



Strata Call Manager Administrator Guide

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Contents

Introduction

Organization.....	iii
Conventions.....	iii
Related Documents/Media.....	iv

Chapter 1 – Overview

Requirements.....	2
PC Requirements.....	2
LAN Requirements.....	2
Power-Up.....	2
Support Plan (Maintenance).....	3

Chapter 2 – Installation

Installing Strata Call Manager.....	5
Setup User Profiles.....	7
Voice over IP Audio.....	9

Chapter 3 – Deploying Strata Call Manager

Server-based Automatic Upgrades.....	12
How it Works.....	12
Setting Up Strata Call Manager for Automatic Upgrades.....	13
Advanced Information.....	14

Chapter 4 – Server-based Dial Plan

Dial Plan Setup.....	15
Calling Within My Home Area Code.....	17
Calling Outside the Home Area Code.....	18
Test a Phone Number.....	18

Chapter 5 – Server-based SCM COS

Verification of Settings.....	28
Managing files on the Server.....	28
Duplicating Configuration Files to Other PCs.....	29
Dial Plan Configuration File.....	29
Strata Call Manager Configuration Files.....	29
Button Configurations.....	30
Directory Files.....	30
User Defined Actions.....	30
Personal Call Handling Rules.....	31
Advanced Configuration.....	31
Post Call Survey.....	31

Using Extra Information in Personal Call Handler Rules..... 32
Editing .INI Files 33
 Editing the AG_COS.INI File (COS) 33
 Editing the Agnt_Ph.INI File (Strata Call Manager Main)..... 34
Editing the NP_Rec.INI File (Recording)..... 38
Editing the ONP_ACD.INI File (ACD) 40
Editing Chat_COS.INI File (Chat) 40

Chapter 6 – Open Architecture Interfaces

Registry Entries 41
Companion Applications Suite 42
 Configuration 42
Open Architecture Links 42
 DDE Command Interface..... 42
 Call Control Commands..... 42
 Phone Control Commands 44
 ACD Commands 45
 Other Commands 46
Command File Interface..... 47
OLE / COM Interface..... 47
 Call Control Commands..... 47
 Phone Control Commands 49
 ACD Agent Commands 49
 Other Commands 50

Appendix A –Trouble Shooting

Installation Problems..... 53
TAPI Service Provider Problems..... 53
Configuration Problems..... 55
Third Party Out Dialing/Screen Pop Problems..... 56
Miscellaneous Problems 57

Introduction

This user guide describes how to use the Toshiba Strata Call Manager (SCM) software with Strata CIX670, CIX200, CIX100, CIX100-S, and CIX40 telephone systems:

Organization

- **Chapter 1 – Overview** provides an overview of the Strata Call Manager buttons and screens.
- **Chapter 2 – Installation** covers the customizable settings.
- **Chapter 3 – Deploying Strata Call Manager** includes setting up actions for personal call handling and programmable keys.
- **Chapter 4 – Server-based Dial Plan** shows how to use Strata CIXsystem features from SCM.
- **Chapter 5 – Server-based SCM COS** describes the user information when connecting to a Plantronics USB Wireless headset.
- **Chapter 6 – Open Architecture Interfaces** explains the interactions between Strata Call Manager and Outlook.
- **Trouble Shooting** explains the details of personal call handler feature of Strata Call Manager.

Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	<i>Calls attention to important instructions or information.</i>
Extension Number	Press to answer a call to the Extension Number. Each station can have multiple extension buttons. Incoming calls ring the extension button(s) from the top down. For example, station 10's extensions ring 10-1 first, then 10-2, 10-3, and 10-4. A station is considered busy when all extensions are being used. Note The naming convention for DKT assignments within Toshiba is Directory Numbers. For clarity and ease of understanding, the terms Extension Number and Phantom Extension Number will be used in this document in lieu of PDN and PhDN.
Arial Bold	Represents telephone buttons.

Conventions	Description
+	Shows a multiple PC keyboard or telephone button entry. Entries without spaces between them show a simultaneous entry. Example: Delete+Enter . Entries with spaces between them show a sequential entry. Example: # + 5.
Tilde (~)	Means “through.” Example: 350~640 Hz frequency range.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

Related Documents/Media

Note: Some documents listed here may appear in different versions on the CD-ROM or in print. To find the most current version, check the version/date in the Publication Information on the back of the document’s title page.

Refer to the following for more information:

- Strata Call Manager User Guide
- Strata Call Manager On-line Help

This document is the System Administrator's Guide for the Strata Call Manager (SCM). This book contains information for a system administrator to install and administer one or more installations of SCM. The 'System Administrator' is assumed to be a person familiar with the phone system, computers, and LANs. This document is NOT a 'User Guide' for the Strata Call Manager user. The on-line manual and help file in Strata Call Manager should be used in conjunction with the Administrator's Guide to provide a complete operation of Strata Call Manager.

The Strata Call Manager is a PC Phone software program that is used on PCs. It is a "Client" program of the Toshiba Net Server. At each PC there is no physical connection between the phone and the PC, because Strata Call Manager uses a 'virtual' connection to control the phone (see [Figure 2](#)).

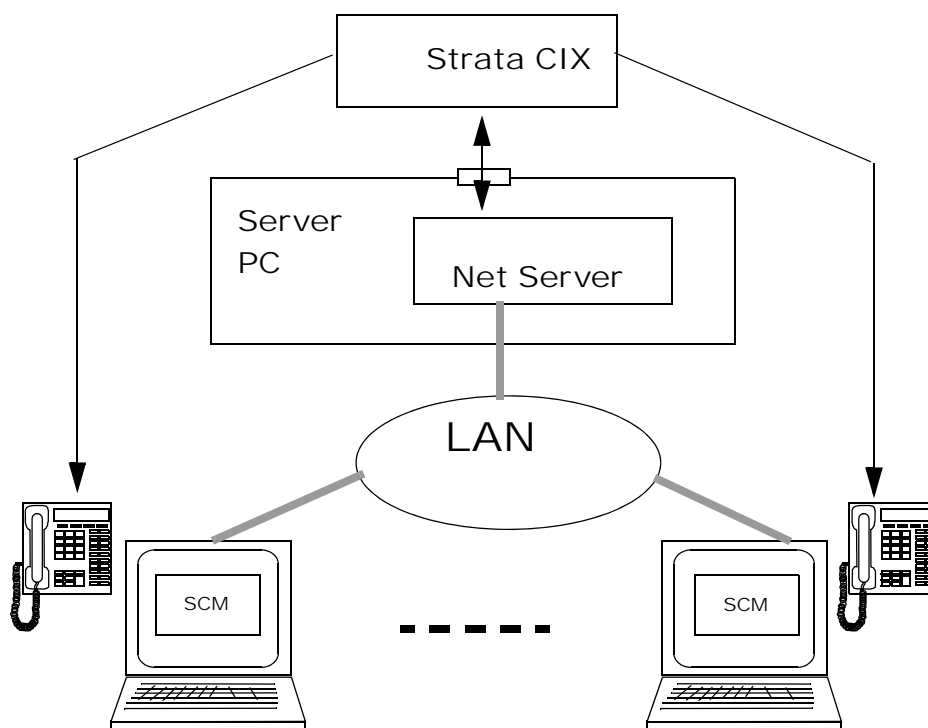


Figure 2 Installation

Two levels of software licensing is provided and controlled by the Net Server (using a software copy key) at the Server PC. No copy key or software licensing is required at the PC. Strata Call Manager can be installed on any

number of PCs, and when each PC runs its copy of Strata Call Manager, the Net Server validates whether it has sufficient licenses to run that additional copy of Strata Call Manager. If not, that PC will be restricted to running Strata Call Manager in Demo mode (which will run most features but will time out after a while).

Strata Call Manager licenses have two levels, one that controls the features for working in conjunction with a desktop phone enhancing the way that phone works while all speech is provided by the desktop phone. The second level provides a complete speech path for Voice over the Internet (VoIP) to provide a complete phone without using a desktop phone. This second interface can also work using a desktop phone or standalone by virtue of changing the "profile" settings.

This document provides a quick reference for a System Administrator to get Strata Call Manager installed and running. Once it is installed and operational, the On-Line Help file for Strata Call Manager provides extensive detail on using various features.

Requirements

PC Requirements

Strata Call Manager only

The Strata Call Manager software can be loaded on a standard PC running Windows® XP Professional with Service Pack 3, Windows Server 2003 with Service Pack 2, Windows Server 2008 with Service Pack 2, Windows Vista with Service Pack 2, or Windows 7 software. SCM requires .NET framework 3.5 SP1 (bootstrapper included in installer). The specific requirements of this PC can vary; follow the recommended configuration for each operation.

Strata Call Manager with Soft Phone Audio

The PC requirements for running the VoIP Soft Phone software requires at least Windows XP Professional or higher to operate. Follow Microsoft's recommendations or higher for memory needs. The VoIP is not supported on the older Microsoft Operating Systems except for Strata Call Manager operation only without audio. Physical devices to be used for headsets or handsets require a USB port.

LAN Requirements

The Strata Call Manager communicates with the Net Server using a Microsoft network over TCP/IP, thus this type of network must be installed and running. If your site already runs a different network protocol, such as Novell IPS, you'll need to run a dual stack configuration.

Power-Up

The PC running the Strata Call Manager software should typically be configured to automatically initiate the program whenever the PC is restarted or reset.

Support Plan (Maintenance)

Strata Call Manager requires a license that is controlled in the Net Server to operate normally or it will run in a demo mode for a limited time period. This license contains the start date and support date. Toshiba offers free upgrades and technical assistance for all sites that maintain their system by extending their support date. The software will continue to run after the support date expires, but upgrades to add the latest features cannot work until the license is brought back into the support plan.

When you launch Strata Call Manager you will see the Toshiba Splash Screen. By default the splash screen will not show support plan information. If you have ShowMaintOnSplash enabled in your COS file, the splash screen will display your Support Contract information. This is recommended as a reminder to the administrator of the date your plan expires. If your maintenance expires, you should contact Toshiba TSD Customer Service. The splash screen will look similar to the one below:



This page is intentionally left blank.

Two different Setup files are offered for installing Strata Call Manager. The one titled Toshiba_Strata Call Manager_xxx_Setup.exe provides a complete installation for any individual PC. The second is titled Toshiba_Strata Call Manager_Server_xxx.exe and offers both an ability to install on an individual PC or install on the Net Server PC for automatic updates.

Installing the software on a number of different PCs can be made easier by either installing the Server-based version on the Net Server and opening a 'file share' to get a copy on each PC to create the initial installation. Even if not using the automatic upgrade capability, posting the individual setup file on a common PC to be accessed for installing on client PCs can save much time.

The following procedures are for using the individual Strata Call Manager Setup file. When using the Server Setup file, one additional step is needed to choose to install using the Client Installation instead of using the Server Upgrade Installation.

Installing Strata Call Manager

- First, make sure that Net Server is installed and is operating on a Server PC on the network. Note the following information:
 - "Network Name" of this server PC. This "Network Name" would be: 1) The NET BIOS name if the target PC is on the same LAN segment; 2) Or the complete domain name if reaching across a router or over a WAN.

- Run the Toshiba_Strata Call Manager_xxx_Setup.exe program to install Strata Call Manager on the target PC. This opens the Installation Wizard (shown below), which will direct you through the following steps.



Figure 3 Strata Strata Call Manager Installation Wizard

1. The initial screen will advise you to shut down all Windows programs to ensure that all modules can be installed. Click Next.
2. Read the License Agreement and click the I Agree button if you agree with the licensing provision and want to continue with the installation process.
3. It is recommended that the default destination directory be used as the installation directory. If desired, you can browse to a different location for installing the software. Click Next.
4. The installation process offers a wizard for the integration settings for a number of popular applications to be used with Strata Call Manager. Make a selection from the list. If your application is not listed select "None" and contact Technical Support for an application note, if one exists, that note will provide instructions for making your application work. Click Next.
5. Select the options to be included with Strata Call Manager. These options will appear on the companion application tabs. A check in Tracer Features enables Step 6 for setting the Record Button options. Click Next.
6. If the Option Button Tracer Features were selected, then the Select Record Options offers the ability to Show Record Button, to manually Stop and Start the Tracer recording, and the ability to enter Bookmarks on the active call. Click Next.

7. This step pauses to ensure you have made that all the parameters settings needed prior to proceeding with the actual installation and making final settings. Click Next.
8. If this is a first time installation of SCM, you will be asked to set up a user profile & server settings.
9. Finally, once all files and settings are completed, this screen will inform you of the completion. It is recommended that Strata Call Manager be added to the Startup Group. Click Finish. Typically, you will be asked to restart your PC for all the settings to take place.

Setup User Profiles

When Strata Call Manager is started, the first item that will need to be defined is at least one User Profile.

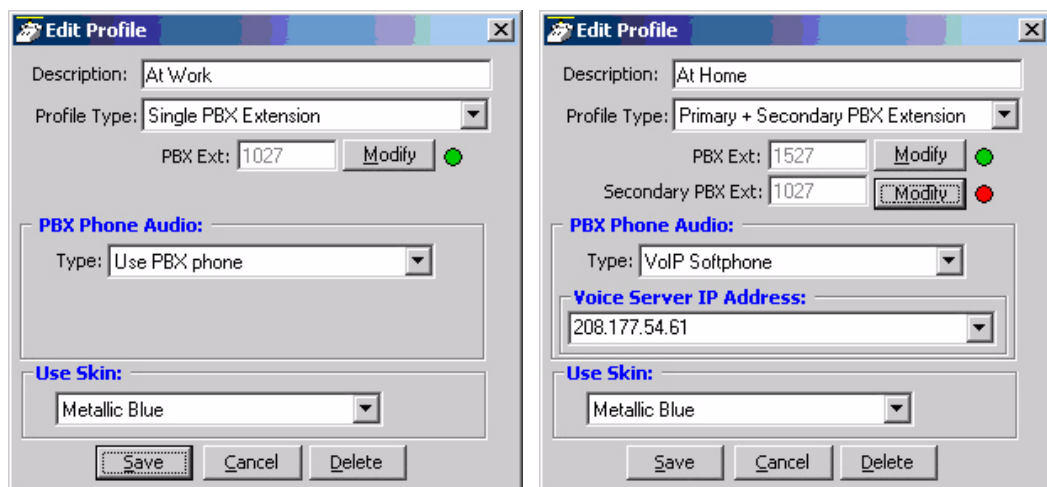
To define a User Profile

1. Go to the Main Menu > File > Change Login. The Strata Call Manager Login Profile dialog box displays.
2. Select from existing profiles and click Use to set this profile into an active state.

or click Add New to create a new profile or Modify to change the selected profile.



The definitions and offerings of both the Edit Profile and Add Profile dialog provide the same set of choices as shown in the Edit Profile screens shown below:

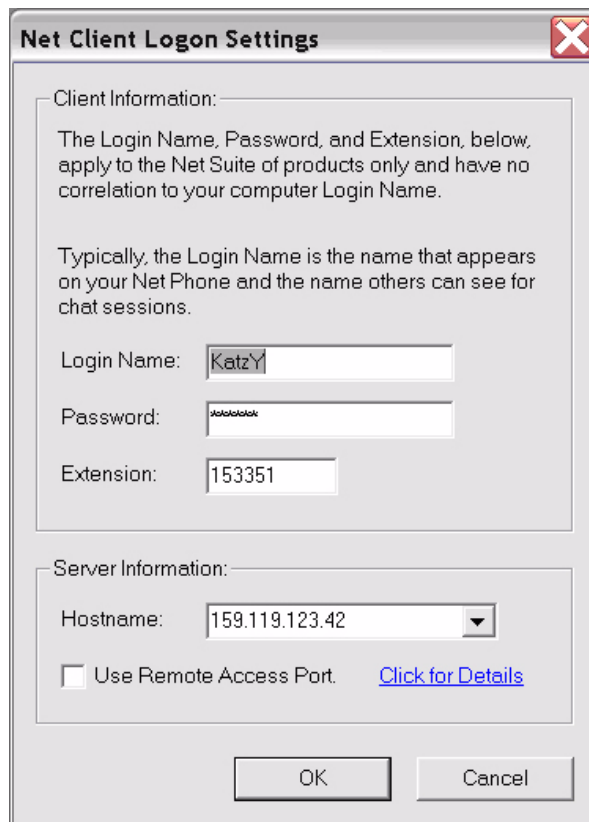


Note: If using SCM with Strata Unifier you must enter the Node ID + Extension Number and without Unifier just extension number.

- Description – Enter a name (or modify the name) to call the profile.

- Profile Type – Use the pull down list and choose a type.
 - Single PBX Extension – Defines a single PBX DN that will be monitored for calls.
 - Primary and Secondary PBX Extension – Defines a primary and a secondary PBX DN that will be monitored for calls. This allows having a primary extension number, usually a VoIP station, plus still be able to get calls from your desktop phone.
- PBX Ext – Click the Modify button to open the Net Client Logon Settings dialog.
 - Client Information – Enter the User name, Password (optional), and extension number for the primary extension.
 - Server Information – Enter the Net Server PC's network name or IP address.

Note: If using SCM with Unifier you must enter the Node ID + Extension Number, and w/o Unifier just extension number.



The image shows a dialog box titled "Net Client Logon Settings" with a close button (X) in the top right corner. The dialog is divided into two sections: "Client Information" and "Server Information".

Client Information:
The Login Name, Password, and Extension, below, apply to the Net Suite of products only and have no correlation to your computer Login Name.
Typically, the Login Name is the name that appears on your Net Phone and the name others can see for chat sessions.

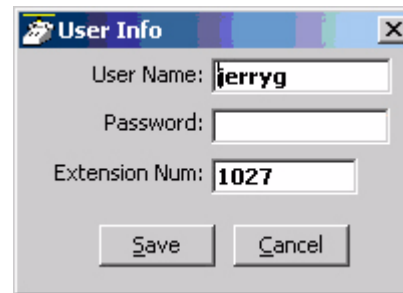
Fields:
Login Name: KatzY
Password: [masked]
Extension: 153351

Server Information:
Hostname: 159.119.123.42
 Use Remote Access Port. [Click for Details](#)

Buttons: OK, Cancel

- **Secondary PBX Ext** – Click the Modify button to open the User Info dialog.

- User Info – Enter the User Name, Password (optional), and Extension Number for the secondary DN to monitor. Click Save when done.

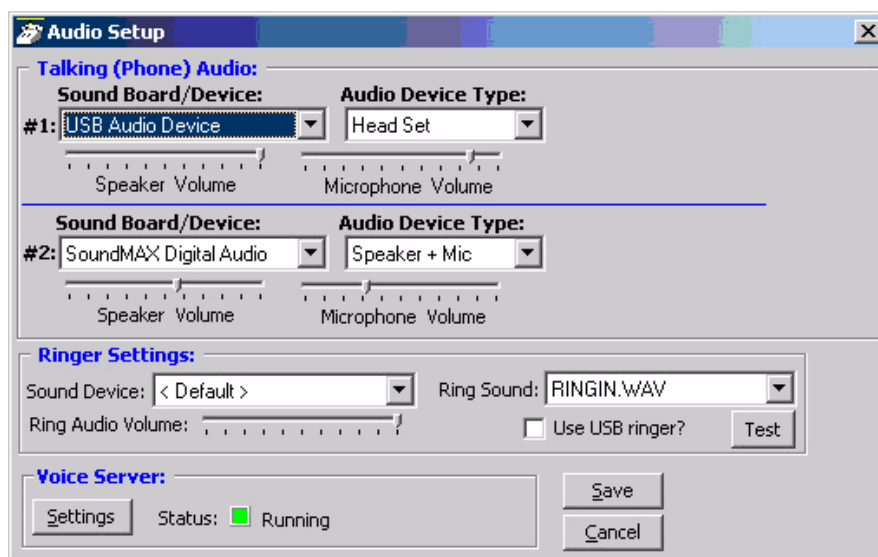


- PBX Phone Audio – Use the pull down menu and choose whether the primary connection is using the PBX Phone or VoIP Audio for the speech path.

- Voice Server IP Address – When VoIP is selected, enter an IP address for the voice server providing the PBX extension.

Voice over IP Audio

When Voice over IP is used for the Audio connection, some additional choices are necessary for determining how the audio path will be connected to the PC. When VoIP is the primary DN, an additional button appears on the main screen of Strata Call Manager. This button defaults showing Headset and when pressed shows SPKR. Right click on this button and the Audio Setup dialog will appear. This screen defines how the audio is handled and the device type used for primary (#1) connection (Headset button position) and for the secondary (#2) connection (SPKR button position). Each of these positions has speaker and microphone volume adjustments.



- Talking (Phone) Audio – Choose the Sound Board/Device to be used and the Audio Device Type from the pull down menus for both #1 and #2 devices.
- Ringer Settings – Choose the Sound Device to be used for the ringing indications. Choose the WAV file for the ringing sound.
- Voice Server – This provides access to the Modify Profile screen to make changes if needed and also provides the status of the connection with the Strata CIX system.

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When installing a system involving a number of SCM users, using server-based configurations and/or copying of configuration files onto other PCs can improve the on-going administration. This section describes three server-based configuration items plus instructions for duplicating configuration data from one Strata Call Manager onto other SCM users. Typically, a combination of these items is used for deploying multiple SCM users in your organization.

- **Server-based Automatic Updates** – Upgrades to Strata Call Manager can be published on the server. Each time a Strata Call Manager client attempts to make a connection to the server, its version is checked, when an update is available, this update may be offered or forced to the user causing the client PC to be updated.
- **Server-based Dial Plan** – A Dial Plan for making calls and how to treat Caller ID information is required for many Strata Call Manager features. This can be a complex issue for many users, thus having a server-based common definition administered and tested by one person makes the settings for all other people. This makes it much easier for each user.
- **Server-based Strata Call Manager COS** – The Server controlled COS requires the Strata Call Manager configuration files to be stored on and used from the central server. This allows the system administrator to setup a configuration, save it to the server, and then have a group of SCM users use that configuration from the server. Thus by making a single configuration change, the system administrator can cause that change take affect on all users (in the group).
- **Copying Configuration Files to Other PCs** – As an alternative to creating a centralized COS or Dial Plan, it may be useful to create a configuration on one PC and copy these configuration files from this PC to others being setup. This operation saves time and may be practical for smaller installations.

Strata CIX

Deploying Strata Call Manager

Server-based Automatic Upgrades

Strata Call Manager supports an automatic upgrade feature to ease the burden of installing new releases on dozens of workstations, and setup files are released for each new version of Strata Call Manager:

Toshiba_Strata Call Manager_xxx_Setup.exe = Complete Setup file for Strata Call Manager clients.

Toshiba_Strata Call Manager_Server_xxx.exe = Configures Net Server for automatic Strata Call Manager updates.

Where **xxx** is the specific version of the file.

All files are available on the Toshiba FYI site.

How it Works

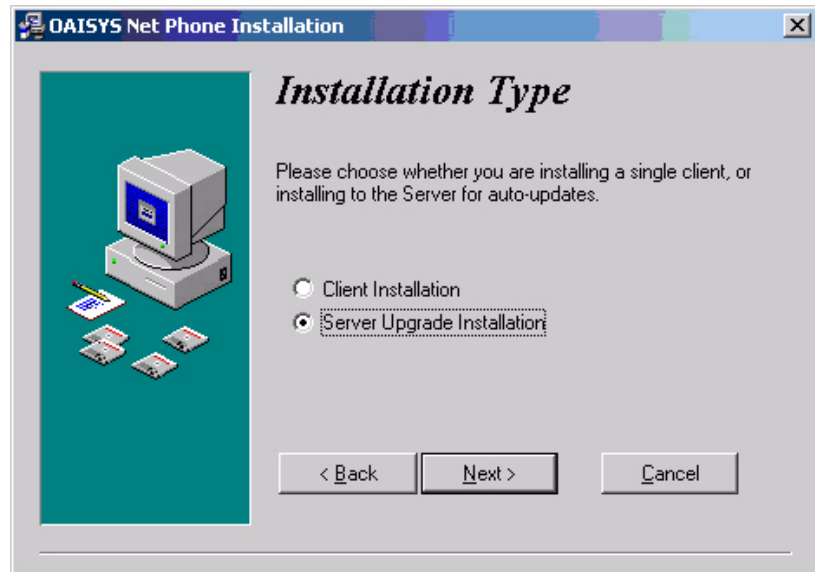
Strata Call Manager connects to Net Server at startup. During the login phase, Net Server checks the version of Strata Call Manager and compares it to the upgrade information in an ".INI" file. If the client is current, Net Server allows the connection. If the client is out of date, Net Server compares the client version to a list of versions and sends a copy of **Toshiba_Strata Call Manager_xxx_Setup.exe** to the client.

The client receives the appropriate upgrade file via the Toshiba Transfer Protocol. This protocol operates on the normal Toshiba TCP port (8767). Clients connecting to Net Server through a firewall will receive upgrades normally through the standard 8767 port, i.e., if Strata Call Manager can connect to Net Server, it is eligible to receive Automatic Upgrades.

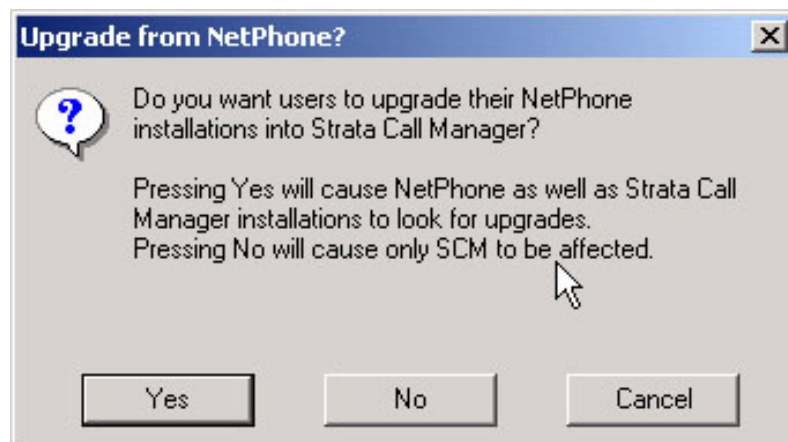
Strata Call Manager displays either an "Upgrade in progress" dialog box (Forced Upgrade), or notifies the user that an upgrade is available and offers the option to upgrade now (Optional Upgrade). If the user chooses to upgrade, Setup displays a warning if it detects other TOSHIBA applications (Chat, DSS) active on the PC and asks the user to exit those applications. If the user does not exit before continuing, Setup may attempt to restart the PC after completing the upgrade. Setup does this to ensure all TOSHIBA applications are using the current files.

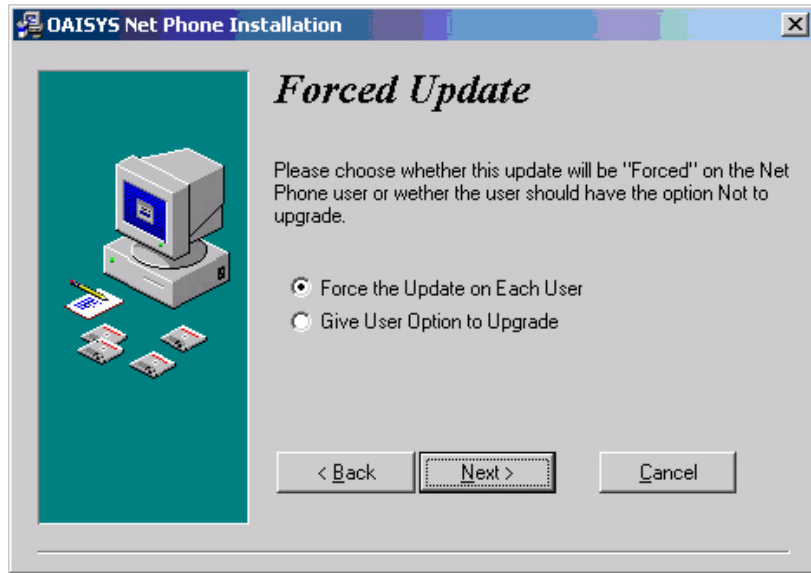
Setting Up Strata Call Manager for Automatic Upgrades

The System Administrator must install the upgrade files on the Net Server. Launch **Toshiba_Strata Call Manager_Server_xxx.exe** on the Net Server PC.



1. Choose the Installation Type. Select **Server Upgrade Installation**, then click Next.
 - **Client Installation** runs the normal Strata Call Manager Setup to install a copy for use on the local PC.
 - **Server Upgrade Installation** installs the appropriate files on the server PC.
2. The Upgrade from NetPhone screen displays. Click Yes to upgrade Net Phone installations to SCM.





Select whether to **Force the Update on Each User** or **Give User Option to Upgrade**. For most LAN installations, forcing the users to upgrade is the best choice. If you support users who connect via IP devices over relatively slow WAN links, you should give your users the option to decline the upgrade. Users on slow links can choose to upgrade during periods of low activity, or after hours.

Advanced Information

Setup creates a folder called "Strata Call Manager\Install" in the Net Server folder. Setup places copies of **StrataCallManager_Toshiba.exe**, and **InstallVersion.ini** in the Install folder.

The **InstallVersion.ini** file is part of each release of **Strata Call Manager_xxx_Server.exe**. Do not modify the contents of **InstallVersion.ini** unless specifically directed by Technical Support Engineer. The contents of a sample file is defined in the table below:

[Version]	Settings Definitions
NewVersion="V4.0.202"	New Version = Text string indicating the now current version of Strata Call Manager.
Date="01/03/2002"	Date = Text string indicating the ship date of the now current Strata Call Manager.
FullFile="Strata Call Manager_Toshiba.EXE"	FullFile = Text string containing the filename of the full Strata Call Manager Setup file.
PatchFile="NP_Update.exe"	PatchFile = Text string containing the filename of the incremental patch file.
ForcedUpdate=N	ForcedUpdate = Y or N – indicates whether user has the option to decline the upgrade.
FromVersion="V4.0.32; V4.0.33; V4.0.34; V4.0.35; V4.0.36; V4.0.37; V4.0.38; V4.0.39; V4.0.200; V4.0.201"	FromVersion = Text string containing a list of versions from which a PatchFile upgrade is valid. If the current client version appears in the FromVersion list, Net Server sends the PatchFile to the client. If the current version does not appear in the list, Net Server sends the FullFile to the client.

Each Strata Call Manager can be configured to follow a local Dial Plan or a Server-based Dial Plan. This is controlled in Strata Call Manager's Preferences dialog box under the Dialing Tab. How a person accesses outside lines and the numbers to be dialed can be fairly complex and is best administered using a central set of rules and a person familiar with the Strata CIX and local dialing rules. Thus we recommend that a central Dial Plan be established, which will update all users whenever changes are made in the system or outside dialing patterns.

Dial Plan Setup

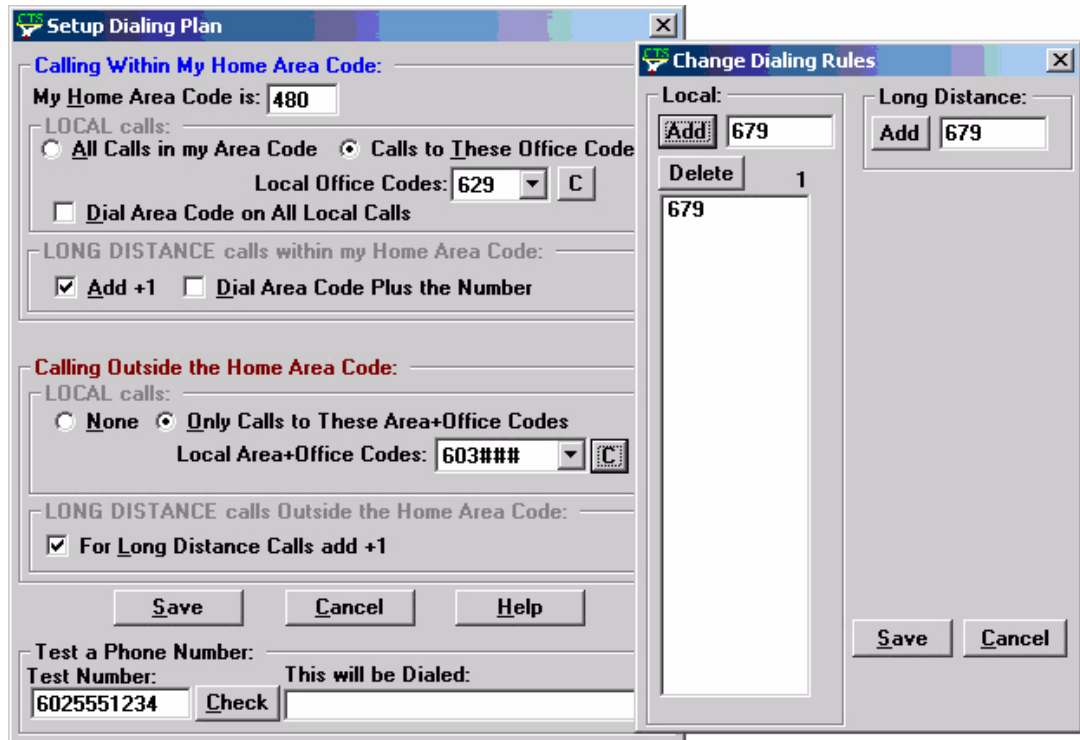
Each area of the US uses a different set of rules for determining which calls are local or long distance calls. The opening pages of your phone book are a good source for how to dial different numbers in your area. Your System Administrator will also need to define access codes for reaching outside lines. These pages generally define how to dial different areas and provide a listing of prefix codes for the local calling areas. Three typical examples are:

1. **Phoenix, AZ** – all calls within the "602", "480", and "623" area codes are considered to be local calls, while all calls outside those area codes are considered long distance.
2. **Santa Fe, NM** – calls to some office codes within the "505" area code are considered to be local calls, while other calls to the "505" area code are considered long distance.
3. **Atlanta, GA** – all calls to area codes "770" are considered to be local calls while some calls to the "404" and "678" area codes are also considered to be local calls.

Therefore, you should create a dialing plan to correctly handle the dialing of numbers.

To Setup a Dial Plan on the Server

1. Go into the Net Server, under Processes, Show the Dial Plan Service (right-click and choose Show Service).
2. In the Dial Plan Service dialog box, click the Setup Dial Plan button to show the following screens:



Calling Within My Home Area Code

- **Home Area Code** – Set this to the Area code where the phone is located. This will be used by Strata Call Manager to determine which dialed calls are within your home area code and when searching a contact manager (reverse screen-pop) the dialed number will need the area code included, i.e. Microsoft Outlook.
- **Local Calls?** – Select either All Calls in my Area Code or only Calls to these Office Codes.
- **Local Office Codes** – When you choose Call to these Office Codes, the pull down listing shows the exchange codes (prefix codes) that are considered to be a local call from your location. To add, delete or change any codes, click the **C button** to display the "Change Dial Rules" screen.
 - **To Add Local Prefix Codes** – Enter the prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 75# would represent all codes 750 to 759 and 7## would represent codes 700 to 799.
 - **To Delete Local Prefix Codes** – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card.
 - **To Delete a Specific Prefix Code** – To delete on prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add. For example, if prefix code 755 is long distance but all other 75# codes are local, first enter 75# into the local list and the add 755 as Long Distance – the resultant local list will be 750, 751, 752, 753, 754, 756, 757, 758 and 759.
- **Dial Area Code on Local Calls** – Enable this feature in areas, such as Atlanta, where you must always dial the full 10-digit phone number (include the area code) even when the call is local. Most areas of the US, local calls do not include the area code and dial only 7 digit numbers for local calls. Any number dialed from another program or hot key dialing will be down to its base 7 digits by removing the Home Area Code before it is dialed.
- **Add+1** – Check the box if you need to dial a leading 1 before the number for calls within your Home Area Code.
- **Dial Area Code Plus the Number** – Check the box when the home area code is also to be dialed.

Calling Outside the Home Area Code

- **Local calls?** – Select either None or Only Calls to These Area+Office Codes.
- **Local Area+Office Codes** – This entry is only presented when you chose Only Call to These Area+Office Codes in the previous step. The pull down listing shows the codes (area code plus prefix codes) that are considered to be a local call from your location. Click the C button to add, delete, or change codes by displaying the "Change Dial Rules" screen.
 - **To Add Local Area+Prefix Codes** – Enter the six digit area+prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 602### would represent all prefix codes in area code 602.
 - **To Delete Local Area+Prefix Codes** – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card.
 - **To Delete a Specific Area+Prefix Code** – To delete one prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add.
- **For Long Distance Calls add +1** – Check the box when you need to have a leading one ("1") added when making long distance calls outside your home area code.
- Click **Save** when done.

Test a Phone Number

Test a Phone Number – Dialing plans can become complex. Use these boxes to enter different telephone numbers and check to see the number that will be dialed. The dialed number should be identical to what you need to dial when using your phone to manually dial.

The creation of a Server-based Class of Service for Strata Call Manager begins in Net Server using the Net Server Administrator program, followed by creating your configuration on the Admin Strata Call Manager, then publishing the configuration files to the Net Server PC. The steps are as follows:

[“Step 1: Create User Groups \(Net Server\)” on page 20.](#)

[“Step 2: Assign Users to Strata Call Manager Application \(Net Server\)” on page 22.](#)

[“Step 3: Assigning Users to User Groups \(Net Server\)” on page 24.](#)

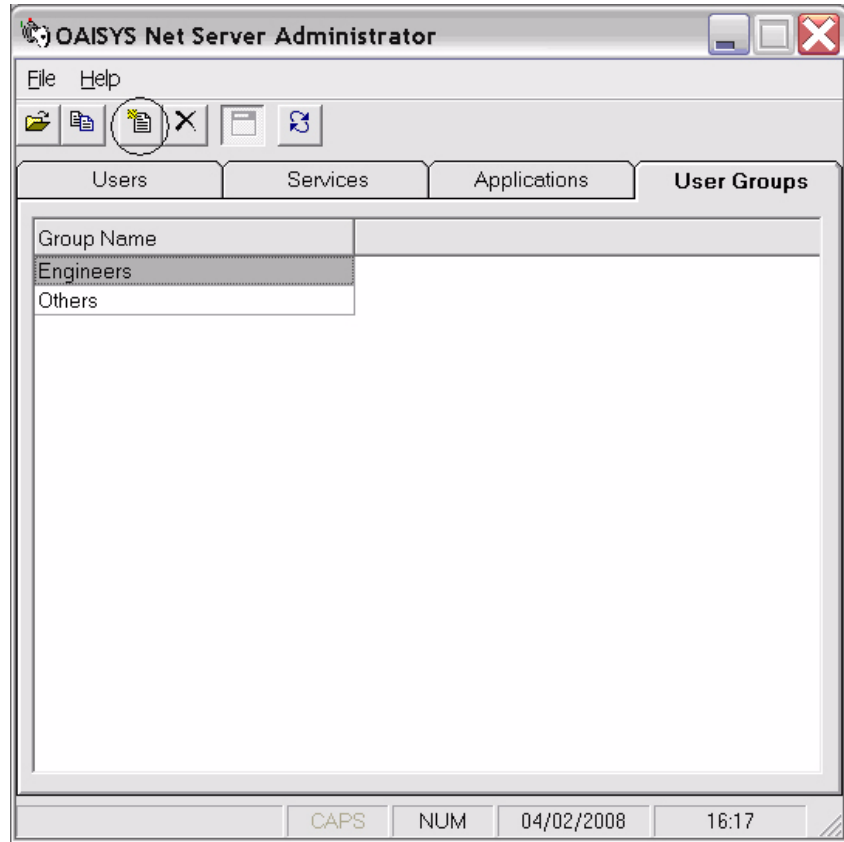
[“Step 4: Create Configuration Files using Admin Strata Call Manager” on page 26.](#)

[“Step 5: Publishing the Configuration Files” on page 28.](#)

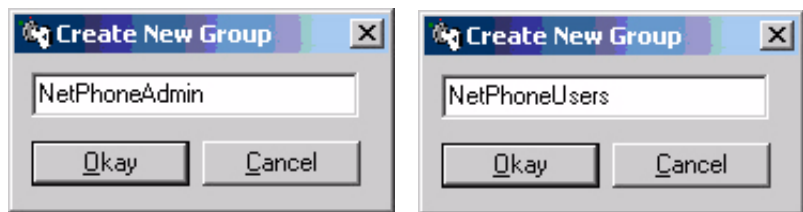
The following steps show an example creating two user groups, users and administrators, and assigning a class of service to each. Multiple groups can be assigned, each with its own configuration created by the Administrator common to that group.

Step 1: Create User Groups (Net Server)

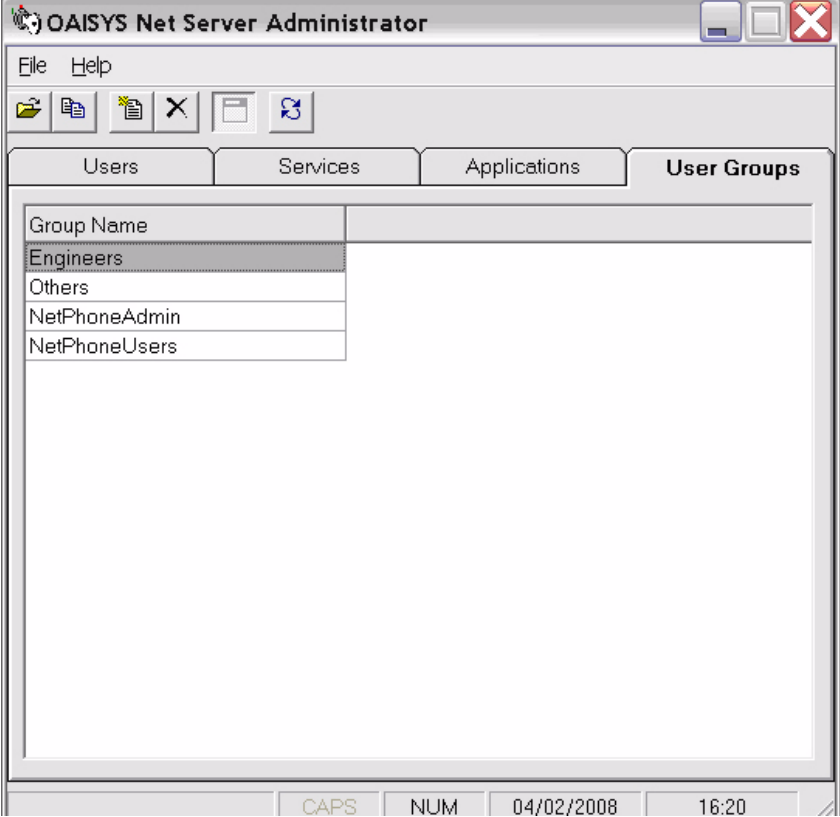
1. Open Net Server Administrator by selecting Setup > Administration from within Net Server.
2. Log in with username admin and password admin.
3. Select the User Groups tab.
4. Click the **Add New Record** button (see circled button in following diagram).



5. Type in a name to represent the Strata Call Manager Administrator (SCMAdmin in this example) and click Okay.
6. Click the Add New Record button again, and this time, type in a name to represent the Strata Call Manager Users' group (NetPhoneUsers in this example).



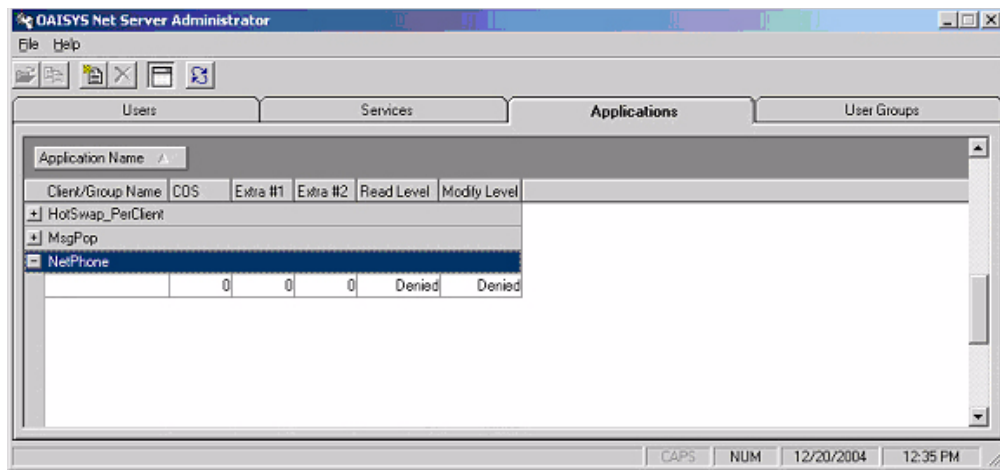
7. Click Okay.
8. Repeat the above steps to create any other Strata Call Manager user groups as needed. The Net Server User Groups should now look like this:



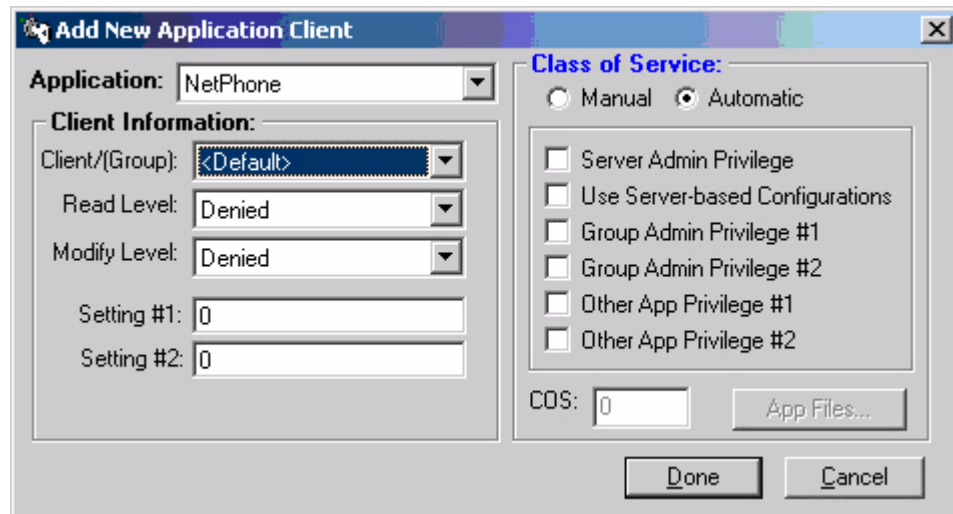
Step 2: Assign Users to Strata Call Manager Application (Net Server)

By assigning User Groups to the Strata Call Manager application, you can assign a common “Class of Service” and “Configurations” for all users in a group. Individuals that are not part of a group can also be assigned as a Strata Call Manager application user.

1. Select the Applications tab. Highlight the Strata Call Manager entry.
 - Named User Groups – You can create named groups (like “NetPhoneAdmin”, “NetPhoneUsers”, etc.) for assignment of a common “Class of Service” and “Configurations” for everyone in the group.
 - Individuals – Setup individuals as an Application User ONLY to exclude them from the <Default> group.
 - <Default> group – Setup this group as a ‘catch-ALL’ group. That is, anyone not specifically listed in a named group is assumed to belong to this <Default> group.



2. Add User Groups to Strata Call Manager – Click Add New Record. The following window displays:



- Select the newly created NetPhoneAdmin Group from the Client/(Group): drop-down box.

- Select World for both Read Level and Modify Level from their respective drop-down boxes.
- Place a checkmark in the Server Admin Privilege checkbox. The window should now look like this:

Add New Application Client

Application: NetPhone

Client Information:

Client/(Group): (NetPhoneAdmin Group)

Read Level: World

Modify Level: World

Setting #1: 0

Setting #2: 0

Class of Service:

Manual Automatic

Server Admin Privilege

Use Server-based Configurations

Group Admin Privilege #1

Group Admin Privilege #2

Other App Privilege #1

Other App Privilege #2

COS: 1

Group Files...

Done Cancel

- Click Done.
3. Repeat by highlighting the NetPhone entry and click the Add New Record button again.
- Select the NetPhoneUsers Group created previously from the Client/(Group) drop-down box.
 - Select Denied for both the Read Level and Modify Level from their respective drop-down boxes.
 - Uncheck the Server Admin Privilege checkbox.
 - Place a checkmark in the Use Server-based Configurations checkbox. The window should now look like this:

Add New Application Client

Application: NetPhone

Client Information:

Client/(Group): (NetPhoneUsers Group)

Read Level: Denied

Modify Level: Denied

Setting #1: 0

Setting #2: 0

Class of Service:

Manual Automatic

Server Admin Privilege

Use Server-based Configurations

Group Admin Privilege #1

Group Admin Privilege #2

Other App Privilege #1

Other App Privilege #2

COS: 2

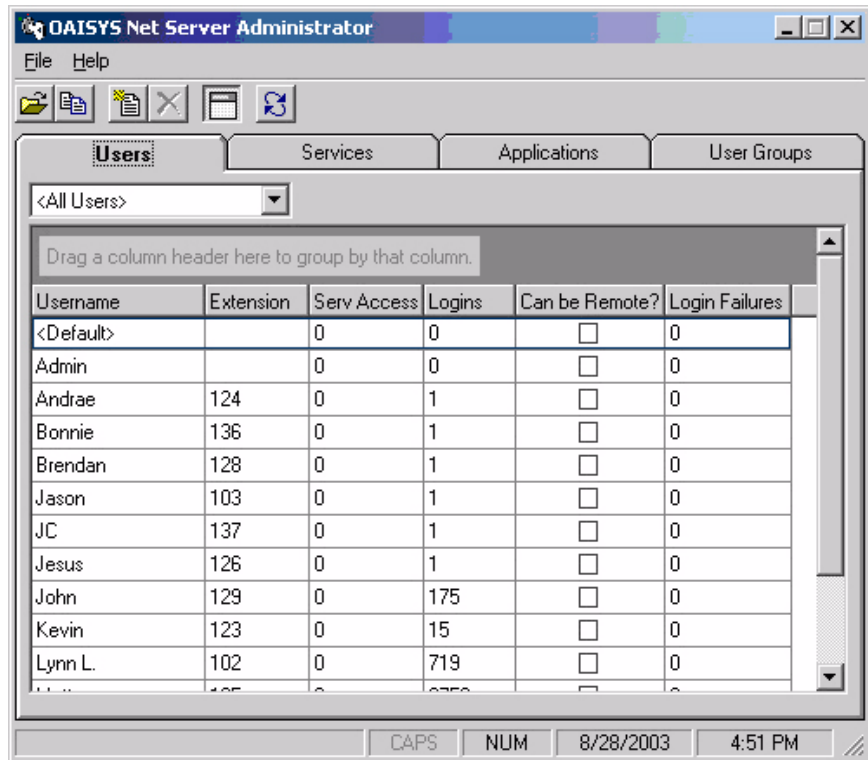
Group Files...

Done Cancel

- Click Done.
9. Repeat the preceding steps to add any remaining Strata Call Manager user groups.

Step 3: Assigning Users to User Groups (Net Server)

1. Select the Users tab. The following screen appears:



To Assign Users as Strata Call Manager Administrators

1. Scroll down the list of User Names.
2. Double-click on the User Name (NPAdmin – 1000 in this example.) to be a Strata Call Manager Administrator.
3. Create a new user if not found.

- Place a checkmark in both the Admin and Users groups as is shown in the following screen:

The screenshot shows the 'Edit Client' dialog box. On the left, there are input fields for 'Username' (NPAdmin), 'Password' (empty), 'Extension' (1000), 'Svc Access' (0), and 'Logins' (0). Below these is a 'Change Password' checkbox which is unchecked. On the right, under 'Client Belongs to These Groups:', there is a list with two items: 'NetPhoneAdmin' and 'NetPhoneUsers', both of which have checkmarks. At the bottom right of the list area is a 'New Group...' button. At the bottom of the dialog are 'Done' and 'Cancel' buttons.

- Click Done.
- Repeat for other Strata Call Manager users to be assigned as Administrators.

Assign Users as Strata Call Manager Users

- Scroll down the list of User Names
- Double-click on the User Name (NPUser – 2000 in this example.) to be a Strata Call Manager User.
- Place a checkmark in the User group only as is shown in the following screen:

The screenshot shows the 'Add New Client' dialog box. On the left, there are input fields for 'Username' (NPUser), 'Password' (empty), 'Extension' (2000), 'Svc Access' (0), and 'Logins' (0). Below these is a 'Change Password' checkbox which is unchecked. On the right, under 'Client Belongs to These Groups:', there is a list with two items: 'NetPhoneAdmin' and 'NetPhoneUsers'. 'NetPhoneAdmin' is unchecked, and 'NetPhoneUsers' is checked. At the bottom right of the list area is a 'New Group...' button. At the bottom of the dialog are 'Done' and 'Cancel' buttons.

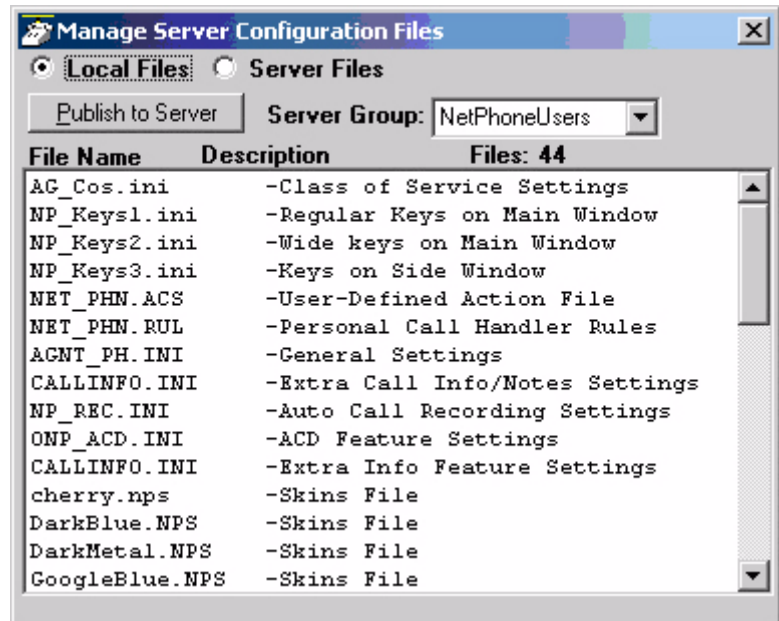
- Click Done.
- Repeat for other Strata Call Manager users to be assigned as Users.

Step 4: Create Configuration Files using Admin Strata Call Manager

Restart the Administrator's Strata Call Manager, if Strata Call Manager is running, shut it down and restart. Set up the buttons, Call Handler rules, skins, etc. as you would like the users' SCM application to be configured. Use the Strata Call Manager User's Guide as needed for how to configure Strata Call Manager. Additional advanced configuration information can be found later in this document.

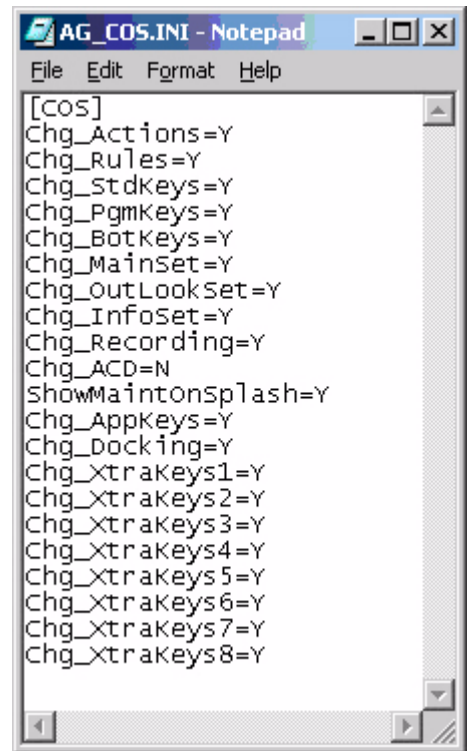
To Change the COS Configuration

1. Once the configuration is done, click the Main Menu icon on Strata Call Manager (top left) and select File > Publish. The following window appears:



2. Select the Server Group: NetPhoneUsers (the group created earlier for users).
3. Left-click on the file name "AG_COS.INI" to highlight it.

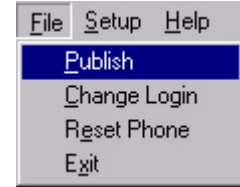
4. Right-click on the highlighted file and choose Edit. The window shown right appears:



5. Change each value from '=Y' to '=N' that should be set and controlled from the Server. Any items left using the '=Y' setting will allow the user to change and keep those settings on that local PC. The file from the server will not be downloaded. (See ["Editing the AG_COS.INI File \(COS\)"](#) on page 33).
6. Click File > Save to save the changes. Close the "AG_COS.INI" file.

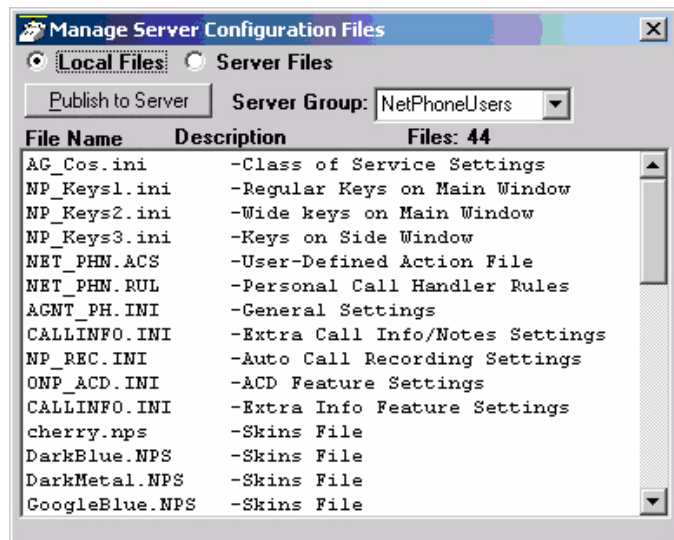
Step 5: Publishing the Configuration Files

When a Strata Call Manager is assigned with “Admin” privileges (either the Server Admin Privilege or the Group Admin Privilege #1), then a Publish item will be provided on the File menu.



When the Publish menu is selected a screen similar to the screen shown right. If you only have the Group Admin Privilege (and not the Server Admin Privilege) then the Group name field will show your group name and you will not be allowed to change it. However if you have the Server Admin Privilege you can publish to any group by entering the group name. By blanking out the group name you will be publishing to the <Default> group area.

- Select NetPhoneUsers from the Server Group drop-down box. From the file list, highlight the files you would like to apply to the users’ Strata Call Manager. It is recommended that all files be selected.



- To publish files to the selected Server Group, click the Publish to Server button.

Note: Always publish the Class of Service Settings file (AG_COS.INI) after editing it to the user-desired settings.

Verification of Settings

The Strata Call Manager at each desk must be restarted for the configuration changes to take effect. If you have included the button files in this configuration, verify that the user does not have the ability to change the buttons’ features. (Is this applicable?) If you have included Call Handler rules in the configuration, verify that the user’s Call Handler has the appropriate rules set up. If anything else was included in the configuration, check those settings as well.

Managing files on the Server

Sometimes it may be useful to view and manage the configuration files on the Server. When the radio button on the top of the Manage Server Configuration Files screen is changed to Server Files, a list of the files posted on the server for that group is displayed. Any file can be retrieved from the server by highlighting that file, then right clicking and choosing to Copy File from Server. A warning dialog box will appear asking if you want to replace the corresponding file on your PC. If you answer yes, then you can now edit or

test that configuration. After making changes, use Publish to move the updated file back to the Server.

Note: Always use extreme caution when editing files to only make changes that are appropriate. Any changes in the configuration files will take affect on each Strata Call Manager in the group the next time the Strata Call Manager is either "Reset" or restarted.

Duplicating Configuration Files to Other PCs

Another method for rolling out Strata Call Manager on multiple PCs is to define the configuration on one Strata Call Manager and copy the appropriate configuration files onto other PCs. This method allows users to control their own configurations, while they start from a common configuration. This may be preferable for some installations, especially sites having only a few SCM users.

All files controlling the configuration can be found in your user's Local Settings, typically "C:\Documents and Settings\\Application Data\Toshiba\Strata Call Manager" for Windows XP and under. The directory for Windows Vista and above is "C:\Users\\AppData\Roaming\Toshiba\Strata Call Manager"

Dial Plan Configuration File

The Dial Plan is a key file that can take time to create and test to ensure it works. If not using a server-based Dial Plan, copying this file onto other PCs can save a lot of time in getting multiple SCM users working.

Config File	Description
DIALRULE.INI	Local Dial Plan Rules. Can also be copied to Server for Server-based Dial Plan.

Strata Call Manager Configuration Files

The following .INI files control the major configuration parameters for Strata Call Manager. Use caution when copying these files since using Strata Call Manager continuously stores information in these files. It is recommended to copy these files when initially deploying Strata Call Manager, but since personal preferences are also stored in these files, overwriting these files after users have started using their Strata Call Manager could erase these settings.

Config File	Description
AGNT_PH.INI	Main Configuration File
ONP_ACD.INI	ACD Feature Settings
NP_REC.INI	Record-a-Call Settings

Button Configurations The buttons can be defined on one PC and copied to other PCs to create an identical set of functions. The following files define the configurations of the buttons on the phone.

Key Configs	Description
NP_KEYS1.INI	Defines Shortcut Keys, Keys on Main NP screen (except ACD wide keys), and current Skin selection.
NP_KEYS2.INI	Configuration of the ACD wide keys on Main NP screen.
NP_KEYS3.INI	Configuration of keys on right-slide out button grouping.
NP_AppBs.INI	Configuration of links (keys) for optional application features.
NP_XKYS1~8.DAT	1st ~ 8th Bank of Extra Keys

Directory Files The directory files are frequently compiled automatically, but sometimes they may be manually created or manually edited and the same copy needed on multiple Strata Call Manager applications.

Directory Files	Description
MainDir.txt	Strata Call Manager looks for MainDir.txt in the application folder. If found, Strata Call Manager automatically creates: FeatDir.txt and/or the ExtDir.txt file.
ExtDir.txt	The default Extension Directory
FeatDir.txt	The default Feature Code directory listing.
MyDir.txt	The default Personal Speed Dial listing.

User Defined Actions Strata Call Manager uses the compiled list of User Defined Actions. Actions can be created, tested and exported to create *.AC files. Renaming these files accordingly (exported files have a numeric value for a name) and changing the suffix when needed can provide the best way to copy selected actions to other PCs.

Action Files	Description
AGT_PHN.ACS	Compiled User Defined Actions
*.AC	Exported Action file.
*.ACI	Imported by Strata Call Manager upon startup only when an action of the same name does not exist in the compiled set of actions (AGT_PHN.ACS). Thus, when this file exists and the user made changes to this action, the user can revert back to the original operation by deleting the current action in Strata Call Manager, then stopping and restarting Strata Call Manager. This file is renamed to *.AC once imported.
*.AC1	When the last character of the file name extension is a '1' (number), the file is always imported, overwriting an existing action. The file is deleted once imported.

Action Files	Description
*.ACO	When the last character of the file name is 'O' (letter), the file is always imported upon startup, overwriting an existing action. The file is not deleted.
*.AC0	When the last character of the file name is '0' (number), the file is only imported upon startup if the compiled action file is missing (AGT_PHN.ACS).

Personal Call Handling Rules

Strata Call Manager uses the compiled list of Personal Call Handling Rules. PCH Rules can be created, tested and exported to create *.RU files. Renaming these files accordingly (exported files have a numeric value for a name) and changing the suffix when needed can provide the best way to copy selected rules to other PCs.

Directory Files	Description
NET_PHN.RUL	Compiled Personal Call Handler Rules
*.RU	Exported Personal Call Handling Rule
*.RUI	Imported by Strata Call Manager upon startup only when a rule of the same name does not exist in the compiled set of rules (NET_PHN.RUL). Thus, when this file exists and the user made changes to this rule, the user can revert back to the original operation by deleting the current rule in Strata Call Manager, then stopping and restarting Strata Call Manager. This file is renamed to *.RU once imported.
*.RU1	When the last character of the file name extension is a '1' (number), the file is always imported, overwriting an existing rule. The file is deleted once imported.
*.RUO	When the last character of the file name is 'O' (letter), the file is always imported upon startup, overwriting an existing rule. The file is not deleted.
*.RU0	When the last character of the file name is '0' (number), the file is only imported upon startup if the compiled rule file is missing (NET_PHN.RUL).

Advanced Configuration

Some items of the configuration can be changed but are not always present in the Administration interface available to the user. This includes an ability to create a Post Call Survey type of operation, using Extra Call Info items as part of the conditions for creating Personal Call Handling rules and some hidden parameters that should not be readily changed except as part of the initial setup.

Post Call Survey

For Strata Call Manager to conduct a post call survey, a call variable labeled either PC_DEST or ~PC_DEST, needs to be created that contains an extension number where the call will be transferred when and only if the Strata Call Manager hang up button is pressed. Automatically the call will be transferred to the destination defined. This Extra Info field can be created and a value entered using Call Router, Voice Assistant and any Strata Call Manager.

Example

A user would like to have selected calls automatically move to another location when the call is finished. This could be for a Post Call Survey or it

could be for an assistant to collect more detailed information. In this example, the agent uses an assistant to collect more details from the call and wants to send the call to extension 1027.

- Create a User-defined Action of the type Modify Call Information and name it Post Call Followup, choose the Extra Info option and enter a Field Name: PC_DEST and a Value: 1027.
- Create a Programmable Button by right-clicking on a blank button, choose the colors and enter a Label, in this case I will use FollowUp. Choose an Action: User Defined Actions and then select your action Post Call Followup.
- The user now can handle a call and if post call followup is needed, press the FollowUp button and when he ends the call by pressing F12 or clicking key, the call will automatically transfer to extension 1027, his assistant.

Using Extra Information in Personal Call Handler Rules

The Personal Call Handler supports the use of Extra Information when the triggering event is either Call Ringing or Call Answered. The only choice offered in the pull down list is CallerID Name. Additional fields can be inserted by typing the name in the entry box. Following is a list of field names that can be entered into the Personal Call Handler Extra Info field.

Extra Info Field Name	Description
Account	Account code attached to the call
ACDAGT	ACD agent's name
ACDAGTN	ACD agent's code (number)
ACDGRP	ACD group's name
ACDGRPN	ACD group's number
CalledID	Name of called number (DID/DNIS Name)
CalledIDNum	Number called (DID/DNIS number)
CallerID	CallerID/ANI name
CallerIDNum	CallerID/ANI number
CALLPRIORITY	Priority of call within ACD
LastRedir	Last redirected extension number
PC_DEST or ~PC_DEST	Post call survey destination
PREFAGENT	ACD preferred agent's code (number)
~RECFNAME	Tracer/ACR recording file name for this call

~ When a tilde is the lead character in an Extra Info field name, that field cannot be edited and will not display in the Extra Info screen.

Example The Strata Call Manager user may want a special alerting tone whenever a call rings when the caller has selected or indicated to the system the call should be directed to specific agent. In this case, we want to play the Whistle WAV file for this alert function. Thus, we would create a new Personal Call Handling Rule:

- Triggering Event: Call Ringing
- Call Type: Any

- Phone State: Any
- CallerID Number: none Required
- Extra Info: PREFAGENT, Is Present
- Account Code: none Required
- Action (Immediately): Blow Whistle (Action defined to Play WAV file previously created)
- Action (After 'x' seconds): none

Editing .INI Files

Editing the .INI files can change a number of advanced configuration settings. These files contain configuration information, some of which is dynamically written by the application, some are set using the Admin tools on the Main Menu, and others are in the background and require manual editing to cause a different behavior. It is recommended that only those lines shown in the following sections be changed without consultation of TOSHIBA Technical Support.

Editing the INI files can change some advanced configuration settings.

- First, you **MUST** exit the Strata Call Manager program before making the changes. Changes made while Strata Call Manager is running will revert back to their original settings upon exiting Strata Call Manager.
- Use Notepad or other text editor to make the appropriate changes based upon the following descriptions.
- Upon restarting Strata Call Manager, the new settings will take effect.

Editing the AG_COS.INI File (COS)

The most important file on server-based configurations is the Strata Call Manager Class of Service file (AG_COS.INI file). This file not only determines what a Strata Call Manager user can or cannot change on his/her phone but also which configuration files should be used from the server.

Note: This file **MUST** be setup for each group for server-based configuration to operate for that group. Repeat the above procedure for each group.

For each setting =N in this file, the user is not allowed to change that part of the configuration on his/her phone. Also the appropriate configuration file must exist on the server and will be used by the Strata Call Manager.

Item	Config File	Description
Chg_Actions=Y	AGT_PHN.ACS	User-defined Actions
Chg_Rules=Y	NET_PHN.RUL	Personal Call Handler Rules
Chg_StdKeys=Y	NP_KEYS1.INI	1st Bank of Programmable Keys
Chg_PgmKeys=Y	NP_KEYS2.INI	2nd Bank of Programmable Keys
Chg_BotKeys=Y	NP_KEYS3.INI	3rd Bank of Programmable Keys
Chg_MainSet=Y	AGNT_PH.INI	Main Configuration
Chg_OutLookSet=Y	None	Outlook Link Settings*
Chg_InfoSet=Y	CALLINFO.INI	Extra Info Feature Configuration
Chg_Recording=Y	NP_REC.INI	Record-a-Call Settings
Chg_ACD=Y	ONP_ACD.INI	ACD Feature Settings

Item	Config File	Description
ShowMaintOnSplash=N	None	Show maintenance expiration date on splash screen
Chg_AppKeys=Y	NP_AppBs.INI	Optional Application Link Buttons
Chg_Docking=Y	NP_WDock.INI	Screen Docking Configuration
Chg_XtraKeys1=Y	NP_XKYS1.DAT	1st Bank of Extra Keys
Chg_XtraKeys2=Y	NP_XKYS2.DAT	2nd Bank of Extra Keys
Chg_XtraKeys3=Y	NP_XKYS3.DAT	3rd Bank of Extra Keys
Chg_XtraKeys4=Y	NP_XKYS4.DAT	4th Bank of Extra Keys
Chg_XtraKeys5=Y	NP_XKYS5.DAT	5th Bank of Extra Keys
Chg_XtraKeys6=Y	NP_XKYS6.DAT	6th Bank of Extra Keys
Chg_XtraKeys7=Y	NP_XKYS7.DAT	7th Bank of Extra Keys
Chg_XtraKeys8=Y	NP_XKYS8.DAT	8th Bank of Extra Keys

* Settings, once made, can be locked into place by changing this setting to "N".

It is highly recommended that all configuration changes be made on the Administrator's Strata Call Manager and then published to the server. Most of the configuration items can be set up following the Strata Call Manager Settings section of the "Strata Call Manager User's Guide".

Editing the Agnt_Ph.INI File (Strata Call Manager Main)

This configuration file contains many topics, some are controlled using the Preferences Menu settings, some are dynamic and written by Strata Call Manager during its use and others are static and can only be changed by manually editing this file. This section describes those items that need to be manually edited. DO NOT change other items unless instructed by TOSHIBA Technical Support.

Setting the Format of Phone Numbers

Applications some times need a specific format for recognizing phone numbers. Changing the "HyphenFormat1" (%H) and "HyphenFormat2" (%J) parameters will define how the dialed number or CallerID/ANI number will be treated when each of these Call Variables. The phone number received (%P) using ANI or Caller ID is typically 10 digits without any formatting.

[General]

HyphenFormat1=xxx-xxx-xxxx

HyphenFormat2=(xxx)xxx-xxxx

Speed Dial Name

When you dial using a Speed Dial key the label of the key will automatically be attached as the 'name' on that call. To disable this feature set this flag to =N for No.

[General]

SD_UserName=Y

Calls to Act Upon

When you use a Programmable Key with a "User-Defined Action" or a System/PBX Command that action may attempt to affect a call (i.e. Transfer, Divert, etc.). If more than one call is present on the phone, which call should be affected? This CallsToAct value determines which calls and in which order: "T"=Talking, "H"=Holding, "R"=Ringing, and "C"=Clearing. If for example,

you wanted to act on Ringing then holding calls you would set the value to "RH". To disable actions for affecting calls, set the value to =N for None.

[General]

CallsToAct=THR

Message Lamp

On some installations the Red Message lamp (next to the MSG key), may not be desirable as message information is also displayed on the LCD Display. To disable the message lamp, set this flag to =N for No.

[General]

MsgLamp2=Y

Call Logging

Call logging is the process of capturing and writing out call information to a "logging file" at the completion of each call. Strata Call Manager supports logging as a standard feature, writing out the information to a text file so it can be viewed or imported into other programs or databases. The Strata Call Manager Preferences Setup dialogs provide the user ability to enable/disable call logging and choose the types of calls to be reported. The administrator including the format of the data, its header line, the file name, and whether calls to the primary DN or all DNs on the phone are to be included can change other items.

[Logging]	Settings Definitions
Data-Header=Date&tTime&tDir&tPhone&tName&tDur&tAnswer&tAcct&tType&tNotes&tGUID	DataHeader – Column header for log file. Typically you would use a tab-delimited format.
DataFormat=&D&t&T&t%B&t%H&t%N&t%L&t%S&t%A&t%T&t%X("Notes")&t%X("~CHdbGUID")	DataFormat – Data and format of a data record. Typically you would use a tab-delimited format.
LogFile=CallLog.txt	LogFile – Path and filename of text file where logging will occur.
Enabled=Y ^a	Enabled – Logging feature enabled "Y"es or "N"o
MaxSize=1	MaxSize – Maximum size of log file (in megabytes)
CallType=CO1	CallType – Call types that should be logged: "CO", "A"ll, or "IC"
LogSDNcalls=False	Change to =T to log all calls including secondary appearances.

a. These items are now controlled using Setting Preferences (General Tab) and should not be changed by editing this .INI file.

Exporting Call Information

The Exporting Call Information is an action, which can be triggered from a Personal Call Handler rule or by the user pressing a programmable key set with this action. The action first pops up an "Export Information" screen that allows the user to add/review the information to be saved. If any required fields are empty, the user must enter them before being allowed to export. Then when the user presses the Save button, the action formats and exports the information to a text file at the desired location.

The only parameter needed when defining the action is the Path & Filename to which the export should occur. Typically, the target destination will be over a LAN to a system-level PC/database, so it's usually appropriate to have a network drive mapped specifically to the target location (i.e. F:\). Also since exports could be occurring simultaneously from many different PCs, it is recommended to use one of the system variables like &E (your extension number) as part of the filename so that the export filename is unique for each PC – for example: EXT&E.IMP

Export Information requires file-sharing access with Write permissions to the target folder. Users must be able to browse to the target folder and create a file, or Export Information will fail.

The export action can be configured and customized by changing fields in the [Export] section of the Agnt_Ph.INI file. Following is an example configuration.

[EXPORT]	Settings Definitions
RequiredFields=MP	<p>RequiredFields – This parameter is used to designate which fields the user will be required to enter (cannot be left blank) when the "Export Information" screen is presented. The choices of fields includes:</p> <p>M = Main Listed Telephone Number P = Phone number (CallerID or ANI on the call) N = Name (CallerID name) A = Account code D = Destination.</p>
HideFields=D	<p>HideFields – This parameter is used to designate which fields to hide from the user when the "Export Information" screen is presented. Use this to hide fields your agents do not need to enter. The choices of fields includes:</p> <p>M = Main Listed Telephone Number P = Phone number (CallerID or ANI on the call) N = Name (CallerID name) A = Account code D = Destination.</p> <p>Important: Do not Hide a Required field. Users will be unable to save their information if they cannot enter data into all Required fields. You cannot enter data into a Hidden field.</p>

[EXPORT]	Settings Definitions
Line1=@ @LOGON,EXT&E,&E Line2=@ @LEARN,M,%M,%P Line3=@ @DONEIF,SUCCESS Line4=%P,"%N",@ @DEF,@ @DEF, @ @DEF,@ @DEF,@ @DEF	Line1 - Line4 – Up to 4 lines of text can be written on each export. Line1 through Line4 determine the text output to the target file. These lines can contain text; call variables and system variables to provide all of the static and real-time information needed.
DefAcct= DefDest= DefName=	DefAcct, DefDest, DefName – These will be used as the default Account, Destination, and Name fields shown on the "Export Information" screen if these are not already present on the call.
AutoModify=Y	AutoModify – When the user has entered information into the "Export Information" screen, it is typically desirable to immediately attach this information to the telephone call in progress. This flag is used to turn on this feature by setting it to "Y" for Yes. Note If a "Main Listed #" is entered (and this feature is enabled), this main phone number is then substituted for the Calling number on the call, which typically helps ensure success on subsequent screen-pop attempts.
Path=F:\ File=&E.IMP	Path and File – Default values for the location and name of the Export file. These values are only used if the Export Information Action does not include the path and file parameter.

Editing the NP_Rec.INI File (Recording)

When using Tracer Features or Auto Call Record, a Ribbon group can appear on Strata Call Manager to show the recording status, offer the ability to start or stop the recording, and to enter a bookmark into the recording record. These are controlled in the NP_Rec.INI file and can be selected during installation if the Tracer Features option was chosen during installation or can be changed later by manual editing. The file contains a list of default bookmarks and each can be changed to meet your needs or additional ones added by adding a line and incrementing the numerical value.

To Show Recording Status

To have a button appear on the main Strata Call Manager screen to show the status of Tracer call recording set Recd_ViewStatus to "Y".

```
[Recording]
```

```
Recd_ViewStatus=N
```

To Stop/Start Recording

To make the Record button active to allow the ability to either or both start and stop the recording set the following to "Y". Setting these to "Y" also makes this feature available in System/PBX Commands for creating User Defined Actions.

```
[Recording]
```

```
Recd_Start=N
```

```
Recd_Stop=N
```


To Enable Inserting Bookmarks

Strata Call Manager can be used to manually insert bookmarks into the OAISYS Tracer recordings while the call is recording. Change Set_Bookmark to =Y. This setting also makes this feature available in System/PBX Commands for creating User Defined Actions. The lines marked Bookmark1= to Bookmark'x'= provides a naming list for a selection of bookmarks to be inserted. The number of choices can be reduced or increased. Delete lines not needed or add new default bookmarks by incrementing the numerical value accordingly. Replace the text following the '=' character as needed to meet your needs. These bookmarks can be are presented to the user when the user right-clicks the Record button for making a selection.

[Recording]

Set_BookMark=N

Bookmark1=Important Point

Bookmark2=Listen Here

Bookmark3=Phone Number

Bookmark4=Abusive Language

Bookmark5=Customer Service Issue

Bookmark6=Customer Order

Bookmark7=Confirmation

Some applications may want to create unique buttons for frequently used bookmarks. This can be done by creating a User Defined Action, selecting System/PBX Command, then choosing RECORDBKMAR="Bookmark Text". This button will work independently of the bookmarks defined above, thus the user does not need to have the Record Button on Strata Call Manager, but will require the setting Set_Bookmark=Y. If for example, abusive language is a problem, a button can be created using the Record Bookmark action and replacing "Bookmark Text" with "Abusive Language". When the user presses this button this bookmark is inserted into the recording record.

Editing the ONP_ACD.INI File (ACD)

This file controls the ACD features allowing or disallowing the use of ACD keys on the Strata Call Manager. These controls define a set of functions for use with ACD including the ability for the ACD Supervisor to login and take calls or not take calls. The default setting of this configuration file is highly dependant upon the PBX that this Strata Call Manager is connected.

[ACD]	Description
Enabled=N	Set this to =Y to enable this for ACD function
SetWrapUpCOS=N	Set this to =Y to allow users to control the ACD Wrap feature.
3rdLoginCOS=N	Set this to =Y to allow this Strata Call Manager to be used to Login or Logout other ACD agents. This allows an application such as TASKE to manually login and log-out agents.
ACDLCDenabled=Y	Will display ACD messages when =Y.
PDNenabled=Y	Strata Call Manager will only look for calls on the PDN when set to =Y. Will look for calls on all DNs when =N.
MakeUnavailable=N	Does not matter.
ACD_RingOnLCD=Y	Displays ringing call on LCD display when =Y.
ACD_SuperRcvCalls=N	Does not matter. This is controlled while logging into or out of ACD from Strata Call Manager itself.

Editing Chat_COS.INI File (Chat)

The Class-of-Service INI file has the following settings that can be changed using a simple text editor.

[COS]	Settings Definitions
EnableDND_COS=N	Set to =Y to enable the use of a DND function.
SendBroadcastMsgs=N	When set to =Y this user is capable of sending a broadcast message.
ShowEveryone-Group=N	When set to =Y this user will have a group that shows everyone on the system.
AddNewGroup=N	When set to =Y, this user can create new groupings of users.

The Open Architecture provides for integrating applications within Strata Call Manager, such as the Dialer or Chat as well as provides enabling links for other programs running on the PC.

The Strata Call Manager is specifically designed to cooperatively work with many different Microsoft Windows applications. This allows you to do many different things including:

- dialing from other applications.
- automatically screen pop a contact database when a call rings in.
- automatically open call journals to take notes on a call.
- beep your pager when an important call is ringing.
- Log call activity for a permanent record.

Following are a list of the major interfaces provided in Strata Call Manager to integrate with other programs:

- TAPI Dialing Interface – This allows TAPI enabled applications, for example Goldmine 4.0, to dial calls using Strata Call Manager.
- DDE Command Interface – Non-TAPI applications can use this feature to dial and answer calls.
- Command File Interface – For applications that don't have TAPI or DDE capabilities, this interface provides another alternative to dial and answer calls.
- OLE/COM Interface – Strata Call Manager is an OLE server and as such supports a number of Methods that other applications can use to perform actions like to dial and answer calls.
- Outlook Phone Link – Microsoft Outlook is a powerful contact management program with which Strata Call Manager works very closely. This requires the installation of the Outlook Link application.

Note: Toshiba reserves the right to make changes (including changes, additions, and deletions) to these open architecture interfaces without notification. .

Registry Entries

To help other applications know if and where Strata Call Manager is installed on a PC, the following registry entries are provided:

HKLM\SOFTWARE\Computer Telephony Solutions\NetPhone\install_path
(C:\Program Files\Toshiba\NetPhone)

HKLM\SOFTWARE\Computer Telephony Solutions\NetPhone\exe_path
(C:\Program Files\Toshiba\NetPhone\netphone.exe)

Companion Applications Suite

The Strata Call Manager has a powerful “open architecture” capability that allows companion applications to be installed to extend the features and functions of Strata Call Manager. These companion applications inherit the look-and-feel of Strata Call Manager so they act as if they are “part of the Strata Call Manager”.

Many companion applications have already been developed including: “Call History”, “Extension Directory”, “Personal Directory”, “Buttons” and an “Integrated Web Browser”.

When a companion application is installed, one or more additional tabs appear at the bottom of the main Strata Call Manager screen. These tabs provide the access to the companion application for the user. The companion applications appear in the lowest panel of the main Strata Call Manager screen.

Configuration

The appearance and configuration of these tabs is setup and controlled by registry entries. Contact Technical Support for details before adding an application not specified in the Installation File.

Open Architecture Links

DDE Command Interface

The Strata Call Manager provides a DDE interface so that other programs can be setup to send commands to dial, answer, and hang-up calls plus other capabilities. This is quite useful, for example, when using a PIM or contact manager program like Commence or DayTimer Organizer (or any program that supports DDE dialing) to look up and dial a phone number.

This DDE interface requires the following:

Application Name:	AGNTPLUS
Topic:	SYSTEM
DDE Execute String:	<Command> See below for available commands.

Call Control Commands

Dial Call	To dial an extension or outside phone number
Formats:	1) DIAL, "Phone Number", "Name", "Account" 2) [DIAL, "Phone Number", "Name", "Account"] 3) [DialNumber ("Phone Number", "Outside Number", "name", "account")]
Where:	Phone Number = number to be dialed Name = Name of person (for outside calls only) Account = account number to attach (for outside calls only)
Answer Call	Answer the oldest Ringing or Holding call.
Formats:	1) ANSWER 2) [ANSWER] 3) [AnswerCall (" ")] 4) ANSWERCALL,<CallID> Answer a specific call.
Where:	
Hang Up	Hangup on a call.
Formats:	1) DropCall 2) [DropCall ()]

**Strata CIX
Open Architecture Interfaces**

Where:	
Divert Call	Send a ringing call to another destination.
Format:	DIVERT, "CallID", "Phone Number", "Mbox"
Where:	CallID = PBXCall ID of call, or if "" then Longest Ringing call will be assumed. Phone Number = Inside or Outside phone number, Outside must have a comma – if comma is first , use Trunk Access Code programmed in Strata Call Manager. Mbox = Voice Mailbox extension if call is going to V-mail.
Modify Call	Change or attach info to an Outside call.
Format:	MODIFY, "CallID", "Phone Number", "Name", "Acct"
Where:	CallID = PbxCall ID of call. Phone Number = Outside phone number. Name = Outside number's name. Acct = Account number to be attached to the call.
DSS Call	Dial or XFR call (depending on whether the phone is on a call)
Formats: Outside Calls Internal Calls	1) DSS, KEY, "Phone Number", "Name", "Acct", XfrType 2) DSS, KEY, "Ext #", "Mbox", "", XfrType
Where:	Phone Number = Outside phone number. Name = Outside number's name. Acct = Account number to be attached to the call. Ext# = Extension number. Mbox = Voice Mailbox extension if call is going to V-mail
	XfrType = 0 -- Allow transfer to be announced (use Centrex if outside to outside) = 1 -- Do immediate (Blind) transfer = 2 -- Transfer to Hole (IC destinations only) >= 10 -- Don't transfer (Dial only)
Hold Call	Place a call on hold.
Format:	1) HOLD
Where:	
Dial Feature	To dial a feature code.
Format:	FEAT, "feature code"
Where:	Feature code = Your CIX feature activation code.
Start Recording	To start recording the call using either Auto Call Record or Tracer.
Format:	REC_START, PBX_CallID, Ext#
Where:	PBX_CallID = ID of call to be recorded. If left blank the "Talking" call will be assumed.. Ext# = Extension on call, if blank the Strata Call Manager Ext will be assumed
Stop Recording	To stop recording.
Format:	REC_STOP, PBX_CallID, Ext#

Strata CIX

Open Architecture Interfaces

Where:	PBX_CallID = ID of call to be recorded. If blank the existing "Talking" call will be assumed. Ext# = Extension on call, if blank the Strata Call Manager Ext will be assumed.
Add Bookmark	Add bookmark to recording in progress.
Format:	REC_BKMARK, PBX_CallID, BookMarkStr
Where:	PBX_CallID = ID of call to be bookmarked. If blank the existing "Talking" call is assumed. BookMarkStr = Test of bookmark. If blank the users extension number is used.
Transfer Call	Transfer a call.
Format:	XFR,"CallID","Phone Number","Mbox",XfrFlag,DNDFlag
Where:	CallID = ID of call to be transferred. If blank the existing "Talking" call is assumed. Phone Number = Inside or outside phone number, outside must have comma – if comma is first, use Trunk Access Code from Dial Plan. Mbox = If CallID is blank, and Mbox is blank, Mbox = Ext number of Strata Call Manager. XfrFlag = "1" – blind Xfr, = 2 – Xfr to Hold, else – Announced. DNDFlag = "Y" for DND override.

Phone Control Commands

Minimize Strata Call Manager Window	Sends the Strata Call Manager window down into the tray.
Formats:	1) MINIMIZE 2) [Minimize ()]
Where:	
Restore Strata Call Manager Window	Brings the Strata Call Manager window back into its last position on the screen before being minimized.
Formats:	1) RESTORE 2) [Restore ()]
Where:	
Dial A Feature Code String	Dial a feature code string.
Formats:	FEAT,"Feature Code
Where:	Feature Code = The feature code to be dialed.
Set DND	To turn on or off DND with an optional message.
Format:	SET_DND, DNDnum, Msg
Where:	DNDnum = 0 = DND off, 1 – 20 = Top-line of DND message. Msg = 2nd line of DND message

ACD Commands

Agent Login	Log into an ACD Group.
Format:	ACD_LOGIN, AgentID, Pilot, ForExt, popup
Where:	AgentID = leave blank if not by AgentID, "*" = use last Agent ID used Pilot = ACD group extension, left blank = ALL ForExt = Blank = 1st-party, Non-blank – target 3rd-party extension Popup = Non-blank – means popup Strata Call Manager. If = "L" then also popup the Login/Logout screen.
Example:	ACD_LOGIN,,, = Log me into all my ACD groups
Agent Logout	Log out of an ACD Group.
Format:	ACD_LOGOUT, AgentID, Pilot, ForExt, popup
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used Pilot = ACD group extension, left blank = ALL ForExt = Blank = 1st-party, Non-blank – target 3rd-party extension Popup = Non-blank – means popup Strata Call Manager. If = "L" then also popup the Login/Logout screen.
Set Wrapup	End or set a wrapup time.
Format:	ACD_WRAPUP, AgentID, TimeSecs
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used TimeSecs = If blank or zero – it will "Clear Wrapup", If non-zero it will set the agent state to Wrapup (WNR) for this amount of time.
Monitor Call	Monitor a call on this extension.
Format:	MONITOR_CALL, Ext#
Where:	Ext# = Extension of phone on a call
Add Me	As Agent Help Supervisor for this extension
Format:	ADD_TOCALL, Ext#
Where:	Ext# = Extension of phone on a call

Other Commands

Run Action	To run a Strata Call Manager User Defined Action.
Format:	DO_ACTION, ActionName
Where:	ActionName = Name of user-defined action to be run
Copy Info	To copy information about this call into Windows Clipboard.
Format:	CLIP_CALL, CID, FieldName, CallStatus
Where:	CID = leave blank to use 'CallStatus' or Strata Call Manager's 'Most Likely' FieldName = Name of field to be read - "CID", "CallerID", "CallerIDNum", "CallStatus", "Account" are 'standard' fields, but any 'extra-info' field can also be read. CallStatus = Only used if CID blank, find first call matching these types "T"alking, "R"inging, "H"olding, or "C"learing. Note: If no calls match, it will put a Null on the clipboard.
Example:	CLIP_CALL, , CID, "T" = Return the Call ID of the first "T"alking call.
Set Info	Set information value on a call.
Format:	SET_INFO, CID, FieldName, "FieldValue", CallStatus
Where:	CID = Strata Call Manager's Call ID for the desired call. This could be provided using the %I variable. Or leave blank (" ") if you want to use CallStatus or Strata Call Manager's most likely call. FieldName = Name of the field to be set - "CallerID", "CallerIDNum", "Account" are standard fields, but any "extra-info" field can also be set. FieldValue = The Info string that is to be attached. CallStatus = Only used if CID is blank. Find first call matching these types "T"alking, "R"inging, "H"olding, "C"learing. However, this field is also blank, Strata Call Manager will use the mostly likely call.
System Command	Execute a system command.
Format:	SYSTEMCMD, Command String
Where:	Command String = Command string and parameters to be performed.
Calendar Appointment	Outlook Calendar sends an indication whenever the appointment status is changed. Typically, these will occur when an appointment starts and again when it ends. This command could also be used by other applications to send information to Strata Call Manager. Use the %OC token in a User-defined Action to access the information.
Format:	CALSTATUS, BusyStatus, Start, End, Subject , Importance, Location , RemindBefore
Where:	BusyStatus = 0 (Free), 2 (Busy), 3 (Out of Office) Importance = 0 (Low), 1 (Normal), 2 (High)
Example:	CALSTATUS,2,8/18/2005 4:12:00 PM,8/18/2005 4:42:00 PM, Staff Meeting ,1, Tempe ,15

Calendar Reminder	Outlook Calendar sends an indication relating to the reminder of an appointment. This command could also be used by other applications to send information to Strata Call Manager. Use the %OR token in a User-defined Action to access the information.
Format:	CALREMIND,BusyStatus,Start,End, Subject ,Importance, Location ,RemindBefore
Where:	BusyStatus = 0 (Free), 2 (Busy), 3 (Out of Office) Importance = 0 (Low), 1 (Normal), 2 (High)
Example:	CALREMIND,1,8/19/2005 10:25:00 AM,8/19/2005 10:30:00 AM, Meeting ,1, Home ,5

Command File Interface

Strata Call Manager also supports all of the above commands through a 'command file' interface so that programs that don't have DDE capabilities can send commands if they can simply create and write to a TXT file. The Strata Call Manager monitors its "\REQ" subdirectory for command request files to appear with the filename <fname>.REQ or an <fname>.RER. It will then open the file and read one line for a command (in the format above), attempt to execute the command, and then delete the command file.

For example, if you create a file called "MY_CMD.REQ" (in the "\REQ" subdirectory) that contains one line containing the text string: DIAL, "496-9040", Strata Call Manager will detect this file and execute this command, dialing the phone number "496-9040".

OLE / COM Interface

The TOSHIBA Strata Call Manager also supports many of the above commands plus some additional commands through an "OLE interface" so programs that support OLE can call methods directly.

In VBA script, the script code would look similar to the following example to "Answer" a call.

```
Dim ApNet As Object
Dim Suc As Integer
Set ApNet = New AgntPlus.cPhone
Suc% = ApNet.Answer( )
```

Call Control Commands

Answer Call	Answer the first ringing or holding call.
Format:	Answer () AnswerCallID (PBX_CallID) Answers a specific call, ringing or holding.
Where:	PBX_CallID = PBX CallID as represented in '&B'.
Dial Call	To dial an extension or outside phone number.
Format:	Dial (Num, Name, Account)
Where:	Num = number to be dialed Name = Name of person (for outside calls only) Account = account number to attach (for outside calls only)

Hold Call	To place a call on hold.
Format:	Hold ()
Where:	
Hang Up	Hangup on a call.
Format:	Hangup ()
Where:	
Divert Call	Move a ringing call to another destination.
Format:	Divert (ID, Num, Mbox)
Where:	ID = " " then longest ringing call will be assumed Num = Inside or outside phone number, outside must have comma – if comma is first, use Trunk Access Code programmed in Dial Plan. Mbox = If ID is blank, and Mbox is Blank, Mbox = Ext number of Strata Call Manager
Transfer Call	Transfers a call to a specific destination.
Format:	Transfer (CID, Num, Mbox, XfrFlag, DNDOVERRIDE)
Where:	CID = Strata Call Manager's Call ID for the desired call (i.e. this could have been provided to the app using an event from Strata Call Manager with %I variable). Or leave blank (" ") if want to use the call on which you are presently "Talking". Num = Inside or outside phone number, outside number must have a comma – if comma is first, use Trunk Access Code from the Dial Plan. Mbox = Mailbox number to receive the call if "Num" is V-mail number. XfrFlag = 1= Blind Xfr, 2 = Xfr to Hold, else - Announced DNDOVERRIDE = "Y" for DND override (if available)
Example:	Transfer ("", 2502, 1010, "", "") = Transfer call to V-mail extension into V-mailbox "1010".
Start Recording	To start recording the call using either Auto Call Record or Tracer.
Format:	RecordStart (PBX_CallID, Ext#)
Where:	PBX_CallID = ID of call to be recorded Ext# = Extension on call, if blank the Strata Call Manager Ext will be assumed
Stop Recording	To stop recording.
Format:	RecordStop (PBX_CallID, Ext#)
Where:	PBX_CallID = ID of call to be recorded Ext# = Extension on call, if blank the Strata Call Manager Ext will be assumed.
Record a Bookmark	Add a bookmark to the recording in progress.
Format:	RecordBkMark (PBX_CallID, BookMarkStr)

Where:	PBX_CallID = ID of call to be bookmarked. If blank the existing "Talking" call will be assumed. BookMarkStr = Text of bookmark. If blank the user's extension number will be used.
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**Phone Control
Commands**

Set Phone View	Sends the Strata Call Manager window down into the tray or brings it back to its normal view on the screen.
Formats:	SetPhoneView (ViewType)
Where:	ViewType = 0 = Normal , 1 = Minimized
Dial Feature Code	Dial a feature code string.
Formats:	DialFeature (FeatStr)
Where:	FeatStr = Feature code of the PBX.
Set DND	To turn on or off DND with an optional message.
Format:	SetDND (DNDNum, Line2)
Where:	DNDnum = 0 = DND off, 1 – 20 = Top-line of DND message. Line2 = 2nd line of DND message.

**ACD Agent
Commands**

Agent Login	Log into an ACD Group.
Format:	ACD_LogIn (AgentID, PilotExt, PhoneExt, PopUp)
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used PilotExt = ACD group extension, left blank = ALL PhoneExt = Blank = 1st-party, Non-blank – target 3rd-party extension PopUp = Non-blank – means popup Strata Call Manager
Agent Logout	Log out of an ACD Group.
Format:	ACD_LogOut (AgentID, PilotExt, PhoneExt, PopUp)
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used PilotExt = ACD group extension, left blank = ALL PhoneExt = Blank = 1st-party, Non-blank – target 3rd-party extension PopUp = Non-blank – means popup Strata Call Manager
Monitor Call	Monitor a call on this extension.
Format:	MonitorCall (Ext#)
Where:	Ext# = Extension of phone on a call
Add Me	As Agent Help Supervisor for this extension.
Format:	AddMeToCall (Ext#)
Where:	Ext# = Extension of phone on a call.

Other Commands

Perform Action	To run a Strata Call Manager User Defined Action.
Format:	PerformAction (ActName, ActType, ActParm)
Where:	ActName – Can be the label on a key. ActType – Number of action: 1 = dial feature, 2=dial number; 3=OAI command; 5=User-Defined action, 7=Pop URL; 8=Run Pgm ActParm -- Parameter for the selected action (i.e. "4969060" for phone number).
Run Action	To run a Strata Call Manager User-Defined Action.
Format:	PerformUserAction (ActionName)
Where:	ActionName = Name of User-Defined action to be run
Get File	Retrieve a file from Server.
Format:	GetFile (FromPath, ToPath)
Where:	FromPath = Complete path name of file to retrieve. ToPath = Complete path name folder to place file.
Get Info	This can be used to read a number of different values of information. Returns a string value.
Format:	GetInfo (FieldName)
Where:	FieldName = Value to be read back including: AGENTID – present setting of the last used AgentID EXEPATH – path to where the NetPhone is running DND – setting of DND feature (" " = off) FWD – setting of FWD feature (" " = off) EXTNAME – PBX username associated with NetPhone PDN – Primary Directory Number for NetPhone " " – Return PBX Extension Number for NetPhone
Get Call Info	Returns a sting value containing the value of the field designated.
Format:	GetCallInfoField (CID, FieldName, CallTypes)
Where:	CallID = Leave blank if want to use 'CallTypes' FieldName = Name of field to be read -- "CID", "CallerID", "CallerIDNum", "CallStatus", "Account" are 'standard' fields, but any 'extra-info' field can also be read. CallTypes – Only used if CID blank, Find first call matching these types "T"alking, "R"inging, "H"olding, "C"learing. Note: If no calls match, a Null string will be returned.
Example:	GetCallInfoField (" " , Account, "R") = Return the Account number of the first "R"inging call
Copy Info	Copy Info about call into Windows Clipboard – Copies a string value containing the value of the designated field into the clipboard.
Format:	ClipCallInfoField (CID, FieldName, CallTypes)

Strata CIX
Open Architecture Interfaces

Where:	<p>CID = leave blank if you want to use "CallTypes" or Strata Call Manager's most likely call.</p> <p>FieldName = Name of field to be read – "CID", "CallerID", "CallerIDNum", "CallStatus", "Account" are standard fields, but any extra-info field can also be read.</p> <p>CallTypes = Only used if CID is blank. Finds first call matching these types – "Talking", "R"inging, "H"olding, "C"learing. If no call matches, it will place a NULL on the clipboard.</p>
Get Feature List	Returns bit list (long integer) of enabled features as follows:
Format:	GetFeatBitList ()
Where:	<p>SHOWRECORD = &H1& -- allowed to show "Recording-in-progress" indication</p> <p>STARTRECORD = &H2& -- allowed to manually start a Recording</p> <p>STOPRECORD = &H4& -- allowed to manually stop a Recording</p> <p>ACDENABLED = &H8& -- allowed to access ACD features (login, logout)</p> <p>ACDLOGIN3RD = &H10& -- allowed to access ACD features for 3rd parties (that is other phones).</p> <p>Note: The ACDENABLED bit must also be set.</p>
Set Info Field	Set information field on a call.
Format:	SetCallInfoField (CID, FieldName, FieldValue, CallStatus)
Where:	<p>CID = Strata Call Manager's Call ID for the desired call (i.e. this could have been provided to the app using an event from Strata Call Manager with %I variable). Or leave blank (" ") if you want to use CallStatus or Strata Call Manager's most likely call.</p> <p>FieldName = Name of field to be Set -- "CallerID", "CallerIDNum", "Account" are 'standard' fields, but any 'extra-info' field can also be set.</p> <p>FieldValue = The Info string that should be attached.</p> <p>CallStatus = Only used if CID blank, Find first call matching these types "T"alking, "R"inging, "H"olding, "C"learing. If no calls match this request, a NULL string is set.</p>
Example:	SetCallInfoField ("", "Notes", "Testing", "T") = Set the Notes field to "Testing" on the call in which I am "T"alking.
OutLook Lookup	Lookup phone number in Microsoft Outlook.
Format:	Outlook_LookUp (CID, SearchType, SearchFor, NoMatch, ExactMatch, MultiMatch)

Where:	CID = Strata Call Manager's Call ID for the desired call (i.e. this could have been provided to the app using an event from Strata Call Manager with %l variable). Or leave blank ("") SearchType = "P" for phone number SearchFor = Phone number string NoMatch = What to do if no matches found ExactMatch = What to do if Exact (single) match is found MultiMatch = What to do if multiple matches are found
Example:	Outlook_LookUp ("", "P", "4804969040", "U", "C", "U")
System Command	Perform a PBX/System command.
Format:	PerformSystemCommand (CommandStr)
Where:	CommandStr = Command and parameters to perform. See Strata Call Manager User Guide's User-Defined Actions for details of commands available.
Send Chat	Send a Chat message using TOSHIBA chat client.
Format:	SendChat (sExt, sName, sMsgType, sMsg, sSendOption)
Where:	sExt = The Extension number of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person sName = (don't need to supply if sExt is provided) – The name of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person sMsgType = Future feature – leave blank for now sMsg = Message to be sent sSendOption = "I" - Immediate Message -- send message immediately or "C" (or blank) -- Canned message -- type message into user buffer but wait for user to press SEND
Example:	SendChat ("1001", "", "", "Help! I have an abusive call", "I")
General Command	General (or DDE) Command – this can be used to execute any of the DDE commands described earlier in this document.
Format:	GenCmd (CommandStr)
Where:	CommandStr = Command and parameters to perform.
Example:	GenCmd ("ACD_WRAPUP,,30") = Set Agent state to Wrapup for the next 30 seconds. Note: This command is a low-level command that will allow specialty applications to operate.

Trouble Shooting

Installation Problems

Cause(s):	Solution(s):
TAPI Service Provider Not Matched	
Strata Call Manager searches the installed list of TAPI Service Providers for any entry containing the words "Net Server". The error appears when Strata Call Manager is unable to match the specified text to any TAPI Service Provider.	<p>Ensure the Net Server TSP is installed and appears in the Telephony section of Control Panel.</p> <p>Ensure the TAPI Service Provider entry in Strata Call Manager Setup Preferences Main contains a valid TSP name.</p> <p>Re-install Strata Call Manager with the latest version available to your maintenance plan from Toshiba FYI.</p>
Strata Call Manager Cannot be Installed over the Network	
Network permissions may prevent users from executing files, or the setup file may not be available on a network share.	<p>Check the permissions for the remote user and ensure they have Read and Execute on the setup file.</p> <p>Make sure the setup file is available in a folder or device shared to the network.</p> <p>Contact the local Network Administrator for additional assistance.</p>

TAPI Service Provider Problems

Cause(s):	Solution(s):
Couldn't Resolve Hostname	
The hostname in the configuration dialog is misspelled or does not exist. DNS name resolution may be configured incorrectly.	<p>Check the spelling of the hostname.</p> <p>Ping the Net Server by name. If this fails, try pinging by IP address.</p> <p>If the ping by name fails but the ping by address works, contact the Network Administrator to resolve the DNS problem. Or, use the IP address instead of the hostname.</p>
Connection Failed to Host	
Strata Call Manager contacted the PC listed in hostname, but there was no response from Net Server.	Make sure Net Server is running on the target PC. If connecting through a firewall, ensure TCP port 8767 is open for two-way communication.

Cause(s):	Solution(s):
Invalid Access Password	
The extension is already listed in Net Server Admin with another password.	Check the Client Password in Net Server Admin. This feature prevents malicious users from assuming control of other keysets without permission.
TAPI Service Provider Not Operational	
Windows 98 SE supported the Windows Automatic Update feature. In some cases, Windows Update installed a new version of the TAPI Server on the PC. This updated version was incompatible with the Strata Call Manager TSP.	Check the date on \Windows\System\TAPISRV.EXE – if it is 5/99, it is incompatible with the Strata Call Manager TSP. Current versions of Strata Call Manager Setup automatically install the correct version. Microsoft Windows Update now also installs a newer, compatible version.
Software Key Feature Points Unavailable	
The copykey is not installed on Net Server PC.	Attach the hardware key to the Net Server PC parallel port and click Re-Read Copy Key on Net Server Copykey tab.
The copykey does not contain Strata Call Manager licenses, or all available Strata Call Manager licenses are currently in use.	View the number of points available on the key using the Copykey service entry on the Net Server Services tab. DFES determines the number of Strata Call Managers allowed. SCM requires 22 DFES units per copy. Other applications may also use DFES units, such as DSS and Chat. If other users are running copies of these programs without permission, those applications may be using feature units intended for Strata Call Manager users. You may need to add additional points to the key by purchasing additional software licenses.
Service Unavailable	
Strata Call Manager connected to Net Server, but Level 2 OAI Service has not yet logged into Net Server. OAI connection may be down.	Check Net Server and Level 2 OAI. Make sure Level 2 OAI is communicating with the PBX.
Extension Already Exists	
Problem occurs because Strata Call Manager is attempting to connect with an extension number that already exists in the db. Name and Password must match exactly for this to work. This feature prevents people from using Strata Call Manager to take over other phones (intentionally or accidentally.)	Install Net Server Administrator, and either remove the Client Extension record, or copy the name and password to the PC client(s).

**Configuration
Problems**

Cause(s):	Solution(s):
Could Not Add New Client to Database	
The username is already listed in the Net Server Database with another extension.	Change the username, or delete the existing user from Net Server Administrator.

Cause(s):	Solution(s):
Strata Call Manager is Running in Demo Mode	
May not be connecting to Net Server.	Verify Net Server is operational and Strata Call Manager is pointing to the server's name or IP address.
May not have enough feature points to run Strata Call Manager.	Check the available feature points on Net Server. Make sure there are sufficient licenses available for the number of active copies of Strata Call Manager.
If you received a feature point upgrade, the Copy Key Upgrader may not have accepted the enabler code.	Copy Key Upgrader didn't add all of the feature points. Check that you are using the latest version of Net Server. You can also download a Copy Key patch file for Net Server 3.1.128 or lower. Apply the patch or install a current Net Server. Then re-apply the enabler code.
Strata Call Manager Buttons are Transparent	
Net Server could be down.	Verify that Net Server is operational.
You may have the wrong IP address selected for the Net Server.	Verify the server name/IP address in Strata Call Manager.
Some early versions of Strata Call Manager did not install properly.	Reinstall a current version of Strata Call Manager. One can be downloaded from http://support.Toshiba.com .
The color settings may be incorrect.	Try a different color depth (256 colors, true color).
The screen resolution may be interfering with Strata Call Manager.	Try a different screen resolution (640x480, 800x600, 1024x768).
The video driver may not work with Strata Call Manager.	Get the model number of the video board. Check for more current drivers.
Strata Call Manager is Dialing an Area Code for Local Calls	
The local Dial Plan Rules are configured incorrectly.	Go to Preferences Dialing and check the local Dial Plan settings. Make sure "Dial Area Code on all Local Calls" is not checked.
The Server Dial Plan Rules are configured incorrectly.	Go to Preferences Dialing and Check Plan next to "Use SERVER Dial Plan." Test local numbers using the Tester. If the numbers are formatted incorrectly, modify the Dial Plan Server settings on the PC.

Cause(s):	Solution(s):
None of the Buttons on Strata Call Manager Work	
3rd party call control and/or system level events may not be enabled.	3rd party call control and System Level Events must be turned on in CIX programming.
Strata Call Manager Drops into the System Tray and Will Not Run.	
You may have the wrong hostname for the NetServer.	Check the hostname: Open Control Panel/Phone and Modem Options and select the Advanced tab. There, select the Net Server TAPI Service Provider press the Configure button.
Undetermined problem with hostname resolution.	This problem may be resolved by using the IP Address instead of the hostname.

**Third Party Out
 Dialing/Screen Pop
 Problems**

Cause(s):	Solution(s):
Strata Call Manager Hangs Up when Clicking Anywhere in Goldmine	
The Goldmine TAPI subsystem does not respond properly after initiating a TAPI dial. Clicking anywhere in Goldmine sends a TAPI disconnect to Strata Call Manager, causing Strata Call Manager to hang up the call.	Install TAPI Link and configure Goldmine to use it instead of the Strata Call Manager TSP.
TAPI Outdial is Not Working with Goldmine on Win2000	
The TAPI Service may not allow users to access the service.	Review the Goldmine Application Note for details on allowing PC users to interact with the Telephony service.
Strata Call Manager Will Not Screen Pop Outlook	
Outlook Link is not installed.	Strata Call Manager requires Outlook Link to work with Outlook. Download and install the latest Outlook Link from Toshiba FYI or re-install Strata Call Manager choosing Microsoft Outlook on the screen asking to select an integration option. Note: Outlook cannot be running when you install Outlook Link.

**Miscellaneous
Problems**

Cause(s):	Solution(s):
Call History File is getting too big	
The Call History feature logs all calls to a text file.	Call History is logged to a file, by default, the callog.txt file in the User's Local Settings folder. When the callog.txt file exceeds the limit defined in the Agnt_Ph.INI configuration file (default size is 1 Mbyte), the callog.txt file is renamed callog.prv and a new callog.txt will automatically be started.
Strata Call Manager Hangs Up After Dialing an Outgoing Call	
Personal Call Handler may have a rule configured incorrectly.	Review the PCH Rules for any that might attempt a Transfer or Disconnect when a call is answered. Also look for any rules that might execute a Transfer or disconnect while the phone is active on another call and a new call arrives.
Strata Call Manager Error using btn32x10.ocx	
IE 5 may not be installed. Strata Call Manager requires IE 6.	Install Internet Explorer 6.0, or re-install Strata Call Manager with the latest version available to your maintenance plan from http://support.Toshiba.com
DLL's may be missing or the .ocx file may not have been registered on install.	Make sure msvcr40.dll and mfc40.dll are present in <Windows root>\system or \winnt\system32. Run "regsvr32 <systemroot>\<system32>\btn32x10.ocx" from a DOS prompt.
Strata Call Manager Message Light blinks, "No Message to Retrieve" when clicked	
System OAI does not provide complete information on message indicators. Strata Call Manager must track message status internally, and sometimes loses sync with the actual message count.	Restart Strata Call Manager.

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