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585-236-165

**AT&T Route It!™**  
**Installation**  
**Release 2002.3**  
  
**User's Guide**

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Release 2002.3

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**Notice**

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USADirect is a service mark of AT&T.

ZIP Code is a registered trademark of the United States Postal Service.

**Telephone Support**

For technical support with your AT&T Route It! software, please call 1 800 862-2237 and choose Prompt 7 for Route It! support. Route It! support is available 24 hours a day, 7 days a week, in all of the continental United States and Canada.

**Security Requirements**

To help protect your Route It! data from theft or misuse, please adhere to these security requirements.

Store Route It! passwords and their corresponding user names separately.

When a user having Route It! access leaves your company, or a laptop computer on which Route It! is installed is lost or stolen, please call 1 800 862-2237, *within four hours*, and choose Prompt 7 for Route It! support to have the user name and password reset.

It is your responsibility to perform virus checks on any software files residing on or used on the same PC where Route It! is installed.

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## About This Document

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### Who Should Read This Guide

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Read this guide if you want to install the AT&T Route It!™ software to manage call routing for your AT&T Toll-Free Service.

### Reason For Reissue

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This guide was reissued to document the following changes:

- Update release number to 2002.3

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## **How to Use This Guide**

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Use this guide for detailed instructions on installing and setting up Route It!

**⇒ NOTE:**

Route It! is a product of AT&T Toll-Free Routing Control.

It is assumed that Route It! software installers and users are familiar with the Microsoft Windows 95/98® or Windows NT® environment. For information on using the MS-DOS® operating system or Windows, refer to the user's guides supplied with the software.

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## Conventions Used

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This guide uses different fonts and styles to distinguish different types of information. The conventions used are listed below:

- Text that appears on your screen is shown in bold type, like this: **System Admin**.

Screen text includes prompts, field names, menu items, error messages, or any other information displayed by the program.

- The response the system makes after you enter a command is described on a new line, for example:

From the File menu, choose **Open**.

The Open dialog box appears.

- Screen buttons are shown like this: **OK**.
- Information you type is shown like this: ADMIN.
- The terms *select* and *choose* are used throughout this document to indicate that you should press and release the left mouse button when the pointer is on an item in the software, such as a menu option or list item.
  - The term *select* indicates the selection and highlighting of one or more items in a list. For example: Select a dialed number from the list box.
  - The term *choose* indicates the selection of a menu command or button that results in action being taken in the software. For example: From the File menu, choose **Open**.

For certain functions, you may need to click the right mouse button. The documentation describes when you need to click the right mouse button.

- The document contains reminders that alert you to additional and important information:
  - ☑ **HINT:**  
Provides helpful information, such as an alternate way of choosing a menu command.

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**⇒ NOTE :**

Alerts you to additional information.

**☞ IMPORTANT:**

Informs you that the feature described will be available in a future version of Route It!

**▲ CAUTION:**

*Alerts you to the extra importance of information contained in an explanation or in a procedure.*

**▲ WARNING:**

*Indicates the presence of a hazard that will or can cause equipment damage, loss of software or data, or service interruption if the hazard is not avoided.*

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## **Related Documentation**

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This user's guide is part of a four-document set that also includes:

■ *AT&T Route It! Edit Plans User's Guide*

This guide describes how to use the Edit Plans feature of Route It! to set up and manage call routing for your AT&T Toll-Free Service. It also explains how to change certain call routing in five minutes or less. This guide also describes how to use the new Route It! Mail task.

■ *AT&T Route It! Schedules and Quick Changes User's Guide*

This guide explains how to schedule different aspects of your call-routing plans. For example, it describes how to schedule the use of one or more routing plans by day of week and by time of day. It also explains how to request quick changes to the schedules you create.

■ *AT&T Route It! Administration Guide*

This guide describes how to use the Customer Profile feature of Route It! to view information about provisioned data, such as dialed numbers, terminations, queues, and announcements. In addition, this guide describes how to update plan data using the Refresh function.

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## Finding Route It! Information

Use Table 1 to determine which Route It! guide contains general Route It! information. Use Table 2 to help locate information about a specific Route It! task.

**Table 1. Finding General Information in Route It! Documents**

To Find Information About...	See the <i>AT&amp;T Route It!</i> ...
Route It! hardware and software requirements, installation procedures, setting Route It! user permissions, connecting your PC to the support system	<i>Installation User's Guide.</i>
Route It! administrative features, that is, Customer Profile, Refresh, and System Administration	<i>Administration Guide.</i>
Route It! features and functions, AT&T Toll-Free Calling Services, AT&T Advanced Features, and starting Route It!	<i>Edit Plans User's Guide</i> , Chapter 1, "Overview."
Using Route It! with Windows	<i>Edit Plans User's Guide</i> , Chapter 2, "Using Route It! with Windows."
Possible changes made to your routing plans when a new area code is created for a geographical region	<i>Edit Plans User's Guide</i> , Appendix A, "Managing Area Code Split Updates."
Possible changes made to your terminations and routing plans when a new country code is added for a geographical region.	<i>Edit Plans User's Guide</i> , Appendix B, "Managing Country Code Updates."

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**Table 1. Finding General Information in Route It! Documents**

To Find Information About...	See the <i>AT&amp;T Route It!</i> ...
Validation performed by the support system when a dialed number subscribes to the Redirect or Alternate Destination Routing (ADR) AT&T Advanced Feature	<i>Administration</i> guide, Appendix A, "Advanced Feature Rules."

**Table 2. Finding Specific Task Information in Route It! Documents**

For This Application	To Find Information About...	See the <i>AT&amp;T Route It!</i> ...
User Setup  	Adding, modifying, and removing setup information for Route It! users, and changing user permissions	<i>Installation User's Guide</i> , Chapter 4, "User Setup," and <i>Administration Guide</i> , Chapter 5, "User Setup."

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**Table 2. Finding Specific Task Information in Route It! Documents (Cont'd)**

For This Application	To Find Information About...	See the <i>AT&amp;T Route It!...</i>
 Edit Plans	Changing your password	<i>Edit Plans User's Guide</i> , Chapter 1, "Overview."
	Basic concepts of routing plans and their nodes and branches, Service Dates, Service View, and plan validation	<i>Edit Plans User's Guide</i> , Chapter 3, "Routing Plan Concepts."
	Creating and editing routing plans, working with nodes and branches, overriding the percentages of Allocator node branches in an active schedule in five minutes or less, displaying plan information, displaying node and branch data, saving, deleting, and printing plans, updating plan data, and getting plans validated in preparation for use in routing calls	<i>Edit Plans User's Guide</i> , Chapter 4, "Creating or Editing a Plan."
	Creating, modifying, printing, and deleting labels for values or names in branch and node fields	<i>Edit Plans User's Guide</i> , Chapter 5, "Labels."
 Inquiries	Searching for Dialed Number and Terminating Routing Number information.	<i>Administration Guide</i> , Chapter 6, "Searching."
	Requesting System Limits	<i>Administration Guide</i> , Chapter 6, "System Limits."

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**Table 2. Finding Specific Task Information in Route It! Documents (Cont'd)**

For This Application	To Find Information About...	See the <i>AT&amp;T Route It!...</i>
<p>CRP Tables</p>  <p>CRP Tables</p>	<p>Creating and editing CRP tables, creating and editing future changes to CRP tables, assigning CRP databases to tables, and getting information on CRP tables and terminations and announcements (currently available only in the United States)</p>	<p><i>Edit Plans User's Guide</i>, Chapter 6, "CRP Tables."</p>
<p>Mail</p>  <p>Mail</p>	<p>Opening, sorting, printing, and deleting Route It! mail messages</p>	<p><i>Edit Plans User's Guide</i>, Chapter 8, "Displaying Mail Messages".</p>
<p>Scheduler</p>  <p>Scheduler</p>	<p>Features common to each schedule type, an overview of working with schedules and making quick changes</p>	<p><i>Schedules and Quick Changes User's Guide</i>, Chapter 1, "Scheduler Basics."</p>
	<p>Creating, editing, saving, and printing plan schedules, sending schedules to the support system, and changing the Service View</p>	<p><i>Schedules and Quick Changes User's Guide</i>, Chapter 2, "Scheduling Plans."</p>
	<p>Specifying the MCA (maximum calls allowed) at a given ATS (Alternate Termination Sequence)-type termination, specifying the MCQ (maximum calls in queue)</p>	<p><i>Schedules and Quick Changes User's Guide</i>, Chapter 3, "Scheduling MCA and MCQ Values."</p>

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**Table 2. Finding Specific Task Information in Route It! Documents (Cont'd)**

For This Application	To Find Information About...	See the <i>AT&amp;T Route It!...</i>
 Quick Changes	Overriding the values in an active schedule in either 5 or 15 minutes, resuming original schedule values, changing the query status of a CRP table in 5 minutes, and changing the Service View	<i>Schedules and Quick Changes User's Guide</i> , Chapter 4, "Quick Changes."
 Comm Log	Displaying, printing, and saving messages in the Comm Log and customizing the look of the Comm Log	<i>Edit Plans User's Guide</i> , Chapter 7, "Comm Log."
 Customer Profile	Your provisioned data, using Customer Profile to rename data items, add customer remarks, changing the service area of a termination, or changing the timeout treatment for a queue	<i>Administration Guide</i> , Chapter 2, "Customer Profile."
	Rules for changing the service area of an access line	<i>Administration Guide</i> , Chapter 2, "Customer Profile," and Appendix B, "Service Area Rules."

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**Table 2. Finding Specific Task Information in Route It! Documents (Cont'd)**

For This Application	To Find Information About...	See the <i>AT&amp;T Route It!...</i>
 Refresh	Updating general AT&T information and detailed account-specific data, comparing the Route It! Service Dates with the support system Service Dates, requesting a list of transactions for a specific account	<i>Administration Guide</i> , Chapter 3, "Refresh."
 System Admin	Disconnecting your PC from the support system, backing up and restoring your Route It! database, entering or changing selections for automatic Refresh, support system message polling, scheduled Refresh, purging Comm Log messages, installing Route It! patches, removal of account data, and SMW (Service Management Workstation) ID	<i>Administration Guide</i> , Chapter 4, "System Administration."
	Setting Route It! user permissions, adding and modifying Route It! users, and removing Route It! user access	<i>Administration Guide</i> , Chapter 5, "User Setup."

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### **How to Order Documentation**

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The order number for this document is 585-236-165. To order an additional copy of this document contact your AT&T account representative.

### **Reading User Guides Online**

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All the AT&T Route It! documentation is available on the same CD-ROM that contains the installation programs. Online guides give you the advantages of electronic searching, bookmarking, and linking that quickly get you the information you need.

When you locate information you need, you can print the pages or view them along with the AT&T Route It! application you are using. (The easiest way is to use **Alt + Tab** to move between the book and the application.)

To prepare to read the user guides online, do the following:

1. Install Adobe Acrobat Reader.
2. Using Windows 95/98, copy the user guides you want to use from the CD-ROM to a directory on your hard drive.

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## **Installing Adobe Acrobat Reader for Windows 95/98**

Using Windows 95/98, you must install the 32-bit version of the Acrobat Reader software. (This can also be done with Windows NT.)

### **⇒ NOTE :**

If you have version 3.0x of Acrobat Reader on your system, you must uninstall Acrobat 3.0x, restart your computer, and then proceed with the following steps to install Acrobat 4.0.

To install Adobe Acrobat Reader, do the following:

1. Open Windows Explorer and change drives to the CD-ROM drive.
2. Locate the Acroread folder and double-click the folder to open it.

The installation executable, ar40eng.exe, is listed.

3. Double-click the installation executable, ar40eng.exe.

A confirmation message box appears asking if you wish to continue with the installation of Acrobat Reader 4.0.

4. Respond to the confirmation message.

- If you choose **Yes**, the program installs the Acrobat Reader.
- If you choose **No**, you cancel the installation.

The InstallShield program starts and displays a license agreement. Adobe freely distributes the Acrobat Reader; however, the company does request that you review and accept the license agreement prior to installing.

5. Review the license agreement and choose **Yes** to continue.

The Choose Destination Location dialog box appears.

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6. Choose the destination directory for the installation, or accept the default path, then choose **Next** to continue.

When you receive a message that the installation is complete, you are ready to select the user guides you want to use and copy them to your hard drive. For more information, refer to the next section, "Selecting and Copying User Guides."

## **Selecting and Copying User Guides**

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All the AT&T Route It! user guides are available on the same CD-ROM that contains the Route It! 2001.1 installation software. Copy the books you want to use and leave the rest on the CD-ROM; you can always copy additional books whenever you please.

To select and copy the user guides, do the following:

1. Use the Windows Explorer for Windows 95/98 and change drives to the CD-ROM drive.

2. Locate the PDF Docs folder and double-click the folder to open it.

The PDF Docs folder expands.

3. Highlight the book titles you want to copy and choose **Copy** from the Edit menu.

Use the following information to help you select the user guide titles you want:

**Administration.pdf** *Route It! Administration User's Guide*

**Edit Plan.pdf** *Route It! Edit Plans User's Guide*

**Installation.pdf** *Route It! Installation User's Guide*

**Schedules & Quick Changes.pdf** *Route It! Schedules and Quick Changes User's Guide*

4. After you select the books you want to copy, change drives (using Windows Explorer) to point at the hard drive. Choose a destination directory, or create one for the books you are about to copy.

5. Double-click the destination directory (folder) to open it.

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6. From the Edit menu, choose **Paste**.

The user guides you selected are copied to the destination directory you selected.

## **Viewing the User Guides with Adobe Acrobat Reader**

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After you have installed the Acrobat Reader software appropriate for your environment and you have copied your user guide selections from the CD-ROM, you are ready to view the documentation online.

1. Use the Windows Explorer and locate the directory where you copied the user guides.
2. Double-click the name of a user guide you wish to view.

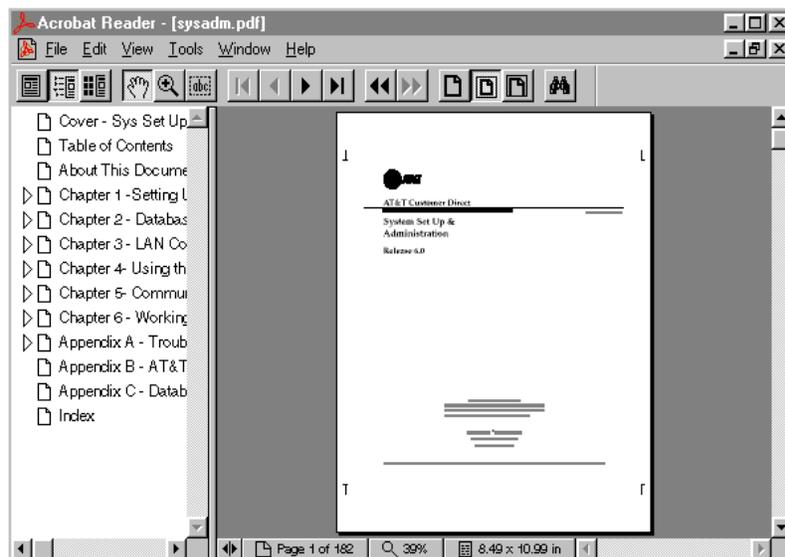
The .PDF extension is an extension that is associated with Adobe Acrobat. Double-clicking a document with this extension should automatically start the Acrobat Reader.

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## About This Document

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If double-clicking the \*.PDF document does not start the Acrobat Reader automatically, you can open the directory where you installed the Acrobat Reader and start the Reader manually. After the Reader is open, choose **Open** from the File menu to open the document you want to view.



If you choose the **Bookmarks** button, you can split the screen so that you can view the book structure on the left and the pages of the book on the right. For tips and techniques for using the Acrobat Reader features, choose **Reader On-Line Guide** from the Help menu.

## Getting Online Help

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Online help is available on every window through the Help menu. It is also available on every dialog box through the **Help** button.

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# Hardware and Software Requirements

# 1

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## Hardware and Software Requirements

# 1

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This chapter describes the hardware and software requirements for installing the AT&T Route It! on a single PC or a local area network (LAN) setup.

⇒ **NOTE 1:**

Route It! requires a POTS/plain analog line to dial up the AT&T Host Support System. While some users are running successfully via a PBX connection, we cannot guarantee that Route It! will run effectively via a PBX connection, as PBXs can degrade the line quality when they convert from digital to analog.

⇒ **NOTE 2:**

Route It! runs best on a dedicated PC with only Route It! loaded, as it is a powerful application. If needed, word processor software can be loaded on the same PC. However, no proxy software can be on this PC. Internet software or any other software that dials out can interfere with the connection between Route It! and the Host Support System and should only be installed if Route It! requires a dial-up software.

### Single PC Setup Requirements

To run Route It! on a single PC, you need the following hardware and software:

- An IBM-compatible personal computer. The PC should have the following:
  - **Small Single User:** Pentium II central processing unit (CPU) with a minimum of 350 megahertz (MHz), 64 megabytes (MB) of random access memory (RAM), 500 MB of free disk space is recommended

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- **Large Single User:** Pentium III 450 MHz CPU (or better for large accounts), 128 MB of random access memory (RAM), 500 MB of free disk space is recommended

⇒ **NOTE :**

This note **ONLY** applies to Windows 95/98 Installations. To help prevent reduced performance, minimize or avoid running other applications and utilities while Route It! is running and do not use more than one Route It! task at a time.

- CD-ROM drive
  - Mouse or pointing device
  - Monitor with a minimum of Video Graphics Array (VGA) resolution
  - Microsoft Windows 95/98, Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5), or Windows 2000 Professional (with Service Pack 1) compatible modem that runs at 28.8 kilobits per second (Kbps) or faster
  - Microsoft Windows 95/98/NT/Windows 2000 supported printers (excluding Dot Matrix printers)
- Microsoft Windows 95/98, Microsoft Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5), or Windows 2000 Professional (with Service Pack 1) with the following:
- Microsoft Transmission Control Protocol/Internet Protocol (TCP/IP)
  - Dial-Up Networking Installed

⇒ **NOTE :**

Dial-Up Adapter is installed automatically when you install Dial-Up Networking. (Windows 95/98 only.)

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## **LAN Setup Requirements**

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To run Route It! on a LAN, one dedicated PC must be designated as the *Database/Communications Server*. All other PCs in the LAN environment are considered *clients*. Route It! will run in the following supported LAN environment:

- Microsoft Windows NT 4.0 server (with Service Pack 4 or Service Pack 5) or Microsoft Windows 2000 server (with Service Pack 1) using TCP/IP

## **LAN Database/Communications Server Requirements**

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To run Route It! as a database/communications server, you need the following hardware and software:

- An IBM-compatible personal computer. The PC should have the following:
  - Pentium III CPU with 450 MHz
  - 128 MB of RAM
  - 500 MB of free disk space is recommended
  - CD-ROM drive
  - Mouse or pointing device
  - Monitor with a minimum of VGA resolution
  - Hayes-compatible modem that runs at 28.8 Kbps or faster
  - Microsoft Windows 95/98/NT/2000 supported printers (excluding Dot Matrix printers)
- Microsoft Windows NT server 4.0 (with Service Pack 4 or Service Pack 5) or Microsoft Windows 2000 server (with Service Pack 1) with the following:
  - Microsoft TCP/IP
  - Dial-Up Networking Installed

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### **LAN Client Requirements**

---

To run Route It! on a LAN client PC, you need the following hardware and software:

- An IBM-compatible personal computer. The PC should have the following:
  - Pentium II CPU with 266 MHz (or better for large accounts)
  - 64 MB of RAM
  - 250 MB of free disk space is recommended
  - CD-ROM drive
  - Mouse or pointing device
  - Monitor with a minimum of VGA resolution
  - Microsoft Windows 95/98/NT/2000 supported printers (excluding Dot Matrix printers)
- Microsoft Windows 95/98, Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5), Windows 2000 (with Service Pack 1) with Microsoft TCP/IP installed

### **Before You Install Route It!**

---

At the time you install Route It!, you will be prompted for logon and configuration information specific to your installation.

### **Installing Route It! on a Windows NT PC**

---

If you are loading and/or upgrading Route It! on a Windows NT PC, you **MUST** be logged into the PC as the Administrator. This requirement **only** applies to loading and/or upgrading Route It! Any login will allow you to use Route It! Also, if you are using Dial-Up Networking, you must install Service Pack 4 or Service Pack 5 after you have installed the Dial-Up Networking.

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### Support System Logon Information

---

You will be prompted for the following logon information required by the support system:

**Service Maintenance Workstation (SMW) ID** An identifier used by the support system to identify a Route It! PC.

**Point-to-Point Protocol (PPP) Login and Password** Provides communications access to the support system.

Each single PC (non-LAN) installation of Route It! requires a unique SMW and a unique point-to-point login and password. For example, if you have two stand-alone Route It! PCs, you need two sets of support system logon information, one set for each PC. You do not need to provide this information for existing Route It! PCs that you are updating.

In a LAN environment, only the database/communications server requires the support system logon information. You do not need to provide this information for LAN client PCs. In addition, you do not need to provide this information for an existing database/communications server that you are updating with Route It!

An AT&T representative will contact you to give you logon information. Table 1-1 shows the information you will be given and provides space for you to record it.

**Table 1-1. Logon Information Record**

	<b>IDs, Login, Password</b>	<b>PC Name or Address</b>
Service Maintenance Workstation (SMW) ID:		
Point-to-Point Protocol (PPP) Login:		
Password:		

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**IP Address of the Database/Communications Server**

If installing Route It! in a LAN environment, you will also need to provide the Internet Protocol (IP) address for the database/communications server. Use Table 1-2 to record the IP address.

**Table 1-2. Database/Communications Server IP Address**

Database/Communications Server	IP Address:	
--------------------------------	-------------	--

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# Setting Up Route It! on a Single PC

# 2

---

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## Setting Up Route It! on a Single PC

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## Setting Up Route It! on a Single PC

# 2

---

This chapter explains how to install the stand-alone computer version of AT&T Route It! software.

### Setting Up Route It! on a Single PC

To install Route It! on a single PC for the first time, you must install the following software in the following order:

- (1) Microsoft Windows 95/98 or Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5)
- (2) The following Windows-based components:
  - TCP/IP
  - Dial-Up Networking (must also install Service Pack 4 or Service Pack 5 for Windows NT)
  - Dial-Up Adapter (Windows 95/98) only
- (3) Route It! Release 2002.3

If you are updating an existing Route It! PC, you only need to install Route It! Release 2002.3. For installation instructions, see the section “Installing Route It!,” later in this chapter.

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## **Installing Windows-Based Components**

---

You need to install the following Windows-based components, if they are not already installed:

- TCP/IP
- Dial-Up Networking (must also install Service Pack 4 or Service Pack 5 for Windows NT)
- Dial-Up Adapter (Windows 95/98 only)

Both Windows 95/98 and Windows NT PCs require the first two Windows-based components.

### **Installing Windows-Based Components in Windows 95/98**

---

#### **Installing TCP/IP in Windows 95/98**

This section explains how to check for the TCP/IP component and how to install it, if it is not already installed.

To see if TCP/IP is installed on your PC, follow these steps:

1. On the Windows 95/98 taskbar, click **Start**.
2. Point to **Settings**, then click **Control Panel**.  
The Control Panel window appears.
3. In the Control Panel window, double-click the Network icon.  
The Network dialog box appears.
4. At the Network dialog box, select the **Configuration** tab.  
**TCP/IP** appears in the list box if TCP/IP is already installed.  
If TCP/IP is *not* installed, complete the following procedure.

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To install TCP/IP, follow these steps:

1. Display the Network dialog box, as described in the previous procedure.
2. At the Network dialog box, select the **Configuration** tab.
3. On the **Configuration** tab, choose **Add**.

The Select Network Component Type dialog box appears.

4. Select **Protocol** from the list box, then click the **Add** button.

The Select Network Protocol dialog box appears.

5. At the Select Network Protocol dialog box, do the following:
  - a. Under **Manufacturers**, select **Microsoft**.
  - b. Under **Network Protocols**, select **TCP/IP**.
  - c. Choose **OK**.

You are returned to the Network dialog box.

6. On the Network dialog box, click **OK**.

A message appears indicating that you must restart your PC.

7. Choose **Yes** to restart your PC.

### Installing Dial-Up Networking in Windows 95/98

This section describes how to check for Dial-Up Networking and how to install it, if it is not already installed. If Dial-Up Networking is already installed on your PC, you can go to the previous section, "Installing TCP/IP in Windows 95/98."

To check for and install Dial-Up Networking on your PC, follow these steps:

1. On the Windows 95/98 taskbar, click **Start**.
2. Point to **Settings**, then click **Control Panel**.

The Control Panel window appears.

3. In the Control Panel window, double-click the Add/Remove Programs icon.

The Add/Remove Programs Properties dialog box appears.

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4. Select the **Windows Setup** tab.
5. In the **Components** list of the tab, select **Communications**, then select the **Details** button.

The Communications dialog box appears.

6. At the Communications dialog box, do *one* of the following:
  - If the **Dial-Up Networking** check box is selected, the Dial-Up Networking component is already installed on your PC.

To exit the Add/Remove Programs Properties dialog box, click **OK** on the Communications dialog box and on the **Windows Setup** tab.

- If the **Dial-Up Networking** check box is *not* selected, do the following:
  - a. Select the **Dial-Up Networking** check box, then choose **OK**.

You are returned to the **Windows Setup** tab.

- b. Click **OK** on the **Windows Setup** tab.

The Dial-Up Networking component installs. A message appears indicating that your system settings are reconfigured.

- c. Click **OK** at the message.

You are returned to the Control Panel window.

7. In the Control Panel window, double-click the Network icon.

The Network dialog box appears.

8. Select the **Identification** tab.
9. Type entries for the following text boxes on the **Identification** tab:

⇒ **NOTE :**

Route It! does not require specific information in these text boxes. It only requires that entries are made for each text box.

- **Computer name**
- **Workgroup**
- **Computer Description**

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10. Click **OK**.

A message appears indicating that you must restart your PC.

11. Choose **Yes** to restart your PC.

## **Installing Windows-Based Components in Windows NT**

### **Installing Dial-Up Networking in Windows NT Workstation 4.0**

This section describes how to check for Dial-Up Networking and how to install it, if it is not already installed. If Dial-Up Networking is already installed on your PC, you can go to the following section, "Installing TCP/IP in Windows NT Workstation 4.0."

#### **⇒ NOTE :**

After Dial-Up Networking is installed, you must install Service Pack 4 or Service Pack 5 for Windows NT installations.

To check for and install Dial-Up Networking on your PC, follow these steps:

1. Double-click the My Computer icon.
2. Double-click the Dial-Up Networking icon.

The Dial-Up Networking window appears.

- If **Phonebook entry to Dial** appears, Dial-Up Networking is already installed on your PC.

Click on **Close** and proceed to the next section, "Installing TCP/IP in Windows NT Workstation 4.0."

- If Dial-Up Networking is *not* installed on your PC, the Dial-Up Networking Install window appears.

3. On the Dial-Up Networking Install window, click **Install**.

The Files Needed dialog box appears.

4. Insert the Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5) CD-ROM into the CD-ROM drive.

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5. At the Files Needed dialog box, enter x:i386 in the **Copy Files From** text box, where x is the letter that corresponds to the CD-ROM drive.
6. Click **OK**.

The installation process copies the necessary files to your hard drive.

The Add RAS Device dialog box appears, listing the modem that is installed on your PC.
7. Click **OK**.

The Remote Access Setup dialog box appears.
8. At the Remote Access Setup dialog box, click **Continue**.

The system performs the final configurations for Dial-Up Networking.

The Dial-Up Networking dialog box appears, stating that Dial-Up Networking has been successfully installed.

A message appears indicating that you must restart your PC.
9. Click **Restart**.

#### **Installing TCP/IP in Windows NT Workstation 4.0**

This section explains how to check for the TCP/IP component and how to install it, if it is not already installed. To see if TCP/IP is installed on your PC, follow these steps:

1. On the Windows NT taskbar, click **Start**.
2. Point to **Settings**, then click the Control Panel icon.

The Control Panel window appears.
3. In the Control Panel window, double-click the Network icon.

The Network dialog box appears.
4. At the Network dialog box, click on the **Protocols** tab.
  - If **TCP/IP Protocol** appears in the list, TCP/IP is already installed on your PC.

Click **Cancel** and proceed to the next section, "Installing AT&T Route It! Software."

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- If **TCP/IP Protocol** does *not* appear, proceed to Step 5.
- 5. On the **Protocols** tab, click **Add**.  
The Select Network Protocol dialog box appears.
- 6. Select **TCP/IP Protocol** and click **OK**.  
The TCP/IP Setup dialog box appears, stating the following warning:  
**If there is a Dynamic Host Configuration Protocol (DHCP) server on your network, TCP/IP can be configured to dynamically provide an IP address. If you are not sure, ask your system administrator. Do you wish to use DHCP?**
- 7. Click **Yes**.  
The Files Needed dialog box appears.
- 8. Insert the Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5) CD-ROM into the CD-ROM drive.
- 9. At the Files Needed dialog box, enter x:i386 in the **Copy Files From** text box, where x is the letter that corresponds to the CD-ROM drive.
- 10. Click **Continue**.  
The installation process copies the necessary files to your hard drive. The Setup dialog box appears, stating the following warning:  
**Setup has discovered that you have Remote Access Services installed. Do you want to configure RAS to support the TCP/IP protocol?**
- 11. Click **OK**.  
The Remote Access Setup dialog box appears.
- 12. At the Remote Access Setup dialog box, click **Continue**.  
The Network dialog box appears.

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13. At the Network dialog box, click **Close**.

A message appears indicating that you must restart your PC.

14. Click **Yes** to restart your PC.

## **Installing Route It!**

---

To install Route It! software on a single PC, follow these steps:

### **⇒ NOTE :**

If you are installing or upgrading Route It! on a Windows NT PC, you **MUST** be logged on the PC with a user name that has permissions for administrative privileges. Before proceeding with any of the procedures given below, verify that your user name has the correct administrative permissions. Once you have verified this, enter your user name at the PC login prompt. This requirement **only** applies to installing or upgrading Route It! Any Windows NT user name will allow you to use Route It!

1. Make sure no other applications are running. Check the Windows 95/98/NT taskbar, and close all other applications.
2. Insert the CD-ROM into the appropriate drive.
3. From the Windows 95/98/NT taskbar:
  - Click the **Start** button
  - Point to **Settings**
  - Click **Control Panel**.

The Control Panel window appears.

4. In the Control Panel window, double-click the Add/Remove Programs icon.  
The Add/Remove Programs Properties dialog box appears.

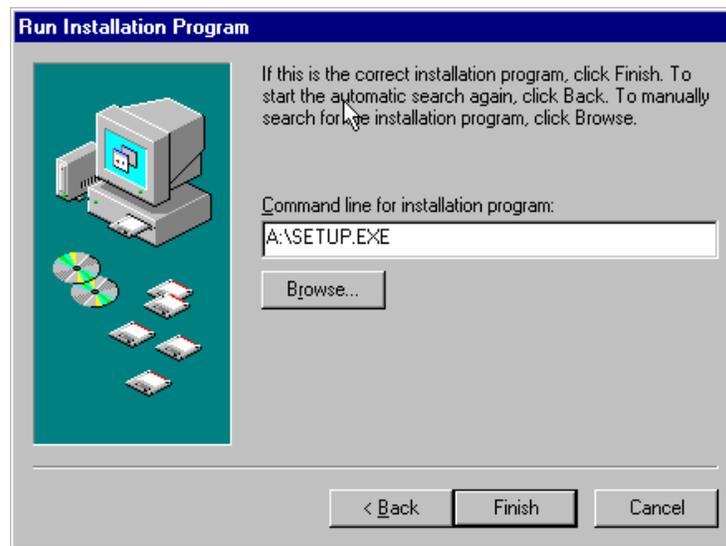
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5. On the **Install/Uninstall** tab, choose **Install**.

The Install Program From CD-ROM dialog box appears.

6. At the Install Program From CD-ROM dialog box, choose **Next**.

Windows 95/98/NT checks the available drives for the presence of installation media, and the Run Installation Program dialog box appears.



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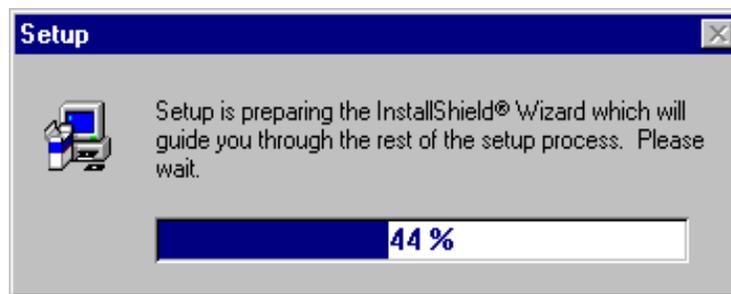
**Figure 2-1. Run Installation Program Dialog Box**

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7. At the Run Installation Program dialog box, do one of the following:
  - Use the **Back** button to start the automatic search again for the installation program.
  - Use the **Browse** button to manually search for the installation program.
  - Choose **Finish**, if this is the correct installation program.

⇒ **NOTE :**

The Route It! Setup window appears indicating that Setup is preparing the InstallShield Wizard which guides you through the rest of the setup process.



---

**Figure 2-2. Setup Box**

*The Welcome dialog box appears.*

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8. At the Welcome dialog box, choose **Next**.
  9. The Installation program checks for the presence of a previous release of AT&T Route It! A pop-up window appears on your screen indicating that Setup is searching for a previous installation of Route It!
    - If detected, the message box shown below appears.  
Select **Yes** if you wish to continue.  
Select **No** if you wish to exit the installation process.
- 



---

**Figure 2-3. Previous Installation Message Box**

10. Click **Yes** to continue.

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- After clicking **Yes**, the Choose Destination Location dialog box for a previous installation appears. (**No** terminates the installation)

Keep the preset destination directory by choosing **Next**.

*Or*

Choose **Browse** to select a different directory, then choose **Next**.

⇒ **NOTE :**

It is highly recommended that you use the preset destination directory that Route It! Setup creates.

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- If the Installation program does *not* detect a previous release, the Choose Destination Location dialog box appears.

Keep the preset destination directory by choosing **Next**.

Or

Choose **Browse** to select a different directory, then choose **Next**.

⇒ **NOTE :**

It is highly recommended that you use the preset destination directory that Route It! Setup creates.

---



---

**Figure 2-4. Choose Destination Location Dialog Box**

11. A window appears indicating that the program is checking for disk space.

Click **OK**.

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The Installation Type dialog box appears. Route It! can be installed as a standalone PC installation or on a LAN using a Microsoft Windows NT 4.0 (with Service Pack 4 or Service Pack 5) server with TCP/IP. The selections available from the dialog box include:

- Standalone PC (Default)
- LAN Database/Communication Server
- LAN Client.

If this is a previous installation or upgrade, information available from the database from the previous installation is prepopulated when the following window is presented.

**12. Select the Installation Type.**

---



**Figure 2-5. Installation Type Dialog Box**

---

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13. After verifying that the Standalone PC is selected, click **Next**.

*The “What’s New” Setup windows will appear.*

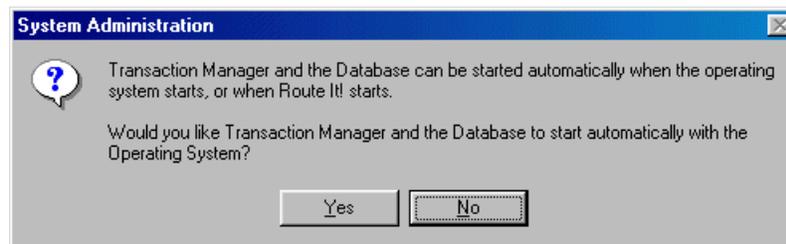
⇒ **NOTE :**

After the system files are successfully copied, several windows appear in succession. These windows are intended to communicate the following information:

- Connecting to database Server...
- Creating Route It! database...
- Connecting to Route It! database
- Building Route It! database...
- If this is a reinstall, go to Step 20.

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14. At the Transaction Manager and Database Startup dialog box, do *one* of the following:
- To have the Transaction Manager and Database automatically start each time the operating system starts, choose **Yes**.
  - To have the Transaction Manager and Database automatically start each time you start Route It!, choose **No**.



---

**Figure 2-6. Transaction Manager and Database Startup Dialog Box**

15. At the end of installation, the Route It! Setup program creates the database, if it does not already exist.
- If the database does exist, then the Installation is Complete window appears. Proceed to Step 20.  
The database will be updated for this release.
  - If the database does *not* exist, it is created (as indicated by the “Building Database” window).  
The System Administration message box appears. Proceed to Step 16.

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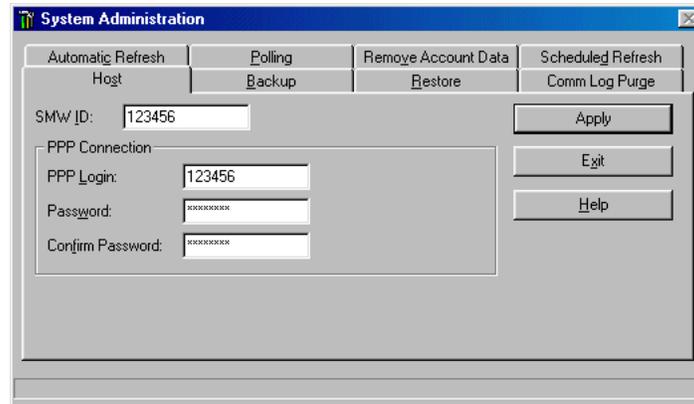
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**Figure 2-7. System Administration Message Box**

**16.** At the System Administration message box, choose **OK**.

The System Administration window appears, with the **Host** tab selected.

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**Figure 2-8. System Administration Host Tab**

17. On the **Host** tab, type your ID and logon information in the appropriate text boxes, choose **Apply**, then choose **Exit**.

⇒ **NOTE 1:**

Exit only exits the System Administration window. It does not exit Route It!

⇒ **NOTE 2:**

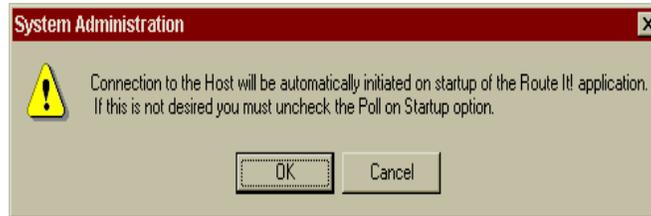
You **MUST** enter the following information:

- SMW ID
- PPP Login
- Password
- Confirm Password.

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The System Administration Connection to Host dialog box appears.

---



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**Figure 2-9. System Administration Connection to Host Dialog Box**

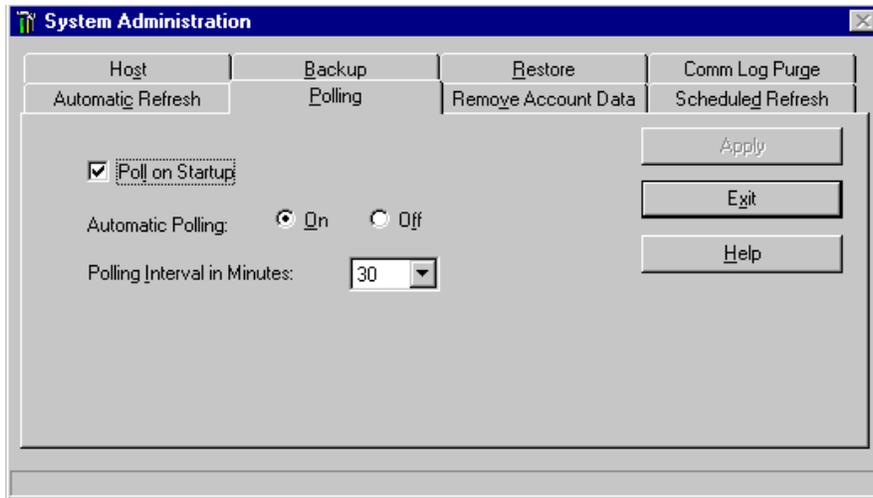
**18.** At the System Administration Connection to the Host dialog box, do *one* of the following:

- To complete the installation, choose **OK**. Proceed to Step 20.
- To prevent connection to the support system each time Route It! starts, choose **Cancel**.

The System Administration window appears, with the **Polling** tab selected. Proceed to Step 19.

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19. At the System Administration window **Polling** tab, clear the **Poll on Startup** check box, choose **Apply**, then choose **Exit**.



**Figure 2-10. System Administration Polling Tab**

⇒ **NOTE 1:**

To learn more about the System Administration window **Polling** tab, see the section “Selecting Automatic or Manual Polling” in Chapter 4, “System Administration,” of the *AT&T Route It! Administration* guide.

⇒ **NOTE 2:**

The AT&T Route It! window is created.

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**Figure 2-11. AT&T Route It! Installation Complete Window**

A message appears, stating that the installation for AT&T Route It! 2002.3 is complete.

**20.** Choose **OK**.

**21.** If system files need to be updated, Windows must be restarted to complete the installation. The Restart Windows window gives you the option to restart the computer now or later.

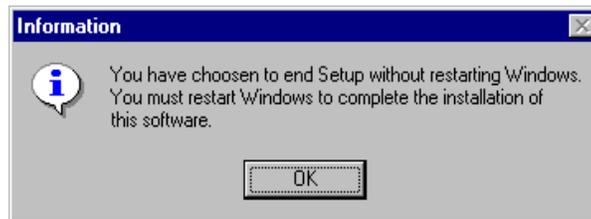
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**Figure 2-12. Restart Windows**

- To restart the computer later, choose **No** and then choose **OK**.
  - Choose **OK**. Remember that you must later restart Windows to complete the installation of the software.
- 



---

**Figure 2-13. End Setup Dialog Box**

- To restart the computer now, choose **Yes** and then choose **OK**. Before restarting the computer, you should close any open applications, including MS-DOS sessions.

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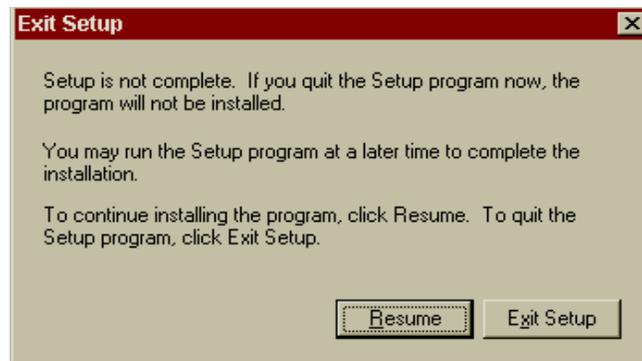
22. If this installation is an upgrade from a previous release, a reinstallation of the current release, or a new installation, you should perform a Refresh of detailed information. This is especially important for dialed numbers, since a Refresh sets the payphone blocking indicator to the correct value for each account. (For more information, see Chapter 3, “Refresh,” in the *AT&T Route It! Administration* guide.)

⇒ **NOTE 1:**

If you quit the Install process before it is complete, the “Route It! Setup Exit” message is displayed.

⇒ **NOTE 2:**

Click **Resume** to continue installing the program or click **Exit Setup** to quit the Setup program and exit Route It!



---

**Figure 2-14. Exit Setup Dialog Box**

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## **Starting AT&T Route It!**

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To start AT&T Route It!, follow these steps:

1. On the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button,
  - (b) Point to **Programs**
  - (c) Point to **AT&T Routing Manager**
  - (d) Click **Route It!**

**OR**

- Double-click on the "Route It!" shortcut icon in AT&T Route It! folder on Programs Menu.
  - If you just installed AT&T Route It! for the first time, proceed to Step 2.
  - If you already had a previous version of AT&T Route It! installed, then the Welcome to AT&T Route It! User Login dialog box appears. Type your user name and password in the appropriate text boxes, then choose **OK**. Your previous login and password are still valid and will be transferred to the new release of software. Proceed to Step 4.
2. At the User Login dialog box, follow these steps:
    - a. In the **User Name** text box, type ADMIN.
    - b. In the **Password** text box, type ADMIN.
    - c. Choose **OK**.

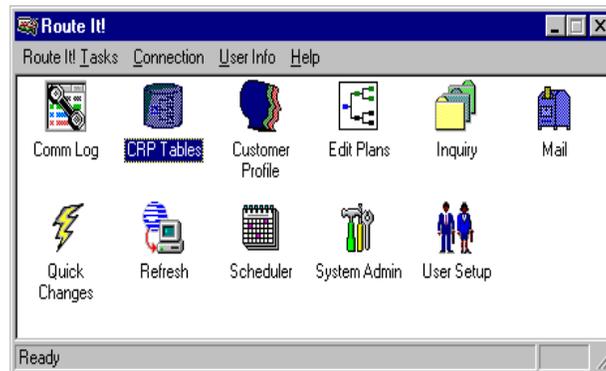
You are prompted to change the administration password.

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3. To change the administration password, do the following:
  - a. Type ADMIN in the **Old Password** field.
  - b. Enter a new password in the **New Password** field, using from one to eight alphanumeric characters.
  - c. Enter the new password again in the **Confirm Password** field and choose **OK**.

The AT&T Route It! main window appears.

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**Figure 2-15. AT&T Route It! Main Window**

4. Select the appropriate icon from the Route It! main window that corresponds to the task you want to perform.

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## Removing Route It! Software

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Before removing Route It! software, remember that all Route It! files will be removed including:

- Route It! program files
- Route It! database files
- Dial-up networking entry
- Registry entries.

There are two ways to remove the Route It! application from your PC.

- Click on the **Uninstall** icon and verify the removal of the application
- Use the **Add/Remove Programs**.

Both methods are given in the following steps.

To delete Route It! using the Uninstall icon, follow these steps:

1. Exit Route It!
2. On the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button
  - (b) Point to **Programs**
  - (c) Point to **AT&T Routing Manager**.
  - (d) Double-click the **Uninstall Route It!** icon

The Confirm File Deletion dialog box appears to confirm your selection to remove Route It!

3. To remove Route It!, choose **Yes**.

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**OR**

To remove Route It! using the Add/Remove Programs, follow these steps:

1. Exit Route It!
2. On the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button
  - (b) Point to **Settings**
  - (c) Click **Control Panel**.

The Control Panel window appears.

3. In the Control Panel window, double-click the **Add/Remove Programs** icon.

The Add/Remove Programs Properties dialog box appears.

4. Select **AT&T Route It!** from the list box and choose **Add/Remove**.

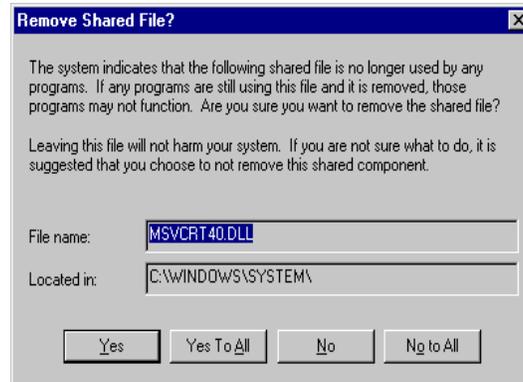
The Confirm File Deletion dialog box appears to confirm your selection to remove Route It!

5. To remove Route It!, choose **Yes**.

**⇒ NOTE :**

If a warning message appears asking if shared files should be removed, it is recommended that you choose **No to All**. If shared files are removed, other applications may be disrupted.

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**Figure 2-16. Shared File Warning Message Box**

6. When the uninstall is complete, choose **OK**.  
Route It! is removed from your PC.

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## **Troubleshooting the Installation Process**

Table 2-1 shows error and warning messages (in bold type) that appear for common installation problems and the actions (in nonbold type) you should take to remedy the problems.

**Table 2-1. Installation Error and Warning Messages**

<b>Error Message and Corrective Action</b>
<p><b>Route It! Setup has failed.</b>  <b>Route It! is currently running on this machine.</b>                      Please exit Route It! before installation.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! Transaction Manager is currently running on this machine.</b>                      Please close Route It! Transaction Manager before installation.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! and/or SQLBase is currently running on this machine.</b>                      Please exit these applications before installation.</p>
<p><b>Route It! Setup has failed.</b>  <b>This version of Route It! requires Windows 95/98 or Windows NT.</b>                      Check to make sure you are running Setup on the Windows 95/98 or Windows NT platform.</p>
<p><b>Route It! Setup has failed.</b>  <b>Setup requires Windows NT Version 4.0 or better.</b>                      Your Version of Windows NT is not supported.</p>
<p><b>Route It! Setup has failed.</b>  <b>Microsoft TCP/IP protocol is not installed</b>                      Please install this software before installing Route It!</p>

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**Table 2-1. Installation Error and Warning Messages (Cont'd)**

<b>Error Message and Corrective Action</b>
<p><b>Route It! Setup has failed.</b>  <b>Microsoft Dial-Up Adapter is not installed.</b>                      Please install this software before installing Route It!</p>
<p><b>Route It! Setup has failed.</b>  <b>Microsoft Dial-Up Networking is not installed.</b>                      Please install this software before installing Route It!</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! requires VGA or better resolution.</b>                      Please load Route It! on a machine with VGA resolution.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! requires an Intel-based 486 processor or better.</b>                      Please load Route It! on a machine with a 486 or better processor.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! requires the current user to have administrator privileges for installation.</b>                      Please use an account with administrator privileges.</p>
<p><b>Route It! Setup has failed.</b>  <b>Setup is unable to create the target directory x:\Program Files\Routelt.</b>                      Please contact Technical Support.</p>

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**Table 2-1. Installation Error and Warning Messages (Cont'd)**

<b>Error Message and Corrective Action</b>
<p><b>Setup cannot continue.</b>  <b>Setup is does not have write permissions on the target directory x:\Program Files\Routelt.</b>                      Please ensure you have write permission for this directory or select another target path.</p>
<p><b>Route It! Setup has failed.</b>  <b>Setup was unable to find directory x:\Program Files\Routelt.</b>                      Please contact Route It! Technical Support.</p>
<p><b>There is not enough space available on the disk x:\Program Files\Routelt.</b>                      Please free up some space or change the target location to a different disk. Route It! requires at least 50 Megs of free disk space.</p>
<p><b>Setup has detected less than 250 Megs of free space on this disk.</b>                      While this is enough space for a Route It! installation, future upgrades and intense database usage may exhaust that space.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! was unable to perform database configuration file copy procedure.</b>                      Please contact Route It! Technical Support.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! was unable to perform database copy procedure.</b>                      Please contact Route It! Technical Support.</p>
<p><b>Route It! Setup has failed.</b>  <b>Setup was unable to start the Route It! System Administration.</b>                      Please contact Technical Support.</p>

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**Table 2-1. Installation Error and Warning Messages (Cont'd)**

<b>Error Message and Corrective Action</b>
<b>Route It! Setup has failed.</b> <b>The System Administration task has failed.</b> Please contact Technical Support.
<b>Route It! Setup has failed.</b> <b>Route It! cannot obtain System Information.</b> Please contact Technical Support.
<b>Route It! Setup has failed.</b> <b>Installation of ODBC was NOT successful.</b> Please contact Technical Support.
<b>Your entry is not a valid IP Address</b> Please re-enter the IP Address.

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## Setting Up Route It! on a LAN

# 3

---

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## Setting Up Route It! on a LAN

# 3

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This chapter describes how to install the AT&T Route It! software on a Microsoft Windows local area network (LAN).

### Overview

---

When you install Route It! on a LAN, you need to designate the following PCs:

- **Database/Communications Server**  
One PC on the LAN must be designated as the database/communications server. This PC contains the Route It! database. The database/communications server is also where the Transaction Manager resides. The Transaction Manager controls communications between one or more Route It! PCs on the LAN and the host support system.

After setup, you can use Route It! at the database/communications server.

- **Client PC(s)**  
All other PCs on the LAN are client PCs. Users can run Route It! on each client PC. The database/communications server provides database and communications capabilities to each client PC.

⇒ **NOTE:**

For information on hardware and software requirements, see Chapter 1, "Hardware and Software Requirements."

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### **If You Are Installing for the First Time**

---

Follow the procedures in these sections in the order shown:

- (1) "Setting Up the Database/Communications Server"
- (2) "Setting Up a Client PC"

### **If You Are Updating**

---

If you have an existing Route It! LAN with Route It! Release 99.3, you need to install Route It! 2002.3 on the database/communications server and then on each client PC.

For installation instructions, see the subsection "Installing or Updating Route It! Software" in each of the following sections:

- "Setting Up the Database/Communications Server"
- "Setting Up a Client PC"

## **Setting Up the Database/Communications Server**

---

To install Route It! on the database/communications server for the first time, you need to install the following software in the order shown:

- (1) Microsoft Windows NT 4.0 (with Service Pack 4 or Service Pack 5) server using TCP/IP.
- (2) Route It! Release 2002.3

To update an existing Route It! database/communications server (one that already has Route It! 99.3 installed), you need to install Route It! Release 2002.3. For installation instructions, see the section "Installing or Updating Route It! Software," later in this chapter.

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## Installing Windows-Based Components

---

This section describes how to check for and install the following Windows-based components on the database/communications server:

- TCP/IP
- Dial-Up Networking

### Installing TCP/IP

This section explains how to check for the TCP/IP Windows-based component on the database/communications server and how to install it, if it is not already installed. If TCP/IP is already installed on your PC, you can go to the next section, "Installing Dial-Up Networking."

To see if TCP/IP is installed, follow these steps at the PC designated as the database/communications server:

1. On the Windows NT taskbar, click **Start**.
2. Point to **Settings**, then click **Control Panel**.  
The Control Panel window appears.
3. In the Control Panel window, double-click **Network**.  
The Network dialog box appears.
4. At the Network dialog box, click the **Protocols** tab.
  - If **TCP/IP Protocol** appears in the list, TCP/IP is already installed on your PC.  
Click **Cancel** and go to the next section, "Installing Dial-Up Networking."
  - If **TCP/IP Protocol** does *not* appear, proceed to Step 5.
5. On the **Protocols** tab, click **Add**.  
The Select Network Protocol dialog box appears.

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6. At the Select Network Protocol dialog box, select **TCP/IP Protocol**, then click **OK**.

The TCP/IP Setup dialog box appears with the following warning:

**If there is a DHCP server on your network, TCP/IP can be configured to dynamically provide an IP address. If you are not sure, ask your system administrator. Do you wish to use DHCP?**

7. Click **Yes**.

The Files Needed dialog box appears.

8. Insert the Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5) CD-ROM into the CD-ROM drive.
9. At the Files Needed dialog box, enter x:i386 in the **Copy Files From** text box, where x is the letter that corresponds to the CD-ROM drive.

10. Click **Continue**.

The installation process will copy the necessary files to your hard drive.

The Setup dialog box appears with the following warning:

**Setup has discovered that you have Remote Access Services (RAS) installed.  
Do you want to configure RAS to support the TCP/IP protocol?**

11. Click **OK**.

The Remote Access Setup dialog box appears.

12. At the Remote Access Setup dialog box, click **Continue**.

The Network dialog box appears.

13. At the Network dialog box, click **Close**.

A message appears indicating that you must restart your PC.

14. Click **Yes**.

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### Installing Dial-Up Networking

This section describes how to check for Dial-Up Networking on the database/communications server and how to install it, if it is not already installed. If Dial-Up Networking is already installed on your PC, you can go to the next section, "Installing SQLBase Server Software."

⇒ **NOTE :**

If you are installing Dial-Up Networking on Windows NT, you must also install Service Pack 4 or Service Pack 5 after you have installed the Dial-Up Networking.

To check for and install Dial-Up Networking on your PC, follow these steps at the PC designated as the database/communications server:

1. Double-click the My Computer icon.
2. Double-click on **Dial-Up Networking**.

The Dial-Up Networking dialog box appears.

- If **Phonebook entry to Dial** appears, Dial-Up Networking is already installed on your PC.

Click on **Close** and go to the next section, "Installing SQLBase Server Software."

- If Dial-Up Networking is *not* installed on your PC, the Dial-Up Networking Install window appears.

3. At the Dial-Up Networking Install window, click **Install**.

The Files Needed dialog box appears.

4. Insert the Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5) CD-ROM into the CD-ROM drive.
5. At the Files Needed dialog box, enter x:i386 in the **Copy Files From** text box, where x is the letter that corresponds to the CD-ROM drive.

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6. Click **OK**.

The installation process will copy the necessary files to your hard drive.

The Add RAS Device dialog box appears, listing the modem that is installed on your PC.

7. At the Add RAS Device dialog box, click **OK**.

### **Installing or Updating Route It! Software**

---

This section describes how to install Route It! on the database/communications server for the first time or as an update.

To install Route It! software on a single PC, follow these steps:

⇒ **NOTE :**

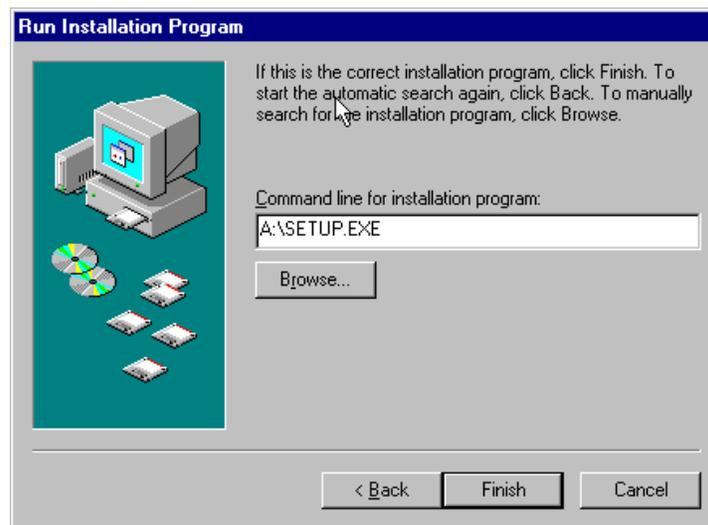
If you are installing or upgrading Route It! on a Windows NT PC, you **MUST** be logged on the PC with a user name that has permissions for administrative privileges. Before proceeding with any of the procedures given below, verify that your user name has the correct administrative permissions. Once you have verified this, enter your user name at the PC login prompt. This requirement **only** applies to installing or upgrading Route It! Any Windows NT user name will allow you to use Route It!

1. Make sure no other applications are running. Check the Windows 95/98/NT taskbar, and close all other applications.
2. Insert the CD-ROM, into the appropriate drive.
3. From the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button
  - (b) Point to **Settings**
  - (c) Click **Control Panel**

The Control Panel window appears.

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4. In the Control Panel window, double-click the Add/Remove Programs icon.  
The Add/Remove Programs Properties dialog box appears.
5. On the **Install/Uninstall** tab, choose **Install**.  
The Install Program From CD-ROM dialog box appears.
6. At the Install Program From CD-ROM dialog box, choose **Next**.  
Windows 95/98/NT checks the available drives for the presence of installation media, and the Run Installation Program dialog box appears.



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**Figure 3-1. Run Installation Program Dialog Box**

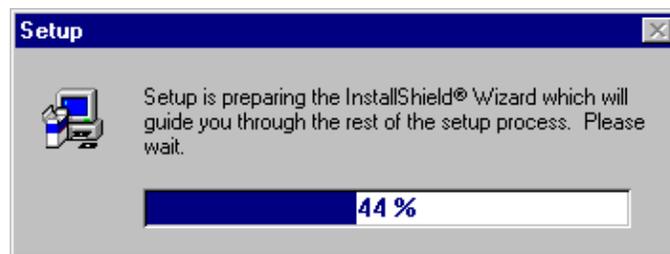
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7. At the Run Installation Program dialog box, do *one* of the following:
  - Use the **Back** button to start the automatic search again for the installation program.
  - Use the **Browse** button to manually search for the installation program.
  - Choose **Finish**, if this is the correct installation program.

⇒ **NOTE :**

The Route It! Setup window appears indicating that Setup is preparing the InstallShield Wizard which guides you through the rest of the setup process.

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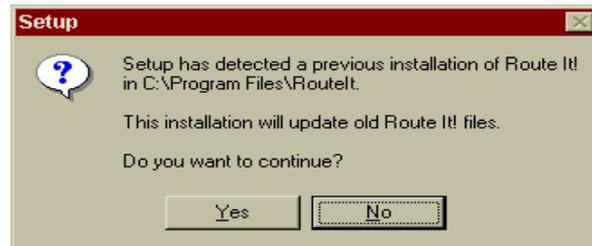
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**Figure 3-2. Setup Box**

The AT&T Route It! Welcome dialog box appears.

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8. At the Welcome dialog box, choose **Next**
  9. The Installation program checks for the presence of a previous release of AT&T Route It! A pop-up window appears on your screen indicating that Setup is searching for a previous installation of Route It!
    - If detected, the message box appears.
      - Select **Yes** if you wish to continue.
      - Select **No** if you wish to exit the installation process.
- 



---

**Figure 3-3. Previous Installation Message Box**

10. Click **Yes** to continue.

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- After clicking **Yes**, the Choose Destination Location dialog box for a previous installation appears. (**No** terminates the installation process.)

Keep the preset destination directory by choosing **Next**.

Or

Choose **Browse** to select a different directory, then choose **Next**.

⇒ **NOTE :**

It is highly recommended that you use the preset destination directory that Route It! Setup creates.

---



**Figure 3-4. Choose Destination Location Dialog Box for Previous Installation**

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- If the Installation program does *not* detect a previous release, the Choose Destination Location dialog box appears.

Keep the preset destination directory by choosing **Next**.

Or

Choose **Browse** to select a different directory, then choose **Next**.

⇒ **NOTE :**

It is highly recommended that you use the preset destination directory that Route It! Setup creates.

---



---

**Figure 3-5. Choose Destination Location Dialog Box**

11. A window appears indicating that the program is checking for disk space.

Click **OK**.

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The Installation Type dialog box appears. Route It! can be installed as a standalone PC installation or on a LAN using a Microsoft Windows NT 4.0 (with Service Pack 4 or Service Pack 5) server with TCP/IP. The selections available from the dialog box include:

- Standalone PC (Default)
- LAN Database/Communication Server
- LAN Client.

If this is a previous installation or upgrade, information available from the database from the previous installation is prepopulated when the following window is presented.

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12. Select the Installation Type.

---



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Figure 3-6. Installation Type Dialog Box

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13. After verifying that the LAN Database/Communication Server is selected, click **Next**.

The “What’s New” Setup windows for Route It! 2002.3 appear.

After the system files are successfully copied, several windows appear in succession. These windows are intended to communicate the following information:

- Connecting to database Server...
- Creating Route It! database...
- Connecting to Route It! database
- Building Route It! database...
- If this is a reinstall, go to Step 20.

14. At the Transaction Manager and Database Startup dialog box, do one of the following:

- To have the Transaction Manager and Database automatically start each time the operating system starts, choose **Yes**.
- To have the Transaction Manager and Database automatically start each time you start Route It!, choose **No**.

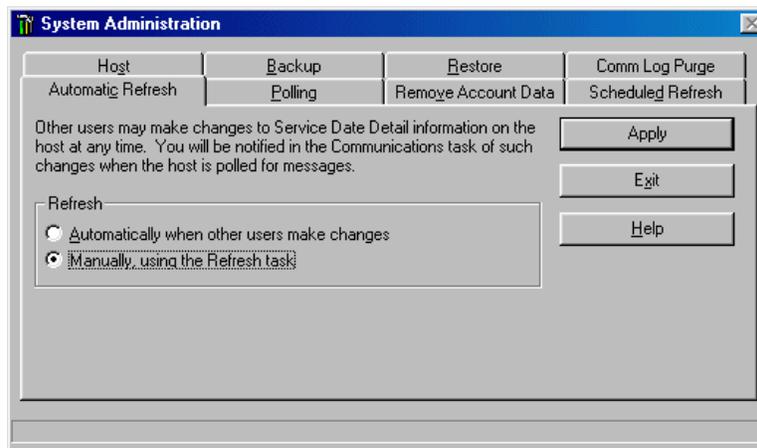


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**Figure 3-7. Transaction Manager and Database Startup Dialog Box**

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15. At the end of installation, the Route It! Setup program creates the database, if it does not already exist.
- If the database does exist, then the Installation is Complete window appears. Proceed to Step 20.  
The database will be updated for this release.
  - If the database does *not* exist, it is created (as indicated by the “Building Database” window).  
The System Administration message box appears. Proceed to Step 16.
- 

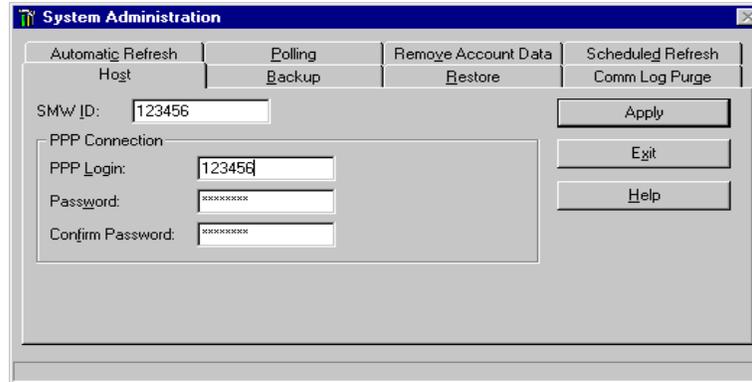


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**Figure 3-8. System Administration Message Box**

16. At the System Administration message box, choose **OK**.  
The System Administration window appears, with the **Host** tab selected.

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**Figure 3-9. System Administration Host Tab**

17. On the **Host** tab, type your ID and logon information in the appropriate text boxes, choose **Apply**, then choose **Exit**.

⇒ **NOTE 1:**

Exit only exits the System Administration window. It does not exit Route It!

⇒ **NOTE 2:**

You **MUST** enter the following information:

- SMW ID
- PPP Login
- Password
- Confirm Password.

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The System Administration Connection to Host dialog box appears.

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**Figure 3-10. System Administration Connection to Host Dialog Box**

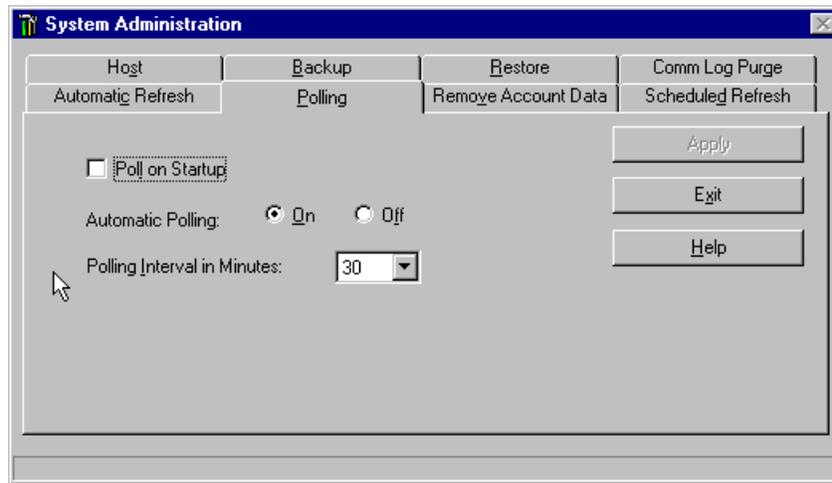
**18.** At the System Administration Connection to the Host dialog box, do *one* of the following:

- To complete the installation, choose **OK**. Proceed to Step 20.
- To prevent connection to the support system each time Route It! starts, choose **Cancel**.

The System Administration window appears, with the **Polling** tab selected. Proceed to Step 19.

**19.** At the System Administration window **Polling** tab, clear the **Poll on Startup** check box, choose **Apply**, then choose **Exit**.

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**Figure 3-11. System Administration Polling Tab**

**⇒ NOTE 1:**

To learn more about the System Administration window **Polling** tab, see the section “Selecting Automatic or Manual Polling” in Chapter 4, “System Administration,” of the *AT&T Route It! Administration* guide.

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- ⇒ **NOTE 2:**  
The AT&T Route It! window is created.
- 



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**Figure 3-12. AT&T Route It! Window**

A message appears, stating that the installation for AT&T Route It! 2002.3 is complete.

20. Choose **OK**.
21. If system files need to be updated, Windows must be restarted to complete the installation. The Restart Windows window gives you the option to restart the computer now or later.

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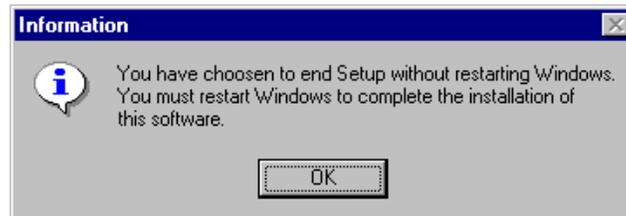
**Figure 3-13. Restart Windows**

- To restart the computer later, choose **No** and then choose **OK**.

⇒ **NOTE:**

Remember that you must later restart Windows to complete the installation of the software.

---



---

**Figure 3-14. End Setup Dialog Box**

- To restart the computer now, choose **Yes** and then choose **OK**. Before restarting the computer, you should close any open applications, including MS-DOS sessions.

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22. If this installation is an upgrade from a previous release, a reinstallation of the current release, or a new installation, you should perform a Refresh of detailed information. This is especially important for dialed numbers, since a Refresh sets the payphone blocking indicator to the correct value for each account. (For more information, see Chapter 3, "Refresh," in the *AT&T Route It! Administration* guide.)

## Setting Up a Client PC

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### Setting Up a Client PC for the First Time

If you are setting up a client PC for the first time, you need to install the following software:

- (1) TCP/IP Windows-based component, if it is not already installed
- (2) Route It! 2002.3

### Updating an Existing Route It! Client PC

To update an existing Route It! client PC, you need to install Route It!

For installation instructions, see the section "Installing or Updating Route It! Software," later in this chapter.

### Installing TCP/IP

---

If you are installing AT&T Route It! for the first time, you need to install the Windows-based TCP/IP component. Follow *one* of the procedures in the next two sections, depending on whether you are using Windows 95/98 or Windows NT.

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### Installing TCP/IP in Windows 95/98

This section explains how to check for the TCP/IP component and how to install it, if it is not already installed. To see if TCP/IP is installed on your PC, follow these steps:

1. On the Windows 95/98 taskbar, click **Start**.
2. Point to **Settings**, then click **Control Panel**.  
The Control Panel window appears.
3. In the Control Panel window, double-click the Network icon.  
The Network dialog box appears.
4. At the Network dialog box, select the **Configuration** tab.  
**TCP/IP** appears in the list box if TCP/IP is already installed.  
If TCP/IP is *not* installed, complete the following procedure.

To install TCP/IP, follow these steps:

1. Display the Network dialog box, as described in the previous procedure.
2. At the Network dialog box, select the **Configuration** tab.
3. On the **Configuration** tab, choose **Add**.  
The Select Network Component Type dialog box appears.
4. Select **Protocol** from the list box in the Select Network Component Type dialog box, then click the **Add** button.  
The Select Network Protocol dialog box appears.
5. At the Select Network Protocol dialog box, do the following:
  - a. Under **Manufacturers**, select **Microsoft**.
  - b. Under **Network Protocols**, select **TCP/IP**.
  - c. Choose **OK**.  
You are returned to the Network dialog box.

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6. On the Network dialog box, click **OK**.

A message appears indicating that you must restart your PC.

7. Choose **Yes** to restart your PC.

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### Installing TCP/IP in Windows NT Workstation 4.0

This section explains how to check for the TCP/IP component and how to install it, if it is not already installed. To see if TCP/IP is installed on your PC, follow these steps:

1. On the Windows NT taskbar, click **Start**.
2. Point to **Settings**, then click **Control Panel**.  
The Control Panel window appears.
3. In the Control Panel window, double-click the Network icon.  
The Network dialog box appears.
4. At the Network dialog box, select the **Protocols** tab.
  - If **TCP/IP Protocol** appears in the list, TCP/IP is already installed on your PC.  
Click **Cancel** and go to the next section, "Installing AT&T Route It!"
  - If **TCP/IP Protocol** does *not* appear, go to Step 5.
5. On the **Protocols** tab, click **Add**.  
The Select Network Protocol dialog box appears.
6. At the Select Network Protocol dialog box, select **TCP/IP Protocol** and click **OK**.  
The TCP/IP Setup dialog box appears, displaying the following warning:  
**If there is a DHCP server on your network, TCP/IP can be configured to dynamically provide an IP address. If you are not sure, ask your system administrator. Do you wish to use DHCP?**
7. Click **Yes**.  
The Files Needed dialog box appears.
8. Insert the Windows NT Workstation 4.0 (with Service Pack 4 or Service Pack 5) CD-ROM into the CD-ROM drive.
9. At the Files Needed dialog box, enter x:i386 in the **Copy Files From** text box, where x is the letter that corresponds to the CD-ROM drive.
10. Click **Continue**.

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The installation process copies the necessary files to your hard drive.

The Setup dialog box appears, displaying the following warning:

**Setup has discovered that you have Remote Access Services (RAS) installed.**

**Do you want to configure RAS to support the TCP/IP protocol?**

11. Click **OK**.

The Remote Access Setup dialog box appears.

12. At the Remote Access Setup dialog box, click **Continue**.

The Network dialog box appears.

13. At the Network dialog box, click **Close**.

A message appears indicating that you must restart your PC.

14. Click **Yes**.

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### **Installing or Updating Route It! Software**

---

This section describes how to install Route It! on the database/communications server for the first time or as an update.

To install Route It! software on a single PC, follow these steps:

1. Make sure no other applications are running. Check the Windows 95/98/NT taskbar, and close all other applications.
2. Insert the CD-ROM, into the appropriate drive.
3. From the Windows 95/98/NT taskbar:
  - Click the **Start** button
  - Point to **Settings**
  - Click **Control Panel**.

The Control Panel window appears.

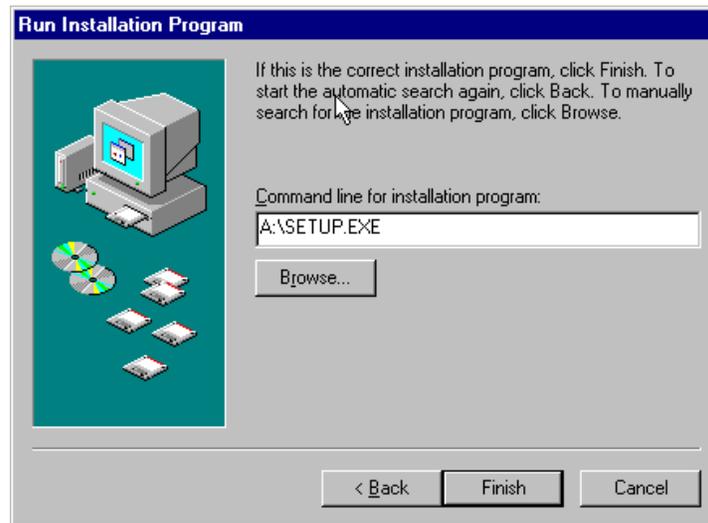
4. In the Control Panel window, double-click the Add/Remove Programs icon.  
The Add/Remove Programs Properties dialog box appears.
5. On the **Install/Uninstall** tab, choose **Install**.  
The Install Program From CD-ROM dialog box appears.

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6. At the Install Program From CD-ROM dialog box, choose **Next**.

Windows 95/98/NT checks the available drives for the presence of installation media, and the Run Installation Program dialog box appears.

---



---

**Figure 3-15. Run Installation Program Dialog Box**

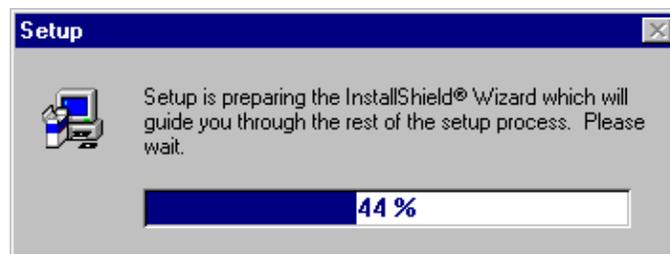
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7. At the Run Installation Program dialog box, do *one* of the following:
  - Use the **Back** button to start the automatic search again for the installation program.
  - Use the **Browse** button to manually search for the installation program.
  - Choose **Finish**, if this is the correct installation program.

⇒ **NOTE :**

The Route It! Setup window appears indicating that Setup is preparing the InstallShield Wizard which will guide you through the rest of the setup process.

---



---

**Figure 3-16. Setup Box**

The AT&T Route It! Welcome dialog box appears.

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8. At the Welcome dialog box, choose **Next**
  9. The Installation program checks for the presence of a previous release of AT&T Route It! A pop-up window will appear on your screen indicating that Setup is searching for a previous installation of Route It!
    - If detected, the message box appears.
      - Select **Yes** if you wish to continue.
      - Select **No** if you wish to exit the installation process.
- 



---

**Figure 3-17. Previous Installation Message Box**

10. Click **Yes** to continue.

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- After clicking **Yes**, the Choose Destination Location dialog box for a previous installation appears. (**No** terminates the installation process.)

Keep the preset destination directory by choosing **Next**.

Or

Choose **Browse** to select a different directory, then choose **Next**.

⇒ **NOTE :**

It is highly recommended that you use the preset destination directory that Route It! Setup creates.

---



**Figure 3-18. Choose Destination Location Dialog Box for Previous Installation**

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- If the Installation program does *not* detect a previous release, the Choose Destination Location dialog box appears.

Keep the preset destination directory by choosing **Next**.

Or

Choose **Browse** to select a different directory, then choose **Next**.

⇒ **NOTE :**

It is highly recommended that you use the preset destination directory that Route It! Setup creates.

---



---

**Figure 3-19. Choose Destination Location Dialog Box**

11. A window appears indicating that the program is checking for disk space.

Click **OK**.

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The Installation Type dialog box appears. Route It! can be installed as a standalone PC installation or on a LAN using a Microsoft Windows NT 4.0 (with Service Pack 4 or Service Pack 5) server with TCP/IP. The selections available from the dialog box include:

- Standalone PC (Default)
- LAN Database/Communication Server
- LAN Client.

If this is a previous installation or upgrade, information available from the database from the previous installation is prepopulated when the following window is presented.

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12. Select the Installation Type.

---

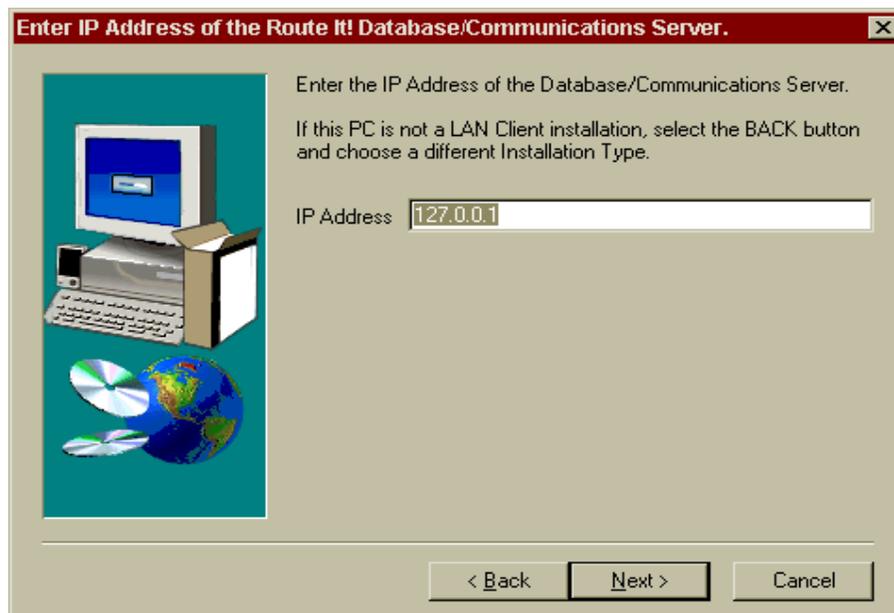


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Figure 3-20. Installation Type Dialog Box

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13. After verifying that LAN Client is selected, click **Next**.  
The IP Address Dialog Box appears.



---

**Figure 3-21. IP Address Dialog Box**

14. Enter the IP Address and click **Next**.
15. If system files need to be updated, Windows must be restarted to complete the installation. The Restart Windows window gives you the option to restart the computer now or later.

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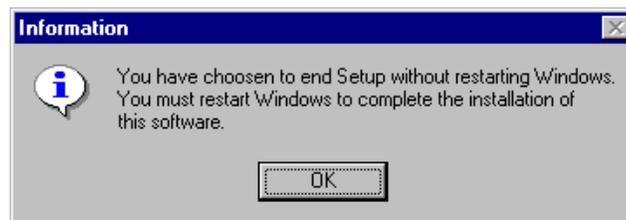
**Figure 3-22. Restart Windows**

- To restart the computer later, choose **No** and then choose **OK**.

⇒ **NOTE :**

Remember that you must later restart Windows to complete the installation of the software.

---



---

**Figure 3-23. End Setup Dialog Box**

- To restart the computer now, choose **Yes** and then choose **OK**. Before restarting the computer, you should close any open applications, including MS-DOS sessions.

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A message appears, stating that the installation for AT&T Route It! 2002.3 is complete.

16. Follow the instructions displayed by the Route It! Setup program.
17. Choose **OK**.
18. If this installation is an upgrade from a previous release, a reinstallation of the current release, or a new installation, you should perform a Refresh of detailed information. This is especially important for dialed numbers, since a Refresh sets the payphone blocking indicator to the correct value for each account. (For more information, see Chapter 3, "Refresh," in the *AT&T Route It! Administration* guide.)

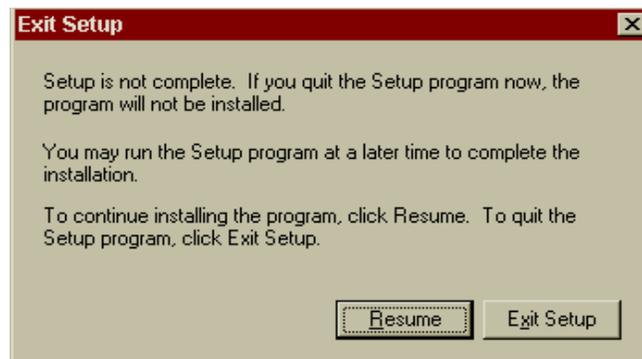
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⇒ **NOTE 1:**

If you quit the Install process before it is complete, the “Route It! Setup Exit” message is displayed.

⇒ **NOTE 2:**

Click **Resume** to continue installing the program or click **Exit Setup** to quit the Setup program and exit Route It!



---

**Figure 3-24. Exit Setup Dialog Box**

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## **Starting AT&T Route It!**

---

To start AT&T Route It!, follow these steps:

1. On the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button,
  - (b) Point to **Programs**
  - (c) Point to **AT&T Routing Manager**
  - (d) Click **Route It!**

**OR**

- Double-click on the "Route It!" shortcut icon in AT&T Routing Manager folder on Programs Menu.
- If you just installed AT&T Route It! for the first time, proceed to Step 2.
- If you already had a previous version of AT&T Route It! installed, then the Welcome to AT&T Route It! User Login dialog box appears. Type your user name and password in the appropriate text boxes, then choose **OK**. Your previous login and password are still valid and will be transferred to the new release of software. Proceed to Step 4.

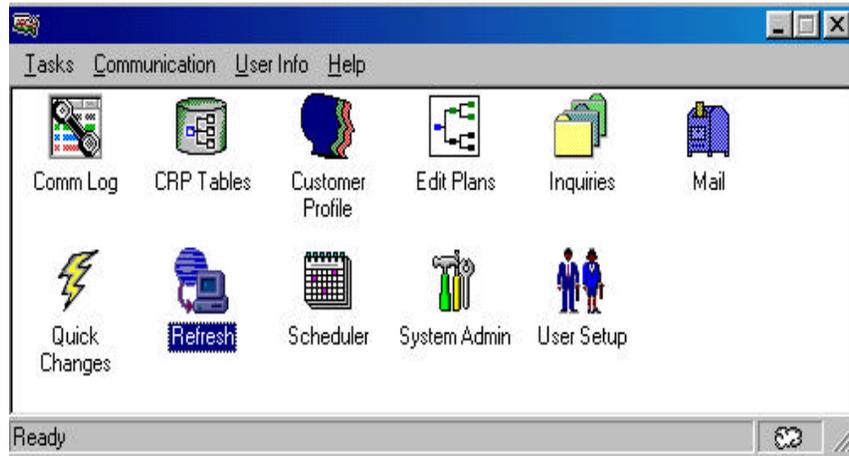
2. At the User Login dialog box, follow these steps:
  - a. In the **User Name** text box, type **ADMIN**.
  - b. In the **Password** text box, type **ADMIN**.
  - c. Choose **OK**.

You are prompted to change the administration password.

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3. To change the administration password, do the following:
  - a. Type ADMIN in the **Old Password** field.
  - b. Enter a new password in the **New Password** field, using from one to eight alphanumeric characters.
  - c. Enter the new password again in the **Confirm Password** field and choose **OK**.

The AT&T Route It! main window appears.



**Figure 3-25. AT&T Route It! Main Window**

4. Select the appropriate icon from the main window that corresponds to the task you want to perform.

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## Removing Route It! Software

---

Before removing Route It! software, remember that all Route It! files will be removed including:

- Route It! program files
- Route It! database files
- Dial-up networking entry
- Registry entries.

There are two ways to remove the Route It! application from your PC.

- Click on the **Uninstall** icon and verify the removal of the application
- Use the **Add/Remove Programs**.

Both methods are given in the following steps.

To delete Route It! using the Uninstall icon, follow these steps:

1. Exit Route It!
2. On the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button
  - (b) Point to **Programs**
  - (c) Point to **AT&T Routing Manager**.
  - (d) Double-click the **Uninstall Route It!** icon

The Confirm File Deletion dialog box appears to confirm your selection to remove Route It!

3. To remove Route It!, choose **Yes**.

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**OR**

To remove Route It! using the Add/Remove Programs, follow these steps:

1. Exit Route It!
2. On the Windows 95/98/NT taskbar:
  - (a) Click the **Start** button
  - (b) Point to **Settings**
  - (c) Click **Control Panel**.

The Control Panel window appears.

3. In the Control Panel window, double-click the **Add/Remove Programs** icon.

The Add/Remove Programs Properties dialog box appears.

4. Select **AT&T Route It!** from the list box and choose **Add/Remove**.

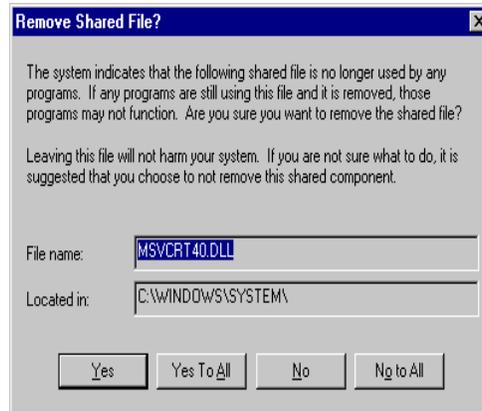
The Confirm File Deletion dialog box appears to confirm your selection to remove Route It!

5. To remove Route It!, choose **Yes**.

**⇒ NOTE :**

If a warning message appears asking if shared files should be removed, it is recommended that you choose **No to All**. If shared files are removed, other applications may be disrupted.

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**Figure 3-26. Shared File Warning Message Box**

6. When the uninstall is complete, choose **OK**.  
Route It! is removed from your PC.

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## **Troubleshooting the Installation Process**

Table 3-1 shows error and warning messages (in bold type) that appear for common installation problems and the actions (in nonbold type) you should take to remedy the problems.

**Table 3-1. Installation Error and Warning Messages**

<b>Error Message and Corrective Action</b>
<p><b>Route It! Setup has failed.</b>  <b>Route It! is currently running on this machine.</b>                      Please exit Route It! before installation.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! Transaction Manager is currently running on this machine.</b>                      Please close Route It! Transaction Manager before installation.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! and/or SQLBase is currently running on this machine.</b>                      Please exit these applications before installation.</p>
<p><b>Route It! Setup has failed.</b>  <b>This version of Route It! requires Windows 95/98 or Windows NT.</b>                      Check to make sure you are running Setup on the Windows 95/98 or Windows NT platform.</p>
<p><b>Route It! Setup has failed.</b>  <b>Setup requires Windows NT Version 4.0 or better.</b>                      Your Version of Windows NT is not supported.</p>

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**Table 3-1. Installation Error and Warning Messages (Cont'd)**

<b>Error Message and Corrective Action</b>
<p><b>Route It! Setup has failed.</b>  <b>Microsoft TCP/IP protocol is not installed</b>                      Please install this software before installing Route It!</p>
<p><b>Route It! Setup has failed.</b>  <b>Microsoft Dial-Up Adapter is not installed.</b>                      Please install this software before installing Route It!</p>
<p><b>Route It! Setup has failed.</b>  <b>Microsoft Dial-Up Networking is not installed.</b>                      Please install this software before installing Route It!</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! requires VGA or better resolution.</b>                      Please load Route It! on a machine with VGA resolution.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! requires an Intel-based 486 processor or better.</b>                      Please load Route It! on a machine with a 486 or better processor.</p>
<p><b>Route It! Setup has failed.</b>  <b>Route It! requires the current user to have administrator privileges for installation.</b>                      Please use an account with administrator privileges.</p>
<p><b>Route It! Setup has failed.</b>  <b>Setup is unable to create the target directory x:\Program Files\Routelt.</b>                      Please contact Technical Support.</p>

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**Table 3-1. Installation Error and Warning Messages (Cont'd)**

Error Message and Corrective Action
<p><b>Setup cannot continue.</b></p> <p><b>Setup is does not have write permissions on the target directory x:\Program Files\Routelt.</b></p> <p>Please ensure you have write permission for this directory or select another target path.</p>
<p><b>Route It! Setup has failed.</b></p> <p><b>Setup was unable to find directory x:\Program Files\Routelt.</b></p> <p>Please contact Route It! Technical Support.</p>
<p><b>There is not enough space available on the disk x:\Program Files\Routelt.</b></p> <p>Please free up some space or change the target location to a different disk. Route It! requires at least 50 Megs of free disk space.</p>
<p><b>Setup has detected less than 250 Megs of free space on this disk.</b></p> <p>While this is enough space for a Route It! installation, future upgrades and intense database usage may exhaust that space.</p>
<p><b>Route It! Setup has failed.</b></p> <p><b>Route It! was unable to perform database configuration file copy procedure.</b></p> <p>Please contact Route It! Technical Support.</p>
<p><b>Route It! Setup has failed.</b></p> <p><b>Route It! was unable to perform database copy procedure.</b></p> <p>Please contact Route It! Technical Support.</p>

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**Table 3-1. Installation Error and Warning Messages (Cont'd)**

<b>Error Message and Corrective Action</b>
<b>Route It! Setup has failed.</b> <b>Setup was unable to start the Route It! System Administration.</b> Please contact Technical Support.
<b>Route It! Setup has failed.</b> <b>The System Administration task has failed.</b> Please contact Technical Support.
<b>Route It! Setup has failed.</b> <b>Route It! cannot obtain System Information.</b> Please contact Technical Support.
<b>Route It! Setup has failed.</b> <b>Installation of ODBC was NOT successful.</b> Please contact Technical Support.
<b>Your entry is not a valid IP Address</b> Please re-enter the IP Address.

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# User Setup

# 4

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## User Setup

# 4

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This chapter describes how the AT&T Route It! system administrator (user name ADMIN) applies the User Setup task to add Route It! users and user permissions.

### User Permissions

---

User permissions define the scope of access each person has to Route It! data and tasks. Route It! has two types of user permissions:

- **Account Access**—As administrator, you can specify the Account IDs to which users have access. Blocking access to an Account ID prevents a user from seeing or working with data for that Account ID. The Account ID setting applies to all tasks in Route It!, except Refresh, Comm Log, Mail, System Administration, and User Setup.
- **Task Send Permissions**—For all Account IDs to which a user has access, you can specify the Route It! tasks from which the user can send changes to the support system. For example, if you remove a user's send permissions in Edit Plans, the **Send** command is unavailable in Edit Plans for all Account IDs to which the user has access. (The user can still modify local plans but cannot send them to the support system.) You can set send permissions for all tasks in Route It!, except Refresh, Comm Log, Mail, System Administration, and User Setup.

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### **Basic Rules for User Permissions**

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Keep the following in mind about user permissions:

- When a new Account ID comes into use, all users initially have access to data for that Account ID. The data for a new Account ID becomes available after a refresh of detailed information in Refresh. Access to all users remains in effect until the administrator updates account access permissions.
- User permissions are saved when you upgrade to a new release of Route It! You do not have to reset them after an upgrade.

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## Starting User Setup

---

To start User Setup, do *one* of the following at the Route It! main window:

- Double-click the User Setup icon.
- From the Route It! Tasks menu, choose **User Setup**.

The User Setup window appears, with the **Account Access Permissions Summary** tab displayed.

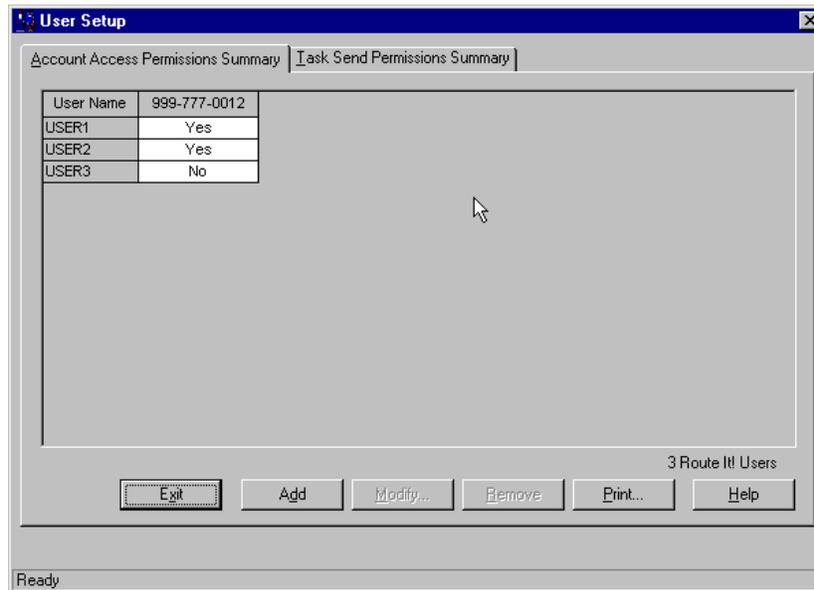


Figure 4-1. User Setup Window

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## **Displaying a Summary of User Permissions**

These two tabs on the User Setup window allow you to display a summary of user permissions:

- **Account Access Permissions Summary tab**—For each Route It! user, this tab shows the Account IDs to which a user has access.
- **Task Send Permissions Summary tab**—For each Route It! user, this tab shows the Route It! tasks from which the user can send changes to the support system.

These tabs also allow you to:

- Set up permissions for new users.
- Modify user permissions.
- Remove user access to Route It!
- Print a summary of user permissions for all users.

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## **Adding a New User**

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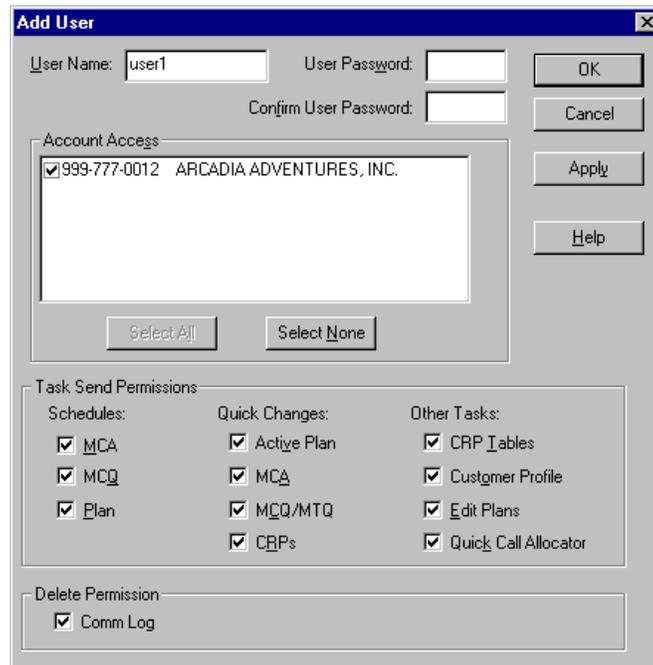
To set up a new user, you need to enter a user name and password. (The user can change the password later, as described in Chapter 1, "Overview," of the *AT&T Route It! Edit Plans User's Guide*.) You can also specify user permissions. When you give a user access to Route It! for the first time, by default, the user has access to data for *all* Account IDs and also has send privileges in all tasks.

To add a new user, follow these steps:

1. At the User Setup window, click **Add**.

The Add User dialog box appears.

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**Figure 4-2. Add User Dialog Box**

2. Enter a user name and password as follows:
  - a. In the **User Name** text box, enter a user name that has 1 to 8 letters or numbers.
  - b. In the **User Password** text box, enter a user password that has 4 to 12 characters. The password is case-sensitive.
  - c. In the **Confirm User Password** text box, enter the password exactly as entered in the **User Password** text box.

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3. Set permissions as follows:

- To set *account access permissions*, in the **Account Access** box, select or clear Account ID check boxes as indicated in Table 4-1:

**Table 4-1. Selecting or Clearing Account ID Check Boxes for Added Users**

To...	Do This
Give the user access to data for an Account ID	Select the check box for the Account ID.
Prevent the user from viewing or working with data for an Account ID	Clear the check box for the Account ID.
Give the user access to <i>all</i> Account IDs listed	Choose <b>Select All</b> .
Prevent the user from viewing or working with data for any Account ID listed	Choose <b>Select None</b> .

- To set *task send permissions*, under **Task Send Permissions**, select or clear check boxes for **Schedules**, **Quick Changes**, and **Other (Route It!) Tasks**.
  - To set *delete permission* for Comm Log messages, under **Delete Permissions**, select or clear the **Comm Log** checkbox.
4. Save user permission settings by doing *one* of the following:
- To save settings *and* close the Add User dialog box, choose **OK**.
5. To cancel settings, choose **Cancel**. You will receive a warning message indicating that a cancel will loose any changes to the permissions on the screen. Select *one* of the following:
- Choose **Yes** to cancel changes and return to the User Setup window.
  - Choose **No** to close Warning message screen and return to the Add User window.

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## Modifying User Permissions

---

You can modify user permissions for one or more users. If you modify permissions for a group of users, the changes you make apply to all selected users.

To modify user permissions, follow these steps:

1. At the User Setup window, select one or more users.

To select more than one user, press **Ctrl** or **Shift** while clicking user names. You can also drag the pointer across several rows to select multiple users.

2. Click **Modify**.

The Modify User dialog box appears.

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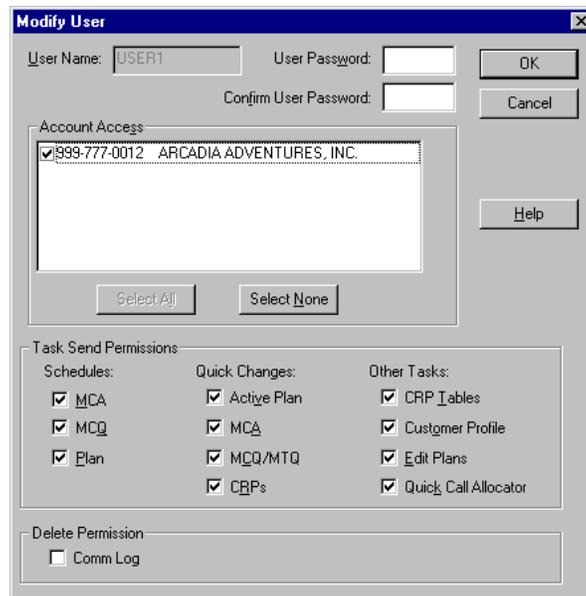


Figure 4-3. Modify User Dialog Box

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3. Change a user's password as follows:
  - a. In the **User Password** text box, type a new password from 4 to 12 characters long.
  - b. In the **Confirm User Password** text box, retype the new password.

⇒ **NOTE :**

You can change the password for only one user at a time.

4. Set permissions as follows:
  - To set *account access permissions*, in the **Account Access** box, select or clear Account ID check boxes as indicated in Table 4-2:

**Table 4-2. Selecting or Clearing Account ID Check Boxes When Modifying User Permissions**

To...	Do This
Give the user access to one or more Account IDs	Select the check box for each Account ID.
Prevent user access to one or more Account IDs	Clear the check box for each Account ID.
Give the user access to <i>all</i> Account IDs listed	Choose <b>Select All</b> .
Prevent user access to any Account ID listed	Choose <b>Select None</b> .

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If you are changing permissions for more than one user, each check box on the Modify User dialog box can appear as *one* of the following:

- Unshaded check mark—*All* users have access to the selected item.
- Shaded check mark—*Some* users have access to the selected item.
- Blank—*No* users have access to the selected item.

You may need to click a check box more than once to reach the desired setting. When clicked more than once, a check box alternates between a checked box and a blank box.

- To set *task send permissions*, under **Task Send Permissions** box, select or clear check boxes for **Schedules**, **Quick Changes**, and **Other** (Route It!) **Tasks**.
  - To set *delete permission* for Comm Log messages, under **Delete Permissions**, select or clear the **Comm Log** checkbox.
5. Save user permission settings by doing one of the following:
    - To save settings and close the Add User dialog box, choose **OK**.
    - To save settings without closing the Add User dialog box, choose **Apply**.
  6. To cancel settings, choose **Cancel**. You will receive a warning message indicating that a cancel will loose any changes to the permissions on the screen. Select *one* of the following:
    - Choose **Yes** to cancel changes and return to the User Setup window.
    - Choose **No** to close Warning message screen and return to the Add User window.

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## **Removing User Access to Route It!**

To remove a user's access to Route It!, follow these steps:

1. At the User Setup window, select one or more users.

To select more than one user, press **Ctrl** or **Shift** while clicking user names.

2. Click **Remove**.

A confirmation message appears.

3. At the confirmation message, choose **Yes** to remove access to Route It! for the selected user(s).

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