

MiCollab Advanced Messaging Auto Attendant Scheduling Administration Guide

For version 9.0 and above

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Contents

Preface	5
References	5
Documentation	5
Documentation Updates	5
Help	6
Document Conventions	6
Schedule Mailbox Overview	7
Manage multiple auto attendant scheduling easily	8
Visualize scheduling with the ability to test schedules	8
Easily manage schedule overrides	8
Anyone with the administrator permission can manage a Schedule Mailbox	8
Manage multiple virtual locations through the centralized system	9
Configuring System Configuration	10
Configuring Locations	10
Configuring Call Routing	13
Configuring Schedule Override Rules	15
Turning On/Off Manual Overrides	17
Through System Configuration	17
Through TUI	18
Through MiCollab AM Mobile Admin	19
Testing Call Routing	19
Configuring a Schedule Mailbox	21
Setting up a New Schedule Mailbox	22
Configuring Weekly Schedule	23
Configuring Schedule Overrides	29
Exploring the Schedule Overrides Tab	30
Adding or Editing Schedule Override Rules	31
Configuring Manual Overrides	33
Exploring the Manual Overrides Tab	33
Adding or Editing Manual Override Rules	34

Notes on Upgrading the System	37
Considerations	37
Upgrade Case Scenario	38
Importing MiCollab AM Scheduler Data	40
Importing MiCollab AM Scheduler CSV File	40
Exploring the Conversion Editor	41
Definition of Colors Used in the Conversion Editor	44
Using Directives in MiCollab AM Scheduler File	45
Editing Rules	46
Viewing and Editing Schedule	46
Filtering Table 2	47
Displaying Different Views in Table 2	47
View Types	47
Committing Excluded Items	48
Finishing up Conversion	49

Preface

This guide provides administrative instructions on how to configure auto attendant scheduling and managing schedule overrides. This guide assumes you have a basic understanding of MiCollab AM Admin, MiCollab AM Configuration, and how auto attendant scheduling works.

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 documentation set for this MiCollab AM includes the following documents and resources:

- **Developer Resources.** Contains programming guides and API references for developers for integrating the server clients and web applications with MiCollab AM.
- **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.
- **Quick Reference Card (QRC).** Contains shortcuts and quick instructions telling subscribers how to access and use the messaging system.
- **Server Documentation.** Available as a PDF only. Contains administrative guides for administrators about installing, configuring, and administering the messaging system, and user guides for subscribers about accessing the messaging system and checking and sending messages.
- **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: connect.mitel.com/connect

Help

The primary source of information about MiCollab AM is the online help available within any of its administrative utilities. You can access **Help** as follows:

- Click the **Help** button in the dialog box or window in which you are working
- Press the **F1** key at any time.

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.** *Italics* fonts can also signify the titles of other documents.

Example: See the *System Installation and Configuration Guide*.

- **UI Element Names.** Names of UI elements such as dialog windows, screens, menu items, tabs, buttons, icons, etc. 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 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.

Schedule Mailbox Overview

Auto Attendant Scheduling, via Schedule Mailboxes, is a feature that allows the definition of various auto attendants that will be applied based on time, day, date and location. Auto Attendant Scheduling will automatically define different auto attendants under different conditions.

Auto Attendant Scheduling is implemented via Schedule Mailboxes, independent mailboxes that encapsulate the abilities to perform multiple Auto Attendant Scheduling all in one location.

Inside each Schedule Mailbox is a weekly calendar for defining the default schedule for that mailbox, automated exceptions to that schedule, such as regularly occurring holidays, and manual overrides for probable requirements that may not be entirely predictable, such as weather-related closures.

For information on how this feature differs from versions prior to MiCollab Advanced Messaging (MiCollab AM) 9.0, refer to [the Notes on Upgrading the System](#) section of this document.

The following figure illustrates an example of the flow that a call can go through via the use of Schedule Mailboxes.

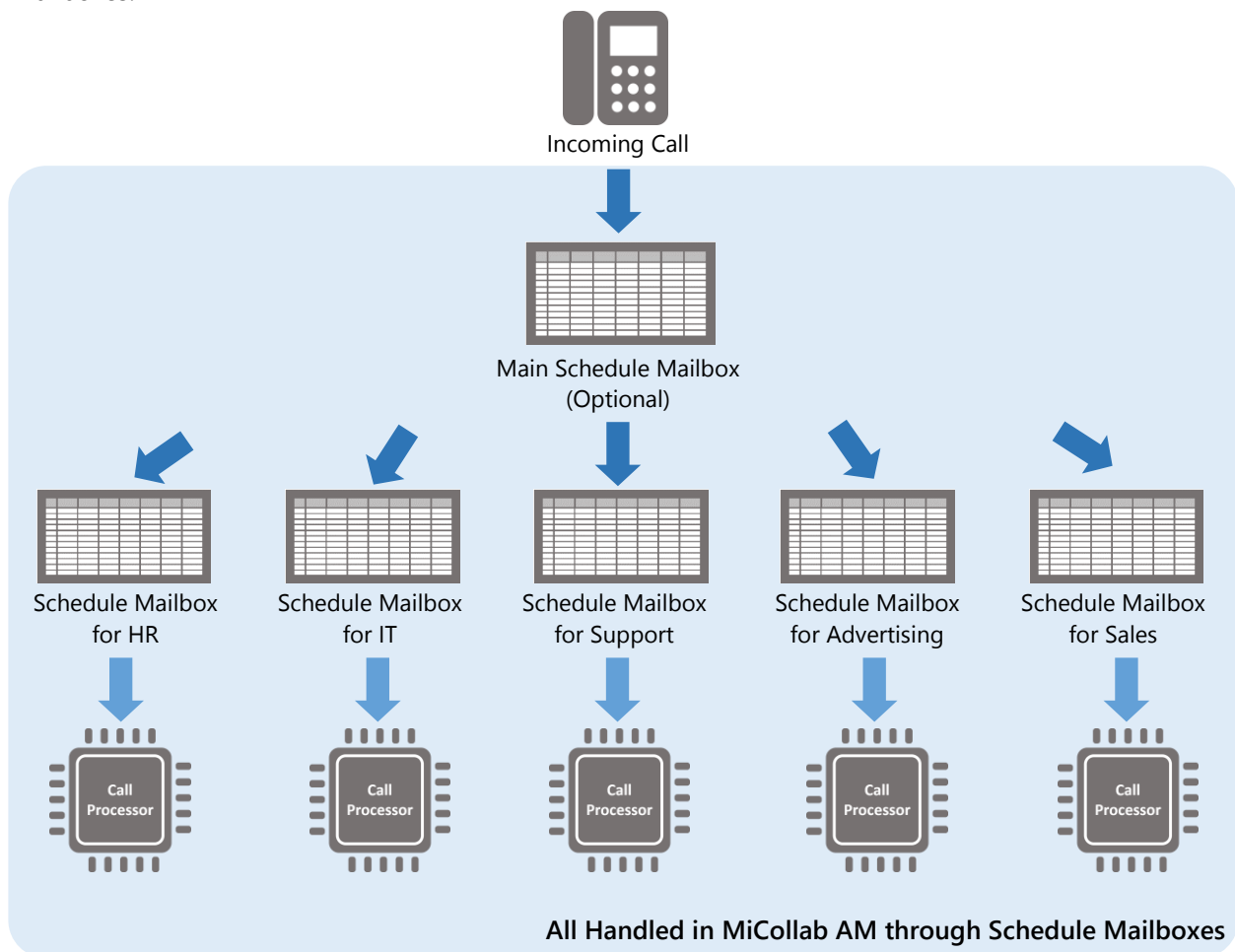


Figure 1. Flow of Call through Schedule Mailbox

Auto Attendant Scheduling through Schedule Mailbox offers powerful features that can evolve with your organization's needs and structure. A sound understanding of the design intent and functionality of the various aspects of these features will help you to design and implement schedules that will better serve the needs of your organization.

Before getting started, read some of the advantages of using Schedule Mailbox for your organization's auto attendant scheduling.

Manage multiple auto attendant scheduling easily

By creating a schedule mailbox for each department or task, which can function differently from each other, auto attendant scheduling can be managed easily and:

- Create a schedule mailbox for each department or by each task to handle calls differently.
- Manage calls differently depending on locations.
- Set or clear schedule overrides for the system or for a schedule mailbox through various methods.

Visualize scheduling with the ability to test schedules

Through the color-coding of each call handling mailbox assignment within the time grids and the drag-and-drop mechanism used for assignments, schedules can be configured and visualized clearly and easily.

- With just several clicks, the whole weekly schedule can be configured within a minute.
- Each assignment is distinguished by colors, so it's easy to visualize which time blocks share the same call handling mailbox.
- Through the Test feature, test schedules in advance and verify if the system is handling calls as intended.

Easily manage schedule overrides

From the system-wide overrides to the Schedule Mailbox specific override, the schedule overrides can be set or cleared easily.

- **Schedule Overrides:** Any predefined (pre-scheduled) events such as national holidays, organization-specific holidays, etc. that will override any weekly schedule when the system calendar reaches that date.
- **Manual Overrides:** Any unexpected event that may occur at any time or day such as snow day, power outage, etc. Manual overrides can be set/cleared at any time or date through the System Administration, telephone, or Mobile Admin and override any existing schedules.

Anyone with the administrator permission can manage a Schedule Mailbox

If MiCollab AM is deployed as a hosted solution in the cloud, the tenant administrator has the authorization over the tenant settings and can delegate the permission to access schedule mailboxes to selected subscribers. If MiCollab AM is deployed as a non-hosted solution in the cloud, the administrator

has the authorization of the system and has the access to manage all system-wide overrides. However, any subscriber with the permission to access schedule mailbox can manage the schedule mailbox, which can reduce the burden of the System Administrator to manage all Schedule Mailboxes in the system.

- System Administrator (if MiCollab AM is deployed as a non-hosted solution in the cloud):
 - Has full administrative rights to the MiCollab AM system.
 - Manage all overrides in the system and all schedule mailboxes.
 - Assign security code for each schedule mailbox.
- Tenant Administrator (if MiCollab AM is deployed as a hosted solution in the cloud):
 - Manage all overrides in the system and all schedule mailboxes.
 - Assign security code for each schedule mailbox.
- Schedule Mailbox Administrator:
 - Can be any subscribers with the permission (security code) to access such schedule mailbox.
 - Modify private schedules or perform overrides within the authorized schedule mailbox.
 - Cannot add/delete/modify system-wide schedule overrides.
 - A Schedule Mailbox may have more than one administrator.

Manage multiple virtual locations through the centralized system

For centralized systems that service multiple locations, the location of the Call Routing entry can be set differently than the location of the underlying switch section.

This allows an Auto Attendant to be virtually located anywhere in the world regardless where the call servers reside. And then the schedules in Schedule mailboxes can be configured based on the virtual location of the auto attendant.

For example:

If the company has an office in Paris with that has a local phone number that forwards to the centralized system in London, the Schedule mailbox for the Paris Auto Attendant can be configured using Paris time instead of London time. While the Schedule mailbox for the London office can be configured using London time.

Configuring System Configuration

The first step to configuring scheduling is to set up the **System Configuration** under the **MiCollab AM Admin** utility. These steps must be performed to create the entries and data required in subsequent process steps for Schedule Mailbox.

- Add Location(s).
- Configure Call Routing.
- Add Schedule Override Rule. (Optional in this phase.)

In order to configure the options above, open **MiCollab AM Admin**, and then go to **Configuration > System...** and follow the procedures detailed in this chapter.

Configuring Locations

Before configuring the locations for Auto Attendant Scheduling, explore the **Locations** tab and its elements where the location is configured.

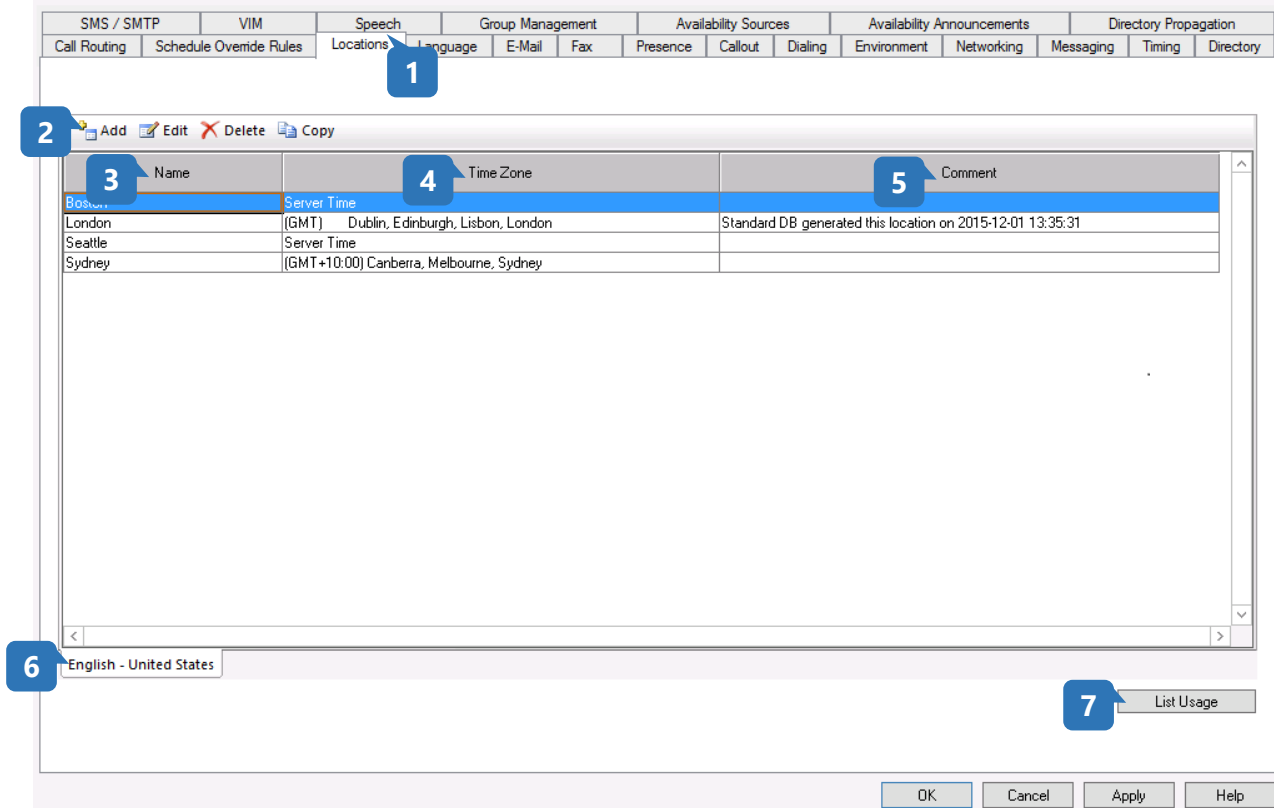


Figure 2. Locations Tab

- (1) **Locations Tab.** Click this tab to access or change location information.
- (2) **Editing Controls.** Click **Add**, **Edit**, **Delete** or **Copy** to add, edit, delete, or copy a location.
- (3) **Name.** The name of the location to which you will assign an Auto Attendant Schedule.
- (4) **Time Zone.** Enter a specific time zone for the location, or define the time zone as the same as *Server Time*.
- (5) **Comment.** Enter comments about the location here. If the locations were created during a system upgrade, additional information about the data used to automatically create the location will be placed here. A system upgrade will not change any comments that were entered previously.
- (6) **Language.** Displays the language prompt set that is being used.
- (7) **List Usage.** Select a location from the table and click the **List Usage** button to view where the selected location is being used. The **Location Usage** dialog box looks like the following.

Location Usage

a Location: Seattle

b Schedule Mailbox Use:

Mailbox	Name
0500	MAIN SCHEDULE

c Call Routing Use:

Service Number	Service Type	Service Comment
	Default Answer	Standard DB generated this mailbox on 2016-02-17 12:5..

d Switch Section Use:

Server Name	Switch Section Name
BVT2k12Install6	Asterisk Asterisk Section

OK Cancel

Figure 3. Location List Usage Dialog

- (a) **Location.** The selected location.
- (b) **Schedule Mailbox Use.** The name and mailbox number for any Schedule Mailboxes assigned to the selected location.

- (c) **Call Routing Use.** The service number, service type, and comments associated with the selected location.
- (d) **Switch Section Use.** The server name and switch section name associated with the selected location.

To configure locations:

Before configuring locations, you will need to have a recording of the location name available for all languages installed and configured on the system.

- 1 Open *MiCollab AM Admin* by either double-clicking the desktop icon or browsing to **Start > All Programs > MiCollab AM Desktop > MiCollab AM Admin**.
- 2 Enter the **Username** and **Password**.
- 3 Click the **Configuration** menu and select **System...** The System Configuration screen appears.
- 4 Click the **Locations** tab.
- 5 Click **Add**.
- 6 Enter the name of the location in the **Display Name** field. The text will also appear in the **Phrases** field.
- 7 Under Speech Properties, click the **Advanced Options** tab.
- 8 Enter the **TTS Name** if using TTS instead of a Spoken Name, and if the TTS name is different than the Display Name. If TTS does not properly speak the Display Name, a more phonetic version may produce a more pleasing result. If the Display Name is an abbreviation or acronym, a fully expanded TTS Name should be used. For example, LA should be replaced by either EL AYE or Los Angeles as preferred.
- 9 Click the browse icon and browse to the recorded name for the location. Upload the recording.
- 10 Click **OK**.
- 11 Click in the **Time Zone** field. Click the arrow to the right and select your time zone from the drop-down.
- 12 Repeat for each location.

Configuring Call Routing

The **Call Routing** tab contains settings for where incoming calls will be routed.

The screenshot shows the 'Call Routing' tab in a system configuration window. The interface includes a top navigation bar with tabs for SMS / SMTP, VIM, Speech, Group Management, Availability Sources, Availability Announcements, and Directory Propagation. The 'Call Routing' tab is active, showing a table of call routing rules. Numbered callouts point to specific features: 1 points to the 'Call Routing' tab; 2 points to the 'Control Manual Overrides...' button; 3 points to the 'Test...' button; 4 points to the 'Add' and 'Delete' buttons; 5 points to the 'Service Type' column; 6 points to the 'Service Number' column; 7 points to the 'Location' column; 8 points to the 'Subscriber Calls' column; 9 points to the 'Non-Subscriber Calls' column; and 10 points to the 'Allow Subscriber Logon' checkbox.

Service Type	Service Number	Location	Subscriber Calls	Non-Subscriber Calls	Primary Device	Other	Comment
Phantom	1000	All Locations	(SC) 0500 MAIN SCHEDULE	(SC) 0500 MAIN SCHEDULE	<input type="checkbox"/>	<input type="checkbox"/>	
Phantom	1001	All Locations	(CP) 0000 DAY MAIN MENU	(CP) 0000 DAY MAIN MENU	<input type="checkbox"/>	<input type="checkbox"/>	
Phantom	1002		(CP) 0300 Options	(CP) 0300 Options	<input type="checkbox"/>	<input type="checkbox"/>	
Phantom	3001		(CP) 0100 NIGHT MAIN MENU	(CP) 0100 NIGHT MAIN MENU	<input type="checkbox"/>	<input type="checkbox"/>	
Default Answer		Seattle	(SC) 0500 MAIN SCHEDULE	(SC) 0500 MAIN SCHEDULE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard DB generated this r

Figure 4. Call Routing

- (1) **Call Routing Tab.** The tab where call routing options are configured.
- (2) **Control Manual Overrides.** Brings up a dialog that allows for manually overriding the system call routing settings. Refer to the [Turning On/Off Manual Overrides](#) section for more details.
- (3) **Test Button.** The test button brings up a dialog for you to check to see which call handling mailbox will answer a call based on a particular date and time. Refer to the [Configuring Schedule Override Rules](#) section for more details.
- (4) **Editing Controls.** Add a new route or Delete an existing route.
- (5) **Service Type.** The Service Type is the source of the incoming call. The following Service Types are available:
 - **Default Answer:** Default answer is the default incoming call service for the system server. Any calls not processed by Phantom, DNIS, or Trunk entries in this table will be processed by Default Answer. At minimum, either a Default Answer entry with a location set to All Locations or a Default Answer entry for each individual location or both must exist. When both exist, specific location entries have a higher priority than All Location entries.
 - **Phantom:** A phantom number is set up without an associated physical extension.
 - **DNIS:** DNIS service reports the number dialed by an incoming caller.

- **Trunk:** The trunk from which a particular call originated.
- (6) **Service Number.** The number associated with the Service Type for purposes of identifying and routing incoming calls.
- (7) **Location.** The location where the call routing rule will be in effect as determined by the identification of the calling number.
- NOTE** The location of the Call Routing entry can be set differently than the location of the underlying switch section. This allows an Auto Attendant to be virtually located anywhere in the world regardless where the call servers reside.
- (8) **Call Handling Mailboxes.** The mailboxes that will handle the calls from Subscribers or Non-Subscribers.
- (9) **Allow Subscriber Logon.** Select this check box to first offer the option for subscribers to log in to their accounts instead of being immediately routed to the call handling mailbox.
- (10) **Comment.** Comments related to the Call Routing rule. If the entry was automatically created during a system upgrade, the data used to create the entry will be noted.

To configure Call Routing:

- 1 Open *MiCollab AM Admin* by either double-clicking the desktop icon or browsing to **Start > All Programs > MiCollab AM Desktop > MiCollab AM Admin**.
- 2 Enter the **Username** and **Password**.
- 3 Click the **Configuration** menu and select **System...** The System Configuration screen appears.
- 4 Click the **Call Routing** tab.
- 5 Click **Add**.
- 6 Click the **Service Type** field and select the service type from the drop-down.

NOTE You must configure, at minimum, one Default Answer service type for each location or for all locations.

- 7 Enter the **Service Number** for all Service Types other than Default Answer. The service number is the number associated with the service type.
- 8 Click the **Location** field and select the location where the call routing will be active. Choose All Locations to support all your locations with one entry. If both an entry with All Locations and an entry with a specific location exist, the specific entry will be selected for that location.

NOTE You can add more locations in the **Locations** tab.

- 9 In the **Call Handling Mailbox** fields, select the desired mailbox that will handle **Subscriber Calls** and **Non-Subscriber Calls** by clicking in the field and clicking the button to the right of the field. The Mailbox Selection dialog box appears.
- 10 Click the Schedule mailbox that will be active for the selected type of call (subscriber or non-subscriber) and click **OK**.

NOTE You may also use a Call Processor Mailbox. If you use a Call Processor Mailbox instead of a Schedule mailbox, then you cannot use the schedule to route your calls. In order to maximize the flexibility of MiCollab AM, consider using the Schedule mailbox.

- 11 Check the boxes to **Allow Subscriber Logon**. Checking the **Primary Extension** box will prompt callers dialing in from their primary extensions for subscriber credentials. Checking the **Other** box will prompt users dialing in from any other extension (home, mobile, etc.) for subscriber credentials. Leave one or both of these unchecked, as desired, to have users enter the system as a non-subscriber.

Configuring Schedule Override Rules

The **Schedule Override Rules** tab is where you define system-wide schedule override rules. On this screen you can define both **Schedule Overrides**, overrides that will occur on predetermined dates and times, or **Manual Overrides**, overrides which must be engaged manually and override any weekly schedule. Manual overrides could be things like a snow day, or other likely event that is unpredictable.

The screenshot shows the 'Schedule Override Rules' configuration window. It features a tabbed interface with the following tabs: SMS / SMTP, VIM, Speech, Group Management, Availability Sources, Availability Announcements, and Directory Propagation. The 'Schedule Override Rules' tab is active, showing two sub-tabs: 'Schedule Overrides' and 'Manual Overrides'. The 'Schedule Overrides' sub-tab contains a table with one entry: 'New Years Day' with rule 'January 1 (F)' and type 'System'. The 'Manual Overrides' sub-tab contains a table with one entry: 'Unexpected Closure' with rule 'Manual' and type 'System'. Both tables have 'Add', 'Edit', 'Delete', and 'Copy' buttons above them. At the bottom of each table is a 'List Usage' button. The window also has 'OK', 'Cancel', 'Apply', and 'Help' buttons at the bottom right.

Figure 5. System Configuration - Schedule Override Rules

- (1) **Schedule Override Rules Tab.** The tab where system-wide Schedule and Manual Override rules are defined.
- (2) **Editing Controls (Schedule Overrides).** Click **Add**, **Edit**, **Delete** or **Copy** to add, edit, delete, or copy a Schedule Override.

NOTE If any schedule override is in use by any schedule mailboxes, it cannot be deleted.

- (3) **Editing Controls (Manual Overrides).** Click Add, Edit, or Delete to add, edit, or delete a Manual Override.
- (4) **Schedule Overrides.** A list of system-wide defined Schedule Overrides.
- (5) **Manual Overrides.** A list of defined system-wide Manual Overrides.
- (6) **List Usage (Schedule Overrides).** Lists the Schedule Mailboxes that use the selected Schedule Override.
- (7) **List Usage (Manual Overrides).** Lists the Schedule Mailboxes that use the selected Manual Override.

To configure System Schedule Overrides rules:

- 1 Open *MiCollab AM Admin* by either double-clicking the desktop icon or browsing to **Start > All Programs > MiCollab AM Desktop > MiCollab AM Admin**.
- 2 Enter the **Username** and **Password**.
- 3 Click the **Configuration** menu and select **System...** The System Configuration screen appears.
- 4 Click the **Schedule Override Rules** tab.
- 5 Click the **Add** button in the **Schedule Overrides** pane.
- 6 Give the override a name in the **Name** field.
- 7 Define whether the override will occur on a particular Weekday of each Month, Day of each Month, Weekday of each Year, Day of each Year, or on a Specific Date or Date Range.

NOTE Options where an override or holiday may fall on a weekend day have a **Floating (F)** checkbox. If selected, this will force the override to either the previous Friday or the following Monday or other selected day of the week.

NOTE If selecting a specific day of the year, specific date, or date range, you can opt to use an alternate Weekly Schedule.

- 8 Click **OK** to create the Schedule Override.

To configure System Manual Overrides rules:

- 1 Open *MiCollab AM Admin* by either double-clicking the desktop icon or browsing to **Start > All Programs > MiCollab AM Desktop > MiCollab AM Admin**.
- 2 Enter the **Username** and **Password**.
- 3 Click the **Configuration** menu and select **System...** The System Configuration screen appears.
- 4 Click the **Schedule Override Rules** tab.
- 5 Click the **Add** button in the **Manual Overrides** pane.

- 6 Enter the name of the override in the **Display Name** field. The Speech Properties name will automatically mirror the Display Name.
- 7 Click the **Advanced Options** tab of the **Edit** screen. Enter the TTS Name in the **TTS Name** field if using TTS instead of a Spoken Name only if the Display Name is not spoken correctly. If using a recording instead of TTS, browse to a recording of the spoken name of the override by clicking the icon to the right of the **Spoken Name** field.
- 8 Click **OK** to save the Manual Override.

Turning On/Off Manual Overrides

There are several ways to control manual overrides. The first is through the System Configuration controls, the second through the Telephone User Interface (TUI), and the third is through the MiCollab AM Mobile Admin.

Through System Configuration

Manual Override Control

1 Target

☐ Specific Schedule Mailbox

☐ Specific Manual Override Location Seattle

☒ All Schedule Mailboxes and Locations

2 Operation

☒ Clear

☐ Set Unexpected Closure

3 Active Manual Override(s)

MBID	Schedule Name	Rule Name	Manual Override Location
------	---------------	-----------	--------------------------

Apply

Exit

Help

Figure 6. Manual Override Control

- (1) **Target.** These radio buttons define the scope of the manual override. The following selections are available:
- **Specific Schedule Mailbox:** The manual override is applied only to the selected mailbox
 - **Specific Manual Override Location:** The manual override is applied only to the selected location. The list of locations is retrieved from the locations defined in the **Locations** tab.

NOTE Applying an override to a location has no effect unless the location is selected in the **Manual Override Location** field under the **Main** tab of the Schedule Mailbox.

- **All Schedule Mailboxes and Locations:** The manual override is applied to all schedule mailboxes and locations that belong to the current system.
- (2) **Operation.** Defines what specific action you would like to manually apply. The two available options are to clear manual overrides or set a specified manual override for the target.
- (3) **Active Manual Overrides.** Currently active manual overrides are shown in this pane.

To configure manual overrides via System Configuration:

- 1 Log in to **MiCollab AM Admin** and go to **Configuration > System....**
- 2 From the **Call Routing** tab, click the **Control Manual Overrides...** button.
- 3 Select the **Target** of the manual override:
 - A Specific Schedule Mailbox
 - A Specific Manual Override Location
 - or All Schedule Mailboxes and Locations.
- 4 Define whether you wish to **Clear** a manual override or overrides or **Set** a manual override.
- 5 If you wish to **Set** a manual override, select the desired override from the drop-down list next to the radio button.
- 6 Click **Apply**. If a manual override was set, it will appear in the **Active Manual Override(s)** display.

Through TUI

To configure manual overrides via the TUI:

NOTE The mailbox used to enable or disable manual overrides must have **Control Manual Overrides** checked in the **Recordings** tab of the Subscriber Mailbox that will be used to call in.

- 1 Dial in and log in to a Subscriber Mailbox that has been given permission to control manual overrides.
- 2 Press **4** to access System Maintenance functions.
- 3 Press **6** to change Schedule Mailbox overrides.
- 4 To set an override, press **1**; to clear an override, press **2**.
- 5 Select the **Target** of the manual override:
 - Press **1** for a specific Schedule Mailbox
 - Press **2** for a specific location
 - or Press **3** for all Schedule Mailboxes and locations.

- 6 Follow subsequent TUI instructions to set or clear manual overrides. The specific order and content will vary, depending on system configuration.

Through MiCollab AM Mobile Admin

To configure manual overrides via MiCollab AM Mobile Admin:

- 1 Log in to **MiCollab AM Mobile Admin**.
- 2 Click **Call Routing**.
- 3 Click **Control Manual Overrides**.
- 4 Select the **Target** of the manual override:
 - A Specific Location
 - or All Schedule Mailboxes and Locations.

NOTE The Specific Schedule Mailbox option is not an available selection via MiCollab AM Mobile Admin.

- 5 Define whether you wish to **Clear** a manual override or overrides or **Set** a manual override.
- 6 If you wish to **Set** a manual override, select the desired override from the drop-down next to the radio button.
- 7 Click **OK**.

Testing Call Routing

Click the **Test** button in the **Weekly Schedule**, **Schedule Overrides**, or **Manual Overrides** tabs to check to see what call handling mailbox would be used at various time on various days.

Call Routing Test

1 Date: Friday, December 18, 2015

2 Time: 12:06 PM

3 Line Location: London

4 Service Type: Default Answer

5 Service Number:

7 Test

8 Use Current Time

OK

Cancel

Help

6 Test Results:

	Subscriber Calls	Non-Subscriber Calls
Schedule mailbox:		
Rule name:		
Call Processor mailbox:		
Routed Location:		

Notes: Test results are based on saved data (rules, schedules, locations, and routes) only.
There is only one active (current or future) instance of each recurring rule. If the Date above occurs after this instance, it is excluded from the test results.

Figure 7. Call Routing Test

- (1) **Date.** Enter the date to simulate the Call Routing.
- (2) **Time.** Enter the time to simulate the Call Routing.
- (3) **Line Location.** Enter the location to be tested.
- (4) **Service Type.** Options are *Default Answer*, *DNIS*, *Phantom*, or *Trunk*.
- (5) **Service Number.** The service number associated with the service type.
- (6) **Test Results.** This pane displays the results of the test for both subscribers and non-subscribers.
 - **Schedule mailbox.** Displays the name of the Schedule Mailbox that would be used to route the call.
 - **Rule name.** Displays the name of the Schedule Rule (Weekly Schedule, name of Schedule Override, name of Manual Override, etc.) that would route the call to the proper Call Processor Mailbox.
 - **Call Processor mailbox.** Displays the Call Processor Mailbox that would process the call on date/time specified.
 - **Routed Location.** Displays which location the call initially came in and routed from.
- (7) **Test button.** Once the location, time, and date are set, click this button to run the test.
- (8) **Use Current Time.** Set the testing date and time to the current date and time.

Configuring a Schedule Mailbox

Once you are finished with the setting up the System Configuration from **MiCollab AM Admin**, you are ready to configure the schedules using Schedule Mailboxes. Use the procedures described in this chapter to properly configure the schedule.

In order for a Schedule Mailbox to properly function, the following options should be configured properly:

Set up Schedule Mailbox information

On the **Main** tab, assign a mailbox number, name, security code (if necessary), language the Schedule Mailbox will set up for, and the location that will be used for manual overrides.

IMPORTANT Be careful when assigning a number to the Schedule Mailbox as the mailbox number cannot be changed once it is saved.

Configure Weekly Schedule

Weekly Schedule generally refers to the normal schedule that repeats every week. On the **Weekly Schedule** tab, define which Call Processor Mailboxes will process the calls at certain time blocks during the week.

For example:

During 8am-5pm on Monday through Friday, the calls are routed to the *Day Main Menu* Call Processor Mailbox.

All other hours, the calls are routed to the *Night Main Menu* Call Processor Mailbox.

Configure Schedule Override Schedules

Define any schedules for the Schedule Overrides on the **Schedule Override** tab. The Schedule Overrides are usually holidays or any pre-defined events that require different scheduling from the Weekly Schedule. When a Schedule Override is active, it takes precedence over the Weekly Schedule.

For example:

During the Thanksgiving holidays, the calls are routed to the *Holiday Menu* Call Processor Mailbox instead of the *Day Main Menu* or *Night Main Menu* Call Processor Mailboxes defined in the Weekly Schedule.

The schedule will go back to the Weekly Schedule when the rule for a Schedule Override expires, where the rule for each Schedule Override can be different depending on your configuration.

Configure Manual Override Schedules

Define any Manual Override schedules on the **Manual Override** tab. The Manual Overrides generally refer to any unexpected events or shut-offs (e.g. weather condition, emergency operation closure, etc.) that require a temporary scheduling different from the Weekly Schedule or Schedule Override Schedule.

Manual Override is turned on/off manually by the administrator via the System Configuration, TUI, or MiCollab AM Mobile Admin and is applied to the system immediately it is turned on.

For example:

If your office is located in the area where there is a lot of snow during the winter season, the operation may have to be shut down due to the condition.

Then, you can create a Manual Override named *Snow Closure* and assign *Emergency Closure Call Processor Mailbox* from 6am to 12am (midnight).

On the day that requires the office closure, the administrator turns on the *Snow Closure* manual override, and the calls will then go through the *Emergency Closure Call Processor Mailbox* instead of the *Day Main Menu* from the Weekly Schedule assigned originally for that day.

NOTE We recommend that the administrator configure the schedule for a Manual Override beforehand, so when such incident occurs, the emergency scheduling can take effect immediately the manual override is turned on.

Setting up a New Schedule Mailbox

IMPORTANT If you are creating/adding a new Schedule Mailbox, you must assign the **Mailbox Number** and **Display Name** of the mailbox in the **Main** tab and define the entire week's schedule in the **Weekly Schedule** tab in order to be able to save the mailbox.

Follow the steps listed in this section to add a new Schedule Mailbox and configure the required set up options.

To add a Schedule Mailbox:

- 1 Open **MiCollab AM Admin** and enter the **Username** and **Password**.
- 2 Under the **Mailbox** menu, click **Add...**
- 3 Select the server that will host the scheduled mailbox from the **Server** drop-down.
- 4 Set the **Mailbox Type** to *Schedule*.
- 5 Click **OK**. The **Schedule Mailbox** window appears.
- 6 Configure the **Main** and **Schedule Override** tabs as described in the following steps.

To configure the options in the Main tab:

- 1 On the **Main** tab, give the mailbox a unique number in the **Mailbox Number** field. This is a required field that must be filled in to save the mailbox.
- 2 Once an acceptable number is entered, the **Display Name** field becomes available. Enter the desired display name in this field. This is a required field that must be filled in to save the mailbox.
- 3 Click the **Set** button.

NOTE Set up a security code if you want other administrators/subscribers to be able to manage manual override for this Schedule Mailbox via TUI.

- 4 Enter a security code in the **New Security Code** field and confirm the security code.
- 5 Select the desired language pack to be used with the mailbox from the **Language Pack** drop down. To leave the language as system default, select **Default**. Any other setting will override the system language setting for this Schedule Mailbox.
- 6 Select the **Manual Override Location**. This will affect whether or not this Schedule Mailbox will be affected by future location-specific manual overrides.

For example:

Let's say your company has three offices in Seattle, New York, and Minneapolis. If there is snow in New York, you can turn on the *Snow Closure* Manual Override for the Schedule Mailboxes that are assigned to New York in this option.

The offices located in Seattle or Minneapolis will not be affected.

NOTE If the **Manual Override Location** option is set to **n/a**, the Schedule Mailbox will not be associated with a specific location and the manual override will be applied to this mailbox only when a manual override turned on for ALL mailboxes in the system.

NOTE **Security Code**, **Language Pack**, and **Manual Override Location** are used only for setting or clearing manual overrides via TUI, MiCollab AM Admin, or MiCollab AM Mobile Admin. If a security code is not specified, logging on to the Schedule Mailbox from the TUI for other administrators/subscribers will not be available.

- 7 Continue to the steps in the next [Configuring Weekly Schedule](#) section.

Configuring Weekly Schedule

In order for a Schedule Mailbox to properly route and process calls at any time of the day, the entire time blocks (from 12am to 12am daily for the whole week) must be configured with call handling mailboxes and optionally with ESP in the **Weekly Schedule** tab.

IMPORTANT This rule applies to all Schedule Mailboxes whether you are creating, adding, or editing a Schedule Mailbox. If any time blocks are left blank, the mailbox cannot be saved.

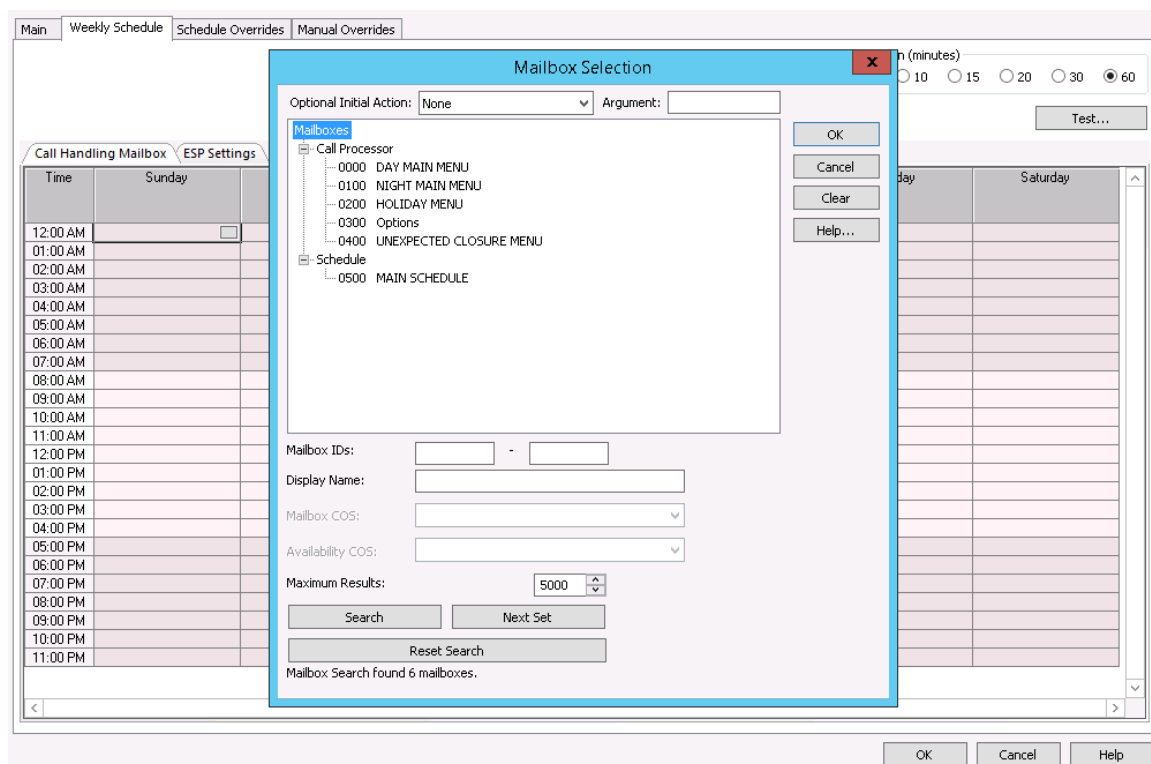
Assigning Call Handling Mailboxes to Weekly Schedule

When you click the **Weekly Schedule** tab, the **Call Handling Mailbox** tab is the default tab displayed. The **Call Handling Mailbox** tab is where you assign the mailboxes (Call Process Mailboxes or other Schedule Mailboxes) in the time blocks to handle incoming calls at particular times on particular day.

To configure scheduling for the Weekly Schedule:

This example describes how to configure the Weekly Schedule that processes calls during the business hours from 8am to 5pm, and non-business hours for all other times during the week.

- 1 Click the **Weekly Schedule** tab.
- 2 (Optional) In **Resolutions (minutes)**, change the time increments for the time blocks. The default is 60 minutes.
- 3 Click the first time block that you wish to assign a call handling mailbox. (The **12:00AM** time block is clicked in this example).
- 4 When the cell shows a button, click the button. The **Mailbox Selection** dialog box appears. (You can also double-click the cell to display the **Mailbox Selection** dialog box.)



- 5 If you want to select the type of transfer from the **Optional Initial Action** drop-down list, select the following options. Otherwise, skip to Step 7.
 - **None** – Take no action
 - **Blind Transfer** – Transfers the call and then releases the call
 - **Monitored Transfer** – Transfers the call and then releases the call after the call is connected; will pull the call back if a busy tone is heard

- **Supervised Transfer** – Transfers the call, listens for the connection, and then prompts the caller to confirm the transfer
 - **Subscriber Message** – Transfers the call to the subscriber mailbox greeting.
- 6 Type in the extension or mailbox number depending on the selected **Optional Initial Action** in the **Argument** field.
- 7 If you want to search for a mailbox, use the following instructions. Otherwise, skip to Step 8.
- If you want to search for a range of mailboxes, enter a mailbox or a range of mailboxes in the in **Mailbox IDs** fields and then click the **Search** button.
 - If you want to search for a mailbox by its display name, enter a mailbox display name in the **Display Name** field and then click the **Search** button.
 - Enter the number of mailboxes to display as the result of a search in the **Maximum Results** field. The default is 5000.
 - Click the **Next Set** button to go to the next set of the search.
 - Click the **Reset Search** button to reset the search.
 - Click the **Create** button to display the new **Mailbox Selection** dialog box to create a new mailbox. This button does not appear in every circumstance; it is context related.
- 8 Double-click the call handling mailbox you wish to assign, or select the mailbox and click **OK**. You can choose a Call Processor Mailbox or another Schedule Mailbox.

The selected time block is displayed in yellow with the name of the selected call handling mailbox (*Night Main Menu* Call Processor Mailbox in the example below).

Schedule Mailbox - Demonstration System - 5001 Test

Main Weekly Schedule Schedule Overrides Manual Overrides

Resolution (minutes)
☐ 5 ☐ 10 ☐ 15 ☐ 20 ☐ 30 ☒ 60

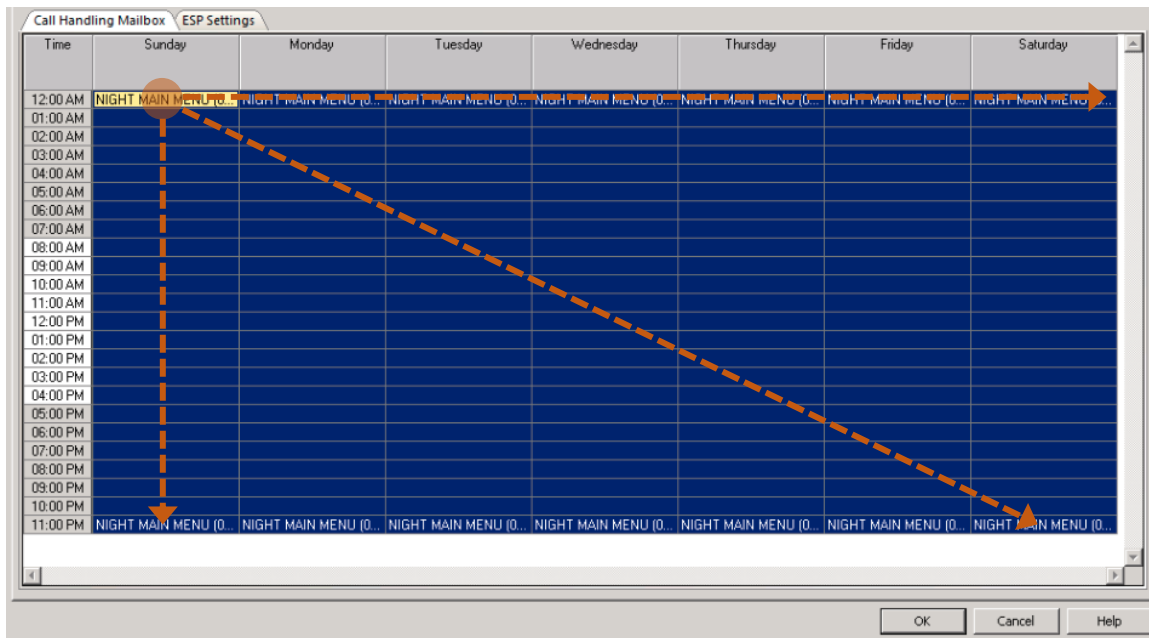
Test...

Call Handling Mailbox ESP Settings

Time	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12:00 AM	NIGHT MAIN MENU (0...						
01:00 AM							
02:00 AM							
03:00 AM							
04:00 AM							
05:00 AM							
06:00 AM							
07:00 AM							
08:00 AM							
09:00 AM							
10:00 AM							
11:00 AM							
12:00 PM							
01:00 PM							
02:00 PM							
03:00 PM							
04:00 PM							
05:00 PM							
06:00 PM							
07:00 PM							
08:00 PM							
09:00 PM							
10:00 PM							
11:00 PM							

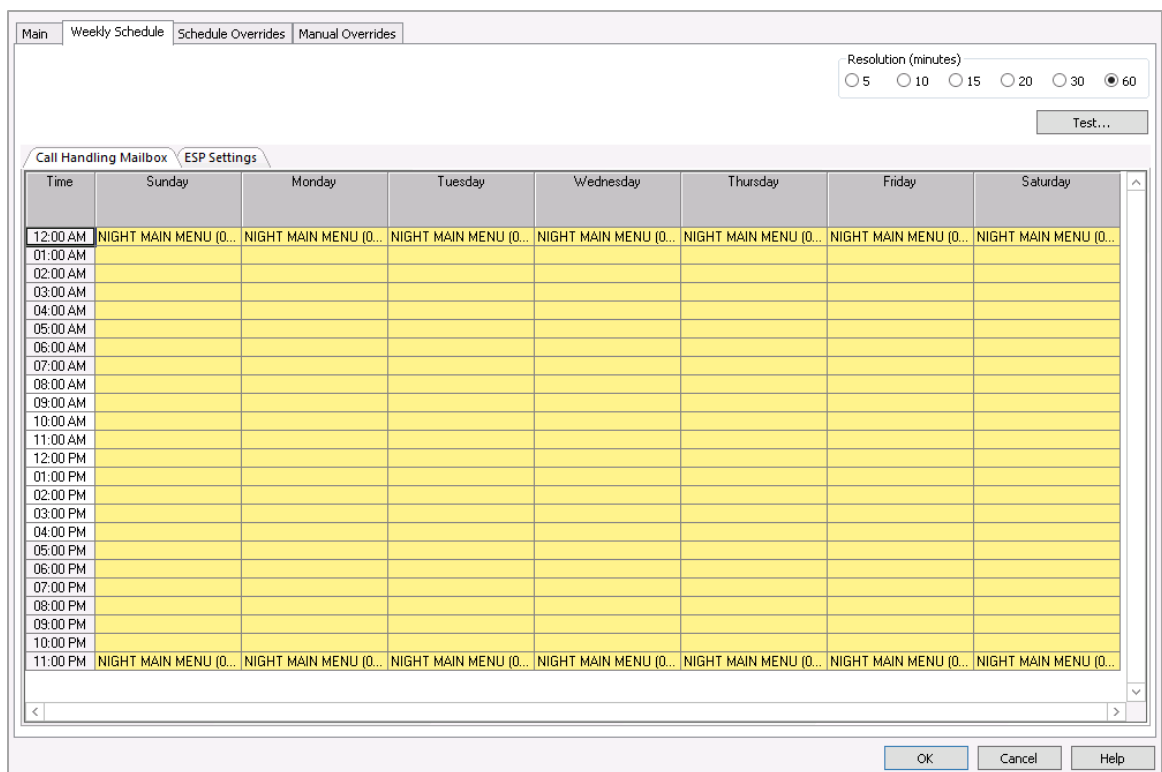
OK Cancel Help

- 9 Click the time block again, hold and drag vertically, horizontally, or even diagonally to highlight the range of time blocks. The example is showing the diagonal drag to select the week.



- 10 On the release of the mouse, you will see all the highlighted time blocks are filled in with the same color and the same mailbox from the first time block you clicked.

The example below is showing that the entire week is filled with the *Night Main Menu* Call Processor Mailbox for non-business hours.



- 11 Repeat the same steps for setting up the schedule for business hours from 8am to 5pm Monday through Friday. The example is shown with the *Day Main Menu* Call Processor Mailbox.



TIP You can also click the first time block and drag it to highlight the range of time blocks. On the release of the mouse, the **Mailbox Selection** dialog box will appear. Select a mailbox and the highlighted time blocks are filled in with the selected mailbox.

- 12 If you want to configure the ESP options for the Weekly Schedule, continue to the next [Configuring the ESP Options](#) section. Otherwise, click **OK** to save and exit.

Configuring the ESP Options

Through the **ESP Setting** tab from the **Weekly Schedule** tab, you can set ESP (Extension Specific Processing) to include extended call menus for any particular time period. For more details about ESP, see the document, *System Administration Guide*.

The Schedule Mailbox supports setting ESP for the subscriber calls only, for the non-subscriber (outside) calls only, for all, or off for all based on date and time. The following two icons indicate what ESP processing is in effect:

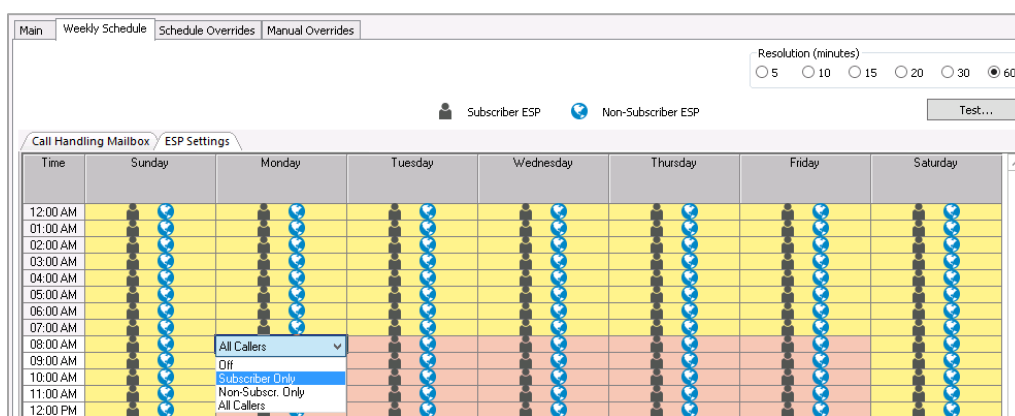
-  Subscriber ESP
-  Non-subscriber ESP

If both icons are present, ESP is on for all callers. If no icon is present, ESP is off for all callers. The method to assigning the ESP options to time block is same as assigning the call handling mailboxes except that the menu options are presented as a drop-down list rather than a dialog box.

NOTE By default, both subscriber and non-subscriber ESPs are set at all times. This step is optional only if you want to change the ESP settings for any particular time or day.

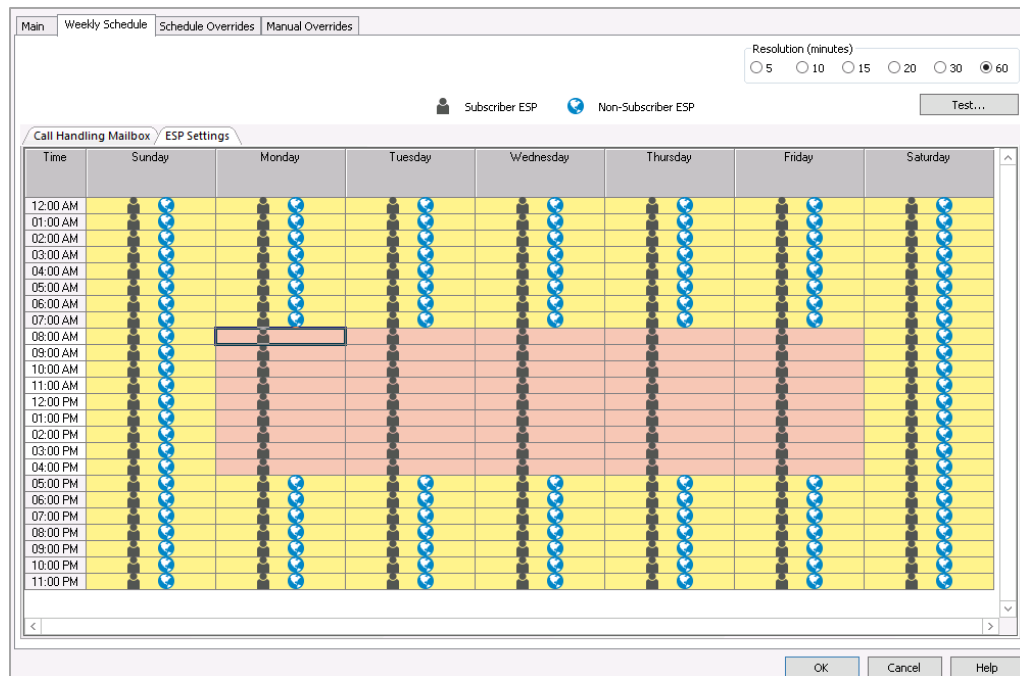
To set/change ESP settings for a time period:

- 1 On the **Weekly Schedule** tab, click the **ESP Settings** tab.
- 2 Click in the time block you want set or change the ESP setting.
- 3 When the button appears, click the arrow open the drop-down list with the available options.



- 4 Select the desired option. Once selected, click on that cell and drag to the end of the range that you wish to have the same setting.

The example below shows that only the Subscriber ESP is enabled during the business hours from 8am to 5pm Monday through Friday.



- 5 Click **OK** to save. The new Schedule Mailbox is now ready to process calls based on the Weekly Schedule configuration.

Configuring Schedule Overrides

A Schedule Override rule is a rule that becomes effective on a specified date or time. These can include the following:

- A specified weekday of each month, such as the first Thursday of each month
- A specified day of the month, such as the 22nd of every month
- A specified weekday every year, such as the first Friday in August every year
- A specified day of each year, such as every August 22nd
- Or a specified day or range of days every year (to a maximum of 14 days).

If a Schedule Override is defined for a particular day of each month or day of each year, the override can be defined as floating. In those cases, if the defined date occurs on a particular weekday, the override can be made effective on a previous or subsequent weekday.

This can be useful if, for example, a holiday occurs on a Saturday or Sunday and an office will be closed on either the previous Friday or following Monday in observance of that holiday.

An *Alternative Weekly Schedule* can be defined and activated for a specific day of the year or range of specified dates, the seven-day alternative weekly schedule replaces the normal schedule defined in the **Weekly Schedule** tab on the day or date range specified.

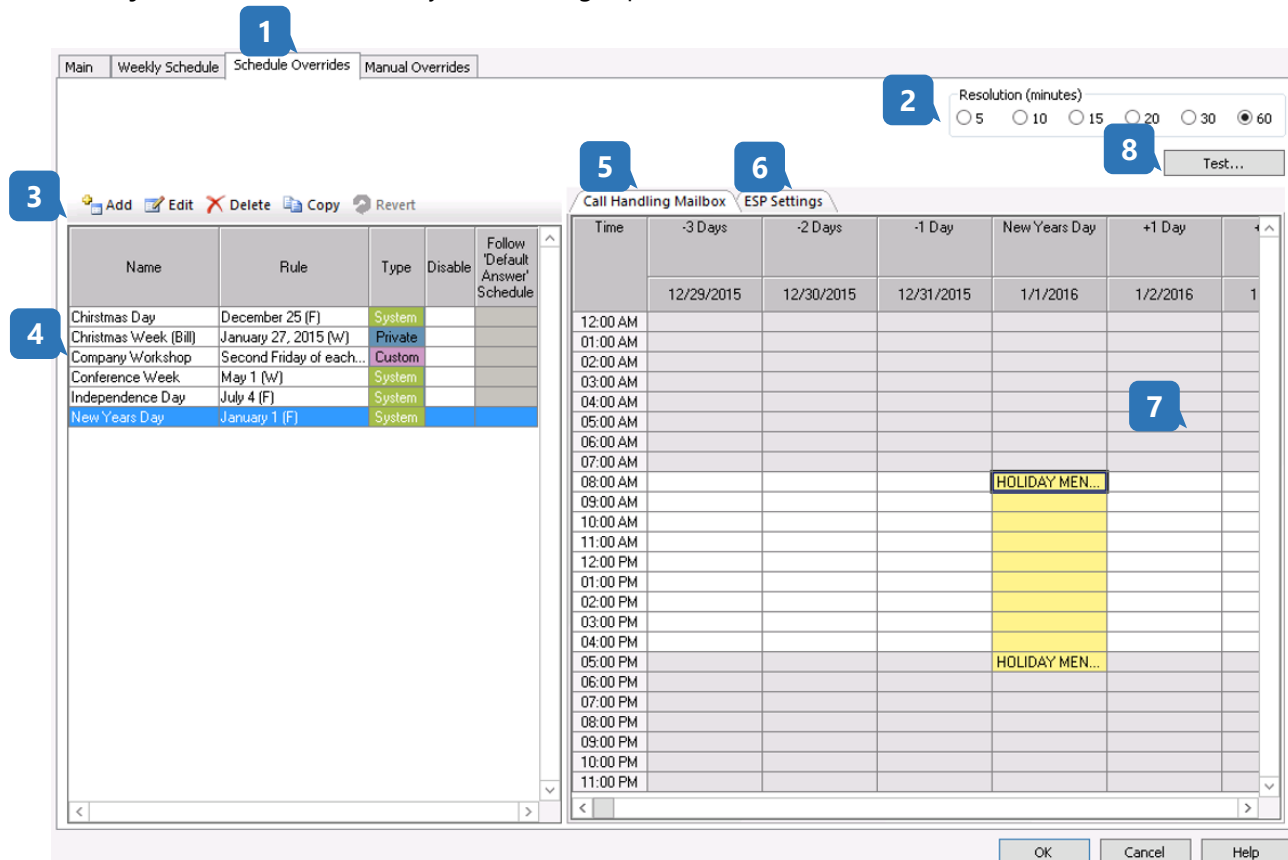


Figure 8. Schedule Overrides

Exploring the Schedule Overrides Tab

- (1) **Schedule Overrides Tab.** This tab is where you will find schedule overrides for both Call Handling Mailboxes and ESP settings.
- (2) **Resolution (minutes).** Selecting the radio buttons in this section of the screen adjusts the amount of time covered by each calendar field.
- (3) **Editing Controls.** *Add* a new rule; *Edit* an existing rule, *Delete* an existing rule, *Copy* an existing rule to a new rule, or *Revert* changes to a system rule.
- (4) **Schedule Overrides.** The **Name** column contains the name of the rule. The **Rule** column contains a description of when the rule will become effective. The **Type** column indicates one of the following rule types:
 - *System* rules (green) are system defined and available across all Schedule Mailboxes.

NOTE System rules can only be added, edited or deleted in the System Configuration by the administrator. If edited in a Scheduled Mailbox it becomes a Custom rule only applicable to that schedule mailbox.

- *Custom rules* (pink) are System rules that have been changed; the changes are only available in the selected Schedule Mailbox. Note that the **Revert** is only available for Custom rules. Clicking it will revert the Custom rule back to the original System rule.
- *Private rules* (blue) are created within and available only to the selected Schedule Mailbox.

When there is an **X** in the **Disabled** tab, the rule is disabled. If **Follow 'Default Answer' Schedule** contains **Yes**, the system will ignore the Schedule Override and calls will go to the Weekly Schedule of the Schedule Mailbox.

- (5) **Call Handling Mailbox Tab.** Click this tab to define what call handling mailbox, either a Call Processor or another Schedule Mailbox, will be active on specific days at specific times.
- (6) **ESP Settings Tab.** Click this tab to define ESP settings based on day of the week and time of day.
- (7) **Calendar display.** Click inside these cells to define the Call Processor or Schedule Mailbox that will answer incoming calls.
- (8) **Test Button.** The test button brings up a dialog for you to check to check which call handling mailbox will answer a call based on a particular date and time.

Adding or Editing Schedule Override Rules

Click **Add** or **Edit** in the *Editing Controls* (B above) to open the Rule Editor dialog that allows for the addition or editing of a Schedule Override.

The screenshot shows the 'Rule Editor' dialog box with the following elements and numbered callouts:

- 1** Name: [Text input field]
- 2** Rule: [Radio button] Weekday of each Month
- 3** The [Fourth] [Friday]
- 4** [Radio button] Day of each Month
- 5** [Radio button] Weekday of each Year
- 6** [Radio button] Specific Date or Date Range (maximum range is 14 days)

Additional visible elements include:

- Day of each Month: [25]
- Floating (F): []
- If it occurs on a [Saturday] move it to the [Previous] [Friday]
- If it occurs on a [Sunday] move it to the [Following] [Monday]
- Day of each Year: [March 25]
- Floating (F): []
- If it occurs on a [Saturday] move it to the [Previous] [Friday]
- If it occurs on a [Sunday] move it to the [Following] [Monday]
- Use an alternate 'Weekly Schedule' (W): []
- Specific Date or Date Range: [Friday, March 25, 2016] [Friday, March 25, 2016]
- Use an alternate 'Weekly Schedule' (W): []
- Buttons: [OK] [Cancel]

Figure 9. Rule Editor

- (1) **Rule Name.** The name of the Schedule Override Rule.
- (2) **Weekday of Each Month.** Define a rule that will apply the Schedule Override on a particular weekday of each month. For example, the first Tuesday of each month or the last Wednesday of each month.
- (3) **Day of Each Month.** Define a rule that will occur on the same numerical date each month. Floating rules will move to a pre-determined day if the set day of the week falls on a particular day.
- For example:
If you wish to have a scheduled override on the 26th of every month, as long as that day does not fall on a weekend, you can set the override to float to the previous Friday or following Saturday.
- (4) **Weekday of Each Year.** Define a rule that will occur on the same weekday each year. For example, the first Tuesday in August.
- (5) **Day of Each Year.** Define a rule that will occur on the same day each year. Floating rules will move to a pre-determined day if the set date falls on a particular day.
- For example:
If you wish to have a scheduled override on the 26th of every month, as long as that day does not fall on a weekend, you can set the override to float to the previous Friday or following Saturday.
- Selecting **Alternate Weekly Schedule** will convert the Calendar display of the mailbox to a weekly view, rather than a date with numbered prior or subsequent days. This can be used to ensure that scheduling by weekday for the override is consistent on a year to year basis.
- (6) **Specific Date or Date Range.** Define a rule that will occur on a specific date or over a specific range of dates for a maximum of 14 days.
- Selecting **Alternate Weekly Schedule** will convert the Calendar display of the mailbox to a weekly view, rather than a date with numbered subsequent days.
- This can be used to ensure that scheduling by weekday for the override is consistent on a year to year basis. Since the days are tied to a specific year, they will need to be changed to the next year manually after they have expired.

To configure the scheduling for the Schedule Overrides:

- 1 Click the **Schedule Overrides** tab.
- 2 Click the **Add** button to add a new Schedule Override.
- 3 Give the override a name in the **Name** field.
- 4 Define whether the override will occur on a particular Weekday of each Month, Day of each Month, Weekday of each Year, Day of each Year, or on a Specific Date or Date Range.

NOTES

- Options where an override or holiday may fall on a weekend day have a **Floating (F)** checkbox. If selected, this will force the override to either the previous Friday or the following Monday or other selected day of the week.
- If selecting a day of the year, specific date or date range, you can opt to use an alternate Weekly Schedule.

- 5 Once created, define the desired mailbox schedule under the **Call Handling Mailbox** tab and any changes to ESP processing under the **ESP Settings** tab. The controls in these tabs work the same way as the controls under **Weekly Schedule**.

The following information and controls are available for each Schedule Override:

- **Type** – This display-only field shows the following information:
 - **System** – A system default Schedule Override. These are available system-wide and is available on all system Schedule Mailboxes.
 - **Custom** – A modified system default Schedule Override. The modifications will only be available in the selected Schedule Mailbox.
 - **Private** – A schedule override created only for the selected Schedule Mailbox.
- **Disable** – Clicking this field will place an X in the field and disable the Schedule Override
- **Follow 'Default Answer' Schedule** – Clicking in this field will place **Yes** in the field and force callers to be directed to the Weekly Schedule of the Schedule Mailbox. The system will ignore the Schedule Override.

Configuring Manual Overrides

Exploring the Manual Overrides Tab

A Manual Override rule is a rule that becomes effective only when manually activated. Examples of events suitable for a manual override include snow days, or other weather related closures or any other event that is likely to occur with unpredictable frequency. Manual overrides can be set or cancelled from the MiCollab AM Admin or from the TUI.

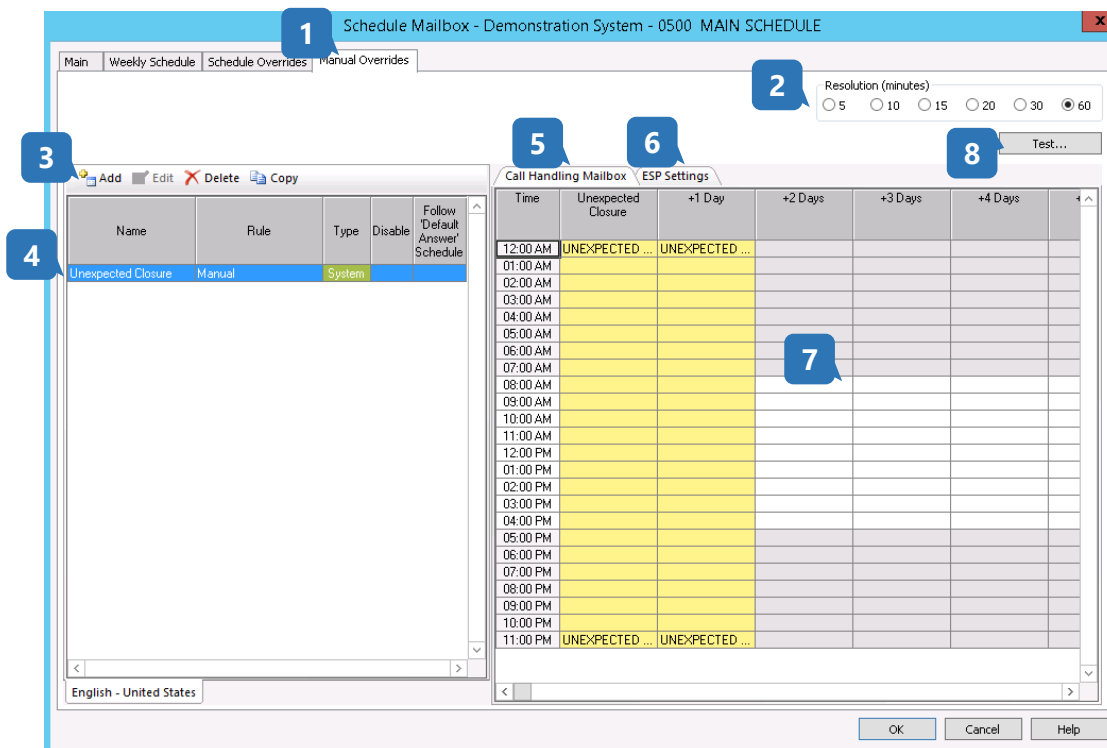


Figure 10. Manual Overrides

- (1) **Manual Overrides Tab.** This tab is where you will find manual overrides for both Call Handling Mailboxes and ESP settings.
- (2) **Timescale Resolution.** Selecting the radio buttons in this section of the screen adjusts the amount of time covered by each calendar field.
- (3) **Editing Controls.** Add a new rule, Edit an existing rule, Delete an existing rule, or Copy an existing rule to a new rule.
- (4) **Manual Overrides.** The **Name** column contains the name of the rule. The **Rule** column contains a description of when the rule will become effective. The **Type** column indicates one of the following rule types:
 - *System* rules are system defined and available across all Schedule Mailboxes.
 - *Private* rules are created within and available only to the selected Schedule Mailbox.

When there is an **X** in the **Disabled** tab, the rule is disabled. If **Follow 'Default Answer' Schedule** contains **Yes**, the system will ignore the Schedule Override and calls will go to the Weekly Schedule of the Schedule Mailbox.
- (5) **Call Handling Mailbox Tab.** Click this tab to define what call handling mailbox will be active on specific days at specific times.
- (6) **ESP Settings Tab.** Click this tab to define ESP settings based on day of the week and time of day.
- (7) **Calendar display.** Click inside these cells to trigger a button to the right of the cell that offers more settings and options.
- (8) **Test Button.** The test button brings up a dialog for you to check to see which call handling mailbox will answer a call based on a particular date and time.

Adding or Editing Manual Override Rules

Click **Add** or **Edit** in the (3) Editing Controls from Figure 10. to open the Manual Override editing dialog.

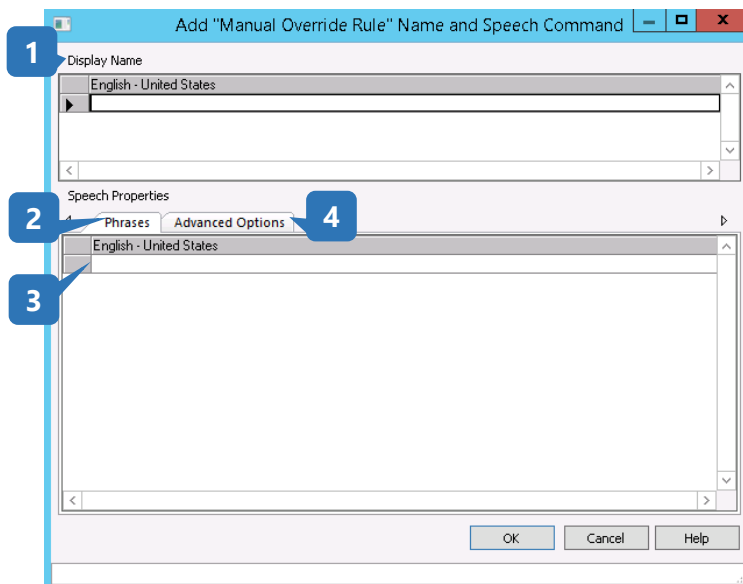
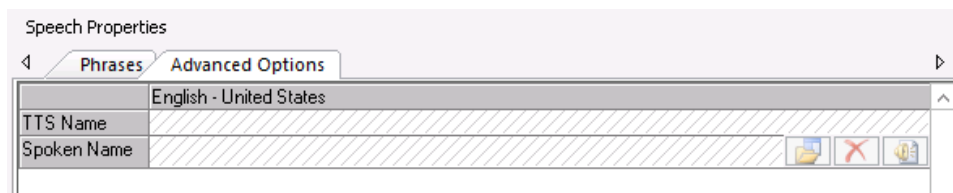


Figure 11. Editing Manual Override Rules

- (1) **Display Name.** The name that will be displayed for the Manual Override rule.
- (2) **Phrases Tab.** Displays the phrase associated with the Speech Properties for the Manual Override...
- (3) **Speech Phrases.** The speech phrase associated with the Manual Override. The phrase is automatically populated when you enter the Display Name in (1).
- (4) **Advanced Options Tab.** Displays the advanced options associated with the Speech Properties for the Manual Override.



- Available advanced options are the **TTS Name** and the **Spoken Name**.
- The Text to Speech (TTS) Name is the name that the TTS system will read in the Telephone User Interface (TUI) instead of the display name.
- The Spoken Name is a recording of the name of the manual override that is used in the TUI. A spoken name is assigned by pressing the folder icon to the right. A spoken name is often preferred over a TTS name, and is required if TTS is not installed or available.

To configure Manual Override rules:

- 1 Click the **Manual Overrides** tab and create any desired manual overrides. Manual overrides differ from Schedule Overrides in that they are not automatically triggered on a specified date and time. They can only be started manually. Possible uses might include weather related closures, or closures that can be anticipated, but whose date is not certain.
- 2 In the **Manual Overrides** tab, click **Add**.
- 3 Enter the name of the override in the **Display Name** field. The Speech Properties name will automatically mirror the Display Name.
- 4 Click the **Advanced Options** tab of the **Edit** screen. Enter the **TTS Name** in the **TTS Name** field if using TTS instead of a Spoken Name only if the Display Name is not spoken correctly. If using a recorded name instead of a TTS name, browse to a recording of the spoken name of the override by clicking the icon to the right of the **Spoken Name** field.
- 5 Configure the **Call Handling Mailbox** tab and the **ESP Settings** tab as you did for Schedule Overrides.

The following information and controls are available for each Manual Override:

- **Type** – This display-only field shows the following information:
 - **System** – A system default Manual Override. These are available system-wide and is available on all system Schedule Mailboxes.
 - **Custom** – A modified system default Manual Override. The modifications will only be available in the selected Schedule Mailbox.
 - **Private** – A schedule override created only for the selected Schedule Mailbox.
- **Disable** – Clicking this field will place an X in the field and disable the Manual Override.

- **Follow 'Default Answer' Schedule** – Clicking in this field will place **Yes** in the field and force callers to be directed to the Weekly Schedule of the Schedule Mailbox. The system will ignore the Schedule Override.
- 6 Click **OK** to save the mailbox.

Notes on Upgrading the System

Due to the dependency of Answer Mode, which requires the use of Call Routing and MiCollab AM Scheduler to perform multiple Auto Attendant Scheduling, the new Auto Attendant Scheduling solution has been introduced. The solution replaces Answer Mode with a new Schedule Mailbox, an independent mailbox that encapsulates the Answer Mode and MiCollab AM Scheduler scheduling functionalities all in one location.

In order to support this all-in-one solution, the five major components – Schedule Mailbox, Call Routing, Scheduling Rules, Location, and TUI – have either been created or modified in the MiCollab AM system.

- **Schedule Mailbox** is a new mailbox type created in MiCollab AM Admin, which replaces Answer Mode.
- **Schedule Override Rules** is a new tab created in the System Configuration to configure system-wide schedule rules.
- **Locations** is a new tab created in the System Configuration in order to assign location to mailboxes to be used for call routing and schedule overrides.
- **Call Routing** tab in the System Configuration has been modified to route calls without going through Answer Mode since Answer Mode is no longer supported.
- **TUI** has been updated to perform manual overrides via the telephone.

Considerations

- When upgrading from a pre MiCollab AM 9.0 system, the previous Answer Mode and Call Routing will be converted to 9.0 Schedule Mailbox, Call Routing, and Location.
- Information previously encapsulated by Answer Mode will be converted to the scheduling components Schedule Mailboxes, Call Routing, and Location.
- Answer Mode plans will convert to Schedule Mailboxes and Locations based on Line Groups and Schedules. The smallest definable group of lines in 9.0 is a switch section. If the 5.1 Line Groups did not properly align to a switch section, the new grouping may be different. If an 5.1 Answer Mode Plan is unassigned, it will not be converted.

NOTE Only the answer modes that are in use are converted. Those not in use *will not* appear in the database after the upgrade.

- Line Group data will generally be converted to locations. If there is more than one variation defined in Line Group, they will be converted using the labels *Location 1*, *Location 2*, *Location 3*, etc.

NOTE If the 5.1 Line Group contained all lines, only one location will result, unless there were multiple Answer Mode assignments. In that case, multiple locations will be created representing the multiple 5.1 Answer Modes.

- Depending on the Schedule type, the Schedule and Time data are converted to Weekly Schedule, Schedule Overrides, or Manual Overrides.
- ESP and ESP Other data are displayed as icons on the **ESP** tab of each of the calendar grids.
- Route Codes are no longer supported.
- Data in the Number field will be converted to Service Number.
- Service Types will be available and changed as follows:

Table 1. Service Types

MiCollab AM 5.1	MiCollab AM 9.0
N/A	Default Answer
Phantom Extension	Phantom
DNIS	DNIS
Trunk	Trunk

Upgrade Case Scenario

Background: MiCollab AM 5.1 with 24 incoming lines in a single Switch Section with lines assigned to different Call Processors using Answer Mode Line Groups.

Solution: In this case, to upgrade to MiCollab AM 9.0 and Schedule Mailboxes, you will need to create Switch Sections on the 5.1 system that mirror the Answer Mode line assignments. When creating these Switch Sections, they will need to have different hunt groups access codes assigned or the upgrade may not result in what is intended since Switch Sections with the same, or no, hunt group access code assignment are assumed to be part of the same location, since with the same hunt group access code means they are essentially part of one larger Switch Section. After the upgrade, these switch sections will use the same Schedule Mailbox.

NOTE If MiCollab AM is deployed as a hosted solution on the cloud, the server administrator performs this task.

WARNING Only follow this procedure if you require per port menu assignment because you do not have a PBX integration that provides called number information. If your PBX integration does provide called number information you should program a Call Routing rule and 24/7/365 Schedule Mailbox to send the call to the correct Call Processor.

On the 5.1 system:

- 1 Open system configuration by double-clicking on the desktop icon or browsing to **Start > Programs > MiCollab AM Desktop > Configuration**.
- 2 On the **Main** tab, click the **Shutdown** button.

NOTE This will shut down the MiCollab AM server.

- 3 Click the **Switch Sections** tab.
- 4 Click **Add**.
- 5 Select the switch in the **Local Switch** field.
- 6 Name the new switch section in the **Name** field of System Switch Section Settings.

NOTE Make sure your hunt groups match your switch sections.

- 7 Under Required Parameters of Local Switch Section Settings, enter the Hunt Group Access Code.

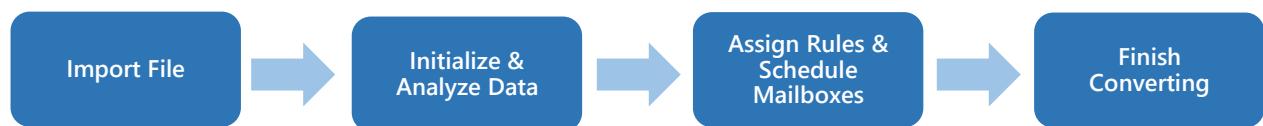
NOTE This code must be different for each Switch Section, or different Switch Sections on the same switch will be assumed to be in the same location combined into a single location using a common Schedule Mailbox during the upgrade.

- 8 Click **OK**.
- 9 Click on the **Lines** tab.
- 10 Assign the desired lines to the appropriate Switch Section by selecting the drop downs under Section. Make sure that the line assignments to the Switch Sections mirror the Line Groups in MiCollab AM Admin.
- 11 Run the upgrade script.

Importing MiCollab AM Scheduler Data

MiCollab AM Scheduler data conversion takes the scheduling and routing rules that are contained in a MiCollab AM Scheduler CSV file and brings them into the core system, allowing administrators to manage all their scheduling and routing within MiCollab AM without the need for an external application like MiCollab AM Scheduler. The system does this by generating equivalent rules in the form of Call Routing entries and Schedule mailboxes.

The MiCollab AM Scheduler data conversion is divided into 4 major phases: Import MiCollab AM Scheduler File, Initialize & Analyze Data, Assign Rules & Schedule Mailboxes, and Finish Converting.



The actual conversion occurs only when you click the **Finish** button. You can modify some of the rules directly in the conversion editor before the actual conversion.

IMPORTANT Once the conversion is finished, the database, MiCollab AM Scheduler data, and new rules and mailboxes cannot be reverted. If you haven't secured a complete backup of your database, please do so prior to performing the actual conversion.

Importing MiCollab AM Scheduler CSV File

In order to convert the MiCollab AM Scheduler data, you must import the MiCollab AM Scheduler CSV file. The **Import MiCollab AM Scheduler data...** menu is located under **Mailbox** in **MiCollab AM Admin**.

IMPORTANT If you are using multiple MiCollab AM Scheduler files, combine them into one CSV file before importing.

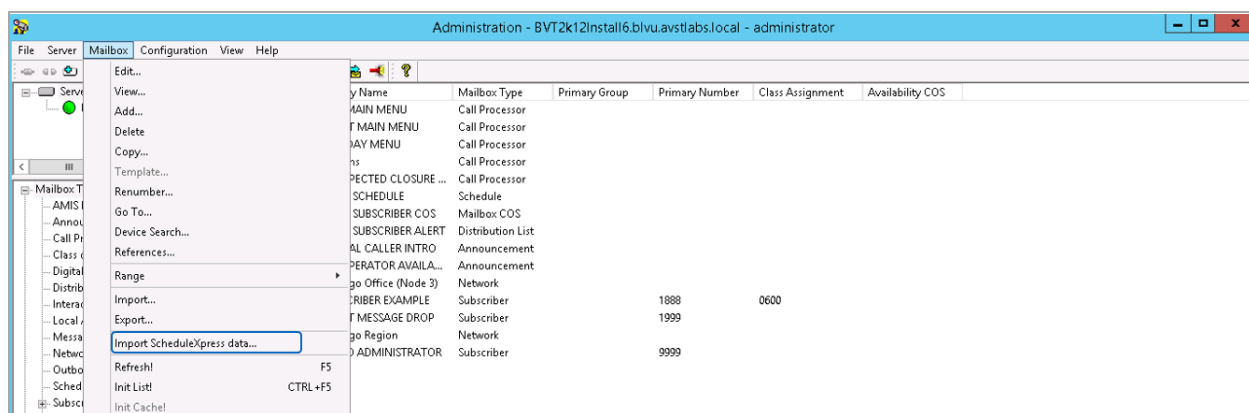


Figure 12. Import ScheduleXpress Data Menu

After the CSV file has been selected and imported, a popup dialog will indicate the country being used for date interpretation, as well as a list of items that require attention and cleanup in order to perform a clean conversion. You should carefully examine the suggestions. This may require the CSV file to be edited or the database to be edited. Re-import the CSV file after edits are complete.

Exploring the Conversion Editor

Before performing the MiCollab AM Scheduler data conversion, read carefully about each element in the conversion editor so you understand how the data was analyzed and how the actual conversion process works.

1
ScheduleXpress File Import [C:\Backups\SX.CSV]
3

Table 1: SX Date to Rule Assignments

SX Date	New Proposed Rule Name	Type	Existing Rule Name	Rule Summary	Exclude
01/01/2014	Martin Luther King Day	System	New Years Day	January 1 (F)	<input type="checkbox"/>
01/20/2014	President's Day	System		Third Monday in January	<input type="checkbox"/>
02/17/2014	Easter	System		Third Monday in February	<input type="checkbox"/>
04/20/2014	Memorial Day	System		March 27, 2016	<input type="checkbox"/>
05/26/2014	Independence Day	System		Last Monday in May	<input type="checkbox"/>
07/04/2014	Labor Day	System		July 4 (F)	<input type="checkbox"/>
09/01/2014	USA Thanksgiving	System		First Monday in September	<input type="checkbox"/>
11/10/2014	USA Thanksgiving	System		11/10/2014 or Second Monday in November	<input type="checkbox"/>
11/27/2014	Christmas Eve	System		Fourth Thursday in November	<input type="checkbox"/>
11/28/2014	Christmas Eve	System		Fourth Thursday in November	<input type="checkbox"/>
12/24/2014	Christmas Day	System		December 24 (W)	<input type="checkbox"/>
12/25/2014	Christmas Day	System		December 25 (W)	<input type="checkbox"/>
12/31/2014	New Year's Eve	System		December 31 (W)	<input type="checkbox"/>
12/31/2025	New Year's Eve	System		December 31 (W)	<input type="checkbox"/>

Conversion Criteria:

ScheduleXpress DATES are automatically converted into Rules (Table 1) using the following criteria:

- Converting into System Rules and Custom System rules:
 - If the DATE matches a known holiday, it will convert to a 'Day of Each Year' System Rule.
 - If the DATE matches an existing System Rule, it will use this Rule.
 - If a group of DATES fall in the range 12/18 - 12/31, it will convert to a Custom 'Date Range' System Rule, customized from the earliest date to the latest date in this range. If the schedules for all DATES are identical, an alternate 'Weekly Schedule' is selected for the date range even if all dates in the range are not specified.
 - If a DATE that has not yet occurred has multiple CIGN references, it will convert to a 'Specific Date' System Rule.
- Converting into Private Rules:
 - All other DATES that have not yet occurred and do not meet the above criteria will convert to Private Rules.
- No Conversion:
 - The DATES not meeting any of the above criteria are considered invalid and will not convert to Rules.
 - Invalid dates are highlighted in red in Table 1.
 - All the ScheduleXpress lines referencing the invalid dates will not convert and are highlighted in red in Table 2.
 - A CIGN value highlighted with a yellow background indicate it is not referenced and cannot be converted.

Comments and Directives:

2

Table 2: Rule and Schedule Mailbox Assignments

View: Rule Assignments ☐ Filtered Commit Excluded Items

Line	CIGN	TYPE	Imported Data	MEMO	Rule	Rule Summary	Type	Schedule MBID	Schedule Mailbox Name
6	9019	DAYS	MON TUE WED THU FRI	Normal weekday schedule JC...	Weekly Schedule		System		
7	7441	DAYS	MON TUE WED THU FRI	Normal weekday schedule LE...	Weekly Schedule		System		
8	7441	DATE	01/01/2014	New Years Day	New Years Day		System		
9	7441	DATE	01/20/2014	MLK Holiday	Martin Luther King Day		System		
10	7441	DATE	02/17/2014	Presidents Holiday	President's Day		System		
11	7441	DATE	05/26/2014	Memorial Day Holiday	Memorial Day		System		
12	7441	DATE	07/04/2014	Fourth of July Holiday	Independence Day		System		
13	7441	DATE	09/01/2014	Labor Day Holiday	Labor Day		System		
14	7441	DATE	11/10/2014	USA Thanksgiving	USA Thanksgiving		System		
15	7441	DATE	11/27/2014	Christmas Eve	Christmas Day		System		
16	7441	DATE	12/25/2014	Christmas Day	Christmas Day		System		
17	7441	DATE	12/31/2025	Emergency Closure	New Year's Eve		System		
18	7400	DAYS	MON TUE WED THU FRI	Normal weekday schedule FR...	Weekly Schedule		System		
19	7400	DATE	01/01/2014	New Years Day	New Years Day		System		

(1) Table 1: SX Data to Rule Assignment

Table 1 displays the results of the MiCollab AM Scheduler data analysis assigned with matching rules. Based on the analysis of dates defined in the MiCollab AM Scheduler file, the country is automatically detected and the dates are assigned with the matching predefined holidays or existing rules that were already configured in the system.

- **Existing rules:** Refer to the Schedule Override rules that are already defined in the **Schedule Override Rules** tab of the **System Configuration**. The Schedule Override rules may vary from national holidays to departmental time-offs since any schedules that will override weekly schedule can be defined as Schedule Override rules. If there are any holidays that are already defined as Schedule Override rules in the **System Configuration**, the dates from the imported MiCollab AM Scheduler data will be assigned with the existing rules first.
- **Predefined holidays:** Refers to the national holidays or holiday ranges that are defined by the system. Currently, the holidays have been defined for the following countries: Australia, Canada, Great Britain, Mexico, New Zealand, and U.S.A. For the conversion, the dates from the imported MiCollab AM Scheduler data will be assigned with the existing rules first, and then the predefined holidays.

NOTE The country is determined automatically by examining DATES in the MiCollab AM Scheduler file. However, you can manually define the country by adding the COUNTRY directive in the MiCollab AM Scheduler file before importing. Refer to Using Directives in MiCollab AM Scheduler File for more details about using Directives.

- **SX Date:** Based on DAYS or DATES defined in the DETAILS column of the MiCollab AM Scheduler CSV file, any matching dates to either existing rules or predefined holidays in the system are displayed in this column.
- **Specific Date:** Refers to the exact date defined in the DETAILS column of the selected CSV file. These date values are used to look up matching holidays or rules in the system.
- **'Not in Use':** Refers to the predefined holidays in the system that did not have any match found in the MiCollab AM Scheduler data. In order to make these items as valid rules, uncheck the Exclude checkbox, and double click the column to open the Rule Editor to edit the rule.
- **New Proposed Rule Name:** If the SX Dates match any predefined holidays in the system, the matching holiday names are automatically assigned and appear in this column.

NOTE Any expired dates are also listed in this column in red text with the indication 'Expired!' followed by the **MEMO** associated with the specified date.

- **Type:** Displays the type of the rule that was automatically assigned. The available rule types are System, Private, or Custom.
- **Existing Rule Name:** If SX Dates match any of the existing rules that are already configured in the system, the matched rule name to the date appears in this column.
- **Rule Summary:** If SX Dates match any predefined holidays in the system, the rule summary of the holiday is displayed in this column. If SX Dates match any existing rules, the rule summary of the matched existing rule is displayed. For SX Dates that are expired, the expired dates and recommended rules are displayed in red text under Rule Summary.

The rule summary formats are:

- NOTE (F) denotes floating and (W) denotes alternate 'Weekly Schedule'.
- Weekday of each month: (Example) First Friday of Each Month
- Day of each month: (Example) 3rd Day of Each Month
- Day of each month (F): (Example) 3rd Day of Each Month (F)
- Weekday of each year: (Example) Third Monday in January
- Day of each year: (Example) December 25
- Day of each year (F): (Example) December 25 (F)
- Day of each year (W): (Example) December 25 (W)
- Specific date: (Example) December 18, 2014
- Specific date (W): (Example) December 18, 2014 (W)
- Date range: (Example) 12/18/2014 - 12/31/2014
- Date range (W): (Example) 12/18/2014 - 12/31/2014 (W)
- **Exclude:** Clicking the Exclude checkbox excludes the selected item from being converted. Once the item is excluded in Table 1, it is also excluded from Table 2. The excluded items appear with a grey background.
- **Filter Table 2 by:** See Filtering Table 2.

(2) Table 2: Rule and Schedule Mailbox Assignment

Table 2 displays the results of the rule assignments from Table 1 with the schedule mailboxes that the assigned rules would belong to. Based on the analysis of the data imported from the MiCollab AM Scheduler file, the new Schedule mailboxes will be proposed for each CXIN line, and all the rules that are defined for the CXIN line will be assigned to the same Schedule mailbox.

Imported Data

Imported Data refers to the MiCollab AM Scheduler data.

- **Line:** Indicates the line number in the imported MiCollab AM Scheduler file.
- **CXIN:** Indicates the numeric CXIN values defined in the imported MiCollab AM Scheduler file.
- **CXOUT:** Indicates the CXOUT value defined in the imported MiCollab AM Scheduler file.
- **TYPE:** Indicates the TYPE value defined in the imported MiCollab AM Scheduler file.
- **DETAILS:** Indicates the DETAILS value defined in the imported MiCollab AM Scheduler file.
- **TIME:** Indicates the TIME value defined in the imported MiCollab AM Scheduler file. The TIME values are used to create schedules for each rule representing the start time of the schedule for the specified **CXIN** line.
- **MEMO:** Indicates the MEMO values defined in the imported MiCollab AM Scheduler file. The MEMO values usually represent the rule name.

Proposed Assignments

Proposed Assignments refer to the automatic assignments of the CXIN value to the new Schedule mailboxes that will handle calls based on the weekly schedule and schedule override rules assigned in Table 1.

- **Rule:** Displays the assigned rule from Table 1.
- **Rule Summary:** Displays the summary of the assigned rule from Table 1 (Rule Assignment View Type Only).
- **Type:** Displays the rule type of the assigned rule. The available rule types are System, Private, or Custom. To find out about how each rule type is converted from the MiCollab AM Scheduler data, read *Conversion Criteria* in the conversion editor.
- **Schedule MBID:** Displays the mailbox ID (MBID) of the new Schedule mailbox that will be created for the specified CXIN line. Multiple rules can be assigned to a Schedule mailbox.
- **Schedule Mailbox Name:** Displays the name of the new schedule mailbox that will be created for the specified CXIN line. Multiple rules can be assigned to a schedule mailbox. The name of the new schedule mailbox is generated automatically by examining the MiCollab AM Scheduler data for the associated CXIN.
- **Action:** Displays the optional initial action that will handle the specified line.
- **Argument:** Displays the argument associated with the action.
- **Call Processor:** Displays the call processor mailbox that will handle the specified line.
- **Exclude:** Clicking the Exclude checkbox excludes the selected item from being converted. Once the item is excluded in Table 1, it is also excluded from Table 2. The excluded items are displayed with a grey background.

(3) Conversion Criteria

Conversion Criteria explains how the MiCollab AM Scheduler data will be converted into different types of rules. It also explains the instances the data will not be converted. It is highly recommended that you read through this section to get a better understanding of how the MiCollab AM Scheduler is being converted.

(4) Finalizing or Canceling Conversion

The conversion isn't complete unless you click the **Finish** button. You can click **Cancel** at any time to stop the conversion and return to the MiCollab AM Admin dialog box.

Click **Help** to view the help content.

NOTE Clicking **Cancel** will discard all the changes you made to the data inside the conversion editor.

Definition of Colors Used in the Conversion Editor

Background Colors

- **Light Grey:** Indicates excluded rules from Table 1, which will not be converted.

- **Dark Grey:** Indicates excluded rules from Table 2, which will not be converted.
- **Yellow:** Indicates unreferenced CXINs, which will not be converted.

Font Colors

- **Red:** Indicates expired dates and will not be converted.
- **Green:** Indicates comments, which are lines of text in the MiCollab AM Scheduler data that are for informational purposes only and are not converted.
- **Blue:** Indicates Directives defined in the TYPE column of the MiCollab AM Scheduler file. Refer to Using Directives in MiCollab AM Scheduler File for more details about Directives.

Rule Type Colors

- **Green** indicates System rule.
- **Blue** indicates Private rule.
- **Pink** indicates Custom rule.

Using Directives in MiCollab AM Scheduler File

Directives can be defined in the MiCollab AM Scheduler file to be used for the conversion. There are two directives you can define in the TYPE column of the MiCollab AM Scheduler file - COUNTRY and TITLE. Using COUNTRY forces the data to be matched with the rules based on the predefined holidays of the specified country. Using TITLE forces the names of the new Schedule mailboxes to follow what are specified as the TITLE directives.

NOTE These Directives are valid only for the conversion and have no effect on MiCollab AM Scheduler functionality.

- **COUNTRY**

- To force the country, add the following line to the CSV file.

```
,,COUNTRY,cc,,
```

- cc can be AU, CA, GB, MX, NZ, or US for Australia, Canada, Great Britain, Mexico, New Zealand, and USA.

(Example)

```
CXIN,CXOUT,TYPE,DETAILS,TIME,MEMO,,COUNTRY,NZ,,
```

- **TITLE**

IMPORTANT If you want to force titles of the new Schedule mailboxes by using the TITLE directive, you must force titles for all CXINs in the file.

- To force titles, add either of the following lines for each CXIN anywhere in the CSV file.

```
CXIN,,TITLE,,,<title>
```

```
CXIN,,TITLE, <title>,,,
```

- Alternatively, any of the following can be added just prior to the first use of each CXIN in the CSV file.

```
,,TITLE,<title>,,,
```

```
,,TITLE,,,<title>
```

(Example)

```
CXIN,CXOUT,TYPE,DETAILS,TIME,MEMO,1111,,TITLE,HR Department,,,1111,,,  
TITLE,,,HR Department
```

```
,,TITLE,HR Department,,,TITLE,,,HR Department
```

Editing Rules

Double-clicking any item in Table 1 opens the Rule Editor so you can edit the rules that were automatically assigned to the MiCollab AM Scheduler dates. Please note you cannot edit rules for the following cases:

- Existing rules cannot be edited.
If the Existing Rule Name column is filled with a name, it means it's an exact match and cannot be edited.
- Invalid rules cannot be edited.
Any rules in red text indicate they have expired dates and cannot be edited.
- Excluded rules cannot be edited.
Any rules with a grey background cannot be edited. In order to edit an excluded rule, uncheck the **Exclude** checkbox and double-click the item.

NOTE Once **Commit Excluded Items** has been performed, the rules cannot be edited.

Viewing and Editing Schedule

In order to edit schedules for rules, **Commit Excluded Items** must be performed. Once exclusion is committed, double-clicking any item in Table 2 opens the scheduler, so you can view, add, or edit the schedule for that item. Please note you cannot edit schedules for the following cases:

- If **Commit Excluded Items** was not performed, schedules cannot be viewed or edited.
- Any unreferenced CXIN lines are highlighted in yellow and cannot be edited.

Filtering Table 2

The **Filter Table 2** by drop-down list in Table 1 allows you to filter Table 2 by the entity selected in the list. When an entity is selected in the list, Table 2 will display only the items that include the selected entity.

The available filter options are:

- **None:** No filter is applied.
- **Selected SX Date:** Clicking Selected SX Date filters Table 2 to display only the items with the matching Selected SX Date.
- **Selected Rule:** Clicking Selected Rule filters Table 2 to display only the items with the matching Selected Rule.

Once a filter is applied to Table 2, the **Filtered** checkbox in Table 2 gets checked automatically to indicate that the only filtered items are being displayed in Table 2. Unchecking the **Filtered** checkbox returns to the unfiltered view that was being displayed before the filter was applied.

NOTE The **Filtered** checkbox is inactive if **None** is selected in the **Filter Table 2 by** drop-down list in Table 1. It becomes active only when a filter is selected.

Displaying Different Views in Table 2

Based on the view selected in the **View** drop-down list in Table 2, a different view is displayed. Each view type has a different combination of entities.

View Types

- **Rule Assignment:** Displays the imported MiCollab AM Scheduler data with its proposed rules and Schedule mailboxes the rules belong to.

[Entities displayed in Table 2]

- Imported Data: Line, CXIN, TYPE, DETAILS, MEMO
- Proposed Assignments: Rule, Rule Summary, Type, Schedule MBID, Schedule Mailbox Name

- **Schedule Mailbox Assignment:** Displays only Line Number and CXIN from the MiCollab AM Scheduler data and the Schedule mailboxes that process the specific CXIN lines.

[Entities displayed in Table 2]

- Imported Data: Line, CXIN
- Proposed Assignments: Schedule MBID, Schedule Mailbox Name

- **Imported MiCollab AM Scheduler Data Only:** Displays only the data imported from the MiCollab AM Scheduler CSV file.

[Entities displayed in Table 2]

- Imported Data: Line, CXIN, CXOUT, TYPE, DETAILS, TIME, MEMO

- **Details:** This is the list of full results of analysis of the MiCollab AM Scheduler data and its matching rules and Schedule mailboxes. This view displays all fields found in the MiCollab AM Scheduler data and the matching rules and Schedule mailbox information.

[Entities displayed in Table 2]

- Imported Data: Line, CXIN, CXOUT, DETAILS, TIME, MEMO
- Proposed Assignments: Rule, Type, Schedule MBID, Schedule Mailbox Name, Action, Argument, Call Processor, Exclude

- **Details – Excluded Items Only:** Displays the detail view of only the excluded items from Table 1 and Table 2.

[Entities displayed in Table 2]

- Imported Data: Line, CXIN, CXOUT, DETAILS, TIME, MEMO
- Proposed Assignments: Rule, Type, Schedule MBID, Schedule Mailbox Name, Action, Argument, Call Processor, Exclude

- **Details – Comments, Directives, and Invalid Lines Only:** Displays the detail view of only the items that are categorized as Comments, Directives, and Invalid Lines.

- **Comments** (green): Any notes or memos in the MiCollab AM Scheduler file that have no effect to the conversion.
- **Directives** (blue): The COUNTRY or TITLE directives that are used to force some data in the MiCollab AM Scheduler file to be converted the way they are defined. Refer to Using Directives to find out more about how directives work.
- **Invalid Lines** (red): Any dates that are expired or lines that are unreferenced.

[Entities displayed in Table 2]

- Imported Data: Line, CXIN, CXOUT, DETAILS, TIME, MEMO
- Proposed Assignments: Rule, Type, Schedule MBID, Schedule Mailbox Name, Action, Argument, Call Processor, Exclude

Committing Excluded Items

The **Commit Excluded Items** button confirms that the items that are checked to be excluded in both Table 1 and 2 are being eliminated from conversion. Once the exclusions are performed, the excluded items will appear greyed out, and no more exclusions can be made to the file.

Upon clicking the button, a warning message is displayed informing that committing excluded items will not allow the rules to be edited anymore, and the exclusion cannot be changed.

- Clicking **OK** in the warning dialog box commits the exclusions. After being committed, the schedules associated with a Schedule mailbox can be viewed and edited.
- Clicking **Cancel** cancels the action and returns to the conversion editor.

Finishing up Conversion

Click the **Finish** button to perform the actual conversion of the MiCollab AM Scheduler data. When you click Finish, you will be given a summary of conversion of the items that will be converted into rules and Schedule mailboxes in a new popup window.

Clicking **Yes** on the summary of conversion window will perform the actual conversion. Click **No** if you don't want to proceed with the conversion.

WARNING Once the conversion is finished, the database, MiCollab AM Scheduler data, and new rules and mailboxes cannot be reverted.

After the conversion is successfully completed, the location where a summary of conversion file will be created will be displayed in the new popup window.