



Upgrading to Octel 50 Version 4.0

This note provides procedures for upgrading the following versions to Octel 50:

- Smooth Operator Version 3.1 and later
- Smooth Operator Lite

Complete the necessary steps in this section for preparing the existing Smooth Operator system before attempting to install this release of Octel 50.

Procedures in this note assume that the hard drive on which the current Smooth Operator system is installed is drive C: and the disk drive is A:. Drive designations on the specific PC on which you are working may vary. Confirm the appropriate drive letters when necessary in procedures provided in this section.

Understanding the Upgrade Process

The upgrade process involves two basic steps:

- Preparing the system for the upgrade, which includes backing up system information and confirming the integrity of the existing system's database
- Upgrading the Smooth Operator system, which includes installing the Octel 50 software

Preparing the System for the Upgrade

You must complete the following procedures to prepare the system for the upgrade:

- Upgrade the sentinel
- Back up Smooth Operator files

Upgrading the Sentinel

You must upgrade the sentinel on the messaging system PC to allow it to function with this release.

If you are upgrading from a Smooth Operator version prior to 3.3, you may receive a new sentinel instead of the sentinel upgrade utility disk. In this case, skip the procedure to upgrade the sentinel and proceed to Backing Up Smooth Operator Files. You must replace the system's existing sentinel with the new sentinel before you install Octel 50.

Be aware of the following issues before upgrading the sentinel:

- The data file provided in the sentinel upgrade is keyed to work exclusively on the messaging system sentinel assigned the serial number specified when you ordered the upgrade. Therefore, a separate sentinel upgrade disk must be used for each system.
- When the upgrade utility executes, it reads the messaging system's sentinel. It then checks both the serial number and the current sentinel settings against the data file on the disk. If the settings do not match, the error message "Invalid data file for this sentinel" is written to a file named ERROR.LOG on the disk and the upgrade process is terminated. If this occurs, call a technical support representative immediately. If the upgrade process is terminated, you will still be able to run the messaging system using the previous version—neither the sentinel nor the messaging system is disabled.
- The sentinel for which the upgrade was ordered should be the only sentinel attached to the messaging system. Any attempt to upgrade multiple sentinels at the same time will result in the additional sentinels being disabled.

To upgrade the sentinel:

1. Shut down the Smooth Operator system if it is currently running.
2. Install any additional hardware or peripherals. For more information on installing and configuring hardware, see Chapter 3, "Installing the Hardware," in the *Installation Guide*.
3. Reboot the PC. When the PC reboots, a menu displays.
4. Press <3> to select Return to DOS. The \DOS directory prompt displays.
5. Insert the upgrade disk in the A: drive.
6. At the \DOS directory prompt, type A: then press <ENTER>.
7. At the A:\ prompt, type `SUU` then press <ENTER>. When the upgrade procedure is finished, the message "Sentinel upgrade complete" displays.
8. Press <CTRL+ALT+DEL> to reboot the PC.

Prepare the System for the Upgrade

Use this procedure to prepare the existing Smooth Operator system for the upgrade to Octel 50.

To back up Smooth Operator files:

1. If the Smooth Operator system is **not** running, proceed with step 2. If the Smooth Operator system is running:
 - a. If the Mailbox Status screen is open and the Exit button is highlighted, press <ENTER>. The Mailbox Status screen closes and the menu bar is activated with the File menu highlighted.
 - b. Press <ALT+F> to view the File menu options.
 - c. From the File menu, use the down arrow key to select Exit, then press <ENTER>. The Shutdown System dialog box displays.

- d. Select Shutdown, then press <ENTER>. The system shutdown completes and the \CVR prompt displays.
2. Press <CTRL+ALT+DEL> to reboot the PC.
3. When the menu to run Smooth Operator, run Setup, or return to DOS displays, press 3 to Return to DOS.
4. Back up the \CVR directory to another installed hard drive, to the same hard drive, to disk, or to a backup device such as a tape backup. To back up the \CVR directory to another directory on the same hard drive, for example:
 - a. From the \CVR directory prompt, type `XCOPY *.* C:\CVROLD` then press <ENTER>.
 - b. When prompted whether CVROLD specifies a directory or a file, type `D` then press <ENTER> to accept. Write down the name of the backup directory you created (in this example, CVROLD) below.

Backup CVR Directory Name: _____

If the existing Smooth Operator system has custom phrases in the SO3-ALL.* and SO3-D1.* files in the \CVR directory, you must run V-Edit when the backup is complete to manually replace individual standard phrases in the new phrase file with any custom phrases. This is required to ensure that any phrase changes in the current version of Smooth Operator are not overwritten.

Only 8 kHz phrases are supported in for Octel 50. If you are upgrading from a system that uses 6 kHz phrase files, the SO3-D2.* phrase file is overwritten and you must rerecord all customized system prompts, mailbox greetings, and V-Tree prompts.

5. Copy the \CVR1 directory to another installed hard drive, to the same hard drive, to disks, or to a backup device such as a tape backup. To copy the \CVR1 directory to another directory on the same hard drive, for example:
 - a. From the \CVR directory prompt, type `CD\CVR1` then press <ENTER> to change to the \CVR1 prompt.
 - b. From the \CVR1 directory prompt, type `XCOPY *.* C:\CVR1OLD` then press <ENTER>.
 - c. When prompted whether CVR1OLD specifies a directory or a file, type `D` then press <ENTER> to accept. Write down the name of the backup directory you created (in this example, CVR1OLD) below.

Backup CVR1 Directory Name: _____

6. Copy the AUTOEXEC.BAT and CONFIG.SYS files on the root of PC's boot drive. To copy the files to disk, for example:
 - a. Insert a disk in the disk drive.
 - b. From the C:\ prompt, type `COPY AUTOEXEC.BAT A:` then press <ENTER>. The AUTOEXEC.BAT file is copied to the A: drive.
 - c. From the C:\ prompt, type `COPY CONFIG.SYS A:` then press <ENTER>. The CONFIG.SYS file is copied to the A: drive.

7. To verify the integrity of the existing Smooth Operator system database, run Quick Assist in Verify mode. For additional information on running Quick Assist, see Chapter 12, "Maintaining the System," in the *Installation Guide*. If Quick Assist recommends you run the Update All option, contact a technical support representative before continuing.
8. From the \CVR prompt, type `EDIT RUNSMO3.BAT` then press <ENTER> to edit the RUNSMO3.BAT file. The DOS Editor window displays the contents of the RUNSMO3.BAT file.
9. Under the @ECHO OFF line, insert the line:

```
IF EXIST \CVR\RECOVER.FLG DEL \CVR\RECOVER.FLG
```
10. Under the SMOOTHX OPERATOR line, insert the line:

```
ECHO THIS IS A RECOVERY TEMPORARY FILE (RUNSMO3.BAT) .  
>\CVR\RECOVER.FLG
```
11. Press <F10>. You are prompted whether you want to save the file.
12. Press <Y> to select Yes and save the changes. The Main Menu displays.
13. Press <ENTER> to select Edit File. A File Name dialog box displays.
14. Type `DOW.BAT` and press <ENTER>. The contents of the DOW.BAT file displays.
15. Under the @ECHO OFF line, insert the lines:

```
IF EXIST \CVR\BACKUP.FLG DEL \CVR\BACKUP.FLG  
IF NOT EXIST \CVR1\BACKUP MD \CVR1\BACKUP  
CD \CVR1\BACKUP  
FOR %%1 IN (*.*) DO ATTRIB -R %%1  
FOR %%1 IN (*.*) DO DEL %%1  
CD \CVR  
ECHO THIS IS A BACKUP TEMPORARY FILE (DOW.BAT) . >BACKUP.FLG
```
16. Press <F10>. You are prompted whether you want to save the file.
17. Press <Y> to select Yes and save the changes. The Main Menu displays.
18. Press <Q> to select Quit Editor. The \CVR prompt displays.

Upgrading to Octel 50

The Octel 50 software is contained on a set of high-density disks.

To upgrade to Octel 50:

1. If the Smooth Operator system is **not** running, proceed with step 2. If the Smooth Operator system is running:
 - a. If the Mailbox Status screen is open and the Exit button is highlighted, press <ENTER>. The Mailbox Status screen closes and the menu bar is activated with the File menu highlighted.
 - b. Press <ALT+F> to view the File menu options.
 - c. From the File menu, use the down arrow key to select Exit, then press <ENTER>. The Shutdown System dialog box displays.

- d. Select Shutdown, then press <ENTER>. The system shutdown completes and the \CVR prompt displays.
2. Press <CTRL+ALT+DEL> to reboot the PC.
3. When the menu to run Octel 50, run Setup, or return to DOS displays, press 3 to Return to DOS.
4. Insert Octel 50 disk 1 into the disk drive.
5. Type `A:INSTALL` then press <ENTER>. An information screen appears that briefly describes the installation procedure.
6. Read the contents of the screen then press any key to continue. A dialog box describing proposed changes to the AUTOEXEC.BAT and CONFIG.SYS files displays.
7. Press <Y> if you want the AUTOEXEC.BAT and CONFIG.SYS files to be automatically modified during installation. Press <N> if you do not want the files to be automatically modified.

If you have edited the AUTOEXEC.BAT or CONFIG.SYS files since DOS installation, it is recommended you press <N>. If you press <N>, when the installation is complete, you must compare the AUTOEXEC.BAT and CONFIG.SYS files against the samples provided in this section under Confirm the AUTOEXEC.BAT, CONFIG.SYS and RUNSMO3.BAT Files. If there are any lines in the sample files that must be added to the files on the Octel 50 PC, you must manually edit the files to include the missing lines.

8. A dialog box displays asking whether you will be using the Fax Solution (an optional module that enables access to the fax mail and fax retrieval features:
 - Press <Y> if the system will be using the Fax Solution module for fax mail and fax retrieval.
 - Press <N> to select No if the system does not have the Fax Solution module. If you select <N>.
9. If more than one hard drive is detected, you are prompted to select the drive to which the Octel 50 files should be installed. A list of all local fixed drives is displayed. (Drives A and B are usually disk drives.) Highlight the drive onto which you want to install the system, then press <ENTER>.
10. The system prompts you to enter the total amount of memory in the computer. Highlight an option, then press <ENTER>.
11. The system prompts you to enter the number of voice ports installed. Enter the number of ports on the system, then press <ENTER>.
12. The system displays a list of supported voice boards. Highlight the model of voice board installed in the PC and press <ENTER>. If a DIALOG/4 board is installed, select D/4xD.
13. If you selected <Y> in step 8, the system prompts you to enter the number of fax ports installed on the system. Enter the number of ports and press <ENTER>.
14. The system prompts you to select the hardware interrupt level of the voice boards. You set the hardware interrupt for the voice boards when you installed the boards. Select the interrupt, then press <ENTER>.

15. If you selected <Y> in step 8, the system prompts you to select the hardware interrupt level of the fax boards. You set the hardware interrupt for the fax boards when you installed the boards. Select the interrupt and press <ENTER>.
16. The system prompts, "Do you want to install the Octel 50 program files?" Press <Y>.
17. A dialog box displays describing the installation process and informing you that if identical filenames are detected on the hard disk and the installation disk, you are prompted whether to overwrite the file. Press any key to continue.

If a message does display during installation about identical filenames, **select No to retain the existing files**. If you select Yes, the existing files are overwritten with system default files.

During file installation, the screen displays two boxes. The top box indicates the files that are being read from the disk and written to the hard drive. The bottom box indicates the status of each file being read or written to and the overall installation status.

18. As prompted by the system, replace installation disks, then press any key.

If you are upgrading a Rhetorex system from version 3.1, a dialog box displays informing you that the TONETAB1 file, if being used, has been renamed to COMPASS.TON, and recommending that you run CCA to use fax mail or detect fax tones.

19. The system prompts, "Do you want to put the voice files in a RAMdisk?" It is recommended that you use a RAMDrive if you have more than 2 MB of RAM on the system. Press <Y> for Yes or <N> for No.

When the system creates a RAMDrive, it uses 1 MB (1024K) of extended memory to store the SO3-ALL.VOX or SO3-ALL.VAP voice file.

20. If you press <Y>, you are prompted to enter the drive of the RAMDrive. The system notifies you if the RAMDrive you specify does not exist.

If the message and fax directories do not already exist, the system automatically creates 10 directories needed to store messages and greetings: \REC00 through \FAX00 through \FAX09, are also created.

21. The system prompts, "Do you want to install the SMDI utility?" Select <Y> for Yes or <N> for No.
22. If you press <Y> to install the SMDI utility, the Integrate Switch dialog box displays. For information on installing the SMDI utility, see Chapter 5, "Running the SMDI Utility," in the *Installation Guide*.
23. The Configure Dial Plan dialog box displays. If you want to run Dial Plan now, select OK. For information on running Dial Plan, see Chapter 6, "Configuring Dial Plan," in the *Installation Guide*.
24. If old dial plan data exists, you must indicate whether the system is to load the old numbers. Select <Yes> or <No> to continue.
25. When you exit Dial Plan, a dialog box displays informing you that the system is now installed. Remove the disk from the disk drive, then press any key to continue.

26. If you selected <Y> in step 7 to modify the AUTOEXEC.BAT and CONFIG.SYS files, a message displays that the PC will automatically reboot after the installation is complete. Press any key to continue.

If you selected <N> in step 7 to **not** modify the AUTOEXEC.BAT and CONFIG.SYS files, you are prompted to make any changes manually by checking the .EXM files. Press any key to continue.

27. The Configuration Utility main screen displays.



28. If the Conversion button is highlighted, select it. The Conversion dialog box displays. If the Conversion button is **not** highlighted, skip to step 31.
29. Select V-Tree update. The system automatically converts any existing V-Trees created over the phone interface for use with Visual V-Trees.
30. Select Exit on the Conversion dialog box. The existing database is automatically converted for use with the current version of Octel 50. When the conversion is complete, a Conversion Complete dialog box displays.
31. Select OK. The Configuration Utility dialog box displays again.

If you are upgrading a system already integrated with the switch, and you do not need to install a new switch, you do not need to rerun the Integrator utility.

32. Select Setup from the Configuration Utility dialog box. The System Setup dialog box displays. For information on running System Setup, see Chapter 8, "Setting Up the System," in the *Installation Guide*.
33. When you exit Setup, the Configuration Utility dialog box displays. To close the Configuration Utility dialog box, press <TAB> to select Exit and press <ENTER>.
34. If you chose <Y> in step 7 to automatically modify the AUTOEXEC.BAT and CONFIG.SYS files, the system automatically reboots.
- If you chose <N> in step 7 to **not** automatically modify the AUTOEXEC.BAT and CONFIG.SYS files, you are prompted to make any changes manually by checking the .EXM files, then reboot the system by pressing <CTRL+ALT+DEL>.
35. Once the system reboots, a menu with options to run Octel 50, run Setup, or return to DOS displays.

If you installed new Rhetorex voice boards, and you do not have the boards configured at the defaults (such as the first board set to a port address of 300), you must run the Configure utility before you attempt to run Octel 50. Press <3> to return to DOS from the menu that displays when Octel 50 installation is complete. For information on running the Configure utility, refer to Running Configure for Rhetorex Boards in the Installing the Octel 50 Software section.

36. Press <1> to run Octel 50.
37. You are prompted to run call analysis. This option is always displayed the first time you reboot the system after an installation. It is recommended that you press <Y> to run call analysis. For information on running call analysis, see Chapter 9, "Defining Phone System Signals," in the *Installation Guide*.
38. When you exit call analysis, Octel 50 launches, and the Octel 50 main screen displays. If the Octel 50 system does not launch, contact a technical support representative.
39. Shut down the Octel 50 system:
 - a. If the Mailbox Status screen is open and the Exit button is highlighted, press <ENTER>. The Mailbox Status screen closes and the menu bar is activated with the File menu highlighted.
 - b. Press <ALT+F> to view the File menu options.
 - c. From the File menu, use the down arrow key to select Exit, then press <ENTER>. The Shutdown System dialog box displays.
 - d. Select Shutdown, then press <ENTER>. The system shutdown completes and the \CVR prompt displays.
40. Press <CTRL+ALT+DEL> to reboot the PC. Once the system reboots, a menu with options to run Octel 50, run Setup, or return to DOS displays.
41. Press <1> to run Octel 50. The Octel 50 launches, and the Octel 50 main screen displays.

Defining an Alternate Rhetorex Board Configuration

If you installed Rhetorex voice boards, and you do not have the boards configured at the defaults (such as the first board set to a port address of 300), you must run a configuration program before you attempt to run Octel 50.

To run the Rhetorex Configure program:

1. From the \CVR prompt, type `CONFIGUR` and press <ENTER>. The Configure dialog box displays.
2. Use the function keys listed in the menu at the bottom of the dialog box to select the area you need to modify.
3. Use the up and down arrows to highlight the parameter to be changed.
4. Edit the highlighted parameter and press <ENTER>.
5. When you are done making modifications, press <F10> to return to the main menu.

6. From the main menu, press <F10> to exit. You are prompted to save the changes.
7. Press <Y> for yes. The \CVR prompt displays.
8. Press <CTRL+ALT+DEL> to reboot the PC.

Octel 50 Program Changes

The following technical program changes are incorporated into Octel 50 Version 4.0. These changes were made in Smooth Operator 4.0.

New features and functionality

The following new features and functionality are in Octel 50 4.0:

- Year 2000 support—Octel 50 is millennium-compliant.
- Automatic Data Recovery—A new utility that helps prevent the loss of messages and other Octel 50 system data when an unprotected loss of power causes an abnormal system shutdown.
- ViewSent Utility—A new utility program that enables you to view the features currently supported on the sentinel.
- A&D tone support for Toshiba switches.
- Mitel enhanced handset mode support.

Feature enhancements

The following feature enhancements have been included in Octel 50 4.0:

- Improved event file handling, which helps the program to execute more efficiently
- Improved message waiting light functionality, which results in more accurate representation of new message queue status
- Improved call flow functionality, which helps to ensure prompts and greetings are voiced as they should be (see the heading at the end of this document for specific changes)
- Improved V-Edit functionality

Call Flow Changes

The table shown below details changes made to the prompts that are voiced under specific call handling conditions for Octel 50 4.0. These changes were made in Smooth Operator 4.0. Call handling is specified for each mailbox on the Subscriber Settings dialog box. It can be modified by each mailbox owner through the subscriber phone interface.

Call Blocking Option set to:	No Answer/Call Blocking Option set to:	Busy Options set to:	In Releases Prior to 4.0:	With Release 4.0
Active	Default	Optional 1	During a Busy condition, callers erroneously heard a beep to begin recording instead of the Busy menu.	During a Busy condition, callers hear the Busy menu. If they select the option to go to voice mail, Optional Prompt 1 is voiced.
Active	Optional 1	Optional 1	During a Busy condition, callers erroneously heard the Busy menu, instead of Optional Prompt 1.	Callers hear Optional Prompt 1.
Inactive	Optional 1 or Optional 2	Optional 1	When transferred to voice mail, callers erroneously heard the Personal Greeting instead of Optional Prompt 1 or 2, as defined in the Subscriber Settings.	Callers hear Optional Prompt 1 or 2, as defined in the Subscriber Settings.
Active	Optional 1 or Optional 2 or V-Tree	Default	If callers pressed <#><#> and then the extension number to reach the extension, the system voiced the Personal Greeting instead of Optional Prompt 1 or 2 or the V-Tree, as defined in the Subscriber Settings.	Callers pressing <#><#> and then the extension number to reach the extension hear Optional Prompt 1 or 2 or the V-Tree, as defined in the Subscriber Settings.