Administrator's Guide

AudioCodes Voice.AI Solutions

Voca Conversational IVR

Version 9.1

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Related Documentation

Document Name
Voca Release Notes
Voca Installation Manual

Document Revision Record

LTRT	Description
28839	Initial document release for Version 9.1.0.

Software Revision Record

Software Revision	Release Date
9.1.0	January 2022

Table of Contents

1 Introduction

Voca provides a state-of-the-art voice recognition service for enterprises, enhancing day-to-day customer interface and employee productivity by making organizational contacts easily accessible from multiple user environments by voice.

Combining powerful speech recognition engine with a simple-to-use conversational interface, Voca introduces a reliable, 24x7 call routing solution that reduces costs, increases the employee's productivity and enhances caller experience and satisfaction. Voca easily integrates with any standard PBX based on analog, digital and IP network protocols and can be deployed as a secured cloud service or On-premises.

About this Guide

This guide, intended for organization administrators responsible for administering the enterprise telephony system, describes how to configure and manage the Voca service offered in Software as a Service (SaaS) model or as an On-premises solution on the Mediant 800, using AudioCodes' Web-Based Management Tool (hereafter referred to as Web interface).

Voca Benefits

The following is a list of the benefits that Voca offers:

- Plug-and-play
- Easy to use
- High recognition rates
- Interfaces to all PBXs (SIP / FXO)
- Automatic update of Contact names (from Microsoft Active Directory or CSV file)
- User friendly interface for update of content (Departments, Branch lists)
- Cost reduction, increased productivity by saving time in searching contact details

AudioCodes PBX Connectivity

To connect locally to any PBX, the Voca service uses one of AudioCodes’ SBCs or Gateways as a connectivity appliance, designed to provide converged Voice & Data services for small-to-mid size business (SMB) customers, and to form a well-managed point of demarcation for service providers. The appliance is based on AudioCodes’ VoIPerfectHD best-of-breed Media Gateway technology, integrating a variety of communication functions into a single platform to support fundamental services, such as VoIP mediation, Data Routing, WAN access, Voice & Data security, survivability, and third party value-added services applications. These services allow smooth connectivity to cloud services.

The appliance is built upon a highly interoperable VoIP Media Gateway that can be delivered in several pre-defined configurations, supporting a single E1/T1/J1 trunk or up to 8 analog (FXO) ports. In addition, the Mediant 800 MSBR provides enhanced dialing plans and voice routing capabilities along with SIP to SIP mediation, allowing business customers to enjoy the benefits of SIP Trunking services, IP Centrex connectivity, Unified Communications, as well as flexible PSTN and legacy PBX connectivity to VoIP.

2 Getting Started

This section describes how to log in to Voca Web Management.

Logging in to Voca

There are two ways of running Voca. It can be run remotely from the cloud or be installed on a PC on the premises (On-premises).

Changing User Interface Language of Voca

Voca allows you to set your system's user interface to one of the following languages:

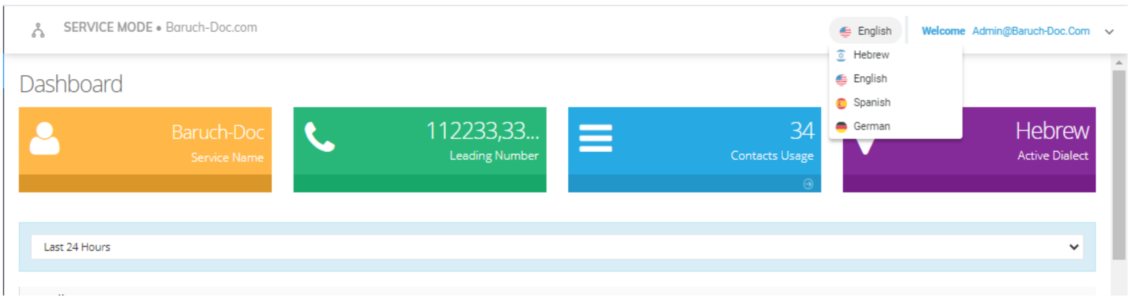
- English
- Spanish
- German
- Hebrew

Languages can be changed from the main menu.

➢ **To change the language from the main menu:**

- Hover the cursor over the language button, and then select the desired language.

Figure 2-1: Changing Language from Main Menu



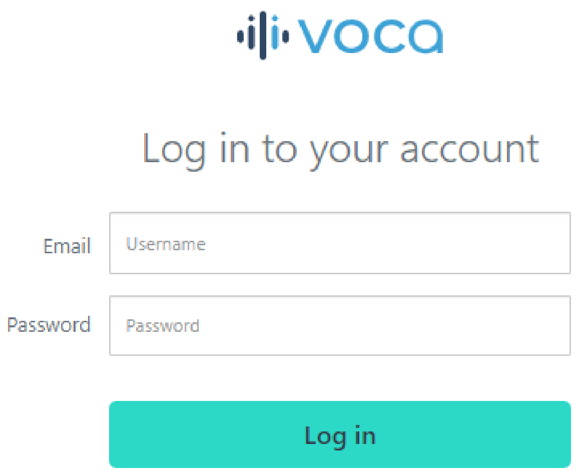
Using Cloud

The procedure below describes how to log in to Voca using the cloud software.

➢ **To log in to Voca using the Cloud:**

1. Open your Web browser and navigate to https://admin.acvoca.com.

Figure 2-2: Login



2. Enter the Username (previously sent to the customer email) and Password (that the customer defined) and click **Log in**; the customer Dashboard appears (see Getting Familiar with the GUI).

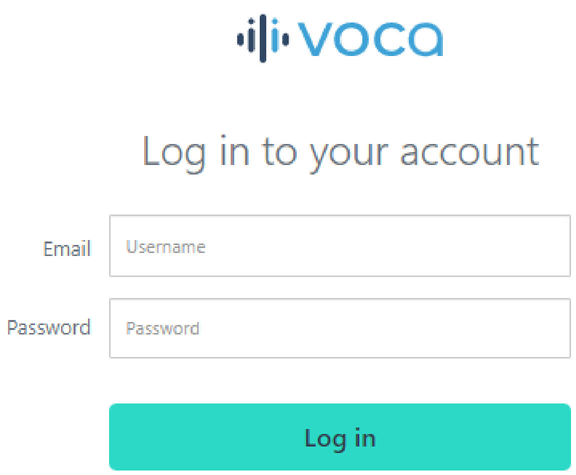
Using On-premises

The procedure below describes how to log in to Voca using On-premises.

➢ **To log in to Voca using On-premises:**

1. Open your Web browser and navigate to https://<IP_Address >, which is the IP address given to you by AudioCodes (e.g., https://10.21.20.40).
2. Enter the **username** and **password** provided to you by AudioCodes.
3. Click **Login**.

Figure 2-3: Login



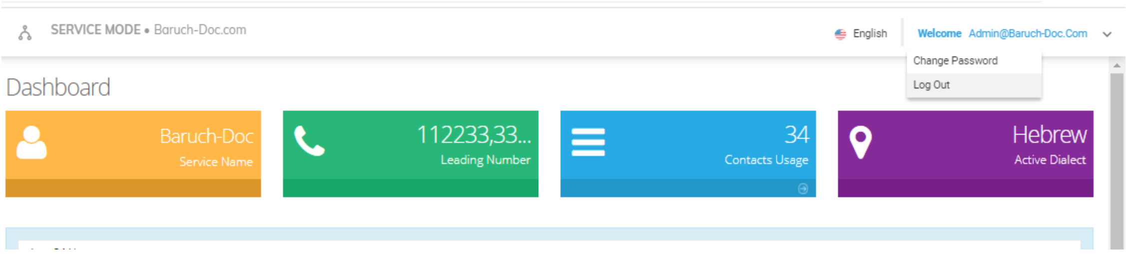
Changing your Password

The procedure below describes how to change the login password.

➢ **To change the login password:**

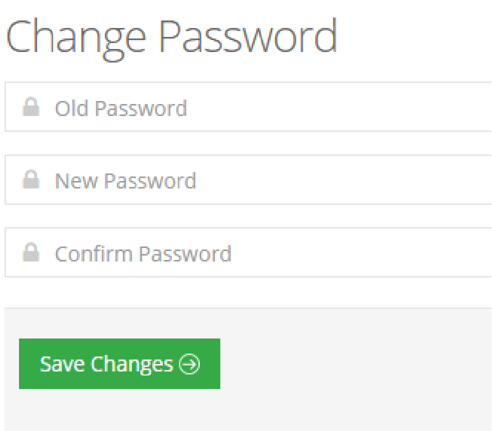
1. Place the cursor on the Voca username, on the upper-right corner of the screen; the following screen appears:

Figure 2-4: Dashboard with Change Password



2. Select **Change Password** to change the password after initially logging in using the default (recommended); the following screen appears:

Figure 2-5: Change Password



3. In the 'Old Password' field, enter your previous password.
4. In the 'New Password' field, enter your new password.
5. In the 'Confirm Password' field, re-enter the new password.
6. Click **Save Changes** to save your changes.

Getting Familiar with the GUI

Figure 2-6: Dashboard

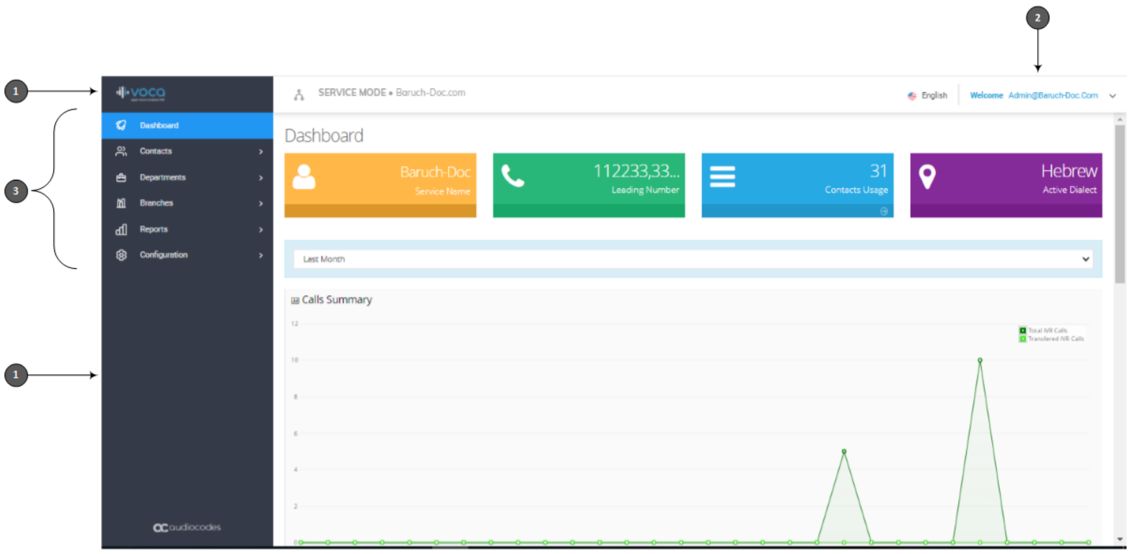


Table 2-1: Toolbar

Item #	Description
1	Toolbar
2	Voca username
3	Menu options
4	Graphical summary

Menu Options

Based on the available licenses, the following menu options are displayed:

- **Dashboard** – This option displays Customer Name, Leading Number, Contacts Usage, Active Dialect and graphical summary statistics.
- **Contacts** - This option allows you to manage details of all your contacts, including adding, editing and deleting contacts. You can also import and export your Contact list using CSV files.
- **Departments** - This option allows you to manage your Department Dictionaries and details of all your departments inside the Department Dictionary. The Department Dictionary is a list of departments which belong to a specific Application Support Package (ASP) and may be used as separate grammar when performing voice detection. Using the Departments menu, you can add, edit and delete Department Dictionaries and Departments. You can also import and export your Departments list from the ASP or from CSV files.

- **Branches** - This option allows you to manage details of your branches, unmapped cities, automatic mapping of unmapped cities, overlapping branches and auto-arrange by distance.
- **Reports** - This option allows you to produce a range of reports.
- **Configuration** - This option allows you to configure various Voca system settings.

Dashboard

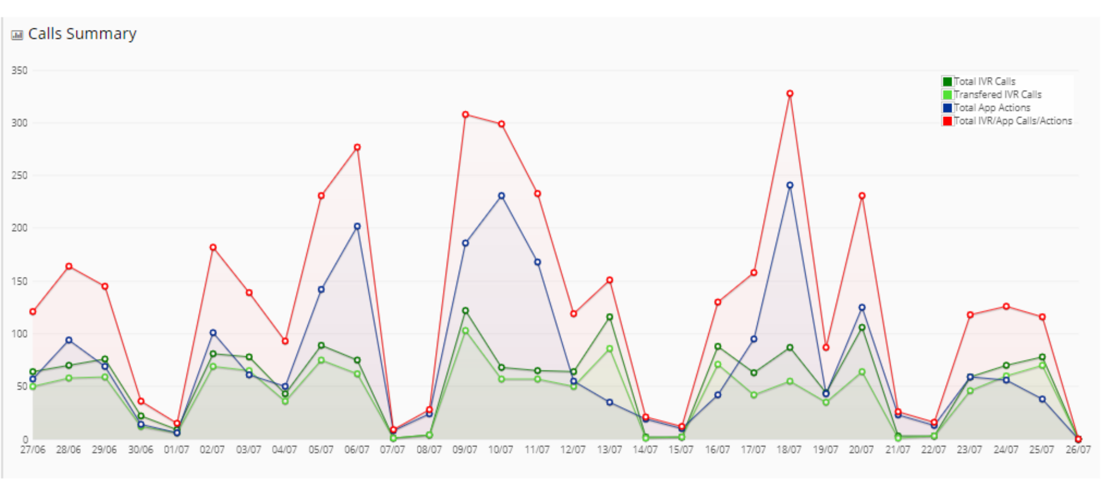
The following Dashboard titles appear in the colored boxes:

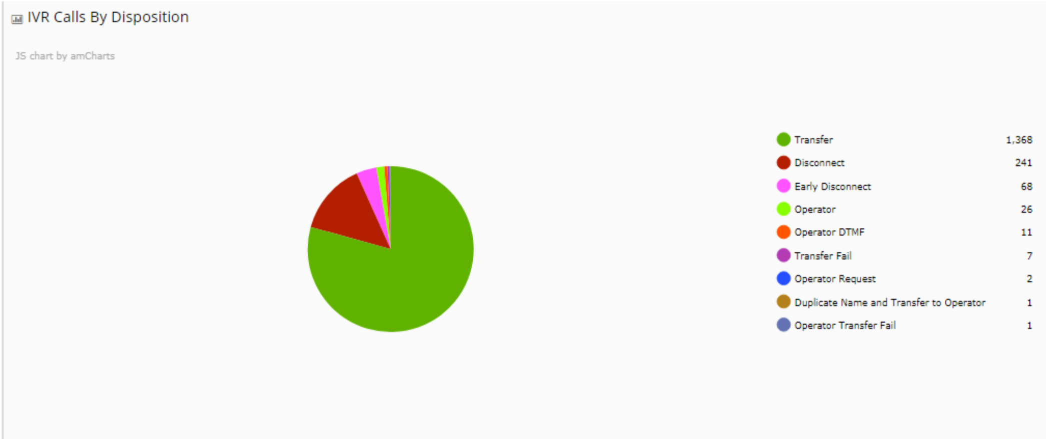
- Customer Name - Displays the Customer or Company name
- Leading Number - Displays the access numbers to the Voca service.
- Contacts Usage – Displays the number of users, departments and branches imported into Voca.
- Active Dialect – Displays the main supported language.

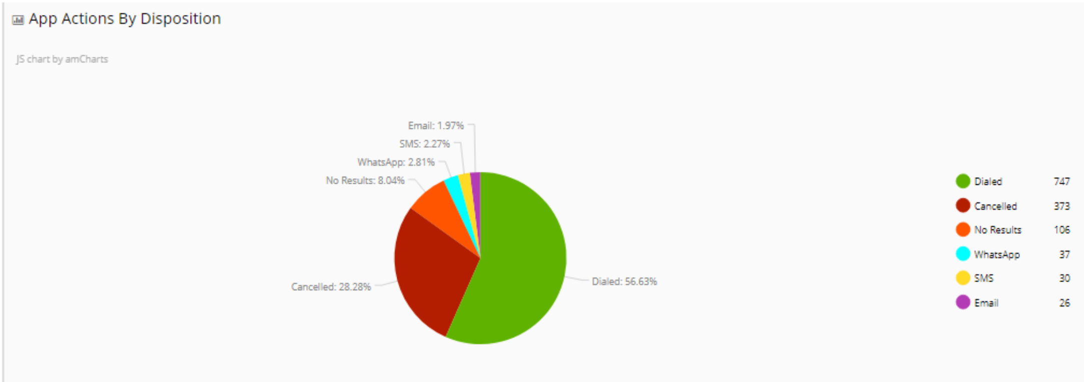
The dashboard also displays graphical summaries based on calls made in:

- Last 24 hours
- Last week
- Last month

Figure 2-7: Graphical Summaries







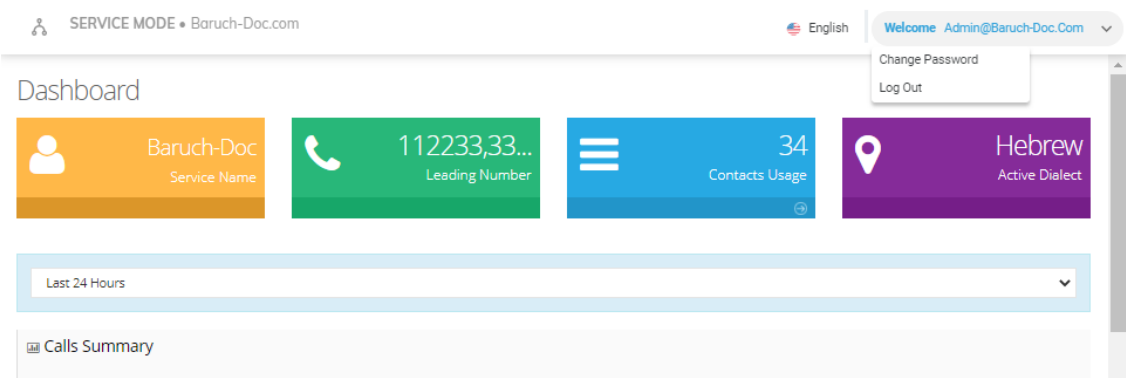
Logging Out

The procedure below describes how to log out from Voca.

➢ To log out from Voca:

1. Place the cursor on the Voca username, on the upper-right corner of the screen; the following screen appears:

Figure 2-8: Dashboard with Log Out



2. Select **Log Out**.

Getting Help

If necessary, contact support@acvoca.com for help with Voca.

3 Managing Contacts

One of VocaNOM's capabilities is to route calls to contacts by saying the contact's name. The Administrator can manage the contacts in several ways:

- Automatic synchronization using LDAP or a CSV file
- Manually importing a CSV file
- Adding/Editing/Deleting using the VocaNOM Web interface

Automatic synchronization using LDAP or a CSV file requires running and setting an external tool. If you are using the Cloud version, you need to run the tool on a local company server. If you are using the On-premises version, you can run the tool on the VocaNOM server.

For more information, refer to Configuring LDAP Settings on page 157.

Contact Details Actions

This section describes the various Contact Details actions that can be performed.

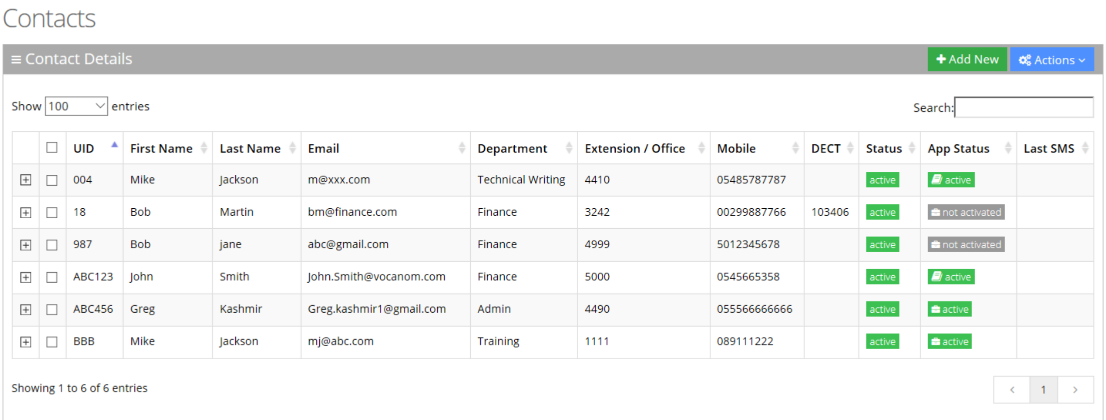
Adding a Contact

The following describes how to add a contact.

➢ **To add a contact:**

1. Open the Contact Details page (**Contacts** > **Contacts List**).

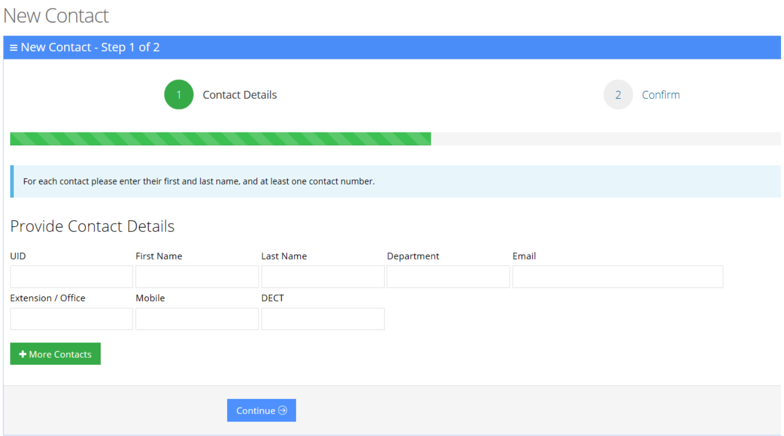
Figure 3-1: Contacts List



UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active	
18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	not activated	
ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665358		active	active	
ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	active	
BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	

2. Click **Add New**; the following screen appears:

Figure 3-2: New Contact

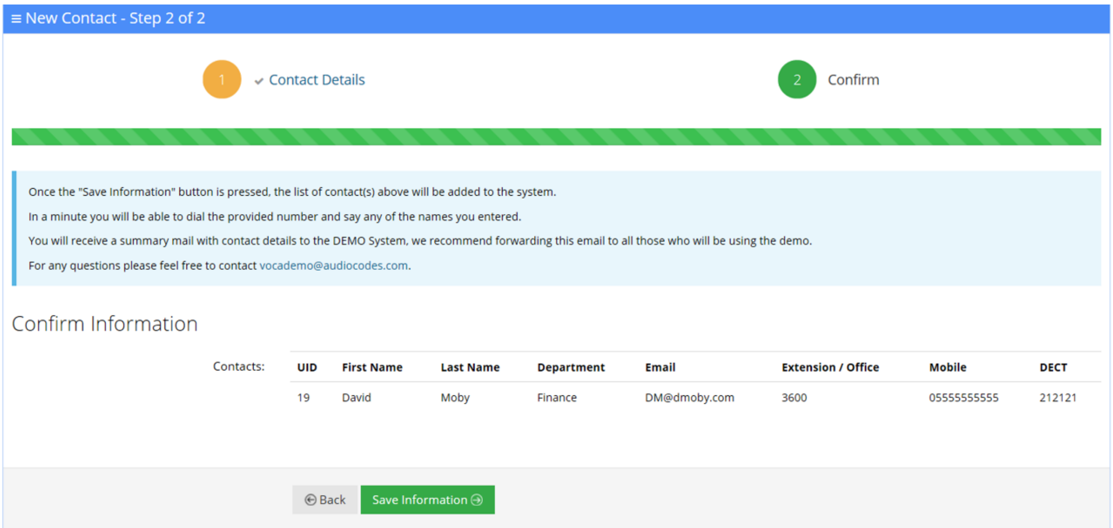


3. Under the Provide Contact Details group, enter the following:
   - UID
   - First Name
   - Last Name
   - Department
   - Email
   - Extension/Office
   - Mobile
   - DECT

> - DECT is only available if the Administrator has configured it for a specific customer/service.
> - Every contact must have a unique User ID (UID). This can either be a unique number or name, e.g., ABC123. The UID must also be unique in the system (e.g. not assigned in departments or Branches).

4. Click **Continue**.

Figure 3-3: Contact Information



5. Click **Save Information**.

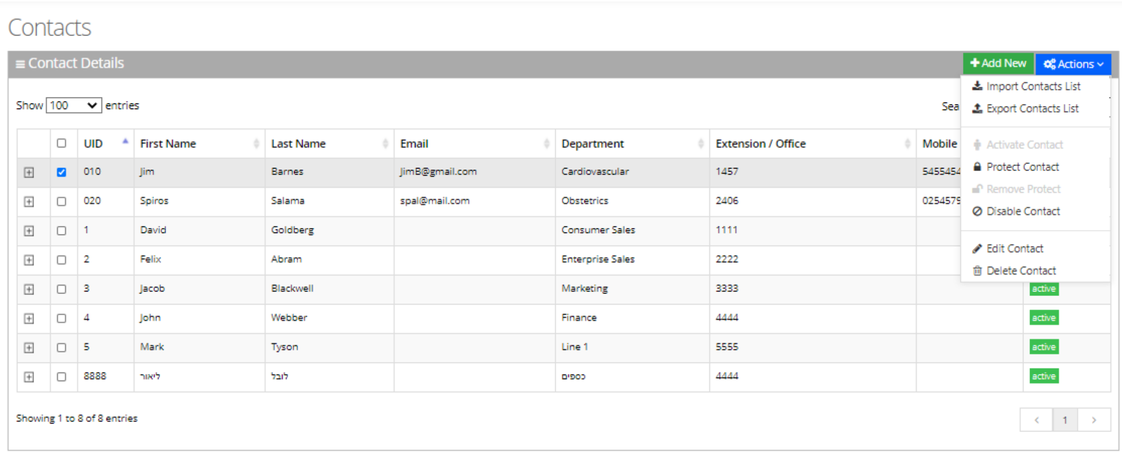
Editing a Contact

The procedure below describes how to edit a contact.

➢ To edit a contact:

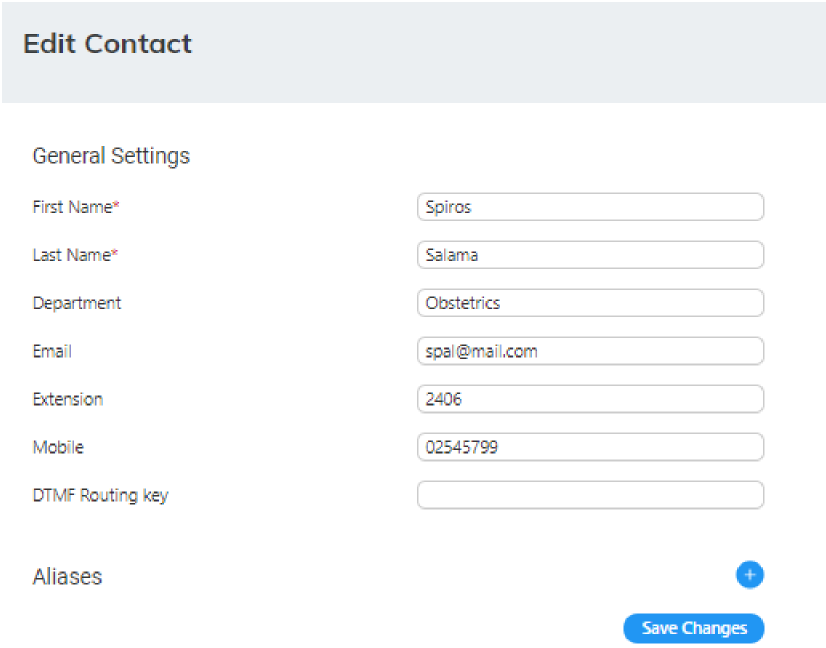
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to edit by selecting the **Contact** check box.

Figure 3-4: Editing a Contact



3. From the ‘Actions’ drop-down list, select **Edit Contact**; the Edit Contact screen appears:

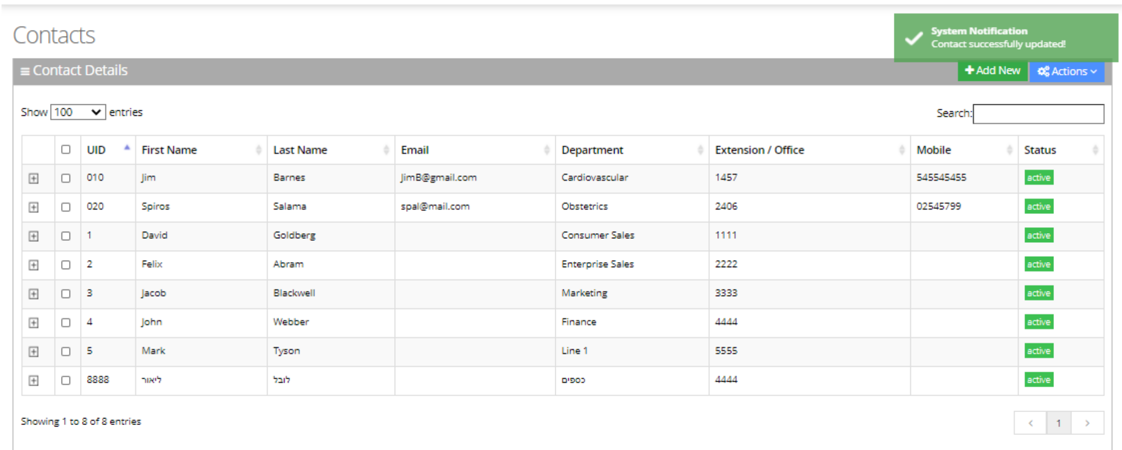
Figure 3-5: Edit Contact Step 1



In the 'DTMF Routing key' field, enter the DTMF routing key. This key is used to reach this contact when entering this DTMF code in the Speech menu (if **Transfer by DTMF routing key** is enabled in the menu). The key must be unique within the service.

4. Make your changes on the 'Edit Contact' screen, and then click **Save Changes**; the updated Contact details appear.

Figure 3-6: Edited Contact



Creating an Alias for a Contact

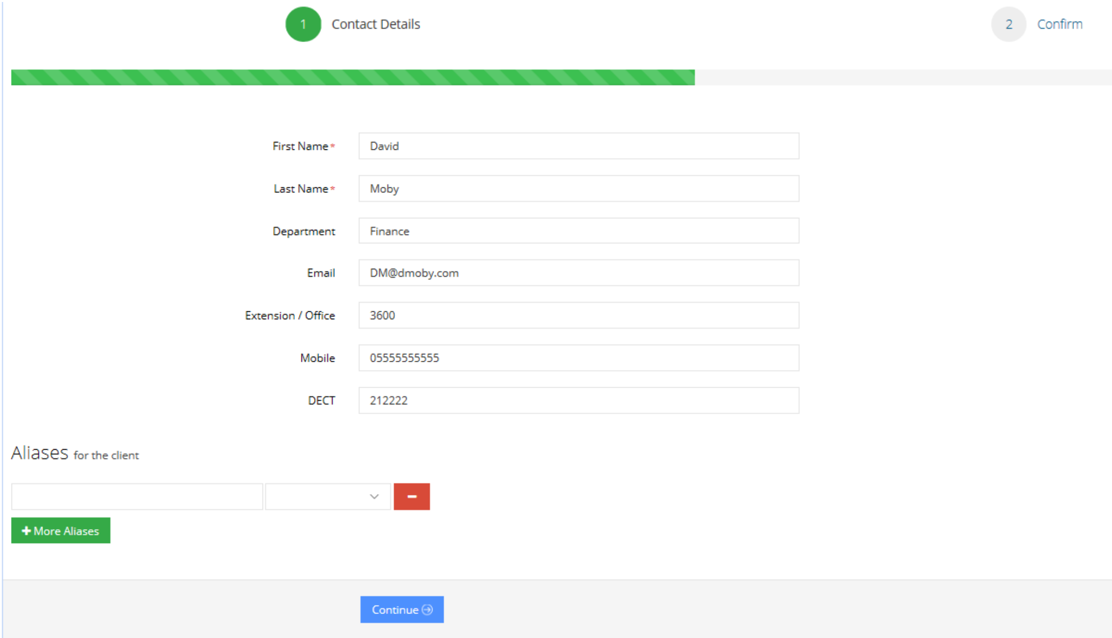
An alias is another name for a contact, known or more familiar under another specified name. You can create an alias for a specified contact.

➢ To create an alias for a contact:

1. Open the Edit Contact 1 of 2 screen (**Contacts** > **Contacts List**).

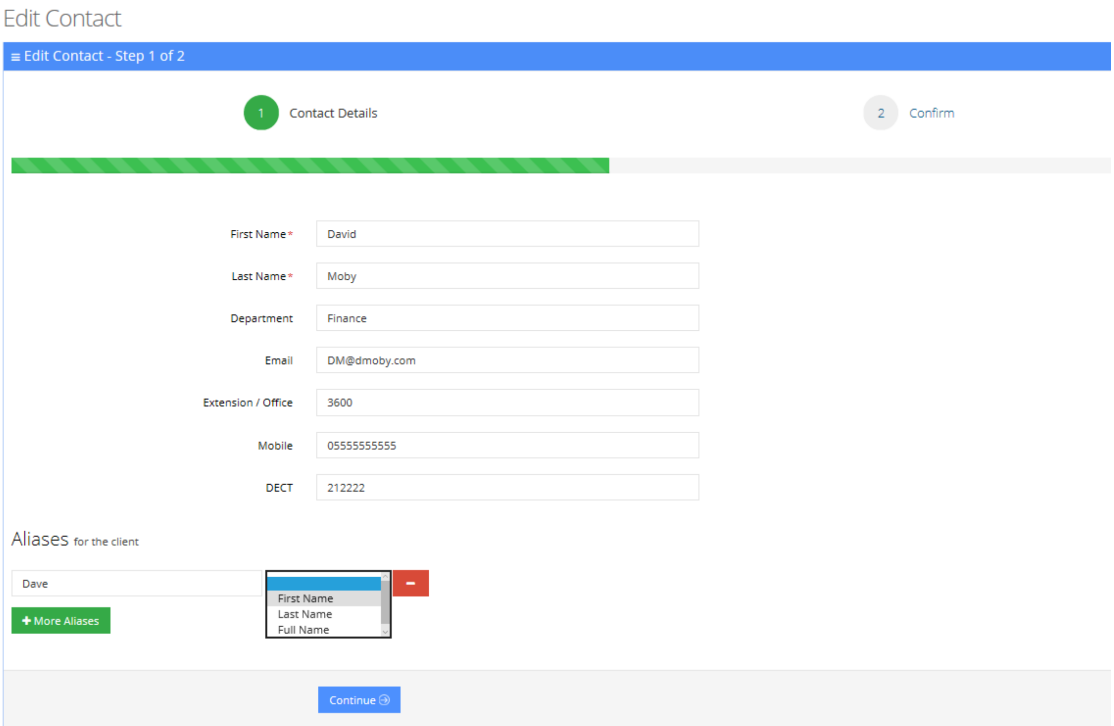
2. Select the contact you wish to edit by selecting the **Contact** check box.
3. From the 'Actions' drop-down list, select **Edit Contact**.
4. Under the **Alias** group, click **+ More Aliases**; the following screen example appears:

Figure 3-7: Adding a Contact Alias



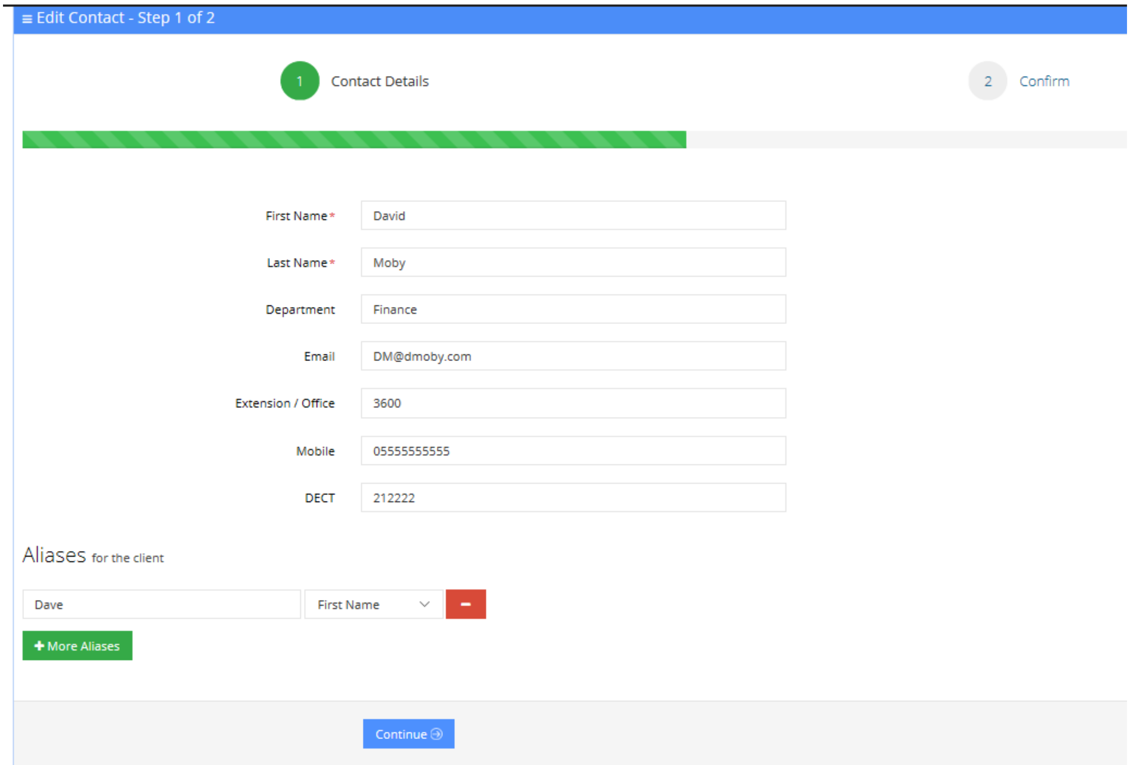
5. Enter an alias name in the alias field. e.g., "Dave".
6. From the Alias Contact drop-down list, select the description field, for example, First Name.

Figure 3-8: Adding a Contact Alias – First Name



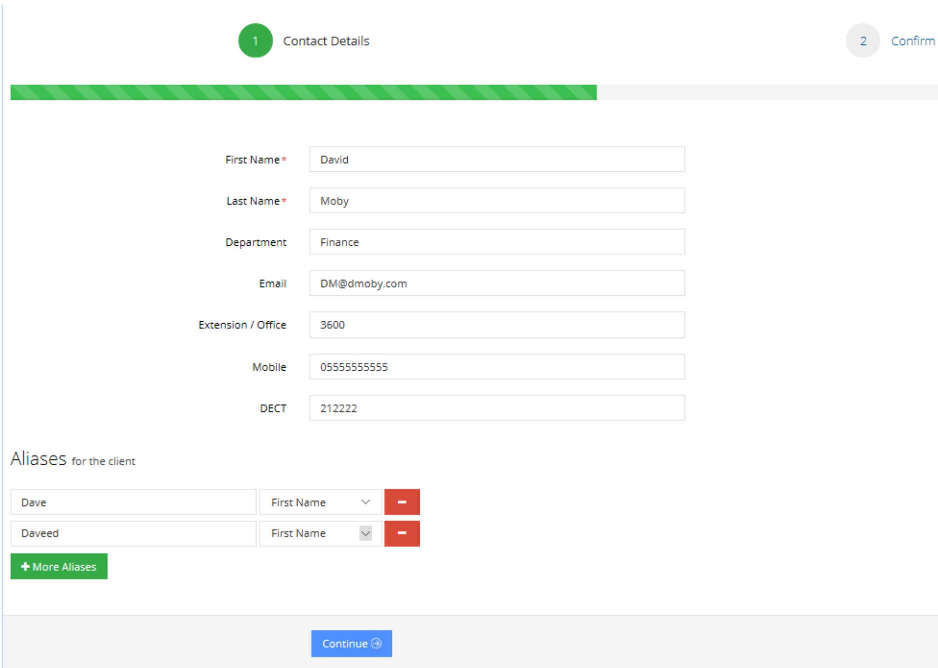
7. The following screen appears.

Figure 3-9: Adding a Contact Alias – More Aliases



8. Enter more aliases if necessary. In our example, "David Moby" has an alias first name of "Dave" and "Daveed". This means that if you are searching for "David Moby", you can also search for him as "Dave Moby" or "Daveed Moby".

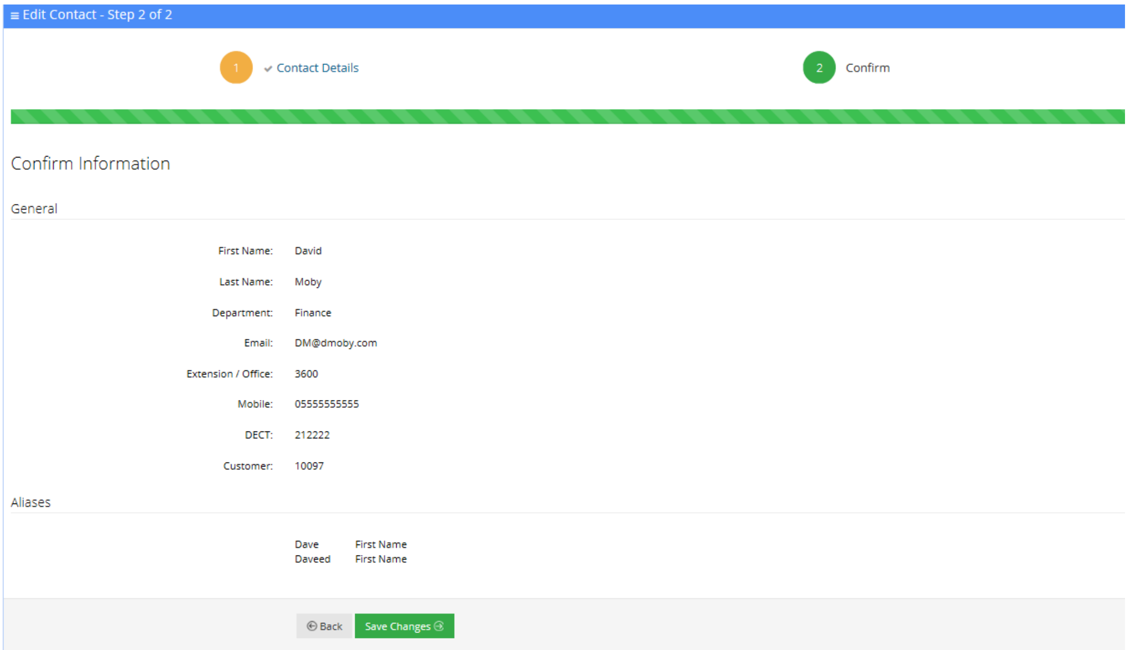
Figure 3-10: Adding a Contact Alias – More Aliases



You can remove an alias by clicking the red "-" icon.

9. Click **Continue**; the following screen appears.

Figure 3-11: Adding a Contact Alias – Save Changes



10. Click **Save Changes**.

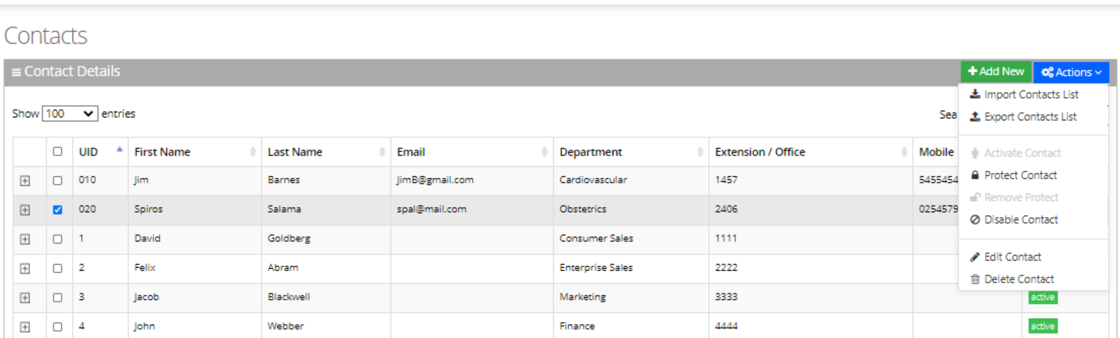
Deleting a Contact

The procedure below describes how to delete a contact.

➢ To delete a contact:

1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to delete by selecting the 'Contact' check box.
3. From the 'Actions' drop-down list, select **Delete Contact**.

Figure 3-12: Delete a Contact



4. The following message appears: "Are you sure you want to delete the selected contact(s)?"
5. Click **OK** to delete the selected contact.

Searching a Contact

The procedure below describes how to search for a contact.

➢ **To search for a contact:**

1. Open the Contacts menu (Contacts > <department Dictionary name>).
2. Click on the Contact List menu.
3. Enter the search criteria in the Search field; the searched data is displayed.

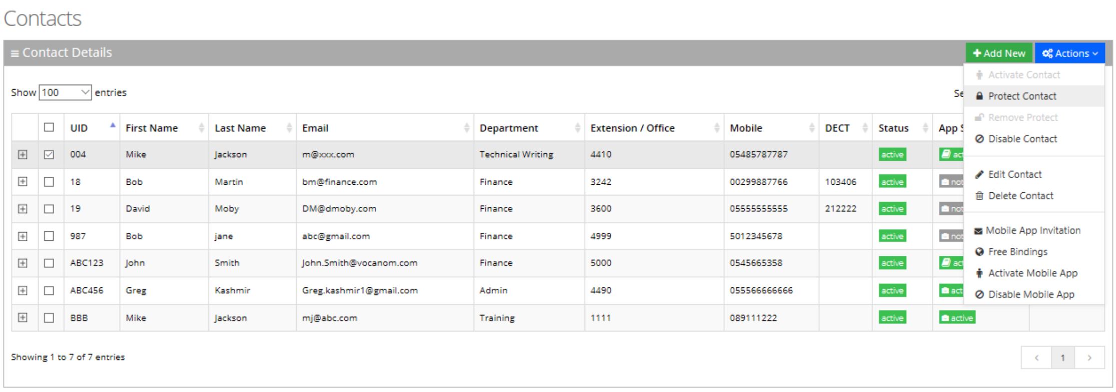
Protecting a Contact

In most cases the Contacts List is retrieved from an external source (e.g., Active Directory or a CSV file). Organization administrators have the option to change specific contact details and set the contact to Protect mode. By doing this, a re-synchronization of the Contacts List will not override the change.

➢ **To protect a contact:**

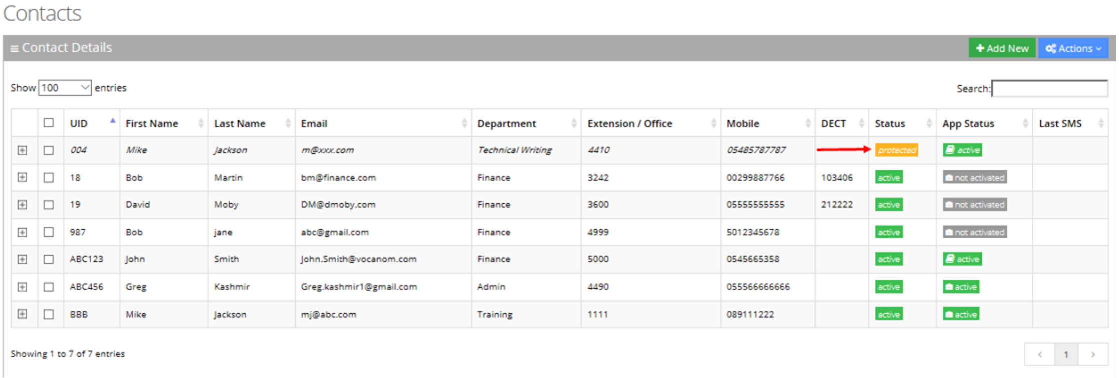
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to protect by selecting the 'Contact' check box.
3. From the 'Actions' drop-down list, choose **Protect Contact**; the following screen appears:

Figure 3-13: Protect a Contact



The selected contact appears with a status of "Protected".

Figure 3-14: Protected Contact



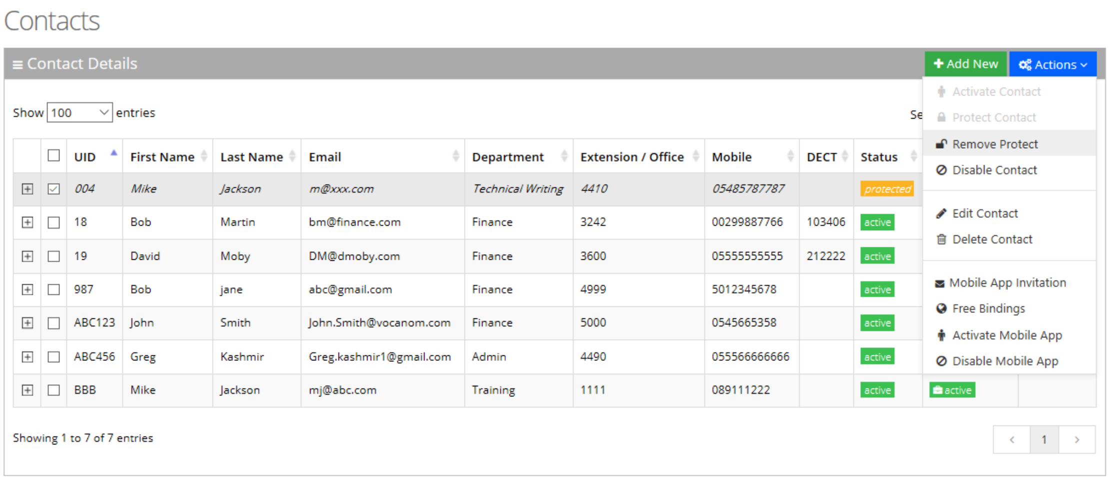
Removing Protection from a Contact

The procedure below describes how to remove protection from a contact.

➢ To remove protection from a contact:

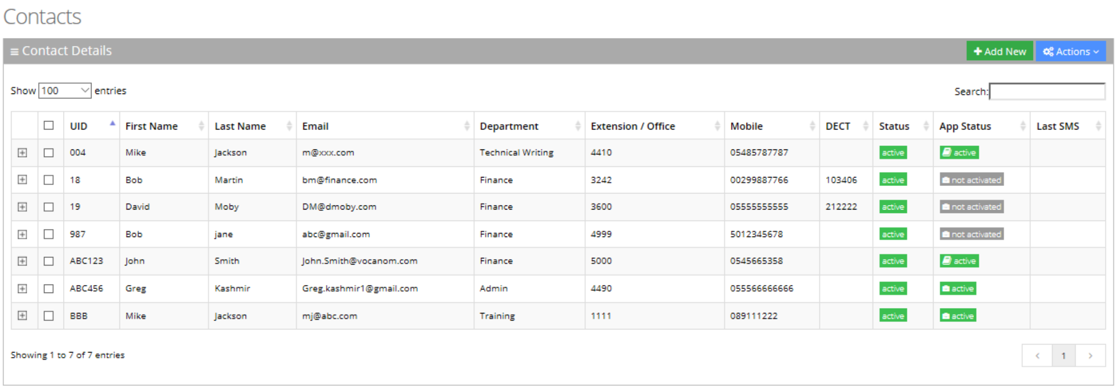
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the protected contact you wish to remove the "Protect" status, by selecting the 'Contact' check box.
3. From the ‘Actions’ drop-down list, select **Remove Protect**; the following screen appears:

Figure 3-15: Remove Protected Contact



4. The "protect" status is removed as shown in the figure below.

Figure 3-16: Removed Protected Contact



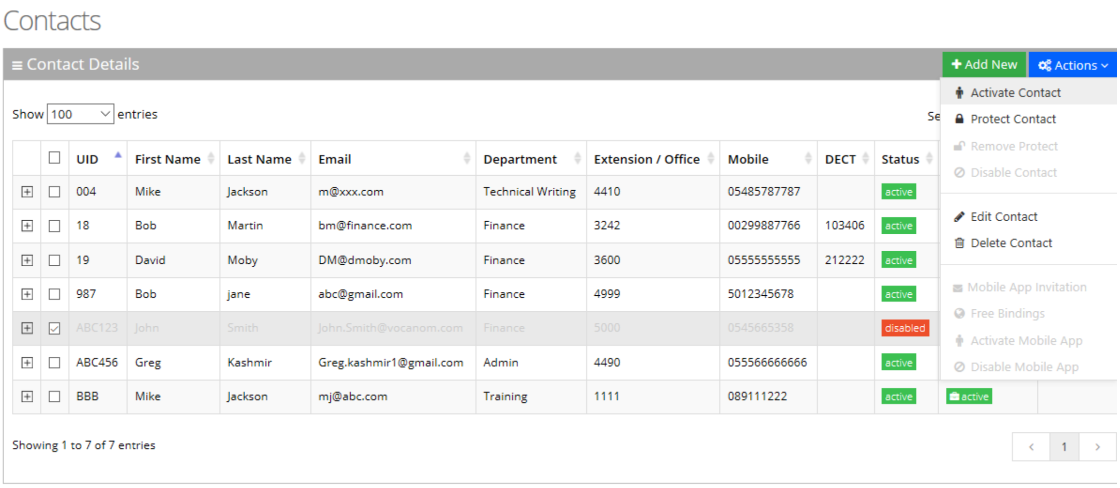
Activating a Contact

When a contact is created, it is activated (enabled) by default. The procedure below describes how to activate a contact, in case it was disabled.

➢ To activate a contact:

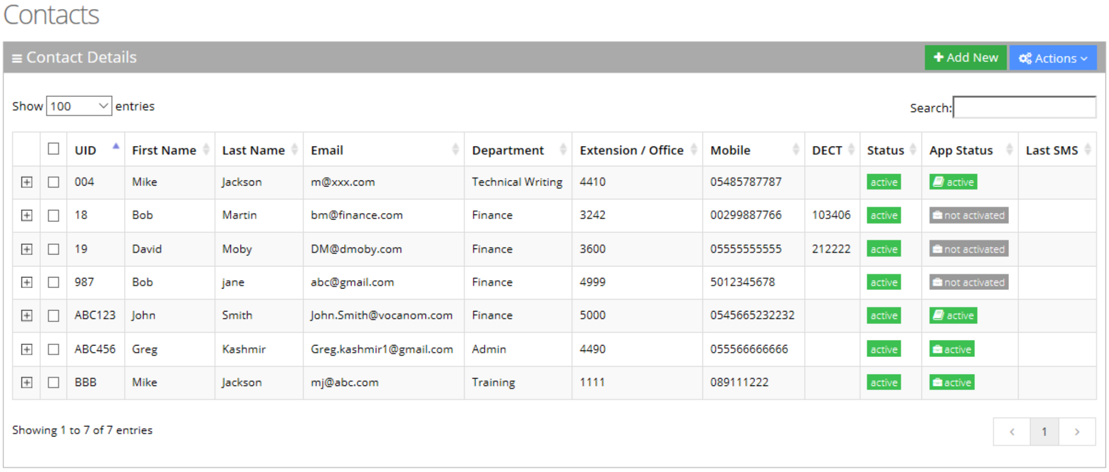
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to activate by selecting the 'Contact' check box.

Figure 3-17: Activating a Contact



3. From the ‘Actions’ drop-down list, select **Activate Contact**; the following screen appears:

Figure 3-18: Activated Contact



Disabling a Contact

When you disable a contact, the system removes the contact from the Contact Detection List. When a "disabled" contact calls the system, it will be recognized as non-employee caller.

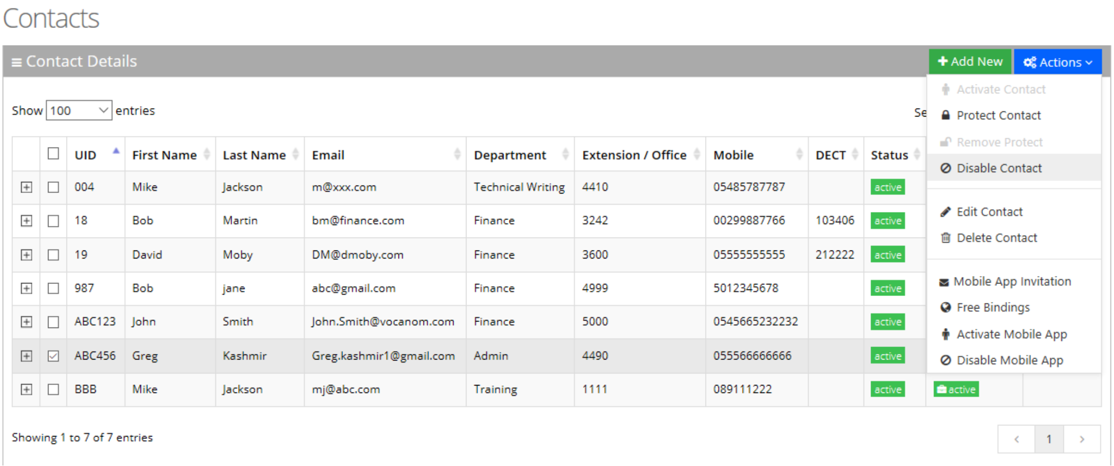
By default, the Auto Sync Contact tool moves the users to a Disabled state. It will not delete them in case they exist on the system Contact List but not on the LDAP/file.

The procedure below describes how to disable a contact.

➢ To disable a contact:

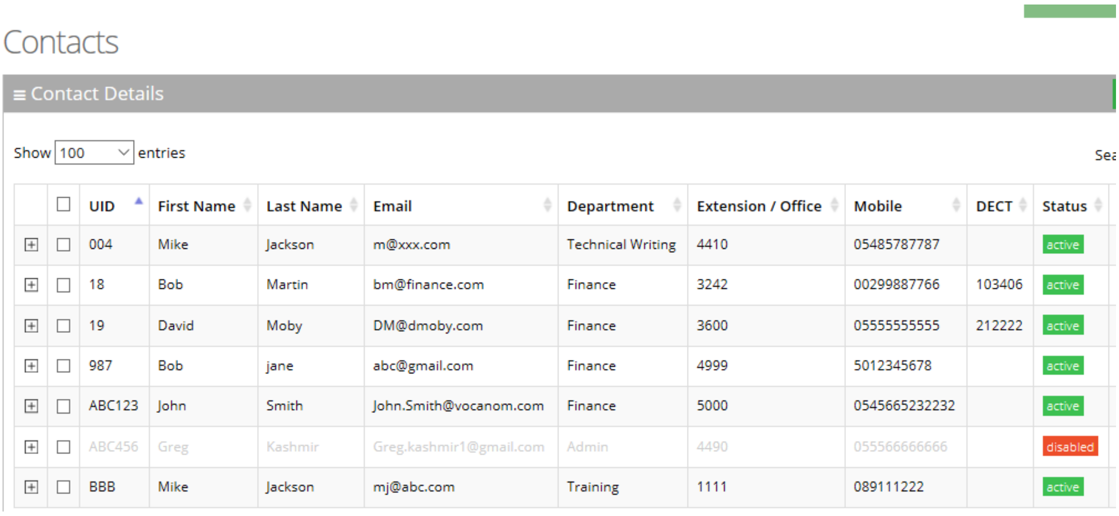
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to disable by selecting the 'Contact' check box.
3. From the 'Actions' drop-down list, select **Disable Contacts**; the following screen appears:

Figure 3-19: Disabling a Contact



4. The status is set to "disabled" as shown in the figure below:

Figure 3-20: Disabled Contact


Contacts

≡ Contact Details

Show 100 entries Sea

		UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status
⊞	☐	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active
⊞	☐	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active
⊞	☐	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active
⊞	☐	987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active
⊞	☐	ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665232232		active
⊞	☐	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		disabled
⊞	☐	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active

Activating a Contact to use the VocaNOM Mobile App

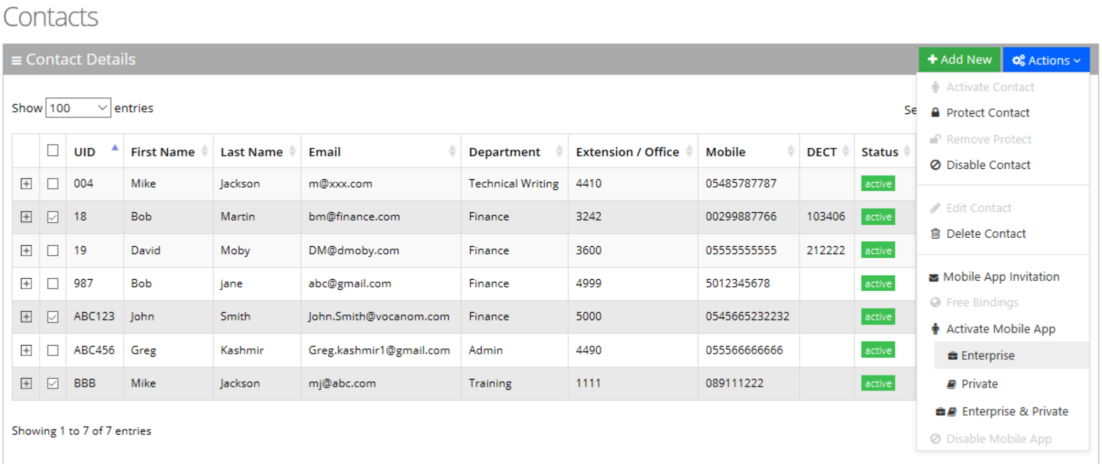
The procedure below describes how to activate a contact to use the VocaNOM Mobile App. The Activate Mobile App menu option activates users for the mobile application. Note the 'App Status' column in the Contacts List. Once activated, organization administrators can send mobile App invitations to users using SMS or email.

- The VocaNOM Mobile App will be only be available once a license has been obtained.
- The VocaNOM Mobile App is only supported on the Cloud installation and not On-premises.

➢ To activate a Contact to use the VocaNOM Mobile App:

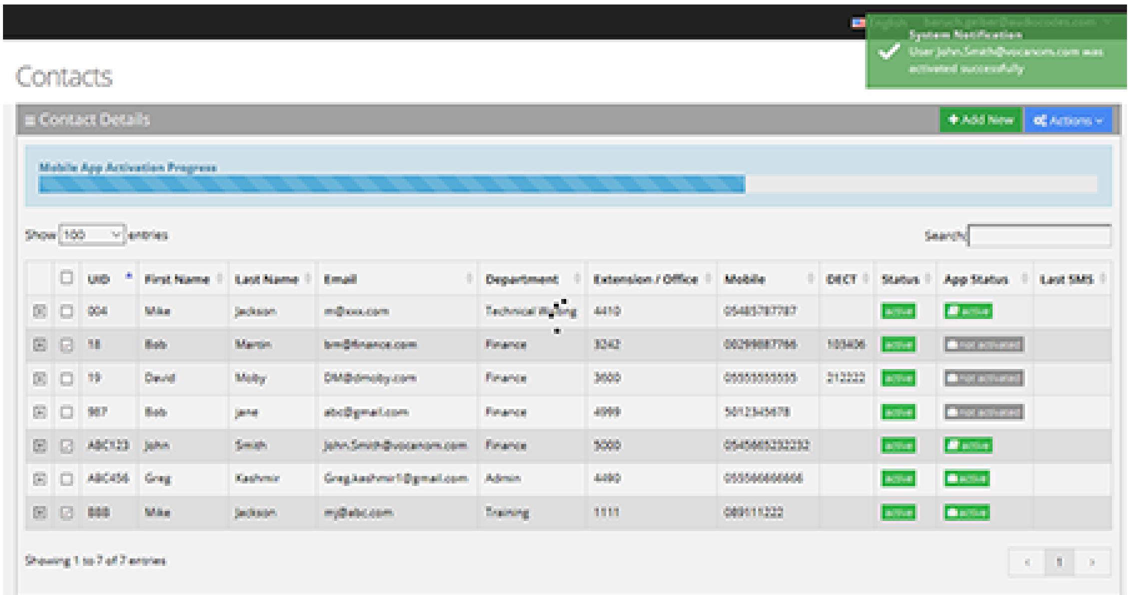
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to activate by selecting the ' Contact' check box.
3. From the ‘Actions’ drop-down list, select Activate Mobile App; the following screen appears:

Figure 3-21: Activate Contact – Mobile App



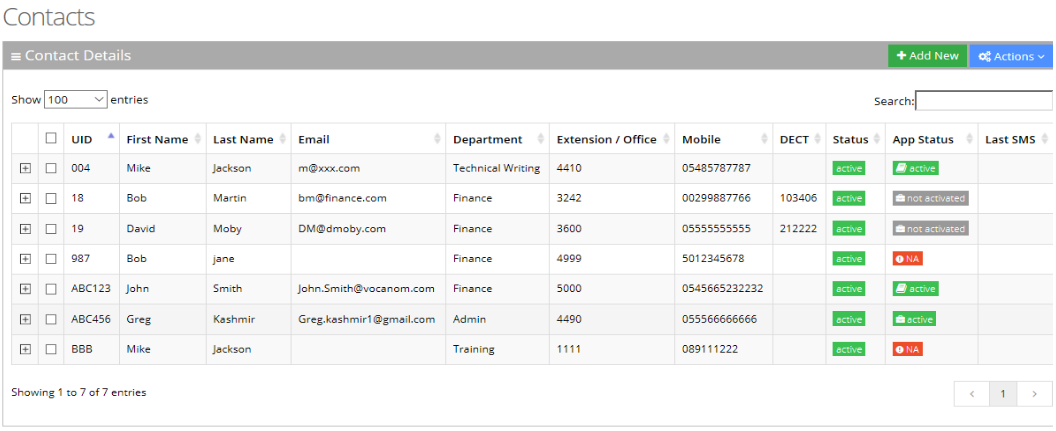
4. There are three options you can select from:
   - **Enterprise:** This activates the VocaNOM Mobile App for the whole enterprise. A small 'suitcase' icon appears under the Activate Mobile App menu heading.
   - **Private:** This activates the VocaNOM Mobile App for private contacts only. A small 'book' icon appears under the Activate Mobile App menu heading.
   - **Enterprise & Private:** This activates the VocaNOM Mobile App for the whole enterprise and private contacts. A small 'suitcase' and 'book' icon appear under the Activate Mobile App menu heading.
5. Once you have selected the appropriate option, a message appears in the upper-right part of screen that the user has been activated successfully. Also, in the App Status column, an 'Active' message appears in green along with a suitable icon for each option displayed.

Figure 3-22: System Notification



A contact without an email address will not be able to use the Mobile App. Therefore, its App Status will be NA.

Figure 3-23: Contacts with No Email Address – NA



UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active	
18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not activated	
987	Bob	jane		Finance	4999	5012345678		active	NA	
ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665232232		active	active	
ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	active	
BBB	Mike	Jackson		Training	1111	089111222		active	NA	

Importing/Exporting Contact List

The procedure below describes how to import and export CSV and Excel files containing Contact lists. When using CSV files, we recommend you use Notepad++ and save files in UTF-8 encoding format.

Figure 3-24: Contact Details

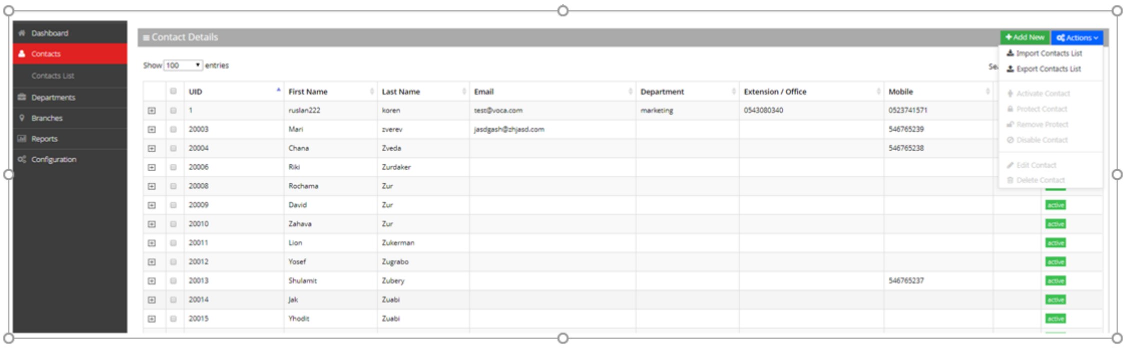
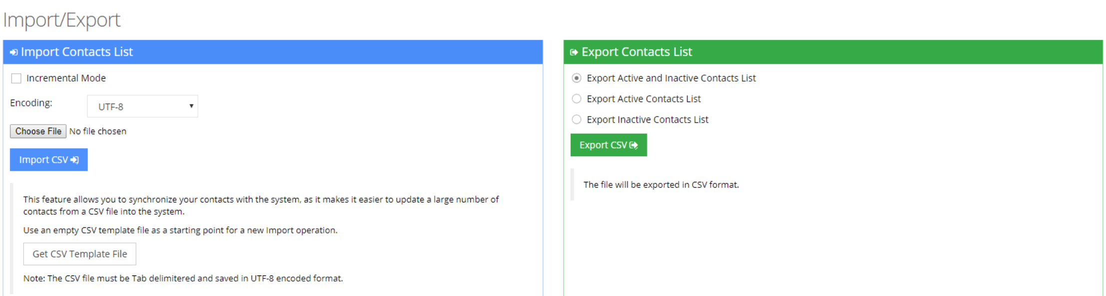


Figure 3-25: Import/Export Contact List



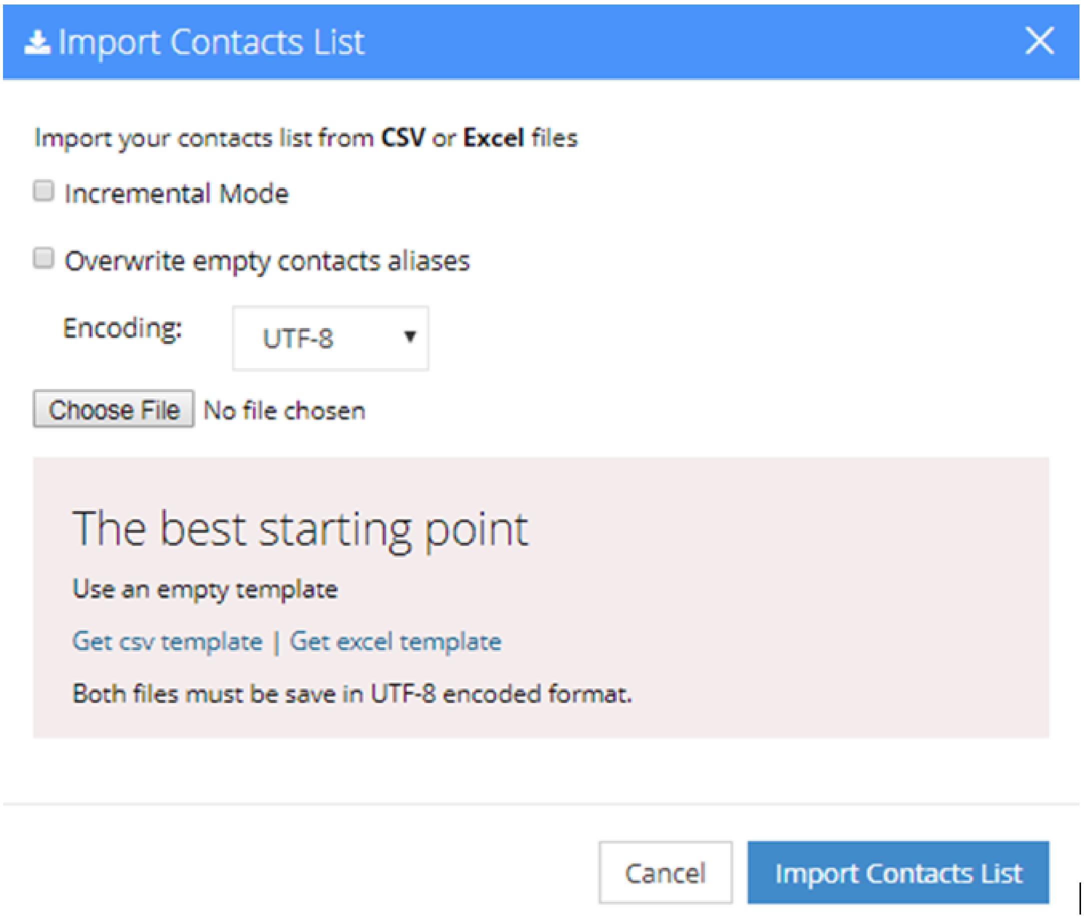
Importing Contact Information

The procedure below describes how to import Contact information.

➢ **To import contact information from a CSV file:**

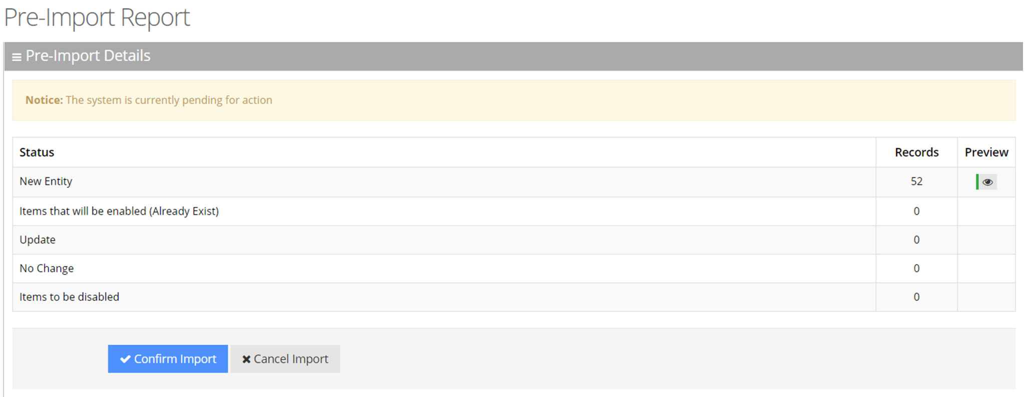
1. From the Actions drop-down list, on the Contact Details screen, click **Import Contacts List**.

Figure 3-26: Import Contacts List



2. If you select the 'Incremental Mode' check box, only the records that you are importing will be active in your Contacts List. All pre-existing records will be disabled.
3. If you select the 'Overwrite empty contacts aliases' check box, all empty contacts aliases in the imported file are overwritten.
4. From the 'Encoding' drop-down list, select the **Encoding type**. The recommended value is **UTF-8**.
5. Click **Choose File** and select the file to be imported.
6. Select the CSV or Excel template.
7. Click **Import Contacts** List.

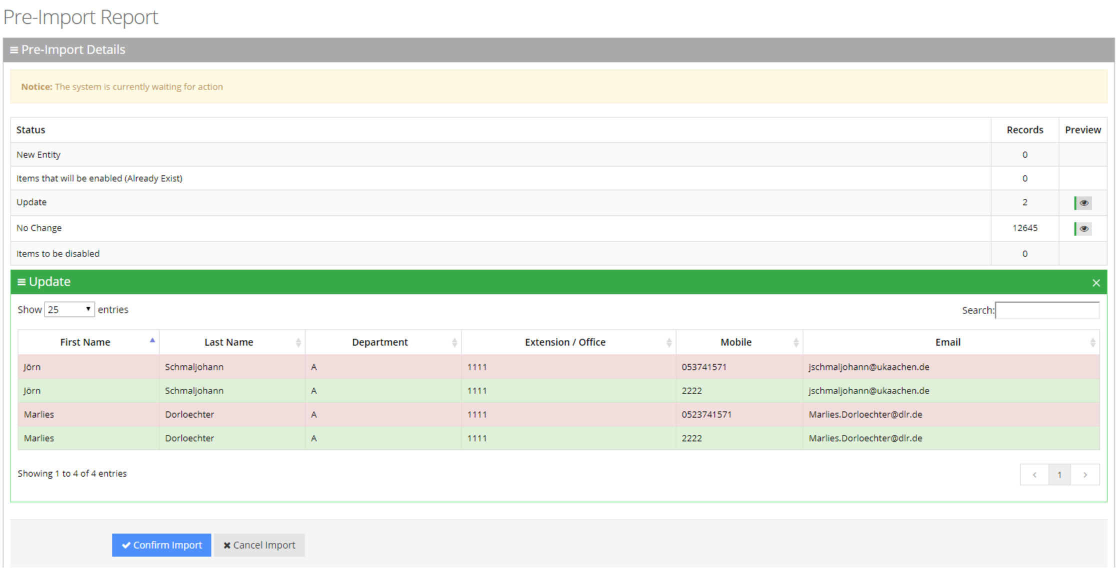
Figure 3-27: Pre-Import Report



This report lists the status of the contacts to be imported. In the example above, 52 new contacts are ready to be imported. Clicking the **Preview** icon, displays these new contacts before they are imported.

If there is an update to an existing contact, click the **Preview** icon. The contact (before the update) will appear with a pink background, while the updated contact will appear with a green background.

Figure 3-28: Update Pre-Import Report

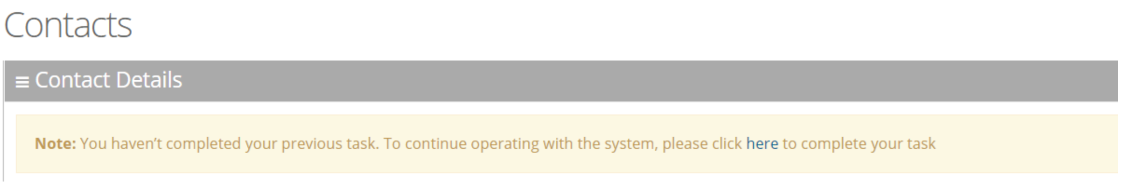


The same behavior applies for Contacts that have been disabled.

8. Click **Confirm Import** to import the contacts. If you wish to cancel the import process, click Cancel Import.

If you do not click **Confirm Import** or **Cancel Import**, or you switch to another tab, the actual import will be pending and all contacts will be disabled. The following message appears:

Figure 3-29: Uncompleted Contacts Import



9. You can return to the **Confirm Import** or **Cancel Import** processes by clicking on the here link.

10. The CSV file to be imported should contain the following:

    - UID (mandatory) - an employee ID or any unique number, name or both.
    - First name
    - Last name
    - Extension number
    - Mobile number
    - Department
    - Email
    - First Name Aliases separated by ";"
    - Last Name Aliases separated by ";"
    - Full Name Aliases separated by ";"

- It is highly recommended that the CSV file will be saved in UTF-8 encoding format (Unicode Text). Use Notepad++ to view CSV files.
- You can import a new contact with an existing UID in the same tab. For example, you can import a new contact from the Contacts > Import/Export. The imported contact overwrites the existing contact with the same UID. However, if you import a new department with a UID that is already in use by an existing contact or branch, an error appears with the following message: "Upload has failed. One or more of the UIDs already exist in contacts or branches list! [UID number]".

The Excel file can be imported according to the following layout.

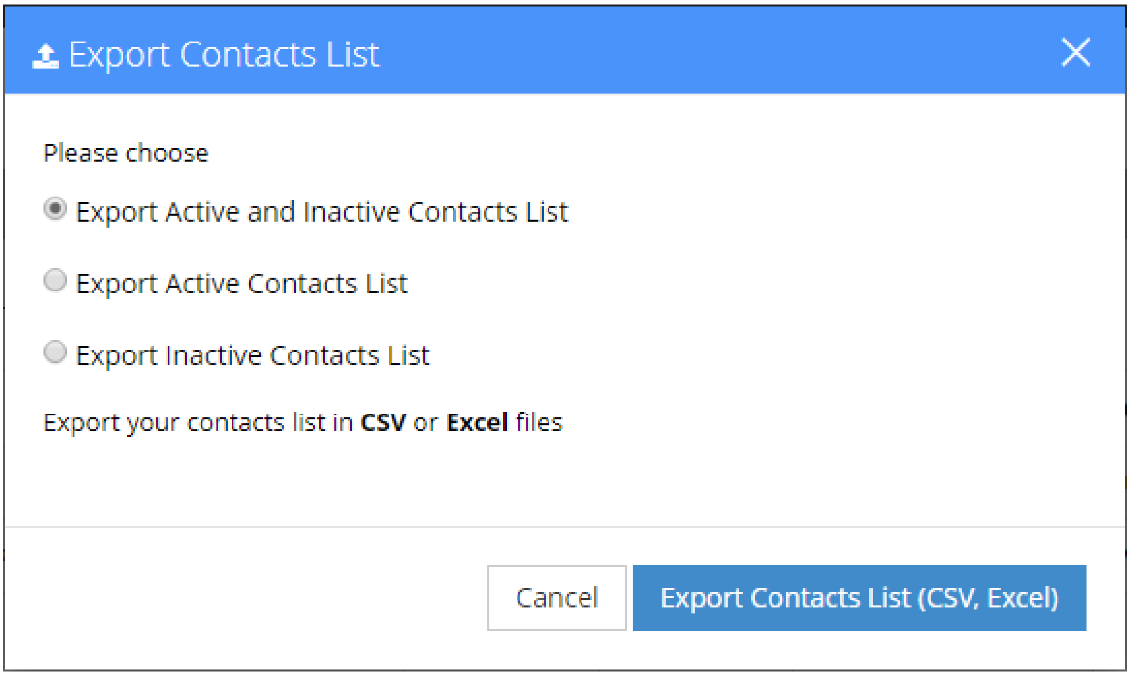
Exporting Contact Information

The procedure below describes how to export contact information.

➢ **To export contact information:**

1. From the 'Actions' drop-down list, on the Contact Details screen, click **Export Contacts List**.

Figure 3-30: Export Contacts List



2. Select the type of Contact List to be exported – Excel or CSV.
3. Click **Export Contacts List**.

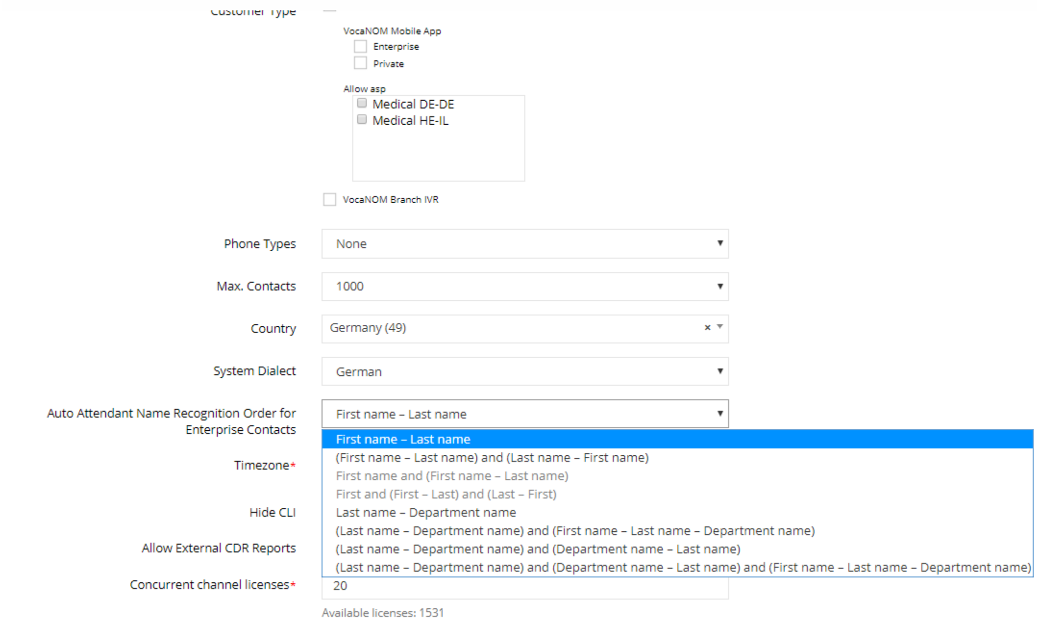
Freeing Bindings

When an Application User activates the VocaNOM application on a mobile device, a unique binding is set on the server for that device. If more than one device is used, more than one binding will be created. If the binding limit is reached (as defined for the customer), the new binding will be rejected for the new device and the user is unable to use the app on the new device. The Free Bindings menu option clears all bindings on the server for the selected contact, enabling a fresh start.

4 Managing Contacts Departments

> ⚠ This sub-section is applicable only if the language selected is "German", and if the tenant is configured to "Last name – Department name".

Figure 4-1: Tenant Configuration Example



The Contacts Departments page allows you greater control in managing aliases for Contacts Departments. Aliases are useful especially when an exact name of a department is not known by the caller. For instance, when calling a 'Sales' department in an organization, there may be a number of different sales departments, for example, "Consumer Sales" and "Enterprise Sales". Voca gives the caller the choice of which Sales department the call should be directed to.

The Contacts Departments page retrieves the list of departments from the Contact List.

Adding an Alias

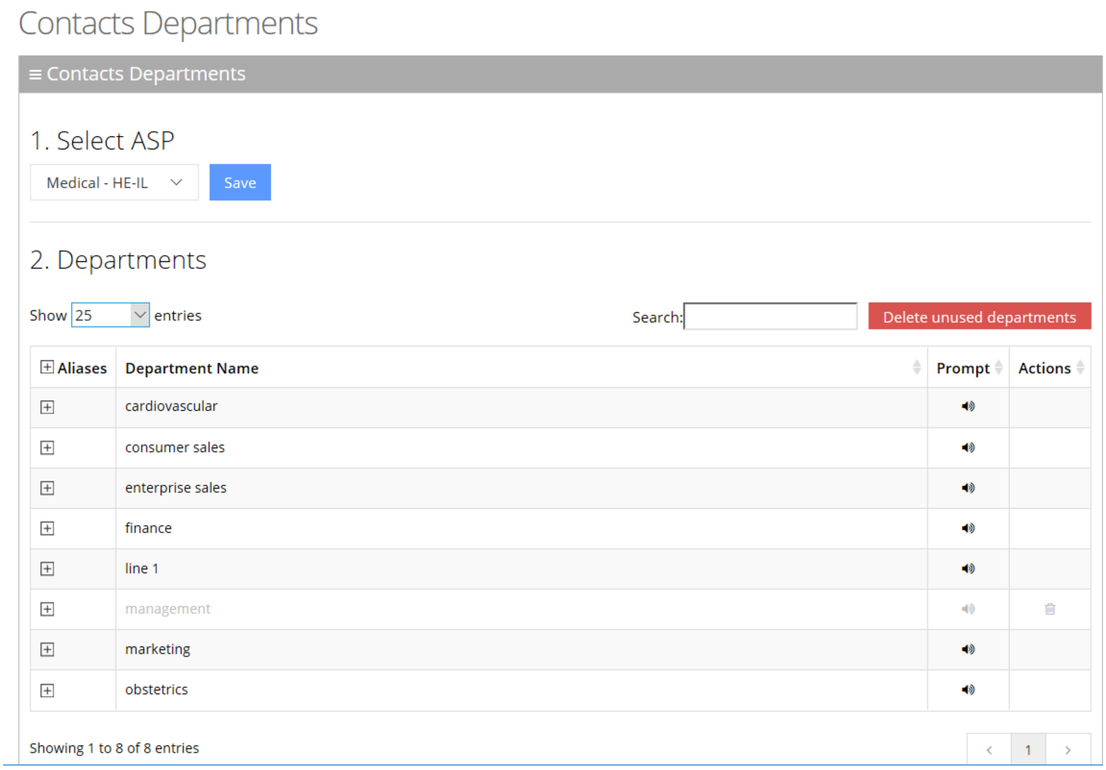
The procedure below describes how to add a new Contacts Departments alias.

➢ To add a Contacts Departments alias:

1. Open the Contacts Departments page (**Contacts** > **Contacts Departments**).

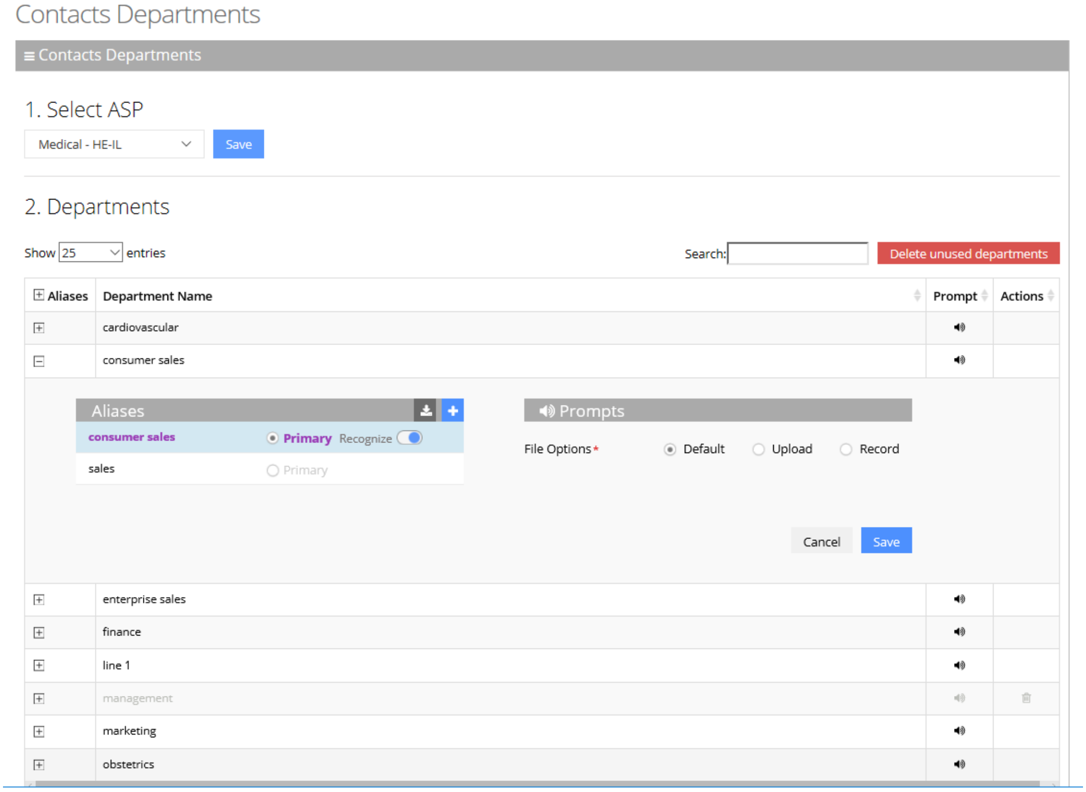
> ⚠ The first time you access this screen, Voca forces you to choose an ASP, before saving the values on the screen.

Figure 4-2: Contacts Departments



2. Select a Department Name by selecting the 'Aliases' check box on the line of the department name you wish to select.
3. Click  .
4. In the blank text box that appears, enter the name of the alias. In our example, we have used 'Sales'.

Figure 4-3: Contacts Departments – Add Alias



5. Click **Save**.

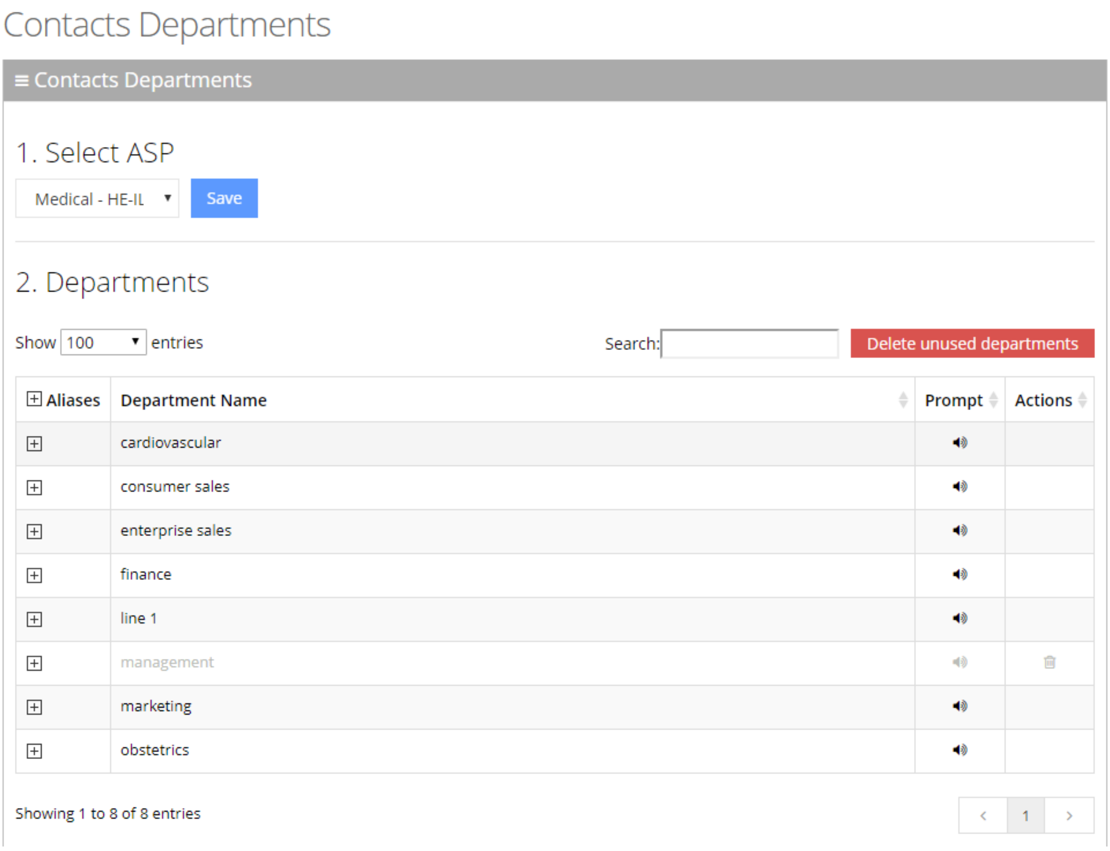
Editing an Alias

The procedure below describes how to edit Contacts Departments aliases.

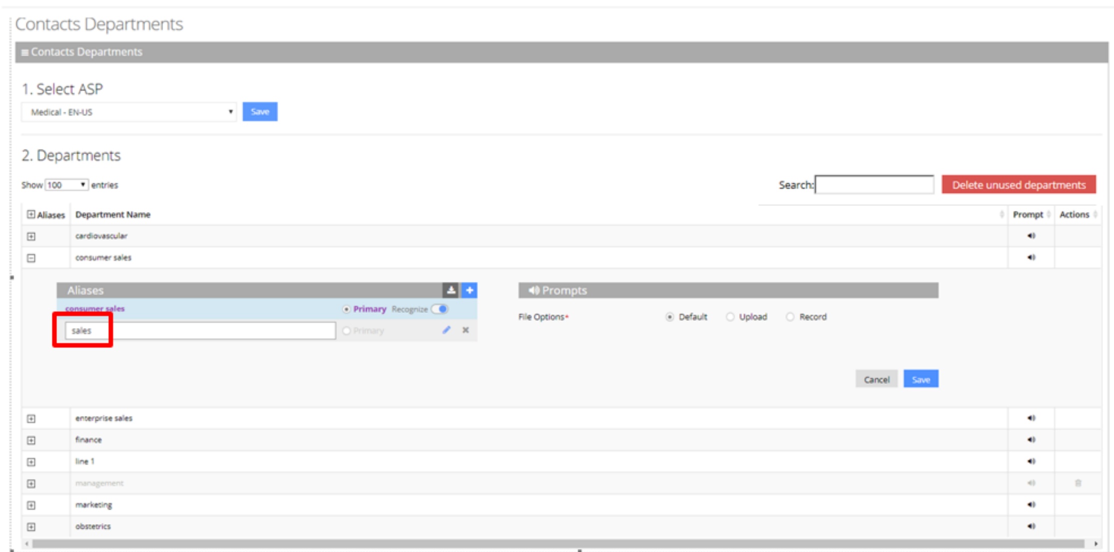
➢ **To edit Contacts Departments aliases:**

1. Open the Contacts Departments page (**Contacts** > **Contacts Departments**).

Figure 4-4: Contacts Departments

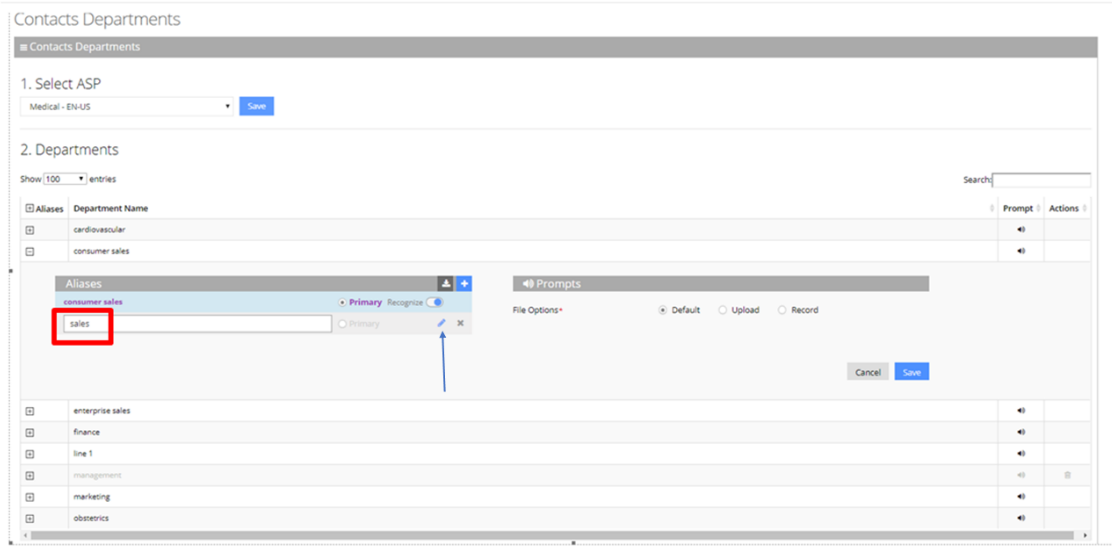


2. Select a Department Name by selecting the 'Aliases' check box on the line of the department name you wish to select.



3. Place your cursor over the alias that you wish to edit, and then click the  icon.

Figure 4-5: Contacts Departments – Editing Alias



4. Edit the alias as needed, and then press **Enter**. In our example 'Sales 1' was changed to 'Sales'.
5. Click **Save**.

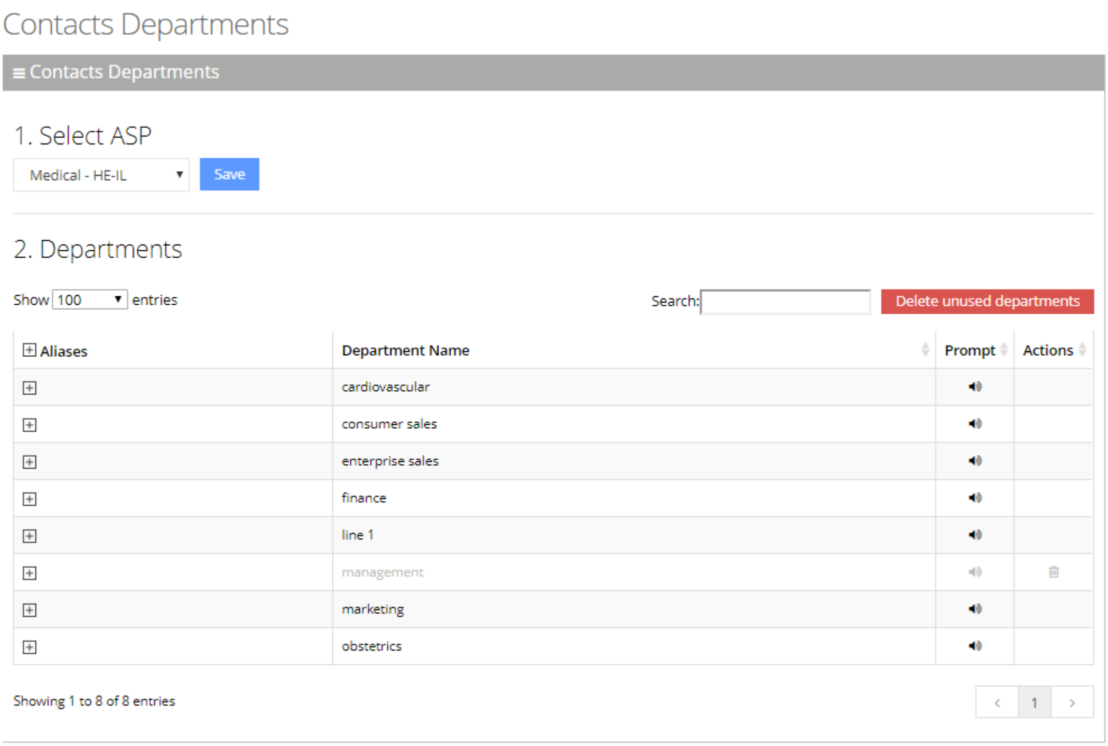
Deleting an Alias

The procedure below describes how to delete a Contacts Departments alias.

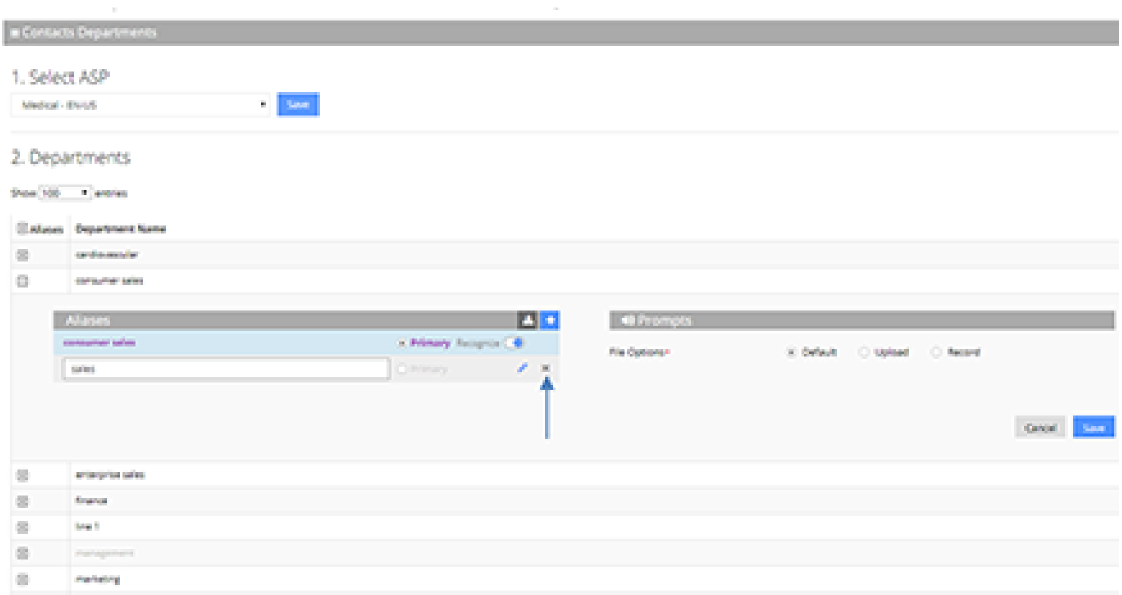
➢ **To delete a Contacts Departments alias:**

1. Open the Contacts Departments page (**Contacts** > **Contacts Departments**).

Figure 4-6: Contacts Departments - Deleting an Alias



2. Select a Department Name by selecting the 'Aliases' check box on the line of the department name you wish to select.
3. Place your cursor over the alias that you wish to delete, and then click the x icon. The alias is deleted.



4. Click **Save**.

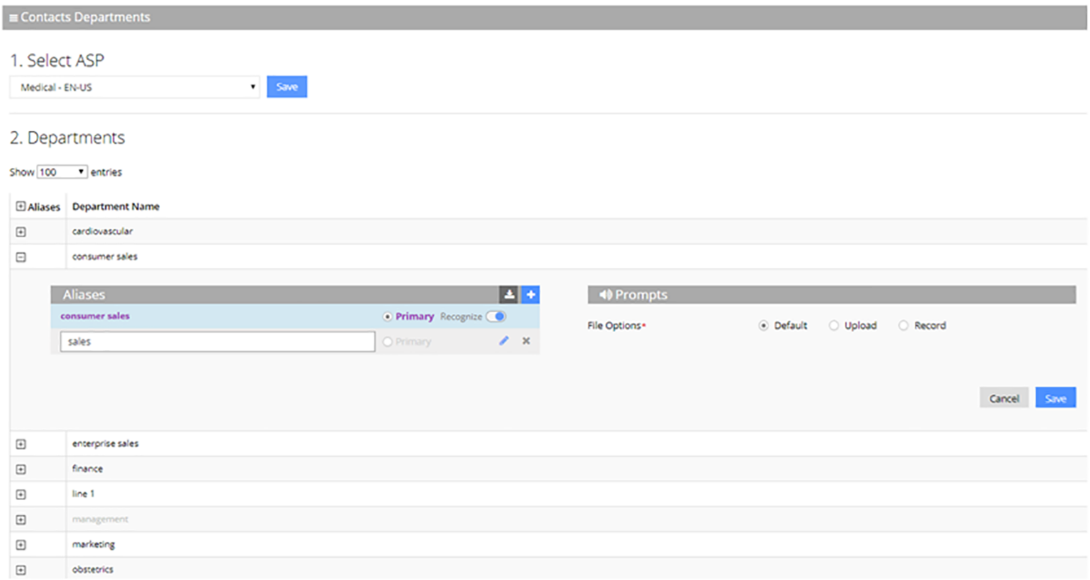
Removing a Department Name from the Recognition List

Sometimes you may need to remove a Department Name from the Recognition List, either because it is inaccurate or unpronounceable.

➢ **To remove a Department Name from the Recognition List:**

1. Open the Contacts Departments page (**Contacts** > **Contacts Departments**).
2. Select the Department Name containing the alias to be hidden by clicking on the line of the department name.

Figure 4-7: Contacts Departments – Removing a Department Name



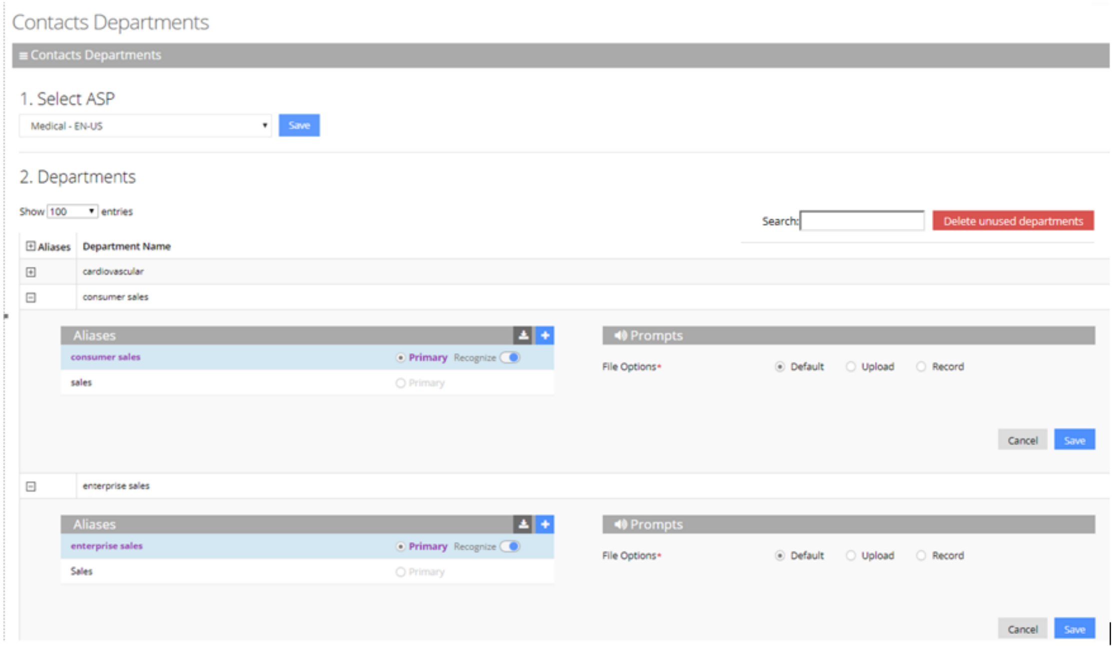
3. Drag the **Recognize** toggle to the left, so that this alias is de-selected and is not recognized by Voca. In our example, 'sales' has been selected to be the primary alias.
4. Click **Save**.

Setting the Primary Alias

The **Primary** radio-button determines which department is announced first when transferring the call or in a dis-ambiguation scenario.

For instance, when wanting to contact "Smith", who is employed in the Sales department, the voice announcement is "transferring the call to Smith...Consumer Sales", since the Consumer Sales department was selected as the Primary.

Figure 4-8: Primary Example



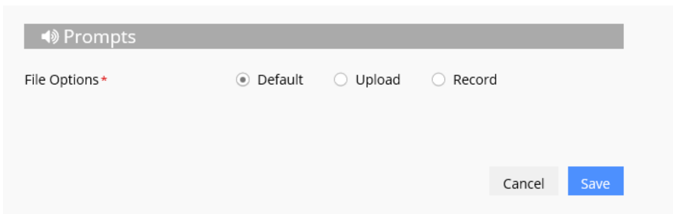
Additionally, if there are two people with the same last name and department name, e.g., "Smith" in the Sales department, the voice announcement asks "Do you want John Smith in the **Enterprise Sales** or John Smith in the **Consumer Sales** department". Both departments are marked as **Primary**.

Using Prompts for an Alias

If you do not want to use the Primary voice announcements, you can use you own Prompts. The procedure below describes how to configure the Department Contacts audio prompt for the Voca service. You can use an existing default prompt (Primary), upload a prompt or record a new prompt.

- An alias can be configured as a Primary voice announcement.
- If the same alias is used in more than one department, it cannot be set as a Primary voice announcement.

Figure 4-9: Prompts

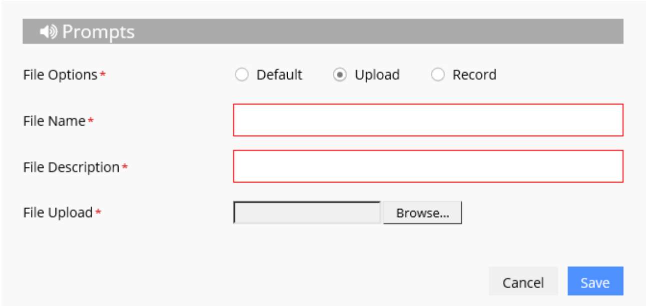


If you wish to use the existing prompt configured under the Alias, click the Default option, and then click Save.

➢ To upload a prompt:

1. Click the **Upload** option.

Figure 4-10: Upload Prompt



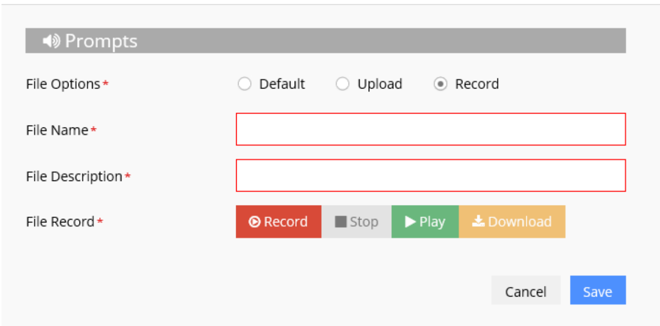
2. In the ‘File Name’ field, enter the audio file name.
3. In the ‘File Description’ field, enter a description of the prompt.
4. Click **Browse** to locate the audio file to be uploaded.
5. Click **Save** to complete the upload process.

> ⚠ The audio file must be in the following format - .wav file, with 16 Bit Resolution, mono, 8000Hz.

➢ To record a prompt:

1. Click **Record**, and then begin recording your prompt.

Figure 4-11: Record New Prompt Details



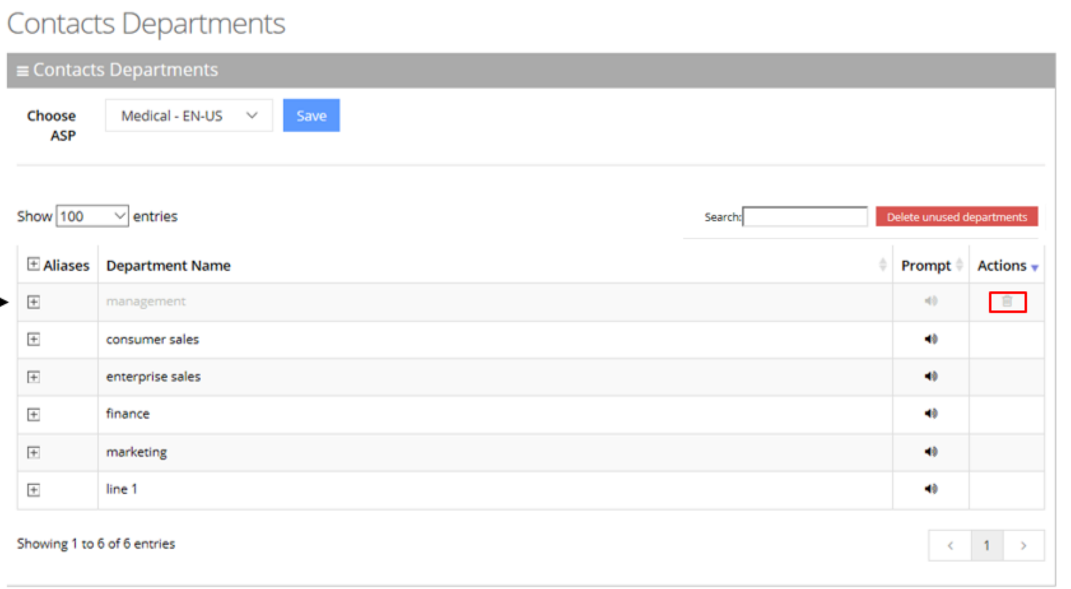
2. When finished recording, click **Stop**.
3. To replay the recent recording, click **Play**.
4. To save a copy of the recorded audio file, click **Download**.
5. Click **Save** to complete the recording process.

Deleting a Department with No Contacts

In a situation where a department has no contacts (for example, the contacts may have left or may have been transferred to another department), it appears faded on the Contacts

Departments page, with a Trash icon appearing on the far-right of the page. In the example below, the "management" department appears faded.

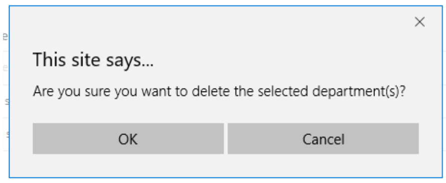
Figure 4-12: Deleting Department with No Contacts



➢ To delete the department with no contacts:

1. Open the Contacts Departments menu (**Contacts** > **Contacts Departments**).
2. Place the cursor on the department to be deleted.
3. Click the Trash icon; the following message appears:

Figure 4-13: Deleting Department



4. Click **OK** to delete the department.

Importing a Package

This feature allows you to import specific departments and aliases that are part of the pre-defined packages.

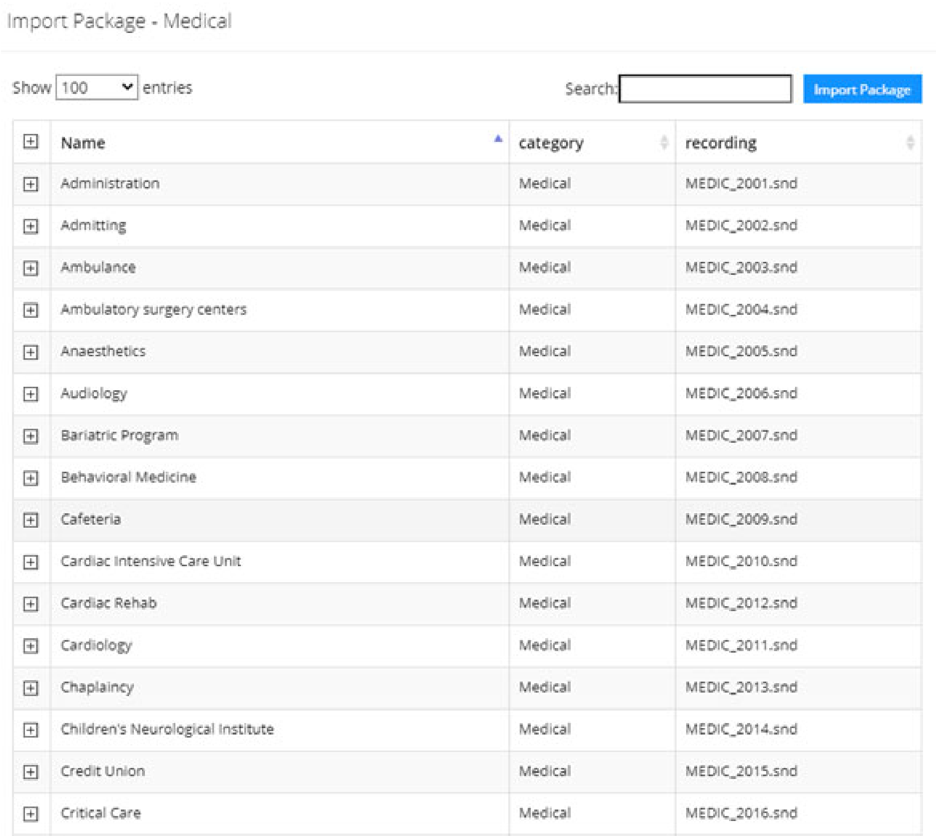
> This feature is only applicable if the ASP has been set to "Medical", on the Contacts Departments page.

➢ To import departments and their related aliases from the "Medical" package:

1. Open the Contacts Departments menu (**Contacts** > **Contacts Departments**).

2. Ensure that ASP has been set to "Medical".
3. Select the Department Name you wish to import to. In the example below, 'Obstetrics' has been selected.
4. Click the **Import Package** icon.
5. The Import Package page appears.

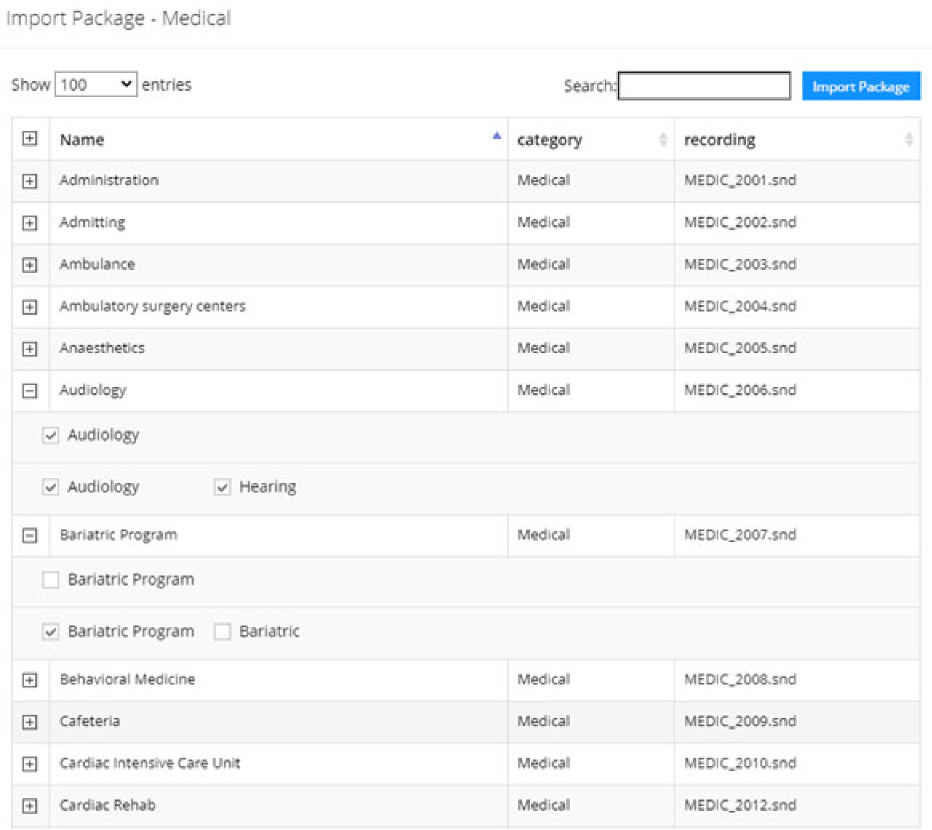
Figure 4-14: Importing Package



Name	category	recording
Administration	Medical	MEDIC_2001.snd
Admitting	Medical	MEDIC_2002.snd
Ambulance	Medical	MEDIC_2003.snd
Ambulatory surgery centers	Medical	MEDIC_2004.snd
Anaesthetics	Medical	MEDIC_2005.snd
Audiology	Medical	MEDIC_2006.snd
Bariatric Program	Medical	MEDIC_2007.snd
Behavioral Medicine	Medical	MEDIC_2008.snd
Cafeteria	Medical	MEDIC_2009.snd
Cardiac Intensive Care Unit	Medical	MEDIC_2010.snd
Cardiac Rehab	Medical	MEDIC_2012.snd
Cardiology	Medical	MEDIC_2011.snd
Chaplaincy	Medical	MEDIC_2013.snd
Children's Neurological Institute	Medical	MEDIC_2014.snd
Credit Union	Medical	MEDIC_2015.snd
Critical Care	Medical	MEDIC_2016.snd

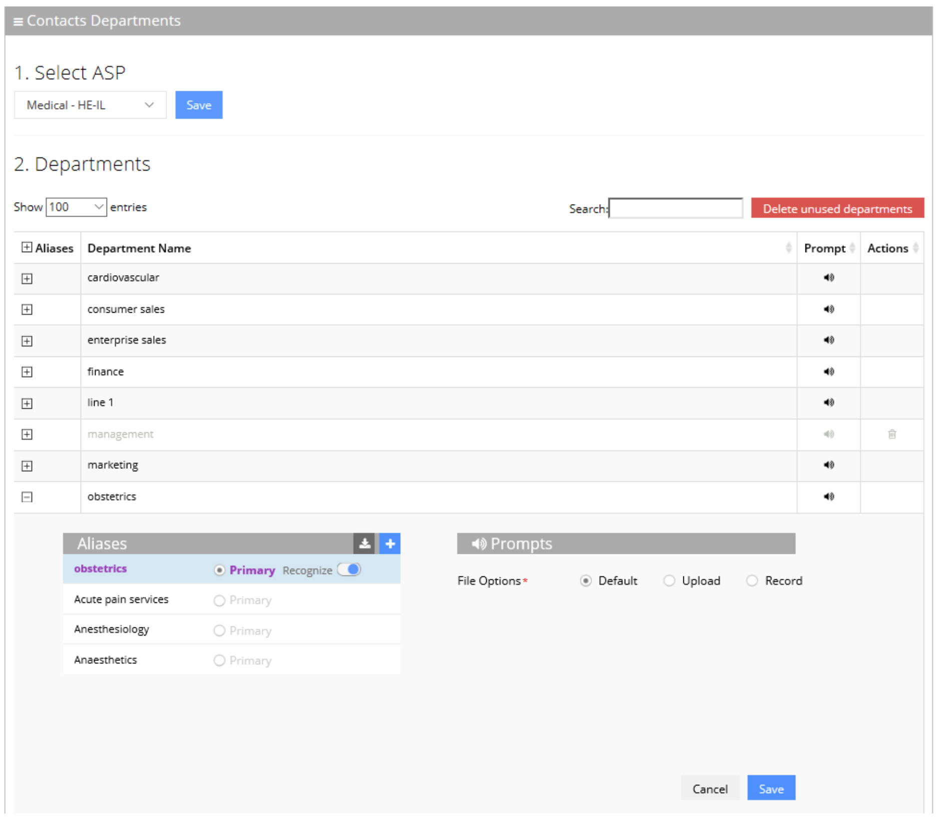
6. Select the Department Name(s) you wish to import. The selected departments are shaded.

Figure 4-15: Import Package



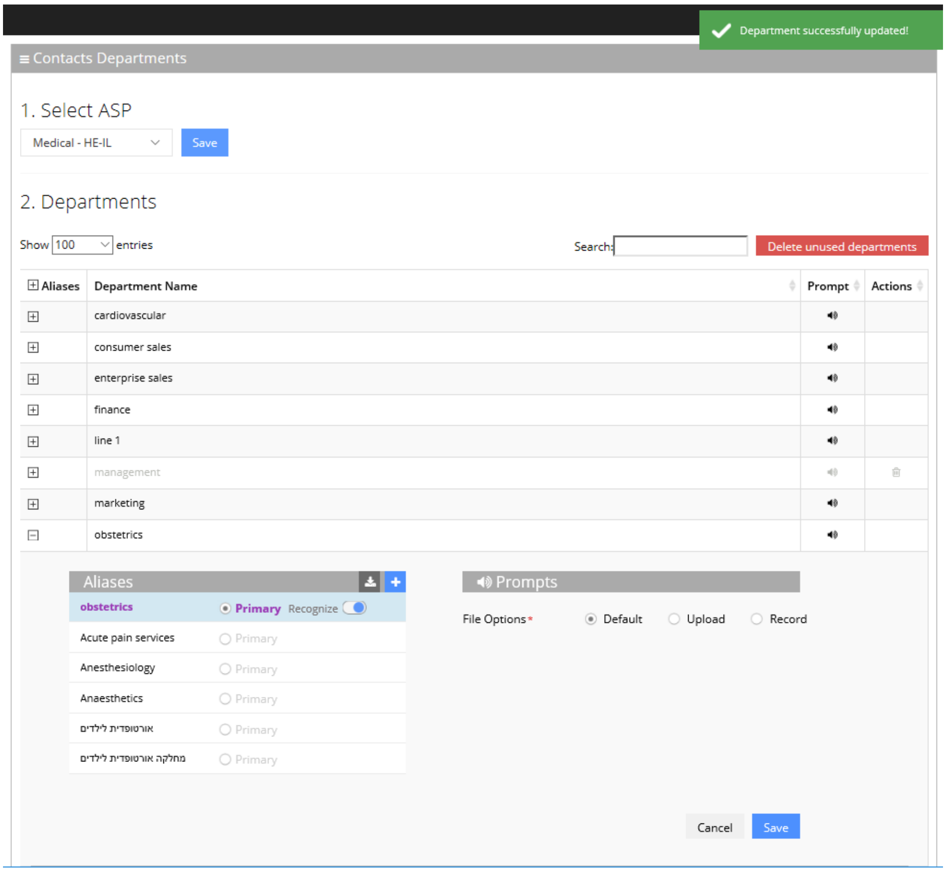
7. Click **Import Package**; the imported departments are highlighted in green.

Figure 4-16: Selected Departments



8. Click **Save** to complete the import phase; the green highlight is removed. A message appears in the top right-hand part of the screen with a message "Department successfully updated".

Figure 4-17: Imported Departments



Importing Contacts Department

The CSV file to be imported should contain the following:

- **UID (mandatory):** An employee ID or any unique number, name or both needs to be entered.
- **Department Name:**
- **Aliases:** Should be separated by a semi-colon ';'. Only the first alias can be set as 'Primary' and starts with '#'.
- **Recognize:** The two possible values are:
  - True (1)
  - False (0)

If no alias has been set as 'Primary', then Recognize must be set to 'True' (1).

The Excel file can be imported according to the following layout:

Using the Dictionary List

Voca provides the ability to create separate lists of departments that can be used on a menu level for detection. You can manually add Department Names or import them from pre-defined packages into your department lists.

For every tenant/service the "Default" Dictionary List is pre-defined and can't be deleted. It can be used for creating your list or alternatively you can create a new department list with your required name.

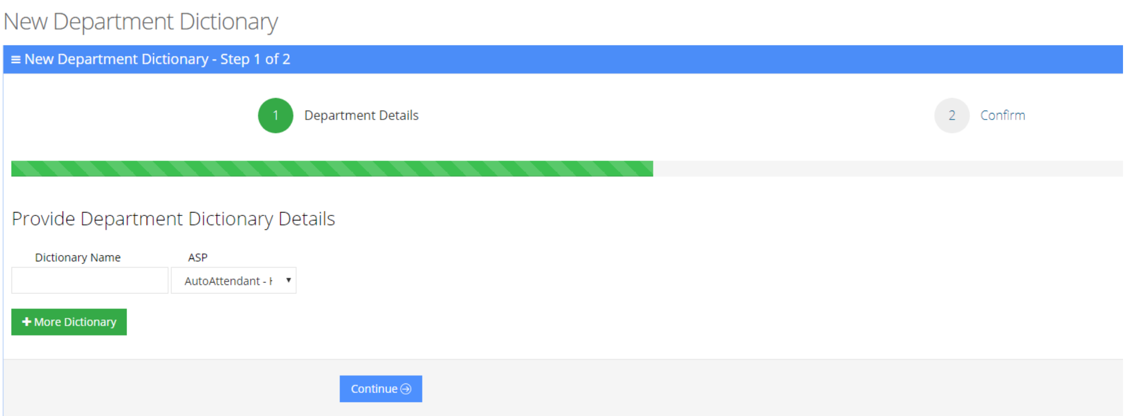
Adding Department Dictionary

The procedure below describes how to add a department dictionary.

➢ **To add a department dictionary:**

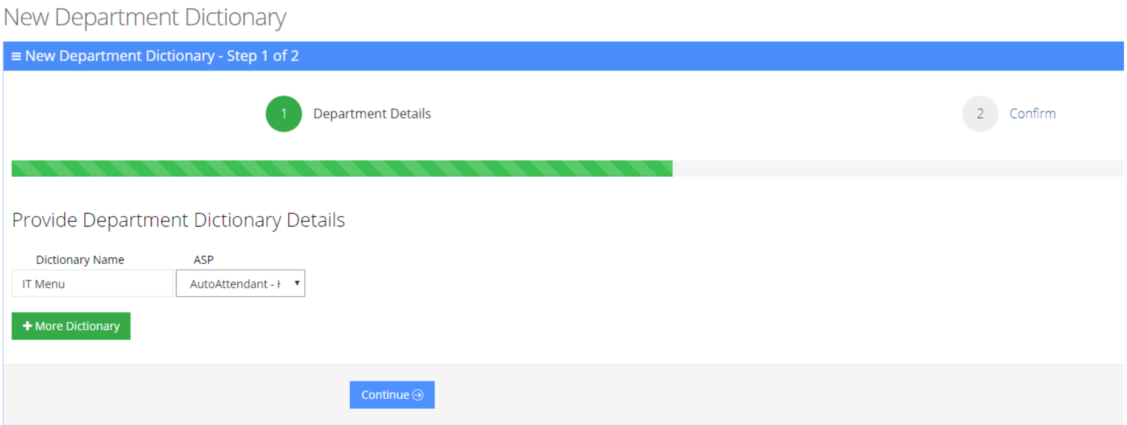
1. Open the Department Dictionary menu (**Departments** > **Dictionary List**).
2. Click **Add New**; the following screen appears:

Figure 4-18: New Department Dictionary



3. Under the Provide Department Dictionary Details group, enter the following:
   - Dictionary Name
   - ASP
4. Enter the required fields.

Figure 4-19: Provide Department Dictionary Details



5. Click **Continue**.
6. Click **Save Information**.

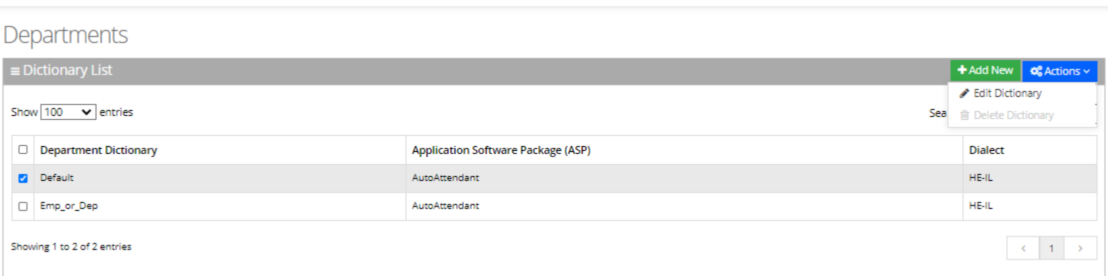
Editing Department Dictionary

The procedure below describes how to edit a Department dictionary.

➢ To edit a department Dictionary:

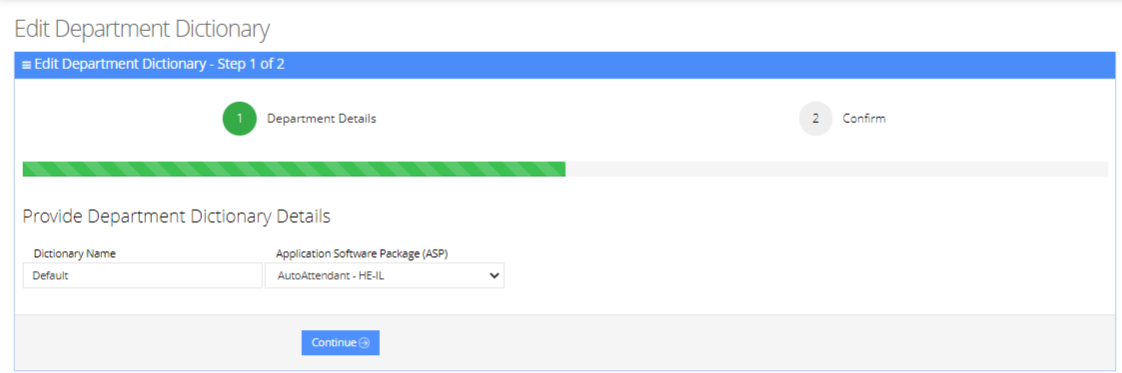
1. Open the Department Dictionary menu (**Departments** > **Dictionary List**).
2. Check the **Department Dictionary** that you wish to edit.
3. From the 'Actions' drop-down list, select **Edit Dictionary**.

Figure 4-20: Edit Department Dictionary



4. Edit the required fields.

Figure 4-21: Edit Department Dictionary Details



5. Click **Continue**.
6. Click **Save Information**.

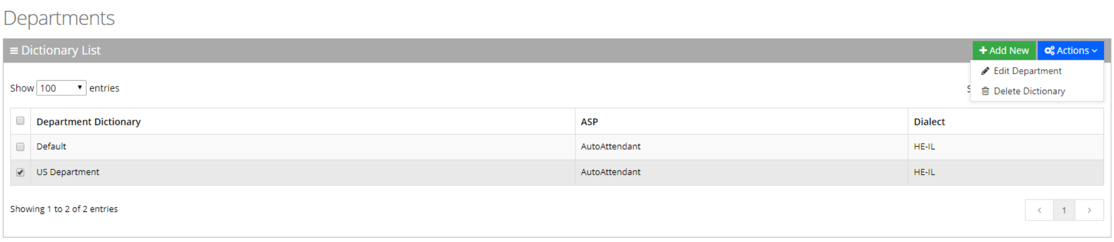
Deleting Department Dictionary

The procedure below describes how to delete a department Dictionary.

➢ To Delete a department Dictionary:

1. Open the Department Dictionary menu (**Departments** > **Dictionary List**).
2. Check the Department Dictionary that you wish to Delete.
3. From the drop-down action list select **Delete Dictionary**.

Figure 4-22: Delete Department Dictionary



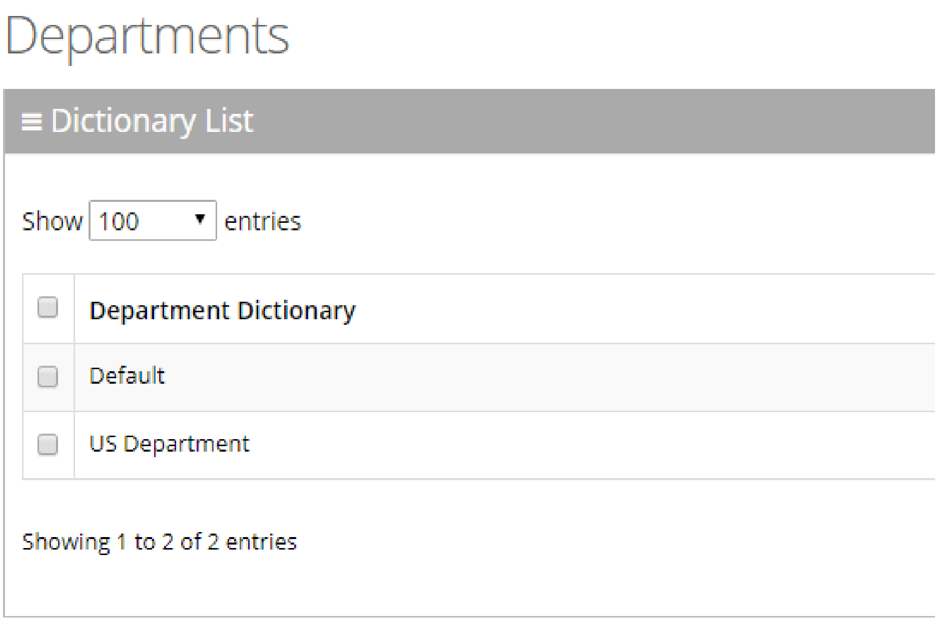
Adding a Department Manually

The procedure below describes how to add a department to specific department Dictionary manually.

➢ To add a department manually:

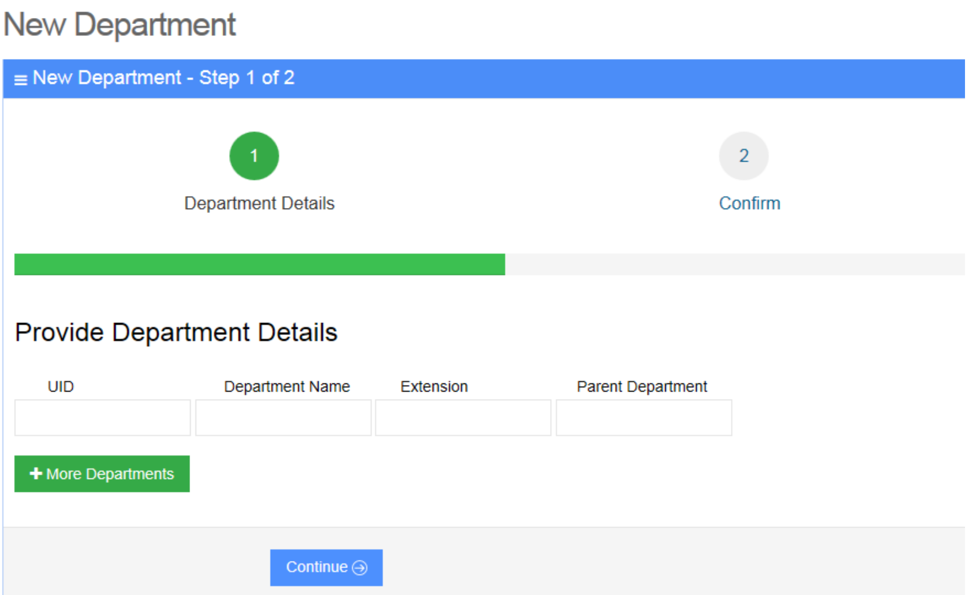
1. Open the Departments menu and click on the required department Dictionary (**Departments** > **<department Dictionary name>**).
2. Click on the **Department List** menu.

Figure 4-23: Open Department List



3. Click **Add New;** the following screen appears:

Figure 4-24: New Department

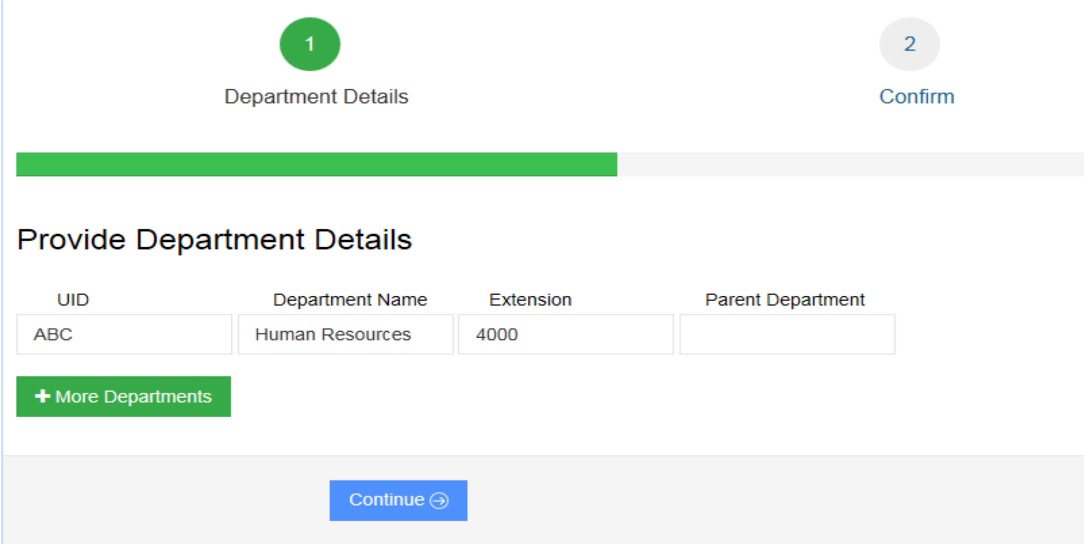


4. Under the **Provide Department Details** group, enter the following:
   - UID
   - Department Name
   - Extension
   - Parent Department

5. Enter the required fields.

- Every Department must have a unique ID. It can either be a unique number or a name (e.g., ABC123).
- The ‘Parent Department’ field can be ignored for this step.

Figure 4-25: Provide Department Details



6. Click **Continue**.
7. Click **Save Information**.

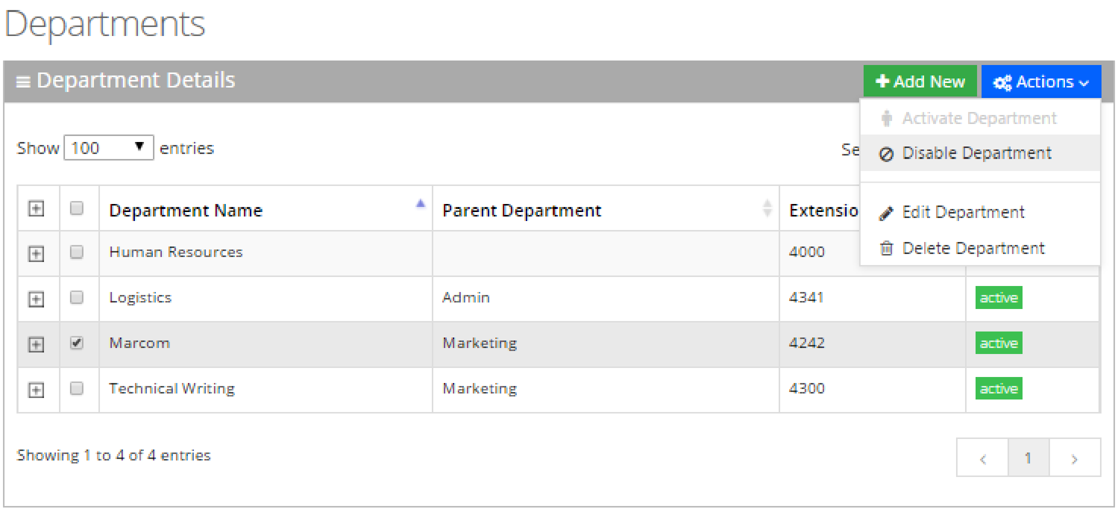
Disabling a Department

The procedure below describes how to disable a department.

➢ **To disable a department:**

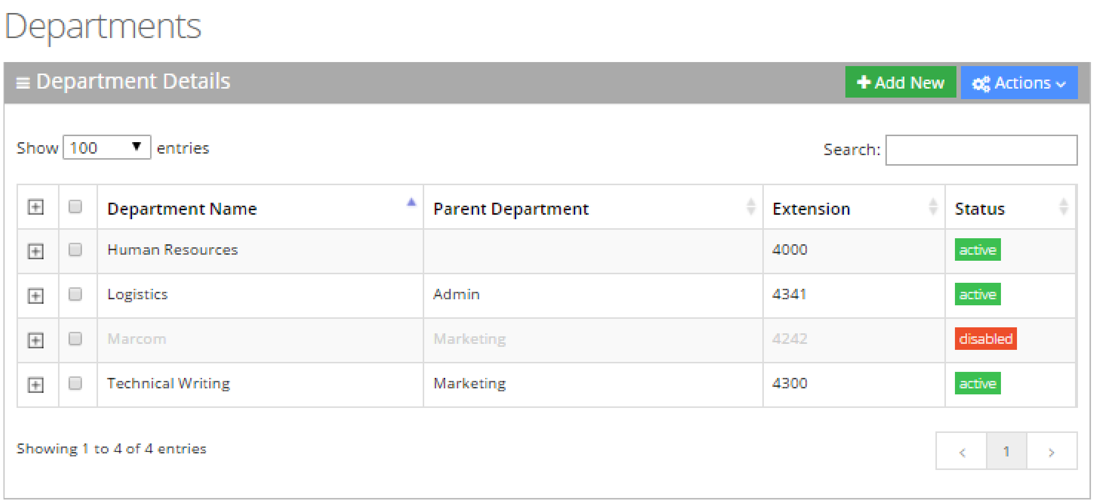
1. Open the **Departments** menu and click on the required department (**Departments** > **<Department Dictionary name>**).
2. Click on the **Department List** menu.
3. Select the department you wish to disable by enabling the **Department** check box.
4. From the ‘Actions’ drop-down list, select **Disable Department**.

Figure 4-26: Disabling a Department



5. The selected department is "disabled" as shown in the figure below:

Figure 4-27: Disabled Department



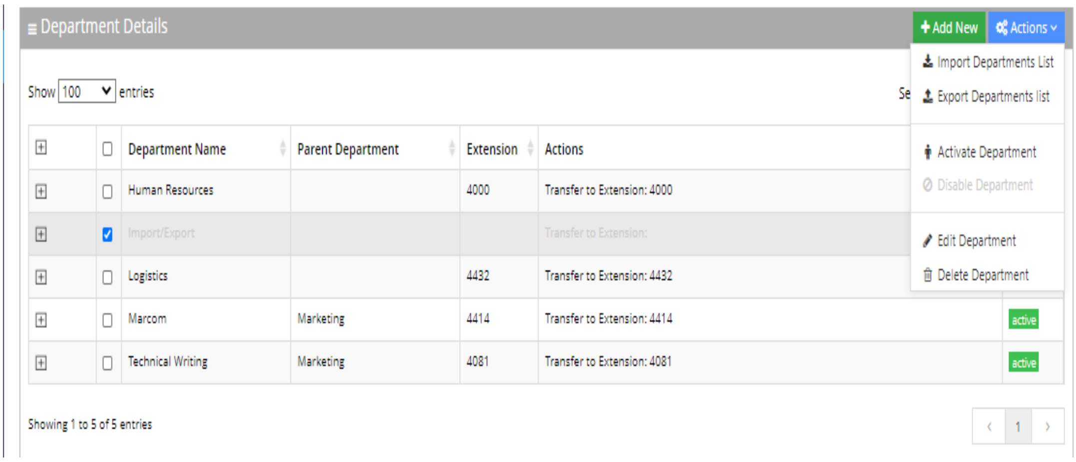
Activating a Department

The procedure below describes how to activate a department.

➢ **To activate a department:**

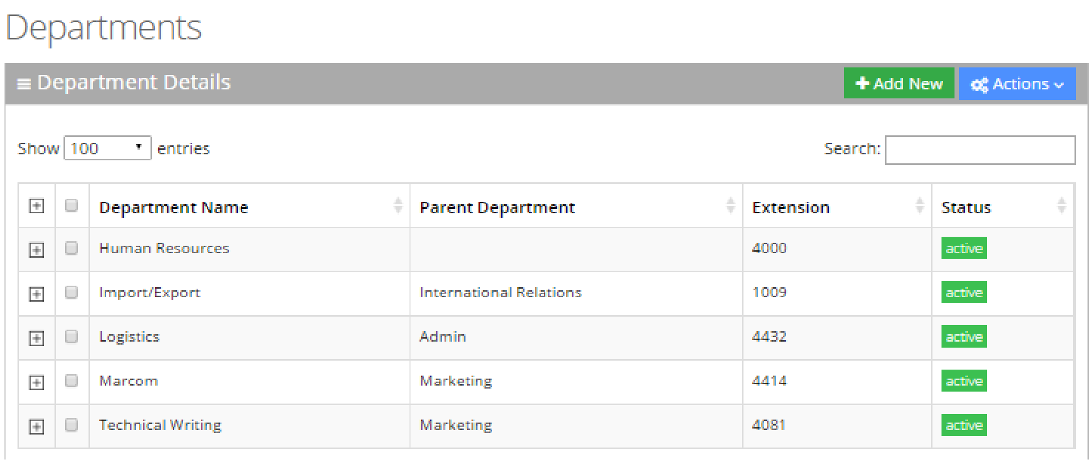
1. Open the Departments menu and click on the required department Dictionary (**Departments** > **<department Dictionary name>**).
2. Click on the Department List menu.
3. Select the department you wish to activate by enabling the **Department** check box.
4. From the ‘Actions’ drop-down list, select **Activate Department**.

Figure 4-28: Activate a Department



5. The disabled department appears with a green status of "active", as shown below.

Figure 4-29: Activated Department



Editing a Department

The procedure below describes how to edit a department.

➢ **To edit a department:**

1. Open the **Departments** menu, and then click on the required department (**Departments** > **<department Dictionary name>**).
2. Click on the **Department List** menu
3. Select the department you wish to edit by enabling the **Department** check box.
4. From the ‘Actions’ drop-down list, select **Edit Department**; the following screen appears:

Figure 4-30: Department Detail Actions

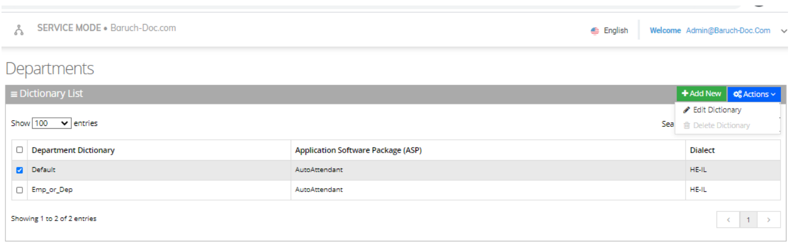
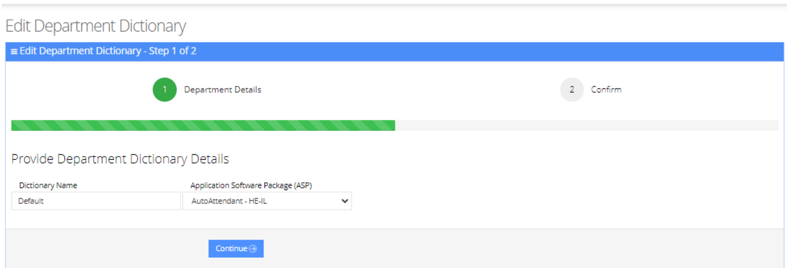
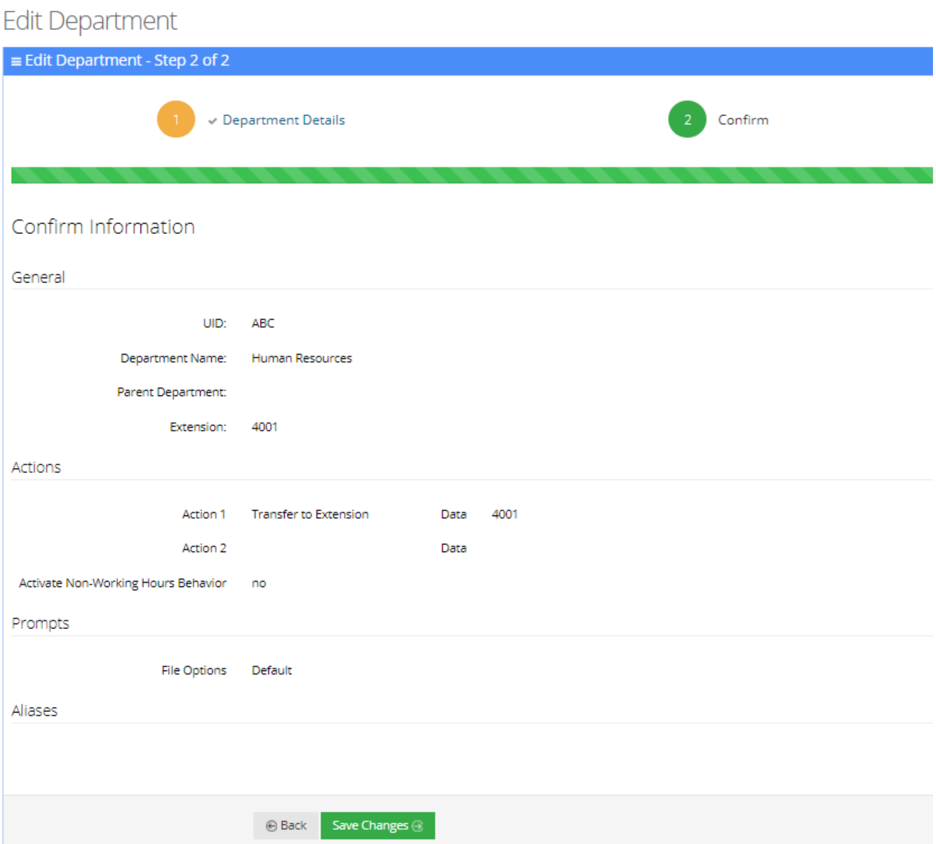


Figure 4-31: Edit Department Dictionary



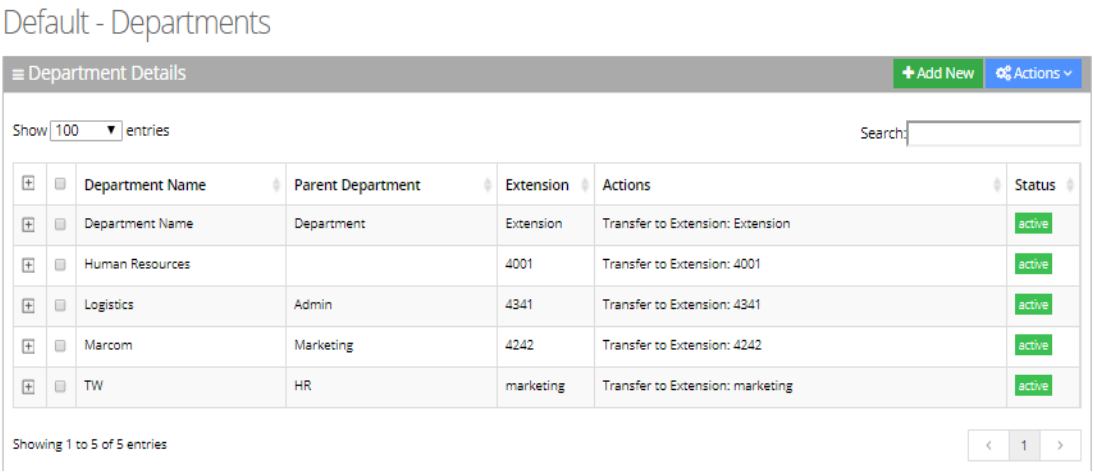
5. Make your changes on the 'Edit Department' screen, and then click **Continue**.

Figure 4-32: Edit Department – Save Changes



6. Click **Save Changes**; the updated Department details appear.

Figure 4-33: Updated Information



Department Name	Parent Department	Extension	Actions	Status
Department Name	Department	Extension	Transfer to Extension: Extension	active
Human Resources		4001	Transfer to Extension: 4001	active
Logistics	Admin	4341	Transfer to Extension: 4341	active
Marcom	Marketing	4242	Transfer to Extension: 4242	active
TW	HR	marketing	Transfer to Extension: marketing	active

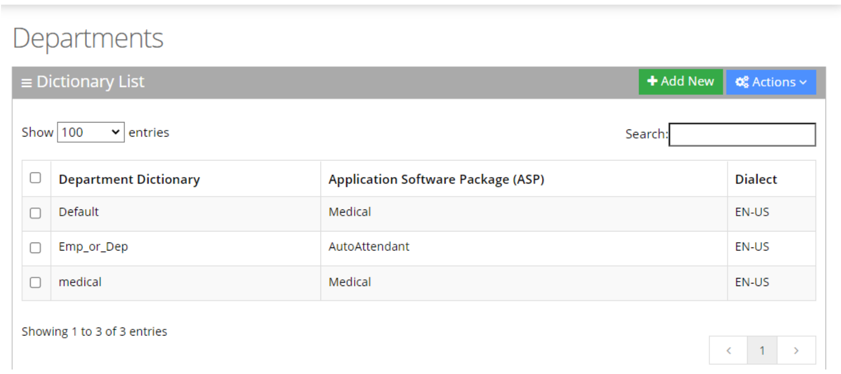
Setting Actions for a Department

The procedure below describes how to set various actions for each department.

➢ To set Actions for a Department:

1. On the menu pane, under the **Departments** menu, select the Department Dictionary name you wish to edit.
2. Click the **Dictionary List** menu option. In our example, we selected the 'Default' Dictionary List.

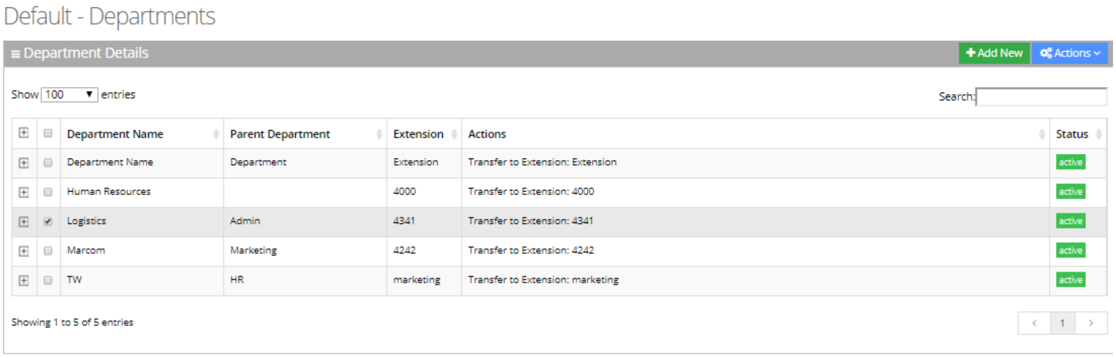
Figure 4-34: Departments List



Department Dictionary	Application Software Package (ASP)	Dialect
Default	Medical	EN-US
Emp_or_Dep	AutoAttendant	EN-US
medical	Medical	EN-US

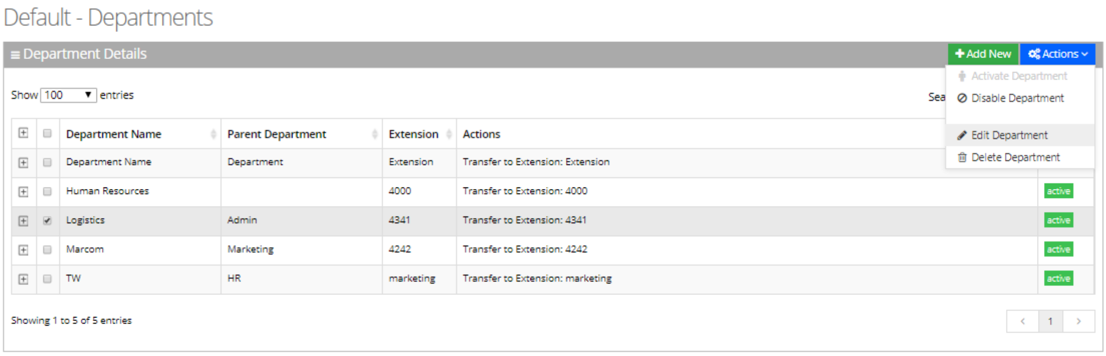
3. Click on the **Departments List** menu option, and then select a department to edit.

Figure 4-35: Selecting Department within Departments List



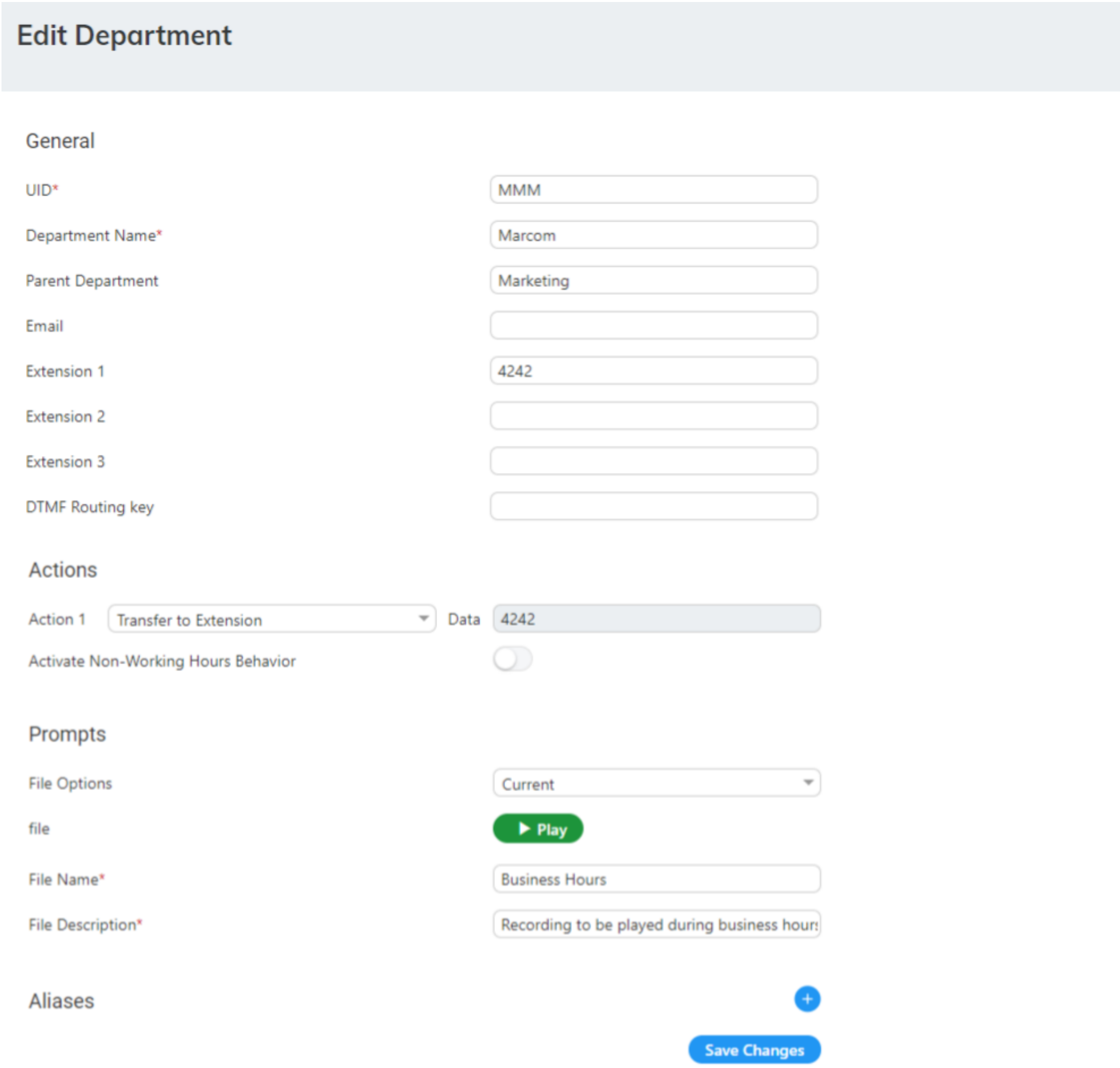
4. Click the **Actions** drop-down list.

Figure 4-36: Selecting Department



5. Select **Edit Department**; the Edit Department screen appears:

Figure 4-37: Selecting Edit Department

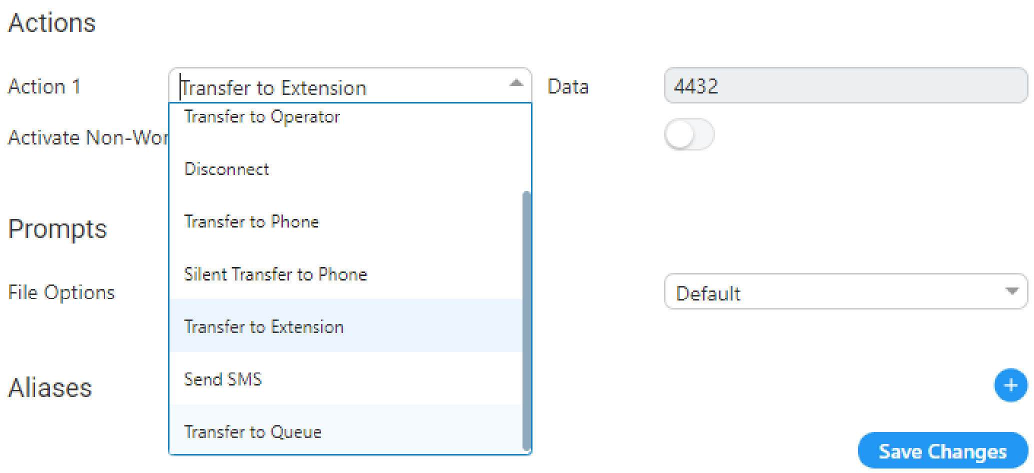


- In the 'Email' field, enter the main department email address that can be used for sending missed call notifications for that department.
- In the 'Extension 1/2/3' fields, enter the extension numbers for the department. These extensions might be used if Call Hunting is activated for departments in the Speech menu.
- In the 'DTMF Routing key' field, enter the DTMF routing key. This key is used to reach this department, when entering this DTMF code during the Speech menu (If **Transfer by DTMF routing key** is enabled in the menu). The key must be unique within the service.

6. From the 'Action 1' drop-down list, select one of the following options:

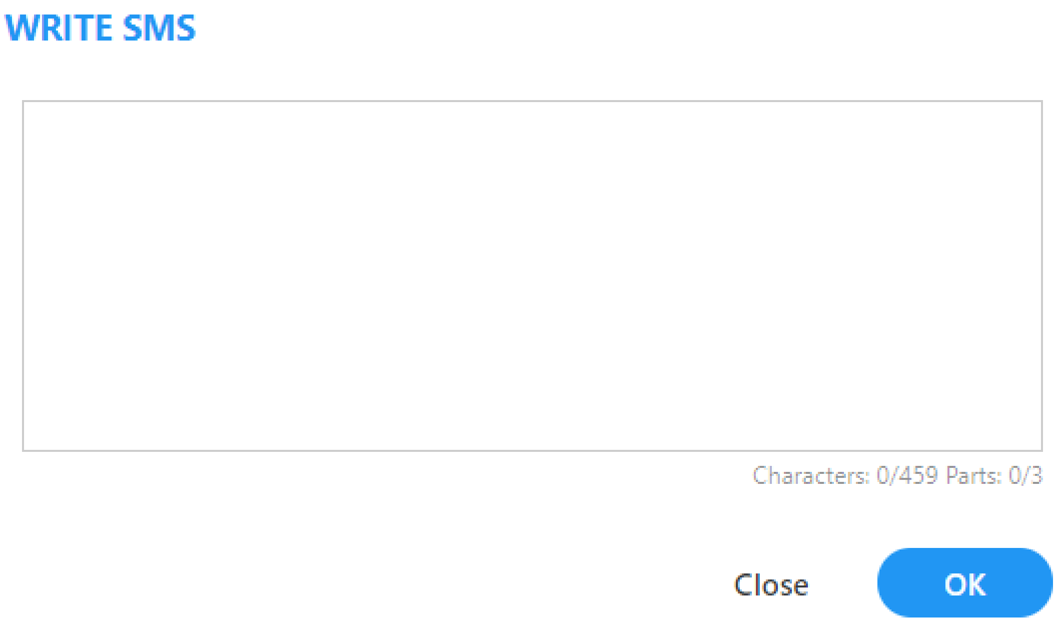
Figure 4-38: Actions for Department Fields

Figure 4-39:



- **Play prompt:** The system will play a prompt described in the Action 1 Data field and then perform the action described in Action 2.
- **Go to menu:** The system will be directed to another menu, specified in the Action 1 Data field.
- **Transfer to Operator:** The system will transfer the call to the operator.
- **Disconnect:** The system will automatically disconnect.
- **Transfer to Phone:** The system will transfer the call to a phone number as shown in in the Action 1 Data field.
- **Silent Transfer to Phone:** The system transfers the call to the extension without playing the "Transferring the call to…" prompt.
- **Transfer to Extension:** The system will transfer the call to the extension number.
- **Send SMS:** Allows for an SMS message to be sent.
  - If you want to send an SMS, from the 'Action 1' drop-down list, select **Send SMS**.
  - In the 'Action 1 Data' field, click the  icon; the following appears:

Figure 4-40: Write SMS



- Write the SMS, and then click **OK**. The SMS is sent as the first Action Type for the appropriate key.
- Note that the number of characters in the SMS, is limited by the allowed message parts and the language type used.
- Sending an SMS must be followed by an action.

> If you have selected "Send SMS" and you are calling from a mobile phone, the SMS is sent directly to your mobile phone. If you are calling from a landline, the system asks you to enter the mobile number that you wish to receive the SMS on.

> The "Send SMS" action is only applicable if the Administrator has given the appropriate permissions.

- **Transfer to Queue:** Transfers the call to a predefined call queue.

7. In the 'Action1 Data' field, enter the related action data for the 'Action 1' field.

Non-Working Hours Behavior for a Department

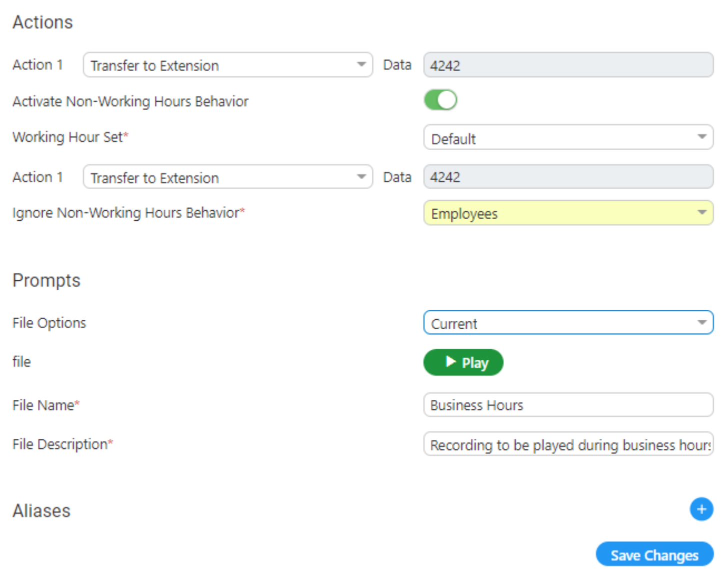
The procedure below describes how to set Non-Working Hours behavior for each department.

➢ To set Non-Working Hours behavior:

1. See Steps 1 to 5 in Setting Actions for a Department on page 49.

2. From the screen in Step 5, enable 'Activate Non-Working Hours Behavior'; the following fields become available.

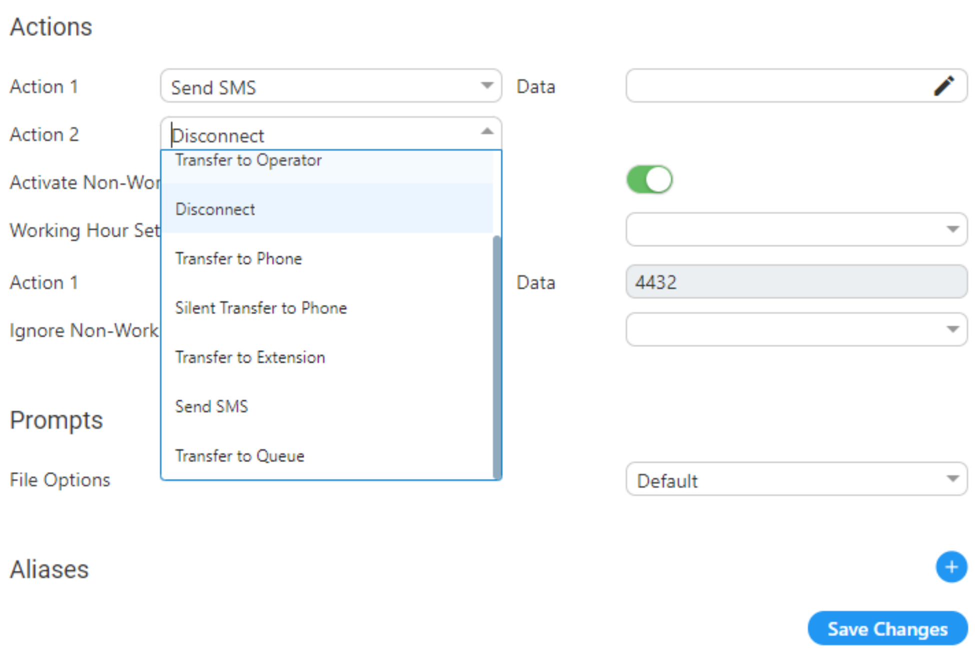
Figure 4-41: Non-Working Hours Behavior Fields



3. From the 'Working Hours Set' drop-down list, you can select a pre-configured list of working hours set for each department (See Defining Working Hours on page 147).

Figure 4-42: Activate Non-Working Hours Behavior Fields

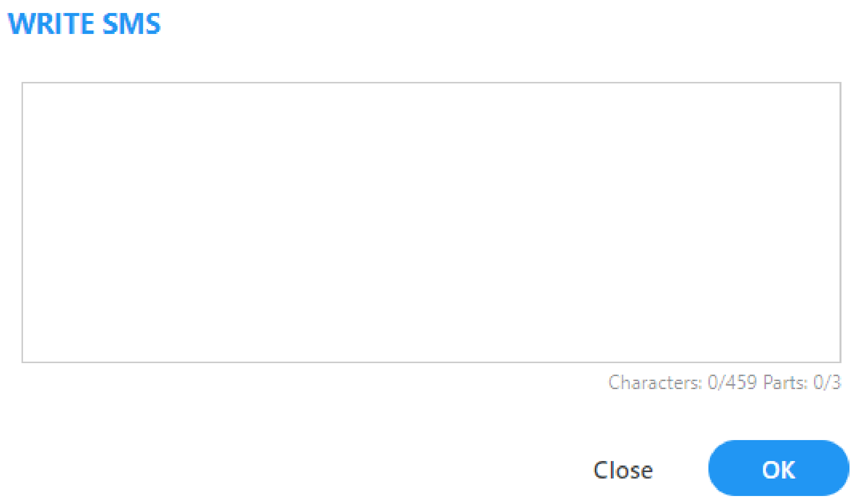
Figure 4-43:



4. From the 'Action 1' drop-down list, select one of the following options:
   - **Play prompt:** The system will play a prompt described in the Action 1 Data field and then perform the action described in Action 2.

- **Go to menu:** The system will be directed to another menu, specified in the Action 1 Data field.
- **Transfer to Operator:** The system will transfer the call to the operator.
- **Disconnect:** The system will automatically disconnect.
- **Transfer to Phone:** The system will transfer the call to a phone number as shown in in the Action 1 Data field.
- **Transfer to Extension:** The system will transfer the call to the extension number.
- **Send SMS:** Allows for an SMS message to be sent.
    - If you want to send an SMS, from the 'Action 1' drop-down list, select **Send SMS**.
    - In the 'Action 1 Data' field, click the icon; the following appears:

Figure 4-44: Write SMS



    - Write the SMS, and then click **OK**. The SMS is sent as the first Action Type for the appropriate key.
    - Note that the number of characters in the SMS, is limited by the allowed message parts and the language type used.
    - Sending an SMS must be followed by an action.

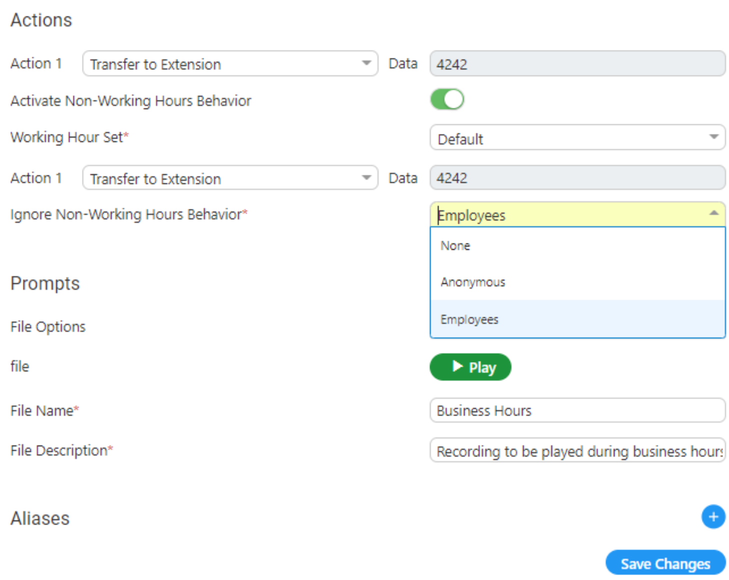
If you have selected "Send SMS" and you are calling from a mobile phone, the SMS is sent directly to your mobile phone. If you are calling from a landline, the system asks you to enter the mobile number that you wish to receive the SMS on.

The "Send SMS" action is only applicable if the Administrator has given the appropriate permissions.

- **Transfer to Queue:** Transfers the call to a predefined call queue.

5. In the 'Action1 Data' field, enter the related action data for the 'Action 1' field.

Figure 4-45: Ignore Non-Working Hours Behavior Fields



6. From the ‘Ignore Non-Working Hours Behavior’ drop-down list, you can select to which type of callers the non-working hours behavior will not take effect:
   - **None:** Select this option if you want the non-working hours behavior to affect all callers.
   - **Anonymous:** Select this option if you want the non-working hours behavior not to affect anonymous (non-employees) callers.
   - **Employees:** Select this option if you want the non-working hours behavior not to affect employee’s callers.

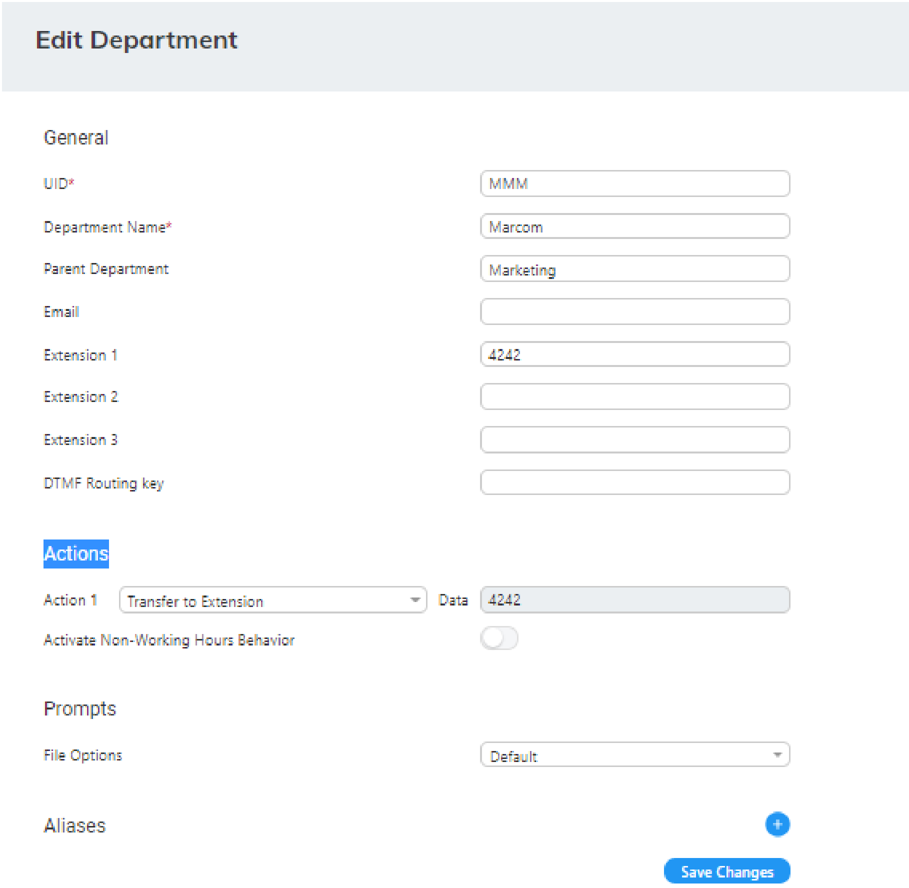
Configuring Department Prompts

The procedure below describes how to configure a Department audio prompt for the Voca service. You can use an existing default prompt, upload a prompt or record a new prompt.

➢ To use the default department prompt:

1. Open the Department menu and click on the required department (**Departments** > **<department Dictionary name>**).
2. Click on the **Department List** menu.
3. Select the department you wish to edit by enabling the **Department** check box.
4. From the ‘Actions’ drop-down list, select **Edit Department**; the following screen appears:

Figure 4-46: Edit Department

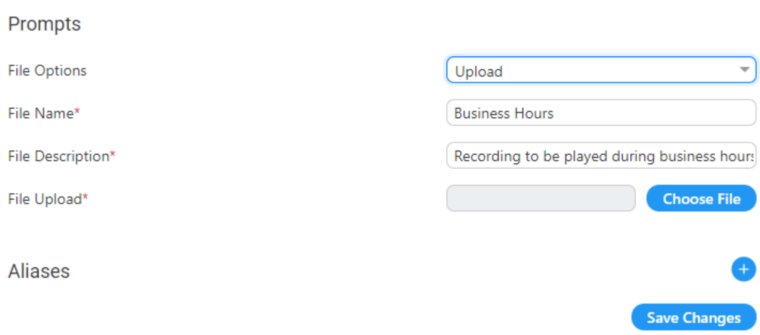


5. Under the **Prompts** group, select 'default' to use a pre-existing prompt.

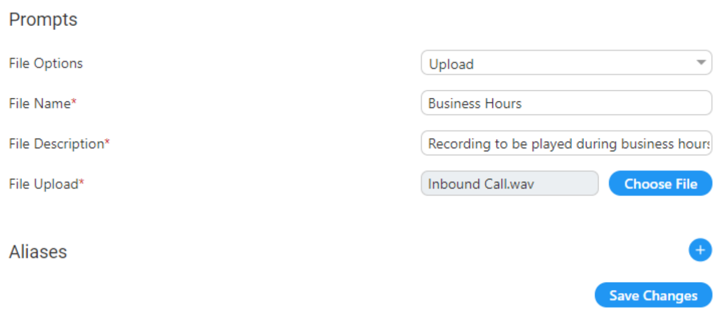
➢ **To upload a prompt:**

1. From the 'File Options' drop-down list, select **Upload**.

Figure 4-47: New Prompt Details



2. In the 'File Name' field, enter the audio file name.
3. In the 'File Description' field, enter a description of the prompt.
4. Click **Choose File** to locate the audio file to be uploaded; and then click **Open** to select the file.



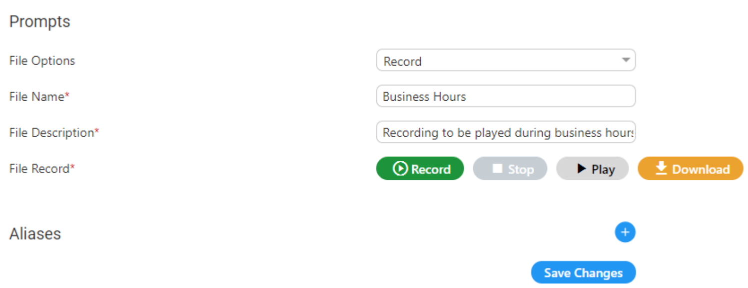
5. Click **Save Changes** to complete the upload process. A "department Successfully Updated" message appears.

> The audio file must be in the following format - .wav file, with 16 Bit Resolution, mono, 8000Hz.

➢ To record a prompt:

1. From the 'File Options' drop-down list, select **Record**.
2. Click **Record** and then begin recording your prompt.

Figure 4-48: Record New Prompt Details



3. When finished recording, click **Stop**.
4. To replay the recent recording, click **Play**.
5. To save a copy of the recorded audio file, click **Download**.
6. Click **Save Changes** to complete the recording process.

Creating an Alias for a Department

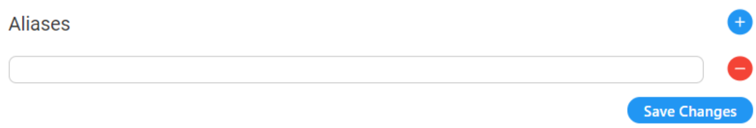
An alias is another name for a department, known or more familiar under another specified name. You can create an alias for a specified department.

➢ To create an alias for a department:

1. Open the **Departments** menu and click on the required department (**Departments** > **<department Dictionary name>**).
2. Click on the **Department List** menu.

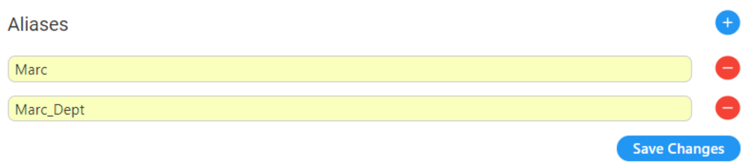
3. Select the department you wish to edit by selecting the **Department** check box.
4. From the 'Actions' drop-down list, select **Edit Department**.
5. Under the **Alias** group, click **+** ; the following screen appears:

Figure 4-49: Create an Alias for a Department - Edit Department



6. Enter the alias name(s).

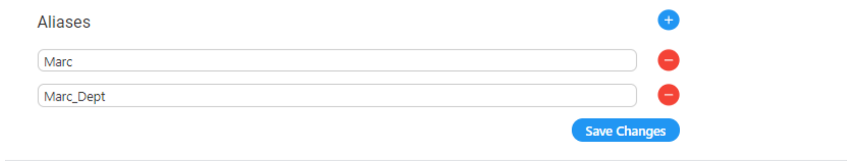
Figure 4-50: Create an Alias for a Department - Continue



> You can remove an alias by clicking the red "-" icon.

7. Click **Save Changes**; the changes have been updated. When you edit the same department, the recent alias changes appear.

Figure 4-51: Create an Alias for a Department - Save



8. In the above example, you can use either "Marcom", "Marc" or "Marc_Dept" when calling the Marcom department.
9. Click **Save Changes**. A "Department Successfully Updated" message appears.

> You are not allowed to add an alias that is the same as:
>
> - Parent department of another department
>
> or
>
> - Department name with an empty Parent name

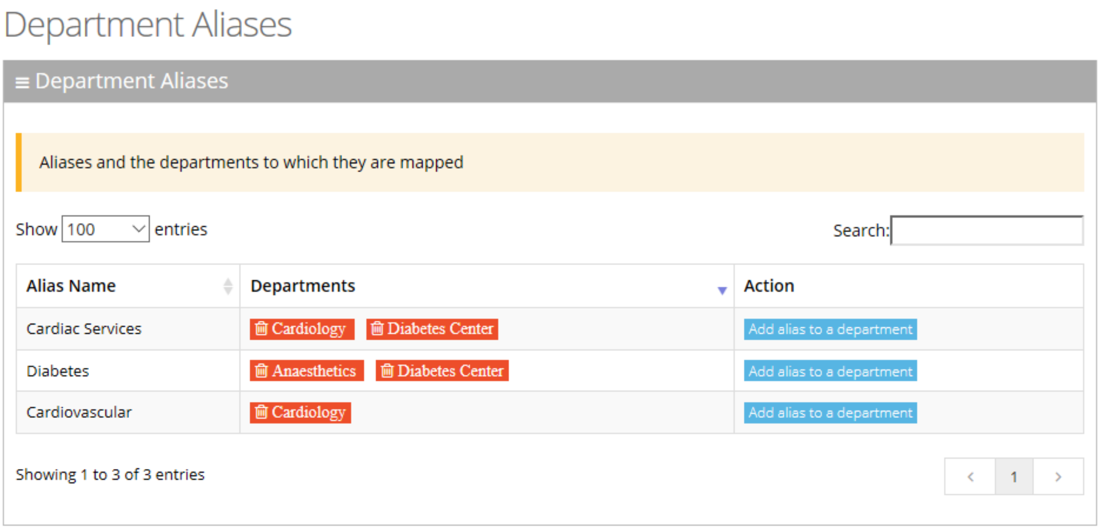
Aliases to Departments Mapping

The procedures below describe how aliases are mapped to departments and allow removing aliases and adding aliases to additional departments.

➢ To add an Alias to a Department:

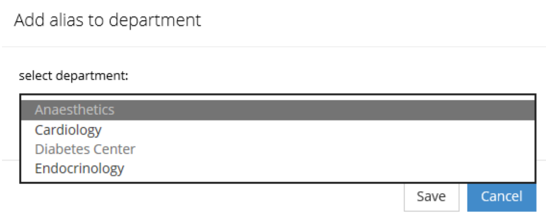
1. Open the Departments Aliases page (**Departments** > **Default** > **Department Aliases**).

Figure 4-52: Department Aliases



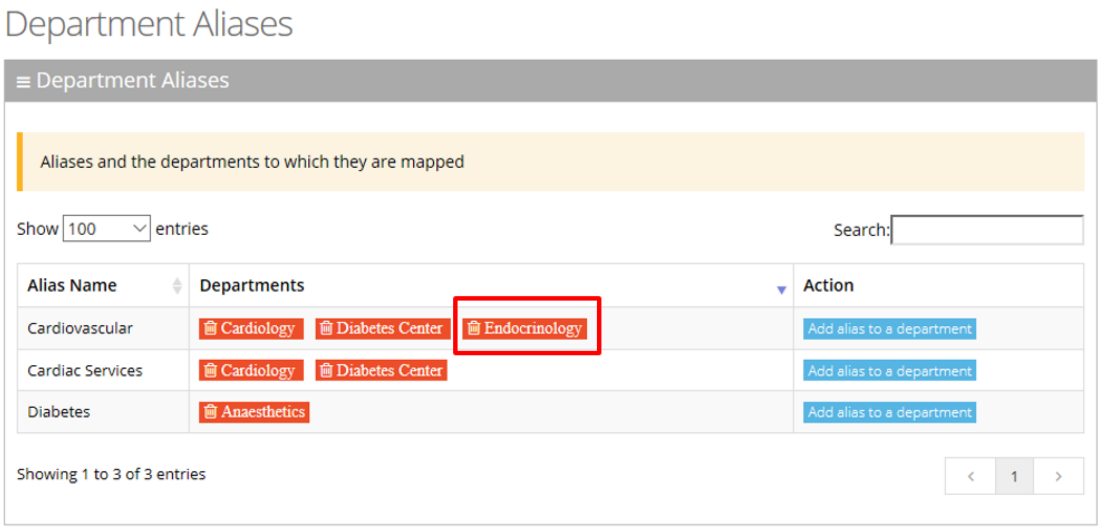
2. Place the cursor on the Alias that you wish to have the department mapped to.
3. In the **Action** column, click the Add alias to a department button.
4. From the Department drop-down list, select the department you wish to map to the alias.

Figure 4-53: Add Alias to Department



5. Click **Save**. (In our example, "Endocrinology" was added to the Cardiovascular alias name.)

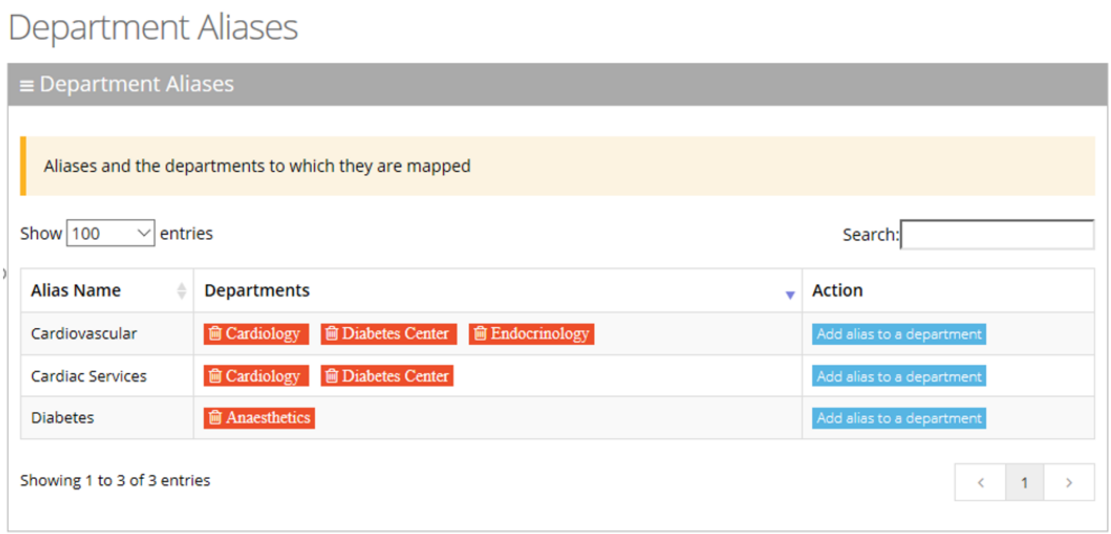
Figure 4-54: Department Aliases - Example



➢ To delete an Alias from a Department:

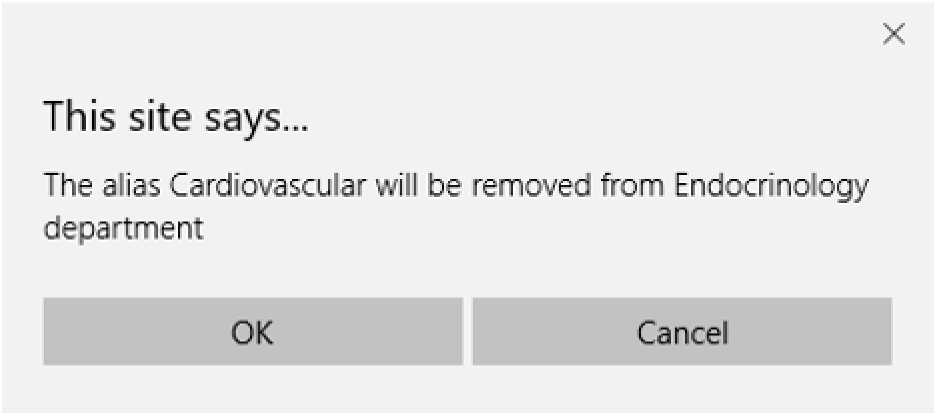
1. Open the Departments Aliases page (**Departments** > **Default** > **Department Aliases**).

Figure 4-55: Department Aliases



2. Double-click a department button that you want to delete. In our example, we want to delete "Cardiovascular" from the Endocrinology department.

Figure 4-56: Removing Alias

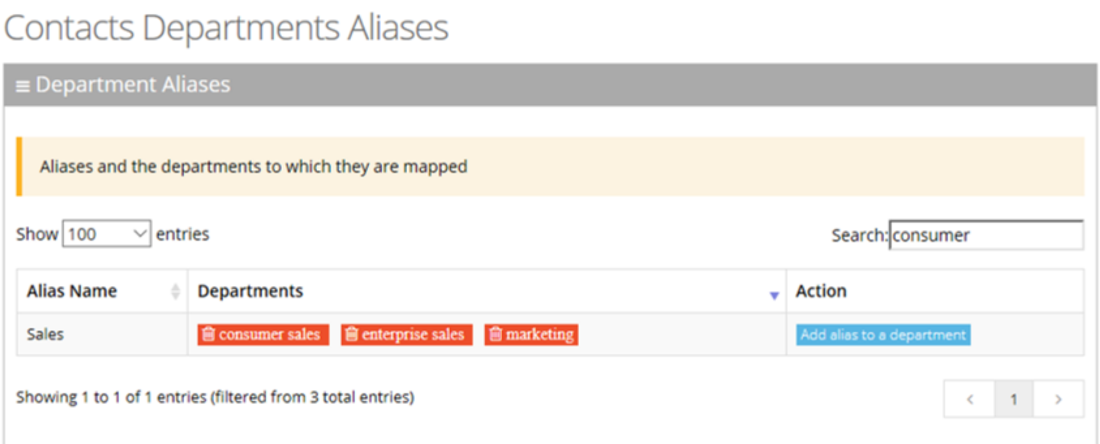


3. Click **OK**.

Searching for an Alias

You can use the **Search** box to search for specific text on the Department Aliases page.

Figure 4-57: Searching for an Alias/Department



Deleting a Department

The procedure below describes how to delete a department.

➢ **To delete a department:**

1. Open the **Departments** menu and click on the required department (**Departments** > **<department Dictionary name>**).
2. Click on the **Department List** menu.
3. Select the department you wish to delete.
4. From the 'Actions' drop-down list, select **Delete Department**.
5. The following message appears: "Are you sure you want to delete the selected department (s)?"

6. Click **OK** to delete the selected department.

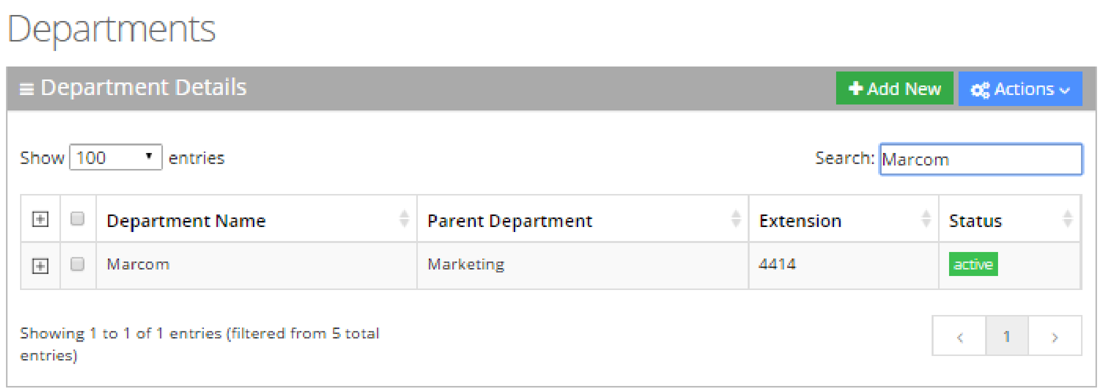
Searching a Department

The procedure below describes how to search for a department.

➢ To search for a department:

1. Open the Departments menu and click on the required department (**Departments** > **<department Dictionary name>**).
2. Click on the **Department List** menu.
3. Enter the search criteria in the **Search** field; the searched data is displayed.

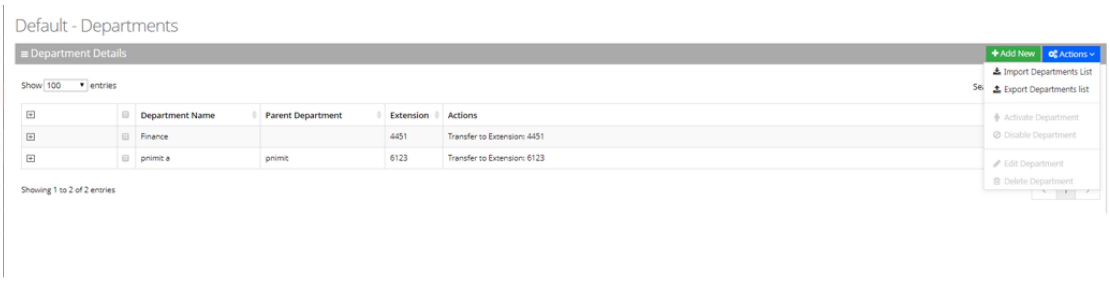
Figure 4-58: Search Department



Importing/Exporting Department List

The procedure below describes how to import and export CSV or XLS files containing Department lists from/to a specific department Dictionary. When using CSV files, we recommend you use Notepad++ and save files in UTF-8 encoding format.

Figure 4-59: Import/Export Department List



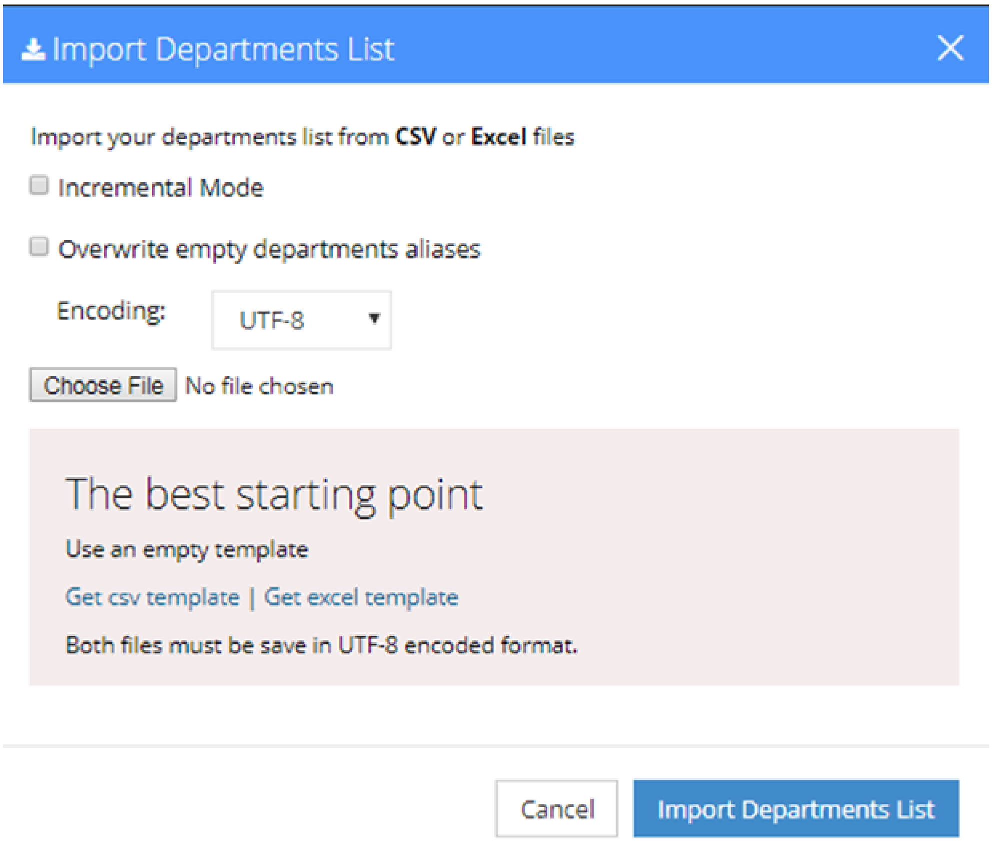
Importing Department Information

The procedure below describes how to import department information.

➢ To import department information:

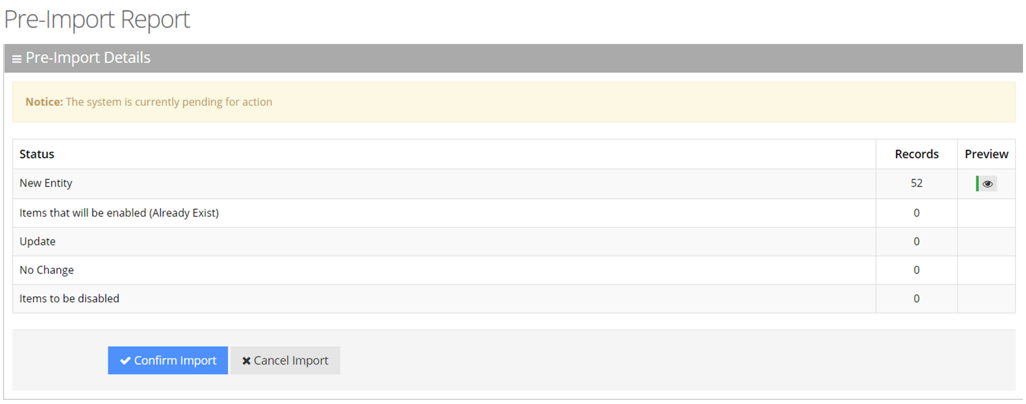
1. From the Actions drop-down list, on the Department Details screen, click **Import Departments List**.

Figure 4-60: Import Departments List



2. If you select the 'Incremental Mode' check box, only the records that you are importing are activated in your Departments List. All pre-existing records are disabled.
3. If you select the 'Overwrite empty departments aliases' check box, all empty departments aliases in the imported file are overwritten.
4. From the 'Encoding' drop-down list, select the Encoding type. The recommended value is **UTF-8**.
5. Click **Choose File** and select the file to be imported.
6. Select the CSV or Excel template.
7. Click **Import Departments List**.

Figure 4-61: Pre-Import Report

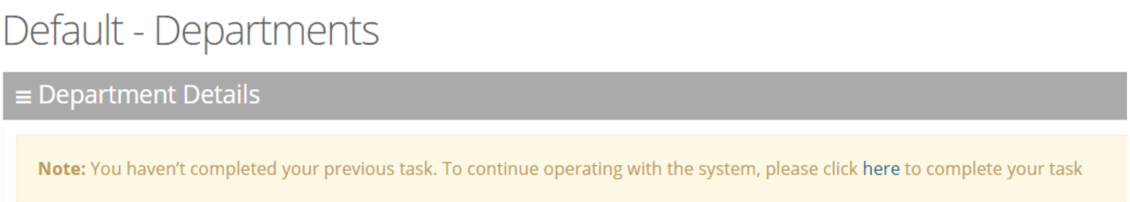


This report lists the status of the departments to be imported. In this example, 52 new departments are ready to be imported. Clicking the Preview icon, displays these new departments before they are imported.

8. Click **Confirm Import** to import the departments. If you wish to cancel the import process, click **Cancel Import**.

If you do not click **Confirm Import/Cancel Import** or switch to another tab, the actual import will be pending and all departments will be disabled. The following screen appears:

Figure 4-62: Uncompleted Department Import



9. You can return to the Confirm Import or Cancel Import processes by clicking on the here link.
10. The CSV to be imported should contain the following:
    - UID (mandatory) - a Department ID or any unique number, name or both need to be entered.
    - Department name
    - Extension number
    - Aliases separated by ";"

> It is highly recommended that the CSV file will be saved in UTF-8 encoding format (Unicode Text). Use Notepad++ to view CSV files.

11. The Excel file can be imported according to the following layout:

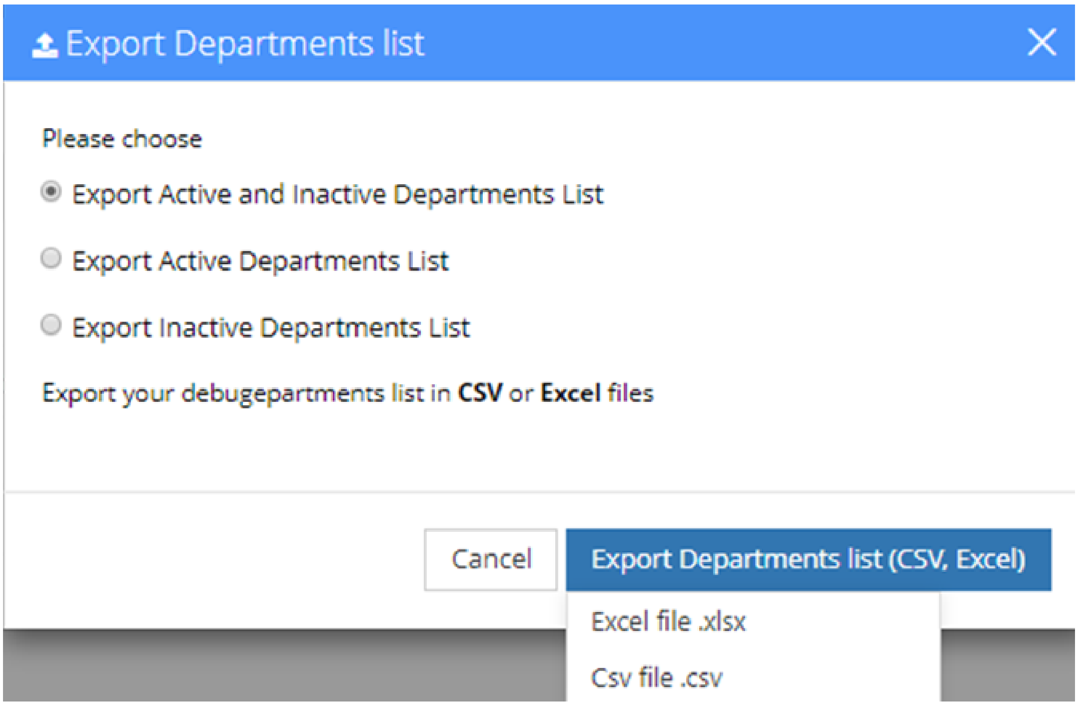
Exporting Department Information

The procedure below describes how to export department information.

➢ **To export department information:**

1. From the Actions drop-down list, on the Department Details screen, click **Export Departments List**.

Figure 4-63: Export Departments List



2. Select the type of Department List to be exported:
   - Active and Inactive Departments List
   - Active Departments List
   - Inactive Departments List
3. Click **Excel file** or **CSV file** as the format to export the Departments List.

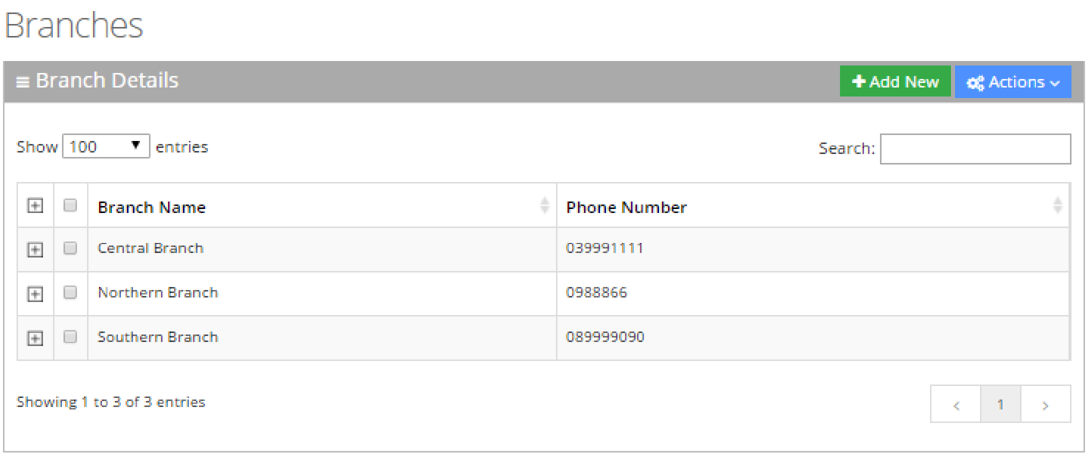
5 Managing Branches

This feature allows the customer to provide one single contact number for callers as a general entry point of information. This number will direct callers to the specific branch that is being requested or to the closest branch if the requested branch is not contactable.

The procedures below **describe** how to manage your branches.

Please note that Branches feature is only supported in Israel.

Figure 5-1: Managing Branches



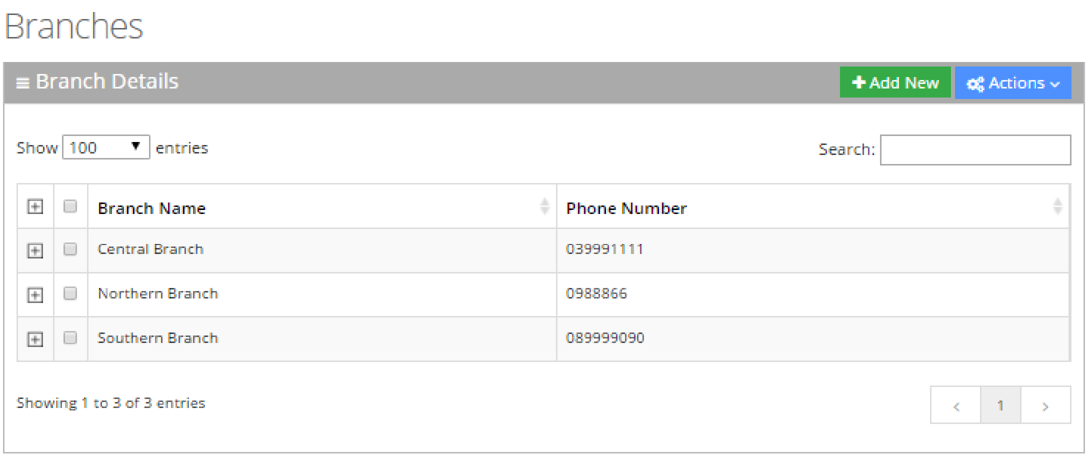
Adding a Branch

The procedure below describes how to add a branch.

➢ **To add a branch:**

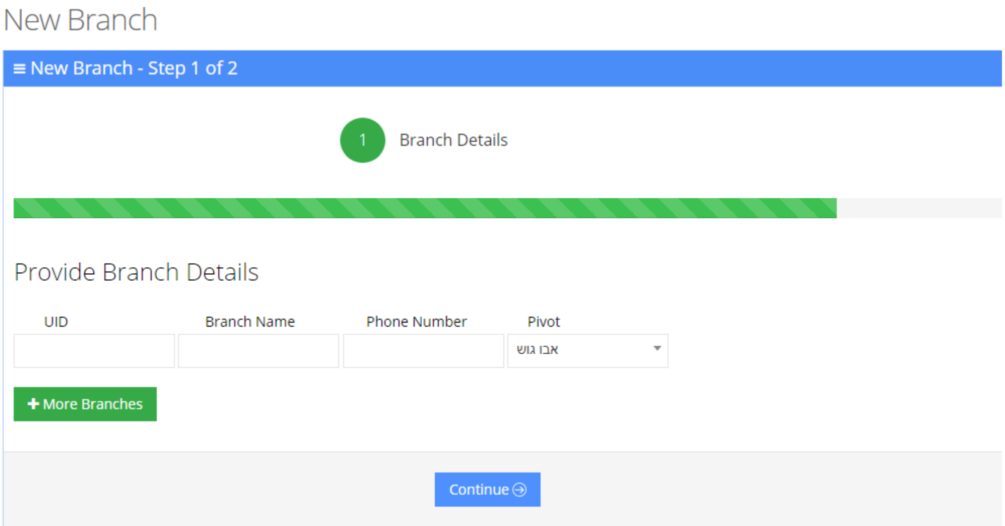
1. Open the Branch Details screen (**Branches** > **Branches List**); the following screen appears.

Figure 5-2: Adding a New Branch



2. Click **Add New**; the following screen appears:

Figure 5-3: New Branch

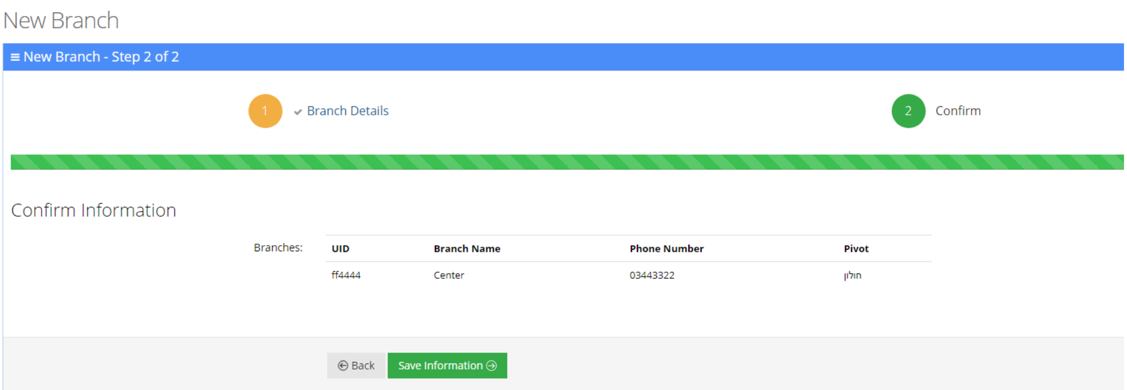


3. Under the **Provide Branch Details** group, enter the following:
   - UID
   - Branch Name
   - Phone Number
   - Pivot

Every User ID (UID) can either be a unique number or name, e.g., ABC123.

4. Click **Continue**.

Figure 5-4: Confirm Branch Information



5. Click **Save Information**; the new branch has been added.

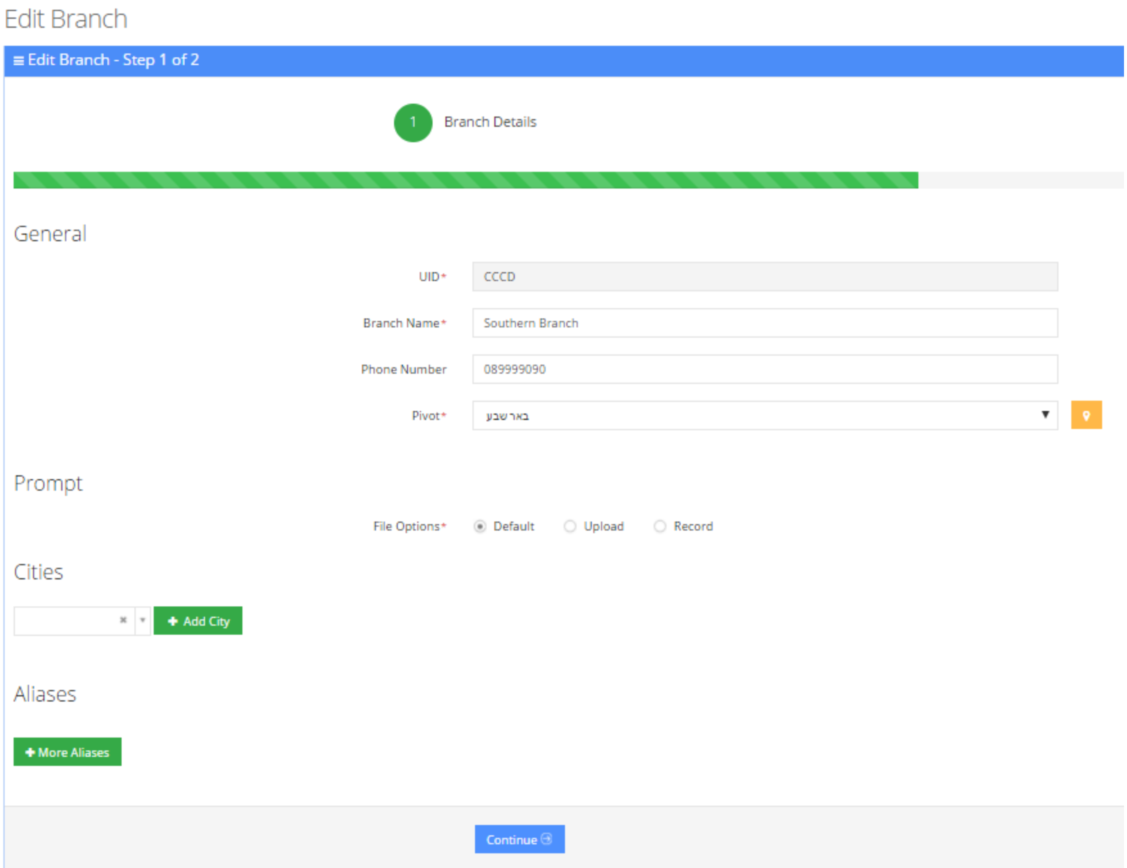
Editing a Branch

The procedure below describes how to edit a branch.

➢ **To edit a branch:**

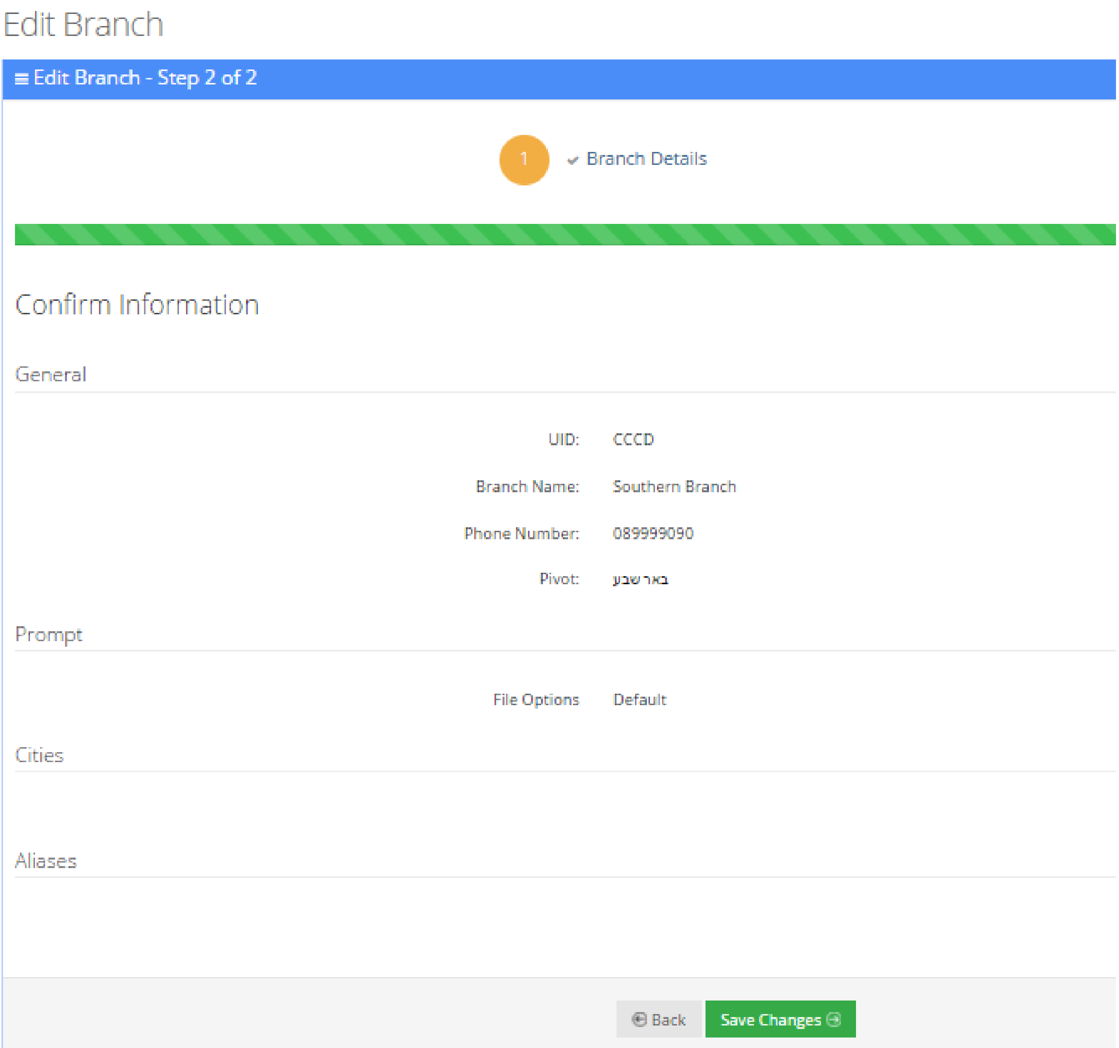
1. Open the Branch Details screen (**Branches** > **Branches List**).
2. Select the branch you wish to edit by enabling the **Branch** check box.
3. From the 'Actions' drop-down list, select **Edit Branch**; the following screen appears:

Figure 5-5: Edit Branch - Step 1



4. Make your changes to the appropriate fields and click **Continue**; the following screen appears:

Figure 5-6: Edit Branch - Step 2



5. Click **Save Changes**.

Mapping a City to a Branch

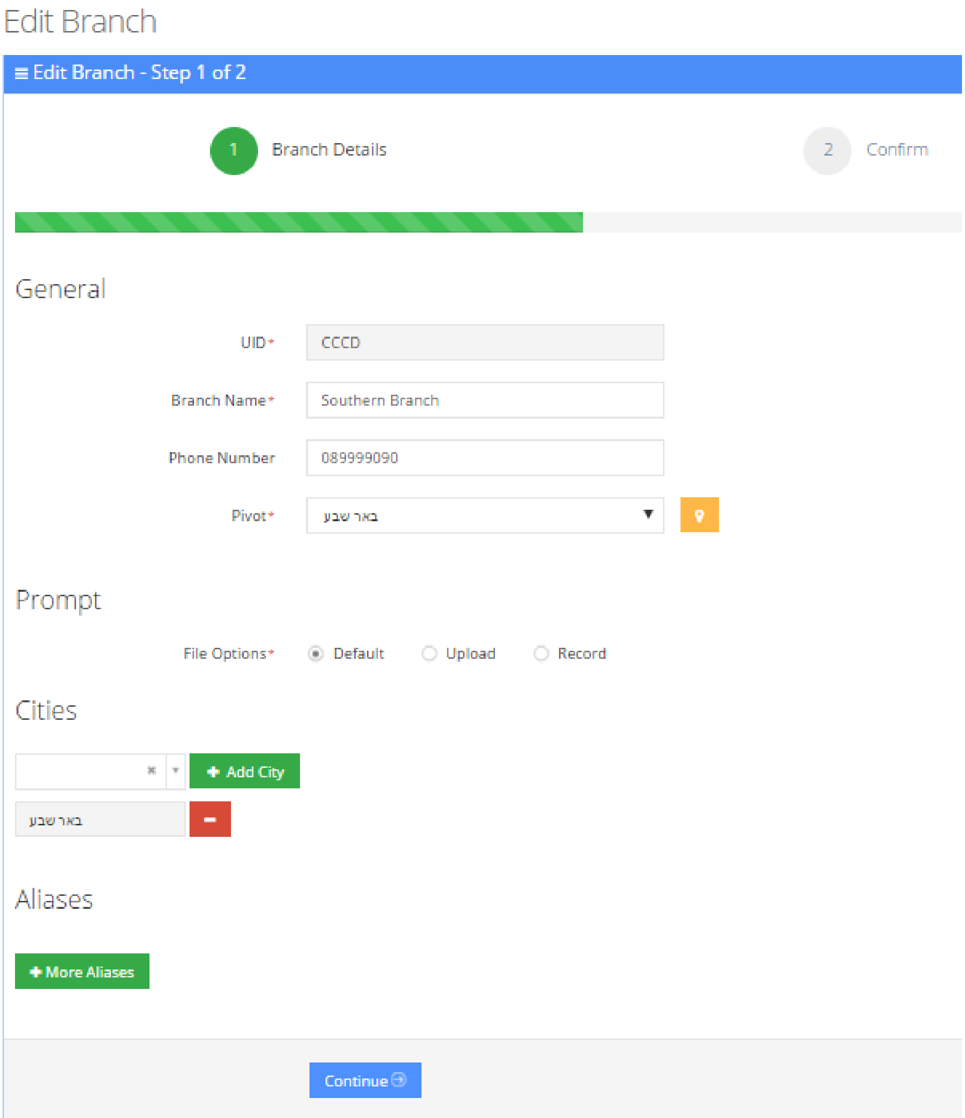
Once you have created a new branch (as described in Section Adding a Branch on page 67 on page Adding a Branch on page 67), you need to map cities to that branch.

➢ **To map a city to a branch:**

1. On the **Edit Branch – Step 1 of 2** screen, set the Pivot city. The Pivot city is the actual city where the branch is located.

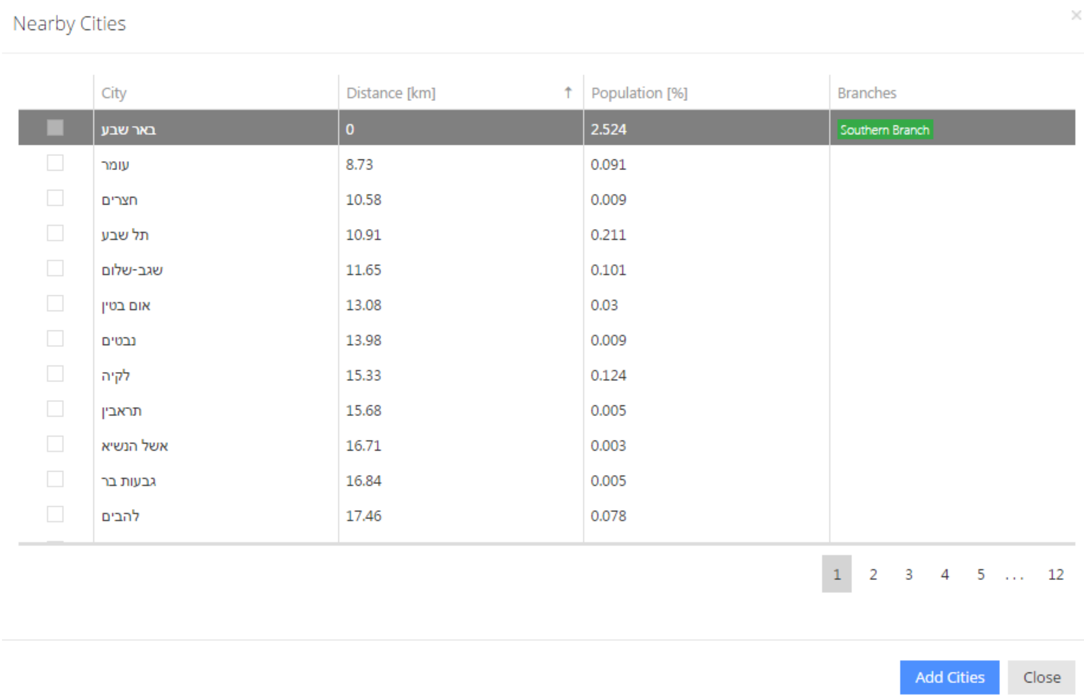
> ⚠ Setting the Pivot city is mandatory.

Figure 5-7: Map a City to a Branch



2. Click the **Find Near City** yellow icon next to the Pivot drop-down list, to view the nearby cities list and map the appropriate cities that need to be mapped to the specific branch; the Nearby Cities table appears:

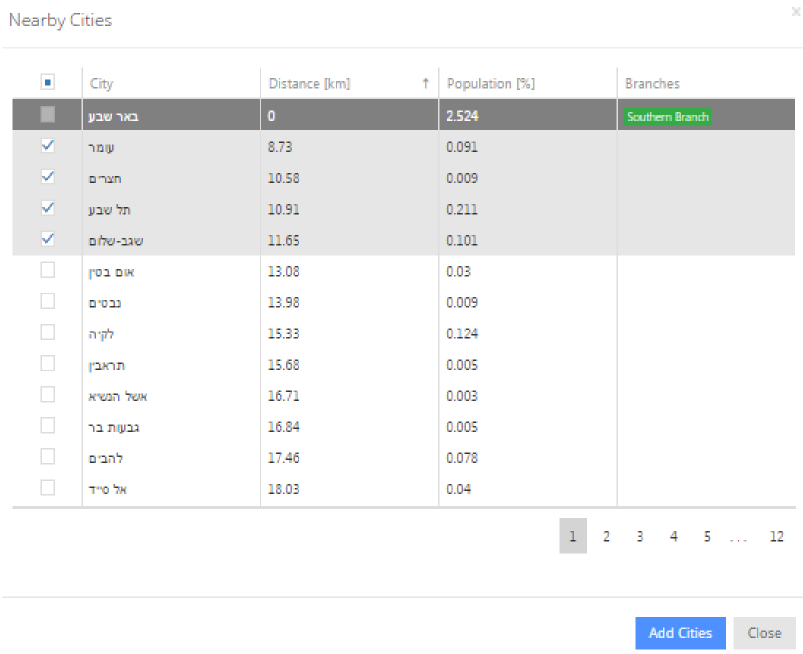
Figure 5-8: Nearby Cities



This screen displays nearby cities, their distance to the Pivot city, the population of that nearby city (in percentages) and which branch it is already mapped to.

3. You can sort this table by any one of the following columns:
   - City
   - Distance
   - Population
   - Branches
4. Select the check box of the cities that you wish to map to the branch.

Figure 5-9: Select Nearby Cities



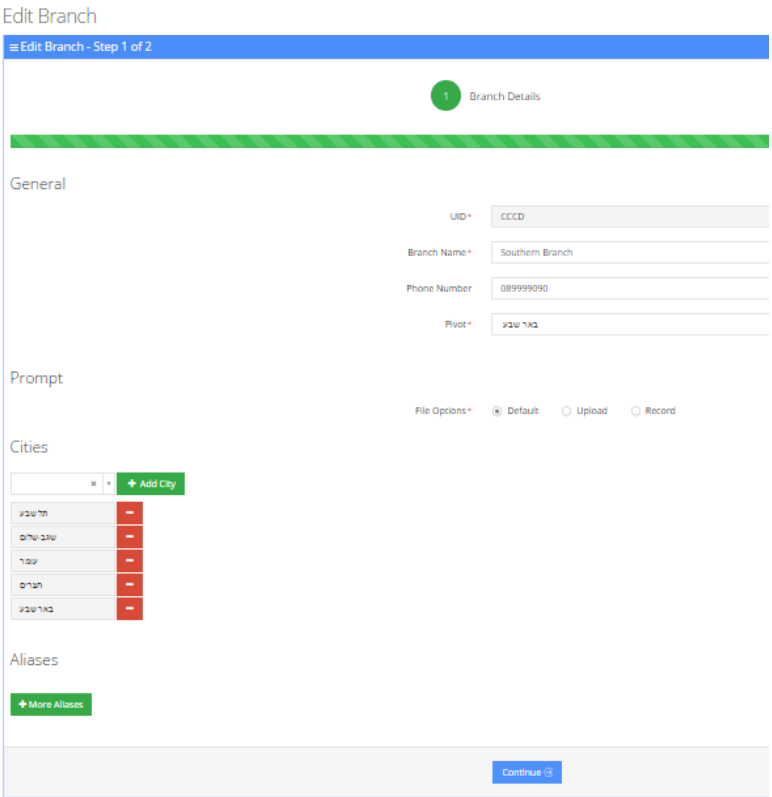
5. Click **Add Cities**, to map the selected cities to the branch.

6. On the **Edit Branch – Step 1 of 2** screen, scroll down to the **Cities** group.

7. You can also map cities to a branch from the 'Cities' drop-down list by selecting the appropriate cities that you want mapped to the specific branch, by clicking **+ Add City**.

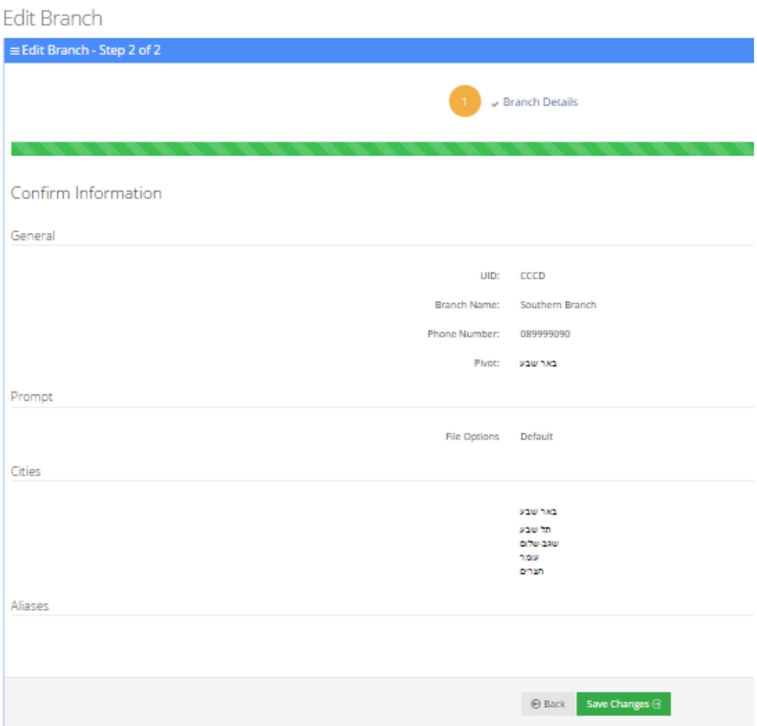
8. Repeat this process until all the cities you wanted mapped to the specific branch have been added.

Figure 5-10: Mapping Cities - Continue



9. Click **Continue**.

Figure 5-11: Mapping Cities – Save Changes



10. Click **Save Changes**.

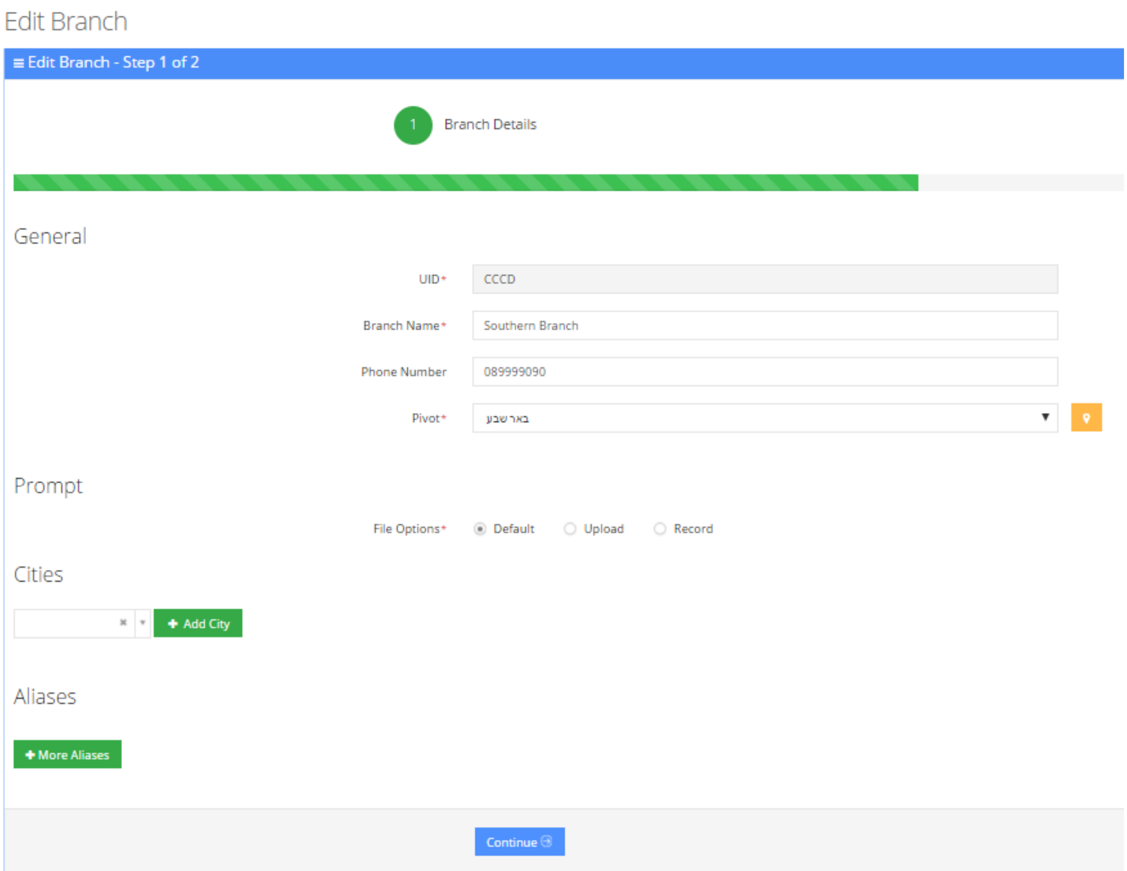
Configuring Branch Prompts

The procedure below describes how to configure a Branch audio prompt for the Voca service. You can use an existing default prompt, upload a prompt or record a new prompt.

➢ To use the default branch prompt:

1. Open the Department Details screen (**Branch** > **Branch List**).
2. Select the branch you wish to edit by enabling the **Branch** check box.
3. From the 'Actions' drop-down list, select **Edit Branch**; the following screen appears:

Figure 5-12: Edit Branch

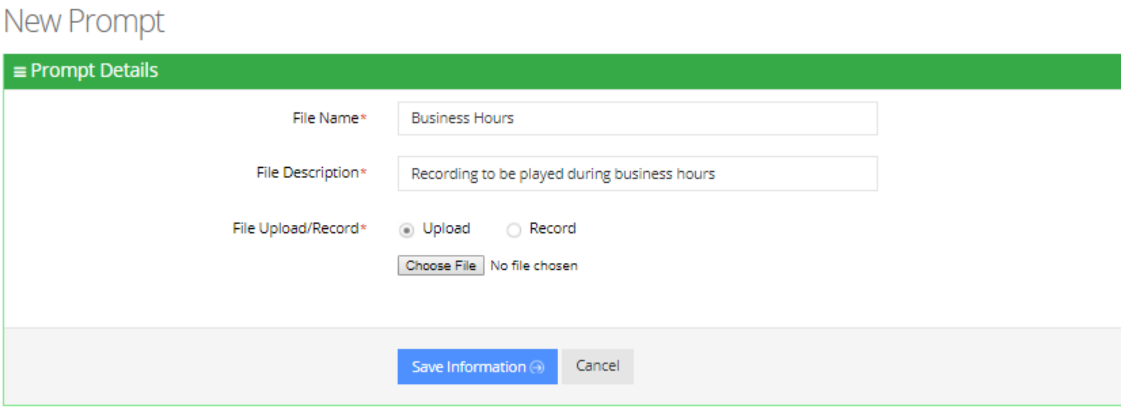


4. Under the Prompts group, select 'default' to use a pre-existing prompt.

➢ To upload a prompt:

1. Click the **Upload** option.

Figure 5-13: Upload Prompt Details



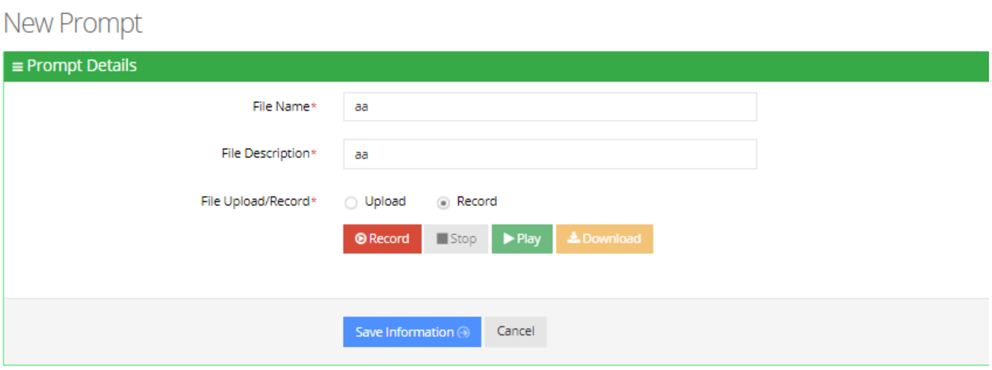
2. In the 'File Name' field, enter the audio file name.
3. In the 'File Description' field, enter a description of the prompt.
4. Enter the prompt details in the fields provided.
5. Click **Choose** to locate the audio file to be uploaded.
6. Click **Save Information** to complete the upload process.

The audio file must be in the following format - .wav file, with 16 Bit Resolution, mono, 8000Hz.

➢ To record a prompt:

1. Click Record, and then begin recording your prompt.

Figure 5-14: Record New Prompt Details



2. When finished recording, click **Stop**.
3. To replay the recent recording, click **Play**.
4. To save a copy of the recorded audio file, click **Download**.
5. Click **Save Information** to complete the recording process.

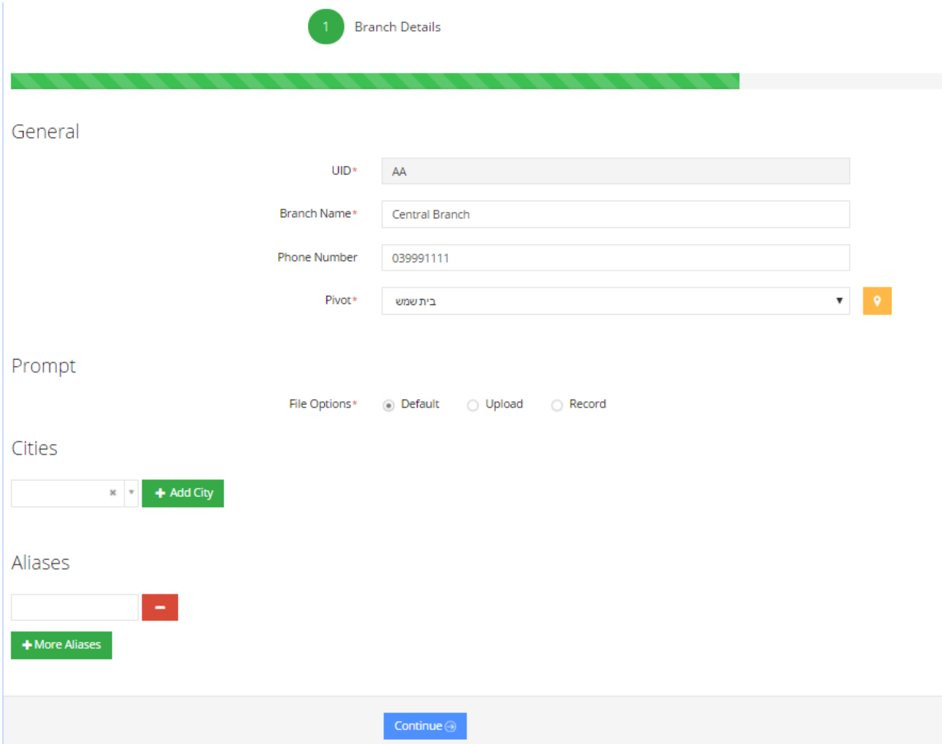
Creating an Alias for a Branch

An alias is another name for a branch, known or more familiar under another specified name. You can create an alias for a specified branch.

➢ To create an alias for a branch:

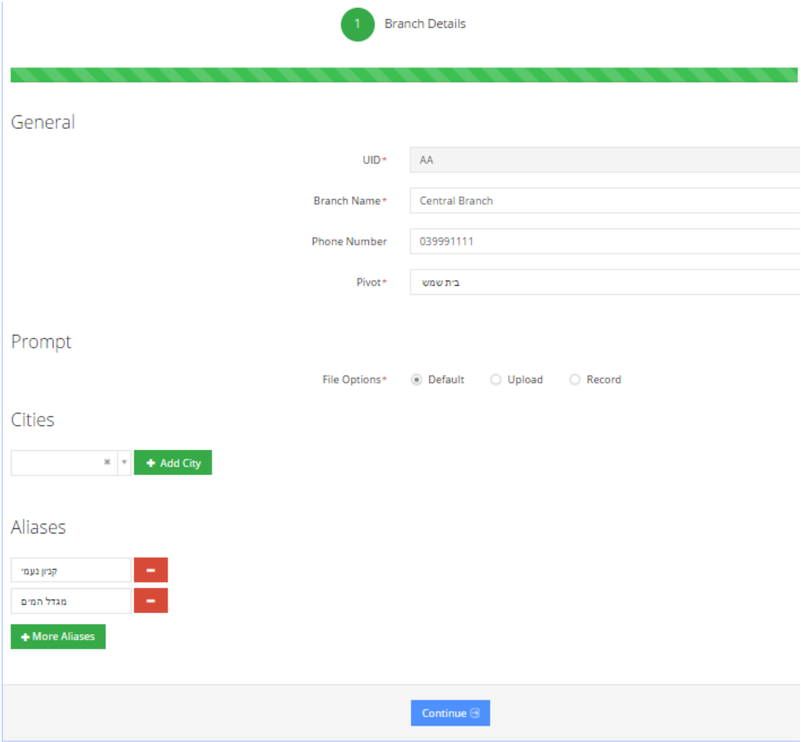
1. Open the Branch Details screen (**Branch** > **Branches List**).
2. Select the branch you wish to edit by selecting the **Branch** check box.
3. From the 'Actions' drop-down list, select **Edit Branch**.
4. Under the **Alias** group, click **+ More Aliases**; the following screen appears:

Figure 5-15: Create an Alias for a Branch



5. Enter the alias name(s).

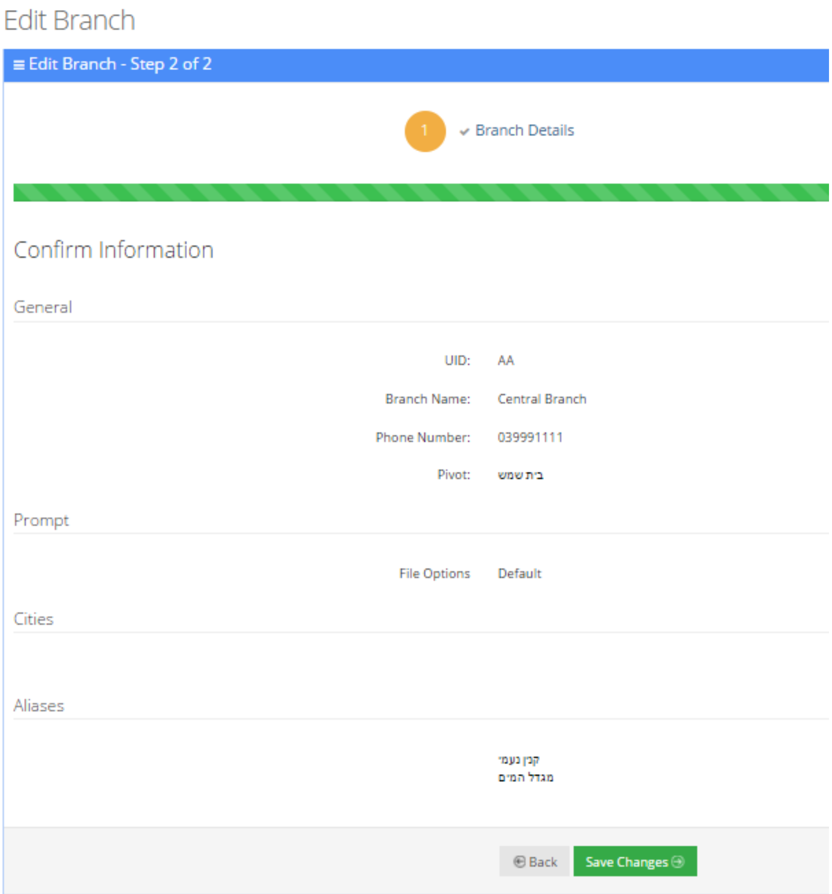
Figure 5-16: Create an Alias for a Branch - Continue



> ⚠ You can remove an alias by pressing the red "-" icon.

6. Click **Continue**; the following screen appears:

Figure 5-17: Create an Alias for a Branch - Save



7. Click **Save Changes**.

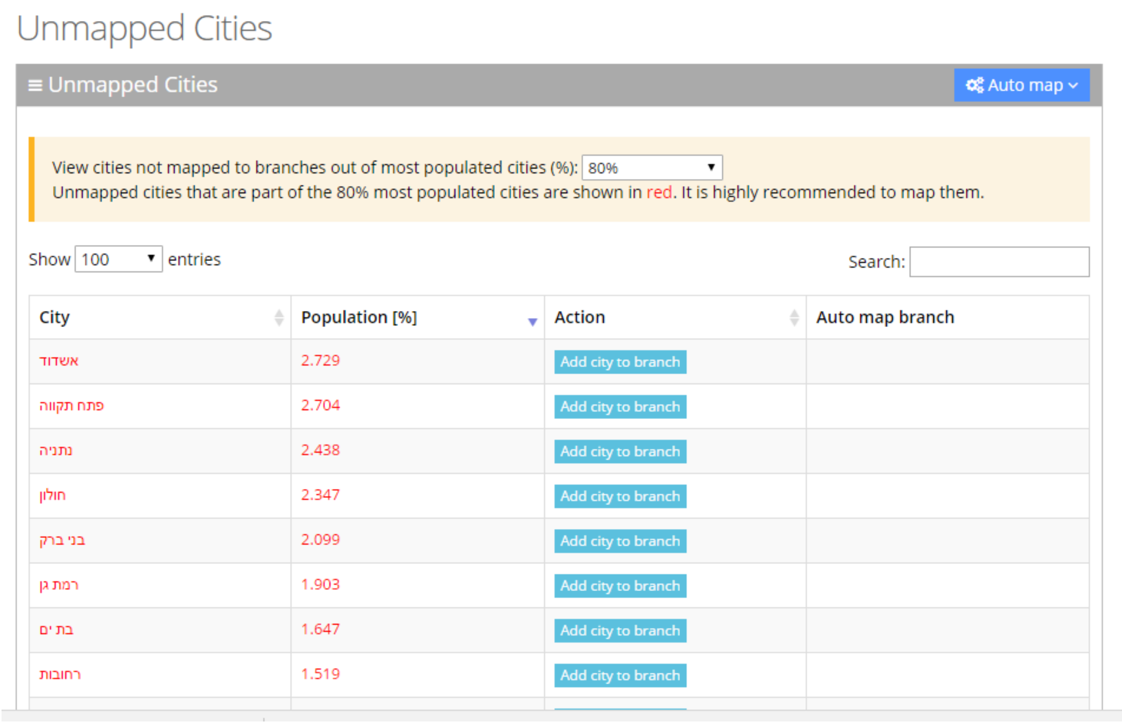
Mapping Unmapped Cities to Branches

The 'Unmapped Cities' menu option allows you to view cities that have not been mapped to branches, out of the most populated cities, so that they can be mapped. Unmapped cities that are part of the percentage selected, of the most populated cities, are shown in red. All cities should be mapped (See Mapping a City to a Branch on page 70).

Cities can be mapped either:

- Automatically
- Manually

Figure 5-18: Unmapped Cities



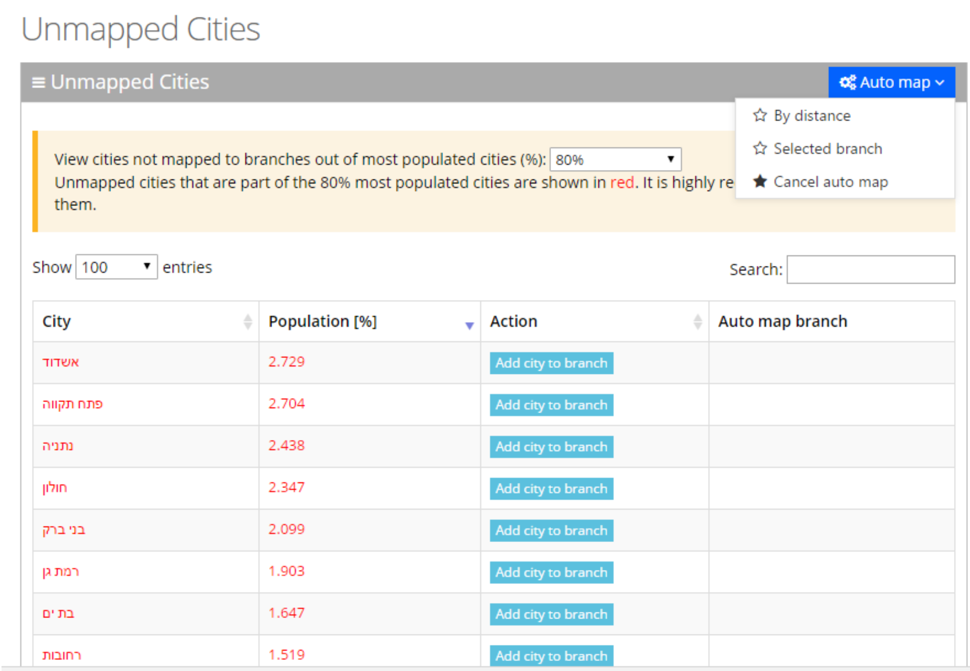
Mapping Cities Automatically to a Branch

To make the city mapping process more efficient, you can map cities automatically.

➢ **To map cities automatically:**

1. Click the **Auto map** drop-down list in the top right-hand corner of the screen; the following screen example appears:

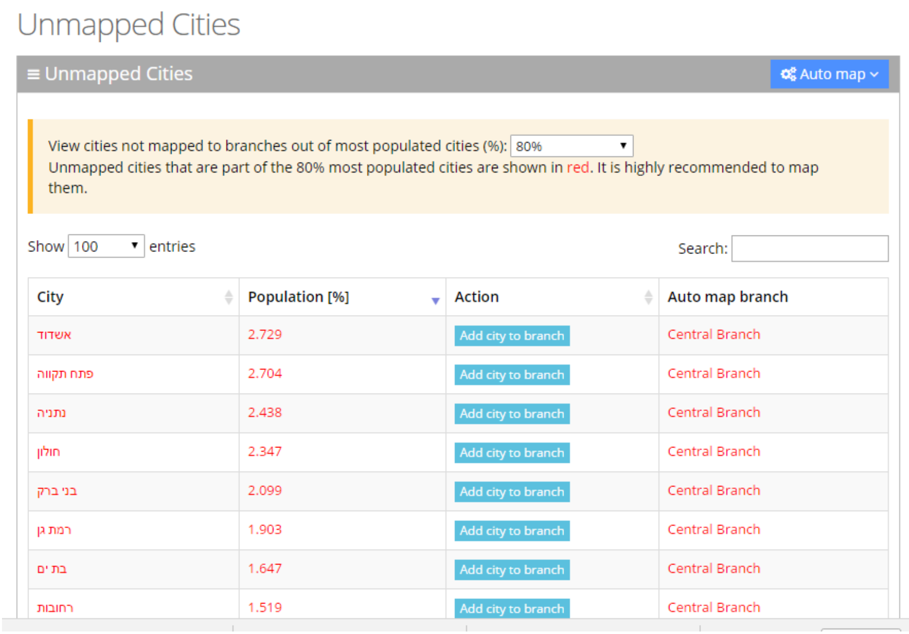
Figure 5-19: Unmapped Cities – Auto map Options



The 'Auto map' drop-down list contains three options:

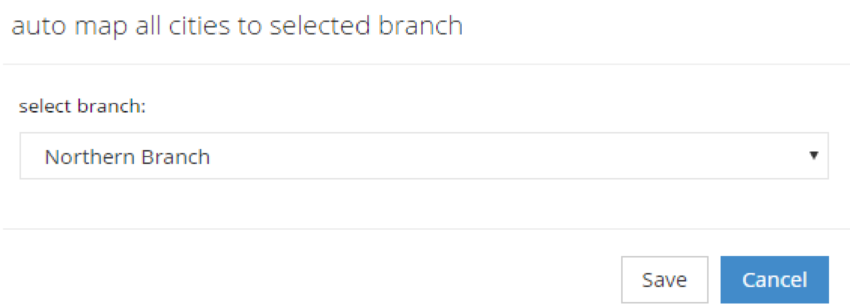
- **By distance:** This option enables all cities which are part of most populated cities (%) that were defined by the user (only the branches mark in red will auto-mapped) to be mapped automatically according to distance to the Pivot city. When this option is selected, the following example screen appears. This may take a few seconds to process.

Figure 5-20: Unmapped Cities – Auto Map Distance



- **Selected branch:** This option enables all cities which are part of most populated cities (%) that were defined by the user (only the branches mark in red will auto-mapped) to be mapped automatically to a selected branch. When you choose this option, select the branch you want all unmapped cities to be mapped to, and then click **Save**.

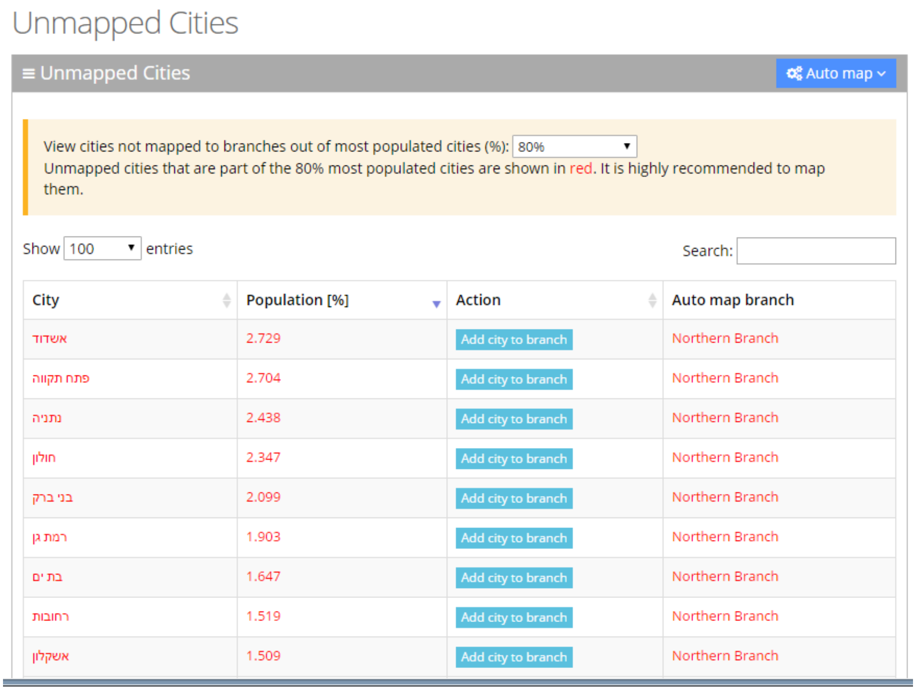
Figure 5-21: Unmapped Cities – Saving Selected Branch



From the 'Selected Branch' drop-down list, select the branch you want all unmapped cities to be mapped to, and then click **Save**.

This may take a few seconds to process. The following screen example appears:

Figure 5-22: Unmapped Cities – Select Branch



- **Cancel Auto map:** This option cancels the Auto map selections.

> For performance and accuracy of the service, it is highly recommended to use the automatic mapping of cities. Only the branches marked in red will be auto-mapped.

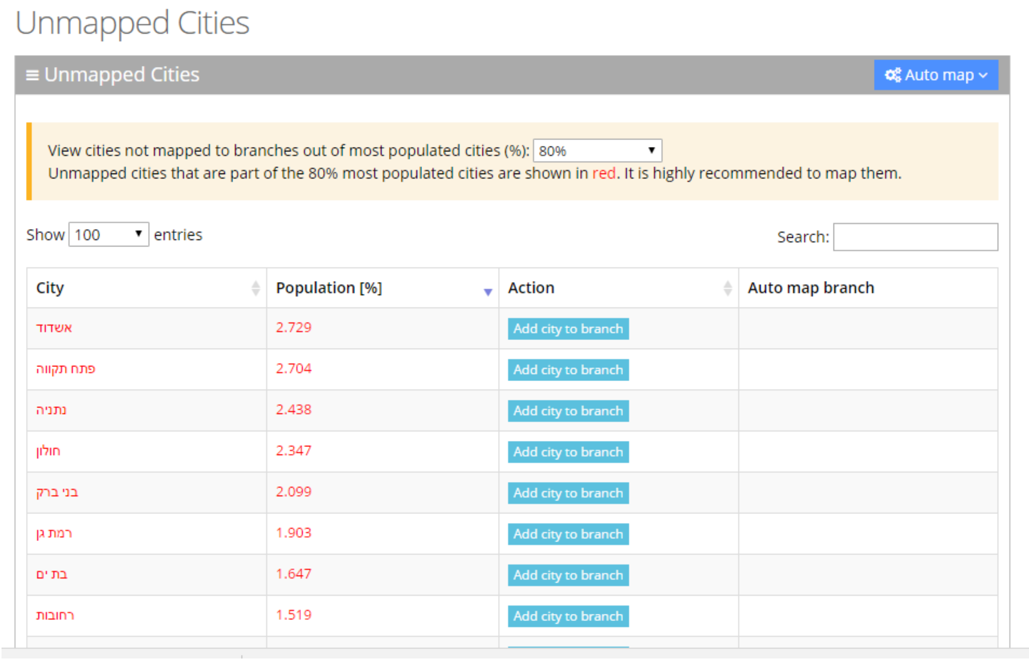
Mapping Cities Manually to Branches

It is also possible to map a city manually to branches.

➢ **To map a city manually to a branch:**

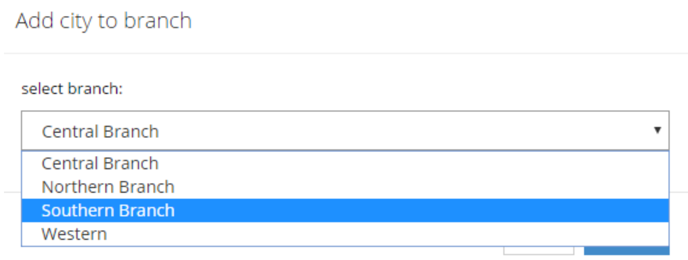
1. Select the city you want manually map, from the Unmapped Cities screen.
2. Click **Add city to branch**.

Figure 5-23: Unmapped Cities- Manual Update



3. Select the branch you want to map to.

Figure 5-24: Unmapped Cities- Select Branch Manually



4. Click **Save**.
5. The following message appears in the upper right-hand screen - "The city was added to the branch". The city that was mapped no longer appears on the Unmapped Cities screen.

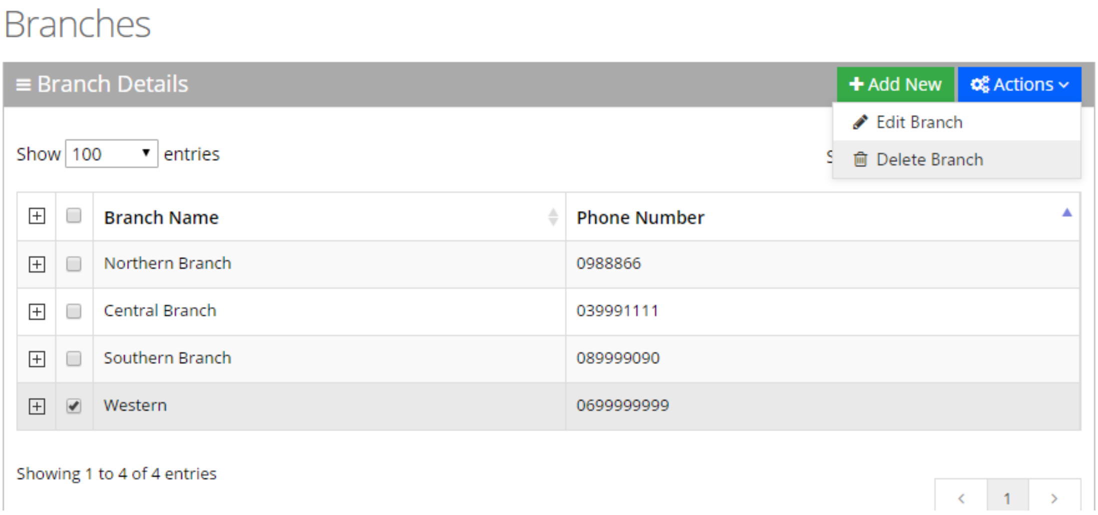
Deleting a Branch

The procedure below describes how to delete a branch.

➢ **To delete a branch:**

1. Open the Branch Details screen (**Branches** > **Branches List**).
2. Select the branch you wish to delete by enabling the branch check box.
3. From the ‘Actions’ drop-down list, select **Delete Branch**; the following screen appears:

Figure 5-25: Delete a Branch



4. The following message appears: "Are you sure you want to delete the selected branch?"
5. Click **OK**.

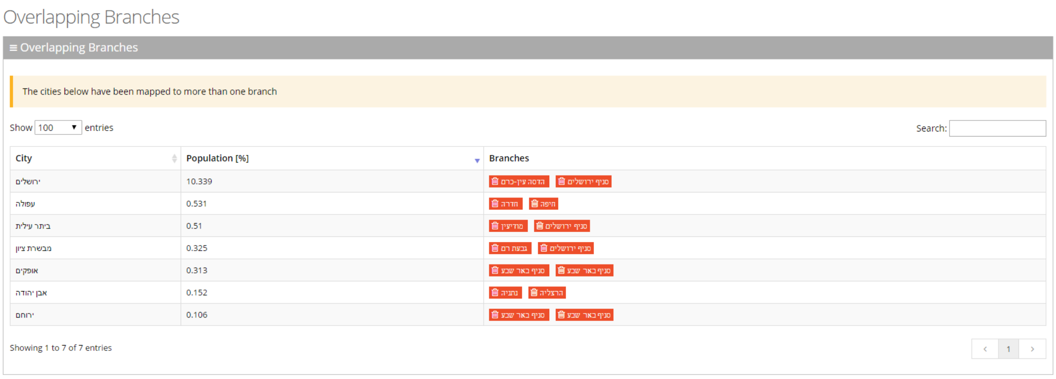
Managing Overlapping Branches

The procedure below describes how to manage overlapping branches. Cities may be mapped to more than one branch. So, when a caller says the name of one of the branches, the system will respond with the list of overlapped branches. The caller is then able to choose between them.

➢ **To manage overlapping branches:**

1. Open the Overlapping Branches screen (**Branches** > **Overlapping Branches**); the following example screen appears:

Figure 5-26: Overlapping Branches Example

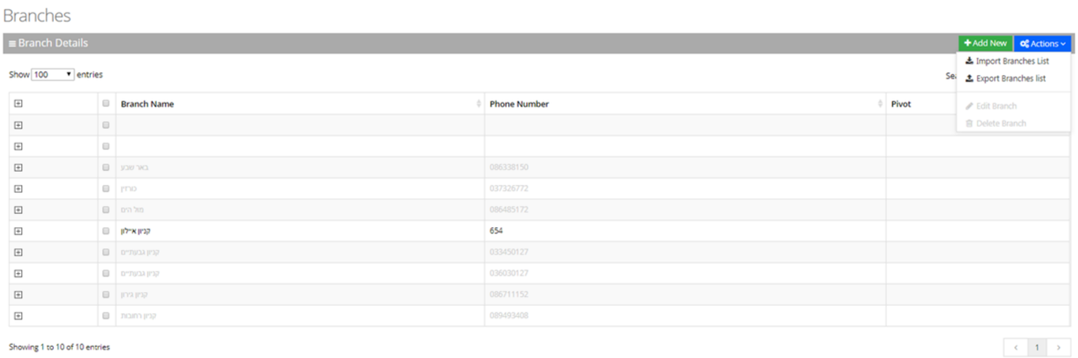


2. To delete a mapped branch, click on the branch that you no longer want the city to be mapped to.
3. A message appears confirming that you want to delete a branch.
4. Click **OK** to confirm.

Importing/Exporting Branch List

The procedure below describes how to import and export CSV and Excel files containing Branch lists. When using CSV files, we recommend you use Notepad++ and save files in UTF-8 encoding format.

Figure 5-27: Import/Export Branch List



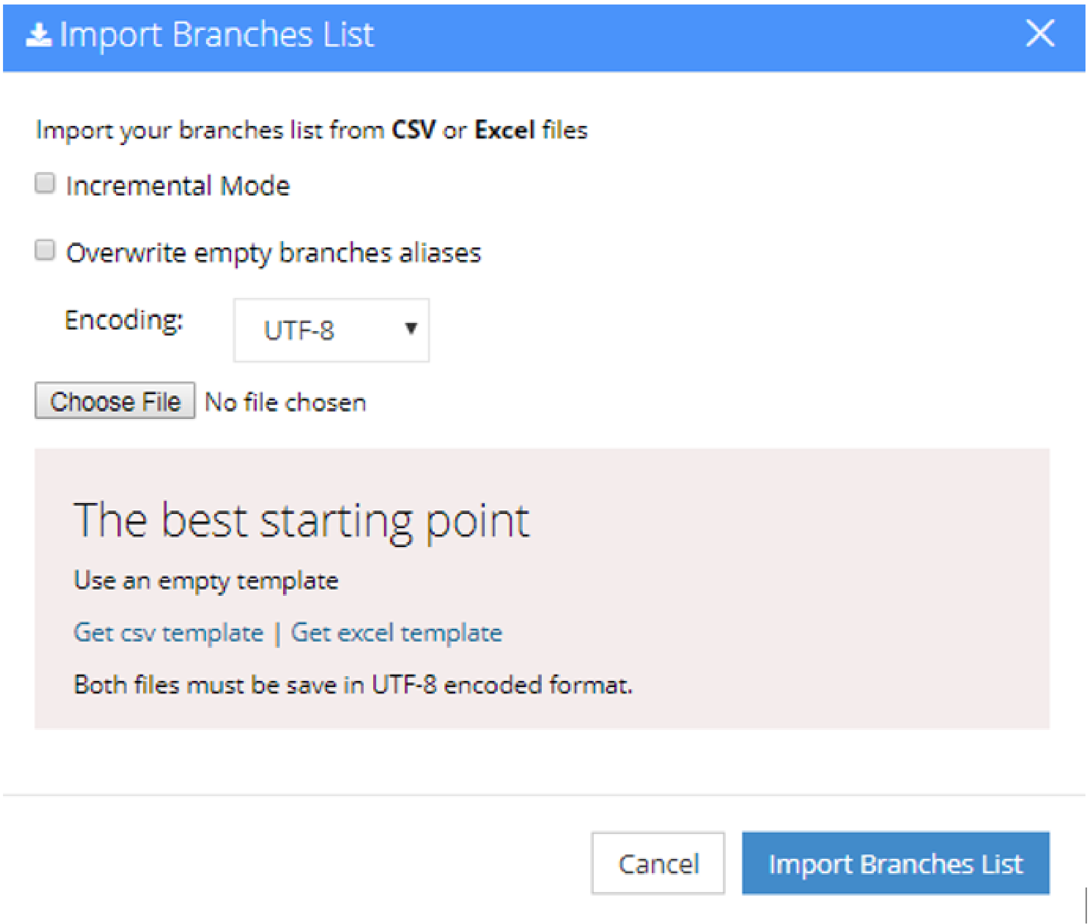
Importing Branch Information

The procedure below describes how to import branch information.

➢ **To import branch information:**

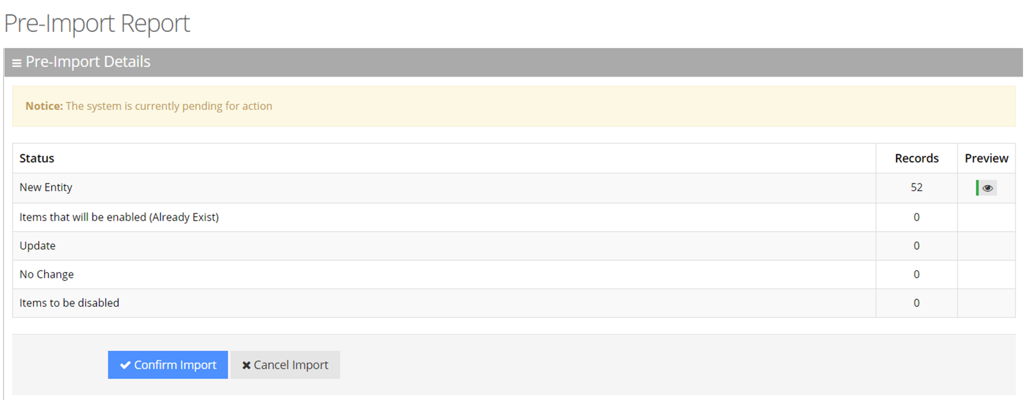
1. From the Actions drop-down list, on the Branch Details screen, click **Import Branches List**.

Figure 5-28: Import Branches List



2. If you select the 'Incremental Mode' check box, only the records that you are importing are active in your Branches List. All pre-existing records are disabled.
3. If you select the 'Overwrite empty branches aliases' check box, all empty branches aliases in the imported file are overwritten.
4. Select **Encoding** type. Recommended and default value is **UTF-8**.
5. Click **Choose File** and select the file to be imported.
6. Click **Import Branches List**; the following appears:

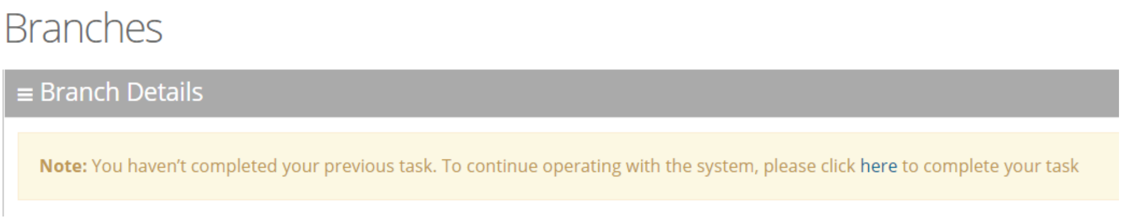
Figure 5-29: Pre-Import Report



This report lists the status of the branches to be imported. In this example, 52 new branches are ready to be imported. Clicking the Preview icon, displays these new branches before they are imported.

1. Click **Confirm Import** to import the branches. If you wish to cancel the import process, click **Cancel Import**.
2. If you do not click **Confirm Import/Cancel Import** or switch to another tab, the actual import will be pending and all branches will be disabled. The following message appears:

Figure 5-30: Uncompleted Branch Import



3. You can return to the **Confirm Import** or **Cancel Import** processes by clicking on the here link.
4. The CSV to be imported should contain the following:
   - UID (mandatory)
   - Branch name
   - Branch Phone number
   - Aliases - Aliases separated by ";"

It is highly recommended that the CSV file will be saved in UTF-8 encoding format (Unicode Text). Use Notepad++ to view CSV files.

5. The Excel file can be imported according to the following layout:

Figure 5-31: Branch Excel File Layout

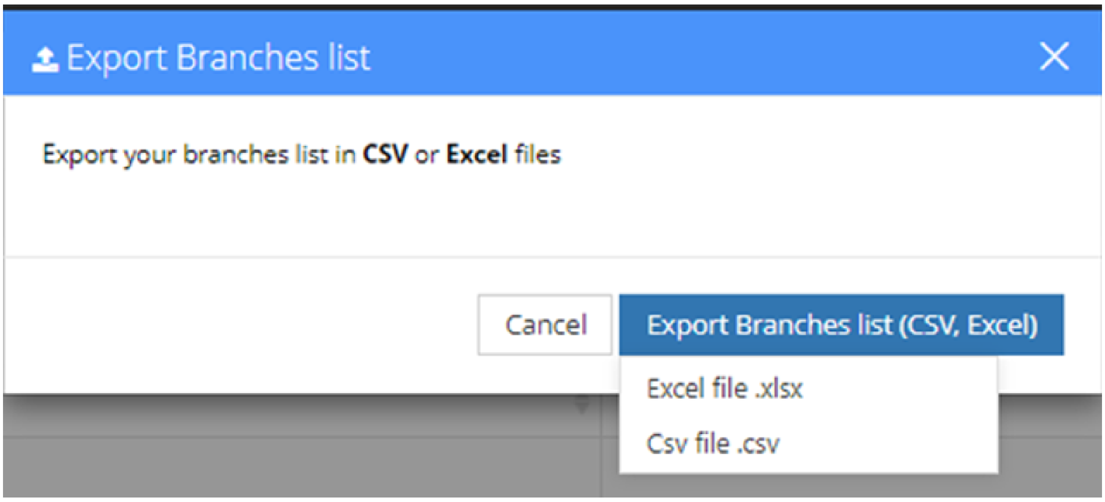
A	B	C	D
UID	Branch Name	Phone Number	Aliases
1111	New York	1001	Apple City

Exporting Branch Information

The following information describes how to export branch information.

➢ **To export contact information:**

1. From the 'Actions' drop-down list, on the Branch Details screen, click Export Branches List.



2. Click **Excel file** or **CSV file**.

6 Producing Reports

The procedures below describe how to generate different reports from the Voca system. You can generate the following types of reports:

- IVR reports
- Branch reports
- App reports

IVR Reports

You can generate the following Interactive Voice Response (IVR) reports:

- **Overall Performance** – Displays the actual performance of calls made
- **Drill-down** – Displays details of each call made
- **Call Date** – Displays the call performance on given dates
- **Call Hour** – Displays call performance by the hour on one specific day
- **Requested Contacts** – Displays a summary of Contacts that were requested during Voca sessions and the transfer results
- **Requested Departments** – Displays a summary of Departments that were requested during Voca sessions and the transfer results
- **Other Reports** – Used for analyzing calls and finding problematic states within the call flow

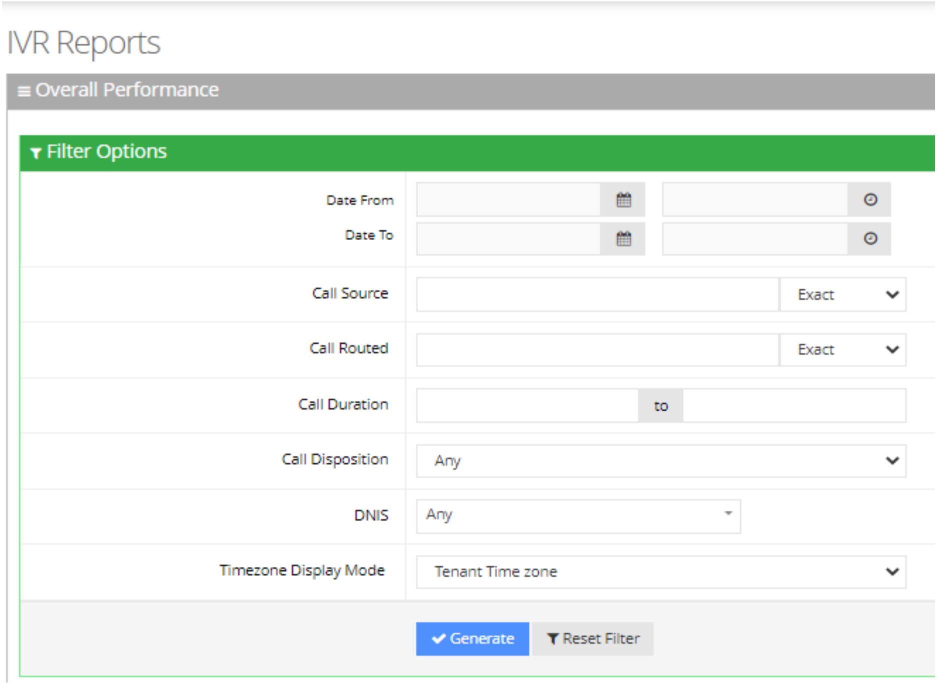
Overall Performance Report

The procedure below describes how to generate an Overall Performance report.

➢ **To generate an Overall Performance report:**

1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Overall Performance**); the following screen appears.

Figure 6-1: Overall Performance IVR Filter Options



2. Select the appropriate filter fields:

- **Date From:** Defines the From Date from which the calls were made.
- **Date To:** Defines the To Date that calls were made till.
- **Call Source:** Defines the source that calls were made from.
- **Call Routed:** Defines the destination that calls were routed to.
- **Call Duration:** Defines the call duration.
- **Call Disposition:** Defines the disposition of the call. It can be any of the following values:
  - Any: All dispositions as listed below
  - Transfer: Calls that were transferred
  - Disconnect: Calls that disconnected before the transfer; e.g., calls canceled by the caller after listening to the prompt. It might be that an attended transfer was not successful and then the caller canceled the call.
  - Operator: Transfer to Operator, e.g., when the caller does not have the permission to call the requested contact (phone type).
  - Operator DTMF: Calls that were transferred to the Operator, due to the caller pressing “0” in the Speech menu.
  - Operator at Confirmation: Calls that were transferred to the Operator, due to missing confirmation before transferring the call.
  - Early Disconnect: Calls that were canceled by the caller before providing spoken input.

- Transfer Fail: Transfer to destination failed.
- DTMF Transfer: Caller dialed number during speech recognition to be transferred to a specific extension.
- Operator Request: Caller said “Operator” during speech recognition, to be transferred to the Operator.
- Call Started: Script execution failed. Error in Communication Portal software.
- DNIS Not Allowed: DNIS is not configured in one of the flows.
- Operator Transfer Fail: Transfer to the operator failed.
- Operator IVR Timeout:
- SMS Sent: Calls that resulted in successfully sending a SMS.
- Duplicate Name and Transfer to Operator: Destination was recognized but due to duplicate names the caller was transferred to the Operator.
- Not at Working Hours: Calls reaching the service during out of working hours.
- Max Call Limit: This limit is reached when the maximum number of concurrent calls exceeds the number of Voca licenses originally allocated to the designated service. This happens when the service is defined using the Web Administrator with N number of licenses (concurrent calls). The N+1 call that reaches the Voca system is rejected by the Voca service with SIP Error 603.
- Operator is Disabled: Call should be transferred to Operator, but Operator is disabled.
- Operator 2nd language: IVR menu option for second language was selected.
- SMS Error: Sending of SMS failed.
- Missed Calls Notification: Missed call notification was sent to the called contact.
- Missed Calls Notification Failed: Sending a missed call notification to the called contact failed.

- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Timezone Display Mode:** There are three possible options:
  - Tenant time zone - The data in the report is displayed based on the tenant configured timezone.
  - Flow time zone - The data in the report is displayed based on the timezone configured under the **Flow Menu** settings.
  - Local time zone (Web) - The data in the report is generated based on the browser local timezone.

3. Click **Generate** to view the report output or Reset Filter to reset the filter values.

4. Leaving the filter empty means don't filter on that field. It is recommended to set the Start Date and End Date filters, to shorten the report processing time.

The figure below displays an example of the Overall Performance IVR report.

Figure 6-2: Overall Performance IVR Report Example

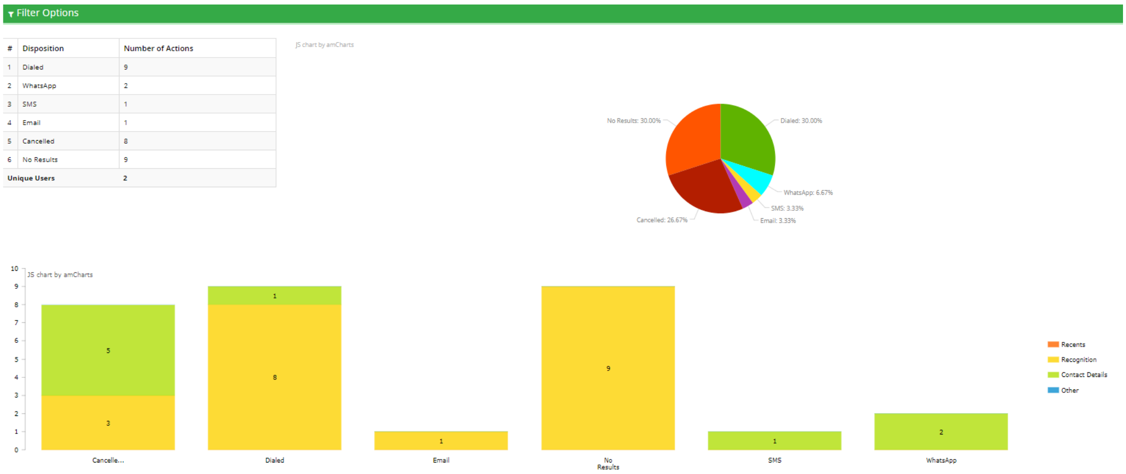


Table 6-1: Overall Performance IVR Report Description

Report Column	Description
Disposition	Displays the disposition of the call.
Total Calls	Displays the total number of calls each disposition.

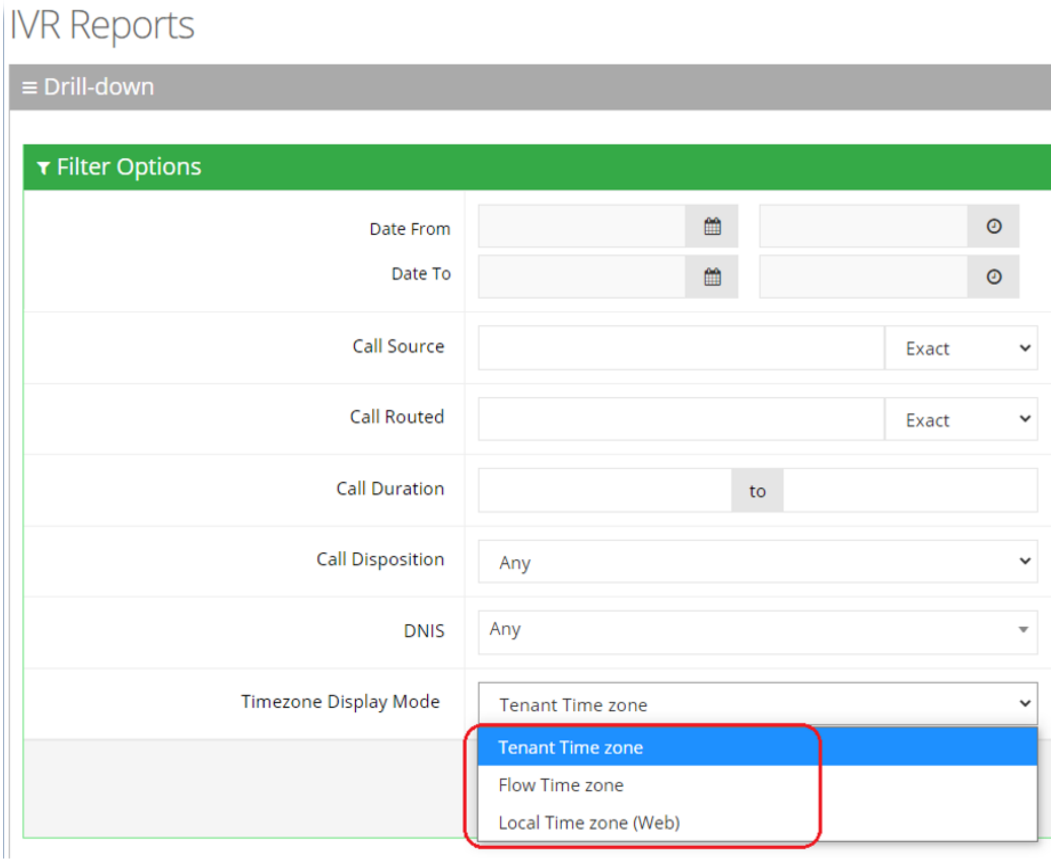
Drill-down Report

The procedure below describes how to generate a Drill-down report.

➢ To generate a Drill-down report:

1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Drill-down**; the following screen appears.

Figure 6-3: Drill-down IVR Filter Options



2. Select the appropriate filter fields:
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made till.
   - **Call Source:** Defines the source that calls were made from.
   - **Call Routed:** Defines the destination that calls were routed to.
   - **Call Duration:** Defines the call duration.
   - **Call Disposition:** Defines the disposition of the call. It can be any of the following values:
     - Any
     - Disconnect
     - Call Started
     - Transfer
     - Transfer Fail
     - Operator
   - **DNIS:** Defines the leading phone number that is called to access Voca. You can select the appropriate value from the drop-down list.

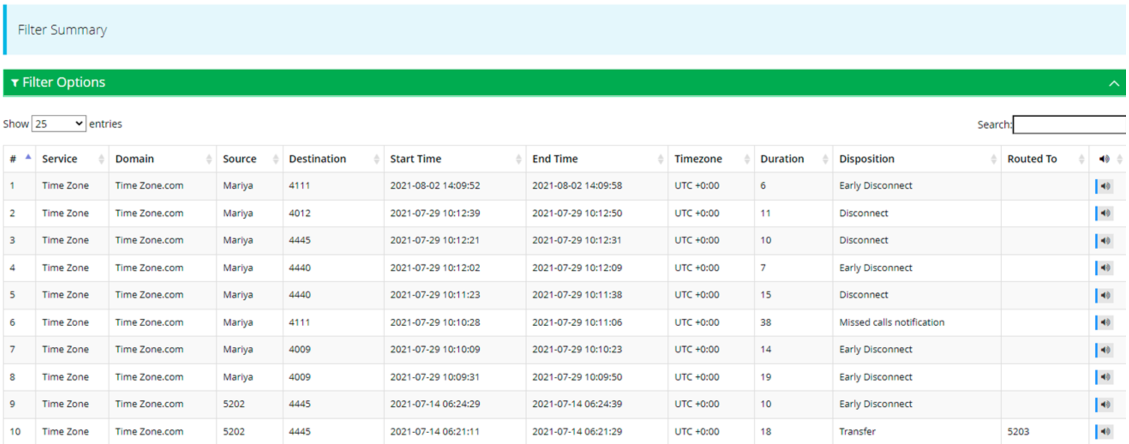
- **Timezone Display Mode:** Select the timezone to be shown in the report:
  - Tenant Time zone: The data in the report is displayed based on the tenant configured timezone.
  - Flow Time zone: The data in the report is displayed based on the timezone configured under the **Flow Menu** settings.
  - Local Time zone (Web): The data in the report is generated based on the browser local timezone.

3. Click one of the following:
   - Generate to view the report output
   - Export CSV to export the report is CSV format
   - Reset Filter to reset the filter values

> ⚠ Leaving the filter empty means don't filter on that field. It is recommended to set the Start Date and End Date filters, to shorten the report processing time.

The figure below displays an example of the Drill-down IVR report.

Figure 6-4: Drill-down IVR Report Example



Filter Summary

Filter Options

Show 25 entries Search:

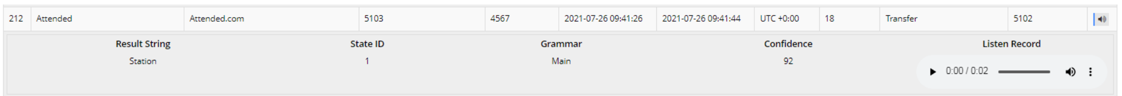
#	Service	Domain	Source	Destination	Start Time	End Time	Timezone	Duration	Disposition	Routed To	
1	Time Zone	Time Zone.com	Mariya	4111	2021-08-02 14:09:52	2021-08-02 14:09:58	UTC +0:00	6	Early Disconnect		
2	Time Zone	Time Zone.com	Mariya	4012	2021-07-29 10:12:39	2021-07-29 10:12:50	UTC +0:00	11	Disconnect		
3	Time Zone	Time Zone.com	Mariya	4445	2021-07-29 10:12:21	2021-07-29 10:12:31	UTC +0:00	10	Disconnect		
4	Time Zone	Time Zone.com	Mariya	4440	2021-07-29 10:12:02	2021-07-29 10:12:09	UTC +0:00	7	Early Disconnect		
5	Time Zone	Time Zone.com	Mariya	4440	2021-07-29 10:11:23	2021-07-29 10:11:38	UTC +0:00	15	Disconnect		
6	Time Zone	Time Zone.com	Mariya	4111	2021-07-29 10:10:28	2021-07-29 10:11:06	UTC +0:00	38	Missed calls notification		
7	Time Zone	Time Zone.com	Mariya	4009	2021-07-29 10:10:09	2021-07-29 10:10:23	UTC +0:00	14	Early Disconnect		
8	Time Zone	Time Zone.com	Mariya	4009	2021-07-29 10:09:31	2021-07-29 10:09:50	UTC +0:00	19	Early Disconnect		
9	Time Zone	Time Zone.com	5202	4445	2021-07-14 06:24:29	2021-07-14 06:24:39	UTC +0:00	10	Early Disconnect		
10	Time Zone	Time Zone.com	5202	4445	2021-07-14 06:21:11	2021-07-14 06:21:29	UTC +0:00	18	Transfer	5203	

Table 6-2: Drill-down IVR Report Description

Report Column	Description
Customer	Displays the customer name.
Domain	Displays the domain name.
Source	Displays the phone number the call was made from.
Destination	Displays the destination phone number.
Start Time	Displays the start time of the call adjusted to the timezone selected in the

Report Column	Description
	filter.
End Time	Displays the end time of the call adjusted to the timezone selected in the filter.
Timezone	Displays the relevant timezone according to the option selected in the filter.
Duration	Displays the duration of the call.
Disposition	Displays the disposition of the call.
Routed To	Displays the number of where the call has been routed to.
	Opens the CDR and displays more information, including a recording of the call.

Call Details information is displayed for each call. If recognitions where made on a particular call, the recognition results (one or more) are shown. When you display the information, the following screen appears:



Each recognition includes the following:

Field	Description
Result string	Displays the analyzed result returned from the ASR.
State ID	Displays the ID that specifies the step within the call that the recognition was made.
Grammar	Displays the grammar used (e.g., Main, Disambiguation)
Confidence	Displays the confidence level of the ASR returned for the result. If the confidence level is below a specific threshold, the recognition is rejected and the caller is prompted to request the destination again (based on the service configuration). For more information on the relevant confidence threshold, please consult with AudioCodes Support.
Listen Record	Displays the recording details for the recognition.

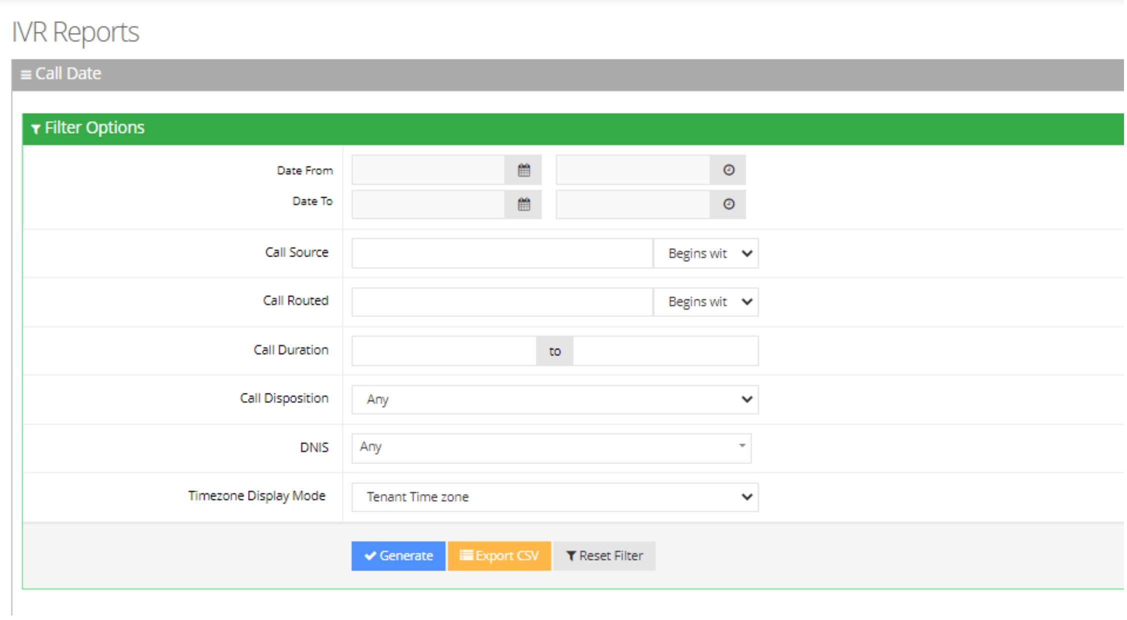
Call Date Report

The procedure below describes how to generate a Call Date IVR report.

➢ **To generate a Call Date IVR report:**

1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Call Date**); the following screen appears.

Figure 6-5: Call Date IVR Filter Options



2. Select the appropriate filter fields:
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made till.
   - **Call Source:** Defines the source that calls were made from.
   - **Call Routed:** Defines the destination that calls were routed to.
   - **Call Duration:** Defines the call duration.
   - **Call Disposition:** Defines the disposition of the call. It can be any of the following values:
     - Any
     - Transfer
     - Disconnect
     - Operator
     - Operator DTMF
     - Operator at Confirmation
     - Early Disconnect

  - Transfer Fail
  - DTMF Transfer
  - Not Found
  - Operator Request
  - Call Started
  - DNIS Not Allowed
  - Operator Transfer Fail
  - IVR Timeout
  - Operator IVR DTMF
  - SMS
  - Duplicate Name and Transfer to Operator
  - Not at Working Hours
  - DTMF

- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Timezone Display Mode:** Select the timezone to be shown in the report:
  - Tenant Time zone: The data in the report is displayed based on the tenant configured timezone.
  - Flow Time zone: The data in the report is displayed based on the timezone configured under the **Flow Menu** settings.
  - Local Time zone (Web): The data in the report is generated based on the browser local timezone.

3. Click one of the following:
   - Generate to view the report output.
   - Export CSV to export the report is CSV format.
   - Reset Filter to reset the filter values.

The figure below displays an example of the Call Date IVR report. The bar graph shows the number of calls on a given date. The green graph shows peak currency on a given date.

Figure 6-6: Call Date IVR Report Example

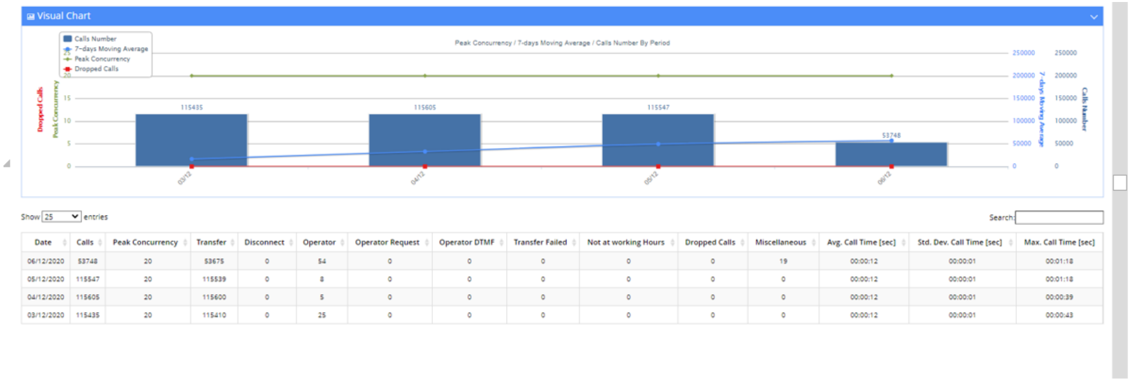


Table 6-3: Call Date IVR Report Description

Report Column	Description
Date	Displays the date.
Calls	Displays the number of calls.
Peak Concurrency	Displays the maximum number of concurrent calls the system held for a specific period of time.
Transfer	Displays the number of transferred calls.
Disconnect	Displays the disconnected calls.
Operator	Displays the number of calls moved to the operator for some reason (not Operator Requested or Operator DTMF).
Operator Request	Displays the number of calls moved to the Operator. The user was asked by voice to move the call to the Operator.
Operator DTMF	Displays the number of calls moved to the Operator because the user pressed the DTMF to move the call to the Operator.
Transfer Fail	Displays the number of calls that failed to be transferred.
Not at Working Hours	Displays the number of calls that entered the system, outside of the working hours.
Dropped Calls	Displays the number of calls dropped by the Media Gateway module when it exceeds the number of the concurrent channel license capacity. This deposition parameter represents the dropped calls for the past day. The calls are dropped when the Media Gateway module, which controls the total number of IVR ports, is configured with X number of channels. The X+1 call is rejected by the Media Gateway with SIP Error 404.

Report Column	Description
Miscellaneous	Displays the number of calls that do not come under other dispositions in this report.
Average Call Time (sec)	Displays the average call time in seconds.
STD Dev Call Time (sec)	Displays the standard deviation in call time in seconds.
Max Call Time (sec)	Displays the maximum call time in seconds.

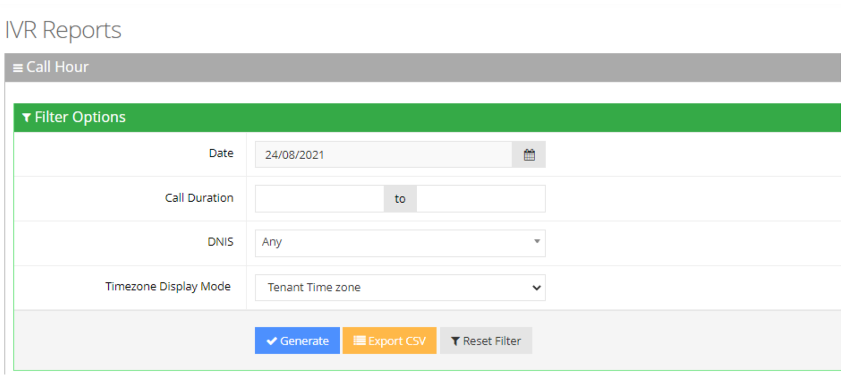
Call Hour Report

The procedure below describes how to generate a Call Hour IVR report.

➢ To generate a Call Hour IVR report:

1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Call Hour**); the following screen appears.

Figure 6-7: Call Hour IVR Filter Options



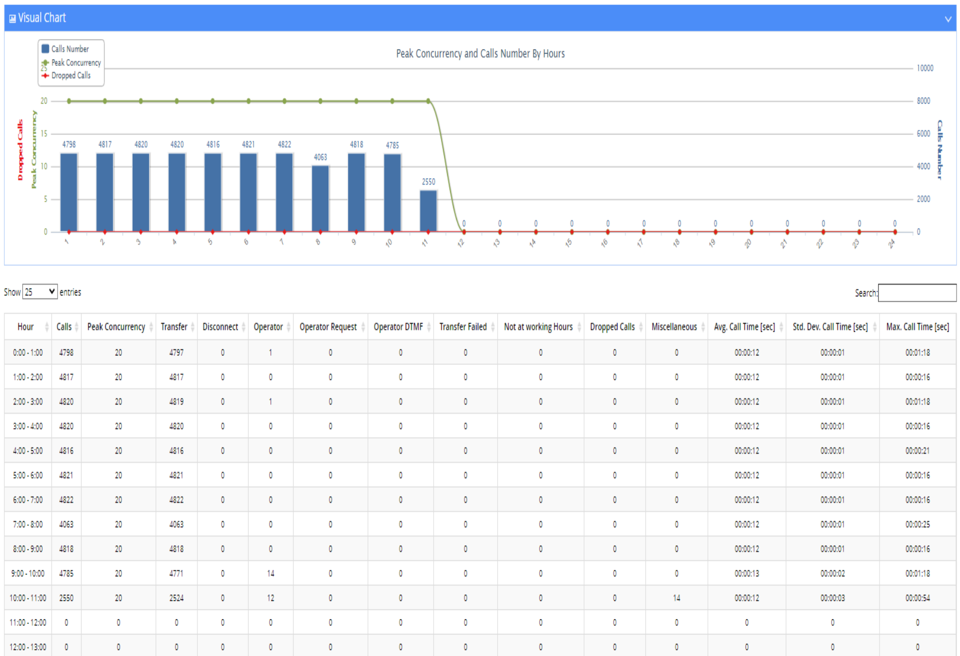
2. Select the appropriate filter fields:
   - **Date:** Defines the date the calls were made.
   - **Call Duration:** Defines the call duration.
   - **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
   - **Timezone Display Mode:** Defines the IVR call flow per timezone for each site, within the same Voca tenant. You can also generate Voca IVR reports by choosing their desired timezone based on three options:
     - Tenant time zone
     - Flow time zone

- Local time zone (Web)

3. Click one of the following:
   - Generate to view the report output.
   - Export CSV to export the report is CSV format.
   - Reset Filter to reset the filter values.

The figure below displays an example of the Call Hour IVR Report. The bar graph shows the number of calls made at a given hour. The green graph shows peak currency on a given hour.

Figure 6-8: Call Hour IVR Report Example



Hour	Calls	Peak Concurrency	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Dropped Calls	Miscellaneous	Avg. Call Time [sec]	Std. Dev. Call Time [sec]	Max. Call Time [sec]
0:00 - 1:00	4798	20	4797	0	1	0	0	0	0	0	0	00:00:12	00:00:01	00:01:18
1:00 - 2:00	4817	20	4817	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:16
2:00 - 3:00	4820	20	4819	0	1	0	0	0	0	0	0	00:00:12	00:00:01	00:01:18
3:00 - 4:00	4820	20	4820	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:16
4:00 - 5:00	4816	20	4816	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:21
5:00 - 6:00	4821	20	4821	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:16
6:00 - 7:00	4822	20	4822	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:16
7:00 - 8:00	4063	20	4063	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:25
8:00 - 9:00	4818	20	4818	0	0	0	0	0	0	0	0	00:00:12	00:00:01	00:00:16
9:00 - 10:00	4785	20	4771	0	14	0	0	0	0	0	0	00:00:13	00:00:02	00:01:18
10:00 - 11:00	2550	20	2524	0	12	0	0	0	0	0	14	00:00:12	00:00:03	00:00:54
11:00 - 12:00	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12:00 - 13:00	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Table 6-4: Call Hour IVR Report Description

Report Column	Description
Hour	Displays the time frame the calls were made in.
Calls	Displays the number of calls.
Peak Concurrency	Displays the maximum number of concurrent calls the system held for a specific period of time.
Transfer	Displays the number of transferred calls.
Disconnect	Displays the number of disconnected calls. Voca could have tried before to transfer the call with no answer.
Operator	Displays the number of calls transferred to the operator for some reason (not Operator Requested or Operator DTMF).

Report Column	Description
Operator Request	Displays the number of calls transferred to the Operator because the user asked by voice to be transferred to the Operator.
Operator DTMF	Displays the number of calls transferred to the Operator because the user pressed “0” and sent a DTMF to transfer the call to the Operator.
Transfer Failed	Displays the number of calls that failed to be transferred.
Not at Working Hours	Displays the number of calls that entered the system outside of the working hours.
Dropped Calls	Displays the number of calls dropped by the Media Gateway module when it exceeds the number of the concurrent channel license capacity. This deposition parameter represents the dropped calls for the past day. The calls are dropped when the Media Gateway module, which controls the total number of IVR ports, is configured with X number of channels. The X+1 call is rejected by the Media Gateway with SIP Error 404.
Miscellaneous	Displays the number of calls with disposition other to the ones in other columns.
Avg. Call Time (sec)	Displays the average call time in seconds.
Std. Dev. Call Time (sec)	Displays the standard deviation in call time, in seconds.
Max. Call Time (sec)	Displays the maximum call time in seconds.

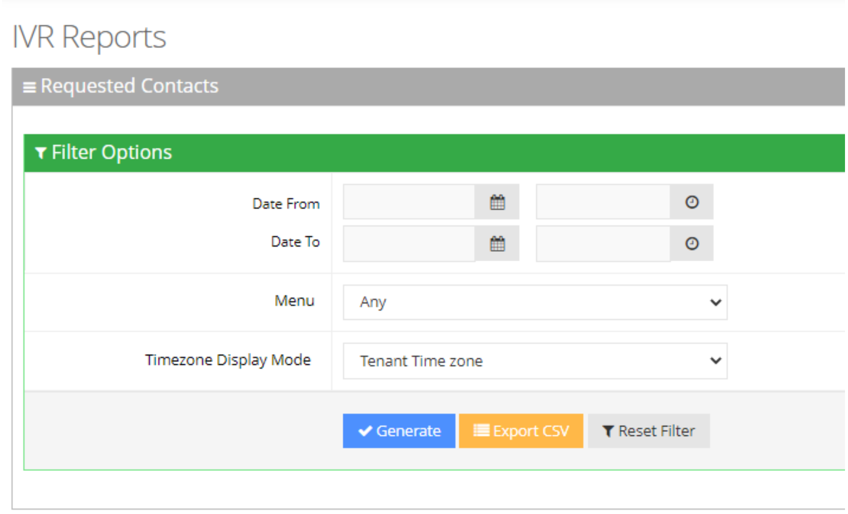
Requested Contacts Report

The procedure below describes how to generate a Requested Contacts report.

➢ **To generate a Requested Contacts report:**

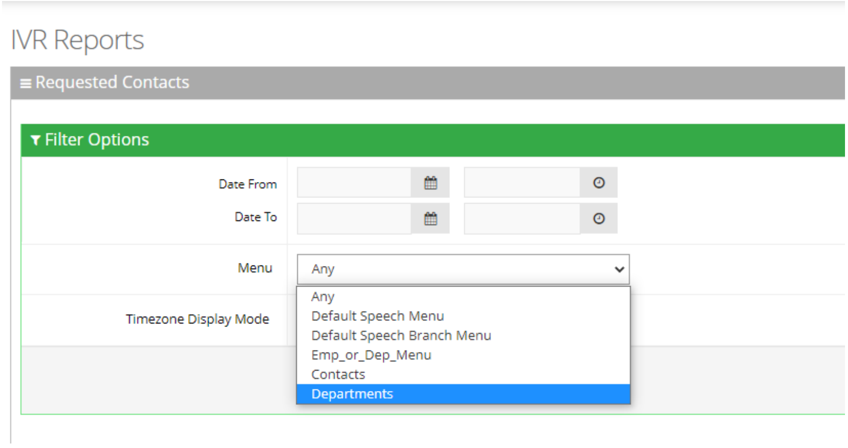
1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Requested Contacts**); the following appears.

Figure 6-9: Requested Contacts Report Filter



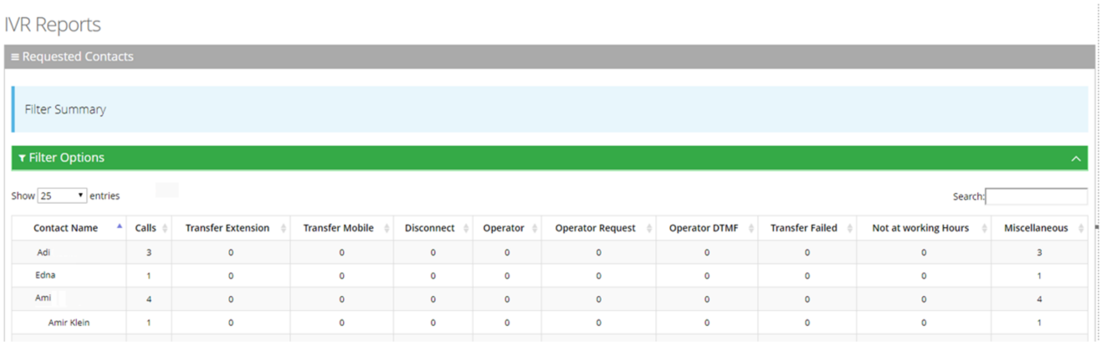
2. In the Requested Contacts - Filter Options screen, enter the Date and Time period you are requesting this report for.
3. From the 'Menu' drop-down list, select one of the options. Select **Any** if you want to filter by the latest name recognition during a call or select a specific menu option to filter by the last recognition done within that menu, during the call.
4. From the 'Timezone Display Mode' drop-down list, define the IVR call flow per timezone for each site, within the same Voca tenant. There are three options:
   - Tenant time zone
   - Flow time zone
   - Local time zone (Web)

Figure 6-10: IVR Reports



5. Click one of the following:
   - **Generate** to view the report output
   - **Export CSV** to export the report to CSV format
   - **Reset Filter** to reset the filter values

Figure 6-11: Requested Contacts Report Example



Report Column	Description
Calls	Displays the number of calls made to the Contact.
Transfer Extension	Displays the number of calls that were transferred to the Customer's extension.
Transfer Mobile	Displays the number of calls that were transferred to the Customer's mobile.
Disconnected	Displays the number of calls that were disconnected.
Operator	Displays the number of calls that were transferred to the operator.
Operator Request	Displays the number of calls that were requested to be transferred to the operator.
Operator DTMF	Displays the number of calls that used the Operator DTMF.
Transfer Failed	Displays the number of calls that the transfer failed.
Not at Working Hours	Displays the number of calls made outside of working hours.
Miscellaneous	Displays the number of calls that do not come under other dispositions in this report.

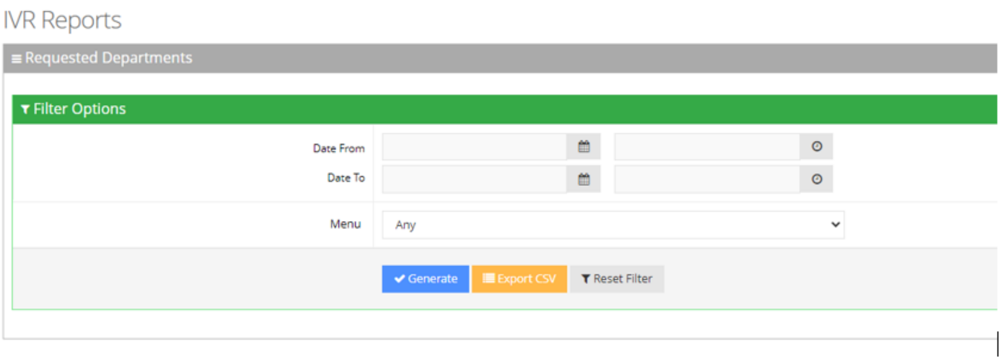
Requested Departments Report

The procedure below describes how to generate a Requested Departments Report.

➢ **To generate a Requested Departments report:**

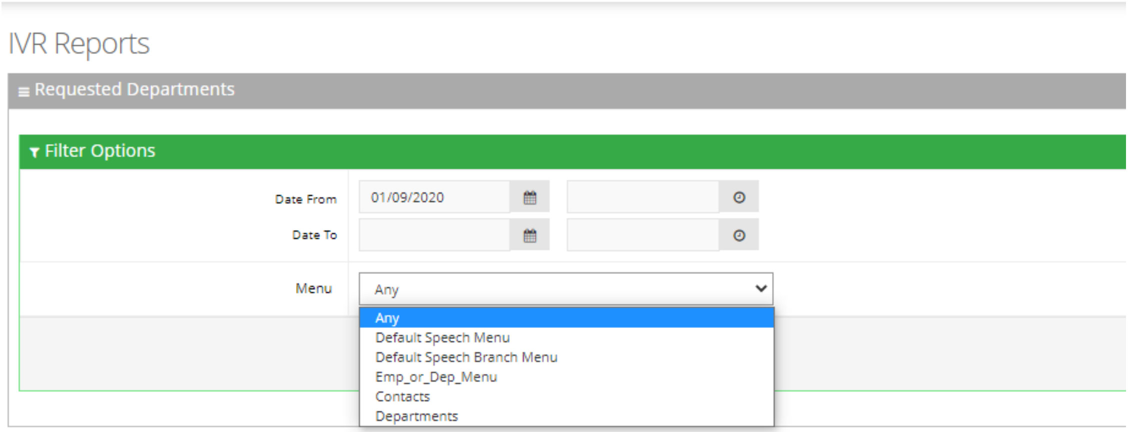
1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Requested Departments**); the following appears.

Requested Departments



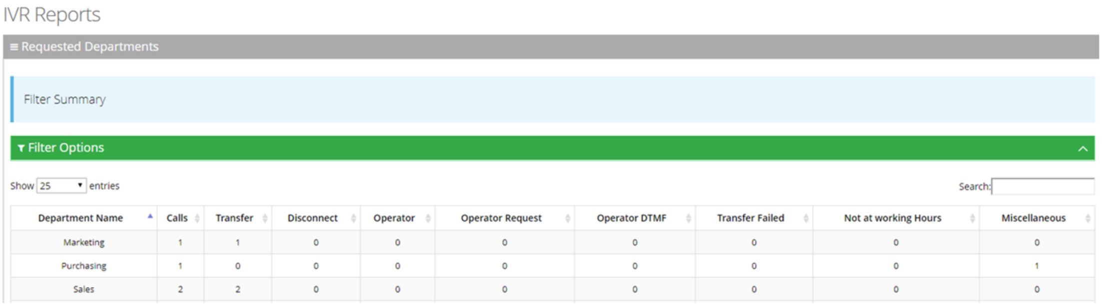
2. In the Requested Departments - Filter Options screen, enter the Date and Time period you are requesting this report for.
3. From the 'Menu' drop-down list, select one of the options. Select **Any** if you want to filter by the latest department recognition during a call or select a specific menu option to filter by the last recognition done within that menu, during the call.

Figure 6-12: Requested Departments Filter Options



4. Click one of the following:
   - **Generate** to view the report output
   - **Export CSV** to export the report to CSV format
   - **Reset Filter** to reset the filter values

Figure 6-13: Requested Departments Report Example



Report Column	Description
Calls	Displays the number of calls made to the Department.
Transfer	Displays the number of calls that were transferred to the Department.
Disconnected	Displays the number of Department calls that were disconnected.
Operator	Displays the number of Department calls that were transferred to the operator.
Operator Request	Displays the number of Department calls that were requested to be transferred to the operator.
Operator DTMF	Displays the number of Department calls that used the Operator DTMF.
Transfer Failed	Displays the number of Department calls that the transfer failed.
Not at Working Hours	Displays the number of Department calls made outside of working hours.
Miscellaneous	Displays the number of Department calls that come under other categories.

Other Reports

The following two reports are used for analyzing calls and finding problematic states within the call flow. These reports are only available for specific scenarios and dependent on system configuration.

- **Call End Statistics:** This report shows call details including related data of call ending – disposition, last call state and last result.

- **Call State/Disposition:** This report is pivot-based and shows the distribution of dispositions per call flow state. This report helps locate problematic states.

Call Queue Reports

You can generate the following Call Queue reports:

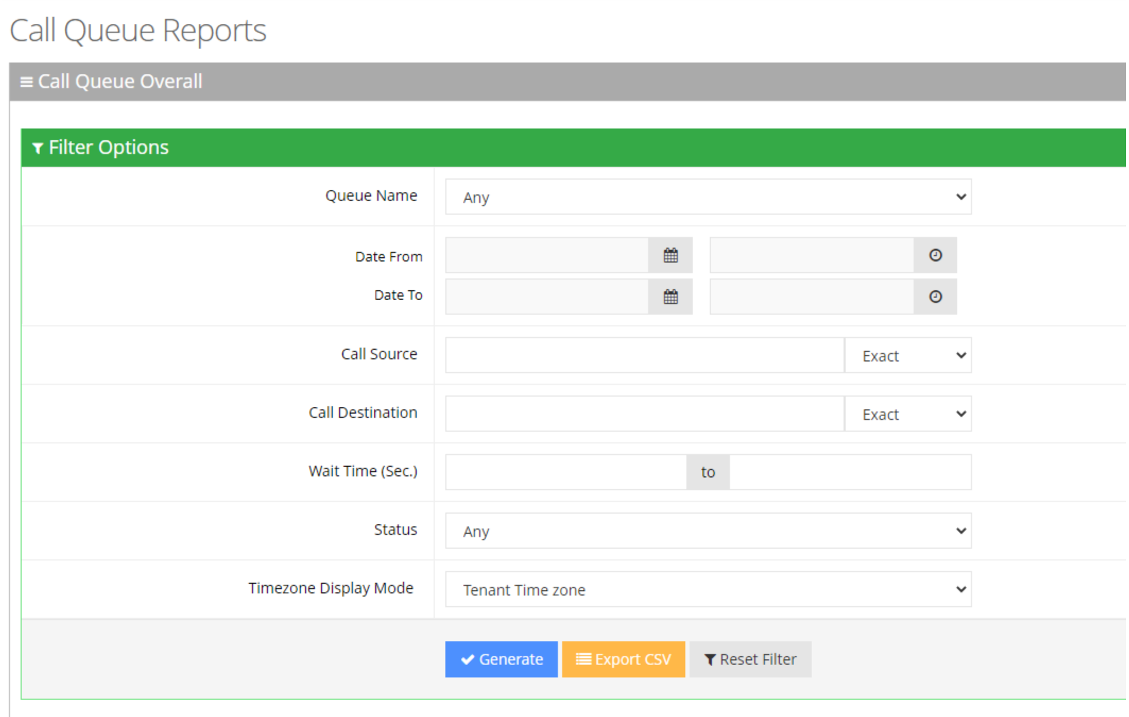
- Overall - Produces overall statistics of call queues.
- Drilldown – Produces a list of detailed calls in call queues.

Overall Report

The procedure below describes how to generate an Overall report.

➢ **To generate an Overall report:**

1. Open the Filter Options screen (**Reports** > **Call Queues Reports** > **Overall**); the following screen appears.



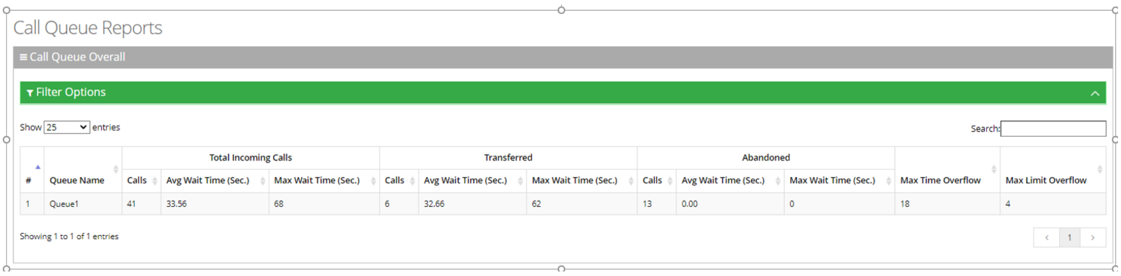
2. Select the appropriate filter fields:
   - **Queue Name:** Select a specific queue name or 'Any' to show statistics for all call queues.
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made till.
   - **Call Source:** Defines the source that calls were made from.
   - **Call Destination:** Defines the destination that calls were routed to from the queue.

- **Wait Time:** Defines the call waiting time in the queue.
- **Status:** Defines the disposition of the call when leaving the queue. It can be any of the following values:
  - Transferred from Queue: The call was transferred from the queue to one of its destinations.
  - Call abandoned: The call was abandoned by the caller.
  - Max Wait Time Exceeded: The call exceeded the maximum waiting time in the queue.
  - Max Call Limit Exceeded: The call exceeded the maximum number of calls in the queue.
- **Timezone Display Mode:** Select the timezone to be shown in the report:
  - Tenant Time zone: The data in the report is displayed based on the tenant configured timezone.
  - Flow Time zone: The data in the report is displayed based on the timezone configured under the Flow Menu settings.
  - Local Time zone (Web): The data in the report is generated based on the browser local timezone.

3. Click one of the following:
   - Generate to view the report output
   - Export CSV to export the report is CSV format
   - Reset Filter to reset the filter values
4. The generated report includes the following information:
   - Queue Name
   - Total of incoming calls – All calls incoming to the queue
     - Calls
     - Avg Wait Time (seconds)
     - Max Wait Time (seconds)
   - Transferred – Calls transferred from the queue
     - Calls
     - Avg Wait Time (seconds)
     - Max Wait Time (seconds)
   - Abandoned – Calls Abandoned by the user from the queue
     - Calls
     - Avg Wait Time (seconds)

  - Max Wait Time (seconds)

- **Max Time Overflow:** Number of calls that exceeded the time limit
- **Max Limit Overflow:** Number of calls that exceeded the number of calls limit

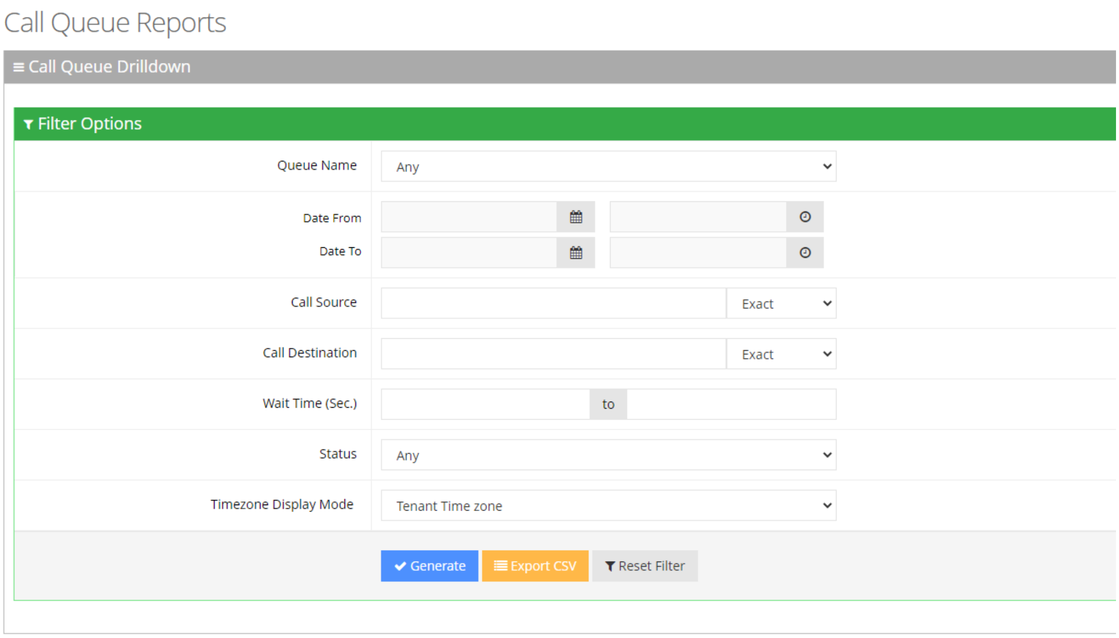


Drilldown Report

The procedure below describes how to generate an Overall report.

➢ **To generate an Drilldown report:**

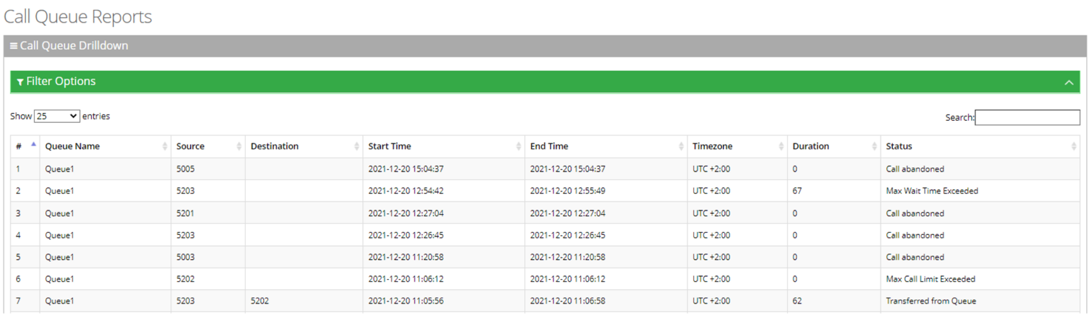
1. Open the Filter Options screen (**Reports** > **Call Queues Report**s > **Drilldown**); the following screen appears:



2. Select the appropriate filter fields:
   - **Queue Name:** Select a specific queue name or 'Any' to show statistics for all call queues.
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made till.
   - **Call Source:** Defines the source that calls were made from.
   - **Call Destination:** Defines the destination that calls were routed to from the queue.

- **Wait Time:** Defines the call waiting time in the queue.
- **Status:** Defines the disposition of the call when leaving the queue. It can be any of the following values:
  - Transferred from Queue: The call was transferred from the queue to one of its destinations.
  - Call abandoned: The call was abandoned by the caller.
  - Max Wait Time Exceeded: The call exceeded the maximum waiting time in the queue.
  - Max Call Limit Exceeded: The call exceeded the maximum number of calls in the queue.
- **Timezone Display Mode:** Select the timezone to be shown in the report:
  - **Tenant Time zone:** The data in the report is displayed based on the tenant configured timezone.
  - **Flow Time zone:** The data in the report is displayed based on the timezone configured under the Flow Menu settings.
  - **Local Time zone (Web):** The data in the report is generated based on the browser local timezone.

3. Click one of the following:
   - Generate to view the report output
   - Export CSV to export the report is CSV format
   - Reset Filter to reset the filter values
4. The generated report includes the following information:
   - Queue Name
   - **Source:** The source that calls were made from
   - **Destination:** The destination that calls were routed to from the queue
   - **Start time:** The time at which the call entered the queue
   - **End time:** The time at which the call left the queue
   - **Timezone:** The relevant timezone according to the option selected in the filter
   - **Duration:** The total time the call waited in queue
   - **Status:** The status of the call when it left the queue



#	Queue Name	Source	Destination	Start Time	End Time	Timezone	Duration	Status
1	Queue1	5005		2021-12-20 15:04:37	2021-12-20 15:04:37	UTC +2:00	0	Call abandoned
2	Queue1	5203		2021-12-20 12:54:42	2021-12-20 12:55:49	UTC +2:00	67	Max Wait Time Exceeded
3	Queue1	5201		2021-12-20 12:27:04	2021-12-20 12:27:04	UTC +2:00	0	Call abandoned
4	Queue1	5203		2021-12-20 12:26:45	2021-12-20 12:26:45	UTC +2:00	0	Call abandoned
5	Queue1	5003		2021-12-20 11:20:58	2021-12-20 11:20:58	UTC +2:00	0	Call abandoned
6	Queue1	5202		2021-12-20 11:06:12	2021-12-20 11:06:12	UTC +2:00	0	Max Call Limit Exceeded
7	Queue1	5203	5202	2021-12-20 11:05:56	2021-12-20 11:06:58	UTC +2:00	62	Transferred from Queue

Branch Reports

You can generate the following reports:

- **Branches by Date** - Produces a list of branches with the number of calls actually transferred to each branch in a specific period of time.
- **Requested Dest. by Date** – Produces a list of cities with the number of times the city was requested in a specific period of time.

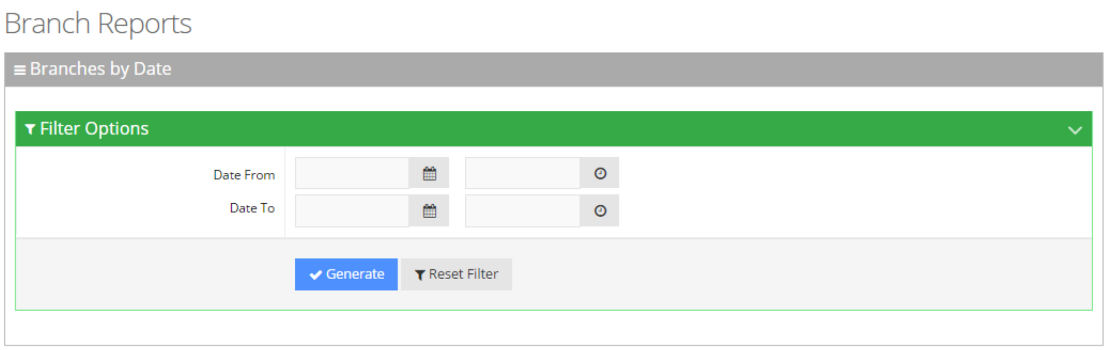
Branches by Date Report

The procedure below describes how to generate a Branches by Date report.

➢ To generate a Branches by Date report:

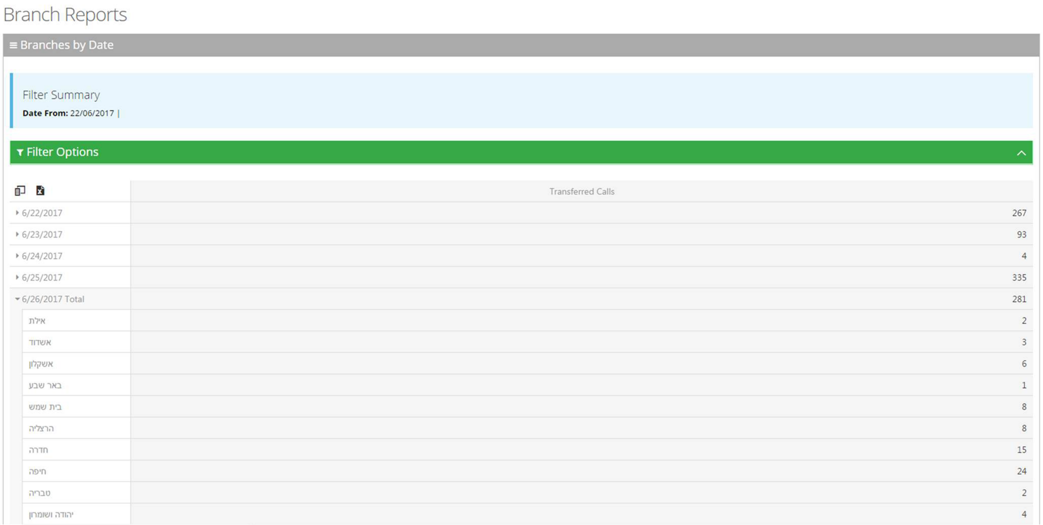
1. Open the Filter Options screen (**Reports** > **Branch Reports** > **Branches by Date**; the following screen appears.

Figure 6-14: Branches by Date Filter Options



2. Select the appropriate filter fields:
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made till.
3. Click **Generate** to view the report output; the following report example appears:

Figure 6-15: Branches by Date Report Example

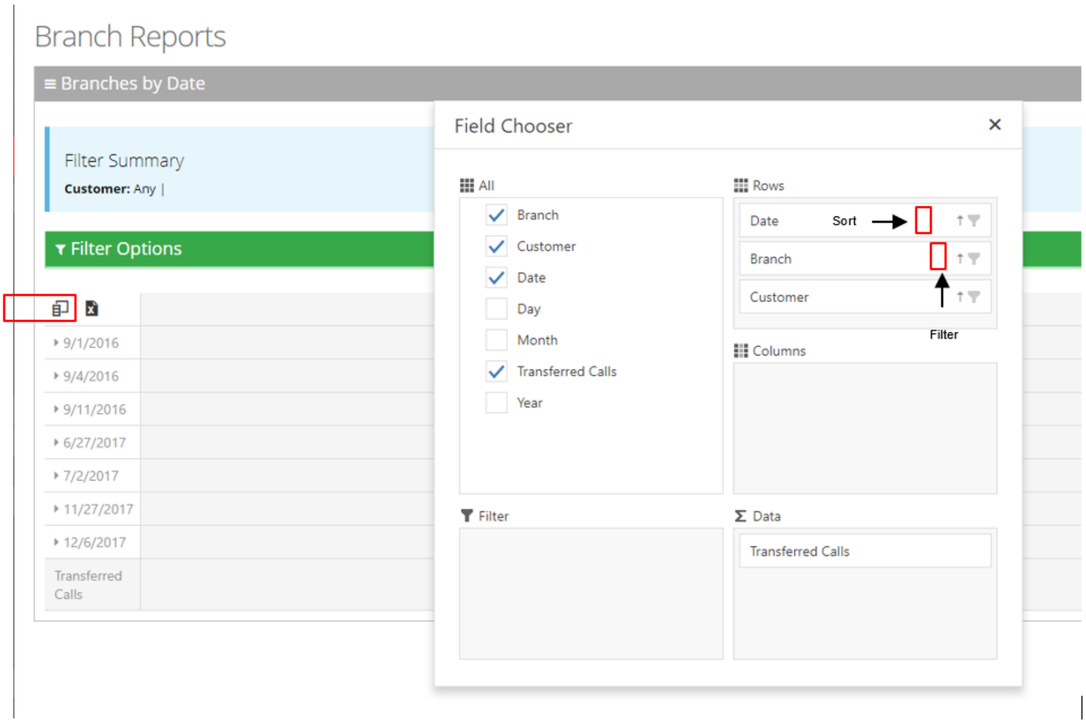


4. Click **Reset Filter** to reset the filter values.

Field Chooser

The Field Chooser is a multi-dimensional data analysis tool that allows to customize your options so you can quickly summarize trends using a cross-tabular display format. This tool is accessed by clicking the left icon under the Filter Options heading as shown in the figure below. When you click the right icon, the system exports the report to a UTF-8 CSV file.

Figure 6-16: Field Chooser



- **All:** Select the fields under the All heading, to choose the data you want displayed in the report. In the above example, Branch, Date and Transferred Calls are fields that will be displayed.
- **Rows:** Drag the fields selected under the All heading, to be displayed in a hierarchical format. These fields can be used for sorting or to filtering.
- **Columns:** Drag the fields selected under the All heading for additional columns in your report.
- **Data:** Under the Data heading, select what data you want summarized. In the above example, we will select how many calls were transferred to each branch by date.
- **Filter:** Select additional fields to use to filter the report.

The **Field Chooser** tool is also supported for the Requested Destination by Date Report.

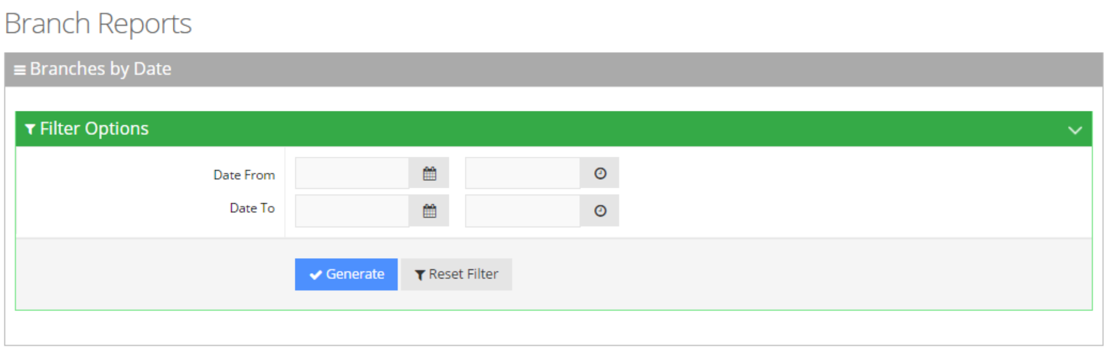
Requested Destination by Date Report

The procedure below describes how to generate a Requested Destination by Date report.

➢ **To generate a Requested Destination by Date report:**

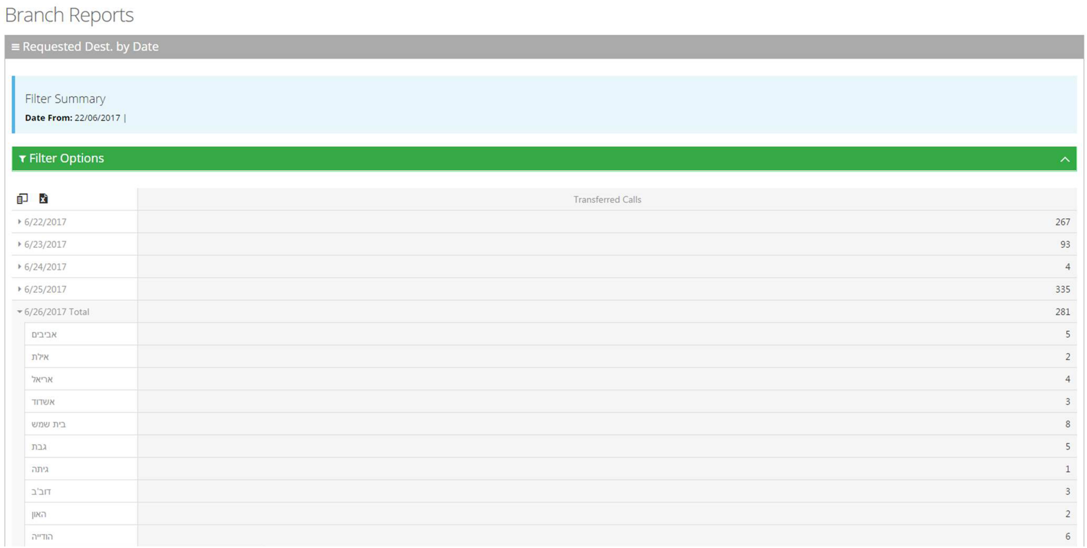
1. Open the Filter Options screen (**Reports** > **Branch Reports** > **Requested Dest. by Date**; the following screen appears:

Figure 6-17: Branches by Date Filter Options



2. Select the appropriate filter fields:
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made until.
3. Click **Generate** to view the report output; the following report example appears:

Figure 6-18: Requested Destinations by Date Report Example



App Reports

You can generate the following VocaNOM mobile app reports:

- **Overall Performance:** Displays the actual performance of actions made using the VocaNOM app.
- **Drill-down:** Displays details of each call made from the VocaNOM app.
- **Call Date:** Displays the call performance on the VocaNOM app on given dates.
- **Call Hour:** Displays call performance on the VocaNOM app by the hour for a specific day.
- **Call Usage:** Displays call usage on the VocaNOM app.

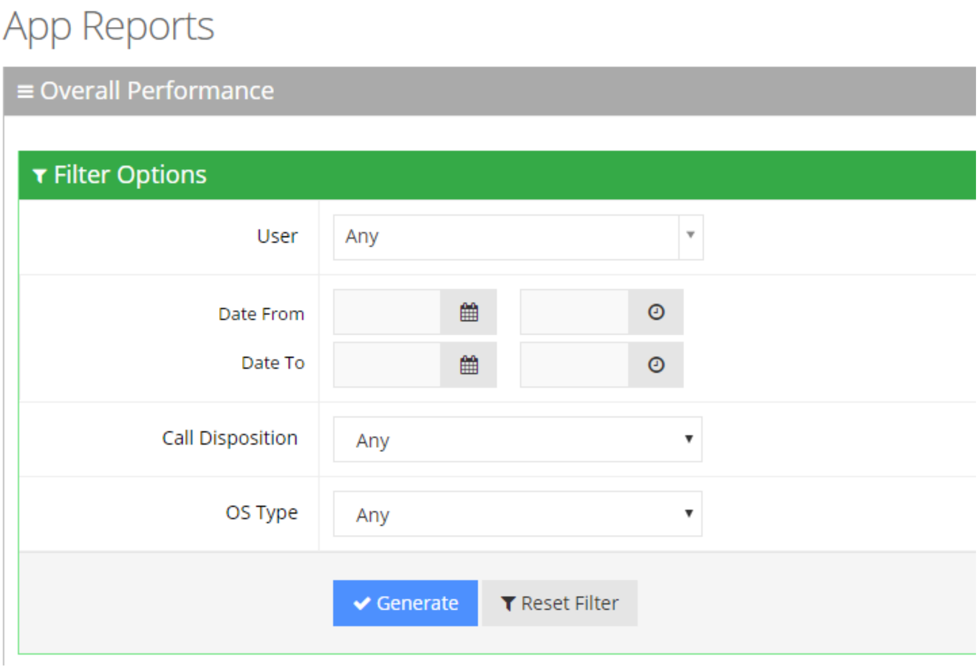
Overall Performance Report

The procedure below describes how to generate an Overall Performance report of actions made using the VocaNOM app.

➢ **To generate an Overall Performance app report:**

1. Open the Filter Options screen (**Reports** > **App Reports** > **Overall Performance**; the following screen appears.

Figure 6-19: Overall Performance App Filter Options



2. Select the appropriate filter fields:
   - User: Defines which user you want to filter on.
   - Date From: Defines the From Date from which the actions were made.
   - Date To: Defines the To Date that actions were made till.
   - Call Disposition: Defines the disposition of the action. It can be any of the following values:
     - Any
     - Dialed
     - WhatsApp
     - SMS
     - Emailed
     - Cancelled
     - No Results
   - OS Type: Defines the Mobile Phone Operating System type. It can be any of the following values:
     - Any
     - Android
     - iPhone OS
3. Click Generate to view the report output or Reset Filter to reset the filter values.

Figure 6-20: Overall Performance App Report Example

The Overall Performance report displays a summary of the performance of calls handled by Voca for a specific date or date range. The performance summary includes the following statistics (dispositions):

- **Dialed:** The total number of calls directed to the native dialer
- **WhatsApp:** The total number of calls directed to WhatsApp
- **SMS:** The total number of calls directed to SMS
- **Email:** The total number of calls directed to e-mail
- **Cancelled:** The total number of cancelled calls
- **No results:** The number of calls with no results

The report displays the statistics in three different formats:

- **Table format:** The table also shows the number of users using the application
- **Pie chart:** Reflects the results of the table format.
- **Stacked bar chart:** Represents the origin of the dispositions by the following categories
  - Recents – the number of calls from pressing the Recent items button
  - Recognition – the number of calls from voice commands
  - Contact details screen – all details aggregated
  - Other – historical information- no longer in use.

For example, from the 25 dialed calls, three of them originated from the **Recents** button.

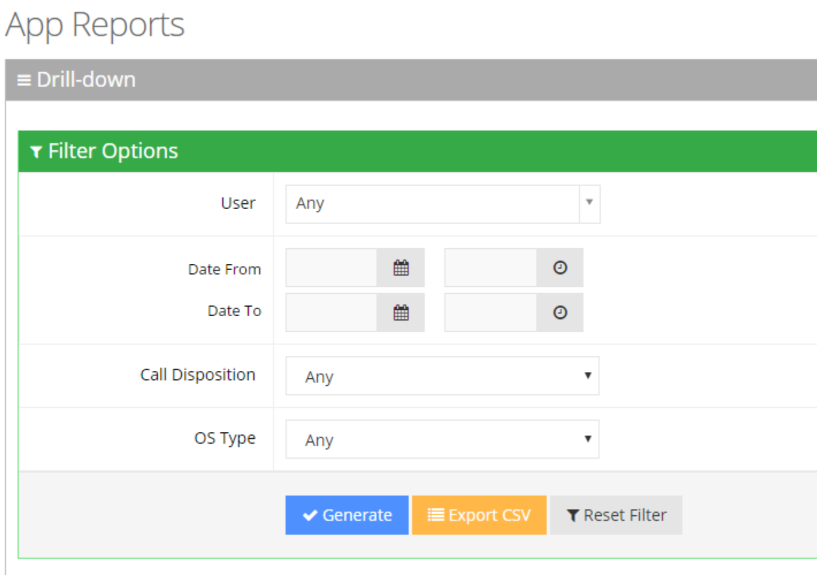
Drill-down Report

The procedure below describes how to generate a Drill-down Report of actions made using the VocaNOM app.

➢ To generate a Drill-down report:

1. Open the Filter Options screen (**Reports** > **App Reports** > **Drill-down**; the following screen appears.

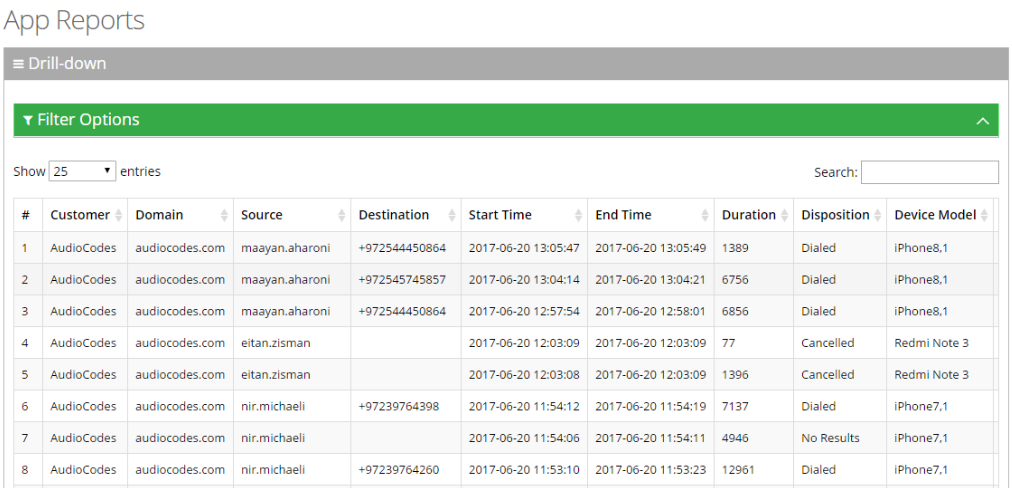
Figure 6-21: Drill-down App Filter Options



2. Select the appropriate filter fields:
   - **User:** Defines which user you want to filter on.
   - **Date From:** Defines the From Date from which the actions were made.
   - **Date To:** Defines the To Date that actions were made till.
   - **Call Disposition:** Defines the disposition of the action. It can be any of the following values:
     - Any
     - Dialed
     - WhatsApp
     - SMS
     - Email
     - Cancelled
     - No Results
   - **OS Type:** Defines the Mobile Phone Operating System type. It can be any of the following values:
     - Any
     - Android
     - iPhone OS

3. Click one of the following:
   - Generate to view the report output
   - Export CSV to export the report is CSV format
   - Reset Filter to reset the filter values
4. The figure below displays an example of the Drill-down report.

Figure 6-22: Drill-down App Report Example



#	Customer	Domain	Source	Destination	Start Time	End Time	Duration	Disposition	Device Model
1	AudioCodes	audiocodes.com	maayan.aharoni	+972544450864	2017-06-20 13:05:47	2017-06-20 13:05:49	1389	Dialed	iPhone8,1
2	AudioCodes	audiocodes.com	maayan.aharoni	+972545745857	2017-06-20 13:04:14	2017-06-20 13:04:21	6756	Dialed	iPhone8,1
3	AudioCodes	audiocodes.com	maayan.aharoni	+972544450864	2017-06-20 12:57:54	2017-06-20 12:58:01	6856	Dialed	iPhone8,1
4	AudioCodes	audiocodes.com	eitan.zisman		2017-06-20 12:03:09	2017-06-20 12:03:09	77	Cancelled	Redmi Note 3
5	AudioCodes	audiocodes.com	eitan.zisman		2017-06-20 12:03:08	2017-06-20 12:03:09	1396	Cancelled	Redmi Note 3
6	AudioCodes	audiocodes.com	nir.michaeli	+97239764398	2017-06-20 11:54:12	2017-06-20 11:54:19	7137	Dialed	iPhone7,1
7	AudioCodes	audiocodes.com	nir.michaeli		2017-06-20 11:54:06	2017-06-20 11:54:11	4946	No Results	iPhone7,1
8	AudioCodes	audiocodes.com	nir.michaeli	+97239764260	2017-06-20 11:53:10	2017-06-20 11:53:23	12961	Dialed	iPhone7,1

Table 6-5: Drill-down App Report Description

Report Column	Description
Customer	Displays the customer name.
Domain	Displays the domain name.
Source	Displays the source the action was made from.
Destination	Displays the destination of the action.
Start Time	Displays the start time of the action.
Disposition	Displays the disposition of the action.
Device Model	Displays the type of device.
OS Type	Displays the operating system of the source device.
OS Version	Displays the operating system version of the source device.

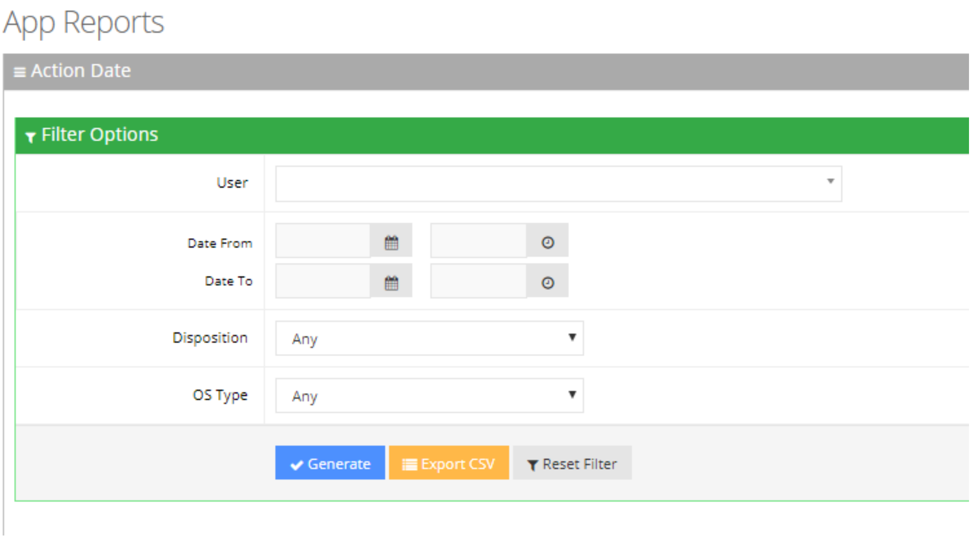
Action Date Report

The procedure below describes how to generate an Action Date report of actions made using the VocaNOM app.

➢ To generate an Action Date app report:

1. Open the Filter Options screen (**Reports** > **App Reports** > **Action Date**); the following screen appears.

Figure 6-23: Action Date App Filter Options



2. Select the appropriate filter fields:

- **User:** Defines which user you want to filter on.
- **Date From:** Defines the From Date from which the actions were made.
- **Date To:** Defines the To Date that actions were made till.
- **Call Disposition:** Defines the disposition of the action. It can be any of the following values:
  - Any
  - Dialed
  - WhatsApp
  - SMS
  - Email
  - Cancelled
  - No Results
- OS Type: Defines the Mobile Phone Operating System type. It can be any of the following values:
  - Any

- Android
- iPhone OS

3. Click one of the following:
   - **Generate** to view the report output.
   - **Export CSV** to export the report to CSV format.
   - **Reset Filter** to reset the filter values.

The figure below displays an example of the Action Date app report.

Figure 6-24: Action Date App Report Example

Table 6-6: Action Date App Report Descriptions

Report Column	Description
Date	Displays the date the actions were made.
Total Actions	Displays the number of actions made on a specific date.
Dialed	Displays the number of dialed numbers made on a specific date.
WhatsApp	Displays the number of WhatsApp messages sent on a specific date.
SMS	Displays the number of SMS messages sent on a specific date.
Email	Displays the number of Email messages sent on a specific date.
Canceled	Displays the number of cancelled actions made on a specific date.
No Results	Displays the number of times the App returned with no results for a recognition attempt on a specific date.
Unique Users	Displays the number of unique users that used the App on a specific date.
Unique Destinations	Displays the number of unique destinations that received a call or a message on a specific date.

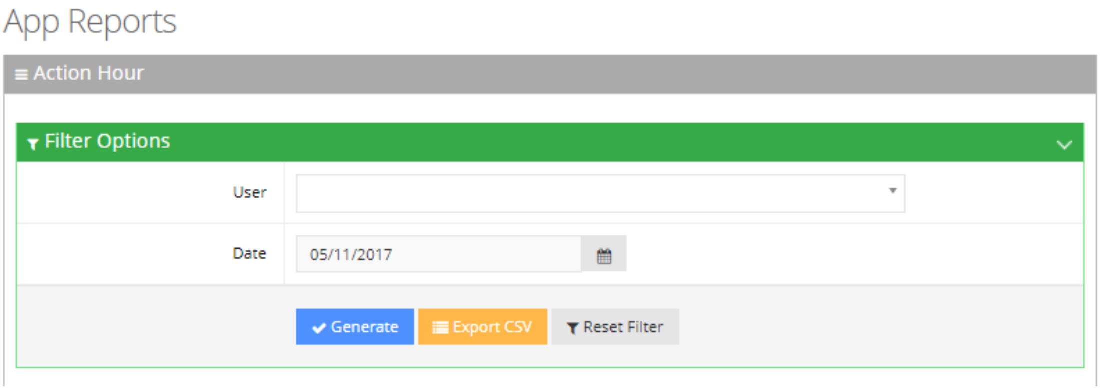
Action Hour Report

The procedure below describes how to generate an Action Hour report of actions made, by the hour, using the VocaNOM app.

➢ **To generate an Action Hour app report:**

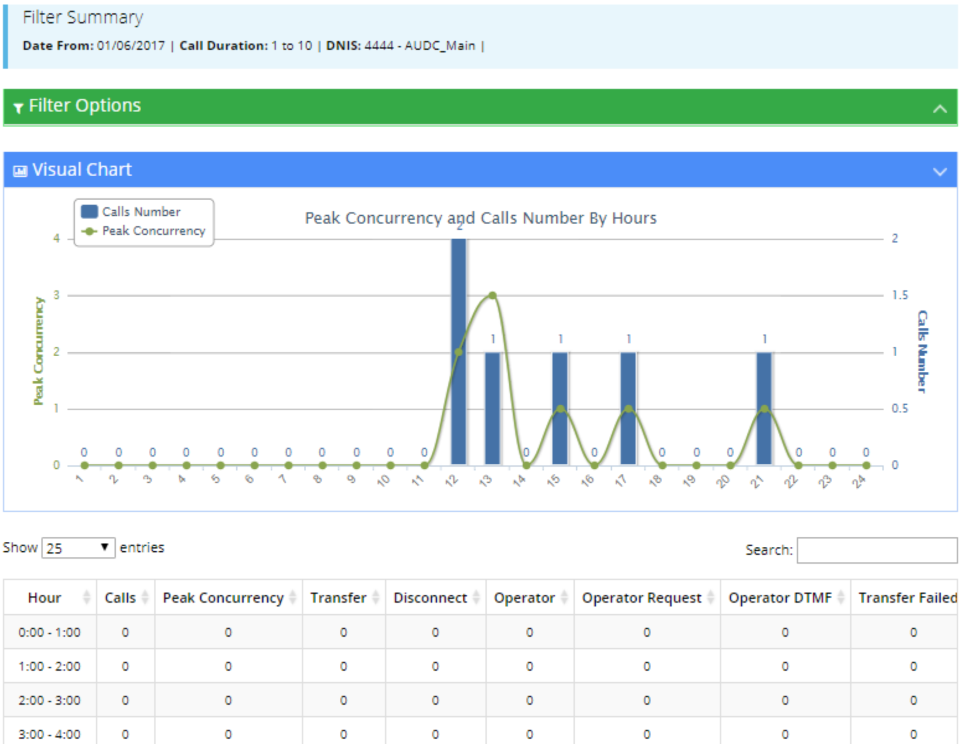
1. Open the Filter Options screen (**Reports** > **App Reports** > **Action Hour**); the following screen appears.

Figure 6-25: Action Hour App Filter Options



2. Select the appropriate filter fields:
   - **User:** Defines which user you want to filter on.
   - **Date From:** Defines the date that the actions were made.
3. Click one of the following:
   - Generate to view the report output.
   - Export CSV to export the report is CSV format.
   - Reset Filter to reset the filter values.

Figure 6-26: Action Hour App Report Example



Hour	Calls	Peak Concurrency	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed
0:00 - 1:00	0	0	0	0	0	0	0	0
1:00 - 2:00	0	0	0	0	0	0	0	0
2:00 - 3:00	0	0	0	0	0	0	0	0
3:00 - 4:00	0	0	0	0	0	0	0	0

Table 6-7: Action Hour App Report Descriptions

Report Column	Description
Hour	Displays the hour the actions were made.
Total Actions	Displays the number of actions made on a specific hour.
Dialed	Displays the number of dialed numbers made on a specific hour.
WhatsApp	Displays the number of WhatsApp messages sent on a specific hour.
SMS	Displays the number of SMS sent on a specific hour.
Email	Displays the number of Email messages sent on a specific hour.
Cancelled	Displays the number of cancelled actions made during a specific hour.
No Results	Displays the number of times the App returned with no results for a recognition attempt on a specific hour.
Unique Users	Displays the number of unique users that used the App on a specific hour.
Unique Destinations	Displays the number of unique destinations that received a call or a message for a specific hour.

Action Usage Report

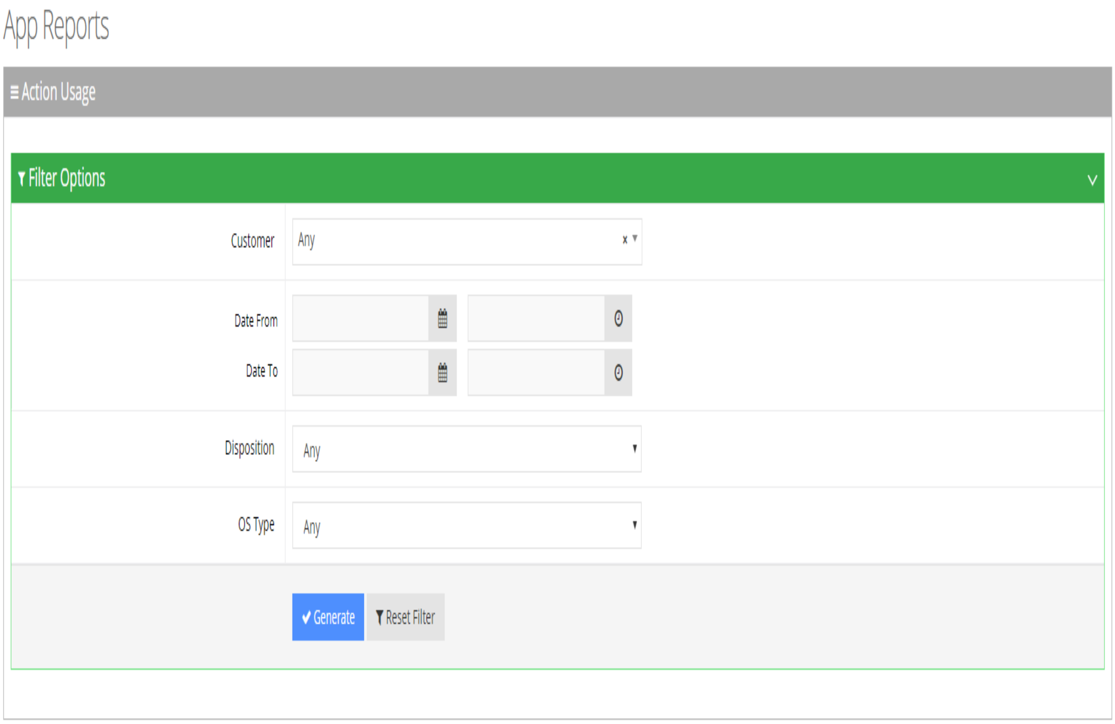
The procedure below describes how to generate an Action Usage report of actions made using the VocaNOM app.

The Action Usage Report is available only for Provider privileges.

➢ **To generate an Action Usage report:**

1. Open the Filter Options screen (**Reports** > **App Reports** > **Action Usage**); the following screen appears.

Figure 6-27: Action Usage App Filter Options



2. Select the appropriate filter fields:
   - **Date From:** Defines the From Date from which the actions were made.
   - **Date To:** Defines the To Date that actions were made till.
   - **Call Disposition:** Defines the disposition of the action. It can be one of the following values:
     - Any
     - Dialed
     - WhatsApp
     - SMS
     - Email
     - Canceled
     - No Results
   - **OS Type:** Defines the Mobile Phone Operating System type. It can be one of the following values:
     - Any
     - Android
     - iPhone OS
3. Click **Generate** to view the report output or Reset Filter to reset the filter values.

7 Configuration

This section describes how to configure the following:

- Prompts
- Flow Settings
- Outgoing Rules
- Menu Settings
- Working Hours
- Events & Holidays
- Additional Employees
- System Settings
- LDAP Settings

Adding a Voice Prompt

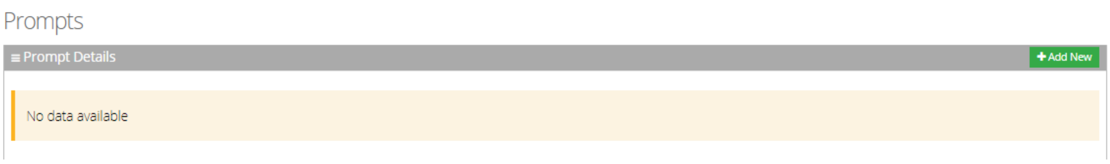
When calling the Voca service, the recorded prompts will be heard. The prompts can be used for other settings in the menu configuration. The system contains default prompts. These prompts can be overwritten or new prompts can be recorded with specific messages.

The procedure below describes how to upload an audio prompt for the Voca service.

➢ **To add a new prompt:**

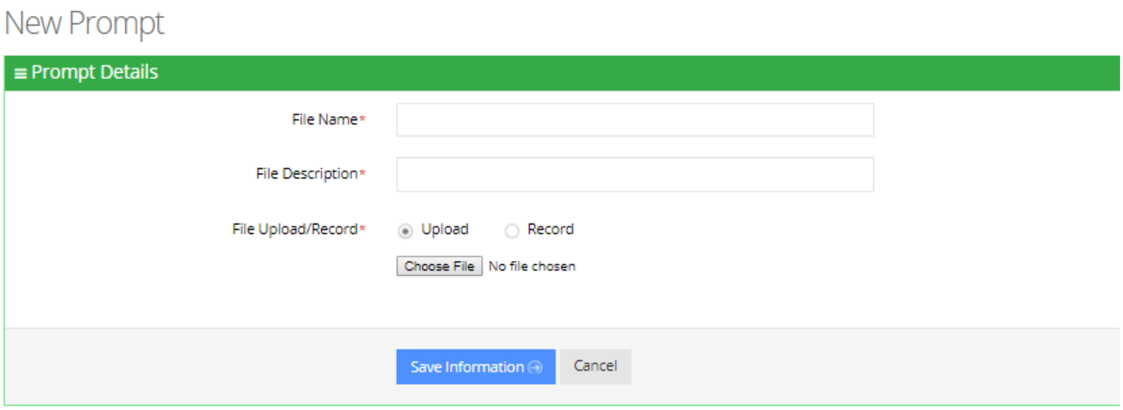
1. Open the Prompt Details screen (**Configuration** > **Prompts**); the following screen appears:

Figure 7-1: Prompt Details



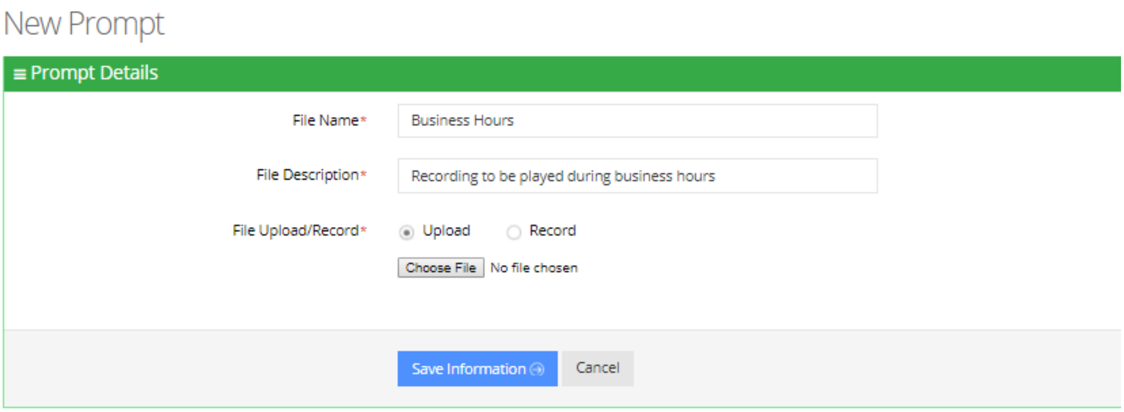
2. From the Prompts screen, click **Add New**; the following screen appears:

Figure 7-2: Add New Prompt



3. Enter the prompt details in the fields provided.

Figure 7-3: New Prompt Details



4. In the 'File Name' field, enter the audio file name.
5. In the 'File Description' field, enter a description of the prompt.
6. You can either Upload a prompt or Record a new prompt.

➢ To upload a file:

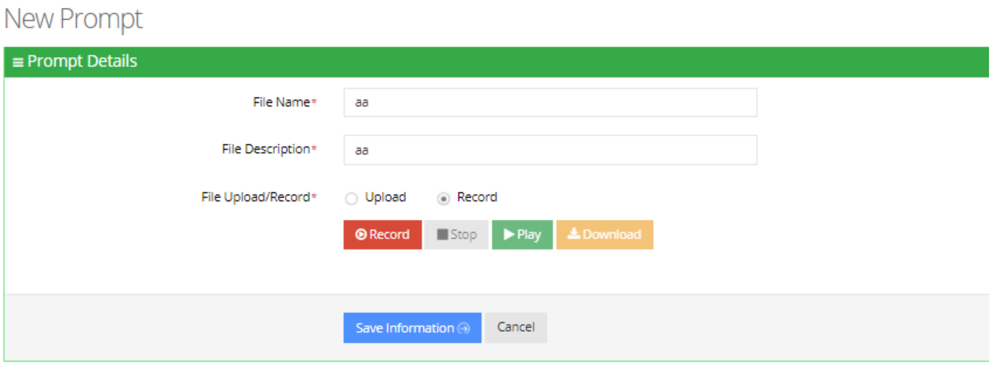
1. Click the **Upload** option.
2. Click **Choose File** to locate the audio file to be uploaded.
3. Click **Save Information** to complete the upload process.

The audio file must be in the following format - .wav file, with 16 Bit Resolution, mono, 8000Hz.

➢ To record a file:

1. Click **Record**, and then begin recording your prompt.

Figure 7-4: Record New Prompt Details



2. When finished recording, click **Stop**.
3. To replay the recent recording, click **Play**.
4. To save a copy of the recorded audio file, click **Download**.
5. Click **Save Information** to complete the recording process.

Configuring Flow Settings

The procedures below **describe** how to view and configure Flows and assign DNIS numbers.

➢ To view Flow settings:

1. Open the Flow Settings screen (**Configuration** > **Flow Settings**); the following screen appears.

Figure 7-5: Call Flow Settings

The Flow Settings screen is described below:

- **DNIS Number:** Defines the Access phone number for the IVR service. e.g., 5555
- **DNIS Name:** Defines the name of the IVR service.
- **Timezone:** Defines the timezone associated with the DNIS number. When calling this number, working hours, holidays and events are checked based on the timezone.
- **Working Hour Set:** Defines which working hour set will be used to define the working/non-working days/time for the flow.

- **Employee Working Hours Menu:** Defines the menu for calling employees during normal working hours. This menu should be selected from the available menus configured in “Menu Settings”.
- **Employee Non-Working Hours Menu:** Defines the menu for calling employees after normal working hours. This menu should be selected from the available menus configured in “Menu Settings”.
- **Non-Employee Working Hours Menu:** Defines the menu for calling non-employees during normal working hours. This menu should be selected from the available menus configured in “Menu Settings”.
- **Non-Employee Non-Working Hours Menu:** Defines the menu for calling non-employees after normal working hours. This menu should be selected from the available menus configured in “Menu Settings”.

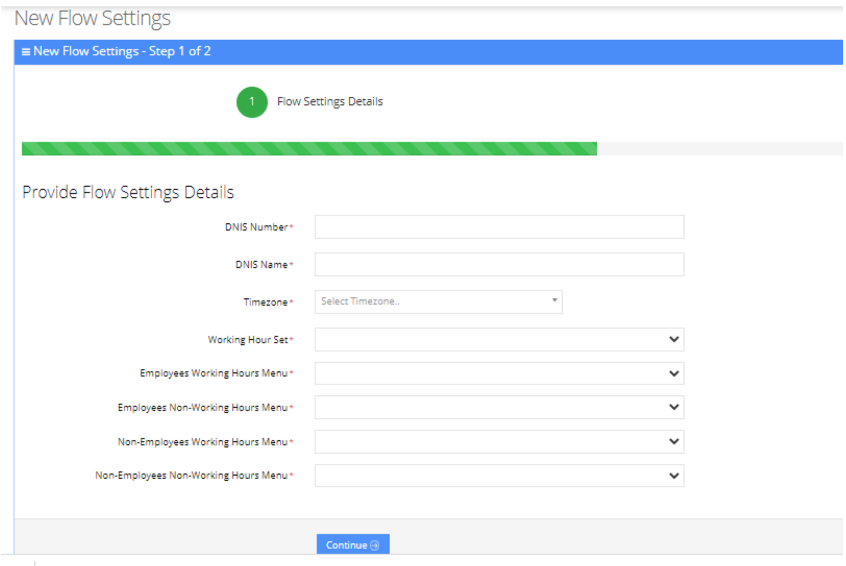
Adding a Flow Setting

The procedure below describes how to add a flow setting.

➢ To add a flow setting:

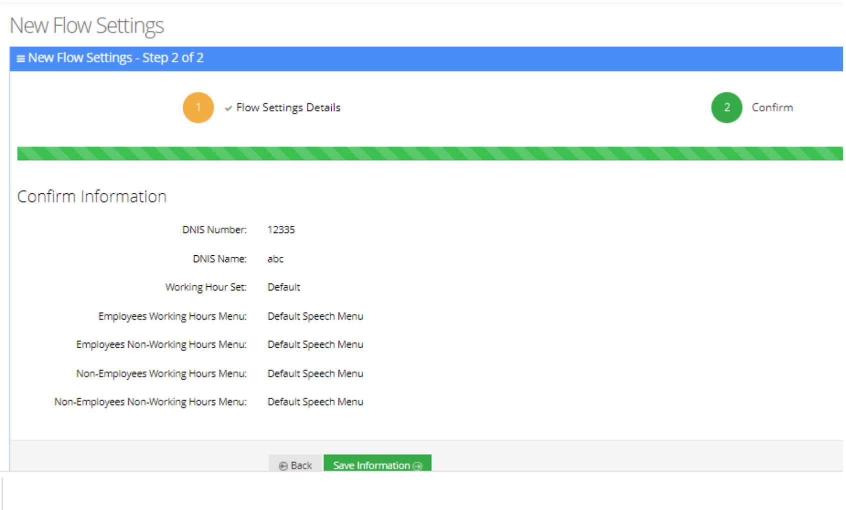
1. Open the Flow Settings screen (**Configuration** > **Flow Settings**); the following screen appears.
2. Click **Add New**; the following screen appears:

Figure 7-6: Add New Flow Settings



3. Add details, and then click **Continue**; the following screen appears:

Figure 7-7: Add New Flow Settings Example - Save



4. Click **Save Information**.

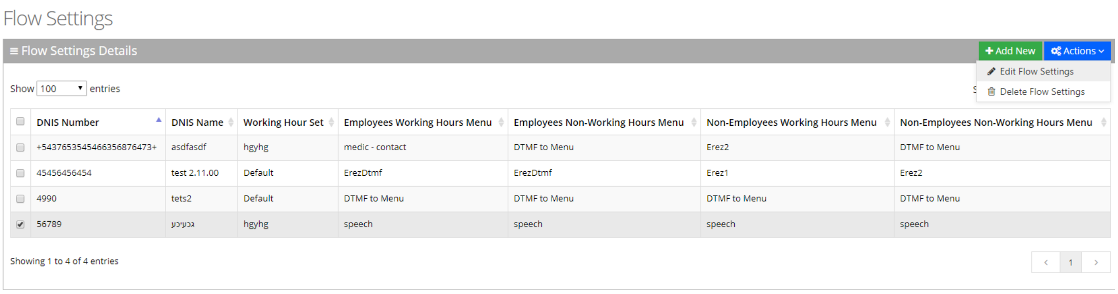
Editing a Flow Setting

The procedure below describes how to edit a flow setting.

➢ To edit a Flow setting:

1. Open the Flow Settings Details screen (**Configuration** > **Flow Settings**).

Figure 7-8: Edit Flow Settings



2. Select the Flow Setting you wish to edit by enabling the **Flow Settings** check box.
3. From the 'Actions' drop-down list, select **Edit Flow Settings**; the Flow Settings Details screen appears.
4. Make the necessary changes and click **Continue**.
5. Click **Save Changes**.

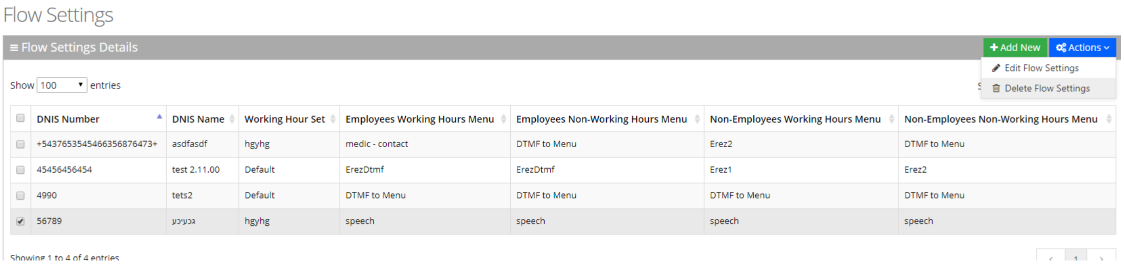
Deleting a Flow Setting

The procedure below describes how to delete a Flow setting.

➢ To delete a Flow setting:

1. Open the Flow Settings Details screen (Configuration > Flow Settings).

Figure 7-9: Delete Flow Settings



2. Select the Flow Setting you wish to delete by enabling the **Flow Settings** check box. From the ‘Actions’ drop-down list, select **Delete Flow Settings**.
3. The following message appears: "Are you sure you want to delete the selected flow settings?"
4. Click **OK** to delete the selected Flow Setting.

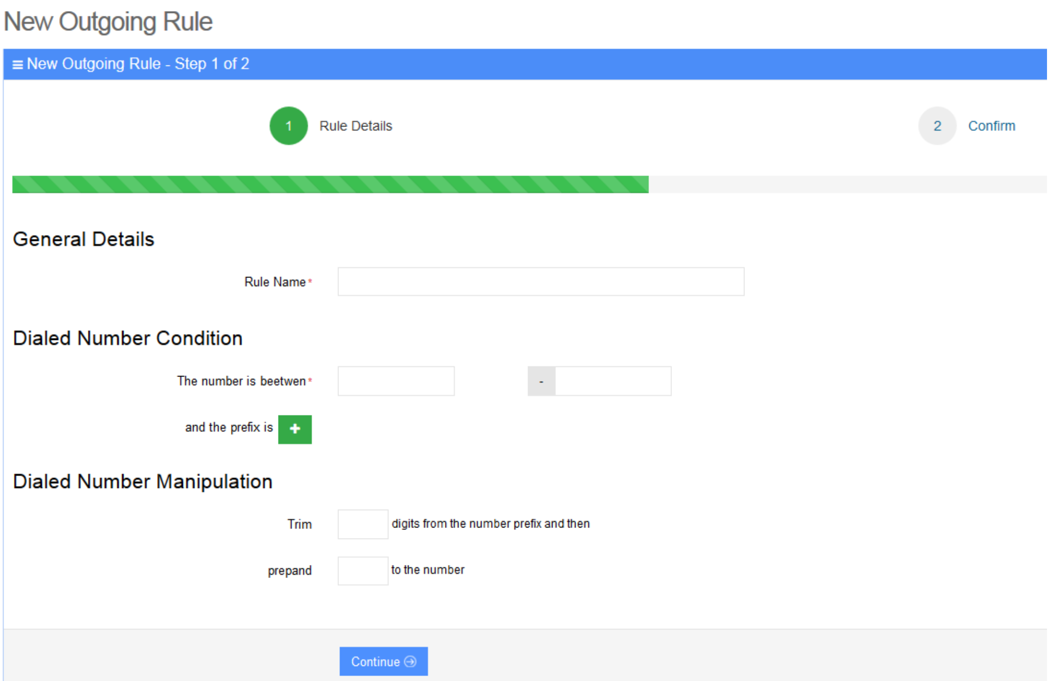
Managing Outgoing Rules

The procedure below describes how to define outgoing phone number manipulation rules.

➢ To create a new outgoing rule:

1. Open the Outgoing Rules Details screen (**Configuration** > **Outgoing Rules**); the following screen appears.

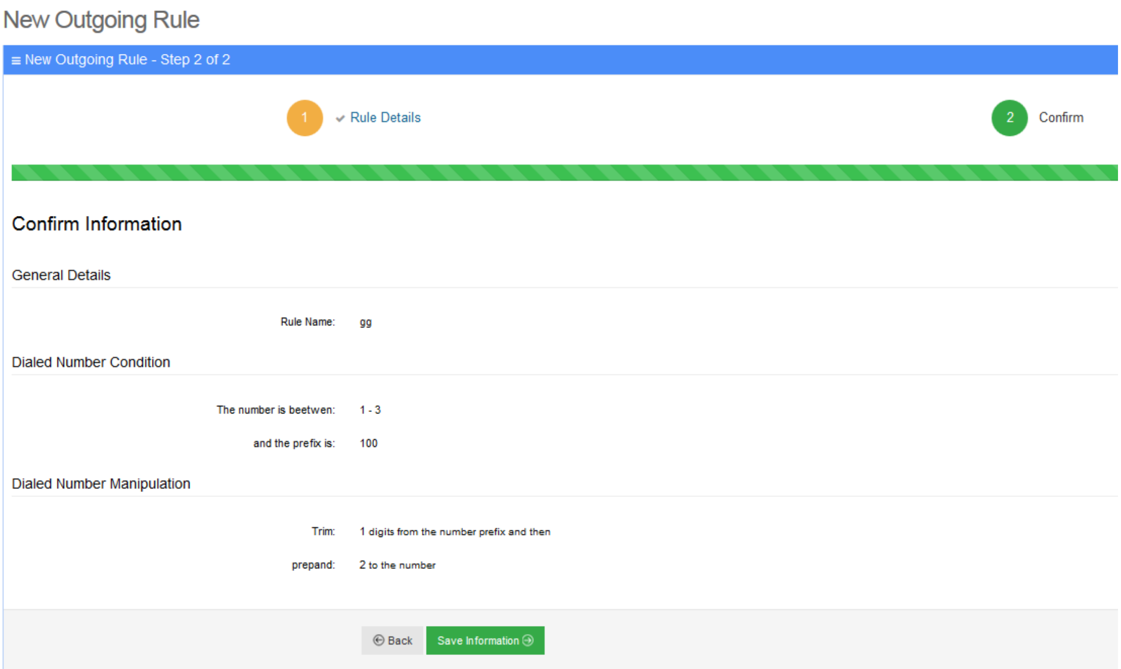
Figure 7-10: New Outgoing Rule



2. From the Outgoing Rules screen, click **Add New**; the following screen appears:

3. Under the General Details group, in the ‘Rule Name’ field, enter the name of the new manipulation rule to be added.
4. Under the Dialed Number Condition group, in the “The number is between” field, enter the number of digits (minimum and maximum) required for the manipulation.
5. Click the **Green plus** button to enter a prefix.
6. Under the Dialed Number Manipulation group:
   a. In the Trim box, enter the number of digits to be removed from the prefix of the Destination number.
   b. In the Prepared box, enter the number to be added to the Destination number.
7. Click **Continue**; the following screen appears:

Figure 7-11: New Outgoing Rule Save Information



8. Click **Save Information**.

Configuring Menu Settings

The procedure below describes how to add and configure speech and DTMF menus. There are two different types of menus:

- Speech Menu
- DTMF Menu

Adding DTMF and Speech Menus

You can add DTMF and Speech menus:

- New DTMF

- VocaNOM IVR Speech
- VocaNOM Branch Speech

Adding a DTMF Menu

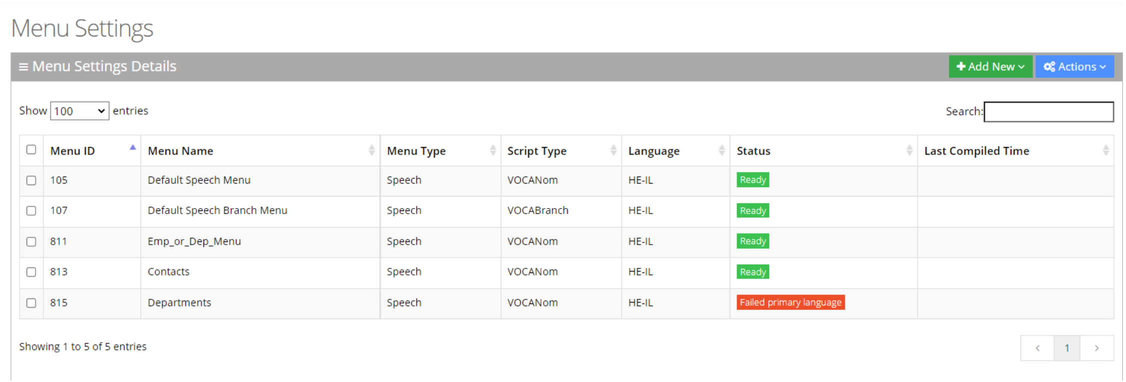
The procedure below describes how you can add a DTMF menu.

➢ To add a DTMF menu:

1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following screen example appears.

Figure 7-12: Menu Settings Example

Figure 7-13:


Menu Settings

≡ Menu Settings Details + Add New Actions

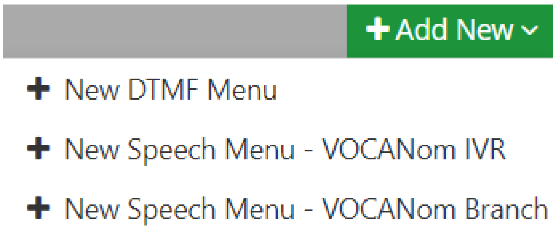
Show 100 entries Search:

	Menu ID	Menu Name	Menu Type	Script Type	Language	Status	Last Compiled Time
☐	105	Default Speech Menu	Speech	VOCANom	HE-IL	Ready	
☐	107	Default Speech Branch Menu	Speech	VOCABranch	HE-IL	Ready	
☐	811	Emp_or_Dep_Menu	Speech	VOCANom	HE-IL	Ready	
☐	813	Contacts	Speech	VOCANom	HE-IL	Ready	
☐	815	Departments	Speech	VOCANom	HE-IL	Failed primary language	

Showing 1 to 5 of 5 entries 1

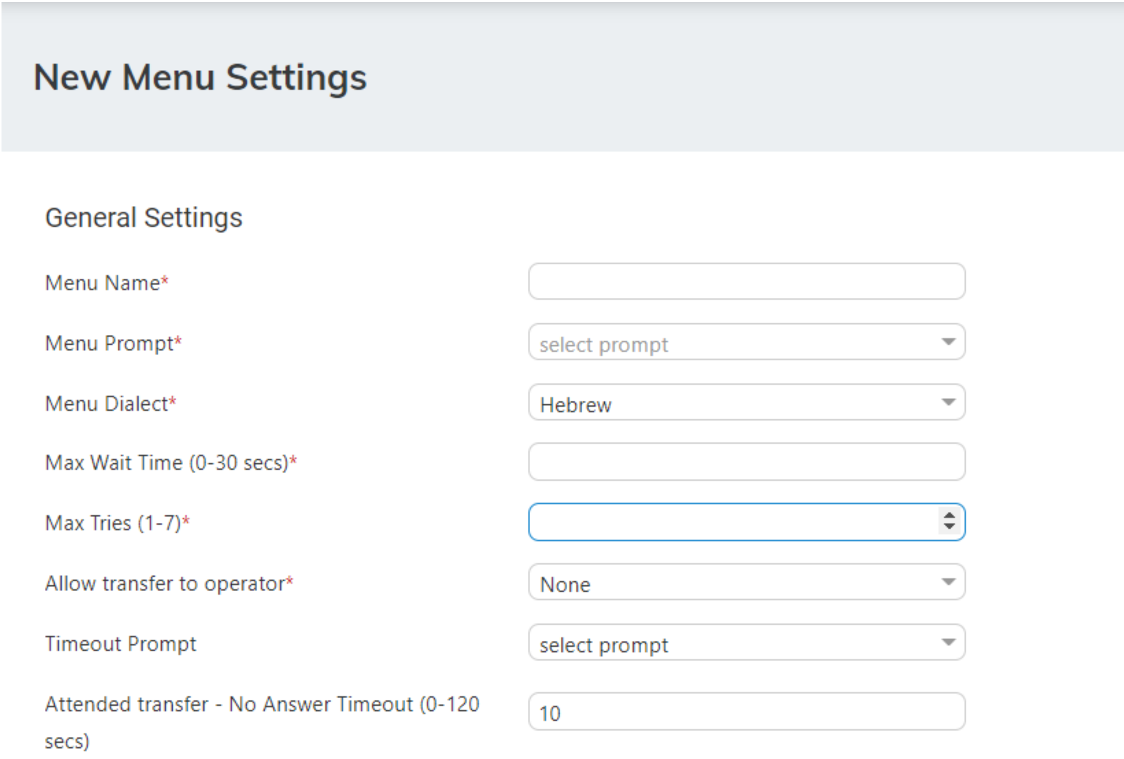
2. Click the **+ Add New** drop-down list; the following screen appears:

Figure 7-14: Add New Options



3. Click **+ New DTMF Menu**; the following screen appears:

Figure 7-15: New DTMF Menu Settings



4. From the 'Menu Prompt' drop-down list, select the pre-configured prompt. See Adding a Voice Prompt on page 123 for more information.

5. From the 'Menu Dialect' drop-down list, select the language of the prompts. The system plays the prompts according to the menu dialect selected.

6. In the 'Max Wait Time' field, enter how much time to wait in seconds (0-30) until the user presses the DTMF.

7. In the 'Max Tries' field, enter how many times to repeat the prompts when there no response from the user.

8. In the 'Operator Extension Working Hours' field, enter the Operator's extension during working hours. This field appears only if the 'Allow transfer to operator' field is set to one of the following values:
   - Anonymous
   - Employee
   - All
     In these cases, the 'Operator extension Working Hours' field is mandatory.

9. In the 'Operator Extension Non-Working Hours' field, enter the Operator's extension during non-working hours. This field appears only if the 'Allow transfer to operator' field is set to one of the following values:
   - Anonymous
   - Employee

- All

  In these cases, the 'Operator extension Working Hours' field is mandatory.

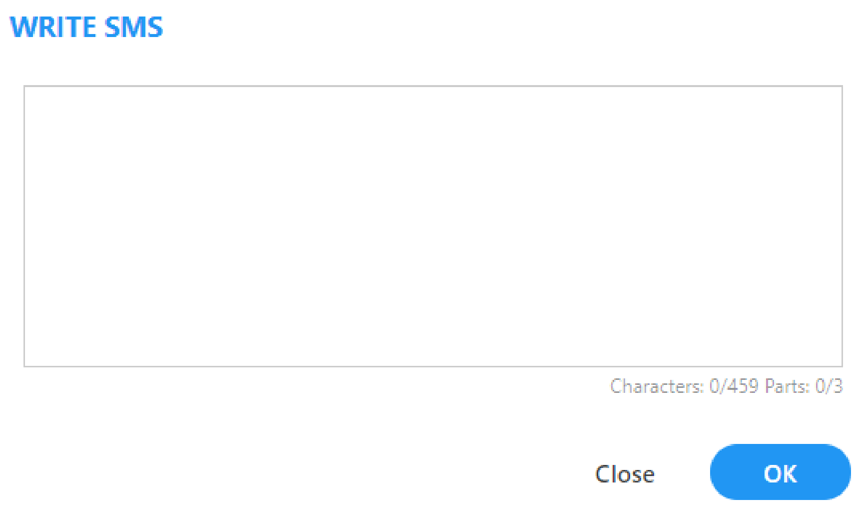
10. From the 'Timeout Prompt' drop-down list, select the prompt in case the user doesn't respond at all and the timeout period expires.

11. Set the 'Attended transfer - No Answer Timeout (0-120 secs)' to the desired value. This parameter is used when 'Attended transfer' is selected as one of the following actions.

12. Under the **Action Settings** group, select the appropriate option:

    - **Do Nothing**
    - **Play prompt:** Plays a specific pre-defined prompt and performs an action.
    - **Go to menu:** Switches the call to a different menu.
    - **Transfer to Operator:** Transfers the call to the operator.
    - **Collect and Dial:** Allows the user to press several DTMFs and once done the call will be transferred to the collected number.
    - **Disconnect:** Disconnects the call.
    - **Transfer to Phone:** Plays a prompt and transfers the call to a pre-defined phone number.
    - **Silent Transfer to Phone:** Does NOT play a prompt and transfers the call to a pre-defined phone number.
    - **Send SMS:** Allows for an SMS message to be sent.
      - From the 'Action 1' drop-down list, select Send SMS.
      - In the 'Action 1 Data' field, click the icon; the following appears:

Figure 7-16: Write SMS



- Write the SMS, and then click **OK**. The SMS is sent out as the first Action Type for the appropriate key.

- Note that the number of characters in the SMS, is limited by the allowed message parts and the language type used.
- Sending an SMS must be followed by an action.

> ⚠ If you have selected **Send SMS** and you are calling from a mobile phone, the SMS is sent directly to your mobile phone. If you are calling from a landline, Voca asks you to enter the mobile number that you wish to receive the SMS on.

> ⚠ The **Send SMS** action is only applicable if the Administrator has given the appropriate permissions.

- **Attended Transfer:** Transfers the call to a predefined number in a supervised way. If the transfer destination is not reachable (e.g., busy, no answer), the next action is performed.
- **Transfer to Queue:** Transfers the call to a predefined call queue.

13. Click **Save Changes**.

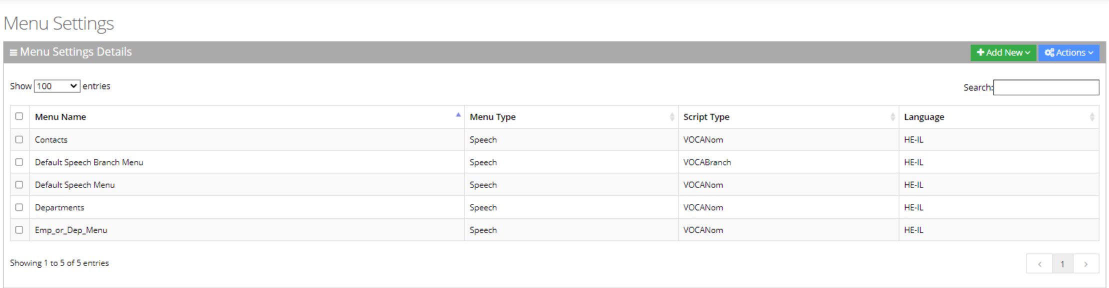
Adding a VocaNOM IVR Speech Menu

You can add a VocaNOM Interactive Voice Response (IVR) speech menu.

➢ To add a VocaNOM IVR speech menu:

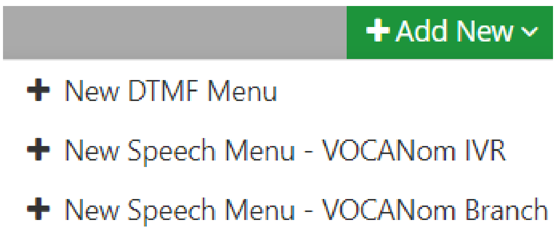
1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following screen example appears.

Figure 7-17: Menu Settings Example



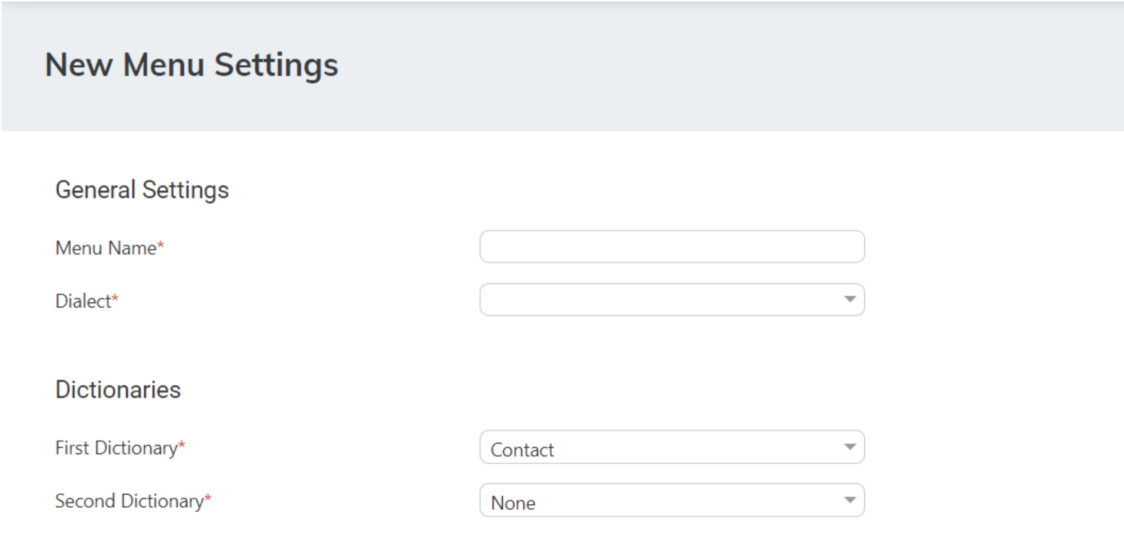
2. Click the **+ Add New** drop-down list; the following screen appears:

Figure 7-18: Add New Options



3. Select **+ New Speech Menu - VOCANom IVR**; the New Menu Settings screen appears:

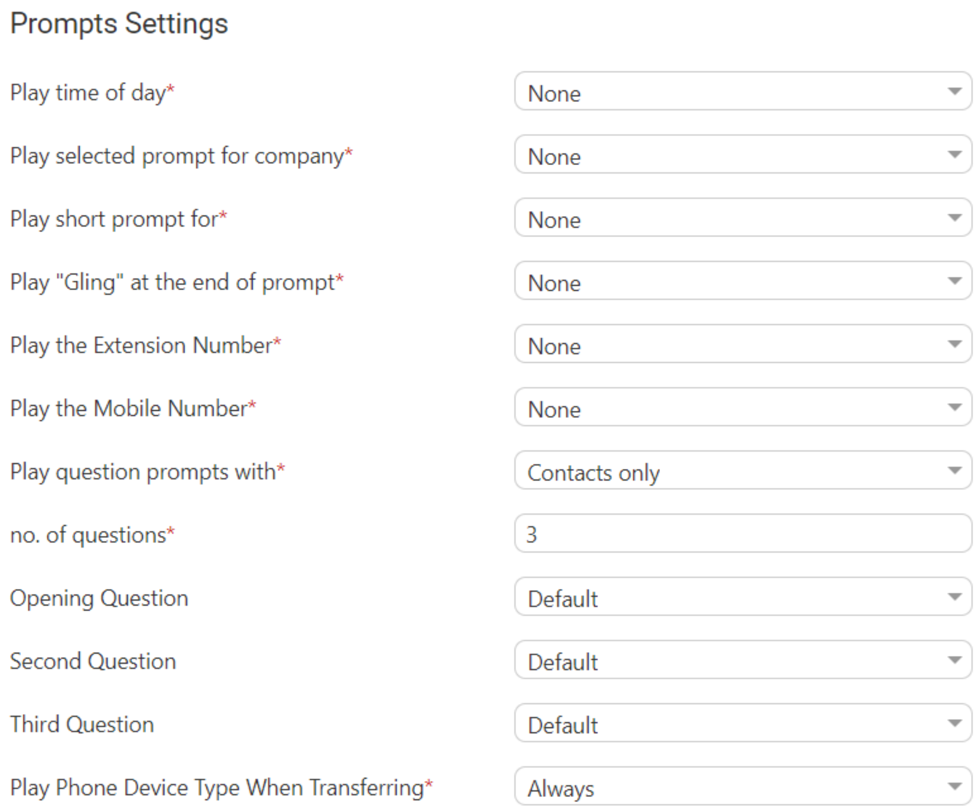
Figure 7-19: Add New Speech Menu Settings



4. Under the **Dictionaries** group, select the First Dictionary and Second Dictionary fields to be used for the menu. The Second Dictionary can be set to "None". The Contact dictionary contains Contact Names without departments. The dictionaries are taken from the Dictionary List in the Department setting that you created.

5. Under the **Prompts Settings** group, select the prompts to play:
   - None
   - Anonymous
   - Employees
   - All

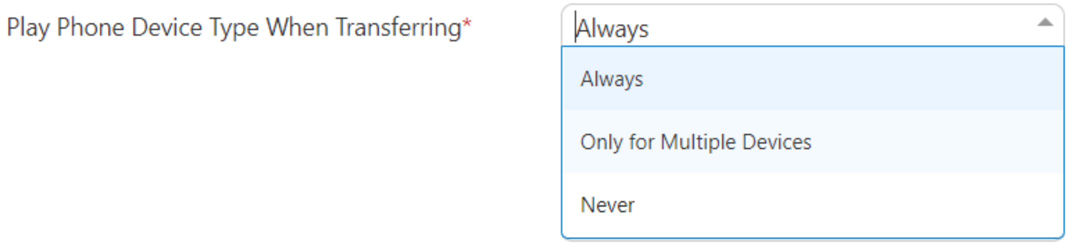
Figure 7-20: Prompts Settings



- ‘Play time of day’: Select which group you are playing the time system menu prompts.
- ‘Play short prompt for’: Select which group you are playing the short prompt to.
- ‘Play Gling at the end of the prompt': Select which group you are playing this to.
- ‘Play the extension number': Select which group you are playing this to.
- ‘Play the mobile number': Select which group you are playing this to.
- ‘Play only number prompt': Select which group you are playing this to.
- ‘Play question prompts with': Select which group you are playing this to:
    - Contacts only
    - Contacts and Departments
    - Departments only
- 'No. of questions' field: Select the number of questions to be asked (1 to 3). This determines how many questions will be asked (opening/second/third questions).
    - 'Opening Question' field: Select **Default** or any other pre-recorded prompt.
    - 'Second Question' field: Select **Default** or any other pre-recorded prompt.
    - From the 'Third Question' drop-down list, select **Default** or any other pre-recorded prompt.

- From the 'Play Phone Device Type When Transferring' drop-down list, select the appropriate value.

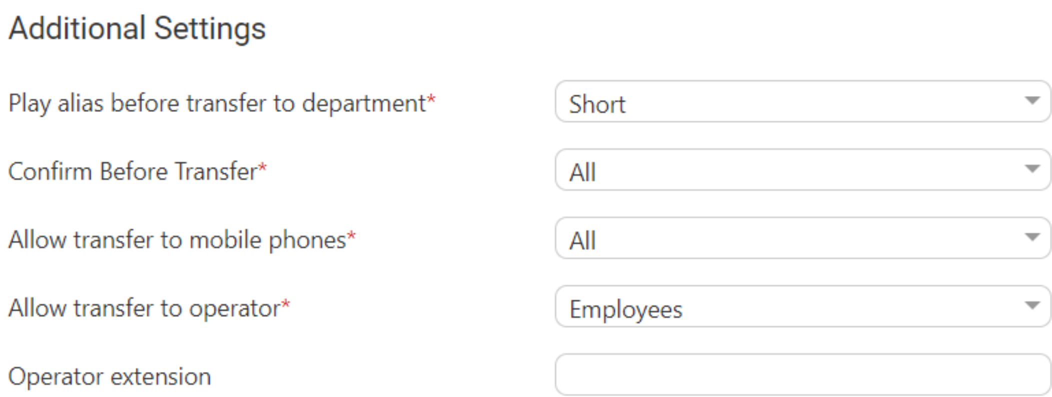
Figure 7-21: Play Phone Device Type



- ◆ **Always**: Play the phone device when transferring a call. For example, "Transferring call to John Doe's mobile" even if the caller said "mobile" specifically or this is the only available number for the contact.
- ◆ **Only for Multiple Devices:** If only a single phone device is available for a contact, do not play the phone device when transferring a call, even if the caller said the phone device (for example," John Doe mobile". Do not play the phone device when transferring). If more than a single phone device is available for a contact, the phone device must be played when transferring a call.
- ◆ **Never:** Never play the phone device when transferring a call.

6. Under the **Additional Settings** group, select the following:

Figure 7-22: Additional Settings



7. 'Play alias before transfer to department' field: select one of the following options:
   - **Short:** If the alias was recognized, the system plays the recognized alias instead of the Department name before the transfer. If there is disambiguation between departments, the alias is played before playing the disambiguation options.
   - **Long:** If the alias was recognized, the system plays the recognized alias and the department name before the transfer. If there is disambiguation between departments, the alias is played before playing the disambiguation options.
   - **Disabled:** Plays only the department name before the transfer. If there is disambiguation, only disambiguation options are played.

8. 'Confirm Before Transfer' field: Select which group you are playing this to. If not 'None', the relevant group is asked to confirm the entity they are going to be transferred to.

9. 'Allow transfer to mobile phones' field: Select which group you are allowing to transfer calls to mobile devices.

10. 'Allow transfer to operator for' field: Select to whom you are allowing to transfer calls to the operator. The 'Operator extension' field appears only if the 'Allow transfer to operator' field is set to one of the following values:

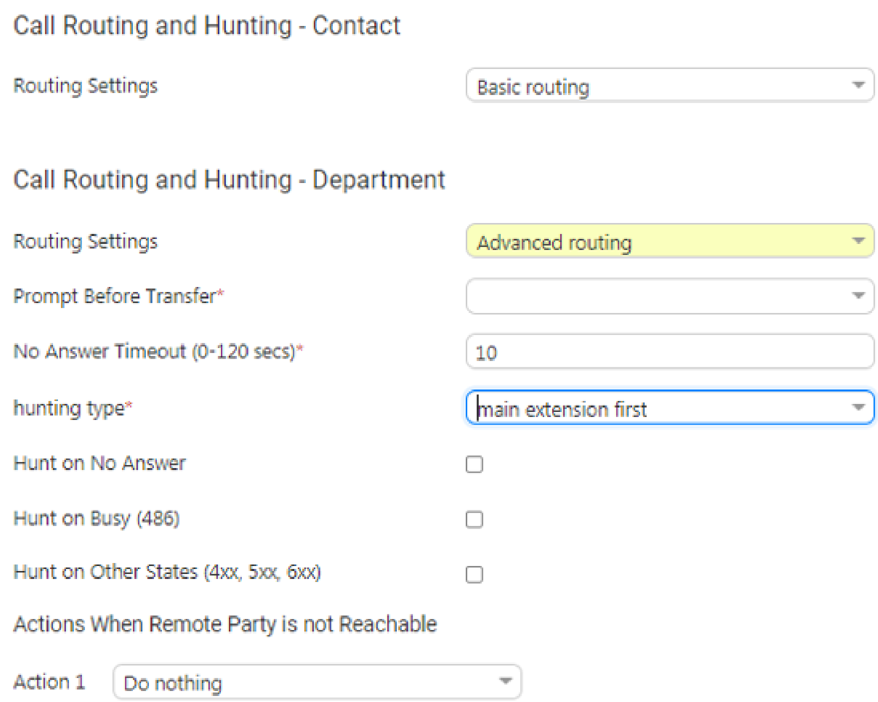
    - Anonymous
    - Employee
    - All

> ⚠ The 'Operator extension' field is mandatory is you select any of the above values.

11. . 'Operator extension' field: Select the number to dial when the user presses "0" or says "operator".

12. Under the **Call Routing and Hunting - Contact** group, enter the following:

Figure 7-23: Call Routing and Hunting - Contact



13. . From the 'Routing Settings' drop-down list, select either:

    - **Basic routing (default):** The call routing process remains as it is currently set.
    - **Advanced:** The call is set according to the following parameters:

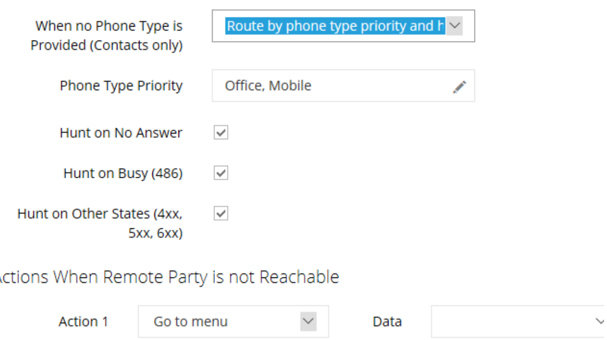
14. From the 'Prompt Before Answer' drop-down list, select a prompt from a list of available prompts, before the call is transferred.

15. In the 'No answer timeout (0-120 secs)' field, set the time you want the system to wait for the remote side to answer the call before moving to the next phone type, when hunting or doing an action when the remote party is not reachable.

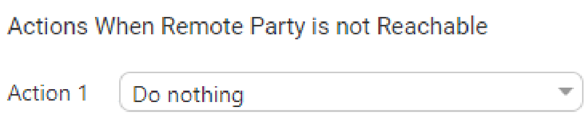
16. From the 'When no Phone Type is Provided' drop-down list, select the appropriate action. When the caller says a Contact’s name without requesting a specific phone type, the system can be configured to behave in several different ways:

    - The system asks the caller to choose a Phone Type it plays to the caller. Voca transfers the call to the highest priority phone type defined in configuration. If the first priority phone type is not available for a contact, the call is transferred to the second, or third priority. This phone type priority list is configurable.
    - Voca can perform Call Hunting based on the phone type priority list. Configure which of the following states performs the hunting:
        - Busy
        - No Answer
        - Other

Figure 7-24: When no Phone Type is Provided



17. When Voca transfers a call to a destination, the remote side (whether it is a contact or a department) may not be reachable. In such a case, Voca performs pre-defined actions. Under the **Actions when Remote Party is not Reachable** group, from the 'Action 1' drop-down list, select the appropriate value.

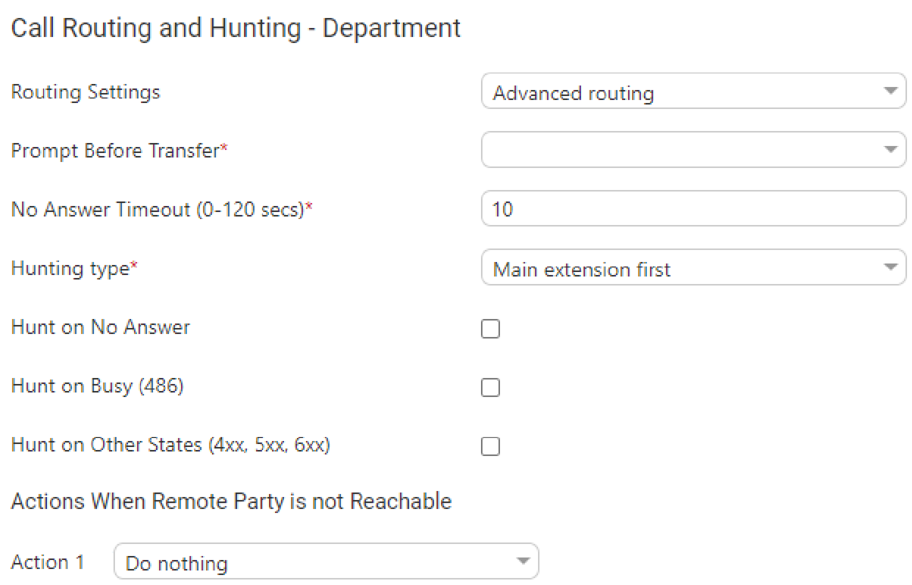


- Do nothing
- Play prompt
- Go to menu
- Transfer to Operator

- Disconnect
- Transfer to Phone
- Send SMS
- Missed Calls Notification: Enables Voca contacts to be notified via email whenever a caller tries to reach a contact without success. When a caller tries to reach a contact destination that is not available and the Missed Call Notification action was selected, Voca prompts the caller to leave a voice message (if the action was configured with the 'Record' option). Immediately after the caller ends the call, the destination contact receives an email with the call details – caller and date and time of the call. If a voice message was left by the caller, the recording is attached to the email received by the destination contact.

18. Under the **Call Routing and Hunting - Department** group, enter the following:

Figure 7-25: Call Routing and Hunting - Department



19. From the 'Routing Settings' drop-down list, select either:
   - **Basic routing (default):** The call routing process remains as it is currently set.
   - **Advanced:** The call is set according to the following parameters:
     - From the 'Prompt Before Answer' drop-down list, select a prompt from a list of available prompts, before the call is transferred.
     - In the 'No answer timeout (0-120 secs)' field, set the time you want the system to wait for the remote side to answer the call before moving to the next phone type, when hunting or doing an action when the remote party is not reachable.
     - From the 'Hunting type' drop-down list, select one of the options:

       *** Main extension first:** Select this option when hunting for a free extension always start from Extension 1.

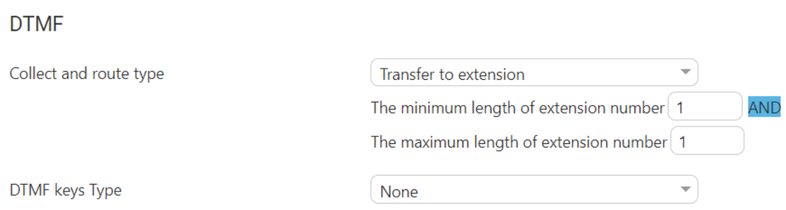
*** Round robin:** Select this option when hunting for a free extension. Always start from the extension following the last one used.

20. Under the **Actions when Remote Party is not Reachable** group, from the 'Action 1' drop-down list, select the appropriate value. When Voca transfers a call to a destination, the remote side (whether it is a contact or a department) may not be reachable. In such a case, Voca performs pre-defined actions:

- Do nothing
- Play prompt
- Go to menu
- Transfer to Operator
- Disconnect
- Transfer to Phone
- Send SMS
- Missed Calls Notification: Enables a Voca department to be notified via email whenever a caller tries to reach a department without success. When a caller tries to reach a department destination that is not available and the Missed Call Notification action was selected, Voca prompts the caller to leave a voice message (if the action was configured with the 'Record' option). Immediately after the caller ends the call, the destination department receives an email with the call details – caller and date and time of the call. If a voice message was left by the caller, the recording is attached to the email received by the destination contact.

21. Under the **DTMF** group, from the 'Collect and route type' drop-down list, select the appropriate value. This is used to collect and route by one or more digits:

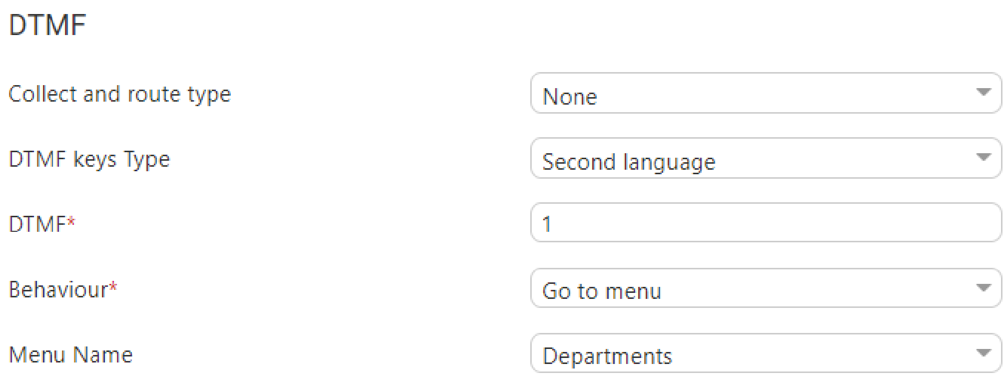
Figure 7-26: DTMF Group



- **None:** Functionality is disabled.
- **Transfer to extension**: Instead of saying a contact/department name, you can enter the entity phone number by DTMF and selecting either:
  - Minimum length of extension number
  - Maximum length of extension number
- **Transfer by DTMF routing key:** The collected digits are used to route the call to the contact or department tagged with the same DTMF routing key.

22. From the 'DTMF keys Type' drop-down list, select the appropriate option. This is used to navigate using single DTMF key. If this option is activated, the 'Collect and route type' field cannot be configured to collect only one digit. Select one of the following:

- **None:** Functionality is disabled.
- **Second language:** Defines how to handle a second language. If you select this option, the following fields become available:



  - **DTMF:** Configures the DTMF key that is pressed to trigger the required behavior.
  - **Behavior:** Defines the behavior of the DTMF key:

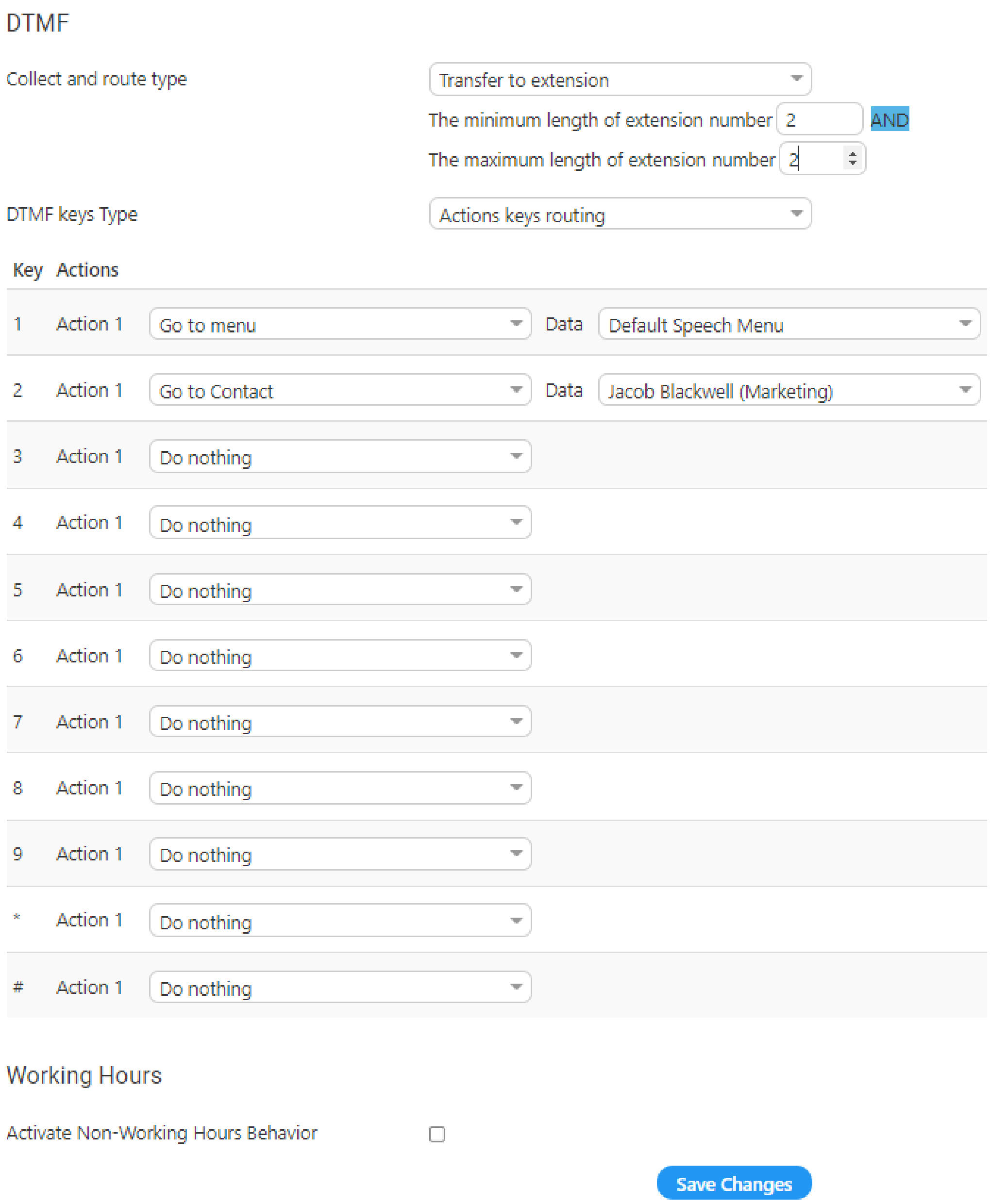
    * **Operator:** The call is diverted to the operator.
    * **Flow:** This value has been deprecated.
    * **Go to menu:** The call is diverted to another menu.

  - **Menu Name:** Defines the name of the menu, if the 'Behavior' field option is **Go to menu**.

23. From the 'DTMF keys Type' drop-down list, select **Actions key routing**. This option maps actions for DTMF keys.

> Action 0 is used by the operator.

Figure 7-27: DTMF Actions



The following is a list of allowed actions:

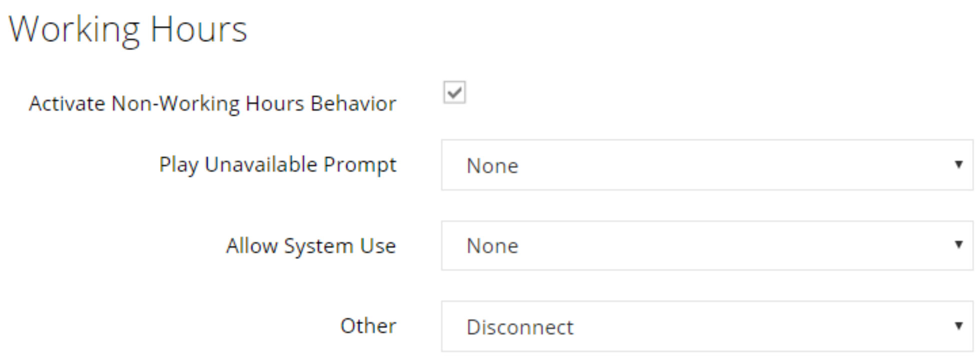
- **Do Nothing:**
- **Go to menu:** Defines which menu to go to.
- **Go to Contact:** Defines which contact the call is being transferred to.
- **Go to Department:** Defines which department the call is being transferred to.

24. Under the **Working Hours** group, select the 'Activate Non-Working Hours Behavior' check box; the following fields appear:

- **Play Unavailable Prompt:** This prompt plays a message to inform the caller that the extension is unavailable.

- **Allow System Use:** This option is used when you don't want to play the 'Play Unavailable Prompt', and rather use the system.
- **Other:** This refers to the system behavior of those not defined in 'Allow System Use'.

Figure 7-28: Add New Speech Menu Settings - Working Hours



25. Click **Continue**.

Adding a VocaNOM Branch Speech Menu

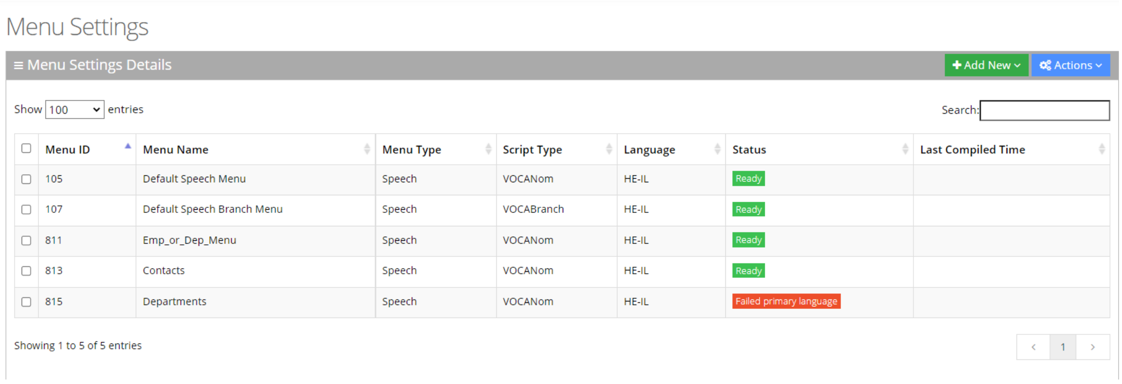
You can add a VocaNOM Branch speech menu.

➢ To add a VocaNOM Branch Speech menu:

1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following screen example appears.

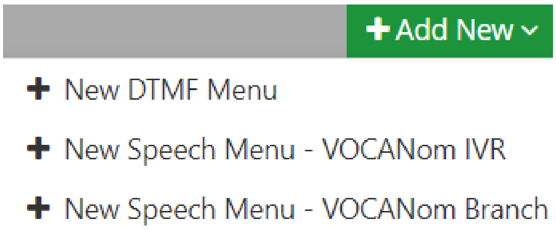
Figure 7-29: Menu Settings Example

Figure 7-30:



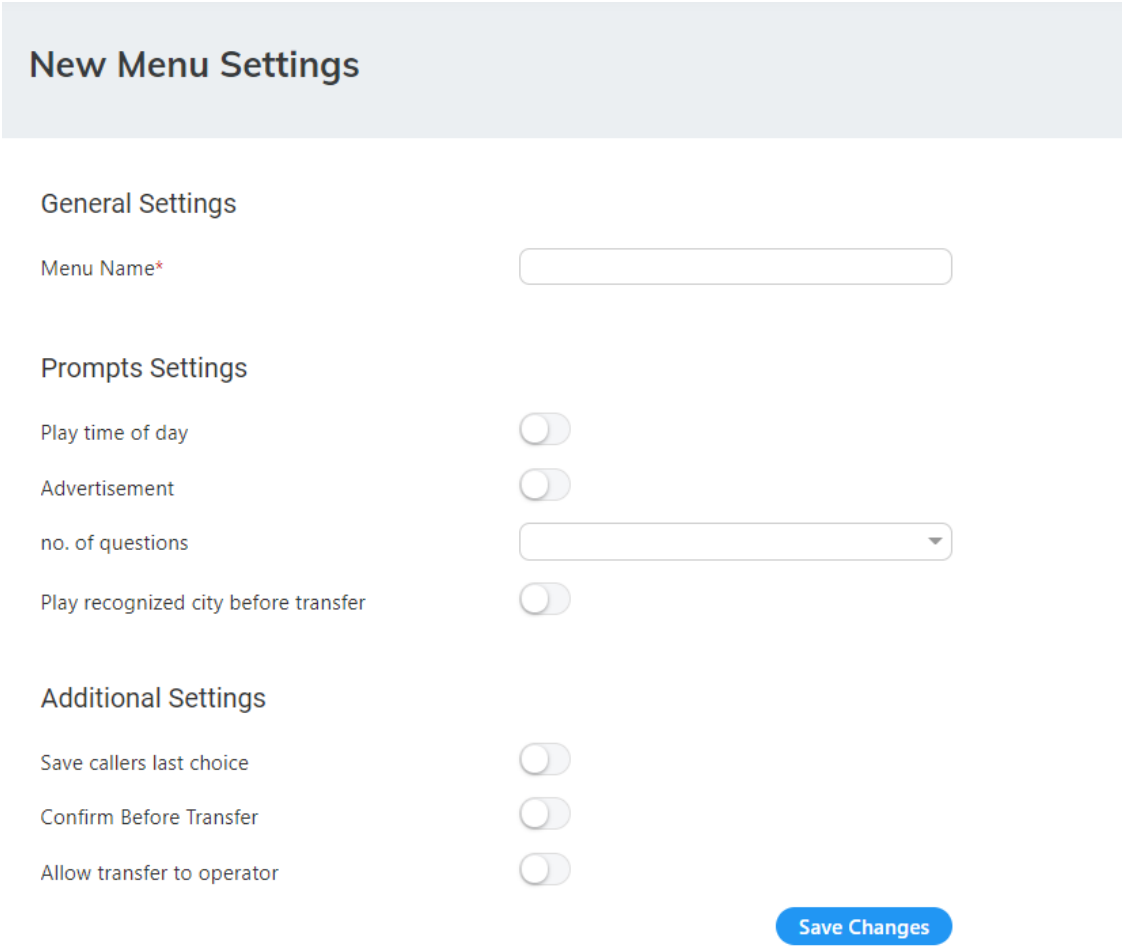
2. Click the **+ Add New** drop-down list; the following screen appears:

Figure 7-31: Add New Options



3. Select **+ New Speech Menu - VOCANom Branch**; the New Menu Settings screen appears:

Figure 7-32: New Menu Settings - VocaNOM Branch



4. Click the **Play time of day** toggle switch for the system to play the time period of the day (e.g., Good morning, Good afternoon).
5. Click the **Advertisement** toggle switch for the system to play an advertisement (e.g., company's jingle, announcement for a new product).
6. In the 'No. of questions' field, enter the number of questions to be asked (1 to 3). This determines how many questions are asked (opening/second/third questions).
   a. From the 'Opening Question' field, select "Default" or any other pre-recorded prompt.
   b. From the 'Second Question' field, select "Default" or any other pre-recorded prompt.
   c. From the 'Third Question' field, select "Default" or any other pre-recorded prompt.

7. Click the **Play recognized city before transfer** toggle switch to repeat the city requested before transfer. In case of branch disambiguation, the requested city is played before playing disambiguation options.
8. Under the **Additional Settings** group, click the **Save caller last choice** toggle switch to automatically transfer the call to the previously requested destination.
9. Click the **Confirm Before Transfer** toggle switch to ask the caller to confirm the destination before the call is transferred.
10. Click the **Allow transfer to operator** toggle switch to allow the system to transfer calls to the operator.
11. Click **Save Changes**.

Editing Menu Settings

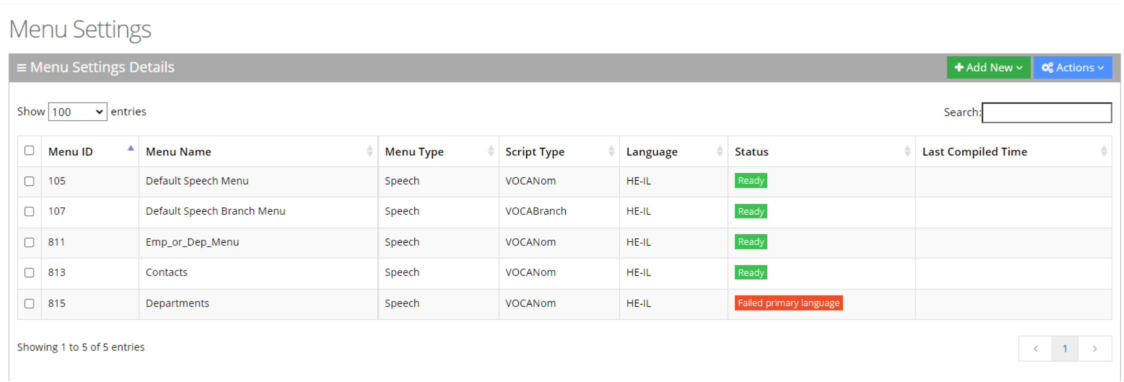
The procedure below describes how to edit menu settings.

➢ To edit menu settings:

1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following screen example appears:

Figure 7-33: Menu Settings Example

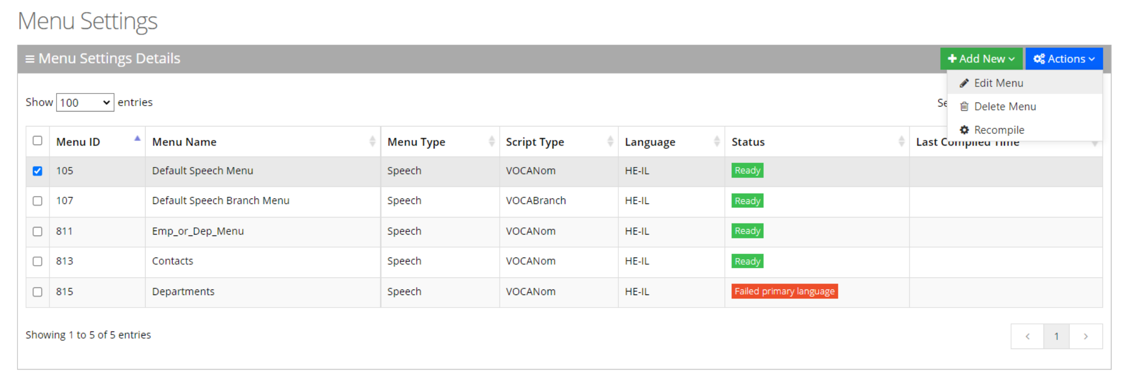
Figure 7-34:



2. Enable the menu check box that you wish to edit.
3. Click **Actions**; the following screen appears:

Figure 7-35: Select Menu Settings - Edit

Figure 7-36:



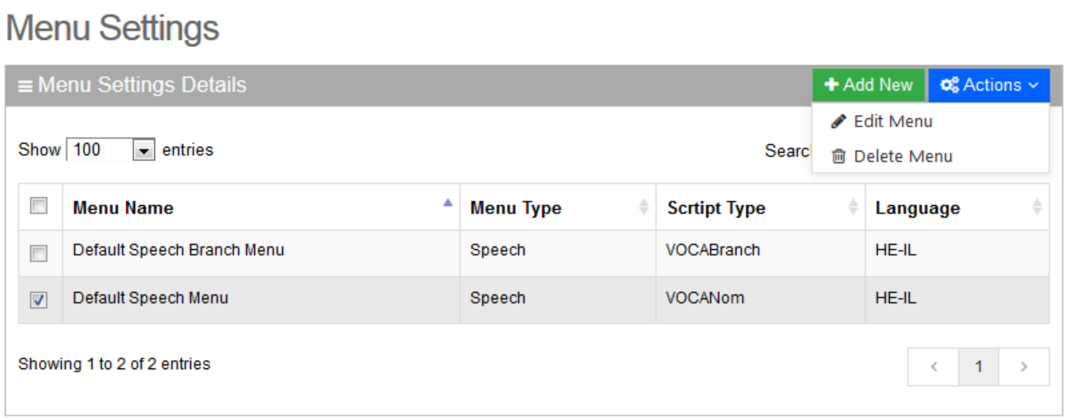
4. Select **Edit Menu**.
5. Edit the fields you want to change.
6. Click **Continue**.
7. Click **Save Changes**.

Deleting Menu Settings

➢ To delete menu settings:

1. Enable the menu check box that you wish to delete.
2. Click **Actions**; the following screen appears.

Figure 7-37: Select Menu Settings



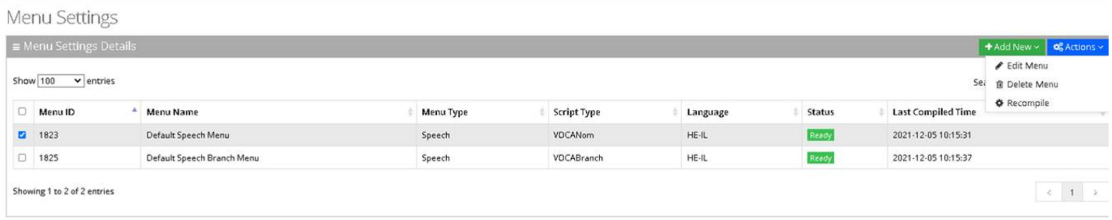
3. Select **Delete Menu**.
4. The following message appears: 'Are you sure you want to delete the selected menu?'
5. Click **OK** to delete the selected menu; a message appears that the menu was successfully deleted.

Recompile Menus

Speech menus (IVR and Branch) that include phrase list for recognition, must be compiled to support the recognitions. Compilation is done automatically in the background but can also be triggered by the customer. The procedure below describes how to compile menus.

➢ **To recompile menus:**

1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following appears:
2. Enable the menu check box that you wish to recompile.
3. From the 'Actions' drop-down list, select **Recompile**.



The following columns show the compilation status:

- **Status:** Displays the menu compilation status. It can be one of the following:
  - **Pending:** Waiting for compilation
  - **In progress**: Compilation is now in progress
  - **Ready**: Compilation is done
  - **Failed**: Compilation failed
  - **Failed for second language:** If a second language is defined for the tenant and menu compilation failed
- **Last compilation time:** Last time of menu compilation

4. To trigger a new compilation, select **Actions,** and then click **Recompile**.

Defining Working Hours

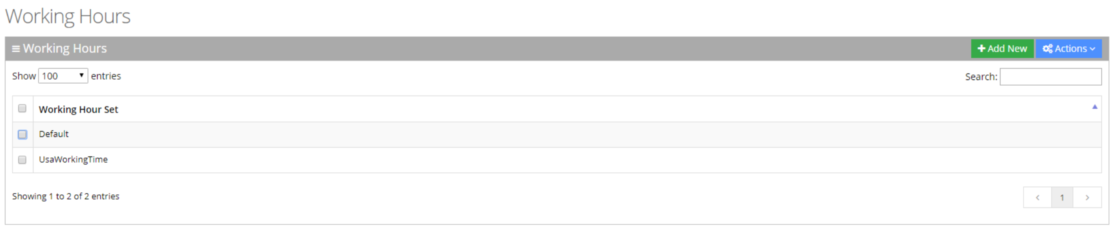
The system supports defining several sets of working hours per customer/service to allow the definition of different non-working and working time. By default, every customer/service has one working time set which can't be deleted.

Adding Working Hour Set

➢ **To add a new working hours set:**

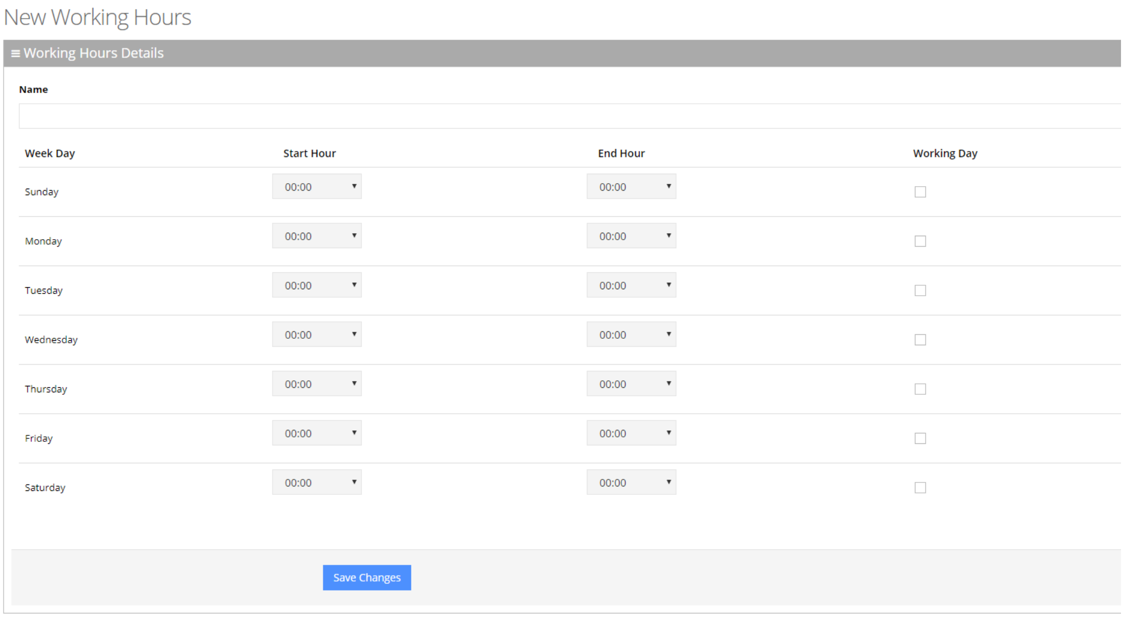
1. Open the Working Hours Details screen (**Configuration** > **Working Hours**); the following screen appears:

Figure 7-38: Add Working Hours Set



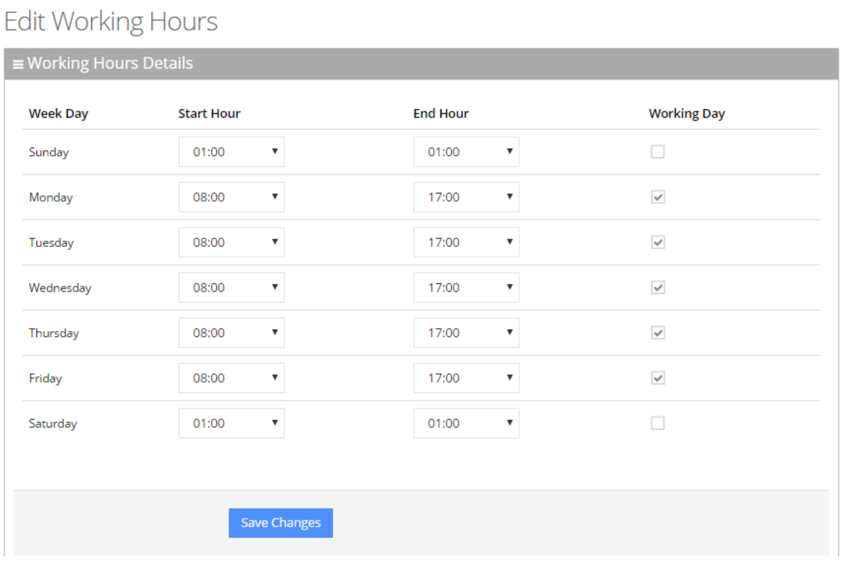
2. Click **"+Add New"**; the following screen appears.

Figure 7-39: Add Working Hours Set



3. Enter the working hour set name.
4. Define the working days and hours, by selecting the check box of each appropriate working day.
5. Select the 'Start Hour' and 'End Hour' for each applicable day.
6. Click **Save Changes**.
7. In the following example, we have defined the company's working days as Monday till Friday from 8:00 till 17:00.

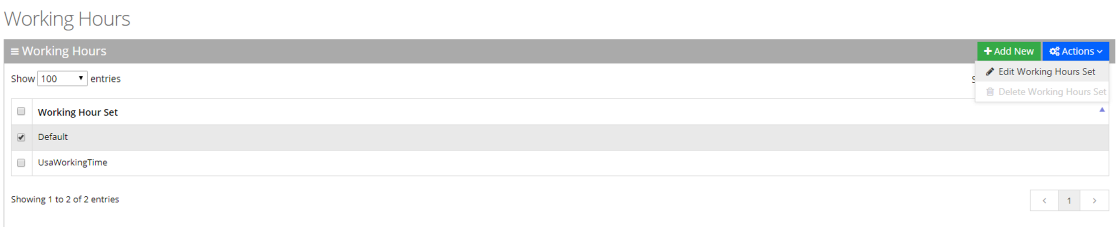
Figure 7-40: Edit Working Hours Details



Editing Working Hour Set

1. Select the working hour that you wish to edit.
2. Click **Actions**; the following screen appears.

Figure 7-41: Edit Working Hours Set

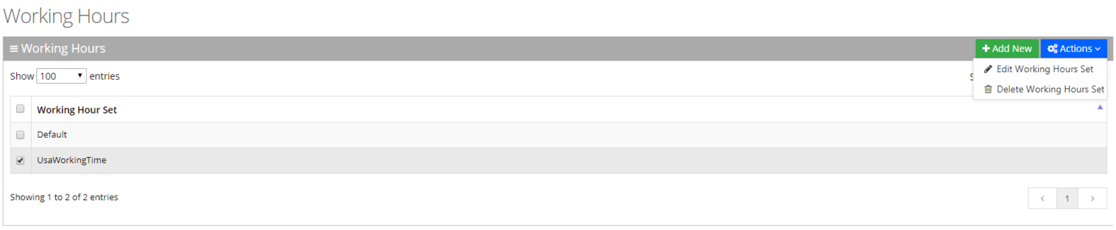


3. Select the **Edit Working Hours Set Menu**.
4. Edit the working days and hours, by selecting the check box of each appropriate working day.
5. Edit the 'Start Hour' and 'End Hour' for each applicable day.
6. Click **Save Changes**.

Deleting Working Hours Set

1. Select the working hour that you wish to delete.
2. Click **Actions**; the following screen appears.

Figure 7-42: Deleting Working Hours Set



3. Select the **Delete Working Hours Set Menu**.
4. Edit the 'Start Hour' and 'End Hour' for each applicable day.

Defining Events and Holidays

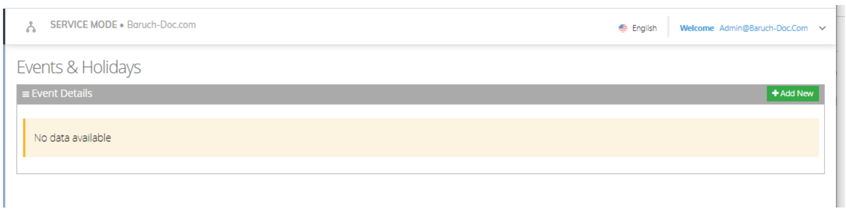
The procedure below describes how to configure Voca to define special corporate events and holidays in the system calendar. This allows for a more efficient way of defining working time.

Adding Events and Holidays

➢ To add events and holidays:

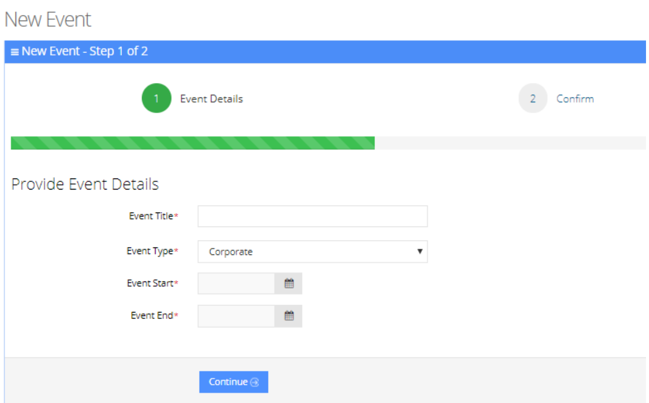
1. Open the Events & Holidays Details screen (**Configuration** > **Events & Holidays**); the following screen appears:

Figure 7-43: Events and Holidays



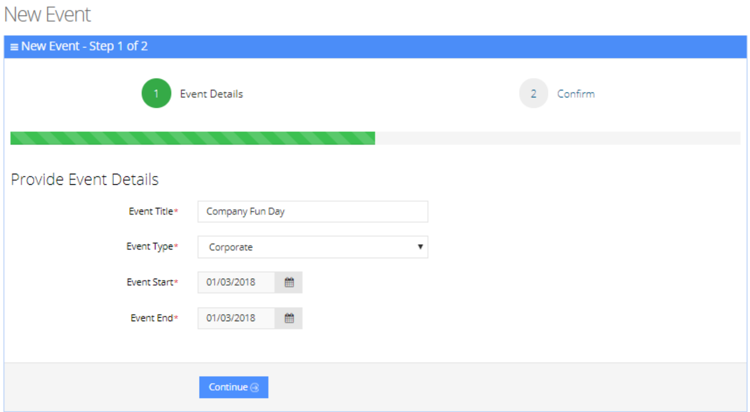
2. Click **"+Add New"**; the following screen appears:

Figure 7-44: Provide Event Details



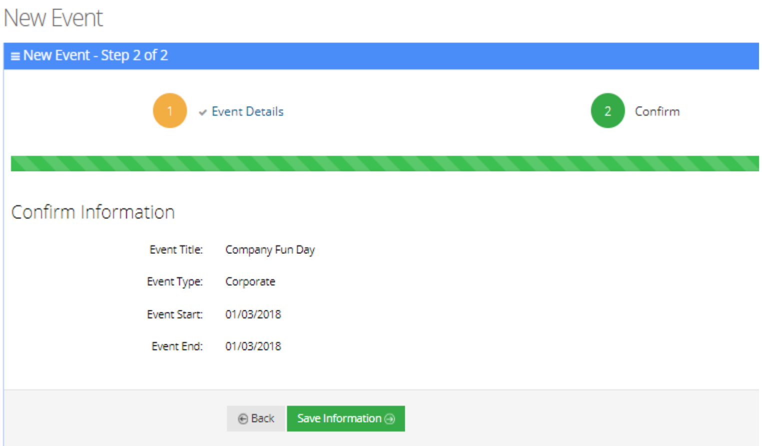
3. Enter the event details. Event Type can either be “Corporate” or “Holiday”.

Figure 7-45: Provide Event Details Example



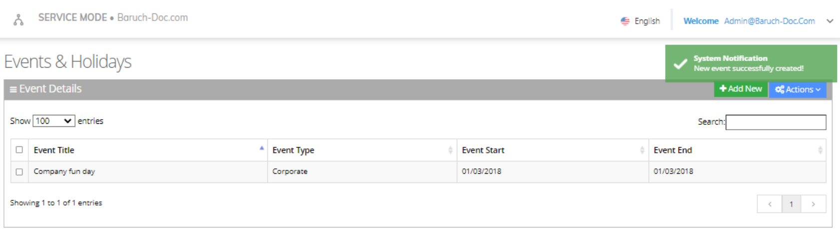
4. Click **Continue**.

Figure 7-46: Confirm Information



5. Click **Save Information** to confirm your details; “New event successfully created” message appears.

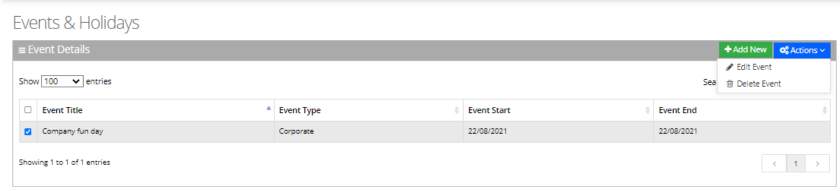
Figure 7-47: Add Event Successfully Updated



Editing Events and Holidays

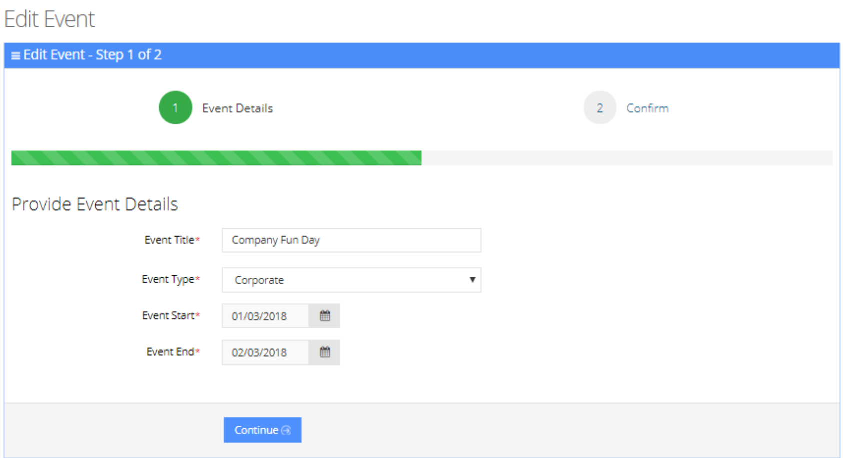
1. Select the event or holiday that you wish to edit.
2. Click **Actions**; the following screen appears:

Figure 7-48: Edit Events and Holidays



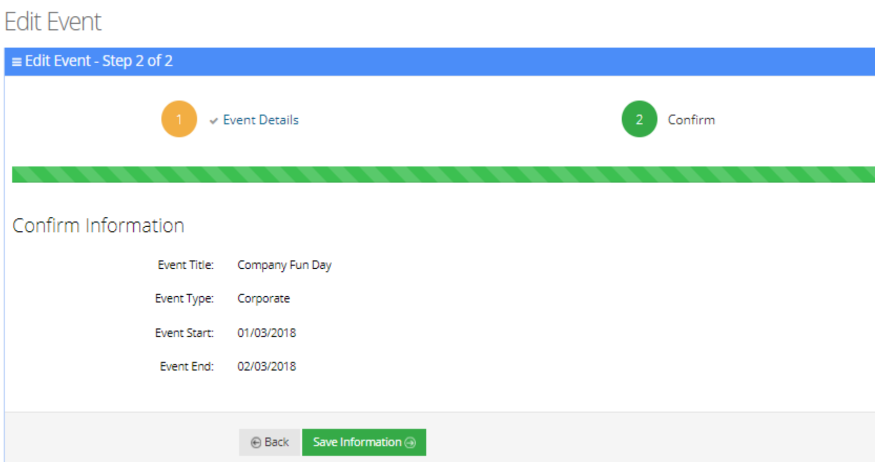
3. Select **Edit Event**.

Figure 7-49: Provide Event Details



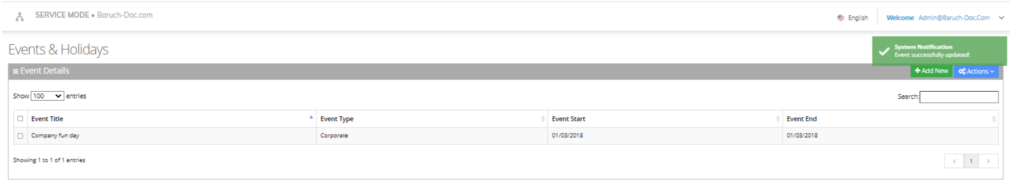
4. Edit the necessary information.
5. Click **Continue**.

Figure 7-50: Confirm Edit Information



6. Click **Save Information** to confirm your details; “Event Successfully Updated” message appears.

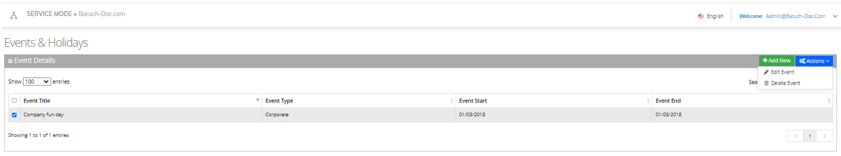
Figure 7-51: Edit Event Successfully Updated



Delete Events and Holidays

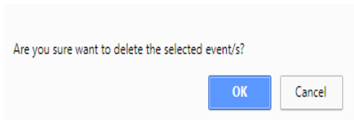
1. Select the event or holiday that you wish to delete.
2. Click **Actions**; the following screen appears:

Figure 7-52: Edit Events and Holidays



3. Select **Delete Event**; the following message appears:

Figure 7-53: Want to Delete?



4. Click **OK**; the following screen appears:

Figure 7-54: Event Successfully Deleted

Defining Additional Employees

The procedure below defines the system behavior for adding additional employees to the organization.

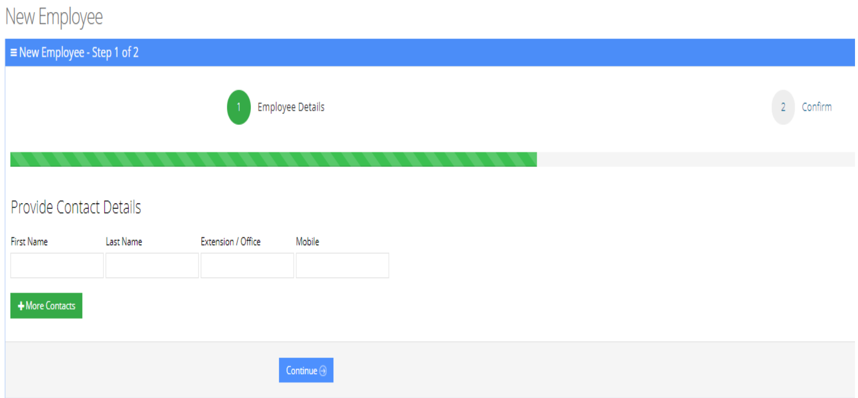
Configuring additional employees allows the organization administrator to add more contacts which will not be included in the organization's contact list. These additional employees will not be reached through voice dialing, but will be part of the organization and will be provided with employee privileges (i.e., the same configuration that is set for employees).

➢ **To define the additional employees:**

1. Open the Additional Employees Details screen (**Configuration** > **Additional Employees**).

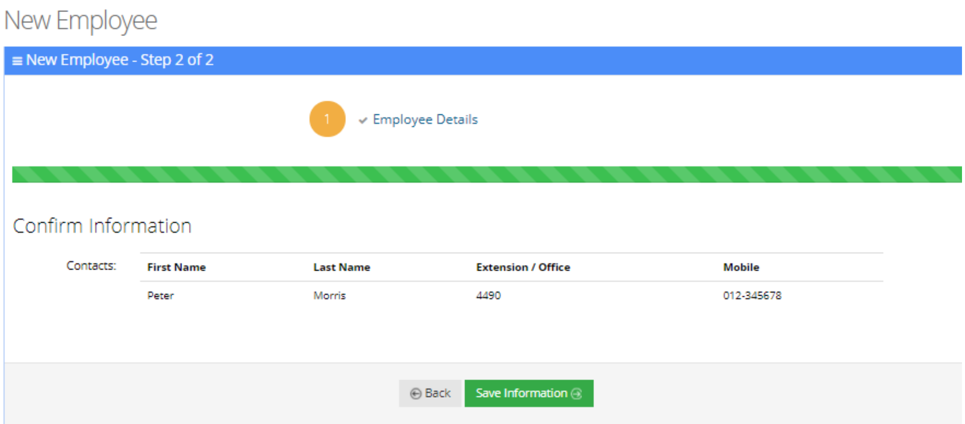
2. Click **Add New**; the following screen appears:

Figure 7-55: New Employee Details



3. Under the **Provide Contact Details** group, enter the following:
   - First Name
   - Last Name
   - Extension/Office
   - Mobile
4. Click **Continue**.

Figure 7-56: New Employee Information



5. Click **Save Information**.

Configuring System Settings

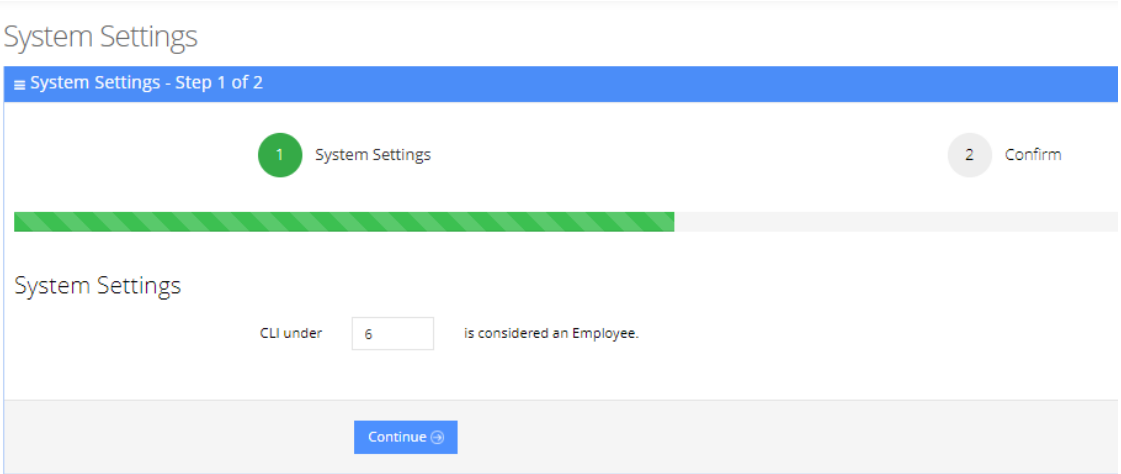
The procedure below defines the length of the Caller ID (CLI) field which is used to determine valid employee numbers.

➢ **To configure the CLI:**

1. Open the System Settings screen (**Configuration** > **System Settings**).

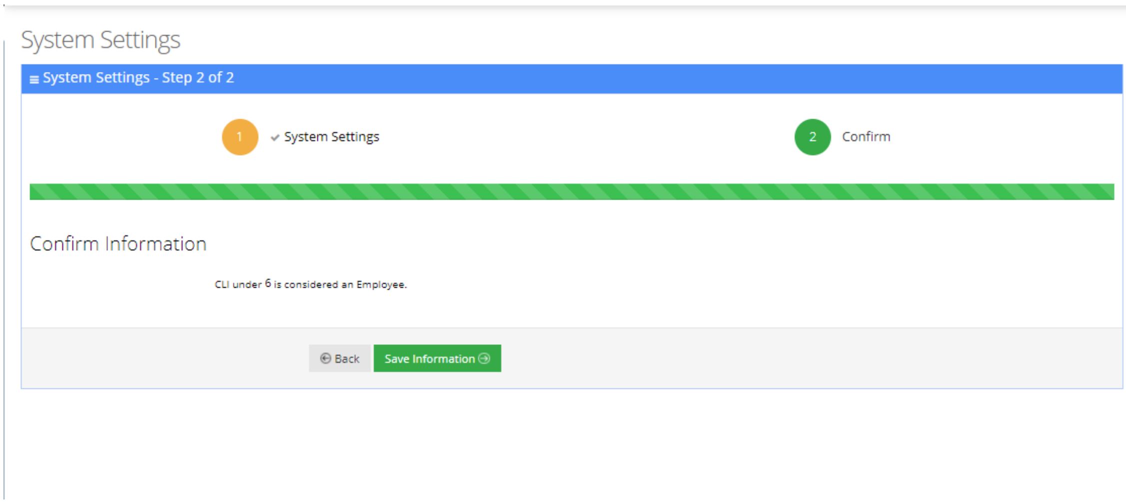
2. Set the CLI to the number of desired digits.
   In the example below, the CLI is set to be six digits or under. Any Caller ID that is up to six digits long is considered a valid employee number.

Figure 7-57: System Settings



3. Click **Continue**.

Figure 7-58: System Settings - Confirm Information



4. Click **Save Information**.

Defining Call Queues

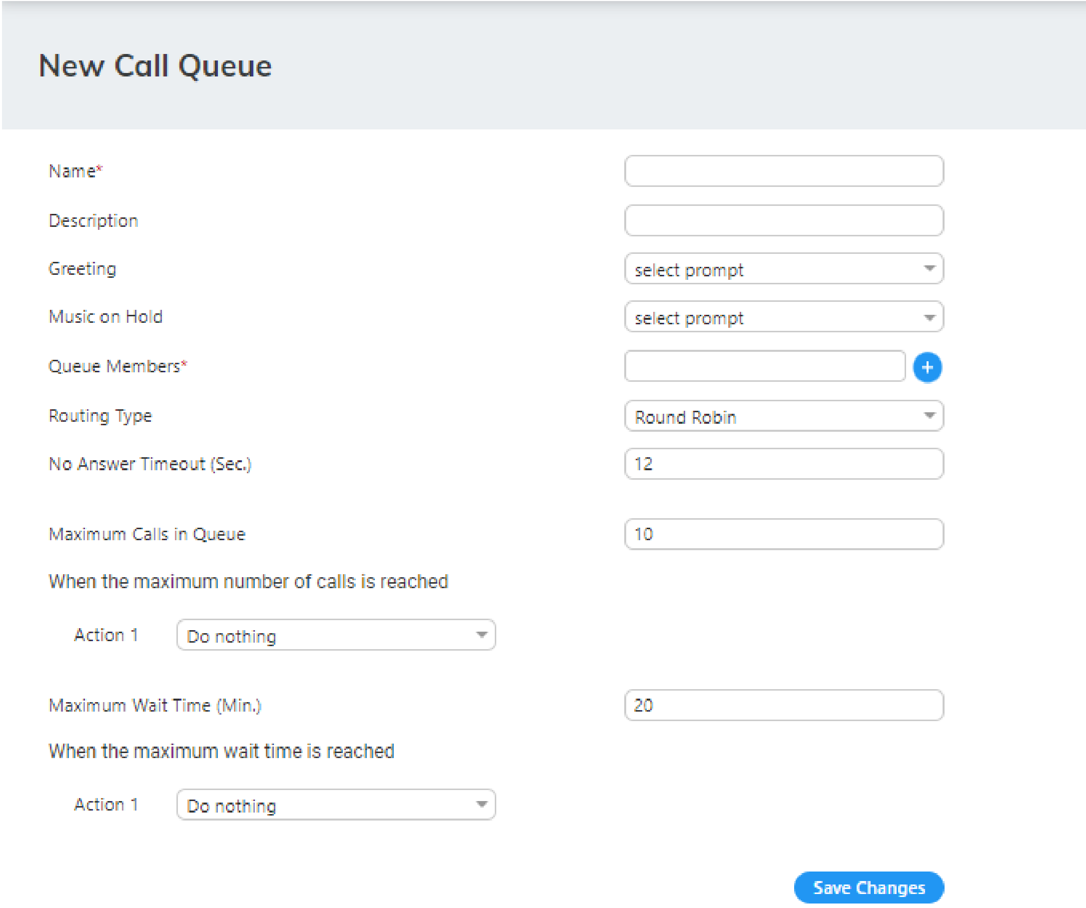
Call queues provide the ability to place an incoming call in a queue before transferring it to one of its destination lists. When the call is in a queue, the caller hears music on hold. The system supports defining several call queues per customer or service.

Call Queue activation requires the relevant SBC configuration. For more information, refer to the *Voca Installation Manual*.

➢ To define a new Call Queue:

1. Open the New Call Queue screen (**Configuration** > **Call Queues**).

2. Click **Add New**; the following screen appears:



Call Queue properties include the following:

- **Name:*** Mandatory unique name for the queue.
- **Description:** Short description for the queue.
- **Greeting:** Prompt to be played when the call enters the queue. Select the prompt from the Prompts List.
- **Music on Hold:** Music on hold to be played to the caller while the call is waiting in the queue. Select the prompt from the Prompts List.
- **Queue Members:** A list of destinations which the calls from the queue will be transferred to.
- **Routing Type:** The method of searching for an available destination. It includes two options:
  - Round robin (default)
  - Serial

- **No Answer Timeout (Sec.):** The ringing time at the destination after which the call is considered as not answered by the destination.
- **Maximum Calls in Queue:** The maximum number of calls in the queue between 1 and 99. When the maximum number of calls has been reached, the configured actions will be activated. Up to three configurable actions are available.

This limit requires the same or higher licensed channels.

- **Maximum wait time (Min.):** The maximum time for a call to be waiting in the queue. When the waiting time exceeds this limit, the configured actions are activated. Up to three configurable actions are available.

Deleting Call Queues

When deleting a queue, the system checks if the queue is already used in any related transfer to queue actions.

If the queue is in use, the delete request is denied with an appropriate message.

Configuring LDAP Settings

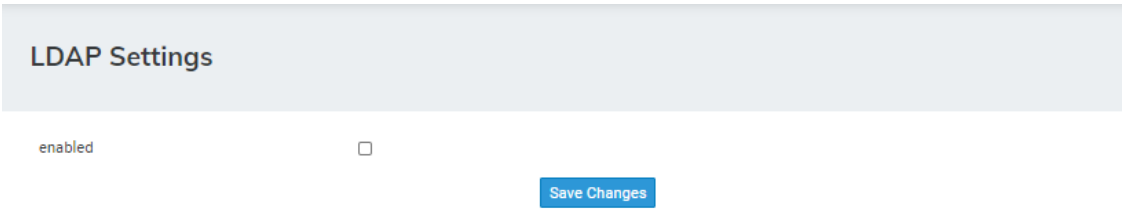
This section describes how to configure Lightweight Directory Access Protocol (LDAP) synchronization for Voca On-premises and Voca Cloud installations.

If you are using a standalone LDAP client installed on-premises and used to update the Cloud service, see Configuring Voca LDAP Synchronization on page 166.

➢ **To configure LDAP:**

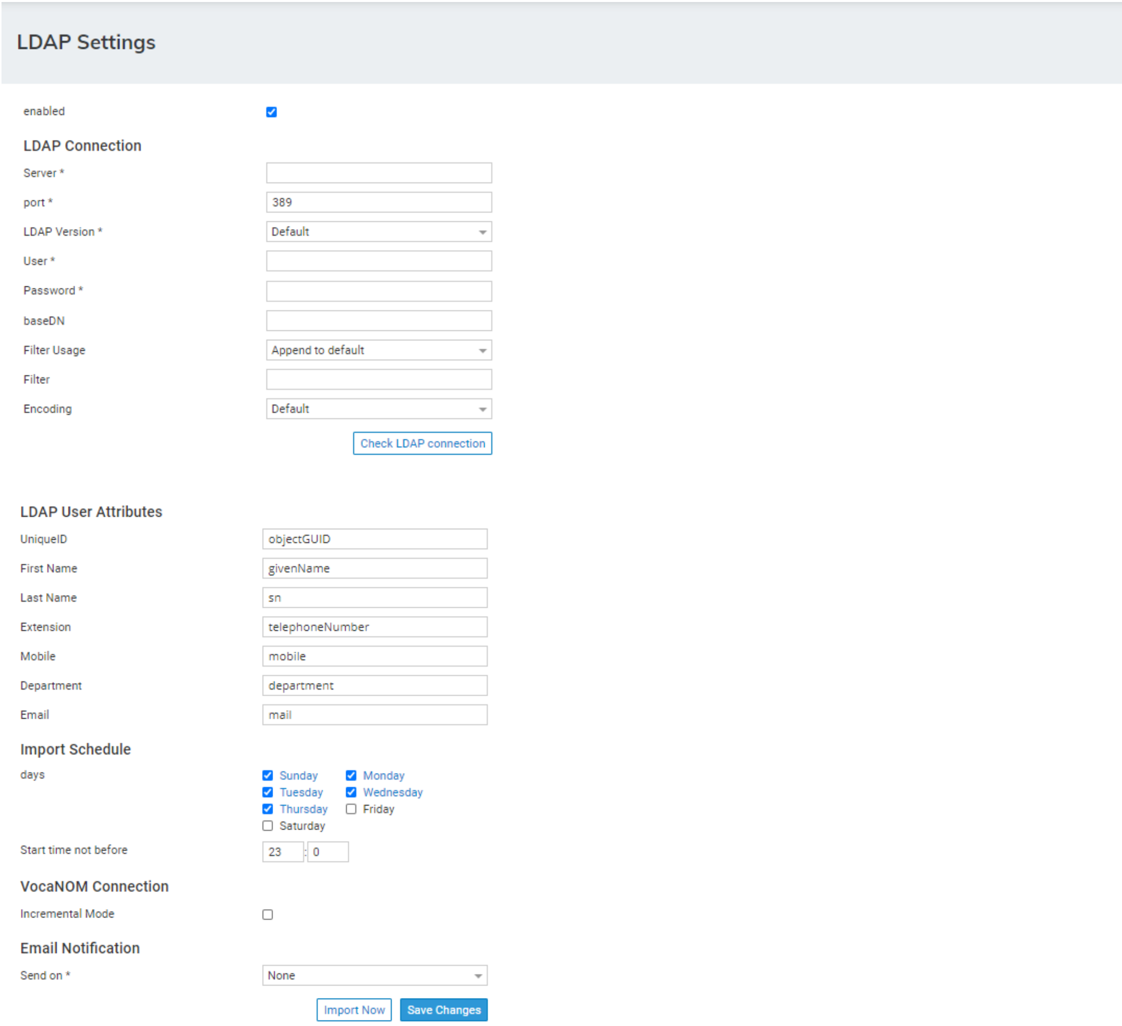
1. Open the LDAP Settings screen (**Configuration** > **LDAP Settings**).

Figure 7-59: LDAP Settings



2. Select the 'enabled' check box.

Figure 7-60: LDAP Settings - Save Changes



3. Enter the following fields for LDAP Connection settings:

- **Server:** Defines the URL of the VocaNOM server. It can include either FQDN or an IP address.
- **Port:** Defines the port of the URL – either '80' for HTTP or '443' for HTTPS.
- **LDAP Version:** Defines the LDAP version number - Default, 2 or 3
- **User:** Defines the Service Administrator name.
- **Password:** Defines the Service Administrator password.
- **baseDN:** Defines the Base DN.
- **Filter Usage:** Append to Default, Replace Default
- **Filter:** Used for filter configuration. Go to https://www.ldapexplorer.com/en/manual/109010000-ldap-filter-syntax.htm.
- **Encoding:** This is the character encoding to be used when importing from the LDAP filter

To check connectivity to the LDAP server, click the **Check LDAP connection** button.

4. Enter the following fields for LDAP User Attributes:
   - **Unique ID:** "objectGUID"
   - **First Name:** "givenName"
   - **LastName:** "sn"
   - **Extension:** "telephoneNumber"
   - **Mobile:** "mobile"
   - **Department:** "department"
   - **Email:** "mail"
5. Enter the following fields for when you want to import contacts from the LDAP server:
   - Days
   - Start Time
6. Enter the following fields for VocaNOM Connection:
   - Incremental mode:
     - When Incremental mode is enabled, the LDAP sync disables all contacts NOT in the list.
     - When incremental mode is not enabled, the LDAP sync adds the contacts to the system (without disabling the contacts that do not appear in the updated list)
7. From the 'Email Notification' drop-down list, select one of the following to indicate when notification emails should be sent:
   - None
   - Success
   - Failure
   - All
8. Click **Save Changes**.
9. (Optional) Click **Import Now** to import contacts from the LDAP server immediately.

8 Sending a VocaNOM App Invitation

By using the Mobile App Invitation option, organization administrators can distribute the Mobile Application Invitation to end users in two ways:

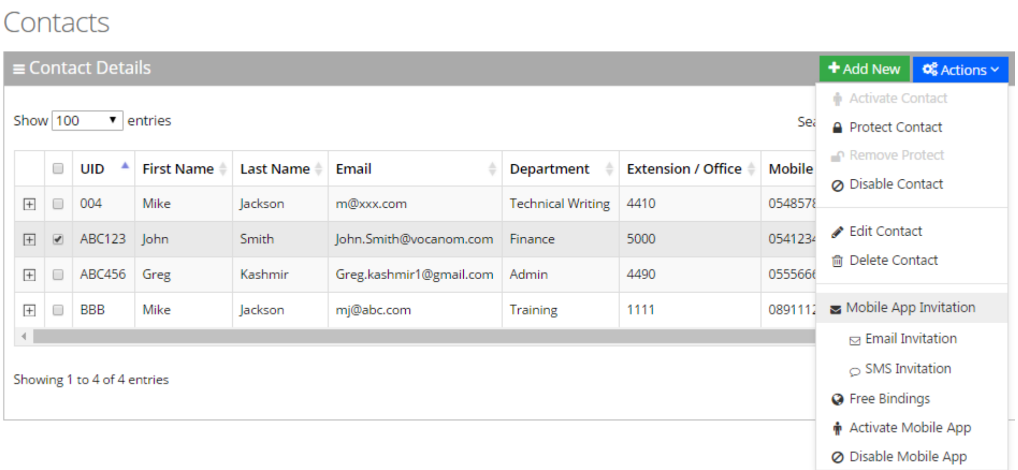
- Email
- SMS

The invitation includes a link to download the VocaNOM App and the credentials to be used.

➢ To send an VocaNOM App invitation:

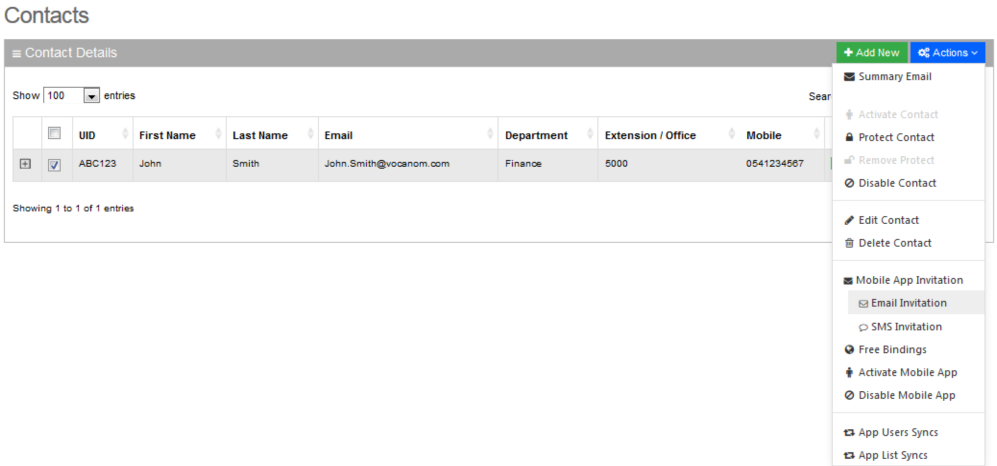
1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to send a Mobile App invitation to.
3. Confirm that the contact's status is 'Active'. If not, activate the contact before sending the VocaNOM App invitation.
4. From the ‘Actions’ drop-down list, select **Mobile App Invitation**; the following screen appears:

Figure 8-1: Mobile App Invitation



5. Select either **Email Invitation** or **SMS Invitation**.

Figure 8-2: Contacts Activation – Email Invitation



To send an invitation to a contact, ensure that the **Email** and **Mobile** fields in the Contact Details screen have been filled in.

6. A System Notification message is displayed informing you that the invitation was sent to the user.

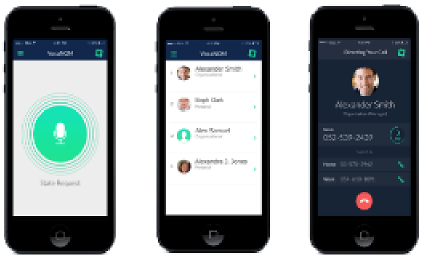
Downloading VocaNOM App from Email Invitation

The procedure below describes the steps to download the VocaNOM app from an email to your mobile device.

➢ To download VocaNOM app from an email invitation:

1. Open the 'Welcome to the VocaNOM app' email on your mobile device.
2. Click on the link as shown in the figure below, to download the app.

Figure 8-3: Downloading VocaNOM from Email



Welcome!

Your company is now connected to the VocaNOM mobile app, allowing you to easily communicate with any employee on the go.

With the VocaNOM app, you can dial, send emails, text or WhatsApp coworkers using your voice alone.

VocaNOM app download link: **http://app.vocanom.com/download**

Use the following login details in the welcome screen:

Username: John.Smith@Company.com
Password: **11111111**

Feel free to contact us for any additional questions and support requests at info@acvoca.com

3. You are directed to the App Store™ or Google Play™
4. Download the **VocaNOM** app.
5. When the download has successfully completed, open the VocaNOM app and enter the username and password assigned to you in Step 2 above.

Downloading VocaNOM App from SMS Invitation

The procedure below describes the steps to download the VocaNOM app from an SMS invitation to your mobile device.

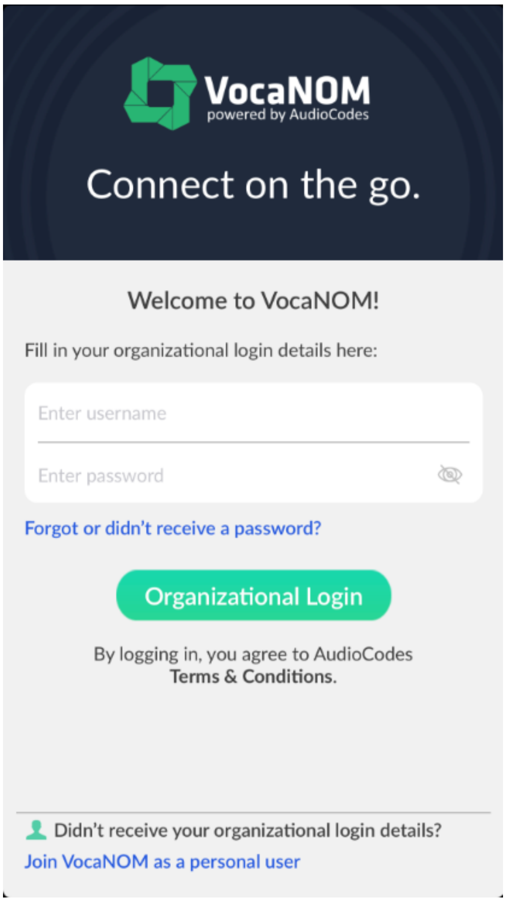
➢ **To download the VocaNOM app from an SMS invitation:**

1. Open the SMS on your mobile device; the following screen appears:

Figure 8-4: Downloading VocaNOM from SMS

2. Click https://app.vocanom.com/download link.
3. After downloading, open the VocaNOM app; the following screen appears on the mobile device:

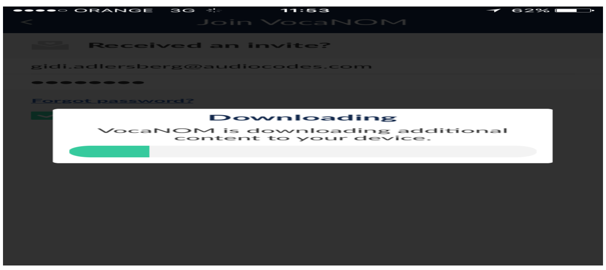
Figure 8-5: Welcome to VocaNOM



4. Enter the username and password you received in Step Open the SMS on your mobile device; the following screen appears: on page 162 above; and then tap Organizational Login.

5. The VocaNOM package downloads to your mobile device; the following screen appears:

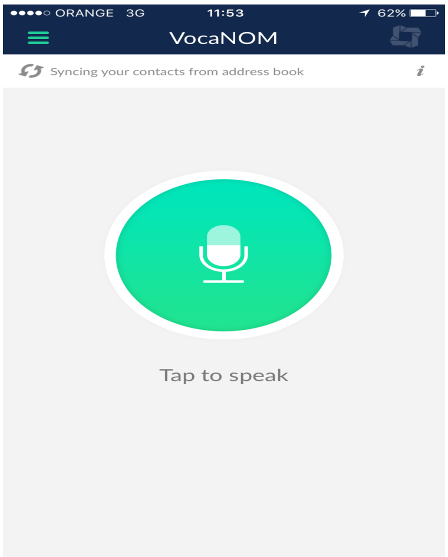
Figure 8-6: Downloading Additional Content



6. The VocaNOM app is now ready for use.

7. Tap the green circle on your screen and say the Contact's first and last name from your private or Enterprise Contact List.

Figure 8-7: Tap to Speak



8. From the Contact WhatsApp screen, you can also touch WhatsApp, SMS and the email address from your private or Enterprise Contact List.

Figure 8-8: Contact WhatsApp

9 Configuring Voca LDAP Synchronization

This section describes how to configure standalone Lightweight Directory Access Protocol (LDAP) synchronization for Voca Cloud installations.

LDAP Client Requirements

This section describes the system requirements for the Voca LDAP Client.

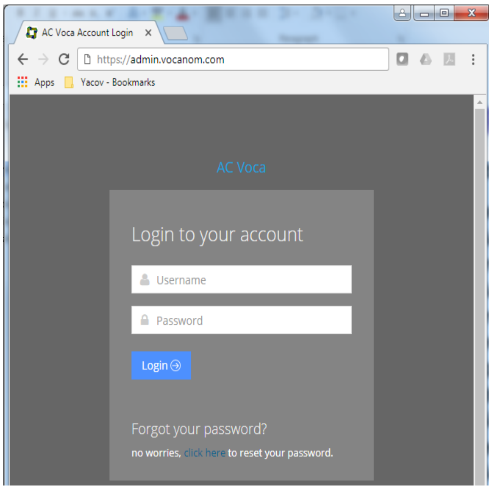
Hardware and Operating System Requirements

- **Voca Cloud mode:** The client is running on a customer-provided server with the Windows operating system.

Network Requirements

- The customer LDAP server should be reachable by network for Voca LDAP Client
- The Voca Cloud server should be reachable by the network for the Voca LDAP Client.
- Confirm that you can access the following link: https://admin.vocanom.com

Figure 9-1: Login to your Account



LDAP Synchronization Requirements

Customers need to provide the following information:

- LDAP server address or FQDN name
- LDAP Base Distinguished Name (DN)
- LDAP user with *"Password never expired"* enabled settings

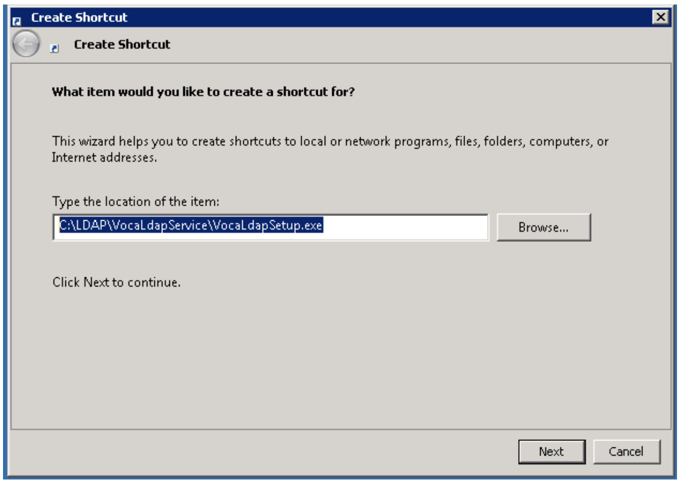
Running the LDAP Client Setup in Voca Cloud

The procedure below describes how you can run the LDAP client in Voca Cloud .

➢ To run the LDAP client in Voca Cloud mode

1. Create the **C:\LDAP\VocaLdapService** directory.
2. Copy the LDAP client files to this directory.
3. Create shortcut on the Desktop by doing the following:
   a. Right-click **Desktop** > **New** > **Shortcut**.
   b. Browse to **C:\LDAP\VocaLdapService\VocaLdapSetup.exe**.
   c. Click **Next**, and then click **Finish.**

Figure 9-2: Create Shortcut



Configuring the LDAP Client

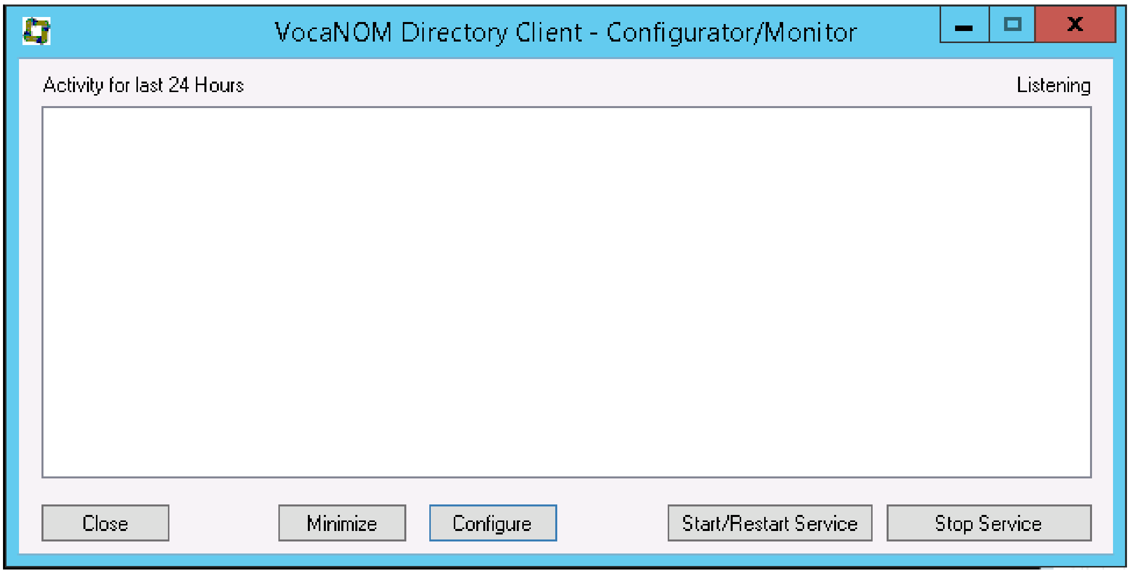
The procedure below describes how to configure the LDAP client.

Setting up LDAP Client Synchronization

➢ To run the LDAP Client Synchronization Setup

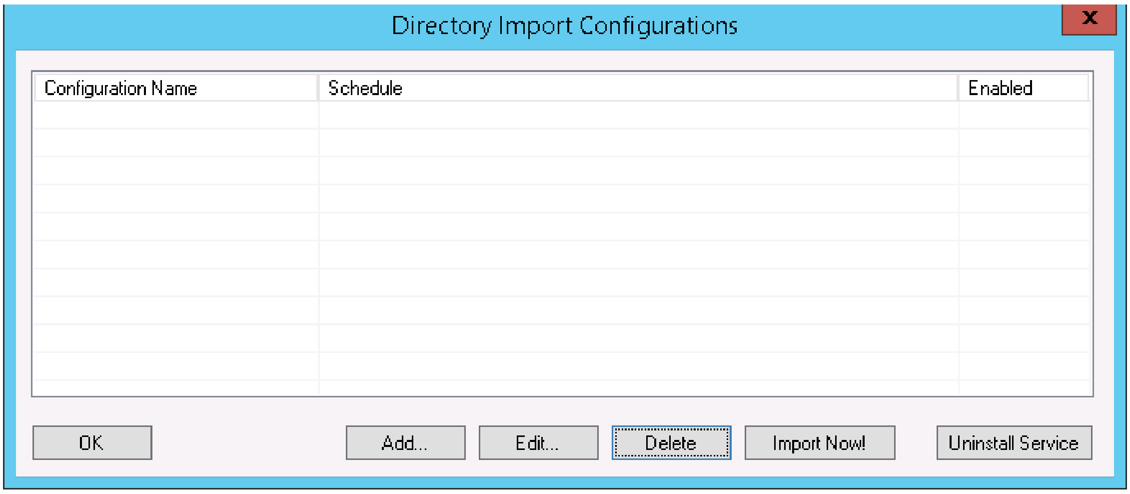
1. On the Configurator/Monitor screen, click **Configure**.

Figure 9-3: Configurator/Monitor



The following screen appears.

Figure 9-4: Directory Import Configuration



2. Click **Add.**
3. Select the 'Enable' check box.
4. In the 'Configuration Name' field, enter the appropriate name.

Entering Fields under LDAP Connection Tab

Enter the following fields under the LDAP Connection tab:

Server:	Defines the LDAP server IP address or FQDN name.
User:	Defines the LDAP user name.
Password:	Defines the LDAP user password.

Ask the customer to enable the 'Password never expires' property for the LDAP user in the Active Directory.

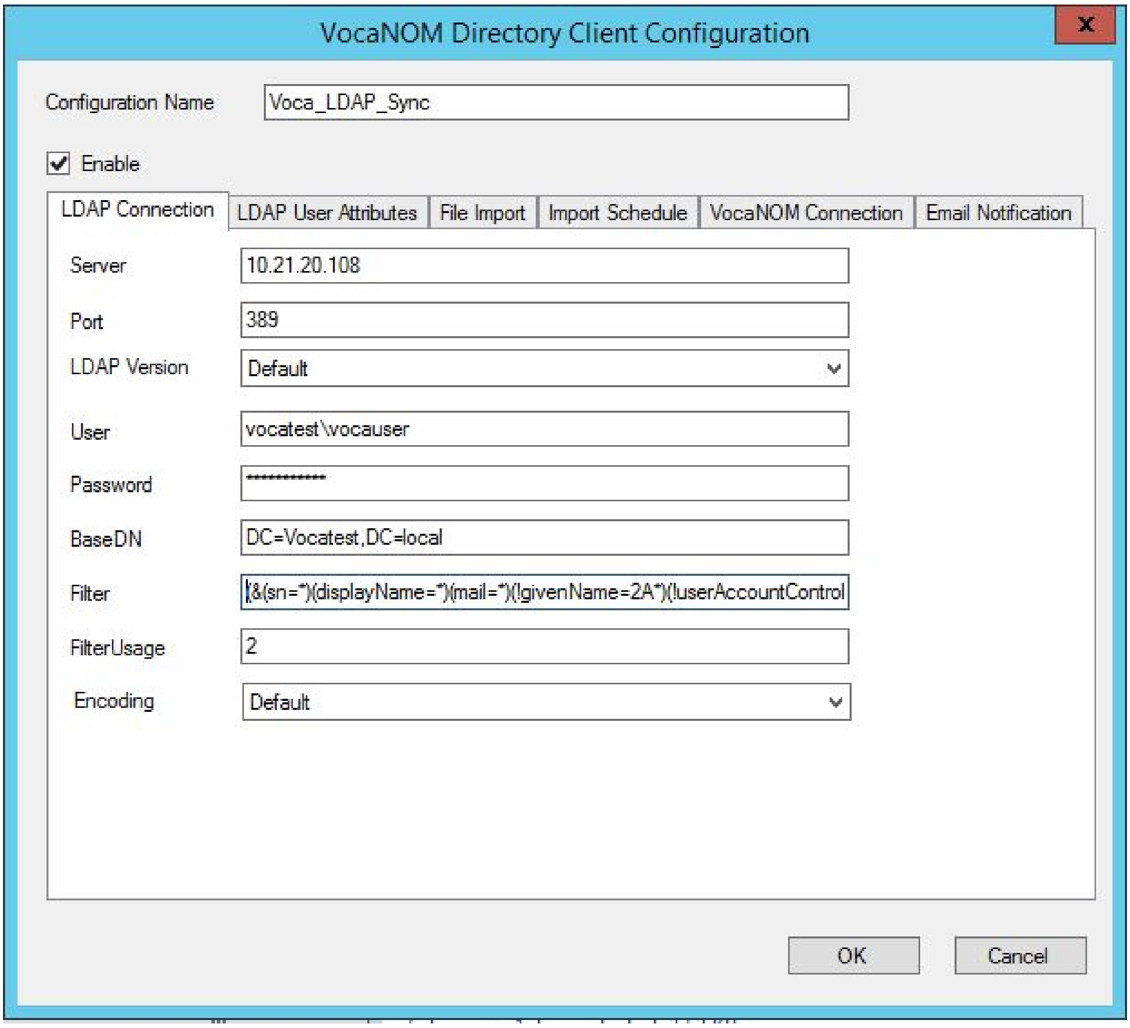
BaseDN: Defines the Base DN

Filter: See Useful Topics regarding filter configuration

FilterUsage: "2"

Encoding: Default

Figure 9-5: Directory Client Configuration



If you are using a secure LDAP connection, use **Port 636** instead of the non-secure **Port 389** (default).

Entering Fields under LDAP User Attributes Tab

Enter the following fields under the LDAP User Attributes tab:

UniqueID: "objectGUID"

FirstName: "givenName"

LastName: "sn"

Extension: "telephoneNumber"

Mobile: "mobile"

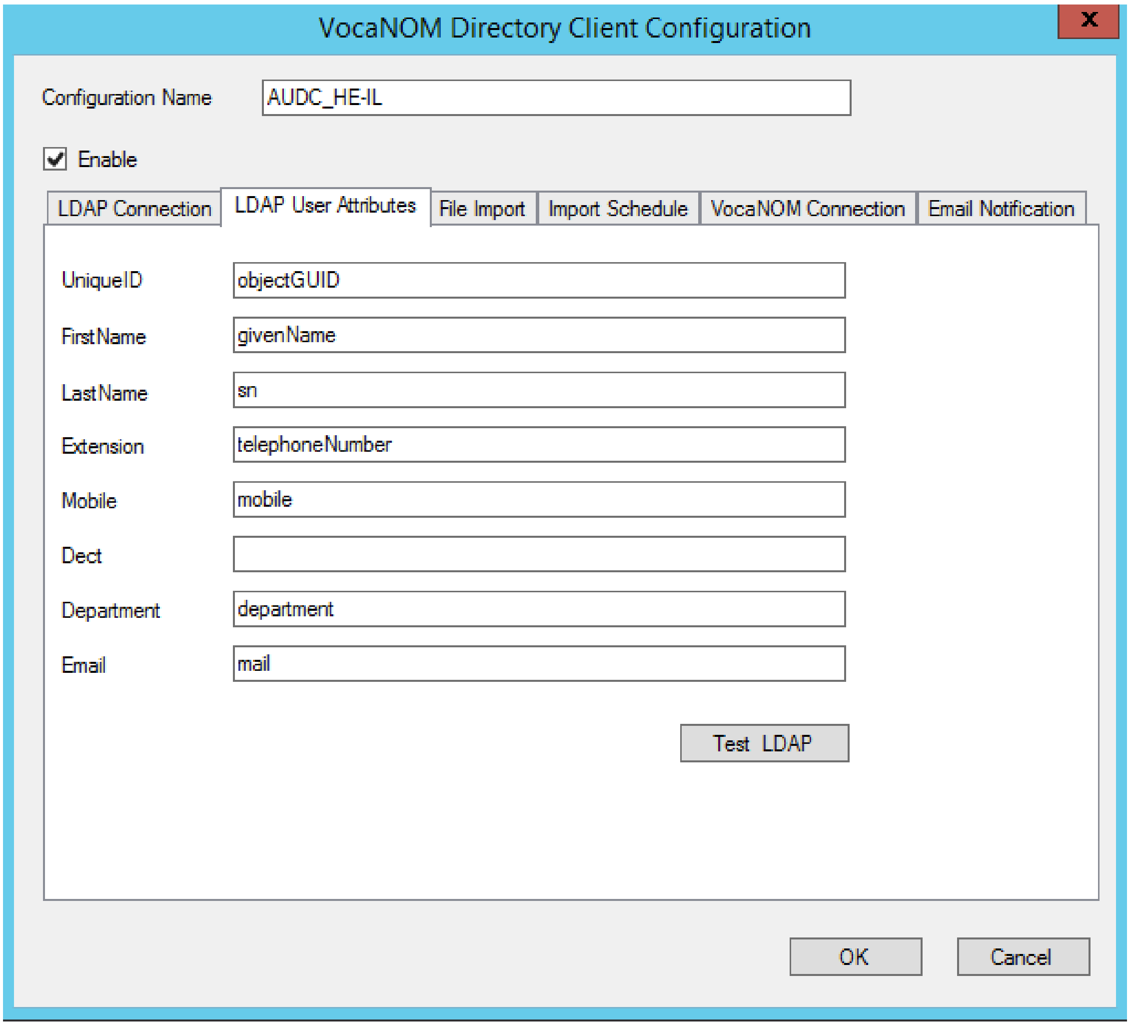
Dect: If your organization is using a DECT or WLAN phone, then assign the LDAP field of this phone type.

The DECT or WLAN phone should be enabled on the Voca system.

Department: "department"

Email: "mail"

Figure 9-6: Directory Client Configuration

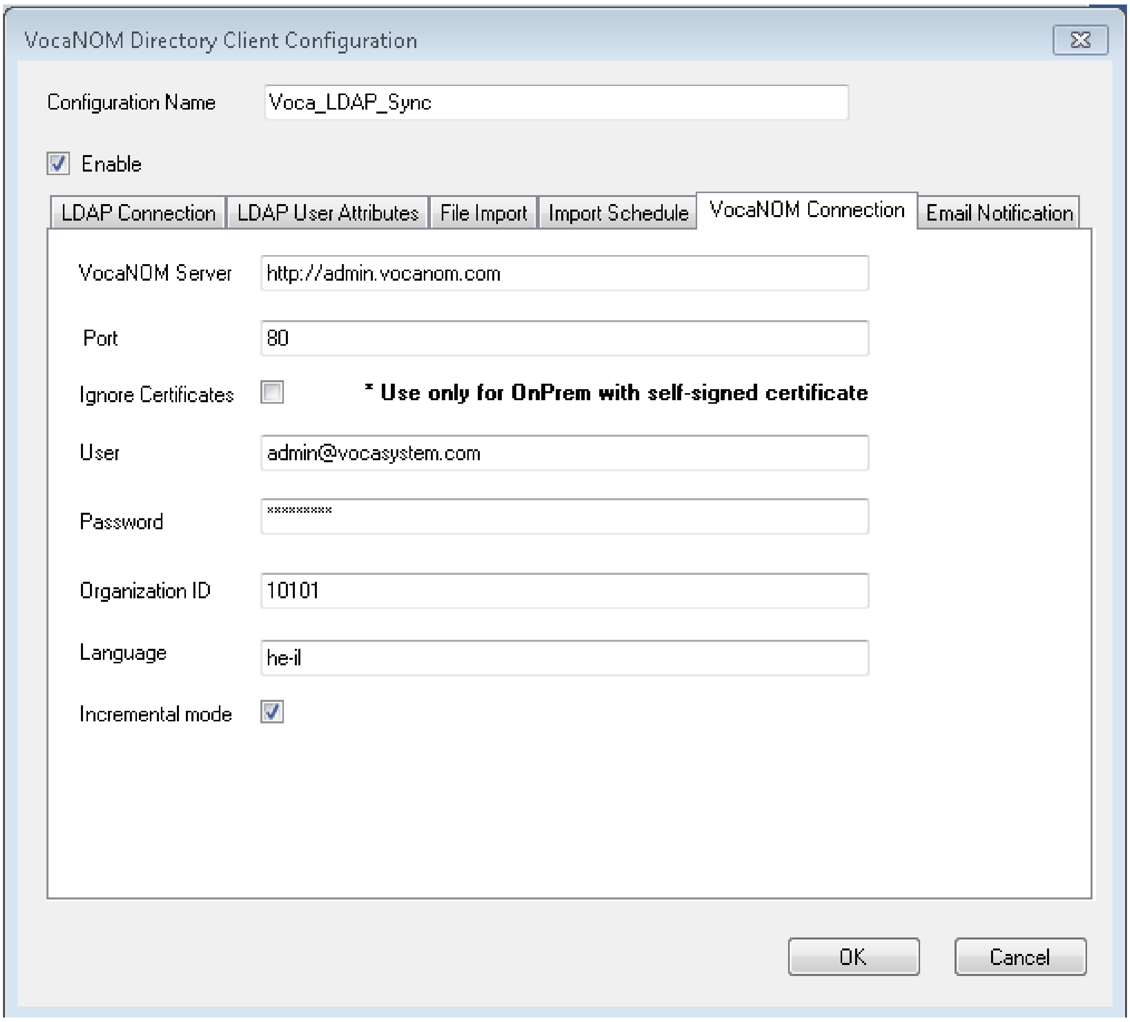


Entering Fields Under VocaNOM Connection Tab

1. Enter the following fields under the **VocaNOM Connection** tab:
   - **VocaNOM server:** Defines the URL of the VocaNOM server. It can include either FQDN or an IP address.
   - **Port:** Defines the port of the URL – either '80' for HTTP or '443' for HTTPS.

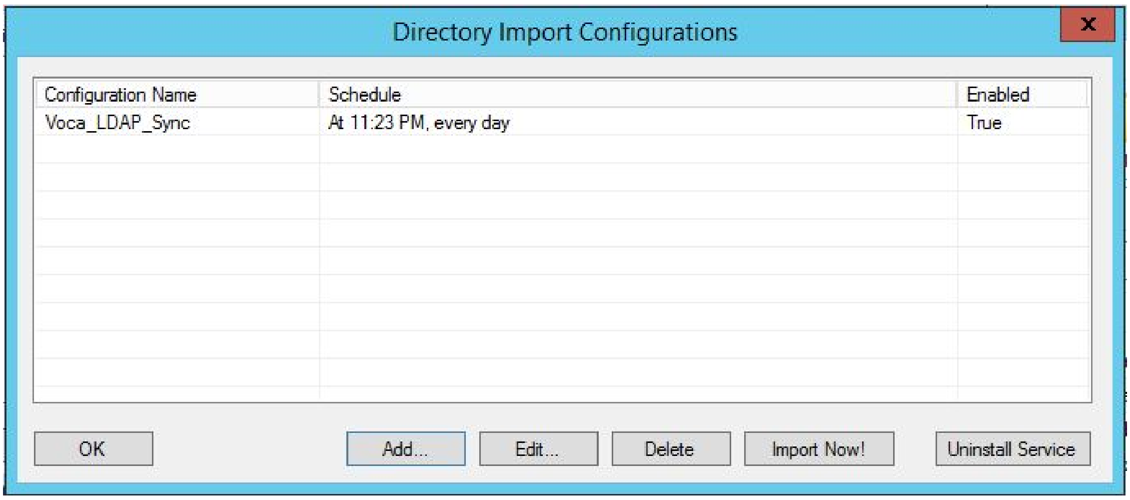
- **Ignore Certificates:** Defines whether to ignore the VocaNOM server's certificate in case of HTTPS. This option should be checked only if the VocaNOM server is installed On premises and the server certificate is self-signed.
- **User:** Defines the Service Administrator Name
- **Password:** Defines the Service Administrator Password
- **Organization ID:** Defines the Service ID (ask your system integrator for the System ID)
- **Language:** Defines the service dialect
- **Incremental mode:**
    - When **Incremental mode** is enabled, the LDAP sync disables all contacts NOT in the list.
    - When **incremental mode** is not enabled, the LDAP sync adds the contacts to the system (without disabling the contacts that do not appear in the updated list).

Figure 9-7: VocaNOM Connection



2. Click **OK**; the following screen appears:

Figure 9-8: Directory Import Configurations



3. Click **OK**.
4. Click **Close**.

Configuring Files in LDAP Client On-premises Mode

The following files need to be configured only in On-premises mode:

- Hosts file
- LDAP Client file

Testing LDAP Client Connectivity

The procedure below describes how to test LDAP connectivity

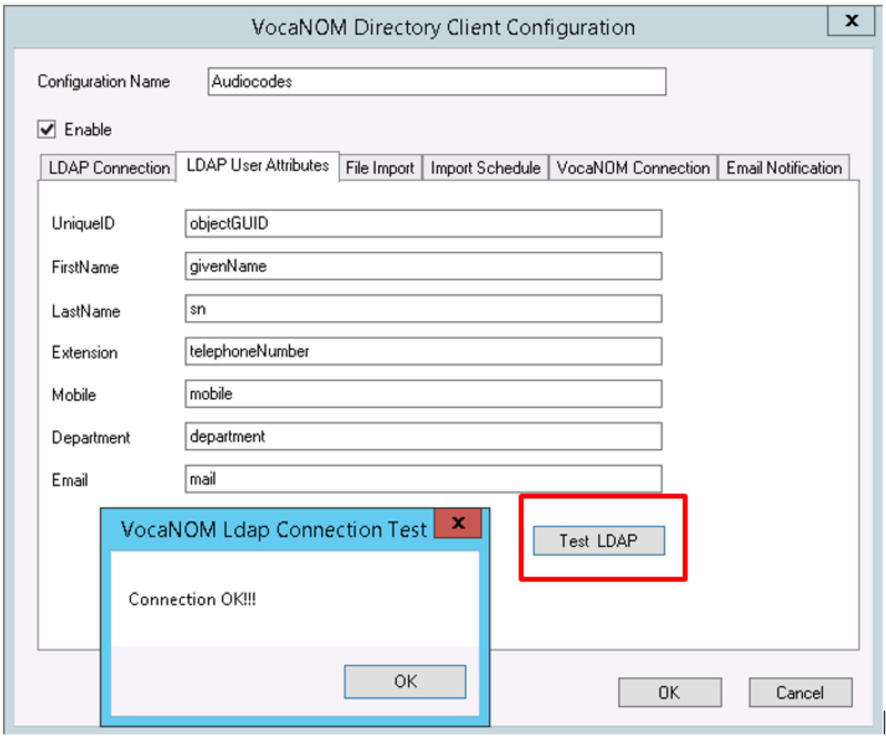
LDAP Server Connectivity Testing

The procedure below describes how to test the LDAP server connection.

➢ **To test the LDAP server connection:**

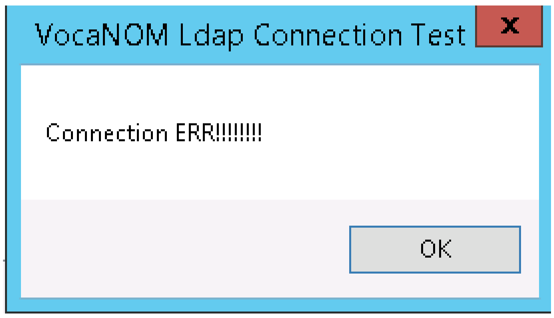
1. On the VocaNOM Directory Client Configuration screen, select the **LDAP User Attributes** tab.
2. Click **Test LDAP**.
   - If the **Connection OK!!!** dialog box appears, then the LDAP server is reachable by the network.

Figure 9-9: Test LDAP



- If the **Connection ERR!!!** dialog box appears, see Troubleshooting Customer's LDAP Server on the next page.

Figure 9-10: Connection ERR!!!



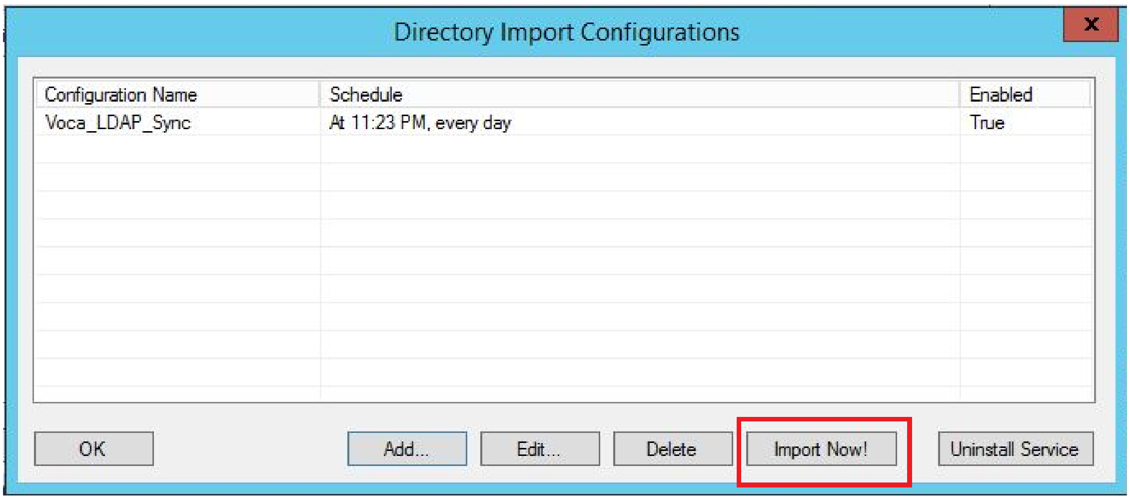
VocaNOM Server Connectivity Testing

The procedure below describes how to test the VocaNOM server connection.

➢ **To test the VocaNOM server connection:**

1. On the **Directory Import Configurations** screen, click **Import Now**.

Figure 9-11: Import Now



2. Confirm that contacts have been successfully created in the VocaNOM system.

3. If the VocaNOM Cloud system is not synchronized with the customer's LDAP and some errors appear in the *C:\LDAP\VocaLdapService\logs* log file, see LDAP Client Does not Connect to the VocaNOM Server on page 176.

Troubleshooting LDAP Client Connectivity

The procedure below describes how to troubleshoot LDAP client connectivity.

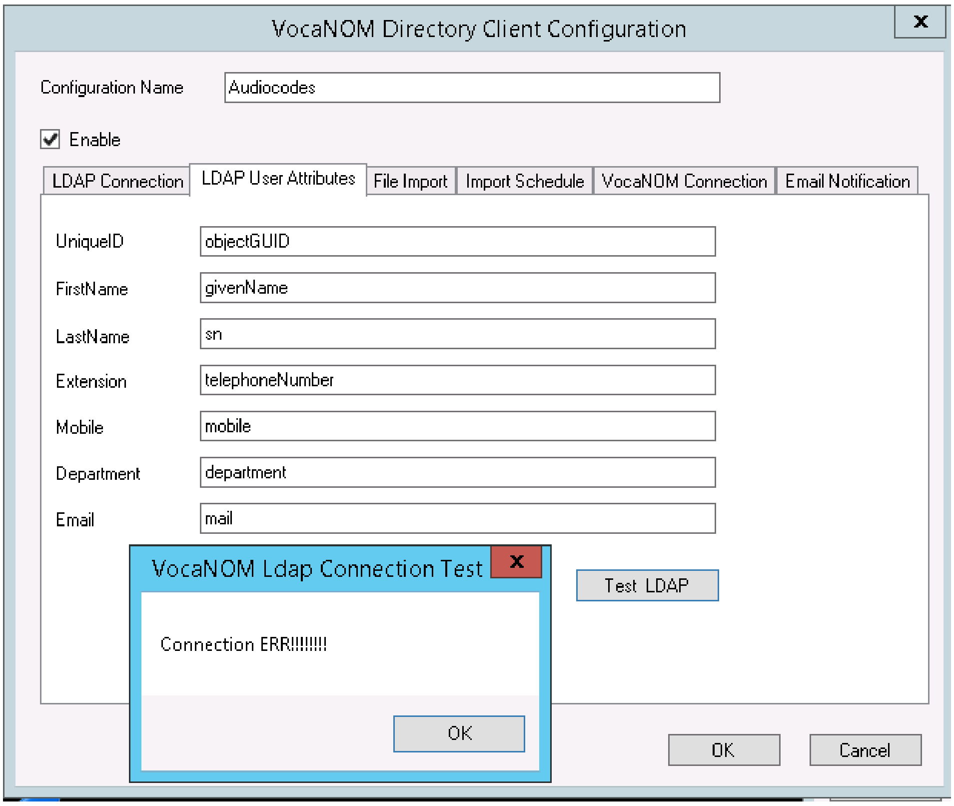
Troubleshooting Customer's LDAP Server

The procedure below describes how to troubleshoot the customer's LDAP server.

➢ **To troubleshoot the customer's LDAP server:**

1. If you click on **Test LDAP**, the "Connection ERR!!!" dialog box appears.

Figure 9-12: Connection ERR!!!



2. Check the *C:\LDAP\VocaLdapService\logs* log file. If an 'LDAP error' appears, then the LDAP server is not operational.

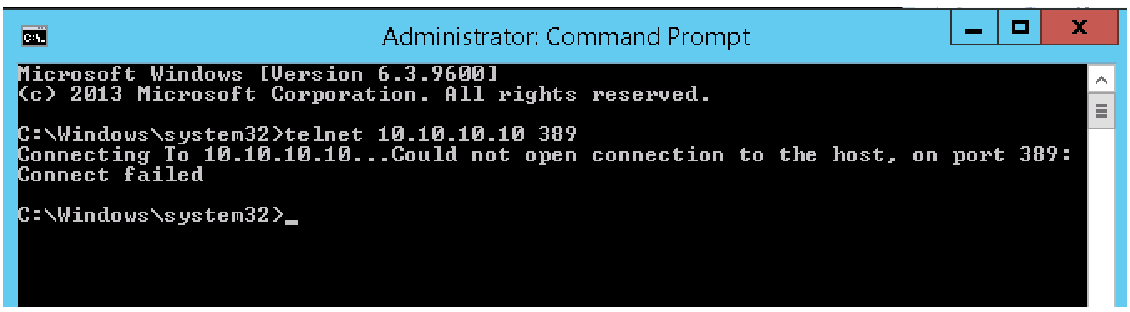
- You can also test the Telnet connectivity to the LDAP server by running the following command in the *Command Line* console*:*

```
telnet <LDAP server name or IP> 389
```

For example:

```
telnet ldap.audiocodes.com 389
telnet 10.10.10.10 389
```

Figure 9-13: Command Prompt



- If the LDAP server is not reachable by Telnet, check the network connectivity (firewall, routing and DNS).

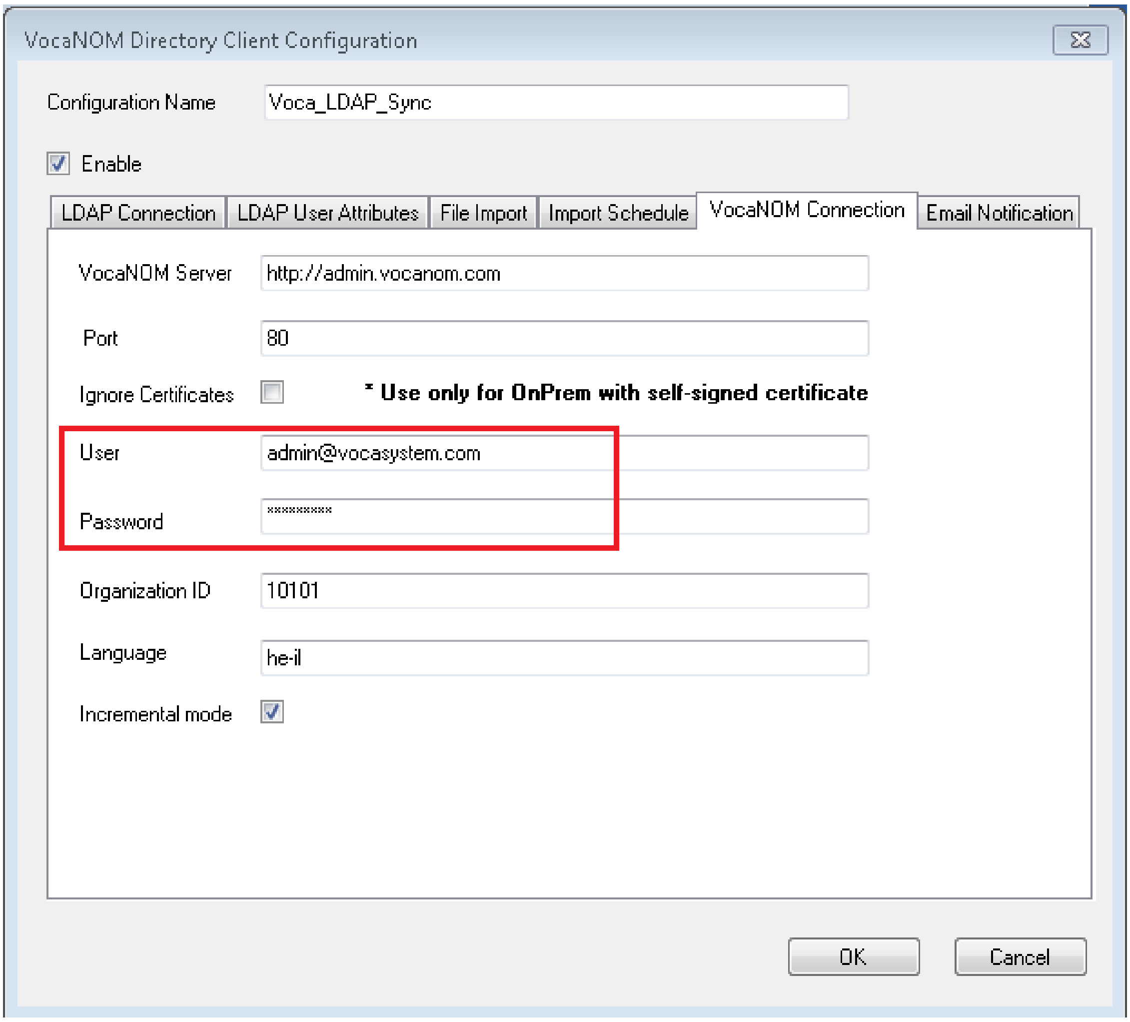
3. Check if the following error appears in the *C:\LDAP\VocaLdapService\logs* log file:

```
Error    LDAP error ......The user name or password
```

If so:

- Verify the customer user name and password of the LDAP user
- Re-enter them under the **LDAP Connection** tab, as shown in the figure below.

Figure 9-14: User/Password



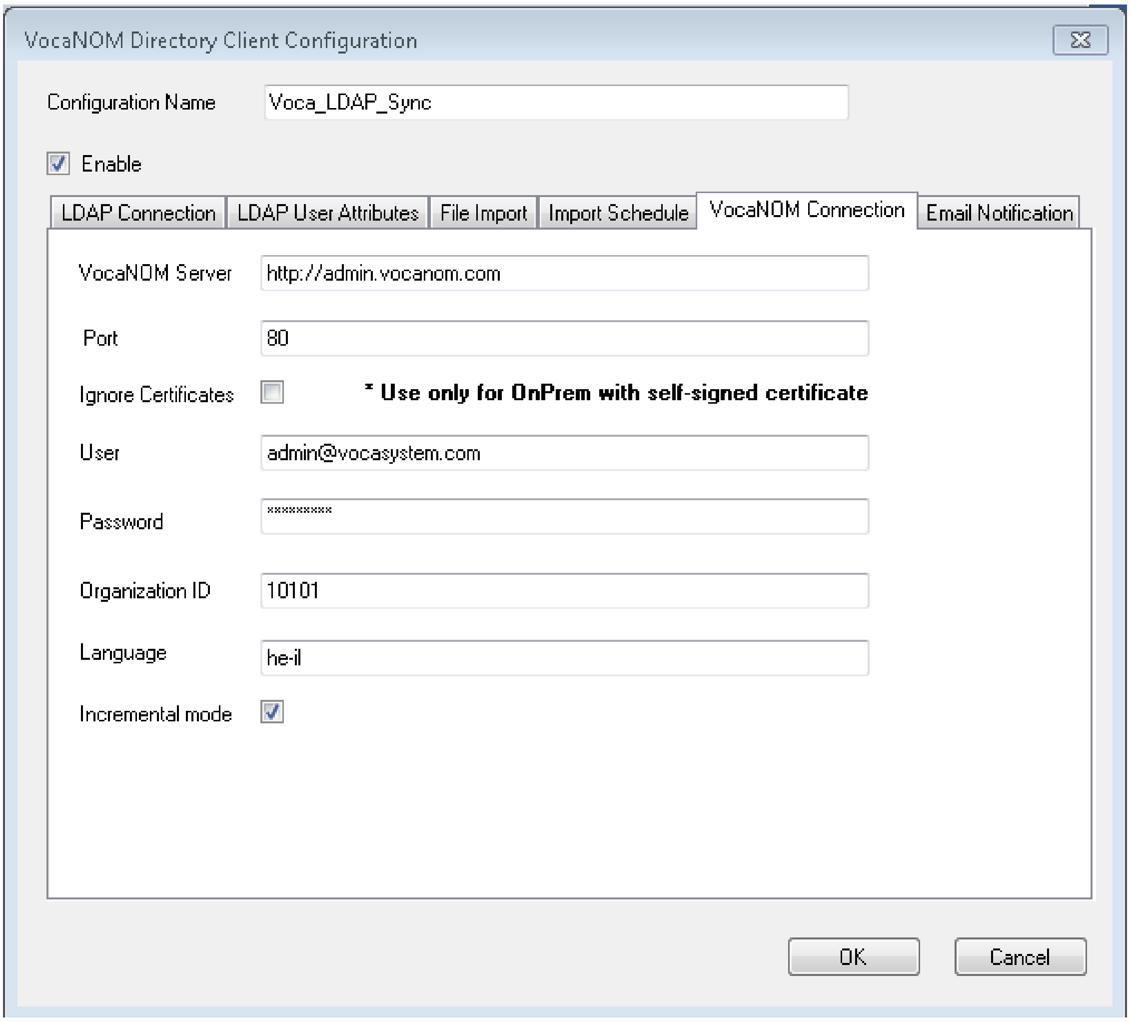
LDAP Client Does not Connect to the VocaNOM Server

Check if the following error appears in the *C:\LDAP\VocaLdapService\logs* log file.

```
Server was unable to process request. ---> Authentication error!!!
```

If so, check the User and Password under the **VocaNOM Connection** tab, and then re-enter these fields if necessary.

Figure 9-15: VocaNOM Connection



Error [Run] [LDAP import] edmws exception:Value Cannot be Null

Check if the following error appears.

```
Error [Run] [LDAP import] edmws exception:Value cannot be null
```

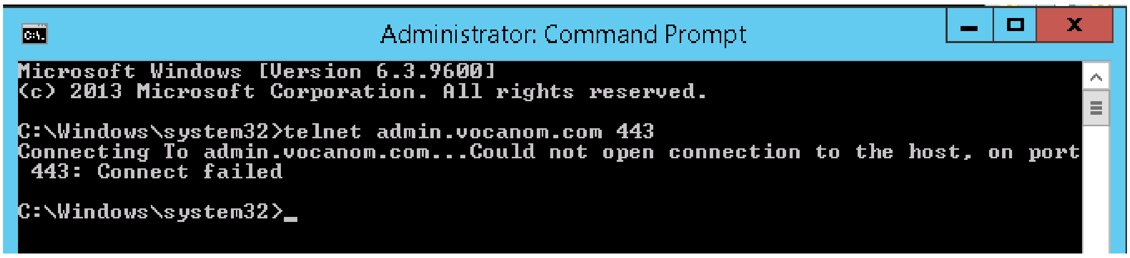
If so, check connectivity to the VocaNOM server.

For *LDAP Client Cloud* mode, check if the VocaNOM cloud server is reachable by network and do the following:

1. Run the following command in the Command Line console.

```
telnet admin.vocanom.com 443
```

Figure 9-16: Administrator Command Prompt



2. Check access using the following link: https://admin.vocanom.com.

3. If the VocaNOM server is not reachable by Telnet or by the provided link, ask the customer to check network connectivity (Firewall, Routing and DNS).

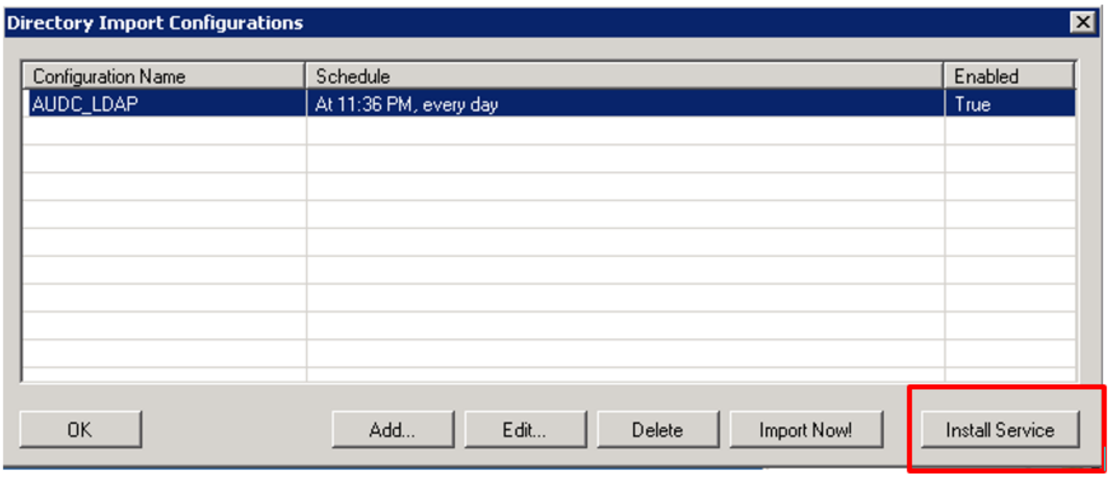
Installing LDAP Client Service

The procedure below describes how to install the LDAP client service to enable automatic synchronization procedures.

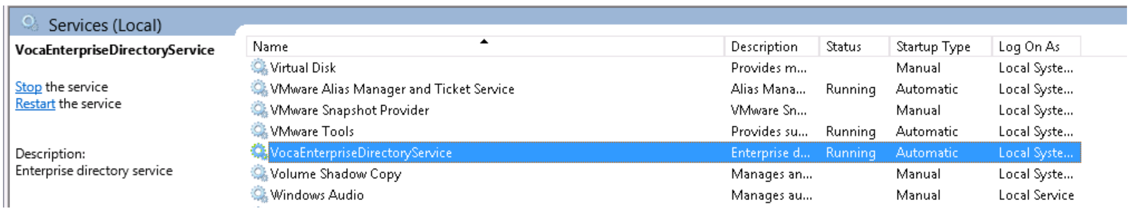
➢ To install the LDAP client service:

1. On the Directory Import Configurations screen, click **Install Service.**

Figure 9-17: Directory Import Configurations



The LDAP client service is installed.



2. By default, the VocaNOM LDAP service runs the synchronization procedure each day at 23:00.

10 Improving LDAP Synchronization

This appendix describes how to improve LDAP synchronization by using the following filters.

- Basic LDAP
- Advanced LDAP
- LDAP User Attributes

Basic LDAP Filters

- The following LDAP filter receives active (not disabled) contacts with first and last name and office or mobile phones.

```
(&(givenName=*)(sn=*)(!(|(userAccountControl=514)
(userAccountControl=546)))(|(telephoneNumber=*)(mobile=*)))
```

- The following filter is the same as the above, but receives only active contacts i.e., contacts without phones.

```
(&(givenName=*)(sn=*)(!(|(userAccountControl=514)
(userAccountControl=546))))
```

Advanced LDAP Filters

Sometimes, after LDAP synchronization, VocaNOM contains irrelevant contacts or objects. You need to understand the LDAP structure and improve the filter. VocaNOM contains the non-users contacts (printers, computers etc.).

Add the following user’s object to the filter:

- objectCategory=person
- objectClass=user

For example:

- Filter without phones:

```
(&(objectCategory=person)(objectClass=user)(givenName=*)(sn=*)(!(|
(userAccountControl=514)(userAccountControl=546))))
```

- Filter with phones:

```
(&(objectCategory=person)(objectClass=user)(givenName=*)(sn=*)(|
(telephoneNumber=*)(mobile=*))(!(|(userAccountControl=514)
(userAccountControl=546))))
```

VocaNOM contains the following contacts:

- Dismissed employees
- Employees who have resigned

These contacts are usually disabled by the System Administrator in the Active Directory.

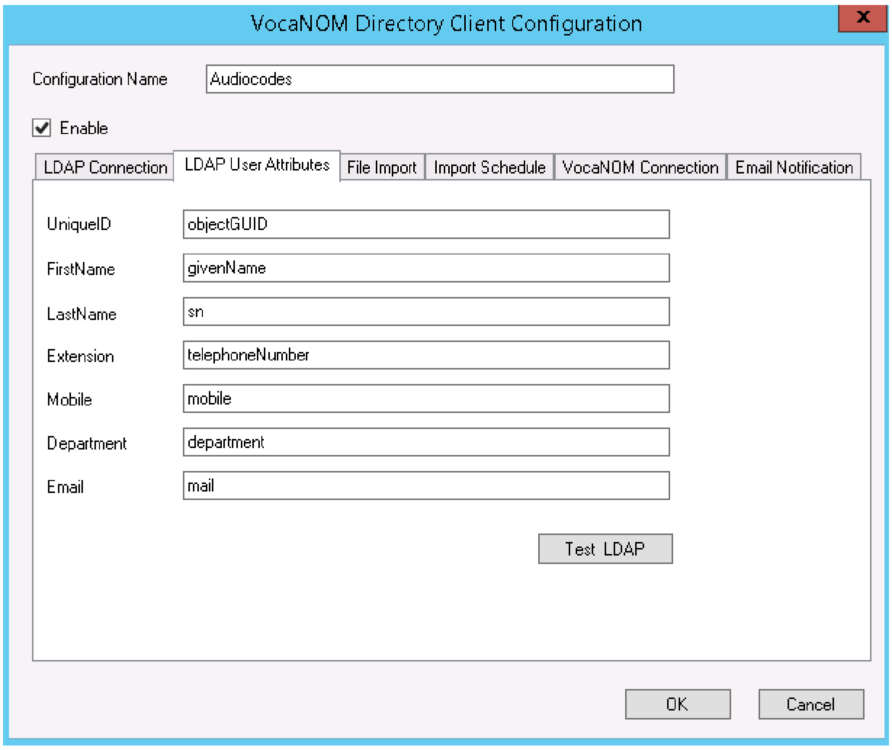
The filters provided by AudioCodes don't receive contacts with *userAccountControl=514* and *userAccountControl=546* (i.e., disabled contacts). Sometimes the disabled contacts have other *userAccountControl* values which need to be added to the filters.

For more information on how to use the UserAccountControl flags, refer to https://support.microsoft.com/en- us/help/305144/how- to- use- the- useraccountcontrol- flags-to-manipulate-user-account-pro.

LDAP User Attributes

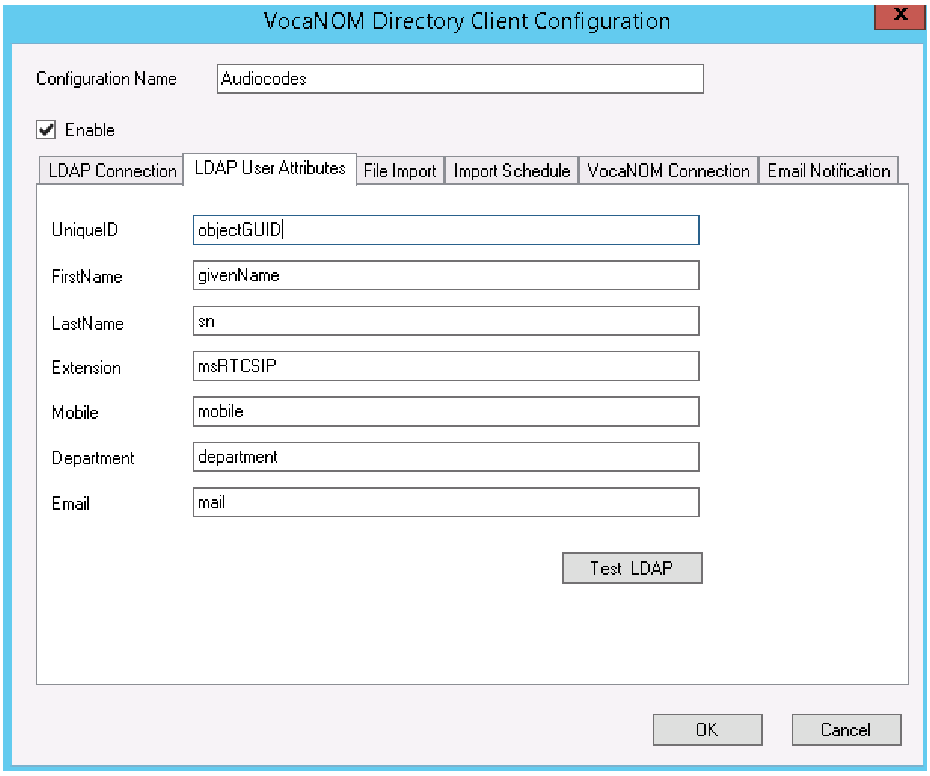
The Active Directory sometimes contains relevant information in another attribute, which needs to be changed on the VocaNOM LDAP Client. For example, the LDAP *telephoneNumber* attribute is empty, but the *msRTCSIP* attribute contains the phone number. See the default settings below:

Figure 10-1: Default Settings



The figure below displays how to change the attribute in the VocaNOM LDAP client.

Figure 10-2: LDAP User Attributes



11 Use Cases

The following use cases describe the steps involved in performing specific tasks.

Inviting a New Contact to VocaNOM App

This use case describes how to add and activate a new contact, and then send an invitation to that contact to download the VocaNOM app. To do this, perform the following:

1. Add a new contact - see Adding a Contact on page 10.
2. Activate the new contact - see Activating a Contact on page 19.
3. Invite (by email or text message) the user to download the VocaNOM app - see Importing/Exporting Contact List on page 23.
4. For more information, see Managing Contacts on page 10.

Adding a New Branch and Advanced Features

This use case describes how to add a new branch and how to configure the advanced features. To do this, perform the following:

1. Add a new branch - see Adding a Branch on page 67.
2. Map a city to a branch - see Mapping a City to a Branch on page 70.
3. Create an alias name for a branch - see Creating an Alias for a Branch on page 77.
4. Map unmapped cities to a branch - see Mapping Unmapped Cities to Branches on page 79.
5. Manage overlapping branches - see Managing Overlapping Branches on page 84.
6. For more information, see Managing Branches on page 67.

Configuring Flows, Voice Prompts and Menus

This use case describes how to configure flows, prompts and menus for Voca. To do this, perform the following:

1. Add a new voice prompt – see Adding a Voice Prompt on page 123.
2. Define period for voice menu – see Defining Working Hours on page 147.
3. Configure an IVR voice menu - see Configuring Menu Settings on page 129.
4. Create flows, set DNIS and menus - see Configuring Flow Settings on page 125.
5. Define dialed phone number manipulation rules (only if required) - see Managing Outgoing Rules on page 128.

For more information, see Configuration on page 123.

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