

Amanda Portal Appointment Reminder Setup and Usage

This document outlines how to setup and use Amanda Portal's appointment reminder application. Once setup, this application is used by logging into the Amanda Portal server via web browser using the system administrator mailbox number and password. Once logged into the application screen, appointment reminder campaigns can be created and executed as desired. This application will call each number within the text file containing the appointment dates and times reminding the called party of their appointment date and time. Once each appointment reminder has been executed, the entry is removed from the file and an activity log file is updated with the results.

Please Note: Appointment reminder date and times must be in the future. Entries in the appointment reminder callout file with dates and times that have already passed will be skipped. Also, once an appointment reminder is scheduled, that appointment reminder campaign will be run on all restrict to days starting at the time the campaign is set to run. The callout list file must be replaced each day you would like the campaign to run. For example, if you would like the appointment reminder to run every weekday between 9:00am and 5:00pm you would set the restrict to days to Monday – Friday and times to 9:00am through 5:00pm. The appointment reminder csv file must be replaced or updated before 9:00am on the following day.

Setup

Before this application can be used, the Amanda Portal system administrator must do the following:

- 1) Obtain and unzip the **updateserver165.zip** file. This file can be obtained from Amanda technical support or can be found on Amanda Product CD version 2.04d or above. Once unzipped, select all files and folders and copy them into the Amanda Portal install folder (by default C:\Amanda>).
- 2) Run Amanda Portal Configure from the Amanda Server program group. Add **AppReminder.tcl** to the global parameter **tcl_source_files**. Set the value and click ok to close configure.
- 3) Stop the Amanda service. Once stopped wait one minute and then re-start the Amanda service.

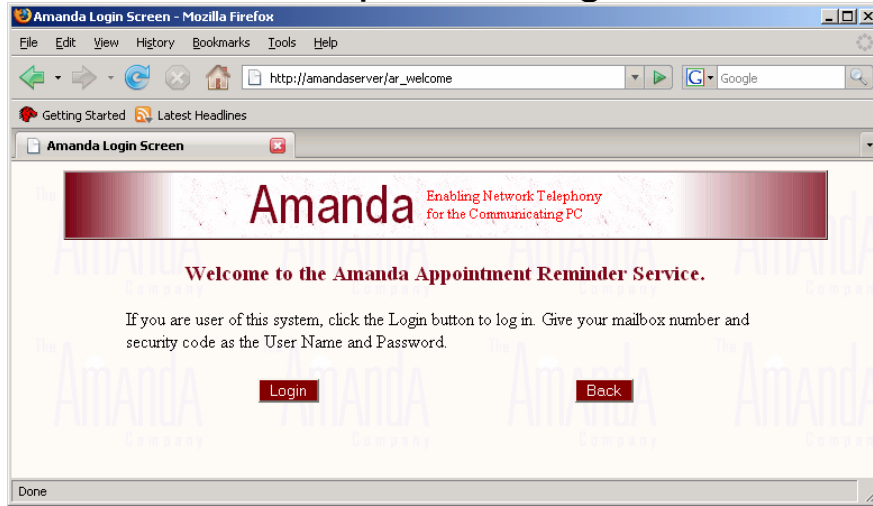
Usage

Once you're ready to setup your first appointment reminder campaign, open a web browser (either Mozilla Firefox or Microsoft Internet Explorer) and point the web address to:

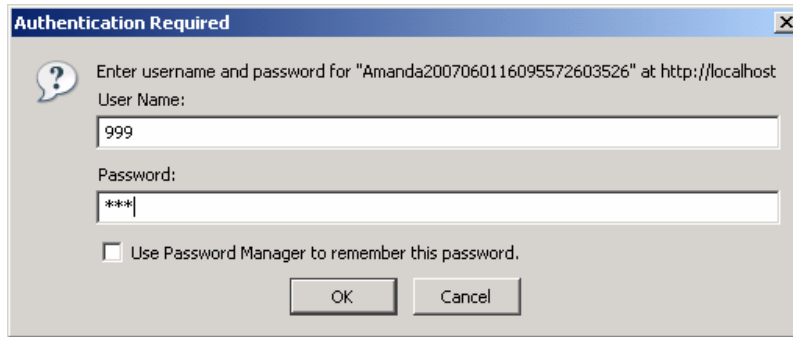
http://amandaserver/ar_welcome

You'll see the following login screen:

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Click the login button and you will be prompted to enter a user and password:



Enter 999 as the user name, and the security code for mailbox 999 as your password. If the user name and password you entered match, you will be logged into the appointment reminder service screen:

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Appointment Reminder Service

Primary mailbox to run the campaign from	<input type="text" value="(11)"/>	Record greeting 1 of the primary mailbox to announce the appointment reminder. Record greeting 2 if using TTS of the primary mailbox to state: "This appointment is for: <name>." Record greeting 3 of the primary mailbox to announce additional information.
Telephone callout list file (CSV format)	<input type="text" value="ar.csv"/>	Formatted as: phone,date,time,name (date and time is formatted as: MM/DD/YYYY,HH:MM)
Activity log file (CSV format)	<input type="text" value="ar_log.csv"/>	Formatted as: name,phone,date,time,result (date and time is formatted as: MM/DD/YYYY,HH:MM)
Setup ports for port group	Start port range <input type="text" value="0"/> End port range <input type="text" value="0"/>	
Number of rings to wait for callee to answer	<input type="text" value="4"/>	

For simplicity, the appointment reminder screen has been broken up into sections and described on the following pages.

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Appointment Reminder Parameters and Definitions:

This section of the document describes all the appointment reminder parameters and what they are used for. Before an appointment reminder campaign can be run, these parameters must be assigned appropriate values.

Parameter	Definition
Primary mailbox to run the campaign from	<p>Using the drop down list, select a mailbox to be used with the campaign. The purpose of the mailbox is to provide the greetings to be played to the called party. Greeting 1 must be recorded. Greetings 2 and 3 are optional.</p> <p>Greeting 1 Example "This is <organization> calling to remind you of your upcoming appointment on..." Greeting 2 Example "This appointment is for ... " Greeting 3 Example "To cancel or re-schedule your appointment please call xxx-xxx-xxxx"</p>
Telephone callout list file (CSV format)	<p>Enter the name of the text file containing the list of telephone numbers to call. This file must be in a CSV format and be copied into the Amanda Portal install folder (c:\Amanda by default). Each line in the file must be formatted as:</p> <p><phone>,MM/DD/YYYY,HH:MM,<name></p> <p>Note: Phone numbers must be either 7 or 10 digits in length, and must include a 1 if long distance.</p>
Activity Log File (CSV format)	<p>This file will be created by the application and will contain the results of the appointment reminder campaign. Each entry in the file will contain:</p> <p><name>,<phone>,<date>,<time>,result</p> <p>The result can be:</p> <p>ANSWER – The call was answered. NO ANSWER requeued – The call was not answered and requeued. Invalid phone – Phone number in the list file is invalid. Appointment passed – The appointment time and date has already passed so the reminder is skipped. Fail requeued – The outbound call failed and was requeued. Fail aborted. – The outbound call failed the maximum number of attempts and was aborted.</p>
Setup Ports for Port Group	<p>Using the start and end port range drop down boxes this is where you define the ports to be used to execute the campaign. For example you might choose to use ports 2-3 on a four port system, or ports 5-8 on an 8 port system.</p>
Number of rings to wait for callee to answer	<p>This parameter determines how many rings Amanda will wait for the called party to answer. If a caller does not answer within this number of rings, the result of the call will be "NO ANSWER" and re-queued if applicable.</p>

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Restrict to times of day	<input type="checkbox"/> Sunday										
	<input checked="" type="checkbox"/> Monday	Between	Hour	0	Minute	0	To	Hour	23	Minute	59
	<input checked="" type="checkbox"/> Tuesday	Between	Hour	0	Minute	0	To	Hour	23	Minute	59
	<input checked="" type="checkbox"/> Wednesday	Between	Hour	0	Minute	0	To	Hour	23	Minute	59
	<input checked="" type="checkbox"/> Thursday	Between	Hour	0	Minute	0	To	Hour	23	Minute	59
	<input checked="" type="checkbox"/> Friday	Between	Hour	0	Minute	0	To	Hour	23	Minute	59
	<input type="checkbox"/> Saturday										

Restrict to times of day	Here you must enable or disable the days of week and times of day the campaign will be allowed to execute. Clicking on the check box next to a particular day will enable that day of the week and allow the time of day to be defined. Restricting the times of day is important because you don't want the campaign to run too early in the morning or late in the evening.
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What action to take when calling out and get the following result:

On answer

Times to play greeting

Pausing between each time seconds

Use text-to-speech (TTS) for <name> in telephone callout list

On ring-no-answer or busy

Times to retry calling

With a retry wait interval minutes.

Save Campaign Settings (Re-)Start Campaign Abort Campaign Logout

What action to take when calling out and get the following result:	This section is used to define the action Amanda will take when a call is answered, on ring no answer, or busy.
Times to play greeting	This parameter is used to tell Amanda how many times to play the greeting to the called party after a call is answered.
Pausing between each time	This parameter is used to add a pause between greeting playback.
Use text-to-speech (TTS) for <name> in telephone callout list	This feature can only be used if SAPI5 has been installed only your system. When installed, and this parameter is enabled, Amanda Portal will speak the name of the person the appointment reminder is for. When using this feature you must record greeting 2 of the

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	primary mailbox to say something like “This appointment is for ...”
Times to retry calling	Sets the number of retry attempts after a ring-no-answer or busy.
With a retry wait interval	Sets the amount of time to wait between retry attempts after a ring-no-answer or busy.
Save Campaign Settings	This button is used to save the campaign settings. Be sure to set all the appropriate values and parameters before you save the campaign settings.
(Re-)Start Campaign	Used to start or re-start the appointment reminder campaign. Click this button after saving the campaign settings to run the campaign.
Abort Campaign	Ends a campaign that is scheduled or currently running.
Logout	Used to logout of the Appointment Reminder web interface.

Troubleshooting

Error Message	Cause	Solution
Failed to see the campaign info by tag	Some appointment reminder settings have not been set.	Make sure to assign a valid telephone callout list file and activity log file.
Failed to see the campaign info by tag; Failed to get control: campaign_status	There isn't a Telephone callout list file defined. Please create CSV file and set the value. This error message generally follows “Failed to see the campaign info by tag”.	Make sure to assign a valid telephone callout list file and activity log file. Also make sure your callout list file entries are in the correct format.
Failed: Record Greetings	Greeting 1 has not been recorded for the primary mailbox to run the campaign.	Record greeting 1 of the primary mailbox. Greeting 2 only needs to be recorded if SAPI5 has been installed and you want to use text to speech to playback the name of the called party. Greeting 3 is optional.

Important Note: After encountering an error message such as “Failed to see the campaign info by tag” or “Failed to get control: campaign_status” you must logout of the appointment reminder screen and login again correcting the missing settings before you can successfully save and run a campaign.

Tip: Once an appointment reminder has been scheduled, you can use Amanda Portal Station’s job queue to view the appointment reminder calls that are queued.