



Implementation and Service Release Notes

Upgrading to Octel 100 Release 3.1

This note provides steps for upgrading the following versions to Octel 100 Version 3.1.:

- Octel Overture PC/Octel Signature Performer 1.0 and higher
- CEO 2.1.6

Only the versions listed above are supported for upgrade directly to Octel 100 Version 3.1. If the currently installed version is not listed above, you must first complete the appropriate upgrade note to a supported version. Contact your authorized representative for information.

This note is broken into the following sections. Make sure you read and complete only the sections that apply to you:

- **Required Materials (page 2):** provides a list of the possible materials that may be required for the migration and/or upgrade. Everyone should read this section.
- **What's New in Octel 100 Version 3.1 (page 3):** lists new features and changes in Version 3.1 of Octel 100. Everyone should read this section.
- **Migrating the Messaging System to a New PC (page 4):** provides the steps necessary to upgrade the PC platform to a Pentium-level PC. Complete this section only if the messaging system is **not** currently running on a Pentium-level PC. A table with minimum hardware requirements is provided in this section. Contact a technical support representative if you are not sure whether a PC migration is required before you attempt the software upgrade.
- **Upgrading from Overture PC/Overture Signature Performer 1.0 and Higher (page 10):** provides the steps for upgrading the messaging software from OPC/OSP 1.0 and higher to Octel 100 Version 3.1. Complete this section if the messaging system is currently running OPC or OSP 1.0 or higher.
- **Upgrading from Compass Enhanced Office 2.1.6 to Octel 100 Version 3.1 (page 23):** provides the steps for upgrading the messaging software from CEO 2.1.6 to Octel 100 Version 3.1. Complete this section only if the messaging system is currently running CEO 2.1.6.
- **Issues Addressed in Octel 100 Version 3.1 (page 32):** lists the issues that have been addressed in Octel 100 Version 3.1. Everyone should read this section.

Required Materials

The following materials may be required for the upgrade. Make sure that you have the required materials available before beginning the upgrade:

- A medium you can use to back up files on the system, such as diskettes or a tape backup device (If you are migrating to a new PC, make sure that the medium you select is supported on both PCs)
- Any hardware required to upgrade the system, including voice or fax boards, RAM, or a Sentinel device, as well as accessory tools you may need, such as a screwdriver
- A sentinel upgrade utility (SUU) or a new Sentinel, if required
- An anti-static wrist strap, if you will be handling voice or fax boards
- LinkWiz software and parallel cable (if migrating to a new PC)
- BackPak external CD-ROM and BackPak disk (only if you are **not** migrating and the PC is **not** equipped with an internal CD-ROM drive)
- Messaging Application Version 3.1 CD-ROM
- The PC manufacturer's documentation, if you are upgrading RAM
- *Implementation and Service Manual*

Procedures in this note assume that the hard drive on which the system is installed is drive C, that any additional hard drive that may be installed is D, that the disk drive is A, and that the CD-ROM drive, if installed, is E. Drive designations on the specific PC on which you are working may vary. Confirm the appropriate drive letters, when necessary, in procedures provided in this note.

What's New in Octel 100 Version 3.1

The following technical changes have been incorporated into Octel 100 Version 3.1. In addition, a list of issues addressed in this version of the software is provided under the topic, "Issues Addressed in Octel 100 Version 3.1," at the end of this document.

- **Year 2000 support**—Octel 100 Version 3.1 is millennium-compliant.
- **New dialing and transfer codes**—Support for two new dialing/transfer codes has been added to Octel 100 Version 3.1. Detailed information on how to use dialing codes is provided in Chapter 16, "Managing System Mailboxes," in the *Implementation and Service Manual*. Detailed information on how to use custom transfer codes is provided in Chapter 13, "Setting Up the System," in the *Implementation and Service Manual*:
 - B** Aborts the transfer if a busy (or reorder) signal is received from the switch after the extension is dialed. Otherwise, the transfer is completed as an unsupervised transfer. This code should only be used on switches, such as the Lucent PARTNER®, that do not allow completion of transfers into busy or reorder tone. When using this code, Max Rings in the Class of Service **must** be set to 0; otherwise, this code is ignored.
 - W(Number)** Instructs the switch to wait the specified number of seconds for recognized dial tone. If dial tone is not detected, a busy release code is sent if an R is included in the string immediately following the W(number). The transfer is then reattempted starting at the beginning of the customer transfer code string. If it fails again, the caller hears the busy options. Valid settings are 0 - 9, where 1 through 9 indicate the number of seconds to wait, and 0 indicates that the system should wait up to 60 seconds. The suggested setting is W5. Note that this code must be set higher than the DTONWAIT parameter because DTONWAIT determines the amount of continuous energy the system must detect to recognize it as dial tone.
- **System Setup parameter default optimization**—Several System Setup utility parameter defaults have been modified to optimize their effectiveness. A list of the System Setup parameters changed and their new defaults is provided under the topic, "Issues Addressed in Octel 100 Version 3.1," at the end of this document.
- **CEO Product Upgrade support**—CEO product users can upgrade to Octel 100 Version 3.1.
- **Overall functionality improvements**—A number of issues have been addressed to improve overall system functionality and reliability. For a list of the issues addressed, see the topic, "Issues Addressed in Octel 100 Version 3.1," at the end of this document.

Migrating the Messaging System to a New PC

Depending on the current Octel system PC configuration, you may need to migrate the messaging system to a new PC that meets the minimum hardware requirements. The following table provides the minimum CPU and memory requirements for Octel 100 Version 3.1.

Voice Ports	System without Visual Mailbox	System with < 50 Visual Mailbox Clients	System with 50 - 250 Visual Mailbox Clients
4	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM
8	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM
12	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM
16	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 16 MB RAM	Pentium 75 w/ 24 MB RAM

Contact a technical support representative if you are not sure whether a PC migration is required before you attempt the software upgrade. If a PC migration is required, complete the following procedure to transfer files on the current Octel system to the new PC.

In this procedure, the existing Octel system is referred to as the “current messaging system.” The PC to which you are transferring the existing Octel system is referred to as the “new messaging system.”

WARNING: Use caution when handling boards, such as voice boards or network interface cards, as they are electrostatic-sensitive. Be sure you ground the PC, the work area, and the ground end of the antistatic wrist strap prior to handling a board, and always use antistatic wrist straps and/or electrostatic-dissipative mats while handling a board.

Shut down the voice mail system on the current messaging system if it is running:

1. Log into the messaging system as a Level 2 or 3 supervisor.
2. To shut down the system, select Exit from the File menu. A dialog box displays prompting whether you want to shut down the system.
3. Click OK to perform the shutdown. A dialog box displays prompting you to wait for channel activity to cease. Do not click Force. When all the ports are inactive, the system shuts down.

Test the UPS:

Complete this procedure if the current messaging system is connected to a UPS:

1. Unplug the UPS power cord from the electrical outlet.
2. Verify that the current messaging system continues to run (the UPS will beep to indicate that it is supplying power to the PC).

If the PC turns off when you remove the UPS power cord from the electrical outlet, verify that the UPS is connected properly. If the UPS is connected properly, contact a technical support representative.

3. Plug the UPS power cord back into the electrical outlet.

Run Quick Assist Update Partial on the Current Messaging System:

1. Double-click the Octel icon to open the Octel folder.
2. Double-click the Quick Assist icon in the Octel folder. The Quick Assist dialog box displays.
3. Click Recover Files. The Recover Files dialog box displays.
4. In the Drive where \cvr1 files are located field, verify that the displayed drive is the drive where the \CVR1 directory is located.
5. In the Mailbox to receive unattached messages field, enter the mailbox in which you want the system to place messages with invalid header information. (Unattached messages with valid header information are placed in the new message queue of the receiving mailbox.) Messages are only put in this mailbox if the Delete unattached messages option is disabled.
6. Under Recovery Mode, select the Update (partial) option.
7. Under Recovery Options, select the Ask before creating a mailbox option if you want the system to prompt you for confirmation before it creates mailboxes. The system creates mailboxes when it finds messages or greetings that are linked to a mailbox number that does not exist. If you deselect this option, the system automatically creates the mailboxes indicated by the message or greeting links.
8. Under Recovery Options, select the Delete unattached messages option if you want the system to automatically delete unattached messages. If you disable this option, unattached messages with valid header information are placed in the mailbox in the message header, and unattached messages with invalid header information are placed in the mailbox you specified in step 5.
9. In the Report Filename field, enter the name of the report you want the system to generate. The default is QASSIST.RPT.
10. Under Report Options, select the Send to File option if you want to create a report file. When you select this option, the system creates a report with the specified filename in the \CVR1 directory. If you deselect this option, the report is only available by selecting the View Report option.
11. To begin the update, click Start. The Recover Status dialog box displays. The system copies the files in the \CVR1 directory into a directory named \~REPAIR~. Do not delete the files from the \~REPAIR~ directory until you are confident the system has corrected any file damage.
12. The Searching Directory and Processing Mailbox fields display the directory and mailbox currently being processed. The Errors and Warnings fields reflect the respective number of errors and warnings the system encounters during the update.
13. When the partial update is complete, you can click Edit Mailboxes to reenter or modify information that may have been lost. The Mailbox Quick Edit dialog box displays with information for the first mailbox.

This dialog box includes general identification information about each system mailbox, including the First and Last Name, Company, and Division. The Messages box displays the number of recovered New and Saved messages.

You can click the Next and Previous buttons to move through the mailboxes. Click Save to save any edits you make. When you finish making any edits, click OK to return to the Recover Status dialog box.
14. Click OK. The Recover Files dialog box displays.

15. To display the report, click View Report. If the system detected errors or warnings during the update, the appropriate corrective action is suggested in the report. If Quick Assist recommends further action, such as performing an Update All or Rebuild All, contact a technical support representative before continuing.
16. When you finish viewing the report, click the window icon in the upper-left corner and select Close. The Recover Files dialog box displays.
17. Click Cancel. The Quick Assist dialog box displays.
18. To close Quick Assist, click Exit.
19. Double-click the icon in the upper-left corner of the folder window to close it.

Modify the current messaging system's COM Port assignments:

The new messaging system has new COM Port assignments for the UPS Integrator and for Serial integration. If the current messaging system is using either the UPS Integrator or Serial Integration, complete the following steps to modify the COM Port assignments as necessary for the migration.

To modify the UPS Integrator COM Port settings:

1. Press <CTRL+ESC> to open the Window list.
2. From the Window List, double-click on UPS Integrator. The UPS Integrator dialog box displays.
3. From the Options menu, select Setup. The UPS Setup dialog box displays.
4. In the Port field, change the setting to 1.
5. Click Save, then click OK. The UPS Setup dialog box displays.
6. Double-click the icon in the upper-left corner of the dialog box to close the UPS Integrator.

To modify the SI.CFG file for systems running Serial integration:

1. Open an OS/2 window.
2. From the C: prompt, type `E C:\CVR\SI.CFG` and press <ENTER>. The contents of the SI.CFG file display. The first line of the file should identify the PORT setting.
3. Place the cursor after the current COM Port number (you can press <END> to place the cursor at the end of the first line), press <BACKSPACE> to delete the current number, and type 4.
4. Select Save from the File menu. If this is the first time you have saved the file, the Save Notification dialog box displays.
 - a. Click Type. The Type dialog displays.
 - b. Click Plain Text, then click Set. The file is saved.
 - c. Double-click the icon in the upper-left corner of the window to close the editor.
5. To close the OS/2 window, type `EXIT` and press <ENTER>.

Shut down any open applications on the current messaging system:

1. Press <CTRL+ESC> to open the Window menu.
2. Highlight any application with the exception of the OS/2 desktop or the LaunchPad. (Some systems will not have a LaunchPad.)
3. Click the right mouse button once on the highlighted application.
4. Select Close.
5. Repeat steps 2 – 4 for each application listed in the Window menu.

Prepare the PCs for the file transfer:

1. If a printer is attached to the current messaging system, unplug the printer's parallel cable from the back of the Sentinel.
2. Remove the Sentinel from the parallel port of the current messaging system.
3. Connect the LinkWiz cable to both PCs:
 - a. Connect one end of the LinkWiz parallel cable to the parallel port of the current messaging system.
 - b. Connect the other end of the LinkWiz parallel cable to the parallel port of the new messaging system.
4. Turn on the new messaging system PC.

Perform the file transfer:

1. Launch the file transfer on the new messaging system:
 - a. Insert the disk labeled "Migration Diskette for New Computer" into the disk drive of the new messaging system PC.
 - b. Open an OS/2 window. The C: prompt displays.
 - c. From the C: prompt, type MD MIGRATE and press <ENTER>. A new directory named MIGRATE is created on the C: drive.
 - d. From the C: prompt, type CD MIGRATE and press <ENTER>. The \MIGRATE directory prompt displays.
 - e. From the \MIGRATE directory prompt, type XCOPY A: and press <ENTER>. The contents of the disk are copied to the \MIGRATE directory.
 - f. From the \MIGRATE directory prompt, type NEWCOMP and press <ENTER>. Note that the file transfer activity is not displayed on the new messaging system PC.
2. Launch the file transfer on the current messaging system:
 - a. Insert the disk labeled "Migration Diskette for Old Computer" into the disk drive of the current messaging system.
 - b. On the current messaging system, open an OS/2 window. The C: prompt displays.
 - c. From the C: prompt on the current messaging system, type A: and press <ENTER>. The A: prompt displays.
 - d. From the A: prompt, type OLDCOMP and press <ENTER>. There will be a slight delay before the file transfer begins. The following directories will be transferred from the current messaging system to the new PC: CVR, CVR1, REC00 through REC09, and FAX00 through FAX09. The files are listed onscreen on the current messaging system as they are transferred. Only directories containing files are

transferred. Note that as each directory is copied, the PCs disconnect then reconnect.

The file transfer may take up to 2 hours depending on the size of the database, the number of backups, etc. When the transfer is finished, the message "File transfer complete" displays on both PCs.

3. Once the file transfer is complete, verify that all necessary files were copied by comparing the "bytes used" in each of the copied directories on both PCs. For example, to compare the \CVR directories:
 - a. On the current messaging system, from the A: prompt, type C: and press <ENTER>. The C: prompt displays.
 - b. From the C: prompt, type CD CVR and press <ENTER>. The \CVR directory prompt displays.
 - c. From the \CVR directory prompt, type DIR and press <ENTER>. The contents of the \CVR directory on the current messaging system display.
 - d. On the new PC, from the \MIGRATE directory prompt, type CD . . \CVR and press <ENTER>. The \CVR prompt displays.
 - e. From the \CVR directory prompt, type DIR and press <ENTER>. The contents of the \CVR directory on the new messaging system display.
 - f. Compare the number of bytes used in each directory. If they are not the same, contact a technical support representative. If a directory on the new system is empty, repeat steps 1f and 2d to re-run the batch files on both systems. The files that have already been successfully transferred will generate an error message that the file already exists on the new system. Verify that the directory that was not copied is successfully migrated to the new system.

The number of files on the new messaging systems may be slightly different than the number of files on the current messaging system because not all subdirectories are copied to the new messaging system. This does not affect messaging system operation.

4. Remove the migration diskettes from both the current messaging system and the new messaging system.
5. If a tape backup is installed in the current messaging system to perform regular backups and a tape backup is installed in the new messaging PC, you must copy the .CMD and .FSS files to the new messaging system PC:
 - a. Insert a blank, formatted disk in the disk drive of the current messaging system.
 - b. From the \CVR prompt in the OS/2 window on the current messaging system PC, type CD . . and press <ENTER>. The C: prompt displays.
 - c. From the C: prompt, type COPY C:\BACKMAST\FSS*.FSS A: and press <ENTER>. The file is copied to the disk.
 - d. From the C: prompt, type COPY C:\BACKMAST*.CMD A: and press <ENTER>. The file is copied to the disk.
 - e. Remove the disk from the current messaging system and insert the disk in the new messaging system.
 - f. From the \CVR prompt in the OS/2 window on the new messaging system PC, type CD . . and press <ENTER>. The C: prompt displays.
 - g. From the C: prompt, type COPY A:*.FSS C:\BACKMAST\FSS and press <ENTER>. The .FSS file is copied to the new messaging system PC.

- h. From the C: prompt, type `COPY A:\*.CMD C:\BACKMAST` and press `<ENTER>`. The .CMD file is copied to the new messaging system PC.
6. Shut down the current messaging system PC:
 - a. To close the OS/2 window, type `EXIT` and press `<ENTER>`.
 - b. Click the right mouse button on an empty area of the desktop and select Shutdown from the menu that displays. When you are prompted whether you want to close all windows and active programs, click OK.
 - c. When prompted that the shutdown is complete, turn off power to the PC.
 - d. Disconnect the LinkWiz cable from the parallel port.
 - e. Disconnect the PC from the UPS, if the system is connected to a UPS. If you were using UPS integration, you must also unplug the serial communications cable.
 - f. If the current messaging system is enabled for Visual Mailbox and a token ring card is installed in the PC, you must remove it so that it can be installed in the new messaging system PC:
 - i. Unplug the network connection cable or jack from the token ring card.
 - ii. Remove the cover from the current messaging system PC.
 - iii. Unfasten the retaining screw from the token ring card's metal bracket.
 - iv. Remove the token ring card from the PC.
 - v. Replace the PC's cover.
7. Verify that the new messaging system is set to the correct time:
 - a. In the OS/2 window, type `TIME` and press `<ENTER>`.
 - b. Verify that the time displayed is correct:
 - If the time displayed is correct, press `<ENTER>`.
 - If the time displayed is incorrect, enter the new time in HH:MM format and press `<ENTER>`.
8. To close the OS/2 window on the new messaging system, type `EXIT` and press `<ENTER>`.
9. If the person or group who will be maintaining the messaging system owns an RSM Manager license, you must set up the new messaging system PC to recognize the Manager. Complete step 58 in the topic, "Installing the Remote Services Management Software," in Chapter 6, "Installing the Software," in *the Implementation and Service Manual*.
10. Disconnect the LinkWiz cable from the parallel port on the new messaging system and attach the Sentinel to the parallel port.
11. Proceed with the software upgrade on the new machine.

Upgrading from Overture PC/Overture Signature Performer 1.0 and Higher

Systems currently running OPC/OSP Version 1.0 and higher can upgrade directly to Version 3.1.

Upgrade Considerations

Be aware of the following considerations before beginning the upgrade:

- A BackPak external CD-ROM is used for upgrades on PCs that do not have an installed CD-ROM drive. Instructions for connecting and using the BackPak are provided in the upgrade procedure.
- Call handling changes made in previous versions may affect how call flow applications are set up after you upgrade the system. For comprehensive call flow functionality matrices for the current version of the software, see Prompts Voiced Under Specific Call Handling Conditions in Chapter 24, "Troubleshooting the System," in the *Implementation and Service Manual*.
- On systems upgrading from version 1.0x, group distribution lists are converted to accommodate 50 mailboxes per list.
- On systems upgrading from version 1.0x, settings for the INRINGS and inbound and outbound channels are carried over to a new Port Parameters tab in System Setup. You must enable the Application option for each port that is allowed to use V-Edit in Visual Architect or Visual Mailbox.
- Existing V-Trees, whether they were created on screen or through the keypad interface, are converted to accommodate the new Visual Architect V-Tree generation tool on systems using Visual Architect.
- Message Confirmation data is not retained after the conversion.
- Octel 100 supports Daylight Savings Time. If your PC or other software packages support this feature, be sure to deactivate this feature in Octel 100. Note that this feature is based on North American standards. If the messaging system location is based on a different standard, disable this feature in Octel 100 and enable it on the PC or in another software package, if available.
- On systems upgrading from version 1.0x, new features, such as Follow-Me-Forward on the Class of Service dialog box and Personal Fax Number on the Subscriber Settings dialog box will be set to the Octel 100 default values.
- If you are upgrading from OPC Version 1.02 and there are fax events that have not yet occurred, the events will be successfully performed after the conversion. However, fax errors may be written to the log file even though the events were successful. If this occurs, ignore these errors.

WARNING: On existing Octel systems that have custom phrase files in the ENGLISH1.O32 or ENGLISH2.O32 files, you must use V-Edit to manually restore the custom phrases after the upgrade is complete. This is required because new phrases have been added to the messaging system and the phrases may not have the same assigned number. Therefore, you must back up the phrase files and compile a list of the custom phrase numbers before you perform the upgrade.

Performing the Upgrade from Overture PC/Overture Signature Performer 1.0 or Higher to Octel 100

Complete the following procedures to successfully upgrade to Version 3.1.

Prepare the system for the software upgrade:

1. Shut down the Octel system if it is running:
 - a. Log into the messaging system as a Level 2 or 3 supervisor.
 - b. To shut down the system, select Exit from the File menu. A dialog box displays a message prompting you to indicate how to shut down the system.
 - c. Click OK to perform the shutdown. A dialog box displays a message asking if you want to wait for channel activity to cease. Wait for channel activity to cease. Do not click Force. When all the ports are inactive, the system shuts down.
2. If the system is using a Serial integration, back up the COM n .CFG file, where n represents the port number, from the \CVR directory. For example, to back up a COM1.CFG file to disk:
 - a. Insert a blank, formatted disk in the A: drive.
 - b. Open an OS/2 window. The C: prompt displays.
 - c. From the C: prompt, type `COPY C:\CVR\COM1.CFG A:` and press <ENTER>. The COM1.CFG file is copied to the disk.

If you completed the procedure, "Migrating the Messaging System to a New PC," skip to the procedure, "Perform the software upgrade."

3. You must run the Configure utility to record the settings of the installed voice boards:
 - a. Double-click the Configure icon in the Octel folder. The Configure dialog box displays. Under Installable Hardware, select the type of voice board installed in the messaging system and click Configure. The Configure dialog box displays the board information.
 - b. Record the following information, which you will need to reenter after the upgrade is complete:

Voice Board Type	_____
Hardware Interrupt	_____
Shared Memory Addresses	_____
 - c. Click Cancel. The Configure dialog box displays.
 - d. Click Exit. You are prompted to reboot the system for changes to take effect. **Do not reboot at this time** since you made no change.

4. Run Quick Assist in Update (Partial) mode. See the procedure, "Running Quick Assist," under the section, "Migrating the Messaging System to a New PC," for information on running Quick Assist.
5. Verify that there is sufficient space on the hard drive for the upgrade:
 - a. Open an OS/2 window.
 - b. From the C: prompt, type `DIR` and press <ENTER>. At the end of the file listing, the bytes free is listed.
 - c. Verify that there is at least 100,000,000 bytes free (100MB). If there is not at least 100,000,000 bytes free, contact a technical support representative before continuing.
 - d. Type `EXIT` and press <ENTER> to close the OS/2 window.
6. If you are using a BackPak external CD-ROM to upgrade, complete the following steps to copy the files necessary to run the BackPak to the PC:
 - a. Insert the disk labeled BackPak CD-ROM Disk in the PC's disk drive.
 - b. Open an OS/2 window and, from the C: prompt, type `A:` and press <ENTER>. The A: prompt displays.
 - c. From the A: prompt, type `BPADD` and press <ENTER>. The necessary files are copied to the PC. When the files are copied, a message displays warning you **not** to run the BPADD command again. It is very important that you run this command only **once**. Otherwise, the PC will not operate properly.
 - d. Remove the disk from the disk drive.
 - e. Type `EXIT` and press <ENTER> to close the OS/2 window.
7. Shut down any open applications (for example, UPS, SMDI) and windows except the OS/2 desktop and the LaunchPad:
 - a. Press <CTRL+ESC> to open the Window menu.
 - b. Highlight any application you see with the exception of the OS/2 desktop or the LaunchPad.
 - c. Click the right mouse button once on the open application.
 - d. Select Close.
 - e. Repeat steps 7a – d for each open application.
8. Shut down the PC:
 - a. Select Shutdown from the LaunchPad. When you are prompted whether you want to close all windows and active programs, click OK.
 - b. When prompted, turn off power to the PC.
9. If you are using the BackPak CD-ROM for the upgrade:
 - a. If a printer is currently attached to the messaging system Sentinel, disconnect the printer cable from the back of the Sentinel.
 - b. Connect one end of the BackPak CD-ROM cable into the Sentinel and the other end into the port marked "Computer" on the back of the BackPak CD-ROM.
 - c. Attach the power cable to the power connector on the BackPak CD-ROM and plug the BackPak power unit into a wall outlet.

WARNING: Use caution when handling boards, such as voice boards or network interface cards, as they are electrostatic-sensitive. Be sure you ground the PC, the work area, and the ground end of the antistatic wrist strap prior to handling a board, and always use antistatic wrist straps and/or electrostatic-dissipative mats while handling a board.

10. Complete the following steps if you need to perform hardware upgrades
- Remove the cover of the PC, if necessary. See the PC manufacturer's documentation for information on removing the PC's cover.
 - If you are installing new voice or fax boards, see Chapter 5, "Preparing the Hardware," in the *Implementation and Service Manual*. If you are not installing new voice or fax boards, proceed with step 10d.
 - If you installed new voice or fax boards, record the settings of the boards such as the hardware interrupt and port address, as applicable. You will need to enter this information when you run the Configure utility.

Voice Board Type	_____
Hardware Interrupt	_____
Shared Memory Addresses	_____
 - If you are adding RAM to the PC, make sure that you modify the PC's BIOS before continuing with the upgrade. For additional information on modifying the BIOS, see the PC manufacturer's documentation.
 - After the hardware upgrades are completed, replace the PC's cover.
11. Turn on the PC. If the messaging system is configured to launch automatically on bootup, it launches. If the messaging system is not configured to launch automatically on bootup, the OS/2 desktop displays.

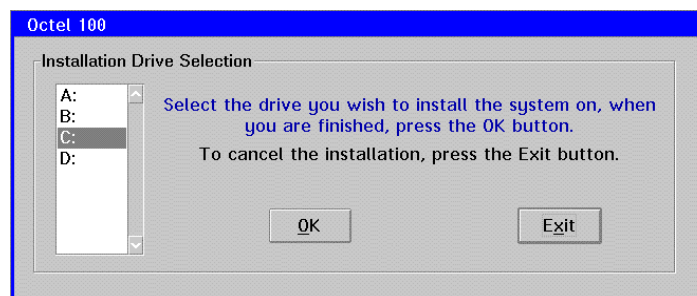
Perform the software upgrade:

- Shut down the Octel system if it is running:
 - Log into the messaging system as a Level 2 or 3 supervisor.
 - To shut down the system, select Exit from the File menu. A dialog box displays a message prompting you to indicate how to shut down the system.
 - Click OK to perform the shutdown. A dialog box displays a message asking if you want to wait for channel activity to cease. Wait for channel activity to cease. Do not click Force. When all the ports are inactive, the system shuts down.
- Run the Sentinel Upgrade Utility, if provided:
 - Insert the Sentinel Upgrade diskette in the A drive.
 - Open an OS/2 window.
 - At the C:\ prompt, type A: and press <ENTER>.
 - At the A:\ prompt, type SUU and press <ENTER>. When the upgrade procedure is finished, the message "Sentinel upgrade successful" displays.
 - Remove the Sentinel upgrade diskette from the diskette drive.
 - Type EXIT and press <ENTER> to close the OS/2 window.

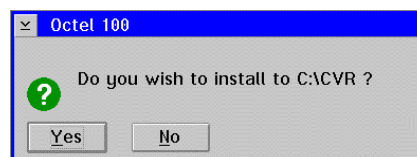
3. Shut down any open applications (for example, UPS, SMDI) and windows except the OS/2 desktop and the LaunchPad (some systems will not include a LaunchPad):
 - a. Press <CTRL+ESC> to open the Window menu.
 - b. Highlight any application you see with the exception of the OS/2 desktop or the LaunchPad.
 - c. Click the right mouse button once on the open application.
 - d. Select Close.
 - e. Repeat steps 3a – d for each open application.
4. Insert the CD-ROM labeled “Messaging Application Version Octel 3.1” into the CD-ROM drive.

Do not attempt installation from the full screen OS/2 window. Because the installation process will run in the background, the installation screens will not be visible to you and you will not be able to follow the prompts.

5. Open an OS/2 window and, from the C: prompt, type E: and press <ENTER> to change to the CD-ROM drive. If you are using a CD drive letter other than E:, specify the appropriate drive letter in the command.
6. From the E: prompt, type CD VM then press <ENTER>. The \VM directory prompt displays.
7. From the \VM directory prompt, type INSTALL and press <ENTER>. The message “Setup is initializing, please wait...” displays.
8. A window displays which briefly describes the installation procedure. To continue installing, click Continue or press <C>. The installation program presents a list of drives from which you can select.



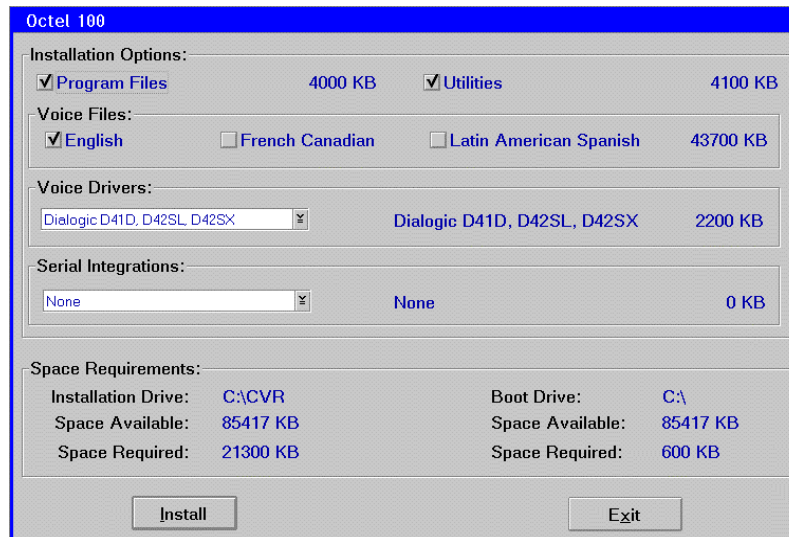
9. Select the drive to which the files should be installed. Use the down arrow key to highlight the appropriate drive, then click OK. (Drives A and B are disk drives.) The system prompts whether you want to install the system to the \CVR directory on the specified installation drive.



10. Click Yes to install the system to the \CVR directory and continue the installation process. If you click No, you are prompted to enter a destination directory.

To facilitate system maintenance, it is recommended that you do not change the default installation directories.

11. You are prompted whether you want to back up the voice mail system. If you select Yes, the system backs up the CVR, CVR1, and REPAIR directories to the \OSP_OLD directory, which contains CVROLD, CVR1OLD, and REPROLD directories, respectively. It is strongly recommended that you back up the voice mail system.
12. Wait while the system prepares to load files. A dialog box with installation options and space requirements displays. The Space Requirements section of the window displays the disk space required, based on the selected options, the space availability, and the installation and boot drives.



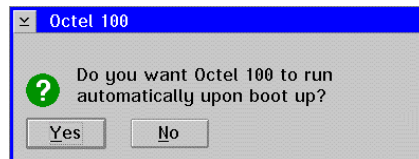
13. Under Installation Options, leave all of the options selected:
 - **Program Files** – Includes the executable files needed to run the messaging system.
 - **Utilities** – Contains the files necessary to run system modules, such as DialPlan and Integrator.
14. Under Voice Files, select the language(s) that you are installing. Note that the Sentinel attached to the PC controls the number of allowed languages allowed.
15. Under Voice Drivers, select the type of voice board installed in the system PC from the drop-down menu.
16. Under Serial Integrations, verify that the option displayed is correct. If it is not, select the appropriate option from the drop-down menu.

You can exit the installation at this point by clicking Exit. After you select Install, you cannot exit the installation process.

17. Click Install to install Octel 100 based on the selections.

A small display appears to the left of the Disk Prompt window to show the progression of the installation process. The graph represents the percent of hard drive space and memory being used, as well as the progression of each file as it is copied from the disk to the hard drive. If the Low icon comes on during installation, do not be concerned.

18. When the system then prompts you to indicate whether you want the messaging system to launch automatically upon bootup, click Yes. This configures Octel 100 to launch each time you restart the PC and allows you to run third-party maintenance utilities from the RUNVM.CMD file. For information on modifying the RUNVM.CMD file, see the topic, "Verifying Files After Installation," in Chapter 6, "Installing the Software," in the *Implementation and Service Manual*.



19. If you selected Yes in 18, you are prompted to indicate whether you want the UPS monitor to load automatically upon boot up. Select Yes if the UPS is currently integrated with the messaging system or you are planning to run UPS integration so the UPS monitors messaging system status to recognize a potential interruption in operation before it occurs. For additional information on the UPS monitor, see Chapter 11, "Integrating with an Uninterruptible Power Supply," in the *Implementation and Service Manual*.

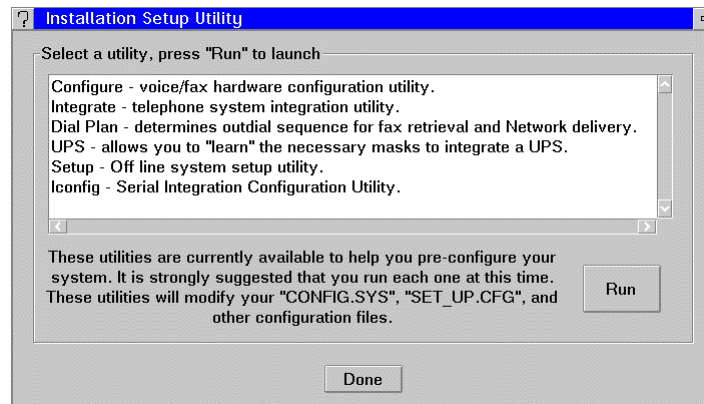
Select No if you do not want the UPS monitor to load upon boot up.

Programs that load prior to the desktop coming up under OS/2, such as UPS, display a default OS/2 icon on the desktop rather than the custom icon.

20. If you installed a serial integration, you are prompted whether you want the serial integration to launch automatically on bootup. Click Yes.
21. A dialog box displays informing you that the file installation is complete. Click OK to continue with system configuration.
22. If you are upgrading from version 1.0x, the Convert window displays and the system converts the existing database for use with the current release of the messaging system. Wait while the database is converted. If a warning displays stating that you must reconfigure inband templates, click Yes to continue. You will address this warning later in this procedure. After the conversion is complete, click Exit. The system creates a file, CONVERT.RPT that logs conversion activity.

All versions are also upgraded for millennium compliance. The system creates a file, UPGRADE.RPT, that logs conversion activity.

23. The Installation Setup Utility dialog box displays a list of utilities you can run to help you configure the Octel 100 system.



WARNING: In step 24, if you migrated an existing messaging system to a new Pentium-level PC, you **must** run Configure. Voice and fax boards are installed but they have not been configured. Failure to run Configure will prevent the messaging system from functioning properly.

24. If you did **not** complete the procedure, "Migrating the Messaging System to a New PC," skip to step 25. If you completed the procedure, "Migrating the Messaging System to a New PC:"
- a. Select Configure from the Installation Setup Utility list, then click Run. See the PC Specification Sheet, provided with the new PC, for information on type and number of voice and fax board installed in the PC. See Chapter 5, "Preparing the Hardware," in the *Implementation and Service Manual* for the default board settings you must enter in Configure and Chapter 7, "Setting Up the System to Recognize Voice and Fax Boards," for information on running Configure.
 - b. When you exit Configure, you are prompted to reboot the PC if you made changes. **Do not reboot at this time.**
 - c. Click OK to close the message box. The Installation Setup Utility displays.
 - d. Select Integrator from the Installation Setup Utility list, then click Run:
 - If you migrated from version 1.0x, you must run the Integrator utility to configure the system to use the correct inband templates for the switch to which the messaging system is connected. For information on running Integrator, see Chapter 8 "Integrating with the Phone System," in the *Implementation and Service Manual*.
 - If you migrated from version 1.5 or higher, verify that the correct switch is listed under Currently Installed Switch field:
 - If the correct switch is installed, click Exit.
 - If the incorrect switch is installed, install the switch to which the messaging system is connected. For information on running Integrator, see Chapter 8 "Integrating with the Phone System," in the *Implementation and Service Manual*.
 - e. Skip to step 26.

25. If you did **not** complete the procedure, "Migrating the Messaging System to a New PC:"
 - a. Select Configure from the Installation Setup Utility list, then click Run:
 - i. Under Installable Hardware, select the board type installed in the PC, then click Configure. The Configure – Dialogic D4xD dialog box displays.
 - ii. Under Voice Board Type, select the type of voice board you recorded in step 3b.
 - iii. In the Hardware Interrupt field, enter the hardware interrupt you recorded in step 3b.
 - iv. Under Shared Memory Addresses, verify that the default address displayed matches the first shared memory address you recorded in step 3b. if there is more than one voice board installed, click Add, scroll to the next setting you recorded in step 3b, and click Done. Repeat for each additional installed voice board.
 - v. Click OK to save any changes. The Configure dialog box displays.
 - vi. To close Configure, click Exit. A dialog box displays prompting you to reboot the system for changes to take effect. **Do not reboot the PC at this time.**
 - vii. Click OK to close the message box. The Installation Setup Utility displays.
26. Select Setup from the Installation Setup Utility list, then click Run. The General Parameters tab displays.
 - a. If no message displayed during conversion in step 22 informing that you must reconfigure inband templates, proceed with step 26b. If you did receive a message during conversion informing you that you must reconfigure inband templates:
 - i. Click the double arrow button in the lower-right corner of the screen to scroll down to the Inband Page 2 tab and click it to select it. The Inband Parameters Page 2 tab displays the inband templates created by the system during conversion. If the phone switch does not support inband templates, no templates are displayed on this tab and you should proceed to step 26b.
 - ii. Follow the procedures under the heading "Creating, Modifying, and Deleting Inband Templates" in Chapter 8, "Integrating with the Phone System," in the *Implementation and Service Manual* to modify the templates to function properly with the phone system.
 - b. Click the double arrow button in the lower-right corner of the screen to scroll down to the Voice System tab and click it to select it. The Voice System Parameters tab displays.
 - c. View the value for the RECDTMF and PLAYDTMF parameters. If the values are not set to at least 5, change each to 5 by highlighting the value, typing 5 and pressing <ENTER>.
 - d. To save the settings, select Save from the File menu.
 - e. To close System Setup, select Exit from the File menu. After a few moments, the Installation Setup Utility list displays.
27. Click Done to exit the Installation Setup Utility dialog box. The system then completes the installation. When installation is complete, the system displays a message reminding you to restart the computer for any changes to take effect. **Do not restart at this time.**



28. To close the dialog box and return to the OS/2 window, click OK.
29. To verify that the upgrade was successfully performed, you must review the upgrade reports:
 - a. From the E:\VM prompt, type `C :` and press `<ENTER>`. The C: prompt displays.
 - b. From the C: prompt, type `E C:\CVR1\upgrade.rpt` then press `<ENTER>`. An OS/2 editor window displays the contents of the upgrade report. Scroll through the report to determine if any errors were logged during the upgrade. If not, proceed with step 29c. If errors were logged during the upgrade, contact a technical support representative before proceeding.
 - c. If you upgraded from version 1.5 or higher, skip to step 29d. If you upgraded from version 1.0x, select Open from the File menu. When the Open dialog box displays, select CONVERT.RPT from the File listbox, then click Open. The contents of the CONVERT.RPT file display. Scroll through the report to determine if any errors were logged during the upgrade. If not, proceed with step 29d. If errors were logged during the upgrade, contact a technical support representative before proceeding.
 - d. Double-click the icon in the upper-left corner of the window to exit the editor.
30. If the system is using a Serial integration, restore the COMn.CFG file you backed up in step 2 under, "Prepare the PC for the software upgrade," earlier in this note. For example, to restore a COM1.CFG file that was backed up to disk:
 - a. Insert the disk with the backed-up files in the A: drive.
 - b. From the C: prompt, type `COPY A:\COM1.CFG C:\CVR\COM4.CFG` and press `<ENTER>`. The COM1.CFG file is copied from the disk to the \CVR directory and renamed to COM4.CFG to work on COM Port 4.
31. If the system was running version 1.0x, skip to step 32. If the system was running version 1.5.x or 2.02.x, copy the contents of the \CVR1 directory to the \BACKUP1 directory:
 - a. From the C: prompt, type `XCOPY C:\CVR1\*.* C:\BACKUP1` and press `<ENTER>`. The contents of the \CVR1 directory are copied to the \BACKUP1 directory. Record the number of files copied.
 - b. To verify that the files were copied, from the C: prompt, type `DIR C:\BACKUP1` and press `<ENTER>`. Verify that the number of files in the \BACKUP1 directory match the number of files that were copied in step 31a.
32. To exit the OS/2 window, type `EXIT` then press `<ENTER>`.
33. Remove the CD-ROM.
34. Shut down the PC:
 - a. Select Shutdown from the LaunchPad. When you are prompted whether you want to close all windows and active programs, click OK.
 - b. When prompted to shut down or reboot, turn off power to the PC.

- c. If you did **not** complete the procedure, "Migrating the Messaging System to a New PC," skip to step 35. If you did complete the procedure, "Migrating the Messaging System to a New PC, you must connect the new PC:"
 - d. Remove the voice and fax lines from the current messaging system PC and connect them to the new messaging system PC.
 - e. If the current messaging system was connected to a UPS, plug the new messaging system into the UPS. If you are using UPS integration, you must also connect the serial communications cable.
 - f. If the current messaging system was connected to a printer, connect the printer to the back of the Sentinel on the new messaging system's parallel port.
 - g. If the current messaging system is using a Serial integration, see the Configuration Note for the switch to verify that the new messaging system PC is properly configured for the integration (such as disconnecting the current messaging system from the serial integration device and connecting the new messaging system to the device).
 - h. If you removed a token ring card from the current messaging system, you must now install the token ring card in the new messaging system PC:
 - i. Remove the cover from the new messaging system PC.
 - ii. Select a 16-bit expansion slot for installing the network card. Unscrew the cover on the slot (located at the rear of the PC chassis, top center) and remove it.
 - iii. Apply equal pressure to both ends of the board and push down firmly to seat the board in the slot. The board should slide down easily most of the way. If you feel any resistance, check the alignment of the board. Make sure the board is properly seated in the slot.
 - iv. Fasten the board's metal bracket with the retaining screw. Make sure the connection on the back of the board is accessible from the rear of the PC chassis before securing the screw.
 - v. Replace the PC's cover.
 - vi. Secure the network connection cable or jack into the network card.
35. Turn on power to the PC. If the messaging system is configured to launch automatically on startup, it launches. Otherwise, the OS/2 desktop displays.

WARNING: In step 36, you must launch Call Analysis, even if you determine that you are not required to actually run the utility. This is required because, when you launch Call Analysis, the TONE.PAR file is adjusted for this release of the software.

36. Complete the following steps to launch Call Analysis:
- a. Shut down the messaging system if it is running:
 - i. Log into the messaging system as a Level 2 or 3 supervisor.
 - ii. To shut down the system, select Exit from the File menu. A dialog box displays a message prompting you to indicate how to shut down the system.
 - iii. Click OK to perform the shutdown. A dialog box displays a message asking if you want to wait for channel activity to cease. Wait for channel activity to cease. Do not click Force. When all the ports are inactive, the system shuts down.

- b. Double-click the Octel icon to open the program folder.
- c. Double-click the Call Analysis icon in the program folder. The Call Analysis for OS/2 dialog box displays.
- d. Click Continue to load required tone templates. The Call Analysis dialog box displays.
- e. You may need to run the Call Analysis utility. For guidelines for running the Call Analysis utility, see Chapter 9, "Defining Phone System Signals," in the *Implementation and Service Manual*. If you determine that you are not required to run the Call Analysis utility, click Exit to close the utility. If you determine that you need to run the Call Analysis utility, see Chapter 9, "Defining Phone System Signals," in the *Implementation and Service Manual*.
- f. If the messaging system is not already running, start it by double-clicking the program icon in the program folder.

If the voice system does not start up as it should, contact a technical support representative immediately.

- 37. It is essential that you test any inband templates currently defined for the switch to ensure the templates function as they should. To test the inband templates:
 - a. Log into the messaging system as a Level 2 or 3 supervisor.
 - b. Select System Setup from the Options menu on the main window. The General Parameters tab displays.
 - c. Use the right arrow button in the lower-right corner of the screen to scroll down to the Inband Page 2 tab and click it to select it. The Inband Parameters Page 2 tab displays the inband templates currently defined for the system.
 - d. Test each template by calling into system, performing the function associated with the template, and verifying that the call is processed correctly. For additional information on making any necessary modifications to the inband templates, see Chapter 8, "Integrating with the Phone System," in the *Implementation and Service Manual*.
 - e. After you have tested each inband template and made necessary modifications, save the templates by selecting Save from the File menu.
 - f. To exit System Setup, select Exit from the File menu.
 - g. If you made any modifications to the inband templates as a result of the testing you performed, select Restart Voice System from the Options menu to restart the messaging system. If it was not necessary for you to make modifications, you do not need to restart the system.
- 38. If you were not using custom phrase files in the [LANGUAGE]1.O32, [LANGUAGE]2.O32, or [LANGUAGE]3.O32 files, skip to step 39. If you were using custom phrase files, you must use V-Edit to restore the phrases individually from the back \CVR directory. For information on using V-Edit to restore phrases, see the heading "Adding Segments to Phrases" in Chapter 15, "Recording and Editing Prompts," in the *Implementation and Service Manual*.

Make sure you restore the phrases to the correct phrase number.

39. It is important that you test the integration with the switch and the messaging system software features to ensure the entire system works as it should. A test plan you can use to help you exercise system features and options and confirm they are functioning appropriately is provided in Chapter 24, "Testing and Troubleshooting the System."
40. If you completed the procedure, "Migrating the Messaging System to a New PC," you must install the Graham Utilities software on the new messaging system PC. See the topic, "Installing and Configuring Graham Utilities," in Chapter 6, "Installing the Software," in the *Implementation and Service Manual*.
41. If you upgraded from version 1.0x, you must modify the RUNVM.CMD file to replace references to GammaTech with references to Graham Utilities:
 - a. Open an OS/2 window.
 - b. From the C: prompt, type `CD CVR` and press <ENTER>. The \CVR directory prompt displays.
 - c. To open the RUNVM.CMD file, from the \CVR directory prompt, type `E RUNVM.CMD` and press <ENTER>. The contents of the RUNVM.CMD file are displayed.
 - d. Locate any lines that contain references to the GammaTech disk optimization program, for example:

```
HPSFOPT C: -03 -D -L OPTRPT.RPT -U
```

and replace each complete line with the following, which references Graham Utilities:

```
CALL C:\GU20\GU.CMD
```
 - e. Select Save from the File menu. If this is the first time you have saved the file, the Save Notification dialog box displays.
 - f. Click Type. The Type dialog displays.
 - g. Click Plain Text, then click Set. The file is saved.
 - h. Double-click the icon in the upper-left corner of the window to close the editor.
 - i. To close the OS/2 window, type `EXIT` and press <ENTER>.
42. If the messaging system was running Visual Mailbox, the Voice Fax Server is automatically upgraded when you upgrade the voice mail system. However, you must upgrade the Visual Mailbox Client. See the topic, "Installing the Client Software on the LAN Server," in Chapter 19, "Installing and Configuring Visual Mailbox," in the *Implementation and Service Manual*.
43. If you completed the procedure, "Migrating the Messaging System to a New PC," and the current messaging system was running Visual Mailbox, you **must** install the NetWare Requester (if implementing on a Novell network) or the IBM Peer for OS/2 (if using a Windows NT or Local Files implementation) on the new messaging system. See Chapter 19, "Installing and Configuring Visual Mailbox," in the *Implementation and Service Manual* for information on installing the necessary software.

Post Upgrade Considerations

Please be aware that Call Analysis has been improved with this release to use custom tone information for transfers instead of the Dialogic defaults. Due to these enhancements, some systems may experience problems with call progress after the upgrade. If this occurs, re-run call analysis so that the system can obtain the required tone information.

Upgrading from Compass Enhanced Office 2.1.6 to Octel 100 Version 3.1

Compass Enhanced Office (CEO) systems currently running Version 2.1.6 are supported for upgrade directly to Version 3.1.

If you are not sure whether the CEO version currently installed is 2.1.6, shut down the CEO system if it is currently running, then complete the following steps:

1. Open an OS/2 window.
2. From the \CVR directory prompt, type `DIR CEO.EXE` then press <ENTER>. If the date of the CEO.EXE file is 11/05/96, the CEO system is running version 2.1.6. If the date is prior to 11/05/96, the CEO system is not running version 2.1.6.

Upgrade Considerations

Be aware of the following important considerations before beginning the upgrade:

- A BackPak external CD-ROM is used for upgrades on PCs that don't have an installed CD-ROM drive. Instructions for connecting and using the BackPak are provided in the upgrade procedure.
- When you perform the upgrade from CEO 2.1.6 to Version 3.1, the existing CEO database is converted for use with 3.1. Existing system information, such as network nodes, V-Trees, subscriber information, classes of service, etc. is retained. Due to functionality differences, however, when the conversion to Version 3.1 is performed, personal and system distribution lists are not converted and must be re-created. During the conversion, the DISTLIST.RPT file is created in the \CVR1 directory. This file identifies the destinations assigned to each system distribution list and to each mailbox's personal distribution lists.
- There are a number of functional differences between CEO and the Version 3.1 system. You should consider these differences before performing the upgrade:
 - Telephone User Interface (TUI): there are differences between the CEO and the Version 3.1 subscriber interface. Some of these differences, such as sending and receiving messages and using message confirmation and distribution lists, are significant. It is strongly recommended that existing CEO subscribers be familiarized with the user interface. The *Quick Reference Guide* provides a high-level overview of user interface procedures for Octel 100.
 - Subscriber directories function differently. For information on including the directory option in the Attendant Menu, see Chapter 13, "Setting Up System Prompts," in the *Implementation and Service Manual*. For information on the Dial by Name feature, which enables subscribers to call another subscriber whose extension they do not know, see Chapter 16, "Managing System Mailboxes," in the *Implementation and Service Manual*. For information on Caller Parameters, which enable outside callers to call a system subscriber whose extension they do not know, see Chapter 13, "Setting Up the System," in the *Implementation and Service Manual*.
 - The subscriber Directory prompt is not used. The Name prompt is used for Dial by Name instead.
 - There are call handling differences. See Chapter 24, "Testing and Troubleshooting the System," in the *Implementation and Service Manual* for information on call handling.

Performing the Upgrade from CEO 2.1.6 to Octel 100

Complete the following steps to successfully install the upgrade:

Prepare the system for the software upgrade:

If you completed the procedure, "Migrating the Messaging System to a New PC," skip to the procedure, "Perform the Software Upgrade."

1. Shut down the Octel system if it is running:
 - a. Log into the messaging system as a Level 2 or 3 supervisor.
 - b. To shut down the system, select Exit from the File menu. A dialog box displays a message prompting you to indicate how to shut down the system.
 - c. Click OK to perform the shutdown. A dialog box displays a message asking if you want to wait for channel activity to cease. Wait for channel activity to cease. Do not click Force. When all the ports are inactive, the system shuts down.
2. Run Quick Assist in Update (Partial) mode. See the procedure, "Running Quick Assist," under the section, "Migrating the Messaging System to a New PC," earlier in this note for information on running Quick Assist.
3. Verify that there is sufficient space on the hard drive for the upgrade:
 - a. Open an OS/2 window.
 - b. From the C: prompt, type DIR and press <ENTER>. At the end of the file listing, the bytes free is listed.
 - c. Verify that there is at least 100,000,000 bytes free (100MB). If there is not at least 100,000,000 bytes free, contact a technical support representative before continuing.
 - d. Type EXIT and press <ENTER> to close the OS/2 window.
4. If you do **not** need to perform any hardware upgrades or use the BackPak CD-ROM for the upgrade, skip to the procedure, "Perform the Software Upgrade."
5. If you are using a BackPak external CD-ROM to upgrade, complete the following steps to copy the files necessary to run the BackPak to the PC:
 - a. Insert the disk labeled BackPak CD-ROM Disk in the PC's disk drive.
 - b. Open an OS/2 window and, from the C: prompt, type A: and press <ENTER>. The A: prompt displays.
 - c. From the A: prompt, type BPADD and press <ENTER>. The necessary files are copied to the PC. When the files are copied, a message displays warning you **not** to run the BPADD command again. It is very important that you run this command only **once**. Otherwise, the PC will not operate properly.
 - d. Remove the disk from the disk drive.
 - e. Type EXIT and press <ENTER> to close the OS/2 window.
6. Shut down the PC:
 - a. Select Shutdown from the LaunchPad. When you are prompted whether you want to close all windows and active programs, click OK.
 - b. When prompted, turn off power to the PC.

7. If you are using the BackPak CD-ROM for the upgrade:
 - a. If a printer is currently attached to the messaging system Sentinel, disconnect the printer cable from the back of the Sentinel.
 - b. Connect one end of the BackPak CD-ROM cable into the Sentinel and the other end into the port marked "Computer" on the back of the BackPak CD-ROM.
 - c. Attach the power cable to the power connector on the BackPak CD-ROM and plug the BackPak power unit into a wall outlet.

WARNING: Use caution when handling boards, such as voice boards or network interface cards, as they are electrostatic-sensitive. Be sure you ground the PC, the work area, and the ground end of the antistatic wrist strap prior to handling a board, and always use antistatic wrist straps and/or electrostatic-dissipative mats while handling a board.

8. Complete the following steps if you need to perform hardware upgrades:
 - a. Remove the cover of the PC, if necessary.
 - b. If you are installing new voice or fax boards, see Chapter 5, "Preparing the Hardware," in the *Implementation and Service Manual*. If you are not installing new voice or fax boards, proceed with step 8d.
 - c. If you installed new voice or fax boards, record the settings of the boards. You will need to enter this information when you run the Configure utility.

Voice Board Type _____

Hardware Interrupt _____

Shared Memory Addresses _____

- d. If you are adding RAM to the PC, make sure that you modify the PC's BIOS before continuing with the upgrade. For additional information on modifying the BIOS, see the PC manufacturer's documentation.
 - e. After the hardware upgrades are completed, replace the PC's cover.
9. Turn on the PC. If the messaging system is configured to launch automatically on bootup, it launches. If the messaging system is not configured to launch automatically on bootup, the OS/2 desktop displays.

WARNING: You must upgrade the Sentinel for use with the Octel 100. Otherwise, you will receive a warning during Octel 100 installation and the CEO to Version 3.1 conversion will not run automatically. You will then have to run it manually from the Installation Utility during step 25 of the software upgrade.

Perform the software upgrade:

1. Shut down the Octel system if it is running:
 - a. Log into the messaging system as a Level 2 or 3 supervisor.
 - b. To shut down the system, select Exit from the File menu. A dialog box displays a message prompting you to indicate how to shut down the system.
 - c. Click OK to perform the shutdown. A dialog box displays a message asking if you want to wait for channel activity to cease. Wait for channel activity to cease. Do not click Force. When all the ports are inactive, the system shuts down.

2. If you received a new Sentinel, remove the currently installed Sentinel from the PC's parallel port, then install the new Sentinel, which you received with the upgrade software, to the PC's parallel port.

or

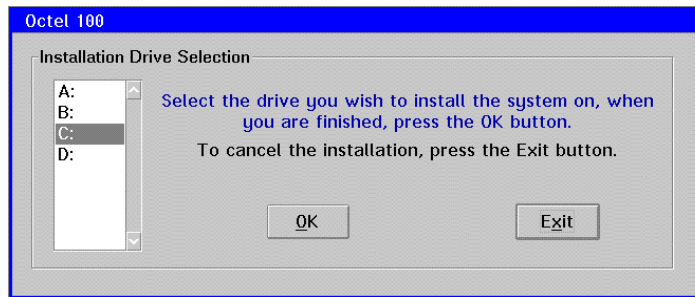
If you received a Sentinel upgrade diskette, complete the following steps to perform the Sentinel upgrade:

- a. Shut down the CEO system, if it is running.
 - b. Insert the Sentinel upgrade disk in the A drive.
 - c. Open an OS/2 window.
 - d. At the C:\ prompt, type A: and press <ENTER>.
 - e. At the A:\ prompt, type SUU and press <ENTER>.
 - f. When the upgrade procedure is finished, the message "Sentinel upgrade successful" displays.
 - g. Type EXIT and press <ENTER> to close the OS/2 window.
3. Shut down any open applications (for example, UPS, SMDI) and windows except the OS/2 desktop and the LaunchPad:
 - a. Press <CTRL+ESC> to open the Window menu.
 - b. Highlight any application you see with the exception of the OS/2 desktop or the LaunchPad.
 - c. Click the right mouse button once on the highlighted application.
 - d. Select Close.
 - e. Repeat steps 3a – d for each open application.
 4. Insert the CD-ROM labeled "Messaging Application Version Octel 3.1" in the CD-ROM drive.

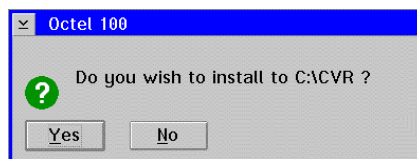
Do not attempt installation from the full screen OS/2 window. Because the installation process will run in the background, the installation screens will not be visible to you and you will not be able to follow the onscreen prompts.

5. Open an OS/2 window, and from the C: prompt, type E: and press <ENTER> to change to the CD-ROM drive. If you are using a CD drive letter other than E:, specify the appropriate drive letter in the command.
6. From the E: prompt, type CD VM and press <ENTER>. The \VM directory prompt displays.
7. From the \VM directory prompt, type INSTALL and press <ENTER>. The message "Setup is initializing, please wait" displays.

8. A window displays, which briefly describes the installation procedure. To continue installing, click Continue or press <C>. The installation program presents a list of drives from which you can select.



9. Select the drive to which the files should be installed. Use the down arrow key to highlight the appropriate drive, then click OK. (Drives A and B are disk drives.) The system prompts whether you want to install the system to the \CVR directory on the specified installation drive.



10. Click Yes to install the messaging system to the \CVR directory and continue the installation process. If you click No, you are prompted to select a destination directory.

To facilitate system maintenance, it is recommended that you do not change the default installation directories.

11. A dialog box displays with two buttons, Yes and No:
- Click Yes to proceed with the installation of Octel 100 Version 3.1 over CEO and conversion of the database.
 - Click No if you do not want to perform the upgrade at this time. If you click No, a dialog box displays informing you that the install is not complete; click OK to close the dialog box. The installation is then aborted and the upgrade is **NOT** performed. To perform the upgrade at another time, start from the beginning of the procedure, "Performing the Upgrade from CEO 2.1.6 to Octel 100."

12. The system automatically backs up the \CVR and \CVR1 directories into \OLDCVR and \OLDCVR1, respectively. Please wait while the system prepares to load files. A dialog box with installation options and space requirements displays. The Space Requirements section of the window displays the disk space required, based on the selected options, the space availability, and the installation and boot drives.

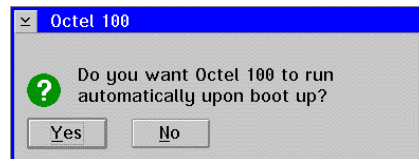
13. Under Installation Options, leave all of the following options selected:
- **Program Files** – Includes the executable files needed to run the messaging system.
 - **Utilities** – Contains the files necessary to run system modules, such as Dial Plan and Integrator.
14. Under Voice Files, select the language(s) that you are installing. Note that the Sentinel attached to the PC controls the number of allowed languages.
15. Under Voice Drivers, verify that the option displayed is correct. If it is not, select the appropriate option from the drop-down menu.
16. Under Serial Integrations, verify that the option displayed is correct. If it is not, select the appropriate option from the drop-down menu.

You can exit the installation at this point by clicking Exit. After you select Install, do not exit the installation process.

17. Click Install to install Octel 100 based on the selections.

A small display appears to the left of the Disk Prompt window to show the progression of the installation process. The graph represents the percent of hard drive space and memory being used, as well as the progression of each file as it is copied from the disk to the hard drive. If the Low icon comes on during installation, do not be concerned.

18. When the system then prompts you to indicate whether you want the messaging system to launch automatically upon bootup, click Yes. This configures Octel 100 to launch each time you restart the PC and allows you to run third-party maintenance utilities from the RUNVM.CMD file. For information on modifying the RUNVM.CMD file, see the topic, "Verifying Files After Installation," in Chapter 6, "Installing the Software," in the *Implementation and Service Manual*.



19. If you selected Yes in step 18, you are prompted to indicate whether you want the UPS monitor to load automatically upon bootup. Select Yes if you are planning to run UPS integration so the UPS monitors system status to recognize a potential interruption in operation before it occurs. For additional information on the UPS monitor, see Chapter 11, "Integrating with an Uninterruptible Power Supply," in the *Implementation and Service Manual*.

Select No if you do not want the UPS monitor to load upon bootup.

Programs that load prior to the desktop coming up under OS/2, such as UPS, display a default OS/2 icon on the desktop rather than the custom icon.

20. If you installed a serial integration, you are prompted whether you want the serial integration to launch automatically on bootup. Click Yes.
21. A dialog box displays when the installation is complete. Click OK to continue with system configuration.
22. After all of the files have been copied, wait while the system loads the configuration, modifies paths, creates the desktop folder, and creates program objects. The Convert dialog box displays and the system performs the conversion. After the conversion is successfully completed, click Exit to continue.
23. The Installation Setup Utility dialog box displays a list of utilities you can run to help you configure the Octel 100 system.

WARNING: In step 24, if you migrated an existing messaging system to a new PC, you **must** run Configure. Voice and fax boards are installed but they have not been configured. Failure to run Configure will prevent the messaging system from functioning properly.

24. If you did **not** add new voice or fax boards to the PC and you did **not** complete the procedure, "Migrating the Messaging System to a new PC, skip to step 25. If you added new voice or fax boards to the PC or you completed the procedure, "Migrating the Messaging System to a New PC," select Configure from the Installation Setup Utility list, then click Run:
- Enter the information for the new voice and fax boards in Configure. See Chapter 5, "Preparing the Hardware," in the *Implementation and Service Manual* for the default board settings you must enter in Configure and Chapter 7, "Setting Up the System to Recognize Voice and Fax Boards," for information on running Configure. If you migrated to a new PC, see the PC Specification Sheet, provided with the new PC, for information on type and number of voice and fax board installed in the PC.
 - When you exit Configure, you are prompted to reboot the PC if you made change. **Do not reboot at this time.**
 - Click OK to close the message box. The Installation Setup Utility displays.
 - If you completed the procedure, "Migrating the Messaging System to a New PC," select Integrator from the Installation Setup Utility list, then click Run. Install the switch to which the messaging system is connected. For information on running

Integrator, see Chapter 8 “Integrating with the Phone System,” in the *Implementation and Service Manual*.

You do not need to run System Setup at this time, although you should familiarize yourself with the differences on the General and Networking tabs. See Chapter 13, “Setting Up the System,” in the *Implementation and Service Manual* for additional information on the General and Networking tab settings.

25. If you did not receive an error message during Octel 100 installation indicating that the Sentinel was not installed, proceed with step 26. If you did receive an error message during Octel 100 installation because you did not replace or upgrade the Sentinel before starting the Octel 100 installation, make sure the new Sentinel is attached, then select the conversion from the list and click the Run button. The conversion screen displays. When the conversion is complete, click Exit to close the conversion utility and return to the Installation Setup Utility dialog box.
26. Click Done to exit the Installation Setup Utility dialog box. The system displays a message when installation is complete and reminds you to restart the computer for any changes to take effect. **Do not restart at this time.**
27. To close the dialog box and return to the OS/2 window, click OK.
28. To verify that the upgrade was successfully performed, you must review the upgrade report:
 - a. From the E:\VM prompt, type `C:` and press <ENTER>. The C: prompt displays.
 - b. From the C: prompt, type `E C:\CVR1\ceo2opc.rpt` then press <ENTER>. An OS/2 editor window displays the contents of the upgrade report.
 - c. Scroll through the report to determine if any errors were logged during the upgrade. If not, double-click the icon in the upper-left corner of the window to close the editor, and proceed with the next step. If errors were logged during the upgrade, contact a technical support representative before proceeding.
29. If the CEO system had system or personal distribution lists, a report was created during the conversion containing all of the lists and their entries. This report will help you re-create the system and personal distribution lists, which are not converted. To view the report, from the C: prompt, type `E C:\CVR1\distlist.rpt` then press <ENTER>. An OS/2 editor window displays the contents of the report. You can print the report, if a printer is attached to the PC, or save it to a file for printing on another PC.
30. Type `EXIT` then press <ENTER> to close the OS/2 window.
31. Remove the CD-ROM.
32. Shut down the PC:
 - a. Select Shutdown from the LaunchPad. When you are prompted whether you want to close all windows and active programs, click OK.
 - b. When prompted to shut down or reboot, turn off power to the PC.
33. If you did not complete the procedure, “Migrating the Messaging System to a New PC,” skip to step 34. If you did complete the procedure, “Migrating the Messaging System to a New PC, you must connect the new PC:”
 - a. Remove the voice and fax lines from the current messaging system PC and connect them to the new messaging system PC.
 - b. If the current messaging system was connected to a UPS, plug the new messaging system into the UPS. If you are using UPS integration, you must also connect the serial communications cable.

- c. If the current messaging system was connected to a printer, connect the printer to the back of the Sentinel on the new messaging system's parallel port.
- d. If the current messaging system is using a Serial integration, see the Configuration Note for the switch to verify that the new messaging system PC is properly configured for the integration (such as disconnecting the current messaging system from the serial integration device and connecting the new messaging system to the device).
- e. If you removed a token ring card from the current messaging system, you must now install the token ring card in the new messaging system PC:
 - i. Remove the cover from the new messaging system PC.
 - ii. Select a 16-bit expansion slot for installing the network card. Unscrew the cover on the slot (located at the rear of the PC chassis, top center) and remove it.
 - iii. Apply equal pressure to both ends of the board and push down firmly to seat the board in the slot. The board should slide down easily most of the way. If you feel any resistance, check the alignment of the board. Make sure the board is properly seated in the slot.
 - iv. Fasten the board's metal bracket with the retaining screw. Make sure the connection on the back of the board is accessible from the rear of the PC chassis before securing the screw.
 - v. Replace the PC's cover.
 - vi. Secure the network connection cable or jack into the network card.
34. Turn on power to the PC. If the messaging system is configured to launch automatically on bootup, it launches. Otherwise, the OS/2 desktop displays.
35. If you completed the procedure, "Migrating the Messaging System to a New PC," you must install the Graham Utilities software on the new messaging system PC. See the topic, "Installing and Configuring Graham Utilities," in Chapter 6, "Installing the Software," in the *Implementation and Service Manual*.
36. If the CEO system was running Visual Mailbox, the Voice Fax Server is automatically upgraded when you upgrade the voice mail system. However, you must upgrade the Visual Mailbox Client. See the topic, "Installing the Client Software on the LAN Server," in Chapter 19, "Installing and Configuring Visual Mailbox," in the *Implementation and Service Manual*.
37. If you completed the procedure, "Migrating the Messaging System to a New PC," and the current messaging system was running Visual Mailbox, you **must** install the NetWare Requester (if implementing on a Novell network) or the IBM Peer for OS/2 (if using a Windows NT or Local Files implementation) on the new messaging system. See Chapter 19, "Installing and Configuring Visual Mailbox," in the *Implementation and Service Manual* for information on installing the necessary software.

Post Upgrade Considerations

Please be aware of the following important post upgrade consideration:

- Call Analysis has been improved with this release to use custom tone information for transfers instead of the Dialogic defaults. Due to these enhancements, some systems may experience problems with call progress after the upgrade. If this occurs, re-run call analysis so that the system can obtain the required tone information.

Issues Addressed in Octel 100 Version 3.1

The following program changes have been made in Octel 100 Version 3.1:

- Corrected an issue where disabling the Dial By Name feature in a mailbox's class of service caused the system to not voice the message address options after the subscriber records a message from that mailbox.
- Corrected an issue that could cause a voice mail port to lock. The port lockup occurred when the OPC system received a reply to a network message sent with message confirmation to a non-OPC system.
- Corrected an issue where certain network errors caused the Voice Fax Server to stop functioning properly. The Voice Fax Server now reconnects or restarts, depending on the network error encountered.
- Corrected an issue where, when a Visual Mailbox client attempts to send a message to a distribution list, it could cause the Voice Fax Server to stop functioning properly.
- Corrected an issue that could cause a network I/O error when creating a linear group of network nodes.
- Quick Assist now recognizes distribution list prompts. Previously, if a distribution list prompt was encountered, an unknown message type error would be written to qassist.rpt.
- Corrected an issue where, when creating a guest mailbox, the sponsor mailbox's name prompt was automatically assigned to the guest mailbox being created.
- Corrected an issue where V-Trees could become cross-linked.
- In a V-Tree, when the Record and Return action is used, callers are now correctly returned to the last menu with more than one option.
- Corrected an issue where Quick Assist was restoring deleted mailboxes in cases where a subscrib.bak file existed and stranded messages were found for the deleted mailboxes.
- If a user attempts to start the messaging system when it is already running, a message box displays to inform the user that the system is already running, the system window is maximized, and the system is made the active window.
- An issue was corrected that could cause Message Indicators to become out of sync on systems using SMDI integration where the Light Message Indicator for Every Message parameter was disabled in System Setup.
- Corrected a problem where business hour setting changes were not always properly saved.
- When a V-Tree has the option Record to Mailbox as the only option, and a caller hangs up during recording, the system now disconnects, instead of continually sending silent messages to the "record to" mailbox, which caused a voice mail port to be tied up by the V-Tree.
- Corrected an issue where Supervisors were able to press <*> while recording a prompt from the Supervisor's menu and then accept the blank prompt. In this case, the default prompt was voiced to callers instead. The system now prompts the user to record instead.
- Multilingual after-hours automated attendant now allows dial through to an extension.
- Corrected an issue where, in some cases, a port was tied up when an autoprint event was scheduled.
- If a Supervisor clears messages from a mailbox, the Visual Mailbox client is now updated if it is open. This prevents the user from attempting to review a deleted message, which caused an error message to be displayed.

- Corrected inconsistencies in return codes for network messaging and inconsistent or lack of voicing of node prompts for AMIS and OctelNet.
- Users are now notified that a system restart is required if the RECDTMF or PLAYDTMF parameter settings are changed.
- When a recording failure occurs on a V-Tree Record and Advance option that is the second or greater Record and Advance option in a sequence, the message is now only sent once.
- Quick Assist now checks and verifies the distribution list count and corrects it if necessary. Also, if a personal distribution list is found to be corrupt, the distribution list is deleted from the mailbox and the Quick Assist report identifies the problem.
- OctelNet message confirmation now works correctly when multiple nodes are assigned to the same destination telephone number.
- OctelNet message confirmations are now properly voiced when the node number/mb number is entered from the Message Locator prompt.
- Corrected an issue where, in some cases, when forwarding a message to a Personal Distribution List, attached comments returned after they were erased and the database was corrupted.
- When an OctelNet message is returned because the destination mailbox is deleted or cannot accept messages (for example, it is full), the system now voices the correct return reason.
- Users are now notified that changing language positions in system requires shutdown, not restart.
- The network destination is now correctly voiced back to subscribers defining a Follow-Me-Forward address for verification.
- The correct time of day (AM or PM) is now voiced when an unsuccessful login attempt has occurred.
- Corrected an issue where blank messages were being saved to the messaging system's hard drive when non-subscribers hung up before recording began. Note that this only occurred in scenarios where the callers did not have to address the messages, such as when a caller dials a busy extension, selects the option to leave a message, and then hangs up before recording begins.
- Problems with printing a graphical view of V-Trees in Visual Architect have been corrected.
- The phrase "Please hold while your call is being transferred" is no longer voiced twice during intercom paging.
- The tutorial now allows subscribers to record greetings in supported languages other than just the default language.
- Language selection is no longer voiced to subscribers who press <#> at the main greeting on a multilingual system.
- An issue was addressed where subscribers entering a DBN/NameNet entry that cannot receive messages were returned to the main menu.
- If a subscriber sends a message to an OctelNet node at the same time the messaging system is transmitting to that node, it is now handled properly. Previously, this could have caused the message counter for that node to become out of sync and, in even rarer cases, depending on the exact timing, mailboxes to become cross-linked.
- NameNet entries are now properly accessed for searches.

- Corrected an issue with Quick Assist so it now recommends Rebuild All mode when a file I/O error is encountered.
- Corrected an issue where a Supervisor could create an AMIS node with the same telephone access number as an OctelNet node.
- Corrected an issue where an error was logged when a subscriber attempted to change a sent message while the mailbox subscriber was logging into the mailbox, as well as a related issue that caused a line error.
- Corrected an issue where, when sending a message to a single destination active for follow-me-forward, after the subscriber pressed <*> to indicate there were no more destinations, the system would voice that the destination was canceled and the message erased, even though the message was sent.
- Corrected an issue where, when sending to multiple destinations, including a mailbox active for follow-me-forward, when the subscriber entered the number of the mailbox active for follow-me-forward, then pressed <#> to send the message, the system voiced, *"Are you still there,"* and hung up. While the message was sent to the other entered destinations, it was not forwarded to the follow-me-forward destination, but was placed in the local mailbox's new message queue.
- Fax document numbers are now voiced correctly when listening to a V-Tree.
- The system no longer slows down during a mailbox search.
- Changed the default setting for the following System Setup parameters:

Parameter	New Default
Daily Maintenance Hours	2 (2 AM)
Shutdown System After Daily Maintenance	Yes
Minimum Message Length in Seconds	2
Network Prefix	9,
International Access Code	011
Country Code	1
Long Distance Access Code	1
Dispatch Options-Permit Outbound	Yes
Maximum Delay for Queued Dispatch in Minutes	15
Maximum Number of Queued Messages	3
Paging Wait Time	90
Custom Transfer Code	&,XDR
Transfer Release Code when Busy	&,
Transfer Release Code when No Answer	&,
Call Screening Release Code when Busy	&,
Call Screening Release Code when No Answer	&,
Call Screening Release Code when Reject	&,
Call Screening Release Code when Transfer	&,
Use DialPlan database	No
Permit Message Indicators	Yes
Seconds to Wait for DID (DIDTIME)	1
Off Hook Delay Time (OFFHDLY)	25
Dial Tone Detection Time (DTONDET)	0
Maximum Silence Before Hanging Up	2000
Maximum time before logging off a passive client	0
Common Setup Parameters - Protocol - Use SPX	No

- Problems was corrected that could cause an access violation during system shutdown.

- Corrected an issue where SMDI was not correctly parsing the internal forward packet that allows the subscriber to reply.
- Silence compression in SOLVE has been disabled.
- When using the V-Edit dialer function, the system now pauses before beginning to dial. This helps prevent the system from dialing before dial tone begins.
- Changes have been made to the CONFIG.SYS file settings for optimized use with the messaging system.
- The \REPAIR directory is no longer deleted when the system is started from the STARTUP.CMD file, and the -D parameter has been added to the Quick Assist command line in the STARTUP.CMD file so that unattached messages are automatically deleted when Quick Assist is run.
- Error logging process has been enhanced so that Dialogic voice level device errors are now logged properly.
- The messaging system now saves its window position when it is closed so that when it is restarted, the window displays in the same position.
- Removed the DiskWarn utility in response to a lockup issue.
- Corrected an issue where, in some cases, when a fax retrieval event could not be successfully completed, the fax port on which the attempt was made became tied up.
- For SL-1 systems, the set is now made busy when a port is disabled or terminated.
- Corrected an issue where intercom redirect was forwarding callers to the operator instead of the entered extension if the subscriber hung up before the system finished voicing the options.
- Updated the Toshiba DK24 configuration note to include call analysis instructions.
- Corrected an issue where, when sending a distribution list message and one of the destinations was a mailbox that was full, the remaining destinations in the list did not receive the message.
- Corrected an issue that, in rare cases, caused a network queues out of sync message.
- Users attempting to send a message to a mailbox that is full are now prompted to enter another mailbox to send the message to, instead of being returned to the Main menu where they must rerecord the message.
- Added DTMF Call Progress support for Comdial. Refer to the Comdial Configuration Note.
- Corrected an issue that caused problems with auto-forwarding when one of the mailboxes was enabled for follow-me-forward.
- An issue has been addressed that caused the original message to be left on the hard drive when a user forwarded a message with comments to multiple mailboxes at the same network node.
- Corrected an issue where, when using SOLVE to record system prompts, the prompt number was not always removed from the screen when you deleted the prompt.
- Corrected an issue where, when using SOLVE to record or rerecord the System Prompt on the Network Node Maintenance dialog box, the prompt number was not always saved when using the Next and Previous buttons to move between nodes.
- Corrected an issue where, when using the Clear option from the Mailbox menu to clear a mailbox's messages, fax files (.TIF) were not always deleted from the hard drive.

- Corrected an issue where Greeting by Port settings were not taking effect until either the system was shut down and restarted or daily maintenance occurred.
- Corrected an issue where, if a caller dialed a mailbox that is forwarded using call handling, the mailbox to which the call is forwarded was busy or not answered, and the caller selected the option to leave a message, the system did not voice the personal greeting or default prompt before playing the beep to start recording.
- Corrected an issue where, when using Greeting by Port and copying one day's settings to the next day, the Selected Hours were not being copied, if used.
- Support for SPX mode has been removed from Visual Mailbox.
- An issue with the Channel Status window scroll bar has been corrected.
- The Hardware Interrupt field in the Configure utility now correctly defaults to 5.
- If default tone tables exist for the switch installed using Integrator during system installation, Call Analysis no longer automatically comes up the first time the PC is rebooted after installation.
- Corrected an issue where, when sending OctelNet messages from Visual Mailbox, the messages were always sent out with the highest dispatch option allowed in the mailbox's Class of Service, even if another dispatch option was selected.