



TECHNICAL BULLETIN

Procedure for upgrading from 8.2 to 8.5 when COS Mailbox configuration has been changed

Date: March 26, 2014

Bulletin # CXP-10716

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APPLIES TO

Product	Versions
CX-E	8.20
CX-S	8.20

DESCRIPTION

Procedure for upgrading systems from 8.20 to 8.50 when configuration changes have been made to Class of Service (COS) Mailboxes.

SOFTWARE REQUIREMENTS

This procedure applies to systems upgrading from v8.20 to 8.50

UPGRADE PROCEDURE

CX 8.5 has split the functionality of the previous single COS mailbox into two independent mailboxes: the Mailbox COS and the Availability COS. The upgrade to CX 8.5 from a prior version such as CX 8.2 will convert any existing COS mailboxes to one of these two types.

The CX 8.2 product shipped with two Class of Service mailboxes configured for use as Availability COS Templates. These are named 'Office-Basic Template' and 'Office-Advanced Template'. Typically, for a 4 digit system, these mailboxes would have numbers 8001 and 8002. While these mailboxes were not intended to be used for non-Availability Class of Service functionality for Subscriber mailboxes, there was nothing preventing an Administrator from using them in this manner. If used in this manner, it is possible to lose non-Availability functionality after an upgrade since these will likely be converted into CX 8.5 Availability COS mailboxes instead of potentially intended CX 8.5 Mailbox COS mailboxes.

Follow the instructions below before upgrading in order identify whether the system is at risk and the steps to avoid this loss of data.

WARNING Failure to follow the procedures in this document for identifying subscribers potentially at risk could result in a loss of functionality for those users.

IDENTIFY WHETHER THE SYSTEM IS AT RISK

1. First identify the mailbox numbers assigned to the 'Office-Basic Template' and 'Office-Advanced Template' from the standard database or any manually created Class of Service mailboxes for Availability, as shown in **Figure 1**.

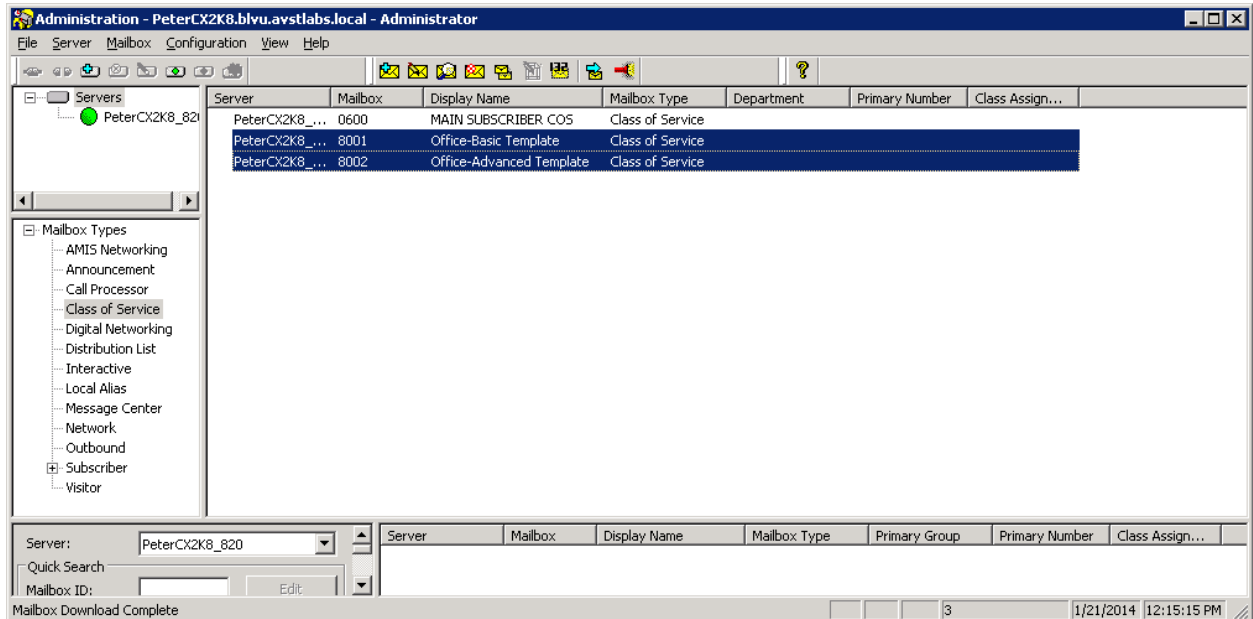


Figure 1: Identifying the Standard Database Class of Service mailboxes used for Availability

2. For each of the identified mailboxes, determine whether they are being used for normal Class of Service functionality. The easiest way to determine this is to sort on the 'Class Assignment' column in the Administration mailbox list as shown in **Figure 2**, since it shows all assignments in one list. Look in the Class Assignment column for a mailbox number that matches either the Office-Basic Template or the Office-Advanced Template.

Alternately, each of the identified Class of Service mailboxes can be opened to show the 'Subscriber Member' list as shown in **Figure 3**. If these mailbox numbers do not appear in the 'Class Assignment' column or the 'Subscriber Member' list is empty, **the Class of Service mailboxes are not at risk and you can proceed with the upgrade to CX 8.5.**

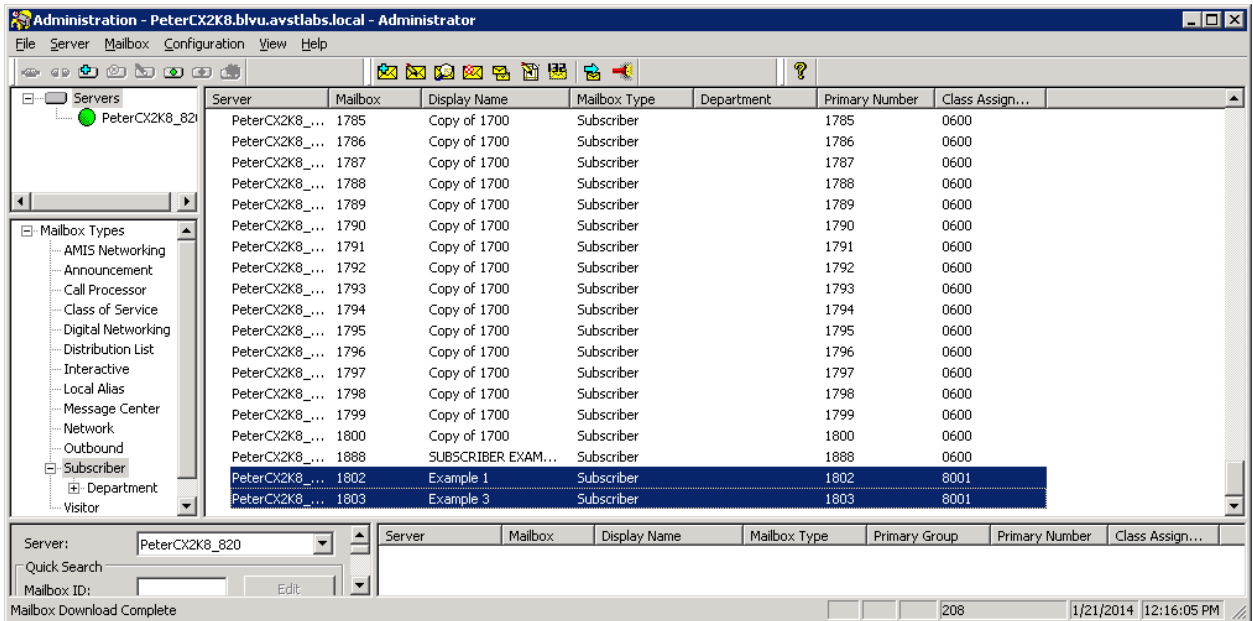


Figure 2: Identifying the users of the “at Risk’ Class of Service mailbox using the mailbox List.

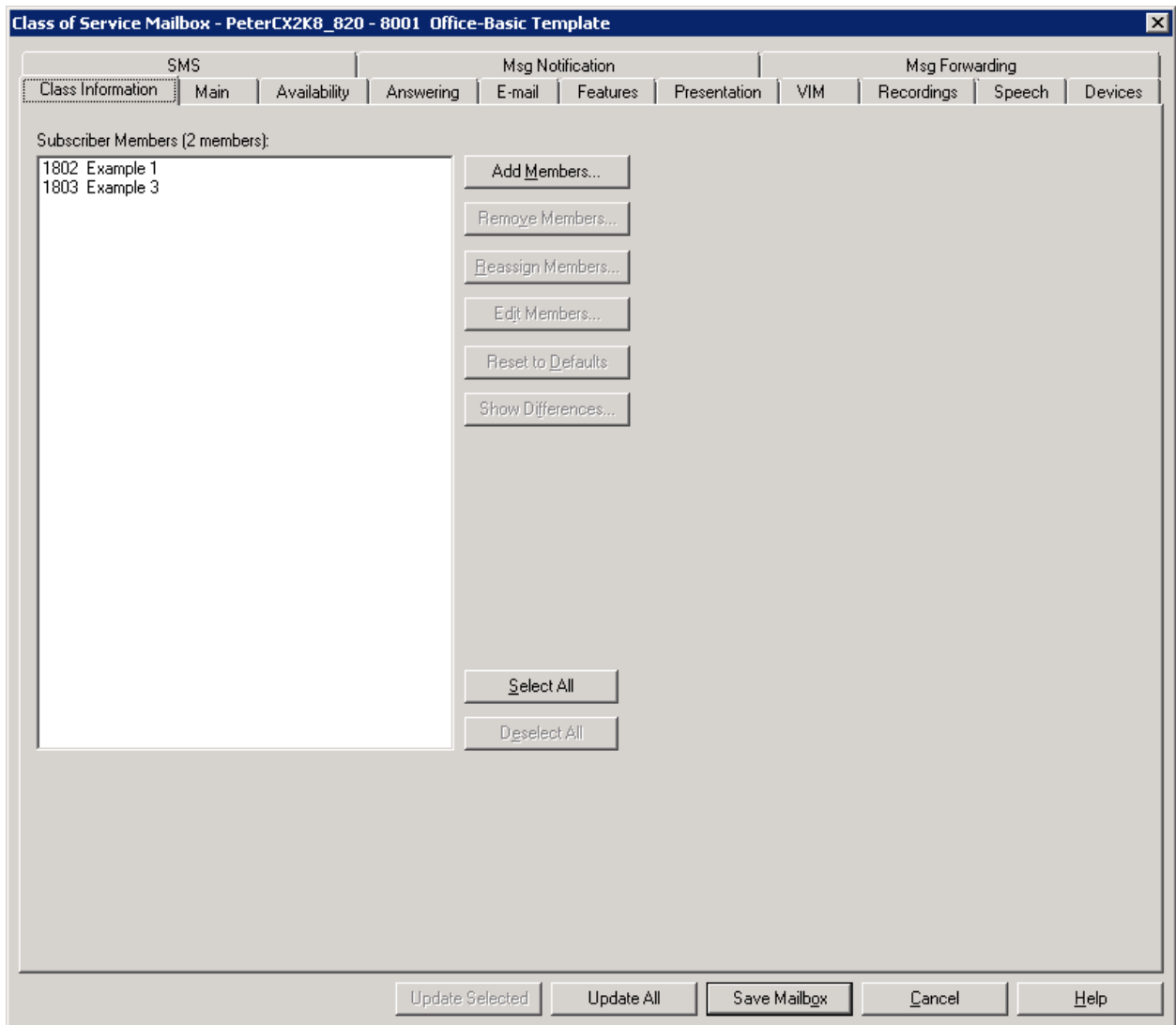


Figure 3: Identifying the users of the Class of Service mailbox through the ‘Subscriber Member’ list.

For each mailbox number in use as a normal Class Assignment, you need to determine if it is also being used for Availability. This is most easily done by looking for references.

1. In the Administration client, select ‘Mailbox-References...’ to open the ‘Mailbox Reference’ dialog.
2. Enter the number of a Class of Service mailbox that appeared in the Class Assignment column above.
3. Select ‘Search’. If the mailbox does not have any ‘Availability Auto Build Source’ references in the ‘Reference As’, this Class of Service mailbox is not at risk.

- When all identified COS mailbox numbers have been checked and none are found to have 'Availability Auto Build Source' in the 'Reference as' column, the Class of Service mailboxes are not at risk and you can proceed with the upgrade to CX 8.5.

For any Class of Service mailbox that is referenced as 'Availability Auto Build Source' as shown in Figure 4 below, the reference must be removed or the reference must be changed to a replacement Class of Service mailbox.

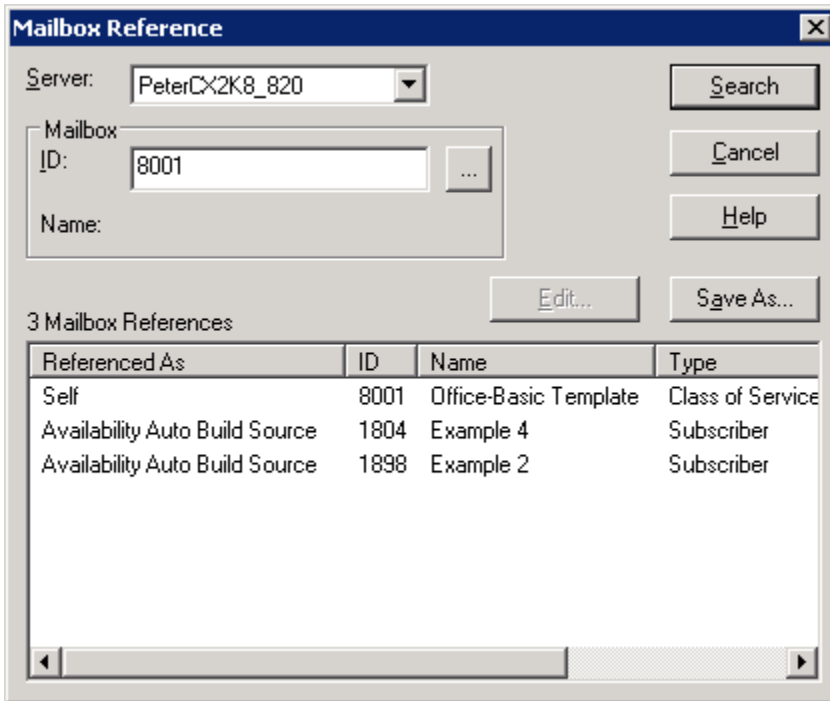


Figure 4: Identifying the Availability users of the Class of Service mailbox through Mailbox Reference

- If the desire is to continue to use both the Availability functionality and the non-Availability functionality (normal COS) of the Class of Service at risk, the mailbox must be split into two and references must be changed.
- If the desire is to use only the non-Availability functionality (normal COS) of the Class of Service mailbox, then all 'Availability Auto Build Source' references must be removed.
- If the desire is to use only the Availability functionality (normal COS) of the Class of Service mailbox, then nothing needs to be done since the current upgrade will convert these Class of Service mailboxes into Availability COS mailboxes.

Removing or changing the 'Availability Auto Build Source' references can be tedious. Unless a range of mailboxes can be altered, removing or changing the references requires each Subscriber mailbox using the Class of Service mailbox for Availability to be opened individually.

An easier solution is to simply make a new Class of Service mailbox for non-Availability Class of Service usage. That approach involves the following steps.

1. In the Administration client highlight the identified Class of Service mailbox.
2. Select 'Mailbox-Copy' and a copy of the original will appear.
3. Enter and record a mailbox number and name appropriate for a non-Availability Class of Service mailbox.
4. Save the mailbox.
5. Open the originally identified Class of Service mailbox.
6. Press 'Select All' which will highlight all current members.
7. Press 'Reassign Members'
8. In the dialog that appears, select the newly copied Class of Service made above and press 'OK'
9. Confirm the decision to reassign and the Subscriber Member list should be empty.
10. Press 'Save Mailbox'
11. Open the new Class of Service mailbox and verify that the Subscriber mailboxes are now members of the new Class of Service mailbox.
12. Click on the Main tab and make sure that the Personal Assistant checkbox is selected
13. Click on the availability tab.
14. Ensure that the Allow and Enable Availability Processing boxes are checked.
15. Click on the Weekly tab in the bottom area of the window. Set all of the Day drop-down boxes to "none".
16. Click on the Daily tab in the bottom area of the window.

17. Delete all of the entries from the Standard Daily Schedule list.
18. Repeat the previous two steps for the Presence and Call Lists tabs.
19. Uncheck the Enable Availability Processing and Allow boxes, in that order.
20. Click the Save Mailbox button

Repeat the above steps for each Class of Service identified to be at risk earlier.

After the above steps have been completed for each at risk Class of Service mailbox, the Class of Service mailboxes are no longer at risk and you can proceed with the upgrade to CX 8.5. Following the upgrade, the original mailboxes will be converted into CX 8.5 Availability COS mailboxes and the mailbox copies will be converted into CX 8.5 Mailbox COS mailboxes.

FOR MORE INFORMATION

For any pre-sale questions regarding the CX-Series or Repartee applications, please contact AVST Sales Engineering at 949.699.2300 or email SalesEngineering@avst.com. For questions regarding installation and implementation, please contact AVST Technical Support:

CX-E and CX-S support: via phone 800.777.2403 or email CXsupport@avst.com
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