

# MiCollab Advanced Messaging 23.2

## MiCollab AM Notify

### Administration Guide

For version 23.2 and above

## Notice

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# Preface

This guide provides administration and configuration instructions for MiCollab AM Notify. For installation instructions, see the *MiCollab AM Notify Installation Guide*.

This guide is written for Mitel-certified administrators and technicians who are familiar with MiCollab AM Notify, MiCollab Advanced Messaging (MiCollab AM) procedures and terminology, and the Microsoft Windows® operating system.

Before implementing any procedures in this guide, ensure that MiCollab AM software is installed and running successfully.

## References

A catalog of technical documentation is included on the MiCollab AM Installation Media. If you are installing any advanced applications, such as Networking and Fax Server applications, you should refer to the appropriate technical documentation for application and installation information.

## Documentation

The technical documentation is produced in the PDF format and requires the PDF reader to view it. The MiCollab AM Documentation Library includes the following documents and resources:

- **Administration Documentation.** Available as a PDF only. Contains the following:
  - **Administration Guides.** Available as a PDF only. Contains administrative guides for administrators about how to manage and configure the messaging system.
  - **Quick Reference Cards (QRC).** Contains shortcuts and quick instructions telling subscribers how to access and use the messaging system.
  - **User Guides.** Available as a PDF only. Contains user guides for subscribers about accessing the messaging system and checking and sending messages.
- **Server Documentation.** Available as a PDF only. Contains the following:
  - **Developer Resources.** Contains programming guides and API references for developers for integrating the server clients and web applications with MiCollab AM.
  - **Installation and Configuration.** Available as a PDF only. Contains installation and configuration guides for server administrators about how to install and configure the messaging system.
  - **Integration Technical Notes (ITN).** Contains a set of guides that describe the integration methods and instructions for a variety of phone systems to work with MiCollab AM. The ITNs are generally used by resellers or administrators who are experienced with MiCollab AM and familiar with the integration procedures and terminology.



- **Spare Parts Documentation.** Contains a set of guides that describe the instructions for installing and configuring hardware parts to work with MiCollab AM. These documents are written for Mitel-certified MiCollab AM technicians who are experienced with MiCollab AM and familiar with the procedures and terminology.
- **Software Release Notice (SRN).** This notice introduces the new features, capabilities, and hardware/software requirements for the corresponding MiCollab AM version.

## Documentation Updates

Documentation updates may be available from the following sources:

- Mitel-certified technicians can view or download documents and program files from our partner web site: [www.mitel.com](http://www.mitel.com)

## Help

The primary source of information about MiCollab AM is the online help available within any of its administrative utilities. You can access **Help** by clicking the **Help** button in the dialog box or window in which you are working.

## Document Conventions

The following conventions are used in this document:

- **Key Names.** Names of keys on the keyboard are shown in a box.  
 | Example: **Enter**
- When two keys must be pressed simultaneously, they are joined by a + sign.  
 | Example: **Alt** + **Tab**
- **Reference to Document** Titles of other documents are shown in italics.  
 | Example: See the *System Installation and Configuration Guide*.
- **User Interface (UI) Element Names.** Names of UI elements such as dialog boxes, windows, screens, menu items, tabs, buttons, and icons are shown in bold.  
 | Example: On the **Startup** screen, click the **Start** icon.
- **User Input.** Information required to be typed is shown in italics.  
 | Example: Type the password *voicemail*.
- **Warning, Caution, Important, and Notes.** Text for the contents that require attention are shown as follows:

**WARNING** A warning paragraph advises you of circumstances that can result in the loss of data, harm to the MiCollab AM System Server platform, or personal harm.

**CAUTION** Failure to follow these recommendations can result in unauthorized access to the system and consequent loss of data.

**IMPORTANT** An important paragraph gives decision-making information or informs you of the order in which tasks need to be completed.

**NOTE** A note gives additional information, provides an explanation, or indicates an exception to the information in the preceding text.

# MiCollab AM Notify Overview

MiCollab AM Notify augments the MiCollab Advanced Messaging (MiCollab AM) system by providing the ability to send outbound notifications to a user-provided list of contacts via telephone calls, text messages, and MiCollab AM voice messages.

The application operates on a single MiCollab AM Call Server (or System and Call Server combination), and can work in conjunction with one or more UConnect Remote Servers dedicated to running UConnect Interactive Voice Response (IVR) scripts. Both single tenant and multi-tenanted MiCollab AM systems are supported.

Outbound calls are placed on MiCollab AM lines, and text messages are sent using SMS providers configured in the MiCollab AM system. The number of lines that can be used simultaneously is limited by the capacity of the MiCollab AM Call Server, and the number of ports for which the application is licensed.

Utilizing the MiCollab AM Notify [Data Interchange](#) methodology, notifications can be dynamically initiated by back-end data processes as well as via telephone using the MiCollab AM Notify telephone user interface (TUI).

In addition to initiating campaigns, the [Telephone User Interface Script](#) allows application administrators to record notification message phrases and perform certain system tasks using a touch-tone telephone.

MiCollab AM Notify supports multiple, diverse notification campaigns running concurrently. For example, MiCollab AM Notify can support both an appointment reminder campaign and an office closure notification campaign simultaneously. Configuration is accomplished using the [Application Administration](#) utility to create multiple [Control Sets](#), one for each type of campaign.

Outbound notification calls can utilize the [Standard Call Dialog](#), or take advantage of [Custom Menus](#) depending on campaign requirements. In addition, calls can be attempted to all recipients in a provided list or, using the [Result Tracking](#) feature, until a certain number of desired responses is received. Using [Dialog Sentences](#), notification messages spoken to call recipients can be comprised of a combination of recorded audio, data values, and text-to-speech content.

A real-time view of ongoing, scheduled and recently completed notifications is available via the [View Notifications](#) dialog. A separate utility is provided for generating [Results Reports](#) from notification output data.

## Requirements

- Properly configured system server platform running Windows Server 2012 R2, Windows Server 2016 (Server with Desktop Experience), Windows Server 2019 (Server with Desktop Experience), or Windows Server 2022 (Server with Desktop Experience)
- MiCollab AM software version 23.2 or later properly installed and configured.
- MiCollab AM UConnect module properly installed and licensed.

- Optionally, one or more properly configured remote Windows platforms for use as UCConnect Remote Servers. See the appropriate *Mitel MiCollab AM Software Release Notice* for recommendations.
- The MiCollab AM Notify application properly installed according to the instructions found in the MiCollab AM Notify Installation document.
- Mitel software feature license key enabled with MiCollab AM Notify.
- Mitel software feature license key configured with the appropriate number of UCConnect ports for MiCollab AM Notify usage.

# Critical Application Considerations

- MiCollab AM Notify is only supported for single Call Server implementations, optionally with one or more UCCConnect Remote Servers utilized to execute IVR scripts for the Call Server. Multiple Call Server implementations are not supported.
- MiCollab AM Notify relies on the ability of MiCollab AM to detect call progress. MiCollab AM determines the call progress and passes the information to MiCollab AM Notify. Therefore, accurate MiCollab AM call progress detection is crucial to a successful implementation.
- Due to call progress detection differences inherent in some IP-based integrations, some application functionality may be affected when the application is implemented on an IP-integrated system. Refer to [IP Integration Limitations](#) for specific information.
- Notification message phrases recorded through the administration telephone user interface (TUI) are stored on the Call Server in the same audio format that MiCollab AM uses to store voice messages.
- In order to avoid glare (a condition where an outbound call collides with an inbound call on the same telephone line) the callouts attribute should be enabled for the MiCollab AM lines that are least likely to receive inbound calls.

This can be done by using lines at the end of the inbound hunt group, or by dedicating lines for outbound calls only. The latter is recommended when a significant volume of both inbound and outbound calls are expected during the same time period.

- To further limit the possibility of glare, the Caller ID presented to the call recipient device can be artificially set to the incoming pilot number if allowed by the telephone switch. This is useful to prevent call recipients from returning a call to one of the active outbound ports.
- It is important to perform a controlled shut down of MiCollab AM Notify when there is a need to restart the MiCollab AM System Server while outbound calls are in progress. Refer to [Application Shutdown Procedure](#) for additional information.
- The use of text-to-speech within the MiCollab AM Notify application requires one or more licensed text-to-speech channels on the MiCollab AM system.

**IMPORTANT** This version of MiCollab AM Notify differs from previous versions in the way that the default control set for an imported notification record is determined. Refer to [Control Sets](#) for additional information.

# Application Operation

## Data Interchange

In order to accommodate diverse back-end data environments, MiCollab AM Notify exchanges notification campaign data with back-end processes using text files containing data records in comma-separated-value (CSV) format. Both input and output data files are handled in this fashion. The back-end process for input files can be as simple as a spreadsheet saved in CSV format or more complex such as a specially created database extract. Processing output files is similarly flexible; the output file can be opened in a text editor or spreadsheet for review, or imported into a database table for more detailed processing.

MiCollab AM Notify continuously monitors folders on the MiCollab AM system, or a mapped network location, for the appearance of a [Notification Import File](#). To initiate a notification campaign, the user or back-end data process copies a properly constructed import file to a monitored folder. Notification campaigns can also be initiated to pre-defined [User List Files](#) via telephone using the MiCollab AM Notify [Telephone User Interface Script](#), which generates an import file containing a record for each user in the list.

When an import file is detected, the records contained in the file are imported and appended to the list of pending notifications. Notifications are then processed according to the data contained in the records and MiCollab AM Notify settings applicable to the campaign. For additional information about applicable settings, refer to [Control Sets](#).

As the notification campaign progresses, results for each notification attempt are written to the [Notification Results Files](#). Result data records written to this file contain the outcome of the attempt, as well as other details that can be used for campaign monitoring and reporting. Multiple records will exist for a single notification in cases where multiple attempts are required to complete the notification.

The locations of the input, output, and user list files are configurable using settings in the [Management Settings](#) area of the [Application Administration](#) utility.

## Control Sets

In MiCollab AM Notify, a control set is a collection of settings that controls various aspects of notification processing, including the notification type. Using control sets, MiCollab AM Notify can be configured to process different outbound notification campaigns for diverse purposes according to the settings and rules appropriate for each. For example, separate control sets could be used for an appointment reminder campaign and a payment due campaign.

Control sets are created and configured within the [Application Administration](#) utility using the [Control Set Dialog](#). Once created, the control set ID can be specified for notification records in the [Notification Import File](#). This allows a single import file to contain records for different notification campaigns.

Alternatively, import files can be restricted to a single control set using a control set-specific import file specification. If a control set is configured with a unique, control set-specific import file specification in the [Management Overrides Group](#), the control set will be used as the default for all files matching the specification. This can prevent import files placed in a specific folder or with a specific file name from scheduling notifications using any other control set. Refer to [Using Control Sets](#) for additional information.

## Notification Processing Order

MiCollab AM Notify selects notifications for processing based on the date and time the notification is scheduled to take place, the priority weight value, and, at times, the order in which the notification records were imported into the database.

A notification is considered *waiting* when the scheduled time for the notification is reached or exceeded. For the **Callout** notification type, the scheduled time can be the original start time specified for the call, or the time that an incomplete call is scheduled to be re-attempted.

Waiting notifications are ordered by priority weight, then by scheduled notification time, and finally by database import order. The waiting notification with the highest priority weight value is always selected first. If two or more notifications have the same priority weight value, then the notification with the earliest scheduled time is selected. If two or more notifications have the same priority weight value and the same scheduled time, then the notification that was imported into the database before the others is selected.

The **Callout** notification type often uses several MiCollab AM Notify sessions to place multiple outbound telephone calls simultaneously. In contrast, the **Voice Msg** and **Text Msg** notification types are normally restricted to using a single session at any one time. While it is possible to use multiple sessions, using a single session is appropriate because these types of notifications can be sent quite rapidly.

When a waiting notification is selected by a session, it is processed and then the session looks for another waiting notification of the same type. If there are no waiting notifications of the same type, the session is free to select the next waiting notification of any type. This behavior may result in a situation where notifications of a certain type are delayed unless sessions are reserved.

### For example:

Consider a MiCollab AM Notify implementation that is licensed for four sessions (i.e., ports), and all four sessions are simultaneously being used to process **Callout** notifications. After processing a callout notification, each of these sessions will continue to look for waiting callouts to process until it does not find one. In this scenario, any waiting **Voice Msg** or **Text Msg** notifications will not be sent until there are no more waiting callouts.

To rectify the situation in the above example, the control set used for the callout notifications could be limited to using one less than the total number of sessions available, thus leaving one session free to process notifications of the other types.

For the **Callout** notification type, the precise time a call is placed depends on the number of waiting calls and the number of telephone lines available for outbound calls. Calls are never placed before their scheduled time, but may be placed somewhat after their scheduled time depending on these two factors.

### For example:

If six calls are scheduled for the same time, and only two lines are available, then four of the calls will be delayed until somewhat after the scheduled time. The delay can be considerable if the number of calls waiting is high and the number of lines available is limited.

Using the **Retry Priority Boost** setting for the **Callout** notification type, the priority weight for call retries can be increased. This allows subsequent attempts for calls that have been attempted but not completed to be prioritized ahead of other waiting calls that have not yet been attempted.

## Standard Call Dialog

The notes in this section apply after the outbound call has been connected. That is, a MiCollab AM callout line has been obtained, the telephone number has been dialed, call progress has been evaluated, and MiCollab AM has determined that the call has been answered. For some IP integrations, the call may be considered connected when a trunk has been seized for the outbound call. Refer to [IP Integration Limitations](#) for more information.

The general call dialog sequence after a connection has been established is:

- 1 Pause for zero or more seconds before proceeding.
- 2 Play chime if enabled.
- 3 Attempt answering machine detection if enabled.
- 4 Establish recipient presence if enabled.
- 5 Process custom pre-message menu if configured.
- 6 Validate recipient PIN if enabled.
- 7 Speak notification message.
- 8 Process recipient options menu or custom post-message menu.
- 9 Speak closing phrase under certain circumstances.

## Pause After Connect

Immediately after a connection is detected, the script will pause for the number of seconds specified in the **Pause After Connect** setting. This is primarily useful for IP integrations where a connection may not mean that the call was actually answered. For other integrations, a value of 1 is recommended if the **Play Chime** option is not enabled.

## Play Chime

If the **Play Chime** option is enabled, the phrase OutboundChime is played. This option is useful to provide some immediate feedback to the call recipient that an automated system is calling. If answering machine detection is enabled, there will be a slight pause while the system tries to determine if a machine has answered. Playing the chime can indicate to a live call recipient that the line is not dead.



## Attempt Detection

If the **Attempt Detection** option is enabled in the **Answering Machine** group, the script will attempt to determine whether an answering machine has answered the call.

If an answering machine is detected the script will speak the notification message after the end of the machine greeting. If the **Repeat Machine Message** option is enabled, the script will repeat the notification message. This can be used to accommodate the possibility that the end of the machine greeting is not properly detected and notification message playback begins prematurely. The script will then speak the closing phrase and end the call.

Note that if the script is instructed to leave a notification message on an answering machine, the notification message will be left regardless of whether presence verification or PIN verification is enabled. In these cases, a machine message that is different from the primary notification message can be specified so as not to relay sensitive information.

The script is instructed to leave a notification message on an answering machine using either of the following scenarios:

- 1 Supply a machine message parameter in the call record. If this parameter is supplied in the record, the script will leave a message regardless of the settings described in scenario 2.
- 2 Enable the **Leave Message** option on the [Defaults Tab](#) of the [Control Set Dialog](#). If this option is enabled, the message left will be determined according to the following rules:
  - If a Machine Msg phrase is specified for the control set the script will leave this message.
  - If a Machine Msg phrase is not specified, the script will leave the same notification message that would be spoken to a live call recipient.

## Presence Verification

Presence verification can be used to verify that a live person answered the call, and to allow the call recipient to reject the call or request to be removed from the calling list prior to hearing the notification message. Presence verification is especially useful for some IP-based integrations where positive call progress is not supported. Refer to [IP Integration Limitations](#) for more information.

Presence verification is subject to the settings specified on the [Dialog Tab](#) of the [Control Set Dialog](#), and is enabled by using the **Establish Presence** setting. The **Offer Do Not Call List** and **Allow Call Reject** settings affect the menu options that are enabled.

The presence verification **Default Prompt** should be specified according to the available menu options. Note that menu options can be available, but not announced to the call recipient.

Table 1. Presence Menu Variations

Allow Call Reject	Offer DNC	Menu Options
No	No	1 – Accept the call.
	Yes	1 – Accept the call. 2 – Request removal from calling list.

Allow Call Reject	Offer DNC	Menu Options
Yes	No	1 – Accept the call. 2 – Reject the call.
	Yes	1 – Accept the call. 2 – Reject the call. 3 – Request removal from calling list.

### Menu option notes:

- If the call recipient accepts the call, processing continues normally.
- If the call recipient rejects the call, the closing phrase is spoken and the call is ended.
- If the call recipient requests removal from the calling list, the closing phrase is spoken and the call is ended.
- If presence cannot be verified, because either a valid response is not received or the recipient disconnects, the call is rescheduled to occur after the number of minutes specified in the **No Answer Retry Interval** setting. If the **Maximum Call Attempts** limit has been reached the call is not rescheduled.
- The application waits for input from the call recipient for the amount of time specified in the **Input Timeout** setting. If no input is received in response to the initial prompt, the prompt will be repeated up to the number of times indicated by the **Input Retries** setting. When the retry limit is reached, the application concludes that presence cannot be verified. Enabling the **Assume Machine** option instructs the application to continue as if an answering machine has been detected. Refer to [Attempt Detection](#) for processing rules.

## PIN Verification

PIN verification can be used to help identify the call recipient and to control access to potentially sensitive information. If PIN verification is enabled, the call recipient is required to enter a valid PIN before gaining access to the notification message.

PIN verification is subject to the settings specified on the [Dialog Tab](#) of the [Control Set Dialog](#), and is enabled by including the [PIN](#) field in the call import file field list and including a PIN value in the imported call records.

## Speak Notification Message

Notification messages can consist of a single pre-recorded phrase or a sentence consisting of multiple phrase and data elements. Data elements can include dates, times, numbers, monetary amounts, and text strings to be spoken using text-to-speech. Refer to [Dialog Sentences](#) for sentence construction rules.

Call recipients can be prevented from interrupting playback of the notification message by enabling the **Prevent Msg Interrupt** option on the [Defaults Tab](#) for the control set in effect or supplying this

instruction in the call record [Prevent Interrupt](#) field. If this instruction is not provided, call recipients can interrupt message playback by pressing a key on their touch-tone telephone.

At the completion of the informational message, the call flow will continue in one of several ways. The following table lists the call flow actions that can occur, and the conditions that result in the action.

Table 2. Possible Call Flow Actions after Notification Message

Call Flow Action	Conditions
Custom post-message menu is presented	<ol style="list-style-type: none"> <li>1 A custom <b>Post-Message</b> menu is specified on the <a href="#">Dialog Tab</a> of the control set.</li> </ol>
<a href="#">Recipient Options Menu</a> is presented	<ol style="list-style-type: none"> <li>1 A custom <b>Post-Message</b> menu is NOT specified on the <a href="#">Dialog Tab</a> of the control set. -AND-</li> <li>2 A <b>Menu</b> phrase is configured on the <a href="#">Defaults Tab</a> of the control set. -OR- A phrase or sentence is supplied in the <a href="#">Menu Phrase</a> field in the imported call record.</li> </ol>
Call transfer is initiated	<ol style="list-style-type: none"> <li>1 The <b>Transfer Immediate</b> option is selected in the <a href="#">Call Transfer Group</a> for the control set. -OR-</li> <li>2 A value of <b>Yes</b> is supplied in the <a href="#">Transfer Mode</a> field in the imported call record.</li> </ol>
Voice message response is initiated	<ol style="list-style-type: none"> <li>1 The <b>Message Immediate</b> option is selected in the <a href="#">Call Transfer Group</a> for the control set. -OR-</li> <li>2 A value of <b>Msg</b> is supplied in the <a href="#">Transfer Mode</a> field in the imported call record.</li> </ol>

Call Flow Action	Conditions
Closing phrase is spoken and call is ended	<ol style="list-style-type: none"> <li>1 A custom <b>Post-Message</b> menu is NOT specified on the <a href="#">Dialog Tab</a> of the control set. -AND-</li> <li>2 A <b>Menu</b> phrase is NOT configured on the <a href="#">Defaults Tab</a> of the control set. -AND-</li> <li>3 A phrase or sentence is NOT supplied in the <a href="#">Menu Phrase</a> field in the imported call record. -AND-</li> <li>4 The <b>None</b> option is selected in the <a href="#">Call Transfer Group</a> for the control set. -OR- A value of <b>No</b> is supplied in the <a href="#">Transfer Mode</a> field in the imported call record.</li> </ol>

## Recipient Options Menu

The standard recipient options menu may be presented to the call recipient at the completion of the notification message.

There are three cases where the standard menu described in this section is not presented:

- A custom post-message menu is in effect for the control set.
- There is no default menu phrase configured for the control set, and a value for the menu phrase has not been included in the import file.
- An immediate transfer or voice message response is indicated.

Whether a menu is presented is governed by settings on the [Defaults Tab](#) for the control set and values supplied for the call in the [Notification Import File](#).

When a menu is presented, there are six possible recipient options menu variations. The variation presented to the call recipient depends on the **Transfer Mode** and **Offer Do Not Call List** instructions in effect for the call. The transfer option is available to the call recipient if the default transfer mode is set to **Transfer Prompt** or a [Transfer Mode](#) of **Prompt** is supplied in the call record. The voice message response option is available to the call recipient if the default transfer mode is set to **Message Prompt** or a [Transfer Mode](#) of **MsgPrompt** is supplied in the call record.

As a seventh variation, the recipient options menu can be eliminated by clearing the default **Menu**, **Transfer Menu**, and **Record Menu** settings of all text and not supplying a [Menu Phrase](#) in the call record. When the default transfer mode is set to **None** or a [Transfer Mode](#) of **No** is supplied in the call record the application will speak the notification message followed by the closing phrase and then the call will be ended.

The menu phrase spoken must be appropriate for the combination of settings in effect for the call, and is specified in the [Menu Phrase](#) field in the call record or the phrase setting value configured on the [Defaults](#)

Tab of the [Control Set Dialog](#) as indicated in the variation descriptions in the following table. Note that menu options can be available, but not announced to the call recipient.

Table 3. Recipient Options Menu Variations

Transfer Mode	Offer DNC	Menu Phrase Setting	Menu Options
None	No	Menu	1 – Repeat notification message. * – End call.
	Yes	Menu	1 – Repeat notification message. 2 – Request removal from calling list. * – End call.
Transfer Prompt	No	Transfer Menu	1 – Repeat notification message. 2 – Transfer to representative. * – End call.
	Yes	Transfer Menu	1 – Repeat notification message. 2 – Transfer to representative. 3 – Request removal from calling list. * – End call.
Message Prompt	No	Record Menu	1 – Repeat notification message. 2 – Leave message for representative. * – End call.
	Yes	Record Menu	1 – Repeat notification message. 2 – Leave message for representative. 3 – Request removal from calling list. * – End call.

### Menu option notes:

- If the call recipient requests to be removed from the calling list, the closing phrase is spoken and the call is ended.
- If a transfer is requested, the **Transfer** phrase is spoken and a call transfer is initiated.
- If the option to leave a voice message is selected, the **Record** phrase is spoken and a [Voice Message Response](#) is initiated.
- If the recipient elects to end the call, the closing phrase is spoken and the call is ended.

- If no input is received in response to the initial prompt, the prompt will be repeated up to the number of times indicated by the **Menu Input Retries** setting. When the retry limit is reached, the closing phrase is spoken and the call is ended. If there has been no input received during the call, the **Repeat Machine Message** option is enabled, and a machine message is indicated for the call, the script will speak the machine message prior to the closing phrase.

## Voice Message Response

The **Voice Message Response** process is initiated after playback of the notification message if the **Transfer Mode** in effect for the call is **Message Immediate** or **Message Prompt**. Voice message responses are sent to the MiCollab AM subscriber mailbox represented by the **Transfer Mailbox** value that is in effect for the call.

Settings related to the voice message response dialog presented to the call recipient are in the [Message Recording Group](#) on the [Messaging Tab](#) of the [Control Set Dialog](#). Settings related to the content and properties of the resulting subscriber voice message are in the [Voice Message Options Group](#).

### Settings of note:

- The **Speak Mailbox Greeting** setting determines whether the personal greeting of the message recipient is spoken prior to the recording process.
- The **Keypress to Begin** setting determines whether recording begins immediately or waits for the call recipient to press a key on the telephone keypad.
- If the **Present Send Menu** setting is enabled, the [Send Message Menu](#) will be presented to the call recipient after the response has been recorded.

## Send Message Menu

The **Send Message Menu** provides the call recipient with several options for revising or concluding a voice message response. The menu is enabled using the **Present Send Menu** setting in the [Message Recording Group](#).

Table 4. Recording Options Menu Choices

Menu Choice	Description
2	Append to the message.
4	Discard and re-record the message.
5	Send the message.
6	Listen to the message.
#	Repeat the menu options.
*	Cancel the message.

## Menu option notes:

- After a voice message response is sent, the closing phrase is spoken and the call is ended.
- When a transfer mode of **Message Immediate** is in effect, if the message recording process is canceled the call recipient will be returned to the [Recipient Options Menu](#).
- When a transfer mode of **Message Immediate** is in effect, if the message recording process is canceled the call recipient will be returned to the beginning of the voice message response dialog.

## Do Not Call List

Enabling the **Offer Do Not Call List** option on the [Dialog Tab](#) of the [Control Set Dialog](#) allows call recipients to be given the option of requesting that they be removed from the calling list.

Menu options are enabled in [Presence Verification](#) and the [Recipient Options Menu](#). Though the options are available, they do not have to be included in the corresponding menu phrase.

**NOTE** The application does not maintain an internal do-not-call list. The application notes the request in the [Notification Results Files](#). It is the responsibility of the list administrator to review the results file and ensure that the call recipient is removed from future calling campaigns.

## Closing Phrase

The closing phrase in effect for the call is either the value of the **Closing** setting specified in the [Speech Group](#) on the [Defaults Tab](#) of the [Control Set Dialog](#), or the value specified in the [Closing Phrase](#) field in the imported notification record for the call if applicable.

The closing phrase is spoken at the end of the call in most circumstances.

Cases where the closing phrase is not spoken include:

- Call disconnect is detected.
- Call is transferred.
- Timeout or validation input retries exception during presence verification.
- Timeout or validation input retries exception during PIN verification.

## Dialog Sentences

Various [Notification Import File](#) fields and [Control Set Dialog](#) settings that relate to spoken content, including notification messages, can be assigned a value that represents a *phrase* or a *sentence*.

A *phrase* is a single pre-recorded audio file that exists as a .wav file on the system hard disk. Refer to [Implementing New Phrases](#) for more information on phrase files.

A *sentence* is the method used to specify expanded spoken content consisting of a combination of pre-recorded phrases and instances of the data elements shown below.

**NOTE** For configuring settings within the [Control Set Dialog](#), the [Build Sentence Dialog](#) is provided to aid in proper sentence construction.

When specified for field and setting values, sentences are contiguous text strings consisting of one or more elements separated from each other by a space character.

**For example:**

Sentence Format:      Element1 Element2 Element3 ... ElementN

**NOTE** Dialog sentences must not include the ^ or = characters in any data element or phrase name. These characters are used internally by the application.

If the dialog sentence includes a comma, the entire field must be enclosed in double-quotes in the notification import file.

To specify pre-recorded phrases alone or in a sentence, include the phrase file name. The phrase file extension .wav is assumed and must not be included.

**For example:** Specifying the phrase name *MyPhrase* will cause the application to speak the recorded content of the *MyPhrase.wav* audio file.

In order for a phrase to be available for use, the phrase file must exist in the folder indicated by the **Speech Folder** setting on the [Options Tab](#) of the [Control Set Dialog](#) for the control set in effect for the call or exist as one of the UCCconnect [System Phrases](#).

If an element in a sentence does not start with one of the data element special characters listed below, MiCollab AM Notify will assume the element represents a pre-recorded phrase and will look for a pre-recorded phrase matching the element content. If a phrase is not found, the individual characters of the element will be spoken (i.e., the value will be spelled). However, if text-to-speech is enabled and the **Speak Unknown Words** option is enabled, the application will attempt to speak the element using text-to-speech.

To specify data elements in a sentence, precede the element value with the following special characters:

**#      Numeric value**

Numeric values can include a decimal point. To specify a percentage, include the % character immediately following the last digit.

**For example:**      #123 will speak, "One hundred twenty three."  
                         #123.45 will speak, "One hundred twenty three point four five."  
                         #12% will speak, "Twelve percent."

**\$      Monetary value**

Monetary values can include a decimal point.

**For example:**      \$99 will speak, "Ninety-nine dollars."  
                         \$99.50 will speak, "Ninety-nine dollars and fifty cents."

**~      Date value**



Date values are spoken according to the value specified in the **Speak Date Format** setting on the [Dialog Tab](#) of the [Control Set Dialog](#). The following example uses the default dddd mmmm d setting.

Date values supplied in call records are interpreted according to the Windows Regional Settings in effect on the platform.

**For example:** ~08/07/2006 will speak, "Monday, August seventh."

#### @ Time value

Time values are spoken according to the value specified in the **Speak Time Format** setting on the [Dialog Tab](#) of the [Control Set Dialog](#). The following examples use the default hh:nn am/pm setting.

**For example:** @17:35 will speak, "Five thirty five PM."

#### [ Text-to-speech

Text-to-speech elements may consist of multiple words separated by spaces. For this reason, text-to-speech elements are specified by enclosing the entire element in square brackets, i.e., [ and ] characters.

**For example:** [This is the notification message] will speak, "This is the notification message" using text-to-speech.

## Using Text-To-Speech

[Dialog Sentences](#), including notification messages, can include text strings that are spoken to recipients using MiCollab AM text-to-speech. Instructions to speak text strings using text-to-speech can be explicitly embedded in the dialog sentence. In addition, the application can be configured to speak unknown sentence elements, i.e., words, using text-to-speech. Text-to-speech usage is governed by settings in the [Text-to-Speech Group](#) for a control set.

An unknown sentence element is any element that does not begin with a data element indicator and for which a pre-recorded phrase does not exist. Using text-to-speech for unknown elements is enabled using the **Speak Unknown Words** option. If this option is not enabled, unknown sentence elements will be spelled to the recipient.

MiCollab AM text-to-speech channel resources can be shared among simultaneous notification calls. Sharing is most effective when only a portion of the dialog sentence requires text-to-speech. The number of text-to-speech channels required depends on the duration of the text spoken using text-to-speech in relation to the number of simultaneous notification calls. If a lengthy element of the dialog sentence is spoken using text-to-speech, then one text-to-speech channel should be available for each simultaneous notification call.

The amount of time a particular notification call waits for a shared text-to-speech resource to become available is configured using the **Channel Wait Timeout** setting. If a resource is not available after this time has elapsed, the **Spell on Failure** option can be enabled to instruct the application to spell the text-to-speech element to the call recipient. If this option is not enabled, the element will be skipped.

MiCollab AM Notify supports the use of MiCollab AM text-to-speech languages. The language to use for a particular notification call is specified using the **Language** setting in the control set. In addition, the **Use**

**for Data Values** setting instructs MiCollab AM Notify to speak data element values within [Dialog Sentences](#) using text-to-speech instead of using a series of concatenated pre-recorded phrases. This latter setting is especially noteworthy because MiCollab AM Notify does not natively support speaking data element values using pre-recorded phrases in languages other than English.

**NOTE** In order to utilize text-to-speech, one or more text-to-speech channels must be licensed and installed on the MiCollab AM system.

## Value Substitution Parameters

Using **Value Substitution Parameters**, data provided in the [Value0 – Value9](#) fields in the [Notification Import File](#) can be directly substituted into pre-constructed sentence templates within control set settings and custom menu action parameters, thereby eliminating the need to specify entire sentences within import file fields and simplifying import file construction requirements.

**For example:**

Consider a dialog sentence informing the call recipient of the date and time of an appointment.

Using value substitution, the default notification message can be defined as *ApptDate ~&V0 ApptTime @&V1* in a control set and, using fields *Value0* and *Value1*, the date and time data values can be included in the imported notification record.

If value substitution is not used, the full sentence would need to be included in the imported notification record as *ApptDate ~10/23/2017 ApptTime @11:30*.

**NOTE** In order to utilize value substitution, one or more value fields must be included in the notification import file field list. Refer to [Import File Fields Dialog](#).

The following table shows the valid value substitution parameter labels along with the import file field associated with each label.

Table 5. Value Substitution Parameter Labels

Value Substitution Label	Import File Field
&V0	Value0
&V1	Value1
&V2	Value2
&V3	Value3
&V4	Value4
&V5	Value5
&V6	Value6

Value Substitution Label	Import File Field
&V7	Value7
&V8	Value8
&V9	Value9
&R	Recipient ID
&D	Recipient Address (i.e., Destination)

## Result Tracking

MiCollab AM Notify includes a **Result Tracking** feature that, along with [Custom Menus](#), provides the ability to cease an outbound calling campaign when a specified number of call recipients have been reached and have chosen a specific option from a menu of choices. This feature is useful if, for example, a list of recipients must be called until a certain number of them accept a task or assignment.

Result tracking is enabled and configured for a control set using settings in the [Result Tracking Group](#) on the [Constraints Tab](#) of the [Control Set Dialog](#).

The **Target Call Result** setting specifies the call result value that is to be tracked. Call recipients signify the call result by selecting an option from a custom post-message menu, specified in the [Custom Menu Settings Group](#) for the control set, which includes one or more keys that have been assigned the **Call Result** action. Action details can be found in the [Customizing Menus and Action Lists](#) section.

Using the **Max Sessions** setting in the [Management Overrides Group](#) for the control set, the number of simultaneously placed tracked calls can be limited. Limiting the control set to a single session ensures that no additional calls will be made after the desired number of responses has been reached.

Using two or more sessions can reduce the amount of time needed to obtain the desired number of responses. However, calls may be in progress on the additional sessions when the limit is reached. In this scenario, the phrase or sentence specified in the **Limit Reached** setting will be spoken and the recipient will be prevented from responding.

The result tracking session will be concluded when the number of recipient responses reaches the value specified in the **Maximum to Accept** setting or when outbound calls to all recipients in the list have been completed. When an email address is specified in the **Report Recipient** setting, MiCollab AM Notify will send a [Tracking Session Summary Message](#) at the conclusion of the tracking session.

Result tracking sessions can be initiated by an administrator via telephone to a pre-compiled list of recipients. In addition to choosing a recipient list, the administrator can specify the number of responses desired. Refer to [Result Tracking](#) in the [Initiate Notifications](#) sub-section of [Telephone Administration](#) for additional information.

The status of ongoing and recently completed tracking sessions can be observed in real-time using the [View Result Tracking Status](#) functionality available in the application administration utility. Status information on completed tracking sessions is deleted from the database during the daily maintenance procedure.

## To configure result tracking for a control set:

- 1 Referring to the [Custom Menu](#) section, create a custom menu that includes a **Call Result** action with the parameter set to the call result to be tracked.
- 2 Open the [Control Set Dialog](#) for the new or existing control set that will be configured to use result tracking.
- 3 On the [Dialog Tab](#), activate the **Enable Custom Menus** option and specify the menu created in step 1 as the **Post-Message** menu.
- 4 On the [Constraints Tab](#), activate the **Enforce Result Limit** option and set the **Target Call Result** to the same call result specified as the parameter for the **Call Result** menu action in step 1. Configure the remaining settings in the [Result Tracking Group](#) as appropriate.

## Tracking Session Summary Message

As mentioned above, a **Tracking Session Summary Message** will be sent at the conclusion of a tracking session when an email address is specified in the **Report Recipient** setting for the control set.

**IMPORTANT** In order for the summary message to be successfully sent, MiCollab AM Notify must be configured to interact with an external email system. Refer to the [SMTP Tab](#) of the [System Settings](#) dialog.

The body of the email message is derived from two template files, *NXTrackingReport.html* and *NXTrackingReport.txt*. These template files are placed in the `\CX\UConnect\Data` folder during MiCollab AM Notify installation.

**NOTE** On systems licensed for multi-tenanting, the template files will reside within the tenant-specific UConnect folder structure for each tenant. For example, the folder for a tenant with an internal ID number of "1" would be `\CX\UConnect\tenant-data\1\Data`.

By default, the same template files are used for composing messages for all control sets. The template files can be copied to control set-specific folders and altered for specific content if desired.

## To implement control set-specific message templates:

- 1 Identify the folder specified in the **Import File** setting in the [Management Overrides Group](#) for the control set.
- 2 Create a folder named **Templates** as a sibling to the folder identified in step 1.  
| **For example:** If the import file folder is `D:\NX\Input`, the sibling folder will be `D:\NX\Templates`.
- 3 Copy the *NXTrackingReport.html* and *NXTrackingReport.txt* files from the `\MiCollab AM\UConnect\Data` folder to the newly created **Templates** folder.

## Using Switch Sections

For MiCollab AM systems with more than one configured switch section, MiCollab AM Notify supports the ability to specify the switch section to use for outbound notification calls. The specified switch section must have lines enabled for callout.

### To specify the switch section to be used:

- 1 Configure a call processor or subscriber mailbox to use the desired switch section.
- 2 Specify the number of the mailbox in the **Origination Mailbox** setting on the [Defaults Tab](#) of the [Control Set Dialog](#). If a subscriber mailbox is used a value for the **Origination Password** must also be supplied.

When configured, the switch section specified for the mailbox will be used for outbound calls placed using the control set. Different control sets can specify different originating mailboxes, and thus use different switch sections.

If a value is not supplied for the originating mailbox, the first switch section listed on the **Switch Sections** tab of MiCollab AM Configuration will be used.

## Using Alternate Languages

While particularly suited to using the English language for outbound notification calls, MiCollab AM Notify includes several control set settings that can be used to provide support for alternate languages. These settings appear on the [Options Tab](#) of the [Control Set Dialog](#), and primarily relate to the use of alternate speech folders and text-to-speech languages.

The **Language** setting in the [Text-to-Speech Group](#) allows the control set to be configured to use any TTS language installed on the MiCollab AM system.

The **Use for Data Values** setting in the [Text-to-Speech Group](#) instructs MiCollab AM Notify to speak data element values within [Dialog Sentences](#) using text-to-speech instead of using a series of concatenated pre-recorded phrases. This latter setting is especially noteworthy because MiCollab AM Notify does not natively support speaking data element values using pre-recorded phrases in languages other than English.

**NOTE** In order to utilize text-to-speech, one or more text-to-speech channels must be licensed and installed on the MiCollab AM system.

The **Speech Folder** setting in the [General Group](#) can be used to specify the UCCconnect speech folder that contains alternate language pre-recorded phrases to use during outbound notification calls. These phrases can have the same names as the English language versions for consistency and ease of use. Refer to [Implementing New Phrase Folders](#).

The **Speak Date Format**, and **Speak Time Format** settings in the [General Group](#) apply if the use of pre-recorded phrases for speaking date and time data element values is desired. In this scenario, the settings can be used to configure the order in which the pre-recorded date and time value components are spoken in a manner that is appropriate for the alternate language.

**NOTE** In order to use pre-recorded phrases for alternate language date and time values, the component phrases, for example month and day names, must be produced and placed in the UCConnect speech folder that is used for the language.

## Specifying the Language for a Call

When notification calls are to be made in multiple languages, and the preferred language of the call recipient is known in advance, the ID of the control set configured for a particular language can be included in the import record for the call.

**NOTE** In order to specify the control set to use for a call, the **Control Set** field must be included in the notification import file field list. Refer to [Import File Fields Dialog](#).

## Allowing Call Recipients to Select a Language

MiCollab AM Notify can be configured to allow call recipients to select a preferred language from a list of language options. Once a selection is made, the remainder of the notification call is presented in the chosen language.

Configuration involves creating a control set for each language to be presented as an option, and then constructing and implementing a pre-message menu containing the language choices. Producing any pre-recorded phrases to be used in each available language is also a necessity.

### To configure language selection:

- 1 Create and configure a control set to use the primary language.
- 2 Create and configure control sets to use each alternate language.
- 3 Create a custom menu that prompts the call recipient to select a language. Assign the **Continue** action to the key that will serve to continue the call in the primary language. Assign the **Control Set** action to the key that will serve to switch to an alternate language, and specify the ID of the control set corresponding to the language selected as the parameter value.
- 4 Assign the custom menu as the pre-message menu within the [Custom Menu Settings Group](#) for the primary language control set created in step 1.
- 5 Specify the primary language control set ID in the import record for each call that should allow recipients to select a language.

**NOTE** In order to specify the control set to use for a call, the **Control Set** field must be included in the notification import file field list, or the control set must specify a unique import file specification. Refer to [Using Control Sets](#).

# Application Administration

The MiCollab AM Notify Administration utility is the primary interface used to configure all settings for outbound notification campaigns. The ability to control and view the status of ongoing campaigns is also provided.

The utility is started by selecting:

**Start > Programs > MiCollab AM Desktop > MiCollab AM Notify Administration**

## First Time Configuration and Setup

When logging onto MiCollab AM Notify Administration for the first time, the utility may prompt you through one or more initialization tasks. After successful logon, the settings required to permit MiCollab AM Notify UConnect scripts to establish a connection to the MiCollab AM system must be configured. Other settings may also require configuration based on your intended MiCollab AM Notify usage.

**NOTE** Prior to completing the steps in this section, ensure that the MiCollab AM Notify Services service is installed, properly configured, and running. Refer to the *MiCollab AM Notify Installation* document for details.

### First time logon and initialization:

- 1 In the [Logon Dialog](#), enter the name of a MiCollab AM administrator account in the **Administrator** field.
- 2 In the **Password** field, enter the password for the MiCollab AM administrator account.
- 3 Click **OK**.
- 4 If a message is displayed asking whether a tenant configuration should be created, review the tenant name shown in the message.
  - If the tenant name is correct click **OK** to create the configuration.
  - If the tenant name is not correct, click **Cancel** and logon again with an account that exists in the desired MiCollab AM tenant.
- 5 If a message is displayed indicating that the configured credentials are invalid, click **Yes** to open the [System Settings](#) dialog and proceed to configure and test the **MiCollab AM Server Connection**.
- 6 Click **Apply** to save first time logon initialization changes.
- 7 During initialization, some default data and settings may be migrated from a previous version. Use the [Initialize Application Data Dialog](#) to clear and reset some or all of this data if desired.

If you were not prompted to correct the MiCollab AM Server Connection credentials during logon and initialization, the account settings should be reviewed for accuracy and appropriateness.

## To configure the MiCollab AM connection for the MiCollab AM Notify scripts:

- 1 In the **File** menu, click **System Settings...** to open the [System Settings](#) dialog.
- 2 On the **MiCollab AM System** tab, in the **MiCollab AM Server Connection** section, enter the name of a MiCollab AM administrator account in the **Administrator** field.
- 3 In the **Password** field, enter the password for the MiCollab AM administrator account.
- 4 Click the **Test** button to verify the account.
- 5 Click **OK**.

If administrative users will need to access [Telephone Administration](#) to initiate notifications or perform administrative tasks, one or more MiCollab AM Notify administrators must be created.

## To create MiCollab AM Notify administrators:

- 1 In the **File** menu, click **Administrators...**
- 2 In the [Administrators Dialog](#), click **Add**.
- 3 In the [Add/Edit Administrator Dialog](#), enter a valid MiCollab AM subscriber mailbox in the **ID** field.
- 4 Enter a description for the administrator in the **Description** field.
- 5 In the **Permissions** section, specify the appropriate permissions for the administrator. Refer to [Permissions Settings](#) for details.
- 6 Click **OK**.
- 7 Click **Save**.

If MiCollab AM Notify will be used to send voice message notifications to MiCollab AM subscriber mailboxes, a valid **Phantom Extension** must be configured.

## To configure a Phantom Extension:

- 1 In the **File** menu, click **System Settings...**
- 2 On the **MiCollab AM System** tab, in the **MiCollab AM Notify** section, enter an appropriate value in the **Phantom Ext.** field. See the description of the [Phantom Ext.](#) setting for details.
- 3 Click **OK**.

If the [Result Tracking](#) feature will be utilized, and [Tracking Session Summary Message](#) emails are desired, a SMTP email account must be configured.

## To configure the SMTP email account:

- 1 In the **File** menu, click **System Settings...**
- 2 On the **SMTP** tab, configure the account settings according to the setting descriptions in the [SMTP Tab](#) section.
- 3 Click **Test** to send a test message using the account.
- 4 Click **OK**.



# Administration Window

The **Administration** window appears when the user has successfully logged on. The window contains a **Menu Strip** and two **Tabs Pages** that provide access to all MiCollab AM Notify administrative tasks. After successfully logging onto the utility, the display name of the MiCollab AM tenant associated with the logged on administrator will be displayed in the title bar.

## Menu Strip

The utility **Menu Strip** appears in the standard menu location below the title bar. Sub-menus can be displayed by clicking on a top-level menu item or by pressing the **Alt** key followed by the key corresponding with the underlined letter in the menu item name.

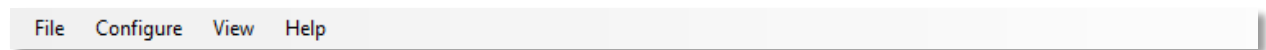


Figure 1. Menu Strip

## File Menu

The **File** menu contains items that provide access to application functions and configurable settings.

Table 6. File Menu Items

Item	Description
Logon...	Displays the <a href="#">Logon Dialog</a> . Users must logon to the application using a valid MiCollab AM administrator account.  This menu item is not available if the user has already successfully logged on in a single tenant environment.
System Settings...	Displays the <a href="#">System Settings</a> dialog, providing access to configuration settings for application connections and services.
Administrators...	Displays the <a href="#">Administrators Dialog</a> , providing access to the listing of authorized <a href="#">Telephone Administration</a> users.
Initialize...	Displays the <a href="#">Initialize Application Data Dialog</a> , providing access to the data initialization procedure and options.
Exit	Closes the <b>Administration</b> window and exits the utility.

## Configure Menu

The **Configure** menu contains items that provide access to configurable objects that can be utilized within one or more control sets.

Table 7. Configure Menu Items

Item	Description
Menus...	Displays the <a href="#">Menus Dialog</a> , providing access to the management of custom call dialog menus.
Action Lists...	Displays the <a href="#">Action Lists Dialog</a> , providing access to the management of lists of actions that can be used within custom call dialog menus.

## View Menu

The **View** menu contains items that provide access to application status and monitoring windows.

Table 8. View Menu Items

Item	Description
Notifications	Displays the <a href="#">View Notifications</a> window, providing access to a listing of current notifications in the application database.
Result Tracking	Displays the <a href="#">View Result Tracking</a> Status window, providing access to a listing of current result tracking sessions in the application database.

## Help Menu

The **Help** menu contains items that provide access to additional application information.

Table 9. Help Menu Items

Help Menu	Description
About	Displays the <b>About</b> dialog box, which contains product information, including the number of UCCconnect Ports licenses available to the application.

## Settings Tab

The **Settings** tab contains default management settings for the application, and provides access to **Control Set** configuration.

SettingsTasks

Control Sets: 3

Set ID	Type	Limit	Default Message	From	Atts	Weight	Boost	Start	End	Mach
DEFAULT	Callout	2			3	0	0	09:00	20:00	No
1	Callout		ApptOn ~&V0 At @&V1		3	0	1	11:00	16:00	Yes
2	Text Msg		Confirming your appointm...		NA	0	0	09:00	20:00	NA
3	Voice Msg				NA	0	0	18:00	21:00	NA

<

III

>

Add

Edit

Copy

Delete

Management

Import File

C:\CX\UConnect\Data\NX\Input\NXCalls.csv

...

Specify Fields

Results Folder

C:\CX\UConnect\Data\NX\Output

...

User Lists Folder

C:\CX\UConnect\Data\NX\Lists

...

Max Sessions

2

^

v

Figure 2. Settings Tab

## Control Sets Grid

The **Control Sets** grid lists all configured control sets and displays a subset of settings for each listed control set in columns. For more information about control set settings, refer to [Control Set Dialog](#).

Table 10. Control Sets Grid Columns

Column	Description
Set ID	Control Set ID setting
Type	Notification Type setting
Limit	Max Sessions setting
Default Message	Default Message setting
From	Origination Mailbox setting
Atts	Maximum Call Attempts setting

Column	Description
Weight	Priority Weight setting
Boost	Retry Priority Boost setting
Start	Default Start Time setting
End	Default End Time setting
Mach	Whether Answering Machine Detection is enabled
Msg	Default Leave Message setting
Pres	Whether Presence Verification is enabled
Menus	Whether Custom Menus are in effect
Track	Whether Result Tracking is in effect
Xfer	Default Transfer Mode setting
Ext	Transfer Extension setting
MB	Transfer Mailbox setting
TTS	Whether text-to-speech is enabled
Speech Dir	Speech Folder setting

## Control Set Buttons

Table 11. Control Set Buttons

Button	Description
Add	Add a new control set.
Edit	Edit the selected control set. Control sets may also be edited by selecting a row and pressing the <b>Enter</b> key or double-clicking on a row.
Copy	Copy the selected control set.
Delete	Delete the selected control set. Control sets may also be deleted by selecting a row and pressing the <b>Delete</b> key.

## Management Settings

The **Management Settings** group contains settings applicable to general application operation. Unless otherwise noted, the settings can be overridden within individual control sets if appropriate.

Table 12. Management Settings Group

Button	Description
Import File	The location and file name of the <a href="#">Notification Import File</a> . The application will import this file when it appears in the specified location. The file name may contain wildcards, in which case the application will import all files matching the file specification.
Results Folder	The location where the <a href="#">Notification Results Files</a> will be stored.
User Lists Folder	The location where the <a href="#">User List Files</a> will be stored.
Max Sessions	Maximum number of simultaneous notification sessions allowed. This setting can be used to limit the number of sessions used to a subset of the total allowable sessions.
Specify Fields Button	Opens the <a href="#">Import File Fields Dialog</a> . This dialog is used to specify the data fields included in the <a href="#">Notification Import File</a> .
	<b>NOTE</b> This setting is a global application setting and cannot be overridden in control sets.

## Tasks Tab

The **Tasks** tab provides access to various application management tasks. Executed tasks will be listed in the box on the tab until the utility is closed or the Clear button is clicked.

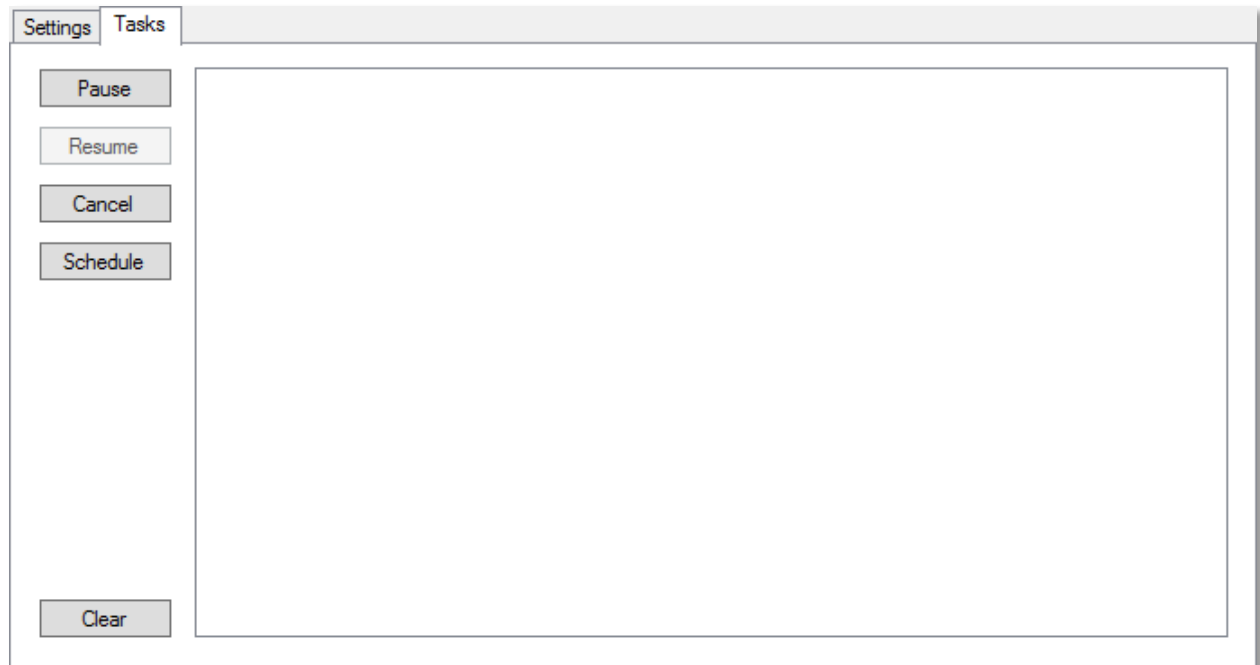


Figure 3. Tasks Tab

## Task Buttons

Table 13. Task Buttons

Button	Description
Pause	Temporarily pause the placement of outbound calls. Calls already in progress will not be affected.
Resume	Resume the placement of outbound calls.
Cancel...	Open the <a href="#">Cancel Notifications Dialog</a> in order to schedule cancelation of one or more notifications.
Schedule...	Open the <a href="#">Schedule Notification Dialog</a> in order to schedule a single outbound notification. Primarily used for testing.
Clear	Clears the list box of any existing text.

**NOTE** Administrative tasks available on this tab insert a record into the administrative import file, NXAdmin.csv, which is monitored by the application. This file is created in the folder configured for the import file, and is renamed to NXAdmin.old after the contents are imported. Administrative tasks can also be initiated using the application TUI or included in the import file by other means, allowing tasks to be executed without using the application administration utility.

For more information, refer to [Perform Tasks](#) in the Telephone User Interface Script section and [Task Commands](#) in the [Notification Import File](#) section.

## Schedule Notification Dialog

The **Schedule Notification** dialog box appears when the **Schedule** button on the **Tasks** tab is clicked.

An administrator is able to schedule a notification using this dialog. This allows the administrator to test various combinations of settings without creating a regular import file.

V0		V5	
V1		V6	
V2		V7	
V3		V8	
V4		V9	

Figure 4. Schedule Notification

Entries for the recipient address and ID are required. Other settings in the dialog are enabled based on the fields configured for inclusion in the import file.

For example:

If the import file is configured to include the control set field, then the **Control Set ID** setting will be enabled and can be specified.

Only settings that can be included in import files are available in the **Schedule Notification** dialog. To change other settings, the control set specified for the notification (or control set defaults) can be modified.

**NOTE** If the setting for **Message** is blank and not enabled, the control set specified (or control set defaults) will need to be modified to specify the message to use for the notification.

Table 14. Schedule Notification Setting Groups

Group	Description
Control Set	Control set to use for the notification.
Recipient	Settings related to the notification recipient. Parameter labels adjust based on the notification type specified in the control set.
Value Parameters	Settings related to <a href="#">Value Substitution Parameters</a> to use for the notification.
Speech	Settings related to the notification message content and call dialog.
Call Transfer	Settings related to the transfer of calls or recording of voice message responses in the <a href="#">Standard Call Dialog Recipient Options Menu</a> .
Origination	Settings related to the MiCollab AM mailbox from which the notification will originate.
Processing	Settings related to general call processing options.
Notify Period	Settings related to the time period during which notifications may be initiated.

Table 15. Schedule Notification Dialog Buttons

Button	Description
Schedule	Proceed to schedule the notification using the specified settings. The dialog remains open to allow additional notifications to be scheduled.
Reset	Reset all settings to the defaults for the specified control set.
Close	Close the dialog.

When the **Schedule** button is clicked, an import record is inserted into the administrative import file, NXAdmin.csv, which is monitored by the application. This file is created in the folder configured for the



import file, and is renamed to NXAdmin.old after the contents are imported. The file can be opened in a text editor to view the format of the import record if desired.

## Cancel Notifications Dialog

The **Cancel Notifications** dialog appears when the **Cancel** button on the **Tasks** tab is clicked. An administrator is able to schedule the cancelation of one or more notifications using this dialog.

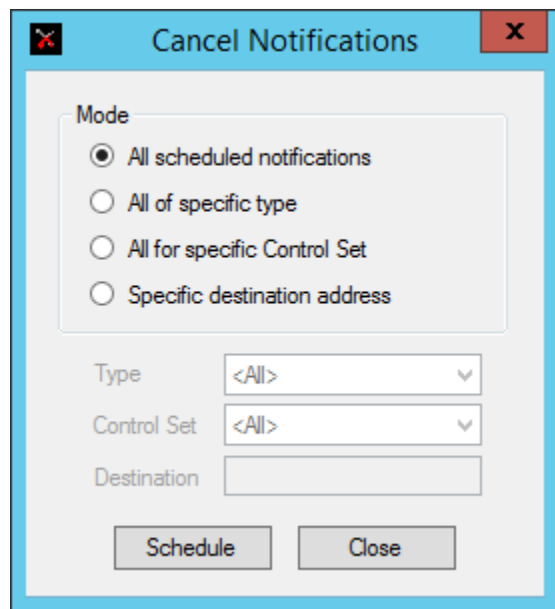


Figure 5. Cancel Notifications

Table 16. Cancel Mode Options

Mode	Description
All scheduled notifications	Cancel all currently scheduled notifications.
All of specific type	Cancel all notifications of a particular type. When this option is enabled, the <b>Type</b> can be selected from the corresponding drop-down box.
All for specific Control Set	Cancel all notifications that use a particular control set. When this option is enabled, the <b>Control Set</b> can be selected from the corresponding drop-down box.
Specific destination address	Cancel all notifications scheduled for delivery to a particular destination address. When this option is enabled, the <b>Control Set</b> can be selected from the corresponding drop-down box and the address can be entered into the <b>Destination</b> text box.

Table 17. Cancel Filters

Filter	Description
Type	Allows selection of a notification type when the <b>All of specific type</b> mode is selected.
Control Set	Allows selection of a configured control set when the <b>All for specific Control Set</b> or <b>Specific destination address</b> modes are selected.
Destination	Allows for entry of a destination address when the <b>Specific destination address</b> mode is selected.

Table 18. Cancel Notification Dialog Buttons

Button	Description
Schedule	Proceed to schedule the notification cancelation based on the specified settings. The dialog remains open to allow additional cancelation commands to be scheduled.
Close	Close the <b>Cancel Notification</b> dialog.

When the **Schedule** button is clicked, an import file record is inserted into the administrative import file, NXAdmin.csv, which is monitored by the application. This file is created in the folder configured for the call import file, and is renamed to NXAdmin.old after the contents are imported. The file can be opened in a text editor to view the format of the import record if desired.

## Logon Dialog

The **Logon** dialog allows the user to logon to the Administration utility in order to access MiCollab AM Notify configuration settings and tasks. The dialog is presented when the Administration utility is started, and in response to the user selecting the **Logon** item from the [Menu Strip](#). Credentials supplied in the dialog are verified against the MiCollab AM server on which the utility is running.

**NOTE** On a multi-tenant system, the MiCollab AM administrator account used to logon determines the MiCollab AM Notify tenant instance that will be opened for configuration.

Because MiCollab AM administrator account credentials are used, password changes are accomplished by changing the password for the administrator within the MiCollab AM system.

**NOTE** MiCollab AM administrator accounts that are configured to use a Windows Logon cannot be used to logon to MiCollab AM Notify.

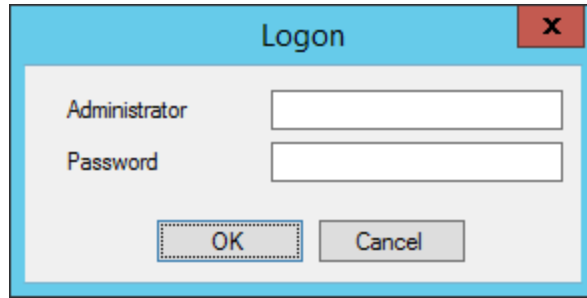


Figure 6. Logon Dialog

Table 19. Logon Dialog Controls

Control	Description
Administrator	Name of MiCollab AM administrator account.  <b>NOTE</b> On a multi-tenant system, the account must reside within the tenant that is to be opened for MiCollab AM Notify configuration.
Password	Password for MiCollab AM administrator account.
OK	Process the logon attempt using the specified values.
Cancel	Cancel the logon attempt and close the dialog.

## Control Set Dialog

A control set is a collection of settings that controls various aspects of notification processing, including the notification type. MiCollab AM Notify supports a maximum of 99 control sets.

The **Control Set** dialog is used to create and configure control sets, and contains settings organized into multiple tab pages. Depending on the **Notification Type** selected for a control set, some tab pages are not applicable. In these cases, the tab page will be inaccessible, and the tab page heading text will be displayed in strikethrough font.

## Using Control Sets

Once created, the **Control Set ID** can be specified for notification records in the [Notification Import File](#). This allows a single import file to contain records that will be processed differently.

**NOTE** To specify control sets in notification records, the [Control Set](#) field must be included in the import file field list (refer to [Notification Import File](#)).

If the **Control Set** field is not included in the import file fields list, or a control set ID is not specified in a notification record, default settings will apply to the notification pursuant to the following information.

The applicable default settings are determined by whether the import file was discovered while processing files matching the **Import File** setting in the global [Management Settings](#) group, or matching a unique **Import File** setting specified in the [Management Overrides Group](#) for a specific control set.

Files discovered while processing the **Import File** setting in the global [Management Settings](#) group will use the settings in the DEFAULT control set.

Files discovered while processing a unique **Import File** setting specified in the [Management Overrides Group](#) for a specific control set will use the settings in that specific control set.

**IMPORTANT** Care must be taken to ensure that the file specification is unique when relying on the **Import File** setting in the [Management Overrides Group](#) to determine the default control set. If the setting is not unique, notification records could be assigned to the wrong control set and result in unintended consequences.

## Basic Settings

The **Control Set ID** and **Notification Type** settings are basic to the control set and do not appear within a specific tab page.

**NOTE** The **Control Set ID** must consist of all numbers if the control set is to be selected by an administrator when using the application TUI (refer to [Telephone User Interface Script](#)).

Control Set ID

1

Notification Type

Callout

Figure 7. Control Tab

Table 20. Control Set Dialog Common Settings

Setting	Description
Control Set ID	The sequence of letters and/or numbers that is used to identify the control set. The ID can be up to eight characters in length. <div><b>NOTE</b> To allow administrators to specify the control set in the application TUI, the ID must consist solely of numbers.</div>
Notification Type	Type of notification controlled by the control set. <ul style="list-style-type: none"><li><b>Callout</b> Outbound telephone call.</li><li><b>Voice Msg</b> MiCollab AM subscriber voice message.</li><li><b>Text Msg</b> Text message using a MiCollab AM SMS provider.</li></ul>

## Dialog Buttons

The **Control Set** dialog contains three buttons.

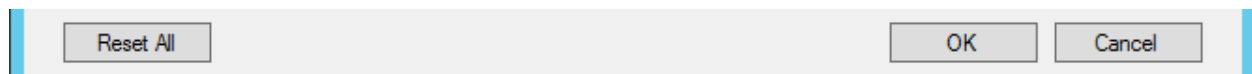


Figure 8. Control Set Dialog Buttons

Table 21. Control Set Dialog Buttons

Button	Description
Reset All Button	Reset all settings to the control set defaults.
OK Button	Save setting changes and close the dialog.
Cancel Button	Discard setting changes and close the dialog.

## Control Tab

The **Control** tab contains settings related to call processing and control. Changes to the settings on this tab apply to all subsequent attempts for calls using the control set.

Figure 9. Control Tab

## Callouts Group

The **Callouts** group contains settings related to processing outbound notification call attempts, and only applies to the **Callout** notification type.

Table 22. Callouts Settings

Setting	Description
Maximum Call Attempts	Maximum number of times to attempt a call.
Busy Retry Interval	Minimum time to wait before retrying a busy call.
No Answer Retry Interval	Minimum time to wait before retrying an unanswered call.
Retry Priority Boost	Amount by which to increase the call priority weight value for each subsequent retry. Used if retries should be prioritized over initial attempts.
Use MiCollab AM Dial Plan	Whether to use the MiCollab AM Dialing configuration when placing outbound calls and performing call transfers.
Dial Prefix	Digit(s) to append to the beginning of the telephone number before dialing. If Use MiCollab AM Dial Plan is enabled, this field is normally left blank.
Additional Ring Count	Number of additional rings to wait for answer beyond the default of approximately six rings.
Pause After Connect	Number of seconds to pause after a call is connected before beginning the call dialog. Primarily used for IP integrations. Refer to <a href="#">Standard Call Dialog</a> and <a href="#">IP Integration Limitations</a> for additional information.
Transfer Type	Type of call transfers to perform, blind or monitored. This setting should be configured based on the needs of the telephone switch. Select Blind unless a monitored transfer is required.
Transfer Hangup Delay	Number of seconds to pause before disconnecting after transferring a call. This setting should be configured based on the needs of the telephone switch.

## Management Overrides Group

The **Management Overrides** group provides settings that can be used to override the corresponding global application [Management Settings](#), and applies to all notification types. If the global application setting is in effect for the control set the setting value text will be italicized.

Table 23. Management Overrides Settings

Setting	Description
Import File	<p>The location and file name of the <a href="#">Notification Import File</a> for the control set.</p> <div> <p><b>NOTE</b> If the override location or file name differs from the <b>Import File</b> setting in the global application <a href="#">Management Settings</a> group, imported notifications will default to using the control set unless a different control set is specified (refer to <a href="#">Using Control Sets</a>).</p> </div>
Results Folder	The location where the <a href="#">Notification Results Files</a> will be stored for the control set.
User Lists Folder	The location where the <a href="#">User List Files</a> will be stored for the control set.
Max Sessions	<p>Maximum number of notifications sessions allowed to be used simultaneously by the control set.</p> <p>The maximum value allowable for this setting is governed by the corresponding setting in the global application <a href="#">Management Settings</a> group, as well as the limitations imposed on notification type sessions by application <b>Resource Limits</b>.</p> <p>See the <i>MiCollab AM Notify Installation</i> document for more information on application <b>Resource Limits</b>.</p>

## Options Tab

The **Options** tab contains settings related to notification processing options. Changes to the settings on this tab apply to all subsequent attempts for calls using the control set.

Control | **Options** | Dialog | Messaging | Constraints | Defaults

**Answering Machine**

Attempt Detection ☐ Minimum Greeting Length 5 seconds ▾  
Greeting Done Silence 2 seconds ▾

**Text-To-Speech**

Enabled ☐ Channel Wait Timeout 6 seconds ▾  
Spell on Failure ☐ Language ▾  
Speak Unknown Words ☐  
Use for Data Values ☐

**General**

Play Chime ☒ Speech Folder NXOUT ▾  
Repeat Machine Msg ☐ Speak Date Format dddd mmmm d ▾  
Speak Time Format h:n am/pm ▾

Figure 10. Options Tab

## Answering Machine Group

The **Answering Machine** group contains settings related to distinguishing whether a person or an answering device has answered the notification call, and only applies to the **Callout** notification type.

Table 24. Answering Machine Settings

Setting	Description
Attempt Detection	Whether to attempt to determine if an answering machine has answered the call. If unchecked, the script will process all answered calls as if a person has answered. Answering machine detection is not supported for IP integrations (refer to <a href="#">IP Integration Limitations</a> ).
Minimum Greeting Length	Minimum length of answer greeting required for the application to assume an answering machine has answered the call. This option is not processed if <b>Attempt Detection</b> is not enabled.
Greeting Done Silence	Length of continuous silence that indicates the answer greeting has completed. This option is not processed if <b>Attempt Detection</b> is not enabled.



## Text-to-Speech Group

The **Text-to-Speech** group contains settings related to the use of text-to-speech (TTS) by the application, and only applies to the **Callout** and **Voice Msg** notification types.

Table 25. Text-To-Speech Settings

Setting	Description
Enabled	Whether to allow the use of text-to-speech within <a href="#">Dialog Sentences</a> .
Spell on Failure	Whether to spell TTS text in the event the application is unable to speak the text due to a channel timeout or other condition. In addition, whether to spell TTS text if TTS is requested in a dialog sentence but not enabled.
Speak Unknown Words	Whether to use TTS to speak unknown words, or phrase elements, contained in dialog sentences. If not enabled, unknown phrase element names are spelled.
Use for Data Values	<p>Whether to use TTS to speak data element values, such as dates, times, and numbers, that would otherwise be spoken using concatenated pre-recorded phrases. Refer to <a href="#">Dialog Sentences</a> for more information regarding data elements.</p> <p>This capability is especially useful when notification message sentences include data values and are spoken using a language other than English.</p>
Channel Wait Timeout	Maximum number of seconds to wait for a TTS channel resource to become available.
Language	Name of the installed TTS language to use when speaking text during notifications (refer to <a href="#">Using Text-To-Speech</a> ).

## General Group

The **General** group contains settings related to notification message presentation and processing, and only applies to the **Callout** and **Voice Msg** notification types.

Table 26. General Settings

Setting	Description
Play Chime	Whether to play the outbound chime recording when the call is answered. This option is useful to provide some immediate feedback to the call recipient prior to answering machine detection.

Setting	Description												
Repeat Machine Msg	Whether to repeat the notification message if the application determines an answering machine has answered the call. The notification message will also be repeated at the end of a human-answered call if no input is received during the call.												
Speech Folder	Name of the UConnect speech folder that contains pre-recorded phrases to use during outbound notifications. Refer to <a href="#">Implementing New Phrase Folders</a> .												
Speak Date Format	<p>Format in which date data values are spoken. Select a format from the drop-down list, or enter format elements directly in the text box. Refer to <a href="#">Dialog Sentences</a> for more information.</p> <p>Valid date format elements:</p> <table> <tr> <td>d</td><td>Speak the day as a number.</td></tr> <tr> <td>dddd</td><td>Speak the day as a full name.</td></tr> <tr> <td>m</td><td>Speak the month as a number.</td></tr> <tr> <td>mmm</td><td>Speak the month as a full name.</td></tr> <tr> <td>yy</td><td>Speak the year as a 2-digit number.</td></tr> <tr> <td>yyyy</td><td>Speak the year as a 4-digit number.</td></tr> </table> <p><b>NOTE</b> If the numerical day follows the month name, then the day will automatically be spoken as an ordinal (e.g., first, second, etc.).</p>	d	Speak the day as a number.	dddd	Speak the day as a full name.	m	Speak the month as a number.	mmm	Speak the month as a full name.	yy	Speak the year as a 2-digit number.	yyyy	Speak the year as a 4-digit number.
d	Speak the day as a number.												
dddd	Speak the day as a full name.												
m	Speak the month as a number.												
mmm	Speak the month as a full name.												
yy	Speak the year as a 2-digit number.												
yyyy	Speak the year as a 4-digit number.												
Speak Time Format	<p>Format in which time data values are spoken. Select a format from the drop-down list, or enter format elements directly in the text box. Refer to <a href="#">Dialog Sentences</a> for more information.</p> <p>Valid time format elements:</p> <table> <tr> <td>h</td><td>Speak the hour as a number.</td></tr> <tr> <td>n</td><td>Speak the minute as a number.</td></tr> <tr> <td>h:n</td><td>Speak the complete time.</td></tr> <tr> <td>am/pm</td><td>Use the 12-hour clock and speak AM or PM.</td></tr> </table>	h	Speak the hour as a number.	n	Speak the minute as a number.	h:n	Speak the complete time.	am/pm	Use the 12-hour clock and speak AM or PM.				
h	Speak the hour as a number.												
n	Speak the minute as a number.												
h:n	Speak the complete time.												
am/pm	Use the 12-hour clock and speak AM or PM.												

## Dialog Tab

The **Dialog** tab contains settings related to the dialog with the call recipient after the call is connected. Changes to the settings on this tab apply to all subsequent attempts for calls using the control set. For additional information, refer to [Standard Call Dialog](#).

Figure 11. Dialog Tab

## Custom Menu Settings Group

The **Custom Menu Settings** group provides for the specification of custom pre and post-message call dialog menus, and only applies to the **Callout** notification type. If custom menus are not used, the [Standard Call Dialog](#) will apply for calls placed using the control set. For additional information, refer to [Customizing Menus and Action Lists](#).

Table 27. Custom Menu Settings

Setting	Description
Enable Custom Menus	Whether to enable the use of custom menus in the call dialog.
Pre-Message	Custom menu for presentation before the notification message.
Post-Message	Custom menu for presentation after the notification message.

## Default Menu Settings Group

The **Default Menu Settings** group contains generic settings pertaining to menus in the [Standard Call Dialog](#), and only applies to the **Callout** notification type.

Table 28. Default Menu Settings

Setting	Description
Offer Do Not Call List	Whether <a href="#">Do Not Call List</a> menu options are available to the call recipient during <a href="#">Presence Verification</a> and the <a href="#">Recipient Options Menu</a> .
Input Retries	Number of additional consecutive attempts the caller is allowed to enter a valid menu choice. The total number of attempts allowed is one greater than this setting.

## Presence Verification Group

The **Presence Verification** group contains settings related to the [Presence Verification](#) portion of the [Standard Call Dialog](#), and only applies to the **Callout** notification type.

Table 29. Presence Verification Settings

Setting	Description
Establish Presence	Whether to establish the presence of a live person by requiring DTMF input before proceeding with the remainder of the call dialog.
Allow Call Reject	Whether the call rejection option in the <a href="#">Presence Verification</a> menu is available to the call recipient.
Assume Machine	Whether to assume an answering machine has answered the call in the event that the call recipient does not supply input in response to the <a href="#">Presence Verification</a> menu. This setting applies when the allowed number of input retries has been reached.
Default Prompt	Phrase or sentence containing a menu of choices spoken when presence verification is enabled.  Value can be overridden for individual calls using the <a href="#">Presence Prompt</a> import file field.
Input Retries	Number of additional consecutive attempts the caller is allowed to enter a valid <a href="#">Presence Verification</a> menu choice. The total number of attempts allowed is one greater than this setting.
Input Timeout	Amount of time the call recipient is given to respond to the <a href="#">Presence Verification</a> menu prompt.

## PIN Verification Group

The **PIN Verification** group contains settings related to the [PIN Verification](#) portion of the [Standard Call Dialog](#), and only applies to the **Callout** notification type.

Table 30. PIN Verification Settings

Setting	Description
Input Retries	Number of additional consecutive attempts the caller is allowed to enter a valid PIN. The total number of attempts allowed is one greater than this setting.
Default Prompt	Phrase or sentence spoken when PIN input is required that prompts the call recipient to enter a PIN.  Value can be overridden for individual calls using the <a href="#">PIN Prompt</a> import file field.
Invalid Phrase	Phrase or sentence spoken in response to an invalid PIN entry.

## Messaging Tab

The **Messaging** tab contains settings related to the recording and sending of MiCollab AM voice messages by the {NotifyXpress} application.

The screenshot shows the 'Messaging' tab selected in a settings window. The window has tabs for 'Control', 'Options', 'Dialog', 'Messaging', 'Constraints', and 'Defaults'. The 'Messaging' tab is active and contains three sections: 'Message Recording', 'Voice Message Options', and 'Text Messaging'. In the 'Message Recording' section, 'Speak Mailbox Greeting' is unchecked, 'Keypress to Begin' and 'Present Send Menu' are checked. 'Max Msg Length' and 'Min Msg Length' are both set to 0 seconds. In the 'Voice Message Options' section, 'Set Urgent Status' and 'Restrict Forwarding' are unchecked. 'Introduction' has a text field and a menu icon. 'Include ID' and 'Include Telephone' are unchecked. In the 'Text Messaging' section, 'Message Prefix' has a text field, 'Timeout Minutes' is set to 0, and 'SMS Provider' has a dropdown menu.

Section	Setting	Value/Status
Message Recording	Speak Mailbox Greeting	<input type="checkbox"/>
	Keypress to Begin	<input checked="" type="checkbox"/>
	Present Send Menu	<input checked="" type="checkbox"/>
	Max Msg Length	0 seconds
Voice Message Options	Min Msg Length	0 seconds
	Set Urgent Status	<input type="checkbox"/>
	Restrict Forwarding	<input type="checkbox"/>
	Introduction	[Text Field] [Menu Icon]
	Include ID	<input type="checkbox"/>
Text Messaging	Include Telephone	<input type="checkbox"/>
	Message Prefix	[Text Field]
	Timeout Minutes	0
	SMS Provider	[Dropdown Menu]

Figure 12. Messaging Tab

## Message Recording Group

The **Message Recording** group contains settings related to call recipients recording voice message responses in the [Recipient Options Menu](#), and only applies to the **Callout** notification type.

Table 31. Message Recording Settings

Setting	Description
Speak Mailbox Greeting	Whether to speak the message recipient subscriber mailbox greeting prior to recording the voice message response. The message recipient is specified in the <b>Mailbox</b> field of the <a href="#">Call Transfer Group</a> on the <a href="#">Defaults Tab</a> or in the <a href="#">Transfer Mailbox</a> import file field.
Keypress to Begin	Whether to require a digit press to begin recording.
Present Send Menu	Whether to present the <a href="#">Send Message Menu</a> after voice message recording.
Max Msg Length	Maximum length of the resulting voice message in seconds.
Min Msg Length	Minimum length of the resulting voice message in seconds.

## Voice Message Options Group

The **Voice Message Options** group contains settings related to voice messages sent to MiCollab AM subscriber mailboxes by the application, and only applies to the **Callout** and **Voice Msg** notification types.

Table 32. Voice Message Options Settings

Setting	Description
Set Urgent Status	Whether to send the voice message with urgent priority.
Restrict Forwarding	Whether message forwarding should be restricted.
Introduction	Phrase or sentence to include as an introduction to the voice message.
Include ID	Whether to include the Recipient ID in the voice message introduction.
Include Telephone	Whether to include the Recipient Telephone number in the voice message introduction.

## Text Messaging Group

The **Text Messaging** group contains settings related to the sending of text messages by the application, and only applies to the **Text Msg** notification type.

Table 33. Text Messaging Settings

Setting	Description
Message Prefix	Text to append to the beginning of all text messages.
Timeout Minutes	Provider timeout in minutes. A value of 0 indicates that no timeout is in effect.
SMS Provider	Name of an SMS provider configured within the MiCollab AM system.

## Constraints Tab

The **Constraints** tab contains settings related to operational limitations applied to notification campaigns.

The screenshot shows a web-based configuration interface with a tabbed menu at the top: Control, Options, Dialog, Messaging, Constraints (selected), and Defaults. The main content area is titled "Result Tracking" and contains several settings:

- Enforce Result Limit:** A checkbox that is currently unchecked.
- Maximum to Accept:** A numeric input field showing the value "0" with up and down arrow buttons.
- Target Call Result:** A text input field followed by a three-dot menu button.
- Limit Reached:** A text input field followed by a three-dot menu button.
- Report Recipient:** A text input field.

Figure 13. Constraints Tab

## Result Tracking Group

The **Result Tracking** group contains settings related to concluding the notification campaign when a certain number of desired responses has been received, and only applies to the **Callout** notification type. For additional information, refer to [Result Tracking](#).

Table 34. Result Tracking Settings

Setting	Description
Enforce Result Limit	Whether to enforce a result tracking limit.
Maximum to Accept	Number of response matches to accept, after which all additional calls will be canceled.
Target Call Result	Call result value that is to be tracked.
Limit Reached	Phrase or sentence to speak to call recipients if the result limit has previously been reached.
Report Recipient	E-mail address to which tracking results will be sent.

## Defaults Tab

The **Defaults** tab contains default settings that apply unless alternative settings are specified in imported notification records. For additional details, refer to [Data Field Reference](#).

**NOTE** Changing the default value for a setting that was not included in the import file will affect all pending notifications that use the control set.

Depending on the **Notification Type** selected for the control set, some settings are not applicable and will be disabled.



Figure 14. Defaults Tab

## Speech Group

The **Speech** group contains settings related to the notification message and other spoken content used throughout the [Standard Call Dialog](#).

**NOTE** When using the **Notification Type** of **Text Msg**, this name of this settings group is **Text**.

Table 35. Speech Settings

Setting	Description
Message	<p>Default notification message for the controls set. The meaning varies based on <b>Notification Type</b>:</p> <ul style="list-style-type: none"> <li>• <b>Callout</b> Default phrase or sentence containing the notification message spoken when the call is answered.</li> <li>• <b>Voice Msg</b> Default phrase or sentence comprising the body of the voice message sent to the subscriber mailbox.</li> <li>• <b>Text Msg</b> Default text message content.</li> </ul>
Transfer	<p>Default phrase or sentence spoken prior to transferring the call to a customer service representative if a transfer is in order.</p>

Setting	Description
Record	Default phrase or sentence spoken prior to recording a voice message if a voice message response is in order.
Closing	Default phrase or sentence spoken prior to ending the call.
Menu	Default phrase or sentence containing a menu of choices spoken following the notification message when a call transfer is not allowed.
Transfer Menu	Default phrase or sentence containing a menu of choices spoken following the notification message when a call transfer is allowed.
Record Menu	Default phrase or sentence containing a menu of choices spoken following the notification message when a voice message response is allowed.
Machine Msg	Default phrase or sentence containing the notification message spoken when the application determines that an answering machine has answered the call.

## Call Transfer Group

The **Call Transfer** group contains settings related to contact options available in the [Recipient Options Menu](#), and only applies to the **Callout** notification type.

Table 36. Call Transfer Settings

Setting	Description
Mode	<p>Default transfer mode.</p> <ul style="list-style-type: none"> <li>• <b>None:</b> Do not transfer to extension or mailbox.</li> <li>• <b>Transfer Immediate:</b> Transfer immediately after playing notification message.</li> <li>• <b>Transfer Prompt:</b> Provide option to transfer the call after playing notification message.</li> <li>• <b>Message Immediate:</b> Record voice message response immediately after playing notification message.</li> <li>• <b>Message Prompt:</b> Provide option to record voice message response after playing notification message.</li> </ul>
Extension	Default transfer extension. Applies to <b>Transfer Immediate</b> and <b>Transfer Prompt</b> modes.

Setting	Description
Mailbox	Default voice message response recipient mailbox. Applies to <b>Message Immediate</b> and <b>Message Prompt</b> modes.

## Origination Group

The **Origination** group contains settings related to the origination of outbound calls and voice messages, and only applies to the **Callout** and **Voice Msg** notification types.

Table 37. Origination Settings

Setting	Description
Mailbox	<p>Default subscriber or call processor mailbox used to originate notifications.</p> <p>This setting serves two purposes:</p> <ol style="list-style-type: none"> <li>1 The switch section specified in the mailbox will determine the switch section used to originate outbound calls.</li> <li>2 The mailbox will be the message sender for any resultant voice messages.</li> </ol>
Password	Security code for a subscriber mailbox specified in the <b>Mailbox</b> setting. Not applicable to call processor mailboxes.

## Processing Group

The **Processing** group contains settings related to general call processing options, and only applies to the **Callout** and **Voice Msg** notification types.

Table 38. Processing Settings

Setting	Description
Priority Weight	Default setting specifying the priority weight value to apply to the call. Calls with a higher priority weight value will be placed ahead of other calls that are waiting to be processed.
Leave Message	Default setting specifying whether to leave a notification message and consider the call completed if it is determined that an answering machine has answered the call.
Prevent Msg Interrupt	Default setting specifying whether the call recipient is prevented from interrupting message playback by entering DTMF.

## Notify Period Group

The **Notify Period** group contains settings related to the time period during which notifications may be initiated, and applies to all notification types.

Table 39. Notify Period Settings

Setting	Description
Start	Default time of day at which notification attempts will start.
End	Default time of day at which notification attempts will end.

**NOTE** The default start date is the date on which the import file is processed. The default end date is the same as the start date.

## Build Sentence Dialog

Numerous settings within control sets are used to specify a phrase or sentence for notification and call dialog components. To specify values for these settings, the value can be entered directly into the corresponding text box or the button containing an ellipsis (...) next to the text box can be clicked to display the **Build Sentence** dialog.

Using this dialog, a correctly formatted sentence can be constructed using any of the available phrase and data elements.

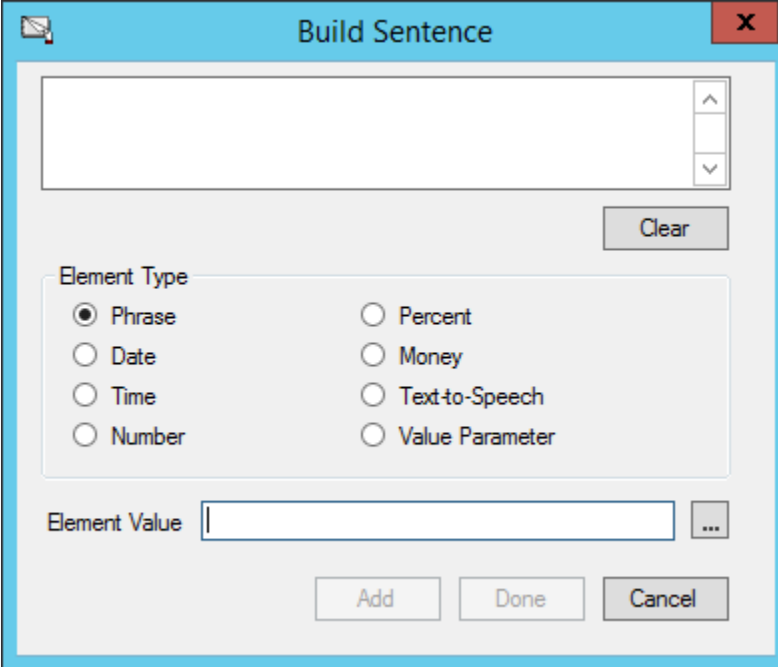
The image shows a 'Build Sentence' dialog box with a light blue title bar and a red close button. It features a large text area at the top with up and down arrows on the right. Below this is a 'Clear' button. The 'Element Type' section contains two columns of radio buttons: 'Phrase' (selected), 'Date', 'Time', 'Number', 'Percent', 'Money', 'Text-to-Speech', and 'Value Parameter'. At the bottom, there is an 'Element Value' text box with an ellipsis button to its right. At the very bottom are 'Add', 'Done', and 'Cancel' buttons.

Figure 15. Build Sentence Dialog

To construct a sentence, first select the desired **Element Type** and then use the **Element Value** controls to specify the value for the element.

After the value has been specified, click the **Add** button to add the formatted element to the sentence. When sentence construction is complete, click the **Done** button to close the dialog and return the sentence value to the control set setting.

For additional information, refer to [Dialog Sentences](#).

## Build Text Message Dialog

For control sets using the **Text Msg** notification type, the value for the default text message content can be specified in the **Message** setting on the [Defaults Tab](#) for the control set. To specify a value for this setting, the value can be entered directly into the corresponding text box or the button containing an ellipsis (...) next to the text box can be clicked to display the **Build Text Message** dialog.

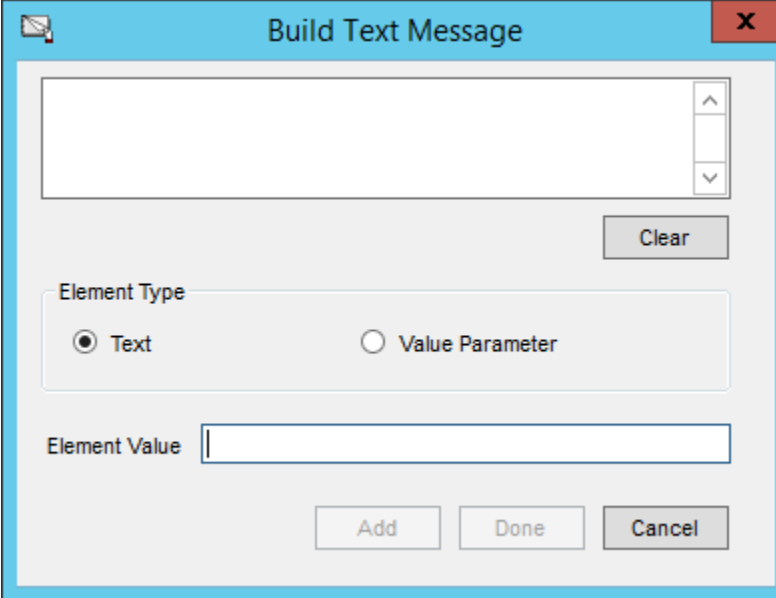
The image shows a 'Build Text Message' dialog box. It has a title bar with a close button (X). Inside, there is a large text area at the top with up and down arrows on the right. Below this is a 'Clear' button. Underneath is the 'Element Type' section with two radio buttons: 'Text' (which is selected) and 'Value Parameter'. At the bottom is the 'Element Value' section with a text input field. At the very bottom are three buttons: 'Add', 'Done', and 'Cancel'.

Figure 16. Build Text Message Dialog

To construct a message, first select the desired **Element Type** and then use the **Element Value** controls to specify the value for the element.

After the value has been specified, click the **Add** button to add the formatted element to the message. When message construction is complete, click the **Done** button to close the dialog and return the message value to the control set setting.

## System Settings

The **System Settings** dialog provides access to configuration settings for application connections and services. The dialog is accessed by making the following selection from the MiCollab AM Notify Administration [Menu Strip](#):

**File > System Settings...**

## MiCollab AM System Tab

The **MiCollab AM System** tab contains settings related to MiCollab AM Notify interaction with the MiCollab AM system.

The screenshot shows a dialog box titled 'System' with a tab labeled 'SMTP'. Inside the dialog, there are two main sections. The first section, 'Server Connection', contains two text input fields: 'Administrator' (with the text 'Administrator' entered) and 'Password' (with masked characters '\*\*\*\*\*'). To the right of the 'Password' field is a 'Test' button. The second section, 'NotifyXpress', contains a single text input field labeled 'Phantom Ext.' with the value '1' entered.

Figure 17. System Settings System Tab

## MiCollab AM Server Connection Group

The **MiCollab AM Server Connection** group contains settings required to enable MiCollab AM Notify UCCconnect scripts to establish a connection to the MiCollab AM system.

Table 40. MiCollab AM Server Connection Settings

Setting	Description
Administrator	MiCollab AM administrator account User ID.  <b>NOTE</b> On multi-tenant systems, the account must exist in the same tenant as the account that was used to logon to the MiCollab AM Notify Administration utility.
Password	Password for the MiCollab AM administrator account.

Setting	Description
Test Button	Performs a connection test using the specified administrator account credentials.

## MiCollab AM Notify Group

The **MiCollab AM Notify** group contains settings related to MiCollab AM Notify interaction with the MiCollab AM system in support of application functionality.

Table 41. MiCollab AM Notify Settings

Setting	Description
Phantom Ext.	Extension dialed by MiCollab AM Notify when establishing the required MiCollab AM line instance for sending <b>Voice Msg</b> notifications.
<b>NOTE</b> The configured value must pass the MiCollab AM Dial Plan rules, but should not be an actual, physical extension.	

## SMTP Tab

The **SMTP** tab contains settings related to MiCollab AM Notify interaction with an external email system in order to send [Result Tracking](#) summary reports.

Figure 18. System Settings SMTP Tab

## Mail Server Group

The **Mail Server** group contains settings related to the external mail system connection.

Table 42. Mail Server Settings

Setting	Description
Server Address	Name or IP address of mail server.
Encryption Type	Type of encryption required for mail server connection.
Port	Port number to use for mail server connection.
Requires Authentication	Whether the mail server requires account authentication.

## Authentication Group

The **Authentication** group contains settings related to the account to be used for authentication with the external mail system.



Table 43. Authentication Settings

Setting	Description
Logon ID	Logon ID (user name) to use for authentication.
Password	Password for the specified Logon ID.
Use Windows	Whether to use the Windows user account that the MiCollab AM UCCconnect service is running under for authentication.

## Message Sender Group

The **Message Sender** group contains settings related to the account on the mail server from which email messages will be sent.

Table 44. Message Sender Settings

Setting	Description
Name	Name of the message sender.
Email Address	Email address of the message sender.

## Test Button

The **Test** button can be used to verify the mail server settings by sending a test email message. When the button is clicked, the following dialog is displayed:

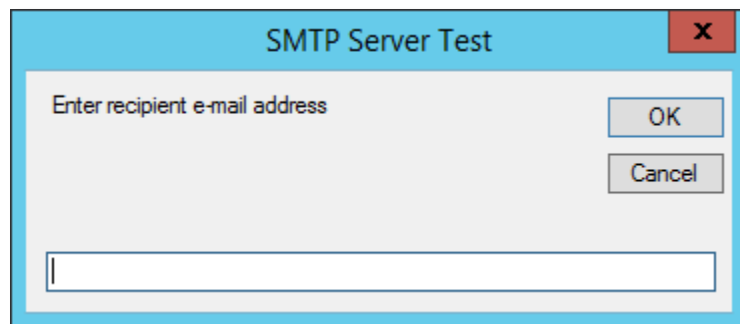


Figure 19. SMTP Server Test Dialog

To send a test message, enter the recipient e-mail address in the dialog box and then click the **OK** button.

## Administrators Dialog

An administrator is a person who is allowed to access the application telephone user interface (TUI). Administrators can be assigned various permissions, and are configured by making the following selection from the MiCollab AM Notify Administration [Menu Strip](#):

### **File > Administrators...**

To provide application security, administrators are tied directly to MiCollab AM subscriber mailboxes through the administrator ID number. When accessing the telephone user interface, administrators are required to enter an ID number and the security code of the subscriber mailbox that matches the ID number. For this reason, each configured administrator must have an associated subscriber mailbox.

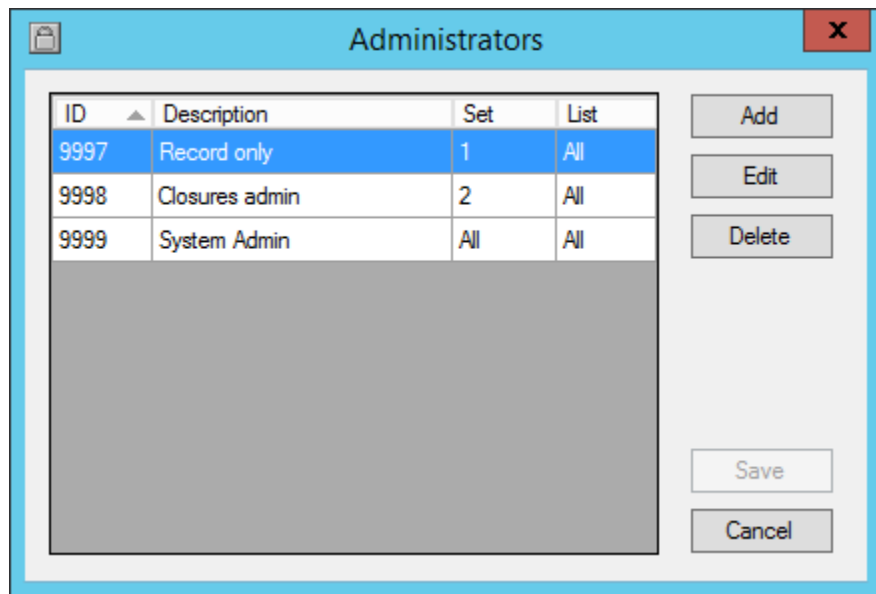


Figure 20. Administrators Dialog

## Administrators Grid

Table 45. Administrators Grid Columns

Column	Description
ID	ID number of the administrator.
Description	Description of the administrator.
Set	Control set the administrator is allowed to utilize.
List	User list the administrator is allowed to utilize.

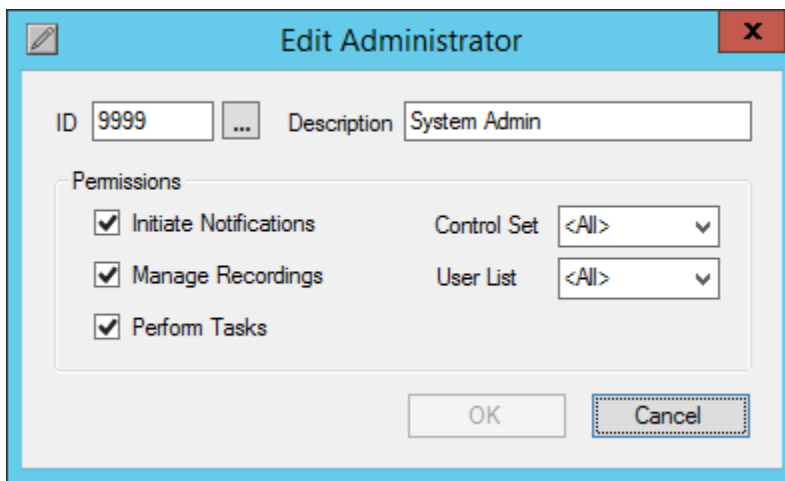
## Administrators Buttons

Table 46. Administrators Dialog Buttons

Button	Description
Add	Add a new administrator.
Edit	Edit the selected administrator. Administrators may also be edited by selecting a row and pressing the <b>Enter</b> key or double-clicking on a row.
Delete	Delete the selected administrator. Administrators may also be deleted by selecting a row and pressing the <b>Delete</b> key.
Save	Save the administrators configuration.
Cancel	Cancel changes and exit the dialog.

## Add/Edit Administrator Dialog

When choosing to add or edit an administrator, the following dialog is displayed:



The screenshot shows a dialog box titled "Edit Administrator". It features a title bar with a pencil icon and a close button. The main content area includes an "ID" field with the value "9999" and a "Description" field with the value "System Admin". Below these fields is a "Permissions" section containing three checked checkboxes: "Initiate Notifications", "Manage Recordings", and "Perform Tasks". To the right of the checkboxes are two dropdown menus labeled "Control Set" and "User List", both showing "<All>". At the bottom of the dialog are "OK" and "Cancel" buttons.

Figure 21. Edit Administrator Dialog

## Administrator ID Settings

Table 47. Administrator ID Settings

Setting	Description
ID	<p>ID number of the administrator. The ID number must match the MiCollab AM subscriber mailbox used to provide application security.</p> <p>To select from a list of subscriber mailboxes, click on the button containing the ellipsis (...) next to the ID text box.</p>
Description	Description of the administrator.

## Permissions Settings

Table 48. Administrator Permissions Settings

Setting	Description
Initiate Notifications	Whether or not to allow the administrator to initiate notification campaigns.
Manage Recordings	Whether or not to allow the administrator to manage recorded notification message phrases.
Perform Tasks	Whether or not to allow the administrator to perform system tasks.
Control Set	Optionally used to limit the control set that the administrator can utilize when initiating notifications or managing recordings.
User List	<p>Optionally used to limit the user list that the administrator can specify when initiating notifications.</p> <p>If a specific control set has been specified in the <b>Control Set</b> setting, only the user lists residing in the location specified by the <b>User Lists Folder</b> setting in the <a href="#">Management Overrides Group</a> for the selected control set will be listed as selections in the drop-down list for this setting.</p>

**NOTE** It is possible to specify a non-existent control set or user list by typing directly into the corresponding item's text box. This allows administrators to be created in advance of the items. An error will occur if the item does not exist when the administrator signs into the TUI.

# Initialize Application Data Dialog

The **Initialize Application Data** dialog provides access to the data initialization procedure and options. The dialog is accessed by making the following selection from the MiCollab AM Notify Administration [Menu Strip](#):

**File > Initialize...**

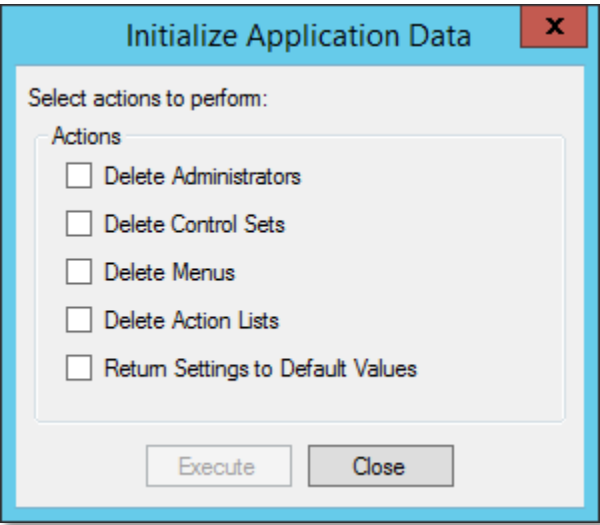


Figure 22. Initialize Application Data Dialog

**IMPORTANT** Data initialization actions cannot be reversed after execution. If there is a chance that data will need to be recovered, ensure that the relevant data files are backed up.

**NOTE** Unless otherwise noted, the data files referenced in the following table reside in the `\CX\UConnect\Data` folder on single tenant systems, and in the tenant-specific Data folder on multi-tenant systems. For example, the tenant-specific Data folder for a tenant with an internal ID number of "1" would be `\CX\UConnect\tenant-data\1\Data`.

Table 49. Initialize Application Data Actions

Action	Description
Delete Administrators	Deletes all telephone user interface (TUI) administrators that have been added using the <a href="#">Administrators Dialog</a> . Administrators are stored in the <i>NXADMINS.dat</i> file.
Delete Control Sets	Deletes all control sets that have been configured. Control sets are stored in the <i>NXSETS.dat</i> file.

Action	Description
Delete Menus	<p>Deletes all custom menus that have been added using the <a href="#">Menus Dialog</a>.</p> <p>Custom menus are stored in the application database, <i>NXOUT.mdb</i>.</p>
Delete Action Lists	<p>Deletes all action lists that have been added using the <a href="#">Action Lists Dialog</a>.</p> <p>Action lists are stored in the application database, <i>NXOUT.mdb</i>.</p>
Return Settings to Default Values	<p>Returns all application settings, include DEFAULT control set settings, to their default values.</p> <p>Application settings for all tenants are stored in the <i>NXScriptConfiguration.xml</i> file residing in the <i>\CX\UCConnect\Bin</i> folder.</p>

# Customizing Menus and Action Lists

For outbound notification telephone calls, MiCollab AM Notify supports the implementation of custom pre-message and post-message menus that can be used in place of the [Standard Call Dialog](#) menus. Pre-message menus are presented to callers before the notification message, and post-message menus are presented to callers after the notification message.

With custom menus, MiCollab AM Notify menu actions can be assigned to each key on a telephone keypad. In addition, a special type of menu action called an **Action List** can be assigned to a key. As the name implies, an **Action List** is a series of actions to be performed.

Once created, custom menus can be designated for use within one or more control sets. Outbound calls subject to the settings in the control set will use the custom menus instead of the standard dialog.

## To use custom menus for outbound calls:

- 1 Create the custom menu using the information found in this section.
- 2 Assign the menu to a control set using the settings within the [Custom Menu Settings Group](#) on the [Dialog Tab](#) of the [Control Set Dialog](#).
- 3 Specify the control set in the import record when scheduling the calls.

## Custom Menus

Custom pre-message and post-message menus are configured by making the following selection from the application administration utility [Menu Strip](#):

**Configure > Menus...**

## Menu Dialog

The **Menus** dialog displays a list of all existing menus, and provides list management and access to the configuration of the underlying menus.

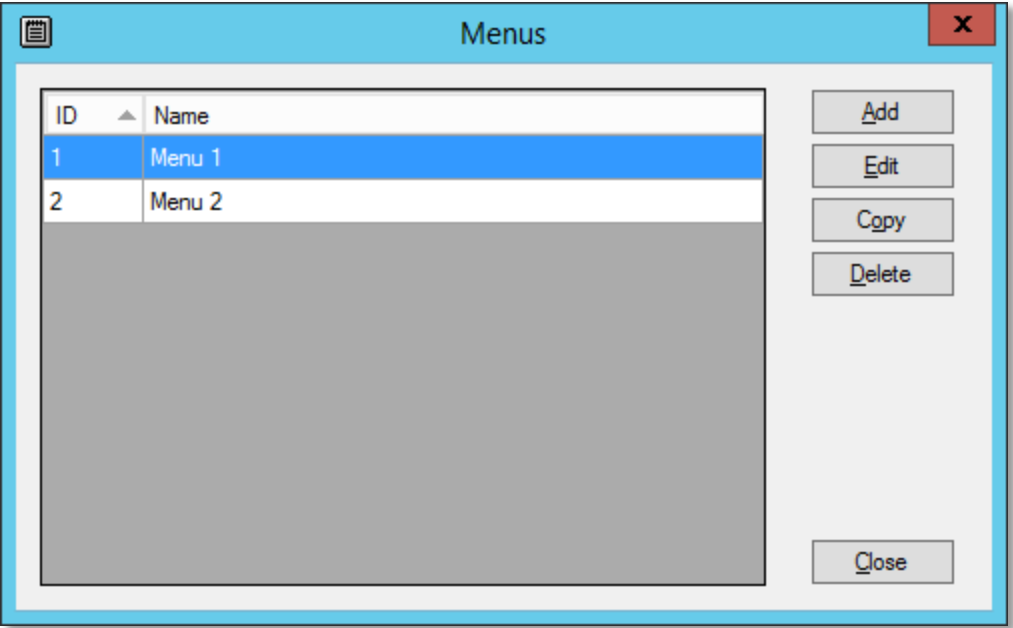


Figure 23. Menus Dialog

## Menus Grid

Table 50. Menus Grid Columns

Column	Description
ID	ID number of the menu.
Name	Name of the menu.

## Menus Dialog Buttons

Table 51. Menus Dialog Buttons

Button	Description
Add	Add a new menu.
Edit	Edit the selected menu. Menu may also be edited by selecting a row and pressing the <b>Enter</b> key or double-clicking on a row.
Copy	Create a new menu based on the settings contained in the selected menu.
Delete	Delete the selected menu. Menu may also be deleted by selecting a row and pressing the <b>Delete</b> key.



Button	Description
Close	Close the dialog.

## Add/Edit Menu Dialog

The **Add/Edit Menu** dialog is used to create a new menu and edit the settings of an existing menu.

The screenshot shows the 'Add Menu' dialog box. It has a title bar with a close button. The dialog is divided into several sections:

- Settings:** Contains fields for 'Menu ID', 'Name', and 'Prompt'.
- Sponsor:** Contains fields for 'Mailbox' (with a dropdown showing 'default') and 'Security Code'.
- Timeout Actions:** A table with columns 'Key', 'Action', and 'Parameter'. It contains two rows: 'TR' with 'Invalid' action and 'TF' with 'Invalid' action.
- Invalid Entry Actions:** A table with columns 'Key', 'Action', and 'Parameter'. It contains two rows: 'VR' with 'Invalid' action and 'VF' with 'Invalid' action.
- Menu Actions:** A large table with columns 'Key', 'Action', and 'Parameter'. It contains 12 rows, all with 'Invalid' action.

At the bottom of the dialog are buttons for 'OK', 'Revert', 'Apply', and 'Close'.

Figure 24. Add/Edit Menu Dialog

## Menu Settings

Table 52. Menu Settings

Setting	Description
Menu ID	Menu ID number.
Name	Menu name.
Prompt	Phrase or sentence that is spoken to solicit a menu choice from the call recipient.
Sponsor Mailbox	Subscriber or call processor mailbox that will be the origin of any voice messages sent within the menu.
Security Code	Security code for Sponsor subscriber mailbox.

Setting	Description
Timeout Actions	<p>Actions that apply when the call recipient does not make a menu selection within six seconds.</p> <ul style="list-style-type: none"> <li>• <b>TR</b> Regular timeout action.</li> <li>• <b>TF</b> Final timeout action. Applies when the number of consecutive input timeouts exceeds the <b>Input Retries</b> setting in the <a href="#">Default Menu Settings Group</a> for the control set.</li> </ul>
Invalid Entry Actions	<p>Actions that apply when the call recipient chooses an invalid option from the menu.</p> <ul style="list-style-type: none"> <li>• <b>VR</b> Regular invalid entry action.</li> <li>• <b>VF</b> Final invalid entry action. Applies when the number of consecutive input timeouts exceeds the <b>Input Retries</b> setting in the <a href="#">Default Menu Settings Group</a> for the control set.</li> </ul>
Menu Actions	<p>Actions that are assigned to one or more keys on the telephone keypad.</p>

### To specify a menu action:

- 1 Select the desired action type from the drop-down list in the **Action** column corresponding to the desired telephone key.
- 2 For actions that accept a parameter, enter a value in the **Parameter** column or click the button in the right-hand column to choose from available parameter values.

**NOTE** Entering a parameter value is optional if the action type has a default value. Actions that have a default value will display a default value hint in the parameter column when the column is blank.

## Dialog Buttons

Table 53. Add Menu Dialog Buttons

Setting	Description
OK	Save pending changes and close the dialog.
Revert	Return all changed settings to their original values.
Apply	Save pending changes.
Close	Close the dialog.

## Menu Actions

The following table lists and describes the actions that can be specified as **Menu Actions** within the [Add/Edit Menu Dialog](#).

With a few exceptions, menus and action lists support the same actions. However, the behavior of actions within **Menu Actions** and [Action List Actions](#) can vary based on context. Generally speaking, actions in a menu are processed and then the call is ended. However, there are exceptions. These exceptions are noted in the following table.

Table 54. Menu Actions

Action	Description
Action List	Process a list of actions contained in an action list. <b>Parameter:</b> Valid action list name.
Call Result	Set a custom call result value and end the call. <b>Parameter:</b> Custom call result label. If a value is not provided, any previously assigned custom call result value is discarded.
Continue	Continue to the next step in the notification call dialog. Primarily meaningful in a <i>pre-message</i> menu to move on to the notification message without performing an explicit action.
Control Set	Load the settings contained in an alternate control set and continue. <b>Parameter:</b> Valid control set ID. <b>NOTE</b> This action is only valid in a <i>pre-message</i> menu.
Do Not Call	Set call result to DO_NOT_CALL and end the call. <b>Parameter:</b> Phrase or sentence to speak prior to ending the call. If a value is not provided the default closing phrase will apply.
End Call	End the call. <b>Parameter:</b> Phrase or sentence to speak prior to ending the call. If a value is not provided the default closing phrase will apply.
Invalid	Signifies the menu key is an invalid choice. Configured <b>Invalid Entry Actions</b> apply.
Prompt	Repeat the menu <b>Prompt</b> .

Action	Description
Reject Call	<p>Set call result to REJECTED and end the call.</p> <p><b>Parameter:</b> Phrase or sentence to speak prior to ending the call. If a value is not provided the default closing phrase will apply.</p> <p><b>NOTE</b> This action is only valid in a <i>pre-message</i> menu.</p>
Repeat	<p>Repeat the notification message, followed by the menu.</p> <p>After the notification message is repeated the menu is presented again.</p> <p><b>NOTE</b> This action is only valid in a <i>post-message</i> menu.</p>
Speak	<p>Speak a phrase or sentence and repeat the menu.</p> <p><b>Parameter:</b> Phrase or sentence to speak.</p>
Transfer	<p>Set call result to TRANSFER and transfer the call.</p> <p><b>Parameter:</b> Transfer extension or a value substitution parameter. If a value is not provided, the default transfer extension is used.</p>
Voice Msg	<p>Record a voice message response.</p> <p>If a response is recorded and saved the call result is set to VM_REPLY and the call is ended. Otherwise, control returns to the menu and the menu prompt is repeated.</p> <p><b>Parameter:</b> Message recipient subscriber mailbox number or a value substitution parameter. If a value is not provided, the default transfer mailbox is used.</p>

## Custom Action Lists

Custom action lists that can be used in pre-message and post-message menus are configured by making the following selection from the application administration utility [Menu Strip](#):

**Configure > Action Lists...**

## Action Lists Dialog

The **Action Lists** dialog displays a list all existing action lists, and provides list management and access to the configuration of the underlying action lists.

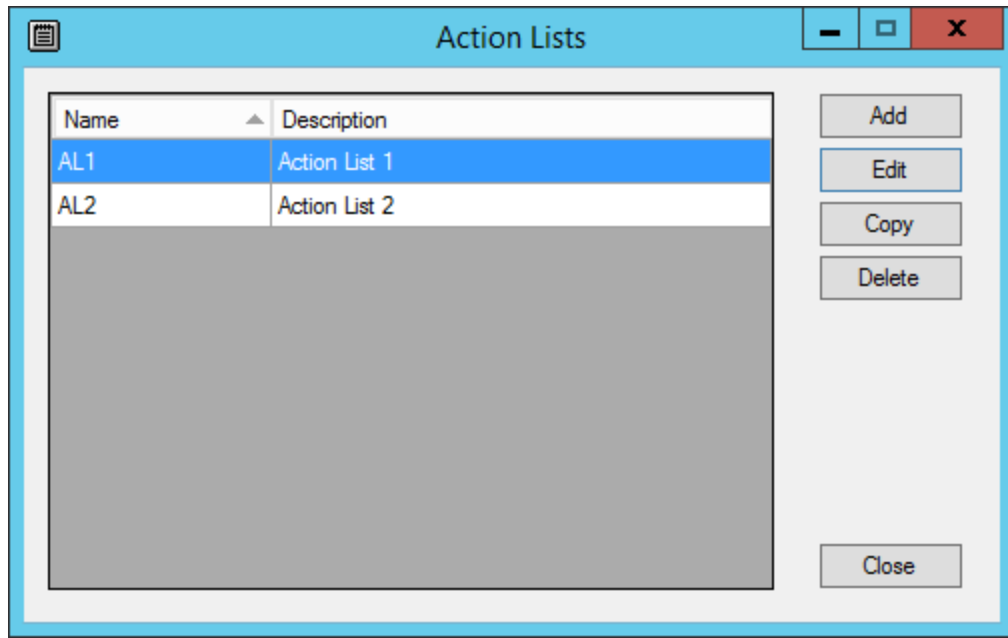


Figure 25. Action Lists Dialog

## Action Lists Grid

Table 55. Action Lists Grid Columns

Column	Description
Name	Action list name.
Description	Action list description.

## Action Lists Dialog Buttons

Table 56. Action Lists Dialog Buttons

Button	Description
Add	Add a new action list.
Edit	Edit the selected action list. Action lists may also be edited by selecting a row and pressing the <b>Enter</b> key or double-clicking on a row.
Copy	Create a new action list based on the settings contained in the selected action list.

Button	Description
Delete	Delete the selected action list. Action lists may also be deleted by selecting a row and pressing the <b>Delete</b> key.
Close	Close the dialog.

## Add/Edit Action List Dialog

The **Add/Edit Action List** dialog is used to create a new action list and edit the settings of an existing action list.

The screenshot shows the 'Add Action List' dialog box. It features a title bar with a pencil icon and a close button. The main area contains two text input fields for 'Name' and 'Description'. Below these is a section titled 'Actions' which contains a table with 10 rows. Each row has columns for '#', 'Action', 'Parameter', and a small square icon. The 'Action' column contains the word 'Undefined' for all rows. At the bottom of the dialog are four buttons: 'OK', 'Revert', 'Apply', and 'Close'.

Figure 26. Menu Dialog

## Action List Settings

Table 57. Action List Settings

Setting	Description
Name	Action list name.

Setting	Description
Description	Action list description.
Actions	List of up to 10 actions to be processed in order starting at item #0.

### To specify an action list item:

- 1 Select the desired action type from the drop-down list in the **Action** column.
- 2 For actions that accept a parameter, enter a value in the **Parameter** column or click the button in the right-hand column to choose from available parameter values.

**NOTE** Entering a parameter value is optional if the action type has a default value. Actions that have a default value will display a default value hint in the parameter column when the column is blank.

## Dialog Buttons

Table 58. Add Action List Dialog Buttons

Setting	Description
OK	Save pending changes and close the dialog.
Revert	Return all changed settings to their original values.
Apply	Save pending changes.
Close	Close the dialog.

## Action List Actions

The following table lists and describes the actions that can be specified as **Actions** within the [Add/Edit Action List Dialog](#).

With a few exceptions, menus and action lists support the same actions. However, the behavior of actions within [Menu Actions](#) and **Action List Actions** can vary based on context. Generally speaking, all actions in an action list are processed in the specified order. However, some actions terminate list processing prior to the end of the list. These exceptions are noted in the following table.

Table 59. Action List Actions

Action	Description
Call Result	<p>Set a custom call result value and continue list processing.</p> <p><b>Parameter:</b> Custom call result label. If the parameter is left blank, any previously assigned custom call result value is discarded.</p> <p><b>NOTE</b> If result tracking is active and the limit has previously been reached, no further actions are processed.</p>
Confirm	<p>Confirm that the menu key that initiated the action list was the intended selection.</p> <p>To confirm the selection, the recipient must press the <b>1</b> key. Any other keypress indicates that the selection is not confirmed.</p> <p><b>Parameter:</b> Phrase or sentence to speak to confirm the menu choice. If a value is not provided, a default confirmation sentence applies.</p> <p><b>NOTE</b> If the selection is confirmed, action list processing continues. Otherwise, action list processing is terminated and control returns to the menu that initiated the action list.</p>
Control Set	<p>Load the settings contained in an alternate control set.</p> <p><b>Parameter:</b> Valid control set ID</p> <p><b>NOTE</b> This action terminates action list processing.</p>
Do Not Call	<p>Set call result to DO_NOT_CALL and continue list processing.</p> <p><b>Parameter:</b> Phrase or sentence to speak prior to ending the call. If a value is not provided the default closing phrase will apply.</p> <p><b>NOTE</b> Any custom call result value set by a previous <b>Call Result</b> action will be retained.</p>
End Call	<p>End the call.</p> <p><b>Parameter:</b> Phrase or sentence to speak prior to ending the call. If a value is not provided the default closing phrase will apply.</p> <p><b>NOTE</b> This action terminates action list processing.</p>



Action	Description
Reject Call	<p>Set call result to REJECTED and continue list processing.</p> <p><b>Parameter:</b> Phrase or sentence to speak prior to ending the call. If a value is not provided the default closing phrase will apply.</p> <p><b>NOTE</b> Any custom call result value set by a previous <b>Call Result</b> action will be retained.</p> <p><b>NOTE</b> This action is only valid when initiated by a key in a <i>pre-message</i> menu.</p>
Repeat	<p>Repeat the notification message and continue list processing.</p> <p><b>NOTE</b> This action is only valid when initiated by a key in a <i>post-message</i> menu.</p>
Speak	<p>Speak a phrase or sentence and continue list processing.</p> <p><b>Parameter:</b> Phrase or sentence to speak.</p>
Transfer	<p>Set call result to TRANSFER and transfer the call.</p> <p><b>Parameter:</b> Transfer extension or a value substitution parameter. If a value is not provided, the default transfer extension is used.</p> <p><b>NOTE</b> Any custom call result value set by a previous <b>Call Result</b> action will be retained.</p> <p><b>NOTE</b> This action terminates action list processing.</p>
Undefined	Signifies that the action list item is undefined and will be skipped.
Voice Msg	<p>Record a voice message response and continue list processing.</p> <p>If a response is recorded and saved the call result is set to VM_REPLY.</p> <p><b>Parameter:</b> Message recipient subscriber mailbox number or a value substitution parameter. If a value is not provided, the default transfer mailbox is used.</p> <p><b>NOTE</b> Any custom call result value set by a previous <b>Call Result</b> action will be retained.</p>

# Telephone Administration


## Telephone User Interface Script

The telephone user interface (TUI) script can be used to initiate notifications to user lists, make recordings and perform system task commands from a remote location using a touch-tone telephone.

Administrators are configured using the application administration utility (refer to [Administrators Dialog](#)), and are tied to MiCollab AM subscriber mailboxes for security.

The TUI script is accessed from a call processor mailbox as described in the Launching the Telephone User Interface section of the *MiCollab AM Notify Installation Guide*.

Upon accessing the script, callers are prompted to enter an ID number and security code. The ID number entered must match a configured administrator and the corresponding MiCollab AM subscriber mailbox. The caller must enter the security code configured for the subscriber mailbox in order to gain access to the TUI script.

After successful sign-in, the menu options presented to the caller will depend on the permissions assigned to the configured administrator. At all menu levels, pressing the  (star) key will return the caller to the previous menu.

**NOTE** On systems licensed for multi-tenanting, the administrator must dial into a MiCollab AM line assigned to the appropriate tenant.

## Initiate Notifications

If the administrator has been granted the **Initiate Notifications** permission, this menu choice will be available. For more information about administrator permissions, refer to the [Add/Edit Administrator Dialog](#) section.

Administrators may be able to specify zero or more of the following configuration elements in the order shown. The elements available for selection depend upon the data fields included in the import file fields list and the permissions granted to the administrator. Data and settings for elements not included or available will be derived from the applicable control set. When all available elements have been configured, the resulting configuration will be spoken to the administrator for confirmation.

## Control Set

If the [Control Set](#) field is included in the import file, and the administrator has been given permission to access all control sets, the administrator will be prompted to enter a control set ID. Control sets available for selection from the telephone must have an ID that consists of all numeric digits. For more information about administrator permissions, refer to the [Add/Edit Administrator Dialog](#) section.

Administrators will not be prompted to specify a control set if the administrator is configured for access to a specific control set, or if the **Control Set** field is not included in the import file.

The default control set will be used if the **Control Set** field is not included in the import file.

## User List

Unless the administrator's permission is limited to a specific user list, the administrator will be prompted to enter a list ID number. Notifications will be scheduled for all users contained in the list. For more information about administrator permissions, refer to the [Add/Edit Administrator Dialog](#) section.

## PIN

If the [PIN](#) field is included in the import file, the administrator will be prompted to specify whether users should be required to enter a PIN prior to hearing the notification message.

When requiring PINs, users' PINs that are specified in the selected user list will be included in the resulting call import file. Users for which a PIN has not been specified in the user list will not be required to enter a PIN.

## Message

If the [Message](#) field is included in the import file, the administrator will be prompted to enter a message ID number. Administrators may also choose to use the default message if a default message is specified in the control set.

The default message as configured in the control set will be used if the **Message** field is not included in the import file. In this scenario, an error message will be played to the administrator if the default message is not configured.

## Machine Message

If the [Machine Message](#) field is included in the import file, the administrator will be prompted through the process of specifying a machine message. The **Leave Message** setting in the control set affects the machine message options available to the administrator.

When the **Leave Message** option is activated, the administrator can choose to specify an alternate machine message or play the same message to recipients and answering machines. Regardless, a message must be specified.

When the **Leave Message** option is not activated, the administrator can choose whether messages should be left if an answering machine is detected. If a machine message is not specified, a message will not be left.

When choosing a machine message, the administrator will be prompted to enter a message ID number. Administrators may also choose to use the default machine message if a default machine message is specified in the control set.

If the **Machine Message** field is not included in the import file, the behavior will be determined by the control set configuration. Refer to [Attempt Detection](#) for additional information.

## Start Date

If the [Start Date](#) or [Start DateTime](#) field is included in the import file, the administrator will be prompted to enter the date on which notifications should begin. Date entries must be six digits in length and consist of the two-digit month, two-digit day, and two-digit year. Dates earlier than the current date are not allowed.

The current date will be used if neither the **Start Date** nor **Start DateTime** field is included in the import file.

## End Date

If the [End Date](#) or [End DateTime](#) field is included in the import file, the administrator will be prompted to enter the date on which notifications should end. Date entries must be six digits in length and consist of the two-digit month, two-digit day, and two-digit year. Dates earlier than the start date are not allowed.

The start date will be used if neither the **End Date** nor **End DateTime** field is included in the import file.

## Start Time

If the [Start Time](#) or [Start DateTime](#) field is included in the import file, the administrator will be prompted to enter the time at which notifications should begin. Time entries must be four digits in length and consist of the two-digit hour and two-digit minute. 24-hour time format entries are supported and the administrator will be prompted to specify AM or PM as appropriate.

The default start time as configured in the control set will be used if neither the **Start Date** nor **Start DateTime** field is included in the import file.

## End Time

If the [End Time](#) or [End DateTime](#) field is included in the import file, the administrator will be prompted to enter the time at which notifications should end. Time entries must be four digits in length and consist of the two-digit hour and two-digit minute. 24-hour time format entries are supported and the administrator will be prompted to specify AM or PM as appropriate.

The default start time as configured in the control set will be used if neither the **End Date** nor **End DateTime** field is included in the import file.

## Result Tracking

If the [Result Tracking](#) feature is enabled for the control set, the administrator will be prompted to enter a value for the maximum number of affirmative responses to accept.

## Manage Recordings

If the administrator has been granted the **Manage Recordings** permission, this menu choice will be available. This menu choice is contained in the **Administrative Options** sub-menu.

Administrators that have been granted permission to access all control sets will be prompted to enter the control set ID to use for recording. The control set specifies the speech folder in which recorded message phrases will be contained.

The application will prompt the administrator to enter a message ID number. If the message phrase exists, it will be played and the administrator will be given the option to delete or rerecord the message phrase. If the message phrase does not exist, the administrator will be given the opportunity to create it.

After the message phrase has been recorded, the options listed in the following table are available.

Table 60. Manage Recording Options

Option	Description
Save	Save the recording as described in <a href="#">Telephone-Recorded Phrase Files</a> .
Review	Listen to the recording.
Rerecord	Discard the recording contents and start recording again from the beginning.
Append	Add additional recorded content to the end of the recording.
Quit	Cancel message phrase recording.

## Perform Tasks

If the administrator has been granted the **Perform Tasks** permission, this menu choice will be available. This menu choice is contained in the **Administrative Options** sub-menu. The available tasks correspond to buttons on the **Tasks** tab of the application administration utility.

The system tasks listed in the following table can be performed.

Table 61. Task Options

Option	Description
Pause	Temporarily pause notification processing. Notifications already in progress will not be affected.
Resume	Resume notification processing after it has been paused.
Cancel Specific	Cancel notifications to a specific destination address.
Cancel Set	Cancel notifications using a specific control set.
Cancel All	Cancel all pending notifications.

## Notification Import Files

After the administrator has confirmed the campaign configuration, the script will create a notification import file. The import file will contain a record for each user in the selected user list. Each record will contain data fields as specified in the import file fields list.

The import file is created in the same folder as the **Import File** setting in effect for the control set in use, and is named NXTUlyymmddhhnnssxxx.csv, where yymmdd is the current date, hhnnss is the current time, and xxx is the MiCollab AM line number used by the administrator when initiating the campaign.

Refer to [Notification Import File](#) for additional information about import file processing.

## User List Files

The application uses precompiled user list files, also referred to as recipient list files, to support the initiation of notification campaigns through the application TUI. Administrators can be limited to a specific list file, or can be allowed to select from all available list files during campaign initiation.

The list files must be located in the folder specified by the **User Lists Folder** setting in effect for the control set in use. The files must be named LIST####.csv, where #### is the list number.

**For example:** LIST1234.csv

List numbers can range from one to four digits in length, and can consist of alphabetic characters or numeric digits. However, in order for administrators to select the list using the TUI the list number must consist of numeric digits only.

Each file is an ASCII text file with a single line of text for each user. Each line of text, or record, consists of a series of comma-separated data fields. As noted in the following table, supplying data in the **PIN** and **Txt Msg Recip Type** fields is optional. If the **Txt Msg Recip Type** field is used the record must still contain the **PIN** field comma separator, but the field can be empty.

**NOTE** In order to utilize the **PIN** and **Txt Msg Recip Type** fields, the fields must be included in the import file field list. Refer to [Management Settings](#).

Table 62. User List File Fields

Field Name	Description
Recipient ID	ID number that uniquely identifies the notification recipient.
Recipient Address	Notification recipient address. Content varies based on notification type.
PIN	PIN number (optional).
Txt Msg Recip Type	Text message recipient address type (optional); <b>SMS</b> , <b>SMTP</b> or <b>Mailbox</b> .

## Telephone-Recorded Phrase Files

Notification message phrases recorded by administrators using the [Manage Recordings](#) function of the [Telephone User Interface Script](#) are stored in the UCCconnect speech folder specified in the **Speech Folder** setting for the control set in use during the recording session. The **Speech Folder** setting appears on the [Options Tab](#) of the [Control Set Dialog](#).

The control set in use is determined by several factors as described in the [Control Set](#) section of the [Initiate Notifications](#) process.

The phrase files are named MSG####.wav, where #### is the message ID number specified by the administrator. Message ID numbers can range from one to four digits in length.

**For example:** MSG1234.wav

Administrators select the message phrase to use during a notification campaign by entering this message ID number. Any pre-recorded message phrase, whether it's recorded through the TUI or not, is available for selection if this naming convention is followed.

**NOTE** Phrases recorded through the TUI are stored in the audio format specified as the default recording format for voice messages in MiCollab AM.

# Notification Import File

The list administrator provides the notification import file to the MiCollab AM Notify application. The **Import File** setting on the [Settings Tab](#) of the application administration utility specifies the file name and location. The use of multiple character (\*) and single character (?) wildcards to specify multiple files is supported.

**NOTE** The import file location can be overridden for individual control sets using settings in the [Management Overrides Group](#) for the control set.

MiCollab AM Notify checks for the existence of import files at the frequency specified by the **Monitor Interval** setting in the MiCollab AM Notify Services Configuration program (see the *MiCollab AM Notify Installation Guide* document for details). If a file is found the records contained in the file are imported and appended to the list of pending notifications. The import file is then renamed with an extension of *.old*.

A notification import file is an ASCII text file with a single line of text for each call attempt. Each line of text, or record, consists of a series of comma separated data fields. If a data field value includes a comma character, the entire contents of the field must be enclosed in double-quotes.

The contents and order of the fields in each record are specified using [Import File Fields Dialog](#), which is accessed by pressing the **Specify Fields** button on the [Settings Tab](#) of the application administration utility.

The only required data fields are [Recipient Address](#) and [Recipient ID](#). Default values specified on the [Defaults Tab](#) of the [Control Set Dialog](#) can be used in place of all other importable call settings.

When import files are supplied to the application, each data record must include all selected fields. However, the fields do not have to be populated with actual data values as long as the comma separators are present. If a data value is not supplied, the defaults configured for the control set will be applied.

**NOTE** The fields included in the import file directly determine the data elements that can be specified by administrators when initiating notifications through the telephone user interface (refer to [Telephone User Interface Script](#)).

## Import File Fields Dialog

The **Import File Fields** dialog is used to configure the data fields included in each record in the notification import file, as well as the order in which the fields appear.



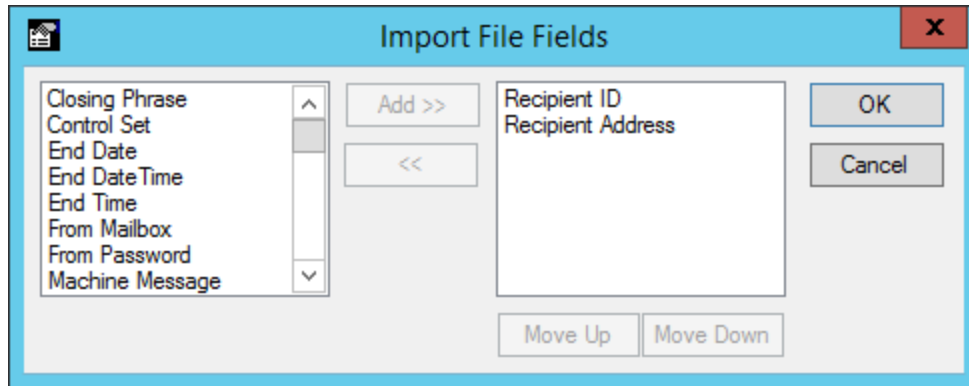


Figure 27. Import File Fields Dialog

A list of all available data fields, in alphabetical order, appears on the left-hand side of the dialog, and a list of the selected fields and the order in which they will appear in import records appears on the right-hand side.

Moving fields from one list to the other is accomplished using the **Add>>** and **<<** (remove) buttons. Altering the order in which the fields will appear in the import records is accomplished using the **Move Up** and **Move Down** buttons.

## Data Field Listing

Table 63. Import File Data Field Listing

Item	Description
Closing Phrase	Phrase or sentence to speak prior to ending an outbound notification call.
Control Set	ID of the control set to use for the notification.
End Date	Date on which notification attempts should end.
End DateTime	Date and time at which notification attempts should end.
End Time	Time of day at which notification attempts should end.
From Mailbox	Call processor or subscriber mailbox used to specify switch section for calls and origination of voice messages.
From Password	Security code for the <b>From Mailbox</b> , if required.
Machine Message	Phrase file or sentence specifying the notification message to speak when an answering machine is detected.

Item	Description
Menu Phrase	Phrase file or sentence to speak after the notification message that contains a menu of options.
Message	Notification message content. Consists of a phrase file or sentence for <b>Callout</b> and <b>Voice Msg</b> notifications. Consists of text content for <b>Text Msg</b> notifications.
PIN	Numeric security code that must entered to access the notification message.
PIN Prompt	Phrase file or sentence to speak when PIN input is required.
Presence Prompt	Phrase file or sentence to speak to establish presence of a call recipient.
Prevent Interrupt	Controls whether call recipient can interrupt notification message playback.
Priority Weight	Priority weight value assigned to the notification.
Recipient Address	Notification recipient address. Varies based on notification type: <ul style="list-style-type: none"> <li>• <b>Callout</b> Telephone number to call.</li> <li>• <b>Voice Msg</b> Message recipient subscriber mailbox number.</li> <li>• <b>Text Msg</b> Address to which the text message will be sent.</li> </ul>
Recipient ID	ID number that uniquely identifies the notification recipient.
Start Date	Date on which notification attempts should start.
Start DateTime	Date and time at which notification attempts should start.
Start Time	Time of day at which notification attempts should start.
Transfer Extension	Extension to which the call should be transferred.
Transfer Mailbox	Subscriber mailbox to which voice message responses should be sent.
Transfer Mode	Controls if/how call transfers to extensions or voice message responses to MiCollab AM subscriber mailboxes are initiated.
Transfer Phrase	Phrase file to speak prior to initiating a call transfer.

Item	Description
<a href="#">Txt Msg Recip Type</a>	Text message recipient address type: <ul style="list-style-type: none"> <li>• <b>SMS</b> Address is a telephone number capable of receiving SMS messages.</li> <li>• <b>SMTP</b> Address is an email address that will relay text messages to a device capable of receiving SMS messages.</li> <li>• <b>Mailbox</b> Address is the number of a MiCollab AM subscriber mailbox configured to relay text messages to the subscriber.</li> </ul>
<a href="#">Unused1 – Unused5</a>	Up to 5 field placeholders that can be used to ignore fields in the import file.
<a href="#">Value0 – Value9</a>	Up to 10 fields that can be used to supply values that will be substituted for value placeholders within designated control set settings. Refer to <a href="#">Value Substitution Parameters</a> .

## Data Field Reference

### Closing Phrase

Description:	Phrase or sentence to speak prior to ending the call.
Value:	String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.
Default:	User configured.
Notes:	<p>The closing phrase will not be spoken if a value is not specified in the imported notification record and no default is configured.</p> <p>The closing phrase will not be spoken if the call is being transferred.</p> <p>Refer to <a href="#">Dialog Sentences</a> for sentence construction rules.</p>

### Control Set

Description:	ID of the control set to use for the call.
Value:	String matching a configured Control Set ID.
Default:	None.
Notes:	A control set contains values that control various aspects of notification processing, including default values to use for fields that are not contained in the imported notification record.

If a control set value is not supplied, or the supplied value does not match a configured control set, the default control set settings will be used.

## End Date

Description:	The date on which notification attempts should end.
Value:	String representing a valid date, e.g., mm/dd/yyyy.
Default:	Same value as the start date for a notification.
Notes:	Must be a value equal to or greater than the start date for the notification.

## End DateTime

Description:	The date and time at which call attempts should end.
Value:	String representing a valid date and time, e.g., mm/dd/yyyy hh:nn [am/pm].
Default:	Date is same value as the start date for the notification. Time is user configurable (refer to <a href="#">End Time</a> ).
Notes:	The date value must be equal to or greater than the start date for the notification. The time value must be greater than the start time for the notification. Time can be specified in 12 or 24-hour format (e.g., 9:30 pm or 21:30).

## End Time

Description:	The time of day at which notification attempts should end.
Value:	String representing a valid time, e.g., hh:nn [am/pm].
Default:	User configured.
Notes:	Must be a value greater than the start time for a notification. Can be specified in 12 or 24-hour format (e.g., 9:30 pm or 21:30).

## From Mailbox

Description:	Number of a MiCollab AM subscriber or call processor mailbox that specifies the appropriate switch section to use for outbound notification calls and/or origination of voice messages.
Value:	String representing a valid MiCollab AM subscriber or call processor mailbox.
Default:	User configured.

Notes: If a value is not provided, the first switch section listed on the **Switch Sections** tab of MiCollab AM Configuration will be used when placing outbound calls.

## From Password

Description: Security code for the MiCollab AM subscriber mailbox specified in the **From Mailbox** field.

Value: String consisting of the mailbox security code.

Default: User configured.

Notes: The security code value will exist in the import file as plain text, which may be a security concern. Care should be taken to limit the permissions of the subscriber mailbox accordingly.

## Machine Message

Description: Phrase or sentence specifying the notification message to speak when an answering machine is detected.

Value: String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.

Default: User configured.

Notes: If a default value is not configured, the value specified in the **Message** field of the record is used as the default.

This value only applies if answering machine detection is enabled.

If this value is supplied in the notification record, and an answering machine is detected, the script will leave a notification message regardless of the **Leave Message** setting. Refer to [Standard Call Dialog](#) for more information.

Refer to [Dialog Sentences](#) for sentence construction rules.

## Menu Phrase

Description: Phrase or sentence containing a menu of options to present to the call recipient after the notification message.

Value: String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.

Default: User configured.

Notes: There are six possible menu option variations. The variation presented to the call recipient depends on the **Transfer Mode** and **Offer Do Not Call List** settings in effect for the call.

Refer to [Recipient Options Menu](#) for more information.

The phrase or sentence specified must be appropriate for the combination of settings in effect for the call.

It is possible to have a menu option available, but not announced to the call recipient.

Refer to [Dialog Sentences](#) for sentence construction rules.

## Message

Description:	Phrase file or sentence specifying the notification message to speak.
Value:	String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.
Default:	User configured.
Notes:	Refer to <a href="#">Dialog Sentences</a> for sentence construction rules.

## PIN

Description:	Numeric security code that must entered to access the notification message.
Value:	String containing digits 0-9 only.
Default:	None.
Notes:	<p>If a PIN value is included in the notification record, the call recipient must enter the correct PIN to proceed to the call dialog.</p> <p>Related phrases and input retries can be configured on the <a href="#">Dialog Tab</a> of the <a href="#">Control Set Dialog</a>.</p>

## PIN Prompt

Description:	Phrase file or sentence specifying the prompt to speak when PIN input is required.
Value:	String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.
Default:	User configured.
Notes:	Refer to <a href="#">Dialog Sentences</a> for sentence construction rules.

## Presence Prompt

Description:	Phrase file or sentence specifying the prompt to speak to establish presence of a call recipient.
Value:	String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.
Default:	User configured.
Notes:	Refer to <a href="#">Dialog Sentences</a> for sentence construction rules.

## Prevent Interrupt

Description:	Whether to allow the call recipient to interrupt notification message playback by pressing a digit on the telephone keypad.
Value:	<b>Yes or No</b>
Default:	User configured.
Notes:	This setting applies only to the first presentation of the notification message. After the first presentation is complete, the call recipient may interrupt all subsequent speech playbacks.

## Priority Weight

Description:	Priority weight value assigned to the notification.
Value:	String containing a number between 0 and 9999.
Default:	User configured.
Notes:	Notifications with a higher priority weight value will be placed ahead of other notifications that are waiting to be processed. Refer to <a href="#">Notification Processing Order</a> for additional information.

## Recipient Address

Description:	Address of the notification recipient consisting of a telephone number, mailbox number or SMTP email address.
Value:	String containing alphanumeric address specification.
Default:	None.
Notes:	Required field.  For telephone and mailbox numbers, only the digits 0-9 are valid characters. All other characters will be removed from the data string.

## Recipient ID

Description:	An ID number that uniquely identifies the call recipient.
Value:	String containing alphanumeric ID number.
Default:	None.
Notes:	Required field. Used to correlate imported notification records with the resulting notification result records.

## Start Date

Description:	The date on which notification attempts should start.
Value:	String representing a valid date, e.g., MM/DD/YYYY.
Default:	Date on which notification import file is processed.
Notes:	None.

## Start DateTime

Description:	The date and time at which notification attempts should start.
Value:	String representing a valid date and time, e.g., MM/DD/YYYY hh:mm [am/pm].
Default:	Date on which notification import file is processed. Time is user configurable (refer to <a href="#">Start Time</a> ).
Notes:	Time can be specified in 12 or 24-hour format (e.g., 9:00 am or 09:00).

## Start Time

Description:	The time of day at which notification attempts should start.
Value:	String representing a valid time, e.g., hh:mm [am/pm].
Default:	User configured.
Notes:	Can be specified in 12 or 24-hour format (e.g., 9:00 am or 09:00).

## Transfer Extension

Description:	Telephone extension to which the call should be transferred.
Value:	String containing a valid telephone extension.
Default:	User configured.
Notes:	The application can be configured to use a blind or monitored transfer to connect the call recipient to the extension. Precautions should be made to ensure that a transfer to this extension will never result in a busy signal.



Only the digits 0-9 are valid characters. All other characters will be removed from the data string.

## Transfer Mailbox

Description:	Subscriber mailbox to which voice message responses should be sent.
Value:	String containing a valid subscriber mailbox number.
Default:	User configured.
Notes:	Only the digits 0-9 are valid characters. All other characters will be removed from the data string.

## Transfer Mode

Description:	Controls if/how call transfers or voice message responses are initiated.
Value:	One of the following words: <b>Yes</b> , <b>Prompt</b> , <b>Msg</b> , <b>MsgPrompt</b> , <b>No</b>
Default:	User configured.
Notes:	<p>A value of <b>Yes</b> will cause the call to be transferred immediately after completion of notification message playback. If a <a href="#">Transfer Extension</a> is not supplied in the call record, and the control set does not contain a default value, the transfer mode will be set to <b>No</b> by the script.</p> <p>A value of <b>Prompt</b> will allow the call recipient to select an option to transfer if a menu phrase is configured. If a menu phrase is not configured, <b>Prompt</b> and <b>Yes</b> behave identically.</p> <p>A value of <b>Msg</b> will cause the call recipient to be prompted to leave a voice message for the destination mailbox immediately after completion of notification message playback. If a <a href="#">Transfer Mailbox</a> is not supplied in the call record, and the control set does not contain a default value, the transfer mode will be set to <b>No</b> by the script.</p> <p>A value of <b>MsgPrompt</b> will allow the call recipient to select an option to leave a voice message response if a menu phrase is configured. If a menu phrase is not configured, <b>MsgPrompt</b> and <b>Msg</b> behave identically.</p> <p>A value of <b>No</b> will not allow a call transfer or voice message response.</p>

## Transfer Phrase

Description:	Phrase or sentence to speak prior to initiating a call transfer or voice message response.
Value:	String consisting of a pre-recorded phrase or a dialog sentence. For pre-recorded phrase files, the file extension .wav is assumed and must not be included.
Default:	User configured.

Notes: Spoken prior to automatic and user requested transfers and voice message responses.

## Txt Msg Recip Type

Description: Text message recipient address type.

Value: **SMS, SMTP** or **Mailbox**

Default: Determined based on the value of the **Recipient Address** field.

Notes: Only applicable when using a control set that specifies the **Text Msg** notification type.

A value of **SMS** indicates that the address is a telephone number capable of receiving SMS messages.

A value of **SMTP** indicates that the address is an email address that will relay text messages to a device capable of receiving SMS messages.

A value of **Mailbox** indicates that the address is the number of a MiCollab AM subscriber mailbox configured to relay text messages to the subscriber.

A properly configured MiCollab AM SMS provider must be configured in the control set [Text Messaging Group](#) for the recipient address type specified.

## Unused1 – Unused5

Description: Unused call record import field placeholders.

Value: Not applicable.

Default: Not applicable.

Notes: Field placeholder used to indicate a field or fields in call import records that should not be imported.

## Value0 – Value9

Description: Fields that can be used to supply values to be substituted for value placeholders within designated control set settings.

Value: String containing value appropriate for substitution into designated control set settings.

Default: Not applicable.

Notes: Refer to [Value Substitution Parameters](#) for additional information.

## Task Commands

Administrative task commands can be included in the notification import file. The administrative tasks available mimic the tasks available through the application administration utility. Supporting administrative tasks in the import file allows the tasks to be executed without requiring access to the application administration utility.

Task commands are not subject to the import field list configuration. Task commands can be mixed with import records, and are included as a single line of text in the import file as specified in the following table.

Table 64. Task Commands

Command	Description
PAUSE	Temporarily pause notification processing. Notifications already in progress will not be affected. This command does not accept additional parameters.
RESUME	Resume notification processing. This command does not accept additional parameters.
CANCEL, [Address], [Control Set]	Cancel pending calls to a specific recipient address, optionally within a specific control set. The recipient address parameter is required, and is separated from the command by a single comma. The control set parameter is optional, and is separated from the address parameter by a single comma.  <b>NOTE</b> If the command does not specify a control set, but is contained in a control set-specific import file, that control set will be assumed and will be the only control set affected (refer to <a href="#">Using Control Sets</a> ).

Command	Description
ABORT, [Control Set], [NotifyType]	<p>Cancel all pending notifications, optionally for a specific control set or notification type. The control set parameter is optional, and is separated from the command by a single comma. The notification type parameter is also optional, and is separated from the control set parameter by a single comma.</p> <p>Valid values for the NotifyType parameter are:</p> <ul style="list-style-type: none"> <li>• <b>NXOUT</b> Callout notification type.</li> <li>• <b>NXOUTMSG</b> Voice Msg notification type.</li> <li>• <b>NXOUTTXT</b> Text Msg notification type.</li> </ul> <p>Initiation of notifications will be paused while this command is processed.</p> <div> <p><b>NOTE</b> If the command does not specify a control set, but is contained in a control set-specific import file, that control set will be assumed and will be the only control set affected (refer to <a href="#">Using Control Sets</a>).</p> </div>
TRACK, [Control Set], [Limit]	<p>Establish or cancel a result tracking session for calls subject to a particular control set. Both the control set and limit parameters are required. The value for the control set parameter must be an existing control set that is configured for result tracking. The value for the limit parameter must be a numeric value consisting of the result tracking limit, or 0 to cancel result tracking for the control set along with any pending calls. After this command is processed, any import records specifying the target control set will be subject to the result tracking limitations until the result tracking session is completed or canceled.</p> <div> <p><b>NOTE</b> If the command does not specify a control set, but is contained in a control set-specific import file, that control set will be assumed and will be the only control set affected (refer to <a href="#">Using Control Sets</a>).</p> </div>

# Notification Results Files

MiCollab AM Notify generates notification results files as output. The notification results files are text files that contain raw data records; one record for each notification attempt. Multiple records will exist for a single notification in cases where multiple attempts are required to complete the notification. For example, a dialed telephone number was busy, not answered, or otherwise could not be reached and additional call attempts were allowed.

The results files can be viewed in native format using a text editor, but the records are formatted as comma-separated data fields for the purpose of being imported into an external database or spreadsheet program. By importing the data records into an external database or program, the data records can be sorted and queries can be developed to produce useful summary data and reports. MiCollab AM Notify includes a utility that can be used for this purpose; refer to [Results Reports](#).

A new results file is created each day. By default, the files are stored in the folder specified by the **Results Folder** setting on the [Settings Tab](#) of the application administration utility. However, individual control sets can override this default using the corresponding setting in the [Management Overrides Group](#) for the control set. The files are named NXYMMDD.csv, where YYMMDD is the year, month and day the file was created.

Historical results files are not automatically deleted by the application. Files can be manually moved or deleted as desired.

The current day results file should not be opened in-place in a separate application. This could lock the file and prevent the application from writing additional data to the file. To review the current day file, place a copy of the file in another location and open the copy.

Each file is an ASCII text file with a single line of text for each notification attempt. Each line of text, or record, consists of a series of comma-separated data fields.

## Data Fields

Table 65. Results File Data Fields

Field Name	Description
DateTime	Date and time of the attempt result record.
Recipient ID	Recipient ID number provided in the import file.
Recipient Address	Address to which the notification was sent. Content varies based on notification type.
Line Number	MiCollab AM line on which outbound call occurred.

Field Name	Description
Length	Call length in seconds, including the time required to dial the telephone number and determine call progress.
Result	Notification attempt result (refer to <a href="#">Result Values</a> ).
Rescheduled	Indicates whether the call will be attempted again.  Values: <ul style="list-style-type: none"> <li>• <b>0</b> No</li> <li>• <b>1</b> Yes</li> </ul>
TTS Result	Text-to-speech usage result. Value is a summation of all TTS elements attempted during the call. Thus, a failure result indicates that at least one attempt to speak an element using TTS failed.  Values: <ul style="list-style-type: none"> <li>• <b>0</b> Not requested or not enabled.</li> <li>• <b>1</b> Text successfully spoken.</li> <li>• <b>2</b> Failed due to wait timeout.</li> <li>• <b>3</b> Failed due to error.</li> </ul>
Control Set	ID of the control set used for the notification.
Notification Type	Type of notification processed:  Values: <ul style="list-style-type: none"> <li>• <b>0</b> Unknown</li> <li>• <b>1</b> Callout</li> <li>• <b>2</b> Voice Msg</li> <li>• <b>3</b> Text Msg</li> </ul>
Call GUID	Internal globally unique identifier for the notification.
Track GUID	Internal globally unique identifier for the result tracking session, if applicable.
Import Record	Copy of the data record for the notification as read from the import file. Included only in the result record generated when the notification is imported.

## Result Values

### Completed Results (Not Rescheduled)

The result values in the following table indicate that the notification has completed and no additional attempts will be made. The specific result denotes the condition under which the notification was completed.

**NOTE** As noted bellow, custom call result values implemented within custom menu actions are considered completed calls.

Table 66. Completed Results (Not Rescheduled)

Result	Description
COMPLETE	Call was connected, and notification message playback was completed.
DO_NOT_CALL	Call was connected, and call recipient asked to be removed from the calling list.
HANGUP	Call was connected, and was disconnected prior to the completion of notification message playback. Disconnect may have occurred during notification message playback or recipient PIN processing.
HANGUP_MSG	Answering machine was detected, but the call was disconnected before notification message playback was completed.
INTERRUPT	Call was connected, and the call recipient interrupted notification message playback by pressing a key. Message playback was not completed.
MESSAGE	Answering machine was detected, and a notification message was successfully left.
MESSAGE_CX	Voice message notification was successfully posted to a MiCollab AM subscriber mailbox.
MESSAGE_TEXT	Text message notification was successfully sent.
PIN_INVALID	Call was connected, but call recipient was unable to enter a valid PIN within the number of attempts dictated by the <b>PIN Input Retries</b> setting.
REJECTED	Call was connected, but call recipient elected to reject the call during presence verification.
TIMEOUT	Call was connected, but the call recipient did not respond to a prompt for PIN or options menu input. Result indicates that no DTMF input was received at any time during the call.

Result	Description
TRANSFER	Call was completed and a call transfer was initiated.
VM_REPLY	Call was connected, notification message playback was completed, and call recipient left a voice message response.
<Custom Result>	Call was connected and recipient ultimately chose a custom menu option indicating a customized call result value.

## Incomplete Results (Possibly Rescheduled)

The result values in the following table indicate that the notification attempt represented by the result record was not successfully completed. Additional attempts for the notification may be scheduled depending upon whether the maximum number of allowable attempts has been reached.

Table 67. Completed Results (Possibly Rescheduled)

Result	Description
BUSY_LINE	Call was not connected because the telephone number was busy.
DIALTONE	Call was not connected because dial tone was detected after the telephone number was dialed.
FAST_BUSY	Call was not connected because a reorder, or fast-busy, tone was detected after the telephone number was dialed.
MAX_GREETING	Call was connected, but the maximum greeting length of 30 seconds was exceeded. The greeting length is defined as the amount of continuous noise detected after the call was connected. This value is only possible when answering machine detection is enabled.
LINE_ERROR	Problem with the MiCollab AM outbound line allocated for the call.
NO_ANSWER	Call was not answered, or an answering machine was detected and the script was instructed not to leave a notification message.
NO_LINE	No MiCollab AM outbound line available for the call.
NOT_PRESENT	Call was connected, but recipient presence was not verified. Either the call was disconnected during presence verification, or a valid response to the presence prompt was not received within the number of attempts dictated by the <b>Presence Input Retries</b> setting.



## Incomplete Results (Not Rescheduled)

The result values in the following table indicate that the notification attempt represented by the result record was not successfully completed and will not be attempted again.

Table 68. Incomplete Results (Not Rescheduled)

Result	Description
CANCELED	Notification was canceled by the administrator.
ERROR	Unexpected error occurred during the notification.
EXPIRED	Notification was removed from the database before completion because the end of the notify period was exceeded.

## Import Status Results

The result values in the following table indicate the outcome of the attempt to import a notification record into the application database from the [Notification Import File](#).

Table 69. Import Status Results

Result	Description
IMPORT_ERROR	Notification record was not imported due to a data error. Additional information may be provided.
IMPORTED	Notification record was imported and scheduled.

# Results Reports

MiCollab AM Notify includes a utility that can be used to generate formatted reports from notification results files. Rather than running the utility on the MiCollab AM system, it is recommended that the utility be installed and used on a Windows workstation. This allows the utility to remain independent of the MiCollab AM system, and provides access to local printing resources. In addition, data and reports can be exported to other Microsoft Office programs residing on the workstation.

Notification results files generated by the application (refer to [Notification Results Files](#)) are imported into a local database on the workstation using commands within the utility. Users can then view the data in various forms and generate reports from the imported data.

See the *MiCollab AM Notify Reports* document for more information.

## Installing the Reports Utility

For information about how to install the **MiCollab AM Notify Reports** utility, see the *MiCollab AM Notify Installation Guide*.

# Application Phrase Listing

Prerecorded UCConnect application phrases exist on MiCollab AM Call Servers as individual WAV files in *CCITT u-Law, 8.000 KHz, 8 Bit, Mono* audio format. For additional information, see the UCConnect online book contained on the MiCollab AM Installation Media.

This section contains a listing of the pre-recorded default phrases supplied with the MiCollab AM Notify application. The files are named as shown in the following table and have a file extension of **.wav**.

Table 70. Application Phrases

Name	Verbiage
ConfirmPrompt	If this is correct, press 1. Otherwise, press 9.
DefaultClosingPhrase	Thank you. Goodbye.
DefaultMachineMessage	This is your outbound notification message. If you believe that you are not the intended recipient of this call we apologize and you may ignore this message.
DefaultMenu	To repeat this information, press 1. To end this call, press the star key.
DefaultMenuDNC	To repeat this information, press 1. To be removed from our calling list, press 2. To end this call, press the star key.
DefaultMessage	This is your outbound notification message. If you believe that you are not the intended recipient of this call we apologize and you may disconnect at any time.
DefaultRecordMenu	To repeat this information, press 1. To leave a message for a customer service representative, press 2. To end this call, press the star key.
DefaultRecordMenuDNC	To repeat this information, press 1. To leave a message for a customer service representative, press 2. To be removed from our calling list, press 3. To end this call, press the star key.
DefaultRecordPhrase	Please follow the prompts to record your voice message.
DefaultTransferMenu	To repeat this information, press 1. To speak with a customer service representative, press 2. To end this call, press the star key.

Name	Verbiage
DefaultTransferMenuDNC	To repeat this information, press 1. To speak with a customer service representative, press 2. To be removed from our calling list, press 3. To end this call, press the star key.
DefaultTransferPhrase	One moment please.
InvalidChoice	That is not a valid choice.
MakeSelection	You may make your selection at any time.
OutboundChime	Musical chime.
PauseShort	0.5 seconds of silence.
PINPrompt	You are receiving a secure notification message. Please enter your password, followed by the pound sign.
PINInvalid	The password you entered is not correct.
PresenceMenu	This is a notification call. To accept the call, press 1.
PresenceMenuDNC	This is a notification call. To accept the call, press 1. To be removed from our calling list, press 2.
PresenceMenuReject	This is a notification call. To accept the call, press 1. To reject the call, press 2.
PresenceMenuRejectDNC	This is a notification call. To accept the call, press 1. To reject the call, press 2. To be removed from our calling list, press 3.
RecipientID	Recipient ID...
RecipientTelephone	Recipient telephone...
VoiceMsgAppendPrompt	To continue recording, press 2.
VoiceMsgBeginAtTone	At the tone, begin recording.
VoiceMsgCancelled	Your message has been canceled.
VoiceMsgCancelPrompt	To cancel this message, press the star key.
VoiceMsgInvalidMailbox	That is not a valid mailbox number.
VoiceMsgMsgDiscarded	Your message has been discarded.
VoiceMsgRerecordPrompt	To discard your message and rerecord it, press 4.

Name	Verbiage
VoiceMsgReviewPrompt	To review this message, press 6.
VoiceMsgSendPrompt	To send your message, press 5.
VoiceMsgSent	Your message has been sent.
VoiceMsgStartPress2	To start recording, press 2.
VoiceMsgStopPress2	To stop recording, press 2 again.
VoiceMsgStopPressAny	To stop recording, press any key.
YouEntered	You entered...

# Implementing New Phrases

## Application Phrases

Prerecorded UConnect application phrases exist on MiCollab AM Call Servers as individual WAV files in *CCITT u-Law, 8.000 KHz, 8 Bit, Mono* audio format. For additional information, see the UConnect online book contained on the MiCollab AM Installation Media.

UConnect phrase files are recorded using a PC workstation equipped with a sound card and microphone. Numerous sound recording utilities are available and may be used as long as the required audio format is supported.

**NOTE** Application phrases can also be recorded via telephone using the [Manage Recordings](#) function of the [Telephone User Interface Script](#) as described in the [Telephone-Recorded Phrase Files](#) section. Phrases recorded in this fashion can be renamed after recording if desired.

New phrase files must be copied to the MiCollab AM Call Server while the MiCollab AM UConnect service is running. The default incoming speech folder for the MiCollab AM Notify application is:

```
...\CX\UConnect\Incoming\Speech\NXOUT
```

**NOTE** On multi-tenant systems, the incoming speech folders is:

```
...\CX\UConnect\tenant-data\<tenant-id>\Incoming\Speech\NXOUT
```

When a new phrase is copied to the incoming speech folder, UConnect will move the phrase into the production speech folder when it is safe to do so.

The default production speech folder is:

```
...\CX\UConnect\Speech\NXOUT
```

**NOTE** On multi-tenant systems, the production speech folders is:

```
...\CX\UConnect\tenant-data\<tenant-id>\Speech\NXOUT
```

Phrase files should not be copied directly to this folder when the MiCollab AM UConnect service is running.

**NOTE** In the above path specifications, the default MiCollab AM installation folder, **\CX**, is shown. If MiCollab AM is installed in a different folder, the actual installation folder should be used.

**NOTE** The above path specifications show the default script speech folder, **NXOUT**, as the final element in the paths. It is possible to configure the application to use alternate script speech folders. Refer to [Implementing New Phrase Folders](#) for more information.

## System Phrases

UCConnect includes a set of recorded system phrases that consists of numbers, letters, month names, day names, and other common phrases. These phrases are typically used to speak values (e.g., numbers, dates, dollar amounts) that are read from a database.

In some cases, it may be desirable to override the standard system phrases. This can be accomplished by implementing a phrase in the UCConnect system speech folder with the same file name as the system phrase.

System phrase file names and contents can be determined by reviewing the files located in the system speech folder:

```
...\CX\UCConnect\Speech\System
```

**NOTE** On multi-tenant systems, the production speech folders is:

```
...\CX\UCConnect\tenant-data\<tenant-id>\Speech\System
```

It is recommended that the files in this folder not be replaced, but rather overridden as needed. UCConnect scripts first look in the application speech folder for the phrase file. If the file is not found the script, UCConnect scripts then proceed to look in the system speech folder.

**For example:** To override the system phrase January, a phrase file named **January.wav** would be recorded and implemented in the application speech folder.

# Implementing New Phrase Folders

MiCollab AM Notify supports the ability to create and use alternate speech folders to contain the pre-recorded phrases spoken during notification calls. The speech folder to be used is specified in the control set applicable to the calls. Alternate speech folders are created using standard Windows methods.

## To create and prepare an alternate speech folder for use:

- 1 Create the required folders.
- 2 Copy the existing phrases to the new folder.

**NOTE** In the following instructions, the default MiCollab AM installation folder, CX, is shown. If MiCollab AM is installed on a different drive or in a different folder, the actual installation folder should be used.

## Create the Required Folders

In this step, both the production and incoming speech folders are created.

**NOTE** In the following instructions, multi-tenant folder paths are shown with <tenant-id> representing an internal MiCollab AM tenant ID number.

You can find the internal tenant ID numbers by clicking the **Tenant Info** button on the **UConnect Configuration** utility, which can be found in the Windows Control Panel.

## To create the required folders:

- 1 Open Windows File Explorer.
- 2 Navigate to the ...\\CX\\UConnect\\Speech folder.
- 3 Right-click in the folder, and then select **New > Folder**.
- 4 Type a name for the new speech folder.
- 5 Navigate to the ...\\CX\\UConnect\\Incoming\\Speech folder.

**NOTE** On multi-tenant systems, the folder is ...\\CX\\UConnect\\tenant-data\\<tenant-id>\\Speech.

**NOTE** On multi-tenant systems, the folder is ...\\CX\\UConnect\\tenant-data\\<tenant-id>\\Incoming\\Speech.

- 6 Right-click in the folder, and then select **New > Folder**.
- 7 Type the exact same name that was specified for the new speech folder above.



## Copy Existing Phrases

In this step, all required application phrases and user-recorded phrases are copied to the new incoming speech folder.

**NOTE** The MiCollab AM UConnect service must be running in order to complete this task.

### To copy existing phrases:

- 1** Navigate to the folder containing all of the application phrases listed in [Application Phrase Listing](#). This can be the folder in which the application was initially installed or another production speech folder used by the application.
- 2** Select the files for all of the phrases listed in Application Phrase Listing.
- 3** While pointing at one of the selected files, right-click, and then select **Copy**.
- 4** Navigate to the new incoming speech folder.
- 5** In the new incoming speech folder, right-click, and then select Paste. The phrases will be moved from the incoming speech folder to the production speech folder automatically.
- 6** Navigate to the folder containing the desired user-recorded phrases.
- 7** Select the files for the desired user-recorded phrases.
- 8** While pointing at one of the selected files, right-click, and then select **Copy**.
- 9** Navigate to the new incoming speech folder.
- 10** In the new incoming speech folder, right-click, and then select **Paste**. The phrases will be moved from the incoming speech folder to the production speech folder automatically.

# IP Integration Limitations

When placing outbound calls, MiCollab AM Notify relies on the ability of MiCollab AM to detect call progress. MiCollab AM determines the call progress and passes the information to MiCollab AM Notify. In IP-based integrations, the telephone system performs the call progress detection and may or may not pass noise-detection or silence-detection information to MiCollab AM. Whether this information is interpreted is also a function of the MiCollab AM software version and, potentially, the settings in effect for the MiCollab AM telephone switch integration.

In affected configurations, MiCollab AM features that rely on noise and silence detection do not function properly. Such features include the following: detection of fax tone; analog networking; IVR applications (including MiCollab AM Notify) that control sequences of events by monitoring noise and silence intervals; and call handling actions such as transfers and callouts to external telephone numbers.

If it appears that call progress detection is not functioning properly for MiCollab AM Notify calls, ask the MiCollab AM system administrator to check the integration settings related to call progress.

In cases where outbound calls are placed from an IP-integrated system that does not provide noise and silence detection, the telephone switch informs MiCollab AM, and thus MiCollab AM Notify, that the call is connected when an outbound trunk is seized for the call instead of when the call is actually answered.

Because of this, MiCollab AM Notify is unable to synchronize the beginning of the call dialog with the call being answered, and cannot distinguish between an answering machine and a human answer.

Two MiCollab AM Notify control set settings are provided to accommodate this scenario. These are the **Pause After Connect** and **Establish Presence** settings.

The **Pause After Connect** setting, in the [Callouts Group](#) on the [Control Tab](#) of the [Control Set Dialog](#), is used to delay the beginning of the call dialog for a period of time after the telephone switch has indicated that a connection has been made.

The **Establish Presence** setting, in the [Presence Verification Group](#) on the [Dialog Tab](#) of the [Control Set Dialog](#), is used to synchronize the remainder of the call dialog with a positive indication that a person has answered the call. Because the presence prompt may begin playing before a person answers the call, the presence verification **Input Retries** setting should be set higher than it would be set for a non-IP implementation.

# Application Shutdown Procedure

If there is a need to restart the **MiCollab AM Call Server**, the **MiCollab AM UCCONNECT Server service**, or the **MiCollab AM IVR Application Services** service while outbound calls are being processed the following procedure should be executed to properly shut down the MiCollab AM Notify application. Failing to properly shut down the MiCollab AM Notify application in a controlled manner may result in call result file inconsistencies and other unexpected consequences.

## To properly shut down the application:

- 1 Pause outbound call processing using the application administration utility or by issuing the **PAUSE** command in a call import file.

**NOTE** On a multi-tenant system, call processing must be paused for all tenants.

- 2 Stop the **MiCollab AM MiCollab AM Notify Services** service using the **MiCollab AM Notify Services Configuration** program or the Windows Services dialog.
- 3 Monitor the status of the MiCollab AM lines, waiting for all outbound calls to complete. Outbound calls generated by the application will display **Desktop** in the **MiCollab AM Line Status** application.

The MiCollab AM Call Server, the MiCollab AM UCCONNECT Server service, or MiCollab AM IVR Application Services service can then be safely shut down and restarted.

To restart just the MiCollab AM Notify application, as opposed to the entire server platform, after a proper shutdown as described above, restart the MiCollab AM Notify Services service and then resume outbound call processing using the application administration utility or by issuing the **RESUME** command in a call import file.

**NOTE** On a multi-tenant system, call processing must be resumed for all tenants.

# Monitoring and Troubleshooting

This section describes application monitoring and troubleshooting techniques and tools.

## View Notifications

The **View Notifications** dialog provides a real-time view of ongoing, scheduled and recently completed notifications, and is accessed by making the following selection from the application administration utility [Menu Strip](#):

**View > Notifications...**

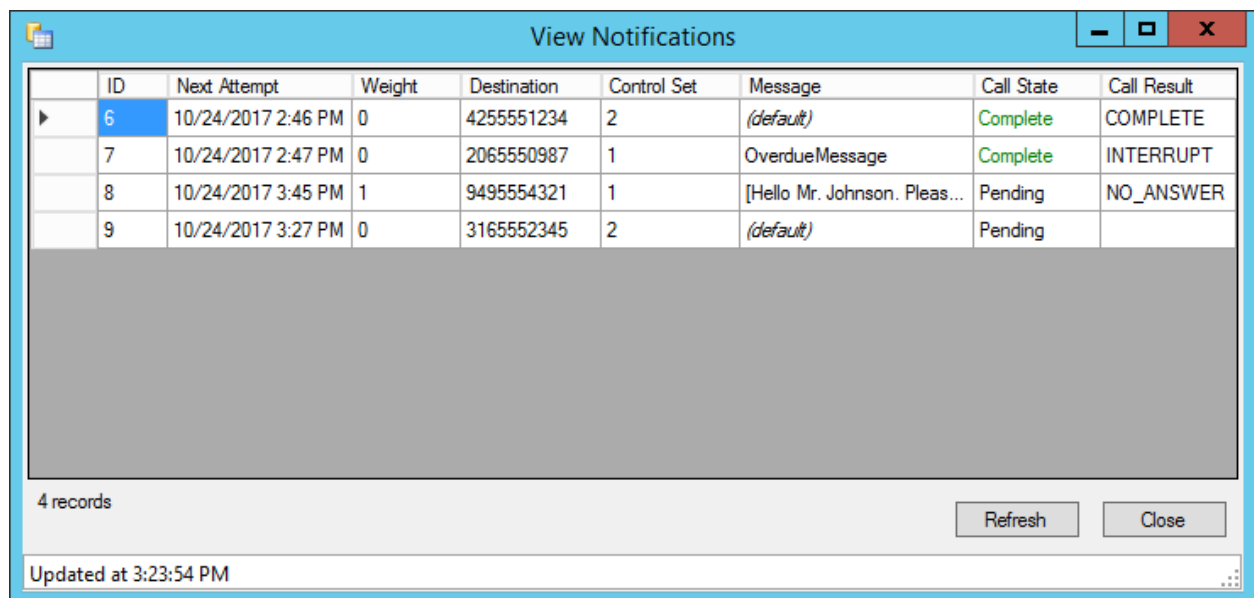


Figure 28. View Notifications

Table 71. View Notifications Grid Columns

Column	Description
ID	Internal call ID number.
Next Attempt	For pending notifications, the next date and time that the notification is eligible to be attempted.  For completed notifications, the date and time of the successful notification attempt.
Weight	Priority weight value assigned to the notification.

Column	Description
Destination	Notification recipient address. Varies based on notification type.
Control Set	ID of the control set used for the notification.
Message	Notification message content.
Call State	Current state of the notification. <ul style="list-style-type: none"> <li>• <b>Active</b> Notification currently being processed.</li> <li>• <b>Complete</b> Notification has been completed.</li> <li>• <b>Pending</b> Notification attempt scheduled to occur.</li> </ul>
Call Result	Notification attempt result. Refer to <a href="#">Result Values</a> .

**NOTE** Records for completed notifications are deleted from the database during the daily maintenance procedure.

## View Result Tracking Status

The **View Result Tracking Status** dialog provides a real-time view of the status of ongoing and recently completed result tracking sessions, and is accessed by making the following selection from the application administration utility [Menu Strip](#):

**View > Result Tracking...**

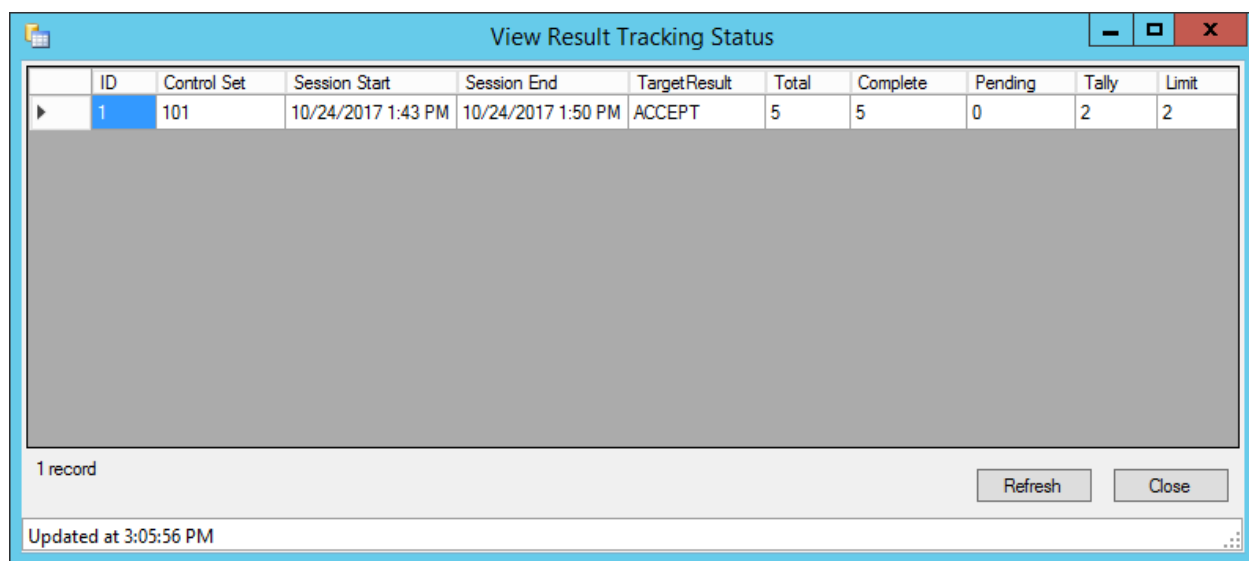


Figure 29. View Result Tracking Status

Table 72. View Result Tracking Status Grid Columns

Column	Description
ID	Internal tracking session ID number.
Control Set	ID of the control set used for the tracking session.
Session Start	Date and time the tracking session started.
Session End	Date and time the tracking session was concluded.
Target Result	Custom menu call result value being tracked.
Total	Total number of calls scheduled for the session.
Complete	Number of tracked calls that have been completed.
Pending	Number of tracked calls that have not been completed.
Tally	Number of times the target result has been achieved.
Limit	Maximum number of target result matches to accept.

**NOTE** Records for completed tracking sessions are deleted from the database during the daily maintenance procedure.

## Notification Result File

The application-maintained notification result files can be used to monitor the application. Each notification attempt generates an entry in the result file containing the call result. Result values of DIALTONE, ERROR, FAST\_BUSY, IMPORT\_ERROR, LINE\_ERROR and NO\_LINE can indicate that there is a problem. Refer to [Notification Results Files](#) for more information.

**NOTE** The current day call result file should not be opened in-place in a separate application. This could lock the file and prevent the application from writing additional data to the file. To review the current day file, place a copy of the file in another location and open the copy.

## Placing Test Calls

Scheduling one or more test calls can aid in verifying application behavior, and in troubleshooting potential issues. Test calls can be scheduled in two ways:

- 1 Using the **Schedule** button on the **Tasks** tab of the application administration utility.
- 2 Supplying a properly formatted call import file containing one or more call records.

When scheduling a test call, make sure that the call start and end times are configured or specified such that the test call will be placed at the expected time.

## Application Trace Files

Application trace files are the repository for error messages generated by the MiCollab AM Notify IVR scripts, and can be used to monitor related events and activity. Low-level debugging information can be collected to aid in issue diagnosis.

Trace files are facilitated by the MiCollab AM IVR Application Services Windows service. The IVR Application Services applet in the Windows Control Panel on the MiCollab AM Call Server, and the UCCconnect Remote Server if applicable, contains settings related to trace files. For additional information, see the *MiCollab AM Notify Installation* document.

**NOTE** Application trace files are maintained separately on all systems on which the service is running.

### Trace File Settings:

File Path	Full path to the folder in which the daily trace files are stored. Default is the ...\\CX\\Log folder.
Retention	Number of days that trace files are retained before being purged. Default is 10 days.
Level	Level of information maintained in the trace files. Default is Event level.
Clear	Clicking this button will clear the trace file for the current day.

**NOTE** Debug level tracing should not be enabled unless required. Enabling Debug level tracing may adversely affect system performance.

### Trace File Format:

A new trace file is automatically created each day. Trace files are named trYYMMDD.txt, where YYMMDD is the year, month, and day during which the data was recorded. Each application entry in the trace file consists of the following data:

Event Date, Event Time, Telephone Line Number, Process ID, Event Message

The event message will include the name of the process that generated the event, along with event specific information. The event message may also include a label of ERROR or WARNING. Special attention should be paid to messages with either of these labels.

## Problem Scenarios

### ***Notification import file is not being processed.***

- Verify that the correct file name and location is specified in the **Import File** setting on the [Settings Tab](#) of the application administration utility, and in the [Management Overrides Group](#) for each control set in case the setting has been overridden.

- Ensure that the **MiCollab AM Notify Services** service is started.
- If UCCconnect scripts are executing on a remote platform, verify that the system clock on the remote platform is synchronized with the system clock on the MiCollab AM Call Server. Both UCCconnect services must be restarted after synchronizing the clocks.
- Review the application trace file for error messages pertaining to the **NXMON** script. If necessary, enable debug level tracing and recreate the problem.

***Errors are generated during notification import file processing.***

- Verify that the import file contains all fields expected by the application, and that the fields are in the correct order. The expected fields are specified by clicking the **Specify Fields** button on the [Settings Tab](#) of the application administration utility. Refer to [Import File Fields Dialog](#).
- Review the application trace file for error messages pertaining to the **NXMON** script. If necessary, enable debug level tracing and recreate the problem.

***Line errors are occurring on outbound calls.***

- Verify that there are sufficient MiCollab AM lines enabled for callouts. The number of lines enabled for callouts must be equal to or greater than the value of the **Total Sessions** resource limit setting in effect for the tenant as specified in the MiCollab AM Notify Services Configuration program.
- Check the MiCollab AM integration Switch Sections configuration for restrictions on the number of simultaneous callouts.
- Check the **Originating Mailbox** setting for the control set applicable to the outbound calls. If a mailbox is specified, ensure that a call processor mailbox with the corresponding mailbox number exists and that the switch section specified in the call processor mailbox has lines enabled for callouts.
- Check the physical lines connected to the MiCollab AM system from the switch. Ensure that dial tone can be obtained, and that calls can be manually placed from a telephone handset connected to the lines.
- Review the application trace file for error messages pertaining to the **NXOUT** script. If necessary, enable debug level tracing and recreate the problem.

***Calls are being placed on fewer simultaneous ports than expected***

- Check the **Max Call Sessions** setting on the [Settings Tab](#) of the application administration utility, and in the [Management Overrides Group](#) for each control set in case the setting has been overridden.
- Verify that the value of the **Total Sessions** resource limit setting in effect for the tenant as specified in the MiCollab AM Notify Services Configuration program is equal to the number of licensed UCCconnect Ports.
- Verify that there are sufficient MiCollab AM lines enabled for callouts. The number of lines enabled for callouts must be equal to or greater than the value of the **Total Sessions** resource limit setting in effect for the tenant as specified in the MiCollab AM Notify Services Configuration program.
- Check the MiCollab AM integration Switch Sections configuration for restrictions on the number of simultaneous callouts.

***Outbound calls are not being completed.***



- Verify that the telephone numbers being dialed pass the MiCollab AM dialing instructions configuration.
- Check the External Call Dialing Template for the MiCollab AM integration.
- Check the **Dial Prefix** setting for the control set applicable to the outbound calls. Ensure that this does not duplicate the External Call Dialing Template configured in MiCollab AM.
- Ensure that an outbound call can be manually placed from a telephone handset connected directly to the MiCollab AM callout-enabled lines.
- Review the application trace file for status messages pertaining to the **NXOUT** script. If necessary, enable debug level tracing and recreate the problem.

***Call transfers are not working.***

- Check the MiCollab AM dialing instructions configuration to ensure that the destination extension will be processed properly.
- Check the PBX Internal Dialing Template for the MiCollab AM integration.
- Verify that MiCollab AM can perform a blind or monitored transfer to the destination extension.
- Verify that the **Transfer Type** setting on the [Control Tab](#) of the [Control Set Dialog](#) is properly configured.
- Verify that the **Transfer Hangup Delay** setting on the [Control Tab](#) of the [Control Set Dialog](#) is properly configured.
- Review the application trace file for status messages pertaining to the **NXOUT** script. If necessary, enable debug level tracing and recreate the problem.

***Connections and busy signals are not being detected properly.***

- Review, test and adjust the MiCollab AM call progress settings for outbound calls. The application relies on MiCollab AM for call progress detection.
- Review the application trace file for status messages pertaining to the **NXOUT** script. If necessary, enable debug level tracing and recreate the problem.
- If an IP-based integration is in use, audio call progress may not be supported. Refer to [IP Integration Limitations](#).

***Message phrases recorded by administrators using a telephone are not playing properly.***

- If the message phrase names are being spelled (or spoken using text-to-speech) during the notification call, check to ensure that the control set used by the administrator when creating the recordings specifies the same speech folder as the control set used during the notification calls.

***Message phrases recorded by administrators using a telephone are of poor quality.***

- Check the default recording format for messages on the MiCollab AM system, and increase the audio format quality if feasible.
- Have the administrator making the recordings try a different telephone set.

***Voice message notifications are not being delivered.***

- Verify that the **Origination** settings on the [Defaults Tab](#) for the control set specify a valid MiCollab AM mailbox.
- Verify that the **Phantom Ext.** setting in the [System Settings](#) dialog contains a value that will pass the MiCollab AM Dial Plan rules.