

***Strata*[®]CS**
Communication Server

**Persistent Pager Add-on
User Guide**

Publication Information

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SCS-UG-PPAGR-VA
4016221

Version A, August 2002

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Introduction

This guide describes how to install, set up, and run the Persistent Pager Add-on features for the Strata Communication Server (CS).

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!	Calls attention to important instructions or information.
➤	Denotes a procedure.
>	Denotes a sequence of computer menu or screen selections. For example: Choose Start > Programs > Call Center Scoreboard.

Related Documents/Media

Note Some documents listed here may appear in different versions on the CD-ROM, FYI, 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.

The following companion documentation is available:

- Strata CS Quick Reference Guide
- Strata CS Quick Reference Card
- Strata CS Digital Telephone User Guide
- Strata CS Analog Telephone User Guide
- Strata CS Library CD-ROM

Persistent Pager

The Persistent Pager is a Strata CS Add-on Solution. The Persistent Pager extends the capabilities of Strata CS by sending multiple pages for new voice messages. Users are paged, at specified intervals, until the voice message has been listened to or deleted. The Persistent Pager can enhance your business by ensuring that important messages are retrieved in a timely manner.

Components

The Persistent Pager has two components: the Administrator and the Monitor.

The Administrator is used to set up the Persistent Pager for use and includes the ability to define your agents (name and pager number), create shifts for your agents, specify which mailboxes to monitor, and other details related to setup of the system. The Administrator can be run on the Strata CS Server or on any networked machine, allowing remote administration of the application.

The Monitor is used to start and stop the Persistent Pager as well as display the current activity of the system on screen. Details related to logging and debugging the system can be set from the Monitor. The Monitor must be run on the Strata CS Server.

Installation

Important! *Installation requires a restart of the Strata CS Server, so only attempt this after-hours when you can shut down the Server without interrupting users. Make sure to shut down the Strata CS Server before beginning installation.*

Note Application software for this add-on application must be downloaded from the Toshiba FYI site at <http://fyi/techsupport/software/stratasystem/cs>. You must be CS certified to access this site. To obtain an activation license, contact your Toshiba Customer Service Representative.

The Persistent Pager requires Strata CS 4.x.

Note If you are upgrading from the 3.5 version of the Persistent Pager and want to save your old configuration settings, back up the Pager.mdb file. Once you are finished installing the 4.0 Persistent Pager, replace the installed Pager.mdb file with your old 3.5 Pager.mdb file.

Step 1: Install TeleVantage SDK

The Persistent Pager requires that the TeleVantage SDK is installed. Therefore, before installing the Persistent Pager, install the TeleVantage SDK.

1. Run the TVSDK.exe program located in \Server on the TeleVantage CD-ROM.
2. Follow the instructions in the TeleVantage SDK Setup window.

Important! *Steps 2 and 3 below assume you have successfully downloaded the Persistent Pager. Download instructions can be found on the card included in the Persistent Pager packaging.*

Step 2: Install Persistent Pager on Strata CS Server

The server installation will install both the Persistent Pager Administrator and the Persistent Pager Monitor. Perform the server installation on the Strata CS Server.

1. Unzip the file PagerServer.zip to a temporary location.
2. Run Setup.exe from the location from which the PagerServer was unzipped.
3. Follow the instructions in the Persistent Pager Setup window.
4. (Optional) Create a desktop shortcut to the Persistent Pager Administrator (PagerAdmin.exe) and the Persistent Pager Monitor (Pager.exe).
5. Start the Strata CS Server.

Step 3: Install Persistent Pager on Client PC (Optional)

The Client installation will install only the Persistent Pager Administrator. It can be installed on any machine networked to the Strata CS Server, and allows remote management of the system to set up agents, schedules, mailboxes and system settings. You do not need to install the PagerClient on the Strata CS Server since the Persistent Pager Administrator has already been installed.

1. Unzip the file PagerClient.zip to a temporary location.
2. Run Setup.exe from the location it Pager Client was unzipped to.
3. Follow the instructions in the Persistent Pager Setup window.
4. (Optional) Create a desktop shortcut to the Persistent Pager Administrator (PagerAdmin.exe).

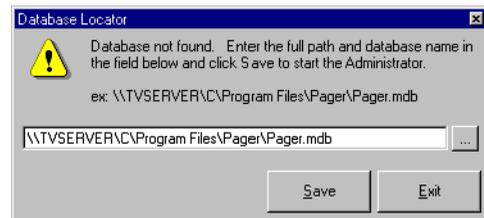
Setup

Once the Persistent Pager has been successfully installed, you are ready to configure the system for use. All setup can be done from the Persistent Pager Administrator.

1. Start the Administrator by clicking on the Persistent Pager Administrator shortcut or by choosing Start > Programs > TeleVantage Persistent Pager > Persistent Pager Administrator.

Note The first time the Persistent Pager Administrator is run on a client machine, the screen at the right displays.

2. Fill in the full path and database name in the field provided, or click the browse button to locate the pager.mdb file on the network.
3. Once the full path and name are listed, click Save. The Persistent Pager Administrator starts.



Step 1: System Configuration

There are several mandatory system and license settings that are set in the Configuration view of the Administrator.

1. Click on the Configuration icon on the left-hand side of the Administrator. The Configuration screen displays (shown at right)

2. Enter the following information:

Note All fields are mandatory. The Persistent Pager will not run if any of these fields have incomplete information.

- Serial Number. The license serial number for the Persistent Pager. You can find the license serial number on the card included in the Persistent Pager packaging.



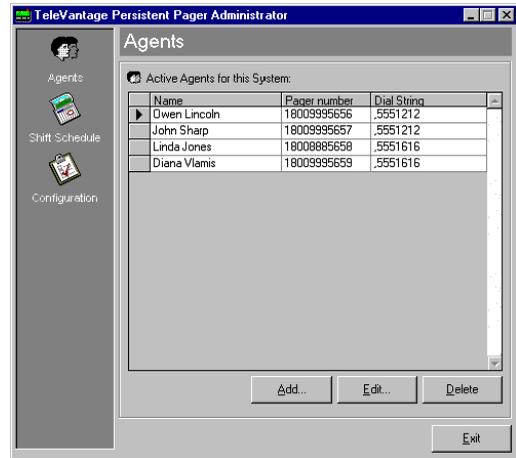
The serial number authorizes you to run one copy of the Persistent Pager.

- Verification Key. The verification key for the Persistent Pager. You can find the verification key on the card included in the Persistent Pager packaging.
 - TeleVantage Server Name. The name of the Strata CS Server.
 - TeleVantage Dialing Service. The access code of a Phone Number dialing service on the Strata CS Server to allow the Persistent Pager to place outbound calls.
 - Poll voice mailboxes for new messages every ____ sec. The number of seconds to wait between polling each mailbox for new or unheard messages.
 - TeleVantage extension assigned to Pager. An extension that will be used internally by the Persistent Pager. This should be an extension that is not already assigned within Strata CS.
3. When all data is entered correctly, click Save.

Step 2: Define Agents

Use the Agents view to create the listing of agents and their associated pager numbers.

1. Start the Administrator by clicking on your Persistent Pager Administrator shortcut or choosing Start > Programs > TeleVantage Persistent Pager> Persistent Pager Administrator.
2. Click on the Agents icon on the left-hand side of the Administrator to access the Agents view (screen shown at right). The Agents view enables you to add, edit, and delete agents.



3. Click Add at the bottom of the screen. The Add Agent screen displays (shown at right)
4. Enter in the following information:

Add Agent

Name: Owen Lincoln

Pager Number: 18009995656

Dial String:5551212

Buttons: OK, Cancel

- Name. A name associated with this pager number. This is a descriptive name only, and does not need to match a Strata CS user name.
- Pager Number. The pager number to call, exactly as it should be dialed. Note: if a second access code is required by Strata CS to dial out, add that access code here. This would be applicable if Strata CS is behind another phone system.
- Dial String. The digits that will be sent to the pager to identify where the page is coming from. This might be the phone number of your business or other identifying digits.

Important! *Embed some pauses into the dial string to allow time for the pager to answer before the dial string is sent. Do this by adding commas at the beginning of the string. Each comma indicates a pause of approximately one second. The addition of five commas is recommended.*

5. Click OK when completed.
6. Repeat this step for as many agents as you wish to add.

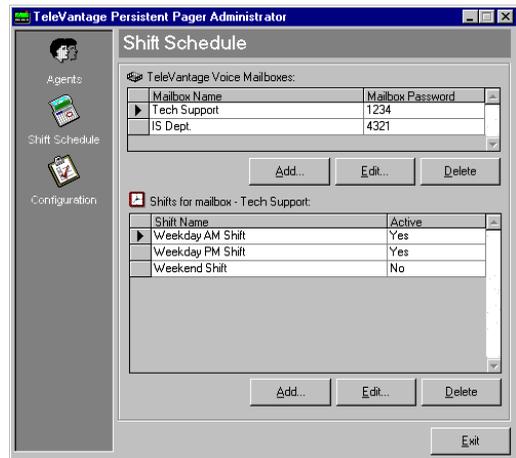
Step 3: Set up Mailboxes and Shifts

The Shift Schedule view enables you to specify mailboxes to monitor and create shifts specifying coverage for each mailbox.

1. Start the Administrator by clicking on your Persistent Pager Administrator shortcut or choosing Start > Programs > TeleVantage Persistent Pager> Persistent Pager Administrator.
2. To access the Shift Schedule view, click on the Shift Schedule icon on the left-hand side of the Administrator.

The Shift Schedule view enables you to specify which mailboxes will be monitored and the shifts associated with each mailbox. Mailboxes and shifts can be added, edited and deleted from this view.

Shifts are assigned to mailboxes. Therefore, you need to add a mailbox before creating any shifts.



Add Mailbox

1. Click Add in the middle of the window. The Edit Mailbox screen displays (shown at right).
2. Enter the following information:
 - Voice Mailbox Name. The name of the mailbox. This must match the user's Strata CS username.
 - Password. The password for this mailbox. This must match the user's Strata CS password.
 - Station (optional). The station port of the mailbox, which is the user's Strata CS station ID. You should fill in this field if the user will be logging on to the Strata CS Client while the Persistent Pager is monitoring their mailbox, otherwise the user's audio output setting might be switched from Telephone to Speakers.
3. Click OK when done.



The screenshot shows a dialog box titled "Edit Mailbox". It has a blue title bar with a close button (X) on the right. The dialog contains three input fields: "Voice Mailbox Name:" with the text "Admin", "Password:" with the text "100", and "Station (optional):" with the text "2". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

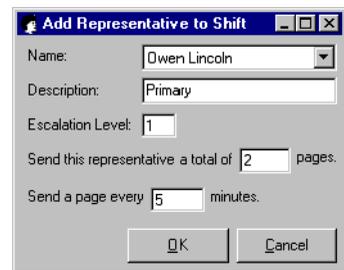
Add Shift

There are two steps to creating a shift:

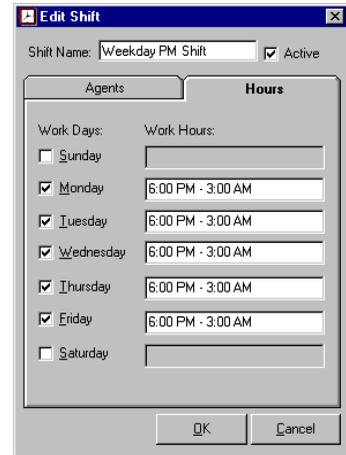
- Adding agents to the shift
 - Defining the days and hours of coverage
1. Select the mailbox you wish to create a shift for, by clicking on the box to the left of the mailbox name. An arrow indicates the mailbox selected.
 2. Click Add at the bottom of the screen to create a new shift. The Edit Shift screen displays (shown right).
 3. Enter a descriptive name for the shift.
 4. Choose whether the shift is active or not active by selecting the Active checkbox. Only Active shifts will be used by the Persistent Pager to send pages to agents. Leave the Active checkbox unchecked to create shifts that will be used at a later time.



- Note** Utilize the Active switch to create shifts that handle weeks of coverage. Create a new shift and leave the Active checkbox unchecked to create shifts that will be used in the future. Or, change the status of an Active shift to in-active by unchecking the Active checkbox to save a shift that will be used again at a later time.
5. Add agents to the shift by selecting the Agents tab and clicking on Add. The Add Representative to Shift screen displays (shown right).
 6. Enter the following agent information:
 - Agent. Select the agent from the listing of agents previously defined in the Persistent Pager.
 - Description. Provide a descriptive name, such as Primary or Secondary.
 - Escalation Level. Enter a number to specify the order of this agent in the escalation list for this shift. An agent with an escalation level of 1 will be paged first, 2 second, etc.



- **Number of Pages.** Enter a number indicating how many times this agent will be paged before moving to the next agent in the escalation list.
 - **Paging Interval.** Enter the number of minutes between pages for this agent. For example, a paging interval set to 5 for an agent with number of pages set to 2 will result in a page being sent every 5 minutes, until 2 pages have been sent.
7. Click OK when completed.
 8. Continue adding agents until all the agents in the shift are listed. Then, specify the hours for this shift by selecting the Hours tab.
 9. Within the Hours view (shown right), specify the days this shift will cover, as well as the hours in each day. The hours for each day need to be entered in the format “HH:MM AM/PM - HH:MM AM/PM”. For example: “9:00 AM - 5:00 PM”. Note that hours from the previous night, such as 6:00 PM - 6:00 AM, will automatically “rollover” to the following day.
 10. Click OK when done creating or modifying the shift.



Note More than one shift can be active at the same time for one mailbox since each shift may cover different hours. However, the Persistent Pager handles only a single active shift for the same hours. If more than one shift is active for the same day and hours, only the first shift found by the Persistent Pager will be used.

Running the Persistent Pager

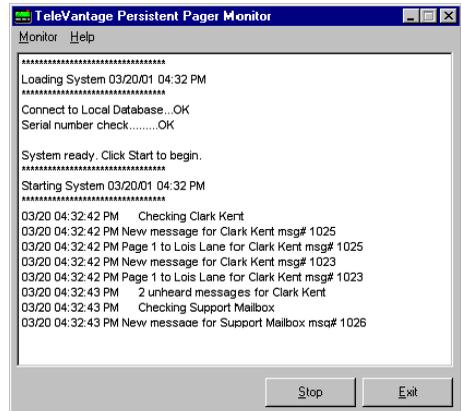
Once your agents, mailboxes and shifts are created, you are ready to run the Persistent Pager.

► To start the Persistent Pager

1. Click on the desktop shortcut or choose Start > Programs > TeleVantage Persistent Pager > Persistent Pager Monitor.

Note As soon as the Monitor is started, several system messages are logged. If there is a problem connecting to the database or with the licensing, it will be noted in the Monitor screen. If the Monitor does not detect any problems, you will see the message “System ready. Click Start to begin”.

2. Click Start or select the Start option from the Monitor pull-down. To stop the application click the Stop button or select the Stop option from the Monitor pull-down.
3. As soon as the Persistent Pager is started, any mailboxes set up in the Administrator will be checked for new messages. Shifts will also be checked to find out what shift is active at this time. If a message is found, a page will be sent to the appropriate agent. The number of the page being sent for a particular message is also displayed so that you can easily see how many pages were sent before a message was heard.
4. All activity of the Persistent Pager will be logged on screen in the Monitor. Use the Monitor to simply view activity of the Persistent Pager or to debug problems with the system. Any errors found will be noted on screen.



► To configure Monitor Settings

1. Select Monitor > Monitor Settings... to access the Monitor Settings window.
2. The Maximum Lines setting defines how many lines of system activity will be displayed in the Monitor. The list box will wrap so that the oldest item will be deleted and the most recent will be added to the bottom. The maximum value of this setting is 1000 since values higher than 1000 can negatively affect system performance. A value of 100 is recommended.
3. To log the activity displayed on screen to a file, select the Enable Logging to File setting. If this option is selected, also specify the file name and path to the log file. The log file will be continually appended to as the Persistent Pager is running.
4. Use the log file option when debugging the application only.
5. Click the Save button when completed.

Note At any point, you can clear the contents of the screen by choosing Monitor > Clear List from the drop-down menu. This will clear the Monitor of all past activity. New activity will be logged as usual.

Debugging

If the Strata CS Persistent Pager is not working as expected, here are some pointers to help you determine the source of the problem.

First, review this installation checklist. Did you remember to install all the necessary components?

- You are using a Strata CS 4.0 Server.
- TeleVantage SDK is installed.
- TeleVantage Persistent Pager server component is installed.

Was the necessary setup of the Persistent Pager completed?

- All Configuration settings in the Persistent Pager Administrator are set, including Strata CS Server name, dialing service and license information.
- At least one mailbox is set up with the correct Login name and password.
- At least one active shift is set up for the mailbox.
- Agent pager numbers are correct.
- Hours of coverage are set appropriately.

If all seems correct with the installation and setup, don't forget to check the following:

- Are any error messages displayed in the Monitor?

If the Persistent Pager detects any errors while running, the errors will be logged to the Monitor screen. This is the best place to check for problems and will likely point you to the source of the problem.

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