

# Compunetix RSB

## Installation Verification Checklist

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Installation Engineer: \_\_\_\_\_

Installation Engineer  
Signature: \_\_\_\_\_

Installation Pictures taken (unless prohibited by customer)

## System Components

The customer's system consists of the following components:

### Required Test Equipment

- CONTEX Summit or Summit Olympus
- RSB
- Web browser
- WOC

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# Installation Test Procedures

FEATURE	RESULT
<b>1 RSB Web page</b>	
<p><b>1.1 Webpage</b></p> <p>Open a web browser. Navigate to the RSB URL. Verify that the RSB 5 login page appears.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>1.2 Forgotten Password</b></p> <p>Click the Forgot your password? Link and verify that you receive the appropriate prompts to recover OR the appropriate message indicating that resetting passwords has been disabled.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>1.3 Login – System Admin</b></p> <p>Login to the system as an administrator and verify that any messages are displayed at the top of the window and the Common Tasks are shown including: View Active Users, New Virtual Bridge, and New Physical Bridge.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p><b>1.4 Login – Operator</b></p> <p>Login to the system as an administrator and verify that any messages are displayed at the top of the window and the Common Tasks are shown including: My Reservations, My Events, and New Reservation.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>1.5 Login – Event Operator</b></p> <p>Login to the system as an administrator and verify that the Reservation list is displayed by default with a calendar in the lower left corner of the window with the correct date selected.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>1.6 Login – Account Admin</b></p> <p>Login to the system as an administrator and verify that any messages are displayed at the top of the window and the Common Tasks are shown including: My Accounts, My Users, My Bills, New Subaccount and New User.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>

<p><b>1.7 Login – End User</b></p> <p>Login to the system as an administrator and verify that any messages are displayed at the top of the window and the Common Tasks are shown including My Calendar, My Reservations, and My Bills.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<b>2 Accounts</b>	
<p><b>2.1 Create New Account</b></p> <p>Navigate to the Accounts section of the RSB. Create a new sub account to the Master account. Verify that the account appears in the Account list.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>2.2 Edit Account - Basic</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Basic tab. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p><b>2.3 Edit Account – Sub Accounts</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Sub Accounts tab by adding a new subaccount, editing a sub account and deleting a sub account. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>2.4 Edit Account - Users</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Users tab by adding a new user, editing a user, viewing a user and deleting a user. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>2.5 Edit Account - Contacts</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Contacts tab by adding an Ad Hoc contact. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>

<p><b>2.6 Edit Account – Address Book</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Address Book tab by adding a person and viewing a person. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>2.7 Edit Account – Conference Template</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Conference Template tab. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>2.8 Edit Account – Preset Groups</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Preset Groups tab by adding a preset group. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p><b>2.9 Edit Account - Notifications</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Notifications tab by editing a template and uploading a new one. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>2.10 Edit Account – Tax Info</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Tax Rate tab by adding a new tax rate, editing a tax rate, and deleting a tax rate. Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>2.2 Edit Account - Rates</b></p> <p>Edit the new Account made in step 2.1. Make changes to the information on the Rates tab by adding a new parent rate, Save the changes. Verify that the account now has the new settings.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>

<b>3 Users</b>	
<p><b>3.1 Create New Users</b></p> <p>Click the Users link along the left side of the RSB main window. Create a new user for each user level type. Logout of the RSB and login with each new user type. Verify that each user sees the correct interface options.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>3.2 Edit Users</b></p> <p>Click the Users link along the left side of the RSB main window. Edit an existing user for each user level type. Verify that the changes take effect.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>3.1 Delete Users</b></p> <p>Click the Users link along the left side of the RSB main window. Delete a user from the list and verify that they are removed from the User list. Logout of the RSB and attempt to login with the deleted user's credentials. Verify that you cannot login.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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### 4 Reservations

#### 4.1 One-time Reservation

Log into the RSB as an Operator.

Create a new one-time conference for the near future. Verify that the reservation is transferred to the WOC.

When appropriate, call parties into the conference to verify that the conference transferred correctly.

**Comments:**

- Pass**
- Fail**

#### 4.2 Repeating Reservation

Create a daily conference for the near future. Verify that the reservations within two days are transferred to the WOC. When appropriate, call parties into the conference to verify that the conference transferred correctly.

**Comments:**

- Pass**
- Fail**

#### 4.3 On-Demand Reservation

Create a passcode on-demand conference. Call parties into the conference to verify that the conference can be used on the Summit/Olympus.

**Comments:**

- Pass**
- Fail**

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<p><b>4.4 Event Reservation – One time</b></p> <p>Log into the RSB as an Event Operator.</p> <p>Create a new one-time conference for the near future. Verify that the reservation is transferred to the WOC.</p> <p>When appropriate, call parties into the conference to verify that the conference transferred correctly.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>4.5 Event Reservation - Repeating</b></p> <p>Log into the RSB as an Event Operator.</p> <p>Create a new repeating conference for the near future. Verify that the reservation is transferred to the WOC.</p> <p>When appropriate, call parties into the conference to verify that the conference transferred correctly.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>4.6 Validate Externally</b></p> <p>Create a passcode conference. Set the conference for Validate Externally. Call parties into the conference to verify that the conference can be used on the Summit/Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>

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<p><b>4.7 End User Reservation</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p style="text-align: center;"><b>5 Transfers</b></p>	
<p><b>5.1 Transfers - Reservations</b></p> <p>Click the Transfer link along the left side of the RSB main screen. Verify that the Transfer page containing two tabs: Reservations and DNIS is displayed. Verify that the Reservations transfer list is displayed by default and that it displays each Conference Name, timestamp, Bridge ID, Transfer Status and an Actions column with Edit and Retry listed.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>5.2 Transfers – Reservation Filter</b></p> <p>Verify that you can filter the Reservation Transfer list by Conference Name, Bridge, or Transfer status.</p> <p>Verify that you can reset the displayed list.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>

<p><b>5.3 Transfers - DNIS</b></p> <p>Click the DNIS tab and verify that the DNIS transfer list is displayed and shows DNIS, Bridge, State and Actions column.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>5.4 Transfers – DNIS Filter</b></p> <p>Verify that you can filter the DNIS Transfer list by DNIS number.</p> <p>Verify that you can reset the DNIS Transfer list to the original display.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>6 Billing</b></p>	
<p><b>6.1 Billing</b></p> <p>Click the Billing link along the left side of the RSB main screen. Verify that a page is displayed to enter a Conference Name, Bridge ID, Approval status and date range for billing records.</p> <p>Enter a starting and ending date then click the Search button. Verify that a list of Billing Records is displayed and that the list shows, Date, start time, conference name, billing code, Bridge ID, Approval Status and an Actions column with View, Edit and Delete displayed.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p><b>6.2 Billing - Editing</b></p> <p>Edit one of the billing records and verify that if the conference was not one that had a reservation that you are prompted to manually add the conference and reservation.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>6.3 Billing - Viewing</b></p> <p>Select one of the billing records and verify that you are able to view the details for the entry.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>6.4 Billing – View the G Report</b></p> <p>Select one of the billing records and verify that you are able to view the billing details. Select View G Report and verify that NO errors are displayed in the report.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>
<p><b>6.5 Billing – Generate R Report</b></p> <p>Verify that you can successfully generate an R report from approved billing records.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b></p>

<b>7 Reports</b>	
<p><b>7.1 Reports</b></p> <p>Click the Reports link along the left side of the RSB main screen. Verify that the Reports page is displayed and that it contains 3 tabs: Type, Variables and Report.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>7.2 Reports – Passcode Utilization</b></p> <p>From the Reports page, select Passcode Utilization and then click the Next button. Enter a starting and ending date range then click Next. Verify that the Passcode Utilization Report is displayed and lists Conference Names, date and time, duration, and Host and Guest passcodes for any passcodes being utilized in the selected date range.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>7.3 Reports – Reservations Summary</b></p> <p>From the Reports page, select Reservations Summary and then click the Next button. Select the date and then click Next. Verify that the Reservations Summary Report is displayed and lists Conference Names, type, duration, duration, number of ports in, out and unattended, and billing code for any reservations on the selected date.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p>7.4 Reserved vs. Scheduled Ports</p> <p>From the Reports page, select Reserved vs. Scheduled Ports and then click the Next button. Enter a starting and ending date range then click Next. Verify that the Reserved vs Actual Ports Report is displayed and shows a bar graph indicating the reserved ports in blue and the actual ports in reddish.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p>7.5 Schedule Summary</p> <p>From the Reports page, select Schedule Summary and then click the Next button. Enter a starting and ending date range then click Next. Verify that the Schedule Summary Report is displayed and lists scheduled conferences by date including Conference Names, date and time, duration, billing code, recording code and Host and Guest passcodes (if applicable) for conferences scheduled in the selected date range.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>

<p><b>7.6 Account Status Report</b></p> <p>From the Reports page, select Account Status and then click the Next button. Since there are no variables for this report click Next. Verify that the Account Status Report is displayed and lists all accounts including Account Number, Account Name and short name, status, date and time created, date and time changed and the station that last changed the account.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>7.7 On Demand Reservations Report</b></p> <p>From the Reports page, select On Demand Reservations and then click the Next button. Since there are no variables required for this report click Next. Verify that the On Demand Reservations Report is displayed and lists Conference Names, date and time created, date and time changed, Special Instructions, Account Charge Code, Host and Guest passcodes, additional ports required, record code and account number for all on demand reservations within the system.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>

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**8 Notifications**

**8.1 Pending Notifications**

Click the Notifications link along the left side of the RSB main screen. Verify that a list of Pending Notifications is displayed.

**Comments:**

- Pass**
- Fail**

**9 History**

**9.1 History**

Select the History link along the left side of the RSB main screen. Verify that a History list is displayed that shows date and time stamp for actions that have occurred within the system. Verify that you can see the Action and the station that created each action.

**Comments:**

- Pass**
- Fail**

**9.2 History - Filters**

Verify that you can filter the History list by Table, action and station.

**Comments:**

- Pass**
- Fail**

**9.3 History - Reset**

Verify that if you click Reset that the list is returned to the original view displaying all actions.

**Comments:**

- Pass**
- Fail**

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<b>10 Configuration</b>	
<p><b>10.1 Physical Bridges</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>10.2 Virtual Bridges</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>10.3 Config Parameters</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p><b>10.4 Blocked ANIs</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>10.5 Password Policies</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>10.6 Passcode Policies</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>10.7 Time Zones</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>

<p><b>10.8 Language Packs</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>10.9 DNIS Numbers</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>10.10 Custom Features</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>
<p><b>10.11 Billing Methods</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<input type="checkbox"/> <b>Pass</b> <input type="checkbox"/> <b>Fail</b>

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<p><b>10.12 Active Users</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>10.13 Database Cleanup</b></p> <p>Log into the RSB as an End User. Create a passcode conference. Call parties into the conference to verify that the conference can be used on the Summit/ Olympus.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p style="text-align: center;"><b>11 Email Notifications</b></p>	
<p><b>11.1 Email Confirmations</b></p> <p>Set up a reservation to receive an email confirmation and confirm that the email is received.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>
<p><b>11.2 Email Templates</b></p> <p>Set up a template and confirm that when the email is received it displays correctly.</p> <p><b>Comments:</b></p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><input type="checkbox"/> <b>Fail</b></p>