter. Notification can then be sent to System Administrators or support personnel alerting them that an error has occurred on the system.

New Parameters

The new Release 3.1 software parameters are:

- ♦ *area_office* – When SMDI is being used on a Centrex switch, the value set in this parameter identifies which calls are from voice mail subscribers by specifying the first few digits (e.g., area and office codes) that are shared by all subscribers.
- ♦ *error_box* – Box that receives a notification if the system encounters a panic error on startup. The notification runs when the system successfully recovers.
- ♦ *msg_pending_threshold* – Number of seconds that a message must play before it is considered “pending.”
- ♦ *play_caller_id* – Determines whether outside Caller ID is announced when the Caller ID is available.
- ♦ *restore_config* – If the Strategy system encounters a panic error on startup, this parameter determines whether Strategy restores the last known good configuration during the Automatic System Recovery process.
- ♦ *restore_original* – If the Strategy system encounters a panic error on startup, this parameter determines whether Strategy restores the original configuration during the Automatic System Recovery process.
- ♦ *security_max_length* – Maximum length of the security code that Strategy accepts as a new security code when a user attempts to change it from a telephone.
- ♦ *security_min_length* – Minimum length of the security code that Strategy accepts as a new security code when a user attempts to change it from a telephone.
- ♦ *skip_name_announce* – Sets the name announcement at user log on.

System Administrator User ID

Strategy has a special User ID mailbox known as the System Administrator User ID mailbox. It is User ID 999, and you access it through the telephone just as any other User ID mailbox.

In addition to normal options available on the Main Menu, the System Administrator’s Main Menu includes a System Administration option (8). Starting with Strategy Release 3 software, two new functions are added to the menu:

- ♦ Reset User ID Security Code
- ♦ Add User’s Name to Directory

See the *Strategy System Administrator Guide* on the Strategy Library CD-ROM for details and procedures on using the other Strategy Administrator Menu options.

SMDI Calling Party Identification

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

When the Strategy is integrated via SMDI with a Strata DK telephone system that supports caller ID, new applications are available. Some examples of the new applications are adding the Calling Party ID to the message header, playing a specific greeting and routing a call based on the telephone number received.

AMIS Networking

Audio Messaging Interchange Specification (AMIS) is the analog networking protocol that enables Strategy to pass voice messages to any remote voice mail system that supports the AMIS protocol. Strategy DK with Release 3.1 will now have this feature.

Note This feature is not supported by the Strategy Flash.

New Shutdown Procedure

The Strategy can be shut down by the System Administrator using the telephone dial pad. New reserved User IDs 982 and 983 have been added to facilitate the telephone shutdown procedure. This feature cannot be used if Strategy Admin is connected.

Messaging Complaint Improvements

Strategy Release 3.1 software contains, as will all future releases of Strategy software, the same messaging complaint improvements announced with the Strategy Vxx.225, V4.2N, VDK.2N, and VSA.2N software. See Strategy bulletins SB40-0013 and TB40-0019 for details on the improvements.

Upgrade Strategy Flash Software

Notes

- *Make a copy of the new software disks as a backup. Destination disks should be scanned first for viruses and the new disks write protected after the copies are made.*
- *Due to the potential for error during any upgrade process, we recommend that all upgrade procedures be performed locally.*
- It is recommended that you back up any database prior to starting any upgrade procedure.
- Loading the Strategy Admin software can be done before/after connecting the Strategy Admin PC to the Strategy Flash.

Step 1: Load Strategy Admin Software (VSA.3x)

1. Insert the Strategy Admin disk into the floppy disk drive of the Strategy Admin PC.
2. Access the DOS prompt (C:\).
3. To begin the installation procedure, type

```
a:install c:\admin3x
```

where: x = the version letter of the Admin software you are installing.
4. Press any key to continue.

```
Install Remote Strategy Admin software package to C:\ADMIN3??
Press Ctrl+C to abort or press any key to continue...
```

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The Strategy Admin program is installed on drive C: in subdirectory **ADMIN3x**.

Step 2: Upgrade Strategy Flash (VDK.3x) Software

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

```

Strategy Admin Version VSA.3x Aug 18 1998

1.Connect to Strategy
2.Configure Admin

ESC/Exit F1/Help

```

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Important! *The Strategy Admin PC must be configured for the correct serial port in Strategy Admin prior to performing the next step. (See the R3 Strategy I&M, Chapter 3 – Configure Strategy for configuration instructions.)*

- Press **1** or highlight the Connect to Strategy option and press **Enter**.
- Enter the password (the default is **Strategy**) and press **Enter**.

The Admin software prompts for the system password.

The following messages display while the Strategy Admin software checks for the Strategy Admin PC's connection to Strategy:

```
Preparing for connection. Please wait.
```

```

STRATAGY Vxx.xx/x.x Aug 15 1998 17:46:49
Copyright (c) 1994-8 Toshiba America Information Systems, Inc.
Portions copyright (c) 1991-1995 The Automatic Answer, Inc.
All Rights Reserved.

```

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The Main Menu displays.

- Press **Alt+t** for the Tools submenu.
- Enter the password (the default is **Strategy**) and press **Enter**.
- From the Tools menu, press **3**.

You are prompted for your password.

The Tools submenu displays.

```

Upgrade

WARNING: Strategy Voice Processing will be
suspended. Any existing connection
will be broken.

Upgrade from directory :
A:

ESC/Exit F1/Help

```

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- Place the upgrade disk into the Strategy Admin PC's floppy-disk drive.

8. The default directory is A:. If you need a different drive, type over the default. Press **Enter**.

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

```
Upgrade successful. Press any key to reboot Strategy.
```

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9. Press any key to reboot.

If the software was loaded from the Strategy Configuration Utility menu, the system restarts and the Main Menu displays.

If the software was loaded from the DOS prompt, the DOS prompt displays.

Upgrade Strategy DK Software

Notes

- *Make a copy of the new software disks as a backup. Destination disks should be scanned first for viruses and the new disks write protected after the copies are made.*
- *Due to the potential for error during any upgrade process, we recommend that all upgrade procedures be performed locally.*
- It is recommended that you back up any database prior to starting any upgrade procedure.
- Loading the Strategy Admin software can be done before/after connecting the Strategy Admin PC to the Strategy DK.

Step 1: Load Strategy Admin Software (VSA.3x)

1. Insert the Strategy Admin disk into the floppy disk drive of the Strategy Admin PC.
2. Access the DOS prompt (C:\).
3. To begin the installation procedure, type

```
a:install c:\admin3x
```

where: x = the version letter of the Admin software you are installing.

```
Install Remote Strategy Admin software package to C:\ADMIN3??
Press Ctrl+C to abort or press any key to continue...
```

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

4. Press any key to continue.

The Strategy Admin program is installed on drive C: in subdirectory **ADMIN3x**.

Step 2: Load System Voice Prompts onto Stratagy Admin PC (VSA.3x)

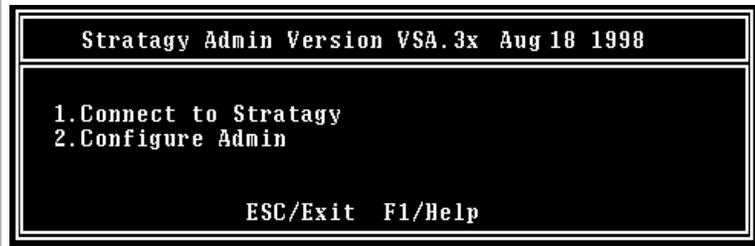
1. Insert Disk 1 of 8 into the floppy disk drive of the Stratagy Admin PC.
2. Access the DOS prompt (C:\).
3. To begin the installation procedure, type
a:install c:\admin3x
 where: x = the version letter of the Admin software you are installing.
4. Follow the instructions for inserting each disk into the floppy drive.
5. Press any key to continue.

The Stratagy System Voice Prompts are installed on drive C: in subdirectory **ADMIN3x**.

Step 3: Copy System Voice Prompts from Stratagy Admin PC to Stratagy DK (VSA.3x)

Important! *At the fastest data transmission speed of 9600 baud, this process takes approximately four hours to complete.*

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



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Important! *The Stratagy Admin PC must be configured for the correct serial port in Stratagy Admin prior to performing the next step. (See the R3 Stratagy I&M, Chapter 3 – Configure Stratagy for configuration instructions.)*

2. Press **1** or highlight the Connect to Stratagy option and press **Enter**.

The Admin software prompts for the system password.

3. Enter the password (the default is **Strategy**) and press **Enter**.

The following messages display while the Strategy Admin software checks for the Strategy Admin PC's connection to Strategy:

```
Preparing for connection. Please wait.
```

```
STRATAGY Vxx.xx/x.x Aug 15 1998 17:46:49
Copyright (c) 1994-8 Toshiba America Information Systems, Inc.
Portions copyright (c) 1991-1995 The Automatic Answer, Inc.
All Rights Reserved.
```

3441

The Main Menu displays.

You are prompted for your password.

4. Press **Alt+t** for the Tools submenu.
5. Enter the password and press **Enter**.
6. From the Tools menu, press **8**.

The Tools submenu displays.

Filecopy
Source System:
Copy From:
Copy To:
ESC/Exit F1/Help

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7. In the *Source System* field (where the file currently resides), press **F2** to display a pop-up box of selections.
8. Highlight **PC** to copy from the Strategy Admin PC. Press **Enter**.
9. In the *Copy From* field, type **ENGLISH.IDX**. Press **Enter**.
10. In the *Copy To* field, type **C:\STRATAGY\ENGLISH3.IDX**. Press **Enter**.

This directs Strategy Admin to copy the file ENGLISH.IDX from the C:\ADMINx directory.

While Strategy DK copies the file, this dialog status box displays:

```
File copying: Strategy → Local, Received 8192 bytes (53%)
```

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The ENGLISH.IDX file has been copied from the Strategy Admin PC to the Strategy DK hard drive under the new file name "ENGLISH3.IDX."

11. Press any key to continue.

Step 4: Configure Strategy DK to Use R3 System Prompt File (ENGLISH3.IDX)

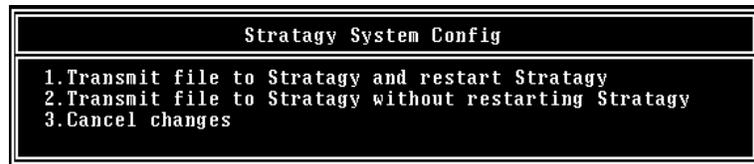
1. From the Tools menu, press **6**.
2. Highlight the parameter 'set prompt_file' in the Strategy Configuration screen. Press **Enter**.
3. Using the right arrow on the keyboard, place the cursor at the end of the line and beneath the single quote (').
4. Type **3** with no space so that it reads 'ENGLISH3'.
5. Press **Enter**.
6. Press **ESC**.

The system configuration file displays. The parameters are listed in alphabetical order.

The parameter and its setting displays at the top of the screen.

Important! Make sure to include the single quote. If a parameter is not encompassed by single quotes, Strategy DK will not boot properly.

The Strategy System Configuration screen displays the changed parameter.



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7. From the Strategy System Config screen, press **2**.

The changes are transmitted to Strategy DK but Strategy DK is not shut down or restarted. Until you restart Strategy DK in Step 5, the changes do not take effect.

Step 5: Upgrade Strategy DK (VDK.3x) Software

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



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Important! The Strategy Admin PC must be configured for the correct serial port in Strategy Admin prior to performing the next step. (See the Strategy I&M, Chapter 3 – Configure Strategy for configuration instructions.)

2. Press **1** or highlight the Connect to Strategy option and press **Enter**.

The Admin software prompts for the system password.

3. Enter the password (the default is **Strategy**) and press **Enter**.

The following messages display while the Strategy Admin software checks for the Strategy Admin PC's connection to Strategy:

```
Preparing for connection. Please wait.
```

```
STRATAGY Vxx.xx/x.x Aug 15 1998 17:46:49
Copyright (c) 1994-8 Toshiba America Information Systems, Inc.
Portions copyright (c) 1991-1995 The Automatic Answer, Inc.
All Rights Reserved.
```

3441

The Main Menu displays.

You are prompted for your password.

4. Press **Alt+t** for the Tools submenu.
5. Enter the password (the default is **Strategy**) and press **Enter**.
6. From the Tools menu, press **3**.

The Tools submenu displays.



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7. Place the upgrade disk into the Strategy Admin PC's floppy-disk drive.
8. The default directory is A:. If you need a different drive, type over the default. Press **Enter**.

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

```
Upgrade successful. Press any key to reboot Strategy.
```

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9. Press any key to reboot.

If the software was loaded from the Strategy Configuration Utility menu, the system restarts and the Main Menu displays.

If the software was loaded from the DOS prompt, the DOS prompt displays.

Step 6: Add User ID Mailboxes 982 and 983

These mailboxes support the “Shutdown using the Telephone Dial Pad” feature described in the *Strategy DK Installation Guide*. They are not available in the software when upgrading an existing system from R2 to R3 and must be manually programmed. If they are not added, the Shutdown using the Telephone Dial Pad feature is not functional.

- For User ID 982, define the Users record to contain:

Extension	@P (378 , V) G (991)
@	Suppresses normal process.
P(378,V)	Plays prompt in User ID 378 stating the security code entered is invalid.
G(991)	Goes to User ID 991.

- For User ID 983, define the Users record to contain:

Extension	@R (G1 , %S1 , 30) KC (%U , %S1) KS (0) G (991)
@	Suppresses normal process.
R(G1,%S1,30)	Plays greeting 1. Waits 3 (30/10) seconds for the caller to enter a security code. If no code entered, goes to box 991. If a code is entered, Strategy reads the DTMF the caller entered into variable %S1.
KC(%U,%S1)	Compares the security code in %S1 to the security code in %U (User ID 983 security code). If the security codes match, continues to next token. If security codes don't match, goes to Done Chain.
KS(0)	Strategy shuts down immediately.
G(991)	Goes to User ID 991.
Done Chain	982

Access Strategy DK/Strategy Flash

Installation instructions and accessing procedures are included in the new *Strategy DK Installation Guide* or *Strategy Flash Installation Guide*.

Upgrade Strategy R2 Software/Hardware to R3

The following Strategy R2 products can be upgraded to Strategy R3 software and hardware: Strategy 4, 6, 6L, 12L, 16, 24, and Strategy 24 Plus.

The number of voice ports and type of Dialogic boards supported are listed below:

Strategy System	Dialogic Boards
Strategy 4, 6, 6L	Maximum 6 voice ports Combination of Dialog/4 and ProLine/2V boards.
Strategy 12L, 16, 24, 24 Plus	Maximum 24 voice ports Combination of Dialog/4 and ProLine/2V boards

Note See the Chapter 16 – Maintenance and Upgrades of the *Strategy R3 I&M* for details.

Documentation

New Stratagy Release 3.1 documents available on FYI and the Stratagy CD-ROM Library are:

- ♦ *Stratagy General Description*
- ♦ *Stratagy User Guide/Stratagy Quick Reference Guide*
- ♦ *Stratagy Installation and Maintenance Manual*
- ♦ *Stratagy Flash Installation Guide*
- ♦ *Stratagy DK Installation Guide*
- ♦ *Stratagy System Administrator Guide*

Notes

- The *Stratagy Feature Description Manual* has been discontinued. Feature description and controls are in the *Stratagy General Description* and Chapter 5 – Feature Programming of the *Stratagy I&M*.
- The *Stratagy User Guide*, *Quick Reference Guide*, and *Stratagy Advisor* CD-ROM are included in the Stratagy documentation packs.

Stratagy Advisor

An interactive End User Tutorial CD-ROM called Stratagy Advisor is included with every system shipped with Release 3.1 software. This Tutorial can assist you in providing training for your customers on the most commonly used Stratagy features.

Stratagy Advisor covers topics on how to personalize a user's mailbox; how to play, forward, reply, and send messages; ways to add additional destinations; set urgent delivery; manage mailbox; set security code; and re-record a name. To make it easy for users to get additional information on all of the Stratagy's features, we have also included an on-line user guide in Stratagy Advisor.