Lucent Technologies
Bell Labs Innovations

# Octel 100 Release 3.1
# Installation Checklist

Use this form to monitor your progress as you complete each step necessary to install, set up, and test an Octel 100 installation. Information on completing each step is detailed in the *Implementation and Service Manual*.

If you are upgrading an existing system to Octel 100 Version 3.1, follow the appropriate upgrade procedure in the upgrade note you received with the software.

There are two sections to this checklist:

- Tasks that must be completed before you go to the customer site
- Tasks that must be completed at the customer site to set up and configure the Octel 100 system. It is very important that you complete all relevant tasks at the customer site in the order that they are listed. Failure to do so may result in the Octel 100 system not functioning properly.

Place a check next to each task as it is completed.

**Site:**_____

## Before Going to the Customer Site:

_____ Determine the customer's system needs and gather customer information (from the Customer Needs Worksheets and the Preinstallation Configuration Worksheets).

_____ Assemble the required materials:

- _____ Completed Preinstallation Configuration Worksheets
- _____ Assembled PC, including:
  - _____ CPU (Memory, hard disk, and any necessary boards are already installed)
  - _____ CPU power cord
  - _____ Monitor
  - _____ Monitor power cord
  - _____ Monitor-to-CPU cord
  - _____ Keyboard
  - _____ Mouse
- _____ Octel 100 Implementation and Service Manual, System Manager Manual, Quick Reference Guides, Wallet Cards, Release Notes
- _____ Configuration Note for the customer's switch
- _____ Sentinel
- _____ UPS (may be provided or is optional)
- _____ Tape Backup, software, and manual (optional)
- _____ Printer and cable (optional)
- _____ Butt set
- _____ Ground strap
- _____ Modular cables (4-connector)

_____ For advanced trouble isolation:

- _____ Digit grabber (The PHD Telecommunicator from Ziad is recommended. Call (614) 464-1900 for more information on this butt set and digit grabber product.)
- _____ Line simulator

## At the Customer Site:

Refer to the document titled “PC Specification Sheet,” provided with the messaging system PC, when completing the steps to connect the Octel 100 PC.

_____ Open the boxes containing the Octel 100 system and remove the equipment.

_____ Connect the monitor to the PC and plug the power cord into the UPS, if provided, or into an electrical outlet.

_____ Verify phone system readiness (see Chapter 5, “Preparing the Hardware,” in the *Implementation and Service Manual*).

_____ Install the Sentinel to the Octel 100 PC’s parallel port (see Chapter 5, “Preparing the Hardware,” in the *Implementation and Service Manual*).

_____ Connect the phone and fax lines (see Chapter 5, “Preparing the Hardware,” in the *Implementation and Service Manual*).

_____ Install the Serial Integration Device, if necessary (see the Configuration Note for the phone switch).

_____ Connect the UPS serial connection to COM1 (if provided; otherwise, it is optional).

_____ Connect the internal modem (if one is installed in the PC) to the switch or an outside line.

_____ If Visual Mailbox is being implemented with Octel 100, connect the network connection cable or jack into the Network Interface Card installed in the PC.

_____ Install any optional equipment provided (for example, tape backup unit, printer).

_____ Attach the power cord to the PC and plug the power cord into the UPS, if provided, or into an electrical outlet.

_____ Turn on power to the PC and wait for Octel 100 to launch. Depending on your system’s configuration, you may be prompted to run Call Analysis. See Chapter 8, “Defining Phone System Signals,” in the *Implementation and Service Manual* to determine if you need to run Call Analysis.

_____ Shut down Octel 100 (see Chapter 20, “Starting, Logging Into, and Shutting Down the System,” in the *Implementation and Service Manual* for Octel 100 shutdown procedures).

_____ If a UPS is supplied with Octel 100, remove the UPS power cord from the electrical outlet and verify that the PC continues to run (the UPS will beep to indicate that it is supplying power to the PC). If the PC turns off when you remove the UPS power cord from the electrical outlet, verify that the UPS is connected properly. If the UPS is connected properly, contact a technical support representative.

_____ Verify that the PC is set to the correct time:

_____ From the OS/2 desktop, click the OS/2 window icon in the LaunchPad to open an OS/2 window.

_____ From the C: prompt, type TIME and press <ENTER>. Verify that the correct time is displayed:

- If the time displayed is correct, press <ENTER>.
- If the time displayed is not correct, enter the correct time in HH:MM format and press <ENTER>.

Type EXIT and press <ENTER> to close the OS/2 window.

_____ Open the Octel 100 folder, double-click the Integrator icon and verify that the proper switch is listed in the Currently Installed Switch field. If the correct switch is installed, exit Integrator. If an incorrect switch is installed, run Integrator to install the correct switch. See Chapter 8, “Integrating with the Phone System,” in the *Implementation and Service Manual*.

_____ Double-click the System Setup icon in the Octel 100 folder and complete the following steps (see Chapter 13, “Setting Up the System,” in the *Implementation and Service Manual* for information on running the System Setup utility):

- _____ On the General Parameter tab, set the Number of Digits in a Mailbox parameter.
- _____ On the Operator tab, set the Default Operator Mailbox Number parameter.
- _____ If the system is using fax and you used the transfer method to connect the fax lines, on the Fax Extensions Parameter tab, enable the Transfer to Extensions parameter and identify the extension connected to the fax channels.
- _____ Configure other System Setup settings as required.

_____ If a UPS is supplied with Octel 100 for UPS integration, edit the STARTUP.CMD file, locate the line REM START /PM /MIN UPS.EXE, remove the REM and then save and exit the file. See Chapter 6, “Installing the Software,” in the *Implementation and Service Manual* for information on opening the STARTUP.CMD file.

_____ If the phone switch requires serial integration, run the Serial Integration utility. See the switch Configuration Note to determine whether serial integration is required. See Chapter 10, “Establishing a Serial Integration,” in the *Implementation and Service Manual* for information on running the Serial Integration utility.

_____ If the Octel 100 system is using network messaging or fax retrieval, you may need to identify the local area code and associated prefixes. See Chapter 12, “Determining Outdial Strings,” in the *Implementation and Service Manual* for information on running the Dial Plan utility.

_____ If Visual Mailbox is being implemented with Octel 100, you must see the following topics in Chapter 19, “Installing and Configuring Visual Mailbox,” in the *Implementation and Service Manual* to complete the Visual Mailbox implementation:

- _____ Working with LAN Administrator to Configure the LAN—the site's LAN Administrator must provide information on the site's network.
- _____ Installing the Voice Fax Software on the PC—under Installing the Voice Fax Server on the System PC, you must enter the site-specific information required on the Server tab in System Setup, and you must complete the steps under Configuring the System Software.
- _____ Installing the Client Software on the LAN Server.
- _____ Installing Visual Mailbox on Client PCs.
- _____ Edit the RUNVM.CMD file, locate the line that contains CALL START /MIN RUNVFS.CMD. If REM appears at the start of the line, remove the REM then save and exit the file. See Chapter 6, “Installing the Software,” in the Implementation and Service Manual for information on opening the STARTUP.CMD file.

_____ Double-click the Octel icon in Octel 100 folder to launch the messaging system.

_____ Set up the system’s prompts, business hours, and Automated Attendant. See Chapter 14, “Setting Up System Prompts,” in the *Implementation and Service Manual* and the Preinstallation Configuration Worksheets.

_____ Edit the system’s classes of service as required. See the topic, “Class of Service Options,” in Chapter 16, “Managing System Mailboxes,” in the *Implementation and Service Manual*. See the completed Class of Service Sheet, COS Redefinition Sheet, and Custom COS Definition Sheet if the COS defaults are being modified for the Octel 100 system.

_____ Create subscriber mailboxes and set up any required features, such as Message Notification and Call Queuing. See Chapter 16, “Managing System Mailboxes,” in the *Implementation and Service Manual* and the completed Preinstallation Configuration Worksheets.

_____ Test the system (see Chapter 24, “Troubleshooting the System,” in the *Implementation and Service Manual*).

_____ If an RSM Manager license was purchased, you must install the Manager and you must configure the RSM Client to recognize the Manager. See the topic, “Installing the Remote Services Management Software,” in Chapter 6, “Installing the Software,” in the *Implementation and Service Manual*.” Step 58 of the procedure, “To install and configure the RSM Client on the system PC,” provides information on configuring the Client to recognize a Manager. The procedure, “To install and configure the RSM Manager software,” provides information on installing and configuring an RSM Manager.

_____ Complete the Security Checklist provided in Chapter 23, “Maintaining the System,” in the *Implementation and Service Manual*.

_____ Document site and installation information:

- _____ Record system setup on the System Configuration Record.
- _____ Complete the Site Contact Information Sheet.

_____ Photocopy all worksheets generated during the installation for storage behind the Implementation Information Tab in the *System Manager Manual*.

_____ Store all worksheets and notes generated during the installation behind the Customer Information Tab in the *Implementation and Service Manual*.