Administrator's Guide

AudioCodes Voice.AI Solutions

# Voca Conversational IVR

Version 9.1



Caudiocodes

# **Notice**

Information contained in this document is believed to be accurate and reliable at the time of printing. However, due to ongoing product improvements and revisions, AudioCodes cannot guarantee accuracy of printed material after the Date Published nor can it accept responsibility for errors or omissions. Updates to this document can be downloaded from https://www.audiocodes.com/library/technical-documents.

This document is subject to change without notice.

Date Published: January-18-2022

# **WEEE EU Directive**

Pursuant to the WEEE EU Directive, electronic and electrical waste must not be disposed of with unsorted waste. Please contact your local recycling authority for disposal of this product.

# **Customer Support**

Customer technical support and services are provided by AudioCodes or by an authorized AudioCodes Service Partner. For more information on how to buy technical support for AudioCodes products and for contact information, please visit our website at https://www.audiocodes.com/services-support/maintenance-and-support.

# **Documentation Feedback**

AudioCodes continually strives to produce high quality documentation. If you have any comments (suggestions or errors) regarding this document, please fill out the Documentation Feedback form on our website at <u>https://online.audiocodes.com/documentation-feedback</u>.

# Stay in the Loop with AudioCodes



# **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	1
	About this Guide	1
	Voca Benefits	1
	AudioCodes PBX Connectivity	1
2	Getting Started	3
	Logging in to Voca	3
	Changing User Interface Language of Voca	3
	Using Cloud	3
	Using On-premises	4
	Changing your Password	5
	Getting Familiar with the GUI	6
	Menu Options	6
		/
	Cetting Help	0
•		
3	Managing Contacts	. 10
	Contact Details Actions	10
	Adding a Contact	10
	Editing a Contact	. 12
		. 13
	Searching a Contact	17
	Protecting a Contact	. 17
	Removing Protection from a Contact	18
	Activating a Contact	. 19
	Disabling a Contact	20
	Activating a Contact to use the VocaNOM Mobile App	21
	Importing/Exporting Contact List	23
	Importing Contact Information	24
	Exporting Contact Information	26
	Freeing Bindings	27
4	Managing Contacts Departments	. 28
	Adding an Alias	28
	Editing an Alias	. 30
	Deleting an Alias	32
	Removing a Department Name from the Recognition List	34
	Setting the Primary Alias	34
	Using Prompts for an Alias	35
	Deleting a Department with No Contacts	36
	Importing a Package	37

	Importing Contacts Department	40
	Using the Dictionary List	41
	Adding Department Dictionary	41
	Editing Department Dictionary	42
	Deleting Department Dictionary	
	Adding a Department Manually	
	Disabling a Department	
	Activating a Department	
	Editing a Department	
	Setting Actions for a Department	
	Non-Working Hours Behavior for a Department	53
	Configuring Department Prompts	
	Creating an Alias for a Department	
	Aliases to Departments Mapping	
	Searching for an Alias	62
	Deleting a Department	62
	Searching a Department	63
	Importing/Exporting Department List	63
	Importing Department Information	63
	Exporting Department Information	
5	Managing Branches	
	Adding a Branch	
	Editing a Branch	
	Mapping a City to a Branch	70
	Configuring Branch Prompts	75
	Creating an Alias for a Branch	77
	Mapping Unmapped Cities to Branches	79
	Mapping Cities Automatically to a Branch	
	Mapping Cities Manually to Branches	
	Deleting a Branch	
	Managing Overlapping Branches	
	Importing/Exporting Branch List	
	Importing Branch Information	
	Exporting Branch Information	
6	Producing Reports	
	IVR Reports	89
	Overall Performance Report	
	Drill-down Report	
	Call Date Report	
	Call Hour Report	
	Requested Contacts Report	
	Requested Departments Report	
	Other Reports	

	Call Queue Reports	
	Overall Report	
	Drilldown Report	
	Branch Reports	110
	Branches by Date Report	110
	Field Chooser	111
	Requested Destination by Date Report	112
	App Reports	113
	Overall Performance Report	113
	Drill-down Report	115
	Action Date Report	118
	Action Hour Report	119
	Action Usage Report	
7	Configuration	123
	Adding a Voice Prompt	
	Configuring Flow Settings	
	Adding a Flow Setting	126
	Editing a Flow Setting	
	Deleting a Flow Setting	127
	Managing Outgoing Rules	
	Configuring Menu Settings	
	Adding DTMF and Speech Menus	129
	Adding a DTMF Menu	
	Adding a VocaNOM IVR Speech Menu	133
	Adding a VocaNOM Branch Speech Menu	143
	Editing Menu Settings	145
	Deleting Menu Settings	146
	Recompile Menus	147
	Defining Working Hours	147
	Adding Working Hour Set	147
	Editing Working Hour Set	149
	Deleting Working Hours Set	
	Defining Events and Holidays	
	Adding Events and Holidays	
	Editing Events and Holidays	
	Delete Events and Holidays	153
	Defining Additional Employees	
	Configuring System Settings	
	Defining Call Queues	
	Deleting Call Queues	157
	Configuring LDAP Settings	
8	Sending a VocaNOM App Invitation	
	Downloading VocaNOM App from Email Invitation	161

	Downloading VocaNOM App from SMS Invitation	
9	Configuring Voca LDAP Synchronization	
	LDAP Client Requirements	
	Hardware and Operating System Requirements	
	Network Requirements	
	LDAP Synchronization Requirements	
	Running the LDAP Client Setup in Voca Cloud	
	Configuring the LDAP Client	
	Setting up LDAP Client Synchronization	
	Entering Fields under LDAP Connection Tab	
	Entering Fields under LDAP User Attributes Tab	
	Entering Fields Under VocaNOM Connection Tab	
	Configuring Files in LDAP Client On-premises Mode	
	Testing LDAP Client Connectivity	
	LDAP Server Connectivity Testing	
	VocaNOM Server Connectivity Testing	
	Troubleshooting LDAP Client Connectivity	
	Troubleshooting Customer's LDAP Server	
	LDAP Client Does not Connect to the VocaNOM Server	
	Error [Run] [LDAP import] edmws exception:Value Cannot be Null	
	Installing LDAP Client Service	
10	Improving LDAP Synchronization	
	Basic LDAP Filters	
	Advanced LDAP Filters	
	LDAP User Attributes	
11	Use Cases	
	Inviting a New Contact to VocaNOM App	
	Adding a New Branch and Advanced Features	
	Configuring Flows, Voice Prompts and Menus	

# **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

പ്പ് SERVICE MOD	DE • Baruch-Doc.com					👙 English	Welcome Admin@Baruch-Doc.Com 🗸
Dashboard						<ul> <li>Hebrew</li> <li>English</li> <li>Spanish</li> </ul>	
<b></b>	Baruch-Doc Service Name	٩.	112233,33 Leading Number	≡	34 Contacts Usage	e German	Hebrew Active Dialect
Last 24 Hours						_	~

### **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 <a href="https://admin.acvoca.com">https://admin.acvoca.com</a>.

Figure 2-2: Login

vili VOCQ

# Log in to your account

Email	Username
Password	Password
	Log in

Enter the Username (previously sent to the customer email) and Password (that the customer defined) and click Log in; the customer Dashboard appears (see <u>Getting Familiar</u> 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

# vili VOCO

# Log in to your account

Email	Username
Password	Password
	Log in

### **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:



പ്പ് SERVICE MOI	DE • Baruch-Doc.com					🁙 English	Welcome Admin@Baruch-Doc.Com v
Dashboard							Change Password
<b>.</b>	Baruch-Doc Service Name	٩.	112233,33 Leading Number	≡	34 Contacts Usage	<b>Q</b>	Hebrew Active Dialect

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



- 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**







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









# **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:

ം SERVIC	E MODE • Baruch-Doc.	com			👙 English	Welcome Admin@	)Baruch-Doc.Com 🗸
Dashboar	rd					Change Password Log Out	
2	Baruch-Doc Service Name	٩.	112233,33 Leading Number	≡	34 Contacts Usage ⊚	<b>9</b>	Hebrew Active Dialect
Last 24 Hours	5						~
I Calls Summ	mary						

#### Figure 2-8: Dashboard with Log Out

2. Select Log Out.

# **Getting Help**

If necessary, contact <a href="mailto:support@acvoca.com">support@acvoca.com</a> 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

Contacts

≡C	E Contact Details + Add New 🗳 Actions 🗸											
Shov	Show 100 v entries Search											
		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	anot activated	
+		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	anot 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	
Ŧ		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active 🗈	
Show	Showing 1 to 6 of 6 entries											

2. Click Add New; the following screen appears:

#### Figure 3-2: New Contact

	1 Cor	itact Details			2 Confirm
For each contact plea	se enter their first and last n	ame, and at least one contact n	umber.		
Provide Conta	ict Details				
JID	First Name	Last Name	Department	Email	
Extension / Office	Mobile	DECT			

- 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

■ New Contact - Step 2 of 2							
1 ~ Co	ontact Details				2 Confirm		
Once the "Save Information" button is pressed, th In a minute you will be able to dial the provided in You will receive a summary mail with contact deta For any questions please feel free to contact vocat	Once the "Save information" button is pressed, the list of contact(s) above will be added to the system. In a minute you will be able to dial the provided number and say any of the names you entered. You will receive a summary mail with contact details to the DEMO System, we recommend forwarding this email to all those who will be using the demo. For any questions please feel free to contact vocademo@audiocodes.com.						
Contacts:	UID First Name	Last Name	Department	Email	Extension / Office	Mobile	DECT
	19 David	Moby	Finance	DM@dmoby.com	3600	0555555555	212121
	⊕ Back Save	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

Contacts										
≡ Co	≡ Contact Details + Add New ¢ Art								<b>O</b> Actions ~	
Show 100 V entries See						🛓 Import Co 🌲 Export Co	ontacts List ontacts List			
		UID 🔺	First Name 0	Last Name 🕴	Email 0	Department 0	Extension / Office	Mobile	Activate (	Contact
+		010	Jim	Barnes	JimB@gmail.com	Cardiovascular	1457	5455454	Protect C	ontact
+		020	Spiros	Salama	spal@mail.com	Obstetrics	2406	0254579	Disable C	Protect
+		1	David	Goldberg		Consumer Sales	1111			
+		2	Felix	Abram		Enterprise Sales	2222		Edit Cont Delete Cont	act
+		3	Jacob	Blackwell		Marketing	3333		9	active
+		4	John	Webber		Finance	4444			active
+		5	Mark	Tyson		Line 1	5555			active
+	אנג איז						active			
Showin	Showing 1 to 8 of 8 entries									

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

Figure 3-5:	Edit Contact Step 1
Edit Contact	
General Settings	
First Name*	Spiros
Last Name*	Salama
Department	Obstetrics
Email	spal@mail.com
Extension	2406
Mobile	02545799
DTMF Routing key	
Aliases	+ Save Changes

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.

Con	Ontacts							o <b>n</b> y updated!	
≡ Co	ntac	Details						+ Add New	Actions V
Show	Show 100 V entries Search								
		UID 🔺	First Name 🕴	Last Name 🕴	Email 0	Department 0	Extension / Office	Mobile 0	Status 0
+		010	Jim	Barnes	JimB@gmail.com	Cardiovascular	1457	545545455	active
+		020	Spiros	Salama	spal@mail.com	Obstetrics	2406	02545799	active
+		1	David	Goldberg		Consumer Sales	1111		active
+		2	Felix	Abram		Enterprise Sales	2222		active
+		3	Jacob	Blackwell		Marketing	3333		active
+		4	John	Webber		Finance	4444		active
+		5	Mark	Tyson		Line 1	5555		active
+		8888	ליאור	לובל		COBIO	4444		active
Showir	ig 1 to	8 of 8 entrie	15						< 1 →

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	
1 Cor	tact Details	2 Confirm
First Name*	David	
Last Name *	Moby	
Department	Finance	
Email	DM@dmoby.com	
Extension / Office	3600	
Mobile	0555555555	
DECT	212222	
Aliases for the client		
	× -	
+ More Aliases		
	Continue 🛞	

- 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

Edit Contact		
≡ Edit Contact - Step 1 of 2		
1 Con	act Details	2 Confirm
First Name *	David	
Last Name *	Мођу	
Department	Finance	
Email	DM@dmoby.com	
Extension / Office	3600	
Mobile	0555555555	
DECT	212222	
Aliases for the client		
Dave First Ni More Aliases Full Na	me me me	
	Continue ③	

7. The following screen appears.

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

≡ Edit Contact - Step 1 of 2		
1 c	ontact Details	2 Confirm
First Name *	David	
Last Name *	Moby	
Department	Finance	
Email	DM@dmoby.com	
Extension / Office	3600	
Mobile	0555555555	
DECT	212222	
Aliases for the client		
Dave First	Name V -	
+ More Aliases		
	Continue	

 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: Ac	lding a Contact Alias – More Aliases	
1	Contact Details	2 Confirm
First Name	* David	
Last Name	* Moby	
Departmer	t Finance	
Ema	il DM@dmoby.com	
Extension / Offic	e 3600	
Mobi	e 0555555555	
DEC	Т 212222	
Aliases for the client		
Dave Fi	rst Name V -	
Daveed Fi	st Name 🗸 🗕	
+ More Aliases		
	Continue	

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

≡ Edit Contact - Step 2 of 2					
1 ~ 0	ontact Details	2 Confirm			
Confirm Information					
General					
First Name:	David				
Last Name:	Moby				
Department:	Finance				
Email:	DM@dmoby.com				
Extension / Office:	3600				
Mobile:	055555555				
DECT:	212222				
Customer:	10097				
Aliases					
	Dave First Name Daveed First Name				
	Back 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

Co	ntac	ts							
≡C	ontac	t Details							+ Add New & Actions >
Sho	v 100	✓ entri	es					Sea	<ul> <li>Import Contacts List</li> <li>Export Contacts List</li> </ul>
		UID 🔺	First Name 🕴	Last Name 🕴	Email 🕴	Department 0	Extension / Office	Mobile	🛉 Activate Contact
+		010	Jim	Barnes	JimB@gmail.com	Cardiovascular	1457	5455454	Protect Contact
+		020	Spiros	Salama	spal@mail.com	Obstetrics	2406	0254579	Protect  Disable Contact
+		1	David	Goldberg		Consumer Sales	1111		
+		2	Felix	Abram		Enterprise Sales	2222		Edit Contact  Delete Contact
+		3	Jacob	Blackwell		Marketing	3333		active
+		4	John	Webber		Finance	4444		active

- 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:

												+ Add New 🛛 📽 Actio
												🛊 Activate Contact
ow	100	✓ entri	es								Se	Protect Contact
		UID 🔺	First Name 🛛 🕴	Last Name	\$ Email	Department	Extension / Office	Mobile	DECT 🕴	Status 🕴	App §	<ul> <li>Remove Protect</li> <li>Disable Contact</li> </ul>
E		004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	<b>e</b>	-
-		18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not not	Edit Contact
-		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	active	not	B Delete Contact
E		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	not not	Mobile App Invitatio
E		ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665358		active	act	Free Bindings     Activate Mobile Apr
E		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	📾 act	O Disable Mobile App
F		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	activ	•

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

Cor	ntac	ts										
≡C	ontad	t Details									+ Add New	<b>Q</b> Actions ~
Shov	100	∨ entri	es								Search:	
		UID 🔺	First Name	Last Name 🕴	Email 0	Department 0	Extension / Office	Mobile 0	DECT 🕴	Status 🕴	App Status	Last SMS 🛛 🕴
+		004	Mike	Jackson	т@ххх.com	Technical Writing	4410	05485787787		protected	active	
ŧ		18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
÷		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	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 2	
÷		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	active	
+		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	
Show	ing 1 t	o 7 of 7 entrie	es									< 1 →

#### Figure 3-14: Protected Contact

Showing 1 to 7 of 7 entries

### **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

Contacts

∎ Co	onta	ict Deta	ils								+ Add New 🗳 Actions
hov	/ 100	) ~ e	ntries							Se	<ul> <li>Activate Contact</li> <li>Protect Contact</li> </ul>
		UID 🔺	First Name 🕴	Last Name 🕴	Email 🕴	Department 🕴	Extension / Office 🕴	Mobile 🕴	DECT 🕴	Status 🔶	Remove Protect     Disable Contact
+		004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		protected	O Disable Contact
+		18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	Edit Contact
+		19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	Delete Contact
+		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	Mobile App Invitation
+		ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665358		active	<ul> <li>Free Bindings</li> <li>Activate Mobile App</li> </ul>
+		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	<ul> <li>Disable Mobile App</li> </ul>
+		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active
ow	ing 1	to 7 of 7 e	ntries								< 1

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

Figure 3-16:	Removed	Protected	Contact
--------------	---------	-----------	---------

Cor	itad	ts										
≡ Co	ntac	t Details									+ Add New	📽 Actions 🗸
Show	100	∨ entri	25								Search:	
		UID 🔺	First Name	Last Name 🛛 🕴	Email \$	Department 0	Extension / Office	Mobile 0	DECT 0	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	a not activated	
+		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	active	a not activated	
÷		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	a 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 active	
+		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	
Show	ng 1 t	o 7 of 7 entri	25									< 1 →

### **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	а	Contact
--------	-------	------------	---	---------

$\cap$	$\sim$	to	~	to	
C	Ο	ld	C	LS	

											🛉 Activate Contac	t
how	100	) × ei	ntries							Se	Protect Contact	
		UID 🔺	First Name 🕴	Last Name 🕴	Email 🔶	Department 🕴	Extension / Office 🕴	Mobile 🕴	DECT 🕴	Status 🕴	Remove Protect     Disable Contact	( F
+		004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	O DISASIC CONTACT	
+		18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	Edit Contact	
+		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	active	Delete Contact	
+		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	Mobile App Invi	tation
+										disabled	<ul> <li>Free Bindings</li> <li>Activate Mobile</li> </ul>	
+		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	<ul> <li>Ø Disable Mobile</li> </ul>	Арр
+		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	

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

COI	nta	icts										
											🕈 Add New	🕫 Actions 🗸
Show	v 10	) ~ e	ntries							Se	arch:	
		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	anot activated	
+		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	active	🖻 not activated	
+		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	anot activated	
+		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	mj@abc.com	Training	1111	089111222		active	active active	
Shov	ving 1	to 7 of 7 e	ntries								<	1 >

#### 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

#### Contacts

∎ Co	onta	ict Detai	ils								+ Add New 📽 Actions ~
Show	100	) ~ e	ntries							Se	<ul> <li>Activate Contact</li> <li>Protect Contact</li> </ul>
		UID 🔺	First Name 🕴	Last Name 🕴	Email 🔶	Department 🕴	Extension / Office	Mobile 🕴	DECT 🕴	Status 🕴	Remove Protect
+		004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	O Disable Contact
+		18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	Edit Contact
+		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	active	Delete Contact
+		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	Mobile App Invitation
+		ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665232232		active	<ul> <li>Free Bindings</li> <li>Activate Mobile App</li> </ul>
+		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	Oisable Mobile App
+		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active

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

$\sim$	~	1-	_	F-
	Ο	d	(	LS

		0.00								
≡C	onta	ict Detai	ils							
Show	v 100	0 V ei	ntries							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			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 3-2	1: Activa	te Contac	t – M	obile A	\pp
------------	-----------	-----------	-------	---------	-----

-					
ſ.,	$\cap$	n		$\sim$	-C
	U	1.12	La		

≡ C	onta	ict Detai	ls								+ Add New <b>\$</b> Actions >			
Shov	/ 100	)	ntries							Se	Activate Contact  Protect Contact  Remove Protect			
Ŧ		004	First Name 🛛	Last Name 👳	Email 👳	Department	Extension / Office	Mobile =	DECT	Status 🔻	Ø Disable Contact			
÷		18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	Edit Contact			
+		19	David	Moby	DM@dmoby.com	Finance	3600	0555555555	212222	active	Delete Contact			
+		987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	Mobile App Invitation			
÷		ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665232232		active	<ul> <li>Free Bindings</li> <li>Activate Mobile App</li> </ul>			
+		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	055566666666		active	📾 Enterprise			
+		BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	Private			
											■ Enterprise & Private			
Show	ing 1	to 7 of 7 e	ntries		wing 1 to 7 of 7 entries									

- 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.

or	nta	cts								V User	John Smith@visca eted successfully	NORLCOTT IN
6	mu	ct Deta	ls.								+ Add New	<b>of</b> Actions
		Ann Artis	stian Prantsus									
-	10	e	ntries							Se	with	
	0	uo *	First Name	Last Name 1	trail 1	Department 0	Extension / Office	Mobile 1	DECT	Status I	App Status	Last SMS
8	0	004	Mile	Jackson	m@us.com	Technical Webrig	4410	05485787787		-	and a	
Ξ	0	18	Beb	Martin	bm@finance.com	Finance	3242	00299087766	103406	100		
2		19	Devid	Mohy	DM@dmoky.com	Finance	3600	0505305355	212222	100		
-							1000			-	-	
8		967	6+5	jana	abcDgmail.com	Finance	*999	2012342618		1000	-100 activated	
8	0	987 ABC123	jahn	Smith	abc@gmail.com John.Snich@vocanom.com	France	5000	0545665232232				
8		987 ABC123 ABC456	Bob John Greg	jane Smith Kashmir	abc@gmail.com john.Smith@vocanom.com Greg.kashmi1@gmail.com	France Admin	3000 4490	0545965232232 0555966666666				

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
--------------	----------	---------	-------	-----------	------

											+ Add New	📽 Actions 🗸
hov	v 100	) ~ e	ntries							S	earch:	
		UID 🔺	First Name 🍦	Last Name 🍦	Email 🕴	Department 🕴	Extension / Office 🍦	Mobile 0	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	0555555555	212222	active	anot activated	
+		987	Bob	jane		Finance	4999	5012345678		active	9 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	0 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
--------	-------	---------	---------

ashboard	= Co	ntaci	Details							+ Add New Of Arts
	Show	100	entries							Import Contacts Lis  Se:  Export Contacts Lis
enartments		0	UID 🔺	First Name 0	Last Name 0	Email 0	Department 0	Extension / Office	0 Mobile	Activate Contact
anchas	+	0	1	ruslan222	koren	test@voca.com	marketing	0543080340	0523741571	Protect Contact
	+	0	20003	Mari	zverev	jasdgash@zhjasd.com			546765239	Remove Protect
eports	÷		20004	Chana	Zveda				546765238	Ø Disable Contact
onfiguration	÷	8	20006	Riki	Zurdaker					/ Edit Contact
	÷	•	20008	Rochama	Zur					B Delete Contact
	+	8	20009	David	Zur					active
	+	8	20010	Zahava	Zur					active
	+	0	20011	Lion	Zukerman					active
	+	0	20012	Yosef	Zugrabo					active
	+	0	20013	Shulamit	Zubery				546765237	active
	+	8	20014	Jøk.	Zuabi					active
	+		20015	Yhodit	Zuabi					active



Import/Export	
🕫 Import Contacts List	🛛 Export Contacts List
Incremental Mode Encoding: UTF-8      Choose File No file chosen Import CSV 46  This feature allows you to synchronite your contacts with the system, as it makes it easier to update a large number of contacts from a CSV file into the system. Use an empty CSV template file as a starting point for a new import operation. Get CSV Template File Note: The CSV file must be Tab delimitered and saved in UTF-8 encoded format.	Export Active Contacts List     Export Active Contacts List     Export Inactive Contacts List     Export CSV in     The file will be exported in CSV format.

### **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
--------	-------	--------	----------	------

📥 Import Contacts List	×
Import your contacts list from <b>CSV</b> or <b>Excel</b> files Incremental Mode Overwrite empty contacts aliases Encoding: UTF-8 Choose File No file chosen	
The best starting point Use an empty template Get csv template   Get excel template Both files must be save in UTF-8 encoded format.	

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.

Cancel

Import Contacts List

- **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

Pre-Import Report

≡ Pre-Import Details		
Notice: The system is currently pending for action		
Status	Records	Preview
New Entity	52	۲
Items that will be enabled (Already Exist)	0	
Update	0	
No Change	0	
Items to be disabled	0	
✓ Confirm Import X Cancel Import		

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 <b>3-28</b> :	Update	<b>Pre-Import</b>	Report
----------------------	--------	-------------------	--------

Pre-Import Report								
≡ Pre-Import Details								
Notice: The system is currently w	alting for action							
Status							Records	Preview
Items that will be enabled (Already	Evicth						0	
Update							2	۲
No Change							12645	۲
Items to be disabled							0	
≡ Update								×
Show 25 • entries							Search:	
First Name 🔺	Last Name 🕴	Department	¢ Extension / G	Office 0	Mobile 0	Emai	I	\$
Jörn	Schmaljohann	A	1111	05	53741571	jschmaljohann@ukaachen.de		
Jörn	Schmaljohann	A	1111	22	222	jschmaljohann@ukaachen.de		
Marlies	Dorloechter	A	1111	05	523741571	Marlies.Dorloechter@dir.de		
Marlies	Dorloechter	A	1111	22	222	Marlies.Dorloechter@dlr.de		
Showing 1 to 4 of 4 entries							<	1 >
🗸 Confit	m Import X Cancel Import							

The same behavior applies for Contacts that have been disabled.

 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

Contacts = Contact Details Note: You haven't completed your previous task. To continue operating with the system, please click here to complete your task

- 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

🔹 Export Contacts List	×
<ul> <li>Please choose</li> <li>Export Active and Inactive Contacts List</li> <li>Export Active Contacts List</li> <li>Export Inactive Contacts List</li> <li>Export your contacts list in CSV or Excel files</li> </ul>	
Cancel	Export Contacts List (CSV, Excel)

- 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".



customer type			
	VocaNOM Mobile App		
	Enterprise		
	Private		
	Allow asp		
	Medical DE-DE		
	Medical HE-IL		
	VocaNOM Branch IVR		
Phone Types	None		•
Max. Contacts	1000		•
Country	Gormany (40)		× ×
Country	Germany (45)		
System Dialect	German		Ŧ
Auto Attendant Name Recognition Order for	First name – Last name		Ŧ
Enterprise Contacts	First name – Last name		
<b>T</b>	(First name – Last name) and (La	ast name – First name)	
Timezone*	First name and (First name – La	st name)	
	First and (First – Last) and (Last	- First)	
Hide CLI	Last name – Department name		
	(Last name – Department name	) and (First name – Last name – [	Department name)
Allow External CDR Reports	(Last name – Department name	) and (Department name – Last r	name)
	(Last name – Department name	) and (Department name – Last r	name) and (First name – Last name – Department name)
Concurrent channel licenses*	20		
	Available licenses: 1531		
	realization incension 1991		

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

#### Contacts Departments

≡ Contact	ts Departments			
1. Selec	tt ASP HE-IL V Save			
2. Depa	artments			
Show 25	✓ entries Search:	Delete	unused dep	bartments
± Aliases	Department Name	\$	Prompt	Actions
+	cardiovascular		-0	
÷	consumer sales		40	
+	enterprise sales		-0	
+	finance		40	
±	line 1		4))	
Ŧ	management		-()	Û
+	marketing		40	
+	obstetrics		-	
Showing 1 to	8 of 8 entries		<	1 >

- 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

Contac	ts Departments	5							
≡ Contac	ts Departments								
1. Sele Medical	ct ASP HE-IL × Save								
2. Dep	artments								
Show 25	$\sim$ entries				Search:		Delet	e unused dep	partments
🗄 Aliases	Department Name						÷	Prompt	Actions $\Rightarrow$
Ŧ	cardiovascular							49	
Ε	consumer sales							49	
	Aliases	۵ 🔸		Prompts					
	consumer sales	• Primary Recognize	Fil	e Options *	<ul> <li>Default</li> </ul>	🔿 Upload 🛛 🔿 Rec	ord		
	sales	O Primary							
						Cancel S	ave		
Ŧ	enterprise sales							49	
÷	finance							40	
Ŧ	line 1							40	
Ŧ	management							49	Ê
÷	marketing							40	
Ŧ	obstetrics							40	

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

## **Contacts Departments**

≡ Contact	s Departments			
1. Selec Medical - H	t ASP HE-IL V Save			
2. Depa	rtments			
Show 100	▼ entries	Search: Delete	e unused dep	partments
± Aliases	Department Name	\$	Prompt 🔶	Actions
Ŧ	cardiovascular		40	
Ŧ	consumer sales		40	
Ŧ	enterprise sales		40	
Ŧ	finance		40	
Ŧ	line 1		40	
Ŧ	management		40	Ē
Ŧ	marketing		40	
+	obstetrics		40	
Showing 1 to 2	3 of 8 entries		<	1 >

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

Contac	cts Departments								
■ Contac	cts Departments								
1. Sele	et ASP - ENUS • Save								
2. Dep	partments								
Show 100	) • entries					Search:	Del	ete unused depar	tments
🗄 Aliases	s Department Name							0 Prompt 0	Actions 0
÷	cardiovascular							4)	
	consumer sales							4)	
	Aliases   commerciales   Primary Receptor   sales  O Primary # 3	•	Prompts  File Options*	<ul> <li>Default</li> </ul>	O Upload	O Record			
							Cancel Save		
Ŧ	enterprise sales							40	
÷	finance							4)	
÷	line 1							4)	
÷	management							()	8
E	marketing							•	
<	NOMEN IN S	_			_	_		•/	•

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

## Figure 4-5: Contacts Departments – Editing Alias

Contac	acts Departments			
■ Contac	acts Departments			
1. Selec	ect ASP II-DNJS • Save			
2. Depa	partments			
Show 100	0 • entries		Search:	
1 Aliases	es Department Name		0 Prompt 0	Actions 0
ŧ	cardiovascular		•	
	consumer sales		•)	
	Aliases  Aliases Alias	C Record		
		Cancel Save		
ŧ	enterprise sales		•	
÷	finance		•)	
ŧ	line1		•	
Ŧ	management			8
÷	marketing		4)	
+	obstetrics		•)	

- 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

Contacts Departments					
≡ Contacts Departments					
1. Select ASP Medical - HE-IL V Save					
2. Departments					
Show 100 • entries		Search:	Delete	unused de	partments
± Aliases	Department Name		$\stackrel{\vartriangle}{=}$	Prompt 🕴	Actions $\Rightarrow$
+	cardiovascular			40	
+	consumer sales			40	
+	enterprise sales			40	
+	finance			40	
+	line 1			40	
+	management			4)	Ē
+	marketing			40	
+	obstetrics			40	
Showing 1 to 8 of 8 entries				<	1 >

- 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.

Contact	s Departments							
1. Selec	t ASP teus	• See						
2. Depa	rtments							
Pos 100	• entries							
Entee	Department Name							
8	or do made							
0	consumer sales							
	Aliases anaurus ulus sales		<b>x Minary I</b> sogra		49 Prompts Rie Options*	8 Defect C type	d O Necord	
				Ţ				Genoi Save
8	anterginal safes							
8	france							
8	tre 1							
8	management							
0	metalog							

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

Conta	ts Departments							
1. Sele Medical	ct ASP •EN-US • Stree							
2. Dep	artments							
Show 100	▼ entries							
• Aliase	5 Department Name							
+	cardiovascular							
•	consumer sales							
	Aliaron			d) Promote				_
	consumer sales	Primary Recognize		A Prompts				
	sales	O Primary	/ ×	File Options*	<ul> <li>Default</li> </ul>	O Upload	Record	
								Cancel Save
+	enterprise sales							
+	finance							
+	line 1							
÷	management							
+	marketing							
+	obstetrics							

- **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.

Conta	cts Departments				
≡ Conta	cts Departments				
1. Sele Medica	ect ASP I-EN-US • Save				
2. Dep show 100	oartments			Search:	Delete unused departments
+	cardiovascular				
-	consumer sales				
	Aliases consumer sales	Primary Recognize	Prompts	Defeuit     O Unicad	C Barrard
	sales		File Options-	Denadic     O Opicad	
					Cancel Save
	enterprise sales				
	Aliases	Primary Recognize	Prompts		
	Sales	O Primary	File Options*	Default O Upload	Record
					Cancel Save

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.



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

Cancel

#### > To upload a prompt:

1. Click the **Upload** option.

Figure 4-10: Upload Prompt

<ul> <li>Image: Arrow Prompts</li> </ul>		
File Options *	O Default <ul> <li>Upload</li> <li>F</li> </ul>	Record
File Name*		
File Description *		
File Upload *	Browse	
		Concel

- 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

Prompts					
File Options*	🔘 Default		d 💿 I	Record	
File Name*					
File Description *					
File Record *		Stop	▶ Play	📥 Download	
					_
				Cancel	Save

- 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

■ Contact	s Departments			
Choose ASP	Medical - EN-US V Save			
Show 100	✓ entries	Search	Delete unused o	lepartments
🗄 Aliases	Department Name	¢	Prompt 0	Actions ,
+	management		-40	Î
+	consumer sales		-0	
÷	enterprise sales		-0	
+	finance		49	
+	marketing		49	
	line 1		40	

### > 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

е		×	
e	This site says		
s	Are you sure you want to delete	e the selected department(s)?	
4	ОК	Cancel	
-			

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 predefined 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

Import Package - Medical

how	100 v entries	Search:	Import Package
+	Name	category 0	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
ŧ	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.

7.

Sariatric Program Bariatric

+ Behavioral Medicine

Cardiac Intensive Care Unit

+ Cafeteria

Cardiac Rehab

how	100 V entries	Search:		Import Package
÷	Name	category 0	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	
Ξ	Audiology	Medical	MEDIC_2006.snd	
	Z Audiology			
	Audiology 🔽 Hearing			
F	Bariatric Program	Medical	MEDIC_2007.snd	

Medical

Medical

Medical

Medical

MEDIC\_2008.snd

MEDIC\_2009.snd

MEDIC\_2010.snd

MEDIC\_2012.snd

## Figure 4-15: Import Package

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

Figure 4-16: Selected Departments

1. Selec	t ASP							
Medical - H	HE-IL V	Save						
2 Dopa	rtmonts							
2. Depa								
Show 100	∨ entries			Search:		Delete	e unused de	partments
$\pm$ Aliases	Department Name	2				¢	Prompt 🕴	Actions
Ŧ	cardiovascular						48	
Ŧ	consumer sales						40	
Ŧ	enterprise sales						48	
÷	finance						48	
Ŧ	line 1						49	
+	management						49	Ê
Ŧ	marketing						48	
Ξ	obstetrics						48	
	Aliases	± +	Prompts					
0	bstetrics	• Primary Recognize 💽	File Ontions *	Default		Recor	' 'd	
A	cute pain services	O Primary	The options -	C Deladic	Opload	U Neco	ŭ	
A	nesthesiology	O Primary						
A	naesthetics	O Primary						
					Cancel	Save		

 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".

						~	Departmen	t successfully	updated!
≡ Contact	s Departments								
1 Soloc	+ ACD								
I. Selec									
wedical -	HEHL Y	ave							
2. Depa	artments								
Show 100	✓ entries				Search:		Delet	e unused de	partments
🗄 Aliases	Department Name						¢	Prompt 🕴	Actions
Ŧ	cardiovascular							49	
+	consumer sales							49	
+	enterprise sales							49	
+	finance							49	
+	line 1							49	
+	management							-4)	Ê
+	marketing							49	
	obstetrics							49	
	Aliasos		<b>⊿</b> @ P	romate	_	_			
	bstetrics	Primary Recognize	<b>1</b> 0 F	Tompts					
4	Acute pain services	O Primary	File Opt	ions*	<ul> <li>Default</li> </ul>	Upload	Record	rd	
1	Anesthesiology	O Primary							
4	anaesthetics	O Primary							
c	אורטופדית לילדינ	O Primary							
	מחלקה אורטופדית לילדינ	O Primary							
						Cancel	Save		

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

New Departme	nt Dictionary						
■ New Department Dictionary - Step 1 of 2							
	1 Department Details	2 Confirm					
Provide Departm	Provide Department Dictionary Details						
IT Menu + More Dictionary	AutoAttendant - F						
	Continue 😔						

- 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

Departments					
E Dictionary List					
Show 100 V entries See					
Department Dictionary	Application Software Package (ASP)	Dialect			
☑ Default	AutoAttendant	HE-IL			
Emp_or_Dep	AutoAttendant	HE-IL			
Showing 1 to 2 of 2 entries		< 1 →			

4. Edit the required fields.

#### Figure 4-21: Edit Department Dictionary Details

Edit Department D	ictionary							
≡ Edit Department Dictiona	ry - Step 1 of 2							
	1 Department Details		2 Confirm					
Provide Department	Provide Department Dictionary Details							
Default	AutoAttendant - HE-IL	• •						
	Continue 💮							

- 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

Departments						
≡ Dictionary List						
Show 100 • entries c						
Department Dictionary ASP Dialect						
Default	AutoAttendant	HE-IL				
US Department	AutoAttendant	HE-IL				
Showing 1 to 2 of 2 entries						

## **Adding a Department Manually**

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

#### > To add a department manually:

- 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

Dep	Departments					
≡D	ictionary List					
Shov	v 100 • entries					
	Department Dictionary					
	Default					
	US Department					
Show	Showing 1 to 2 of 2 entries					

3. Click Add New; the following screen appears:

New Department						
≡ New Department ·	- Step 1 of 2					
	1 Department Details		c	2 Confirm		
Provide Depart	ment Details					
UID	Department Name	Extension	Parent Department			
+ More Departments		•				
	Continue ⊝					

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							
	1			2			
[	Department Details		C	onfirm			
Provide Depart	tment Details						
UID	Department Name	Extension	Parent Department				
ABC	Human Resources	4000					
+ More Departments	l i i i i i i i i i i i i i i i i i i i						
	I						
	Continue ⊖						

- 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

## Departments

Departments

≡ Department Details					+ Add New	😋 Actions 🗸
Show	Show 100 T entries Se					epartment epartment
+		Department Name	Parent Department	🔶 Extensio 🥜 Edit Department		rtment
+		Human Resources		4000	ੰ Delete De	partment
+		Logistics	Admin	4341		active
+		Marcom	Marketing	4242		active
+		Technical Writing	Marketing	4300		active
Show	ing 1	to 4 of 4 entries				< 1 →

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

Figure 4-27: Disabled Department

≡ De	epar	tment Details		+ Add New	😋 Actions 🗸
Show	100	▼ entries		Search:	
+		Department Name	Parent Department	Extension 🗍	Status 🕴
+		Human Resources		4000	active
+		Logistics	Admin	4341	active
+		Marcom	Marketing	4242	disabled
+		Technical Writing	Marketing	4300	active
Show	ing 1	to 4 of 4 entries			< 1 →

# **Activating a Department**

The procedure below describes how to activate a department.

### > To activate a department:

- 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
--------------	------------	------------

≡ Depar	tment	Details					+ Add New	🛠 Actions 🗸
c							🛓 Import Depa	rtments List
Show 100	v	entries				Se	🋓 Export Depar	tments list
+		Department Name	Parent Department	Extension 🕴	Actions		🛉 Activate Dep	artment
+		Human Resources		4000	Transfer to Extension: 4000		Ø Disable Depa	artment
+							🖋 Edit Departm	ient
+		Logistics		4432	Transfer to Extension: 4432		🗊 Delete Depar	rtment
+		Marcom	Marketing	4414	Transfer to Extension: 4414			active
+		Technical Writing	Marketing	4081	Transfer to Extension: 4081			active
Charlest								
Showing 11	0 5 01 5	entries					<	1 >

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

Figure 4-29: Activated Department

## Departments

≡D	E Department Details + Add New & Actions -				
Show 100 • entries Search:					
+		Department Name	Parent Department	Extension 🕴	Status 🔶
+		Human Resources		4000	active
+		Import/Export	International Relations	1009	active
+		Logistics	Admin	4432	active
+		Marcom	Marketing	4414	active
+		Technical Writing	Marketing	4081	active

# **Editing a Department**

The procedure below describes how to edit a department.

- > To edit a department:
- 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

SERVICE MODE • Baruch-E	Doc.com	English Welcome	Admin@Baruch-Doc.Com
epartments			
Dictionary List		•	Add New OC Actions
			Edit Dictionary
ihow 100 🗙 entries		Sea	Delete Dictionary
Department Dictionary	Application Software Package (ASP)		Dialect
Default	AutoAttendant		HE-IL

Figure 4-31: Edit Department Dictionary

=dit Department Di	ctionary	
■ Edit Department Dictiona	ry - Step 1 of 2	
	1 Department Details	2 Confirm
Provide Department l	Dictionary Details	
Dictionary Name	Application Software Package (ASP)	
Dictionary Name Default	Application Software Package (ASP) AutoAttendant - HE-IL	×

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

Figure 4-32: Edit Department – Save Changes

Edit Department					
$\equiv$ Edit Department - Step 2 of 2	≡ Edit Department - Step 2 of 2				
● Department Details				2 Confirm	
Confirm Information					
General					
UID:	ABC				
Department Name:	Human Resources				
Parent Department:					
Extension:	4001				
Actions					
Action 1	Transfer to Extension	Data	4001		
Action 2		Data			
Activate Non-Working Hours Behavior	no				
Prompts					
File Options	Default				
Aliases					
	⊕ Back Save Changes ⊙				

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

## Figure 4-33: Updated Information

## Default - Departments

≡De	Department Details					X <mark>0</mark> Actions ∽
Show	100	) <b>v</b> entries			Search:	
+		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
Show	ing 1	to 5 of 5 entries			<	1 >

# **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

Dep	partments		
≡Di	ictionary List	+ Add Ne	ew 📽 Actions 🗸
Shov	v 100 v entries	Search:	
	Department Dictionary	Application Software Package (ASP)	Dialect
	Default	Medical	EN-US
	Emp_or_Dep	AutoAttendant	EN-US
	medical	Medical	EN-US
Show	ring 1 to 3 of 3 entries		< 1 →

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

Figure 4-35: Selecting Department within Departments List

Default - Departments

∎D	epartment Details + Add New & Actions >							
Shov	ow 100 V entries Search							
ŧ		Department Name	Parent Department	Extension 0	Actions	Status 🔅		
+		Department Name	Department	Extension	Transfer to Extension: Extension	active		
÷		Human Resources		4000	Transfer to Extension: 4000	active		
+		Logistics	Admin	4341	Transfer to Extension: 4341	active		
÷		Marcom	Marketing	4242	Transfer to Extension: 4242	active		
+		тw	HR	marketing	Transfer to Extension: marketing	active		
Shov	ing 1	to 5 of 5 entries				1 >		

4. Click the Actions drop-down list.

Figure 4-36: Selecting Department
-----------------------------------

Default - Departments								
■ Department Details     +							Add New	<b>¢</b> ₿ Actions ∨
						1	🛉 Activate Department	
Show	100	) ▼ entries			Se	a (	Ø Disable Department	
±		Department Name	Parent Department	Extension	Actions	6	🕫 Edit Dep	artment
÷		Department Name	Department	Extension	Transfer to Extension: Extension	1	🗊 Delete D	epartment
÷		Human Resources		4000	Transfer to Extension: 4000			active
Ŧ		Logistics	Admin	4341	Transfer to Extension: 4341			active
Ŧ		Marcom	Marketing	4242	Transfer to Extension: 4242			active
E TV HR marketing scheme schem						active		
Showing 1 to 5 of 5 entries 1						< 1 →		

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

Figure 4-37:	Selecting	Edit	Department
--------------	-----------	------	------------

Edit Department					
General					
UID*	МММ				
Department Name*	Marcom				
Parent Department	Marketing				
Email					
Extension 1	4242				
Extension 2					
Extension 3					
DTMF Routing key					
Actions					
Action 1 Transfer to Extension Tata	4242				
Activate Non-Working Hours Behavior					
Prompts					
File Options	Current				
file	► Play				
File Name*	Business Hours				
File Description*	Recording to be played during business hours				
Aliases	+ Save Changes				

- 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:

Actions	-		
Action 1	Transfer to Extension	Data	4432
Activate Non-Wor	Transfer to Operator		
	Disconnect		
Prompts	Transfer to Phone		
File Options	Silent Transfer to Phone		Default
	Transfer to Extension		()
Aliases	Send SMS		•
	Transfer to Queue		Save Changes

### 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 **s**icon; the following appears:

 $\succ$ 

## Figure 4-40: Write SMS

WRITE SMS
Characters: 0/459 Parts: 0/3
Close OK
<ul> <li>Write the SMS, and then click OK. The SMS is sent as the first Action Type for the appropriate key.</li> </ul>
<ul> <li>Note that the number of characters in the SMS, is limited by the allowed message parts and the language type used.</li> </ul>
<ul> <li>Sending an SMS must be followed by an action.</li> </ul>
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.
• <b>Transfer to Queue:</b> 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

Actions	
Action 1 Transfer to Extension 💌	Data 4242
Activate Non-Working Hours Behavior	
Working Hour Set*	Default
Action 1 Transfer to Extension 💌	Data 4242
Ignore Non-Working Hours Behavior*	Employees 👻
Prompts	
File Options	Current
file	► Play
File Name*	Business Hours
File Description*	Recording to be played during business hours
Aliasas	<b>A</b>
Allases	

**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:
--------------

Actions				
Action 1	Send SMS 🔹	Data		1
Action 2	bisconnect			
Activate Non-Wor	Disconnect			
Working Hour Set	Transfer to Phone			<b></b>
Action 1	Silent Transfer to Phone	Data	4432	
Ignore Non-Work	Transfer to Extension			
Prompts	Send SMS			
File Options	Transfer to Queue		Default	•
Aliases				•
			Sa	ave Changes

- 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 S icon; the following appears:

### Figure 4-44: Write SMS

## WRITE SMS

	Characters	: 0/459 Parts: 0/3
	Close	ок

- 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

Actions			
Action 1	Transfer to Extension	Data	4242
Activate N	on-Working Hours Behavior		
Working H	lour Set*		Default
Action 1	Transfer to Extension 💌	Data	4242
Ignore No	n-Working Hours Behavior*		Employees 🔷
			None
Prompts	5		Anonymous
File Optior	ns		Employees
file			► Play
File Name	*		Business Hours
File Descri	ption*		Recording to be played during business hours
Aliases			•
			Save Changes

- **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:**
- 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:

General		
UID*	MMM	
Department Name*	Marcom	
Parent Department	Marketing	
Email		
Extension 1	4242	
Extension 2		
Extension 3		
DTMF Routing key		
Actions		
Action 1 Transfer to Extension 👻	Data 4242	
Activate Non-Working Hours Behavior	$\bigcirc$	
Prompts		
File Options	Default	Ψ.
Aliases		•

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.



Prompts	
File Options	Upload 🔻
File Name*	Business Hours
File Description*	Recording to be played during business hours
File Upload*	Choose File
Aliases	9
	Save Changes

- 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.

Prompts	
File Options	Upload 💌
File Name*	Business Hours
File Description*	Recording to be played during business hours
File Upload*	Inbound Call.wav Choose File
Aliases	<b>e</b>

 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
-------------	----------	-----	--------	---------

Prompts	
File Options	Record
File Name*	Business Hours
File Description*	Recording to be played during business hours
File Record*	⑦ Record ■ Stop ▶ Play ★ Download
Aliases	0
	Save Changes

- **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:
- 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

Aliases		+
		Save Changes

6. Enter the alias name(s).

Aliases	•
Marc	•
Marc_Dept	
	Save Changes



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
Aliases	0

Aliases	•
Marc	
Marc_Dept	
	Save Changes

- 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

Department Aliases
--------------------

≡ Department Aliases				
Aliases and the departments to which they are mapped				
Show 100 v entries		Search:		
Alias Name 🍦	Departments	Action		
Cardiac Services	Cardiology     Diabetes Center	Add alias to a department		
Diabetes	Anaesthetics     Diabetes Center	Add alias to a department		
Cardiovascular	■ Cardiology	Add alias to a department		
Showing 1 to 3 of 3 entries		< 1 >		

- 2. Place the cursor on the Alias that you wish to have the department mapped to.
- 3. In the Action column, click the Addates to adepartment 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

Add alias to department		
select department:		
Anaesthetics		
Cardiology Diabetes Center		
Endocrinology		
	Caulo	Concol
	Save	Cancel

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

## Figure 4-54: Department Aliases - Example

## **Department Aliases**

≡ Department Aliases			
Aliases and the departments to which they are mapped			
Show 100 v entries Search:			
Alias Name	Departments	Action	
Cardiovascular		Add alias to a department	
Cardiac Services	Cardiology     Cardiology     Diabetes Center	Add alias to a department	
Diabetes	â Anaesthetics	Add alias to a department	
Showing 1 to 3 of 3 entr	ies	< 1 →	

## > To delete an Alias from a Department:

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

Figure 4-55:	Department Aliases
	0

Department Aliases

,

I	≡ Department Aliases							
Aliases and the departments to which they are mapped								
Show 100 v entries Search:								
)	Alias Name	Departments v	Action					
	Cardiovascular	Cardiology      Diabetes Center     Endocrinology	Add alias to a department					
	Cardiac Services	Cardiology      Diabetes Center	Add alias to a department					
	Diabetes	â Anaesthetics	Add alias to a department					
	Showing 1 to 3 of 3 entries $\langle 1 \rangle$							

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

Contacts Departments Aliases

≡ Department Aliases						
Aliases and the departments to which they are mapped						
Show 100 v entries Search: consumer						
Alias Name	Departments	Action				
Sales	Consumer sales	Add alias to a department				
Showing 1 to 1 of 1 entries (filtered from 3 total entries)						

## **Deleting a Department**

The procedure below describes how to delete a department.

- > To delete a department:
- 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**.
- 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:

- 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

### Departments

E Department Details     Add New     Actions ✓					
Show 100 • entries Search: Marcom					m
+		Department Name	Parent Department	Extension 🕴	Status 🔶
+		Marcom	Marketing	4414	active
Showing 1 to 1 of 1 entries (filtered from 5 total entries)					< 1 →

# **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

						+ Add New OC Action
how 100 • entries 5e g						<ul> <li>Import Departments L</li> <li>Export Departments list</li> </ul>
		Department Name	Parent Department	Extension	Actions	Activate Department
+		Finance		4451	Transfer to Extension: 4451	Ø Disable Department
÷	8	pnimit a	pnimit	6123	Transfer to Extension: 6123	/ Edit Department
howing 1 to 2 of 2	t entries					Delete Department

## **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 Dep	partments List				
📥 Import Departments List	×				
Import your departments list from <b>CSV</b> or <b>Excel</b> files					
Overwrite empty departments aliases					
Encoding: UTF-8 V					
Choose File No file chosen					
The best starting point Use an empty template Get csv template   Get excel template Both files must be save in UTF-8 encoded format.					
	Cancel 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

Pre-Import Report

≡ Pre-Import Details					
Notice: The system is currently pending for action					
Status	Records	Preview			
New Entity	52	۲			
Items that will be enabled (Already Exist)	0				
Update	0				
No Change	0				
Items to be disabled	0				
✓ Confirm Import ¥ Cancel Import					

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.

 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:



# Default - Departments

■ Department Details

Note: You haven't completed your previous task. To continue operating with the system, please click here to complete your task

- **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.



Export Departments list	×
<ul> <li>Please choose</li> <li>Export Active and Inactive Departments</li> <li>Export Active Departments List</li> <li>Export Inactive Departments List</li> <li>Export your debugepartments list in CSV or Export your your debugepartments list in CSV or Export your your your your your your your your</li></ul>	List <b>«cel f</b> iles
Cancel	Export Departments list (CSV, Excel) Excel file .xlsx Csv file .csv

- 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 E	Branches
-------------	------------	----------

## Branches

≡ B	rand	ch Details	+ Add New of Actions -
Shov	v 10	0 ▼ entries	Search:
+		Branch Name	Phone Number $$$$
+		Central Branch	039991111
+		Northern Branch	0988866
+		Southern Branch	089999090
Shov	ving 1	to 3 of 3 entries	< 1 >

# **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

### **Branches**

≡B	ran	ch Details	+ Add New 🛛 😋 Actions 🗸
Shov	v 10	0 ▼ entries	Search:
+		Branch Name	Phone Number
+		Central Branch	039991111
+		Northern Branch	0988866
+		Southern Branch	089999090
Show	ing 1	to 3 of 3 entries	< 1 →

2. Click Add New; the following screen appears:

New Branch				
≡ New Branch - Ste	p 1 of 2			
		1 Branch Detail	s	
Provide Branch	Details			
UID	Branch Name	Phone Number	Pivot	
			אבו גוש	•
+ More Branches				
		Continu	ie ⊖	

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

New Branch						
≡ New Branch - Step 2 of 2						
	1 v Br	ranch Details			2	Confirm
Confirm Information						
	Branches:	UID	Branch Name	Phone Number	Pivot	
		114444	Center	03443322	חולון	
			e Information ④			

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
-------------	---------------	--------

Edit Branch	
≡ Edit Branch - Step 1 of 2	
	Branch Details
•	
General	
UID	ссср
Branch Name	Southern Branch
Phone Number	r 089999090
Pivot	۲ בארשבע
Prompt	
File Options	• • Default Oupload Record
Cities	
× × Add City	
A.B	
Allases	
+ More Aliases	
	Continue 🟵

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

Edit Branch	
≡Edit Branch - Step 2 of 2	
1 ~ B	Branch Details
Confirm Information	
General	
UID:	СССР
Branch Name:	Southern Branch
Phone Number:	089999090
Pivot:	בארשבע
Prompt	
File Options	Default
Cities	
Aliases	
	⊕ Back Save Changes ④

Edit Branch - Step 2

Figure 5-6:

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.



Edit Branch		
$\equiv$ Edit Branch - Step 1 of 2		
1 Bra	nch Details	2 Confirm
General		
UID★	CCCD	
Branch Name*	Southern Branch	
Phone Number	089999090	
Pivot*	באר שבע	<b>9</b>
Prompt File Options*	Default      Upload      Record	
Cities		
א א Add City		
Aliases		
+ More Aliases		
	Continue	

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:

Nearby C	ities			×
	City	Distance [km]	Population [%]	Branches
	באר שבע	0	2.524	Southern Branch
	עומר	8.73	0.091	
	חצרים	10.58	0.009	
	תל שבע	10.91	0.211	
	שגב-שלום	11.65	0.101	
	אום בטין	13.08	0.03	
	נבטים	13.98	0.009	
	לקיה	15.33	0.124	
	תראבין	15.68	0.005	
	אשל הנשיא	16.71	0.003	
	גבעות בר	16.84	0.005	
	להבים	17.46	0.078	
				1 2 2 4 5 12
				1 2 3 4 3 12
				Add Cities Close

### 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.

•	City	Distance [km]	Ť	Population [%]		Branch	25	
	באר שבע	0		2.524		Southern	Branch	
~	עומר	8.73		0.091				
~	חצרים	10.58		0.009				
~	תל שבע	10.91		0.211				
~	שגב-שלום	11.65		0.101				
	אום בטין	13.08		0.03				
	נבטים	13.98		0.009				
	לקיה	15.33		0.124				
	תראבין	15.68		0.005				
	אשל הנשיא	16.71		0.003				
	גבעות בר	16.84		0.005				
	להבים	17.46		0.078				
	אל סייד	18.03		0.04				
					1 2	2	4	
					1 2	3	4 :	 1

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

Edit Branch		
≡Edit Branch - Step 2 of 2		
	1 .	Branch Details
Confirm Information		
General		
	UID:	CCCD
	Branch Name:	Southern Branch
	Phone Number:	089999090
	Pivot:	באר שבע
Prompt		
	File Options	Default
Cities		
		באר שבע
		תל שבע
		עמר
Allases		
		O main a sea damas O
		Back Save Changes (3)

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:

Edit Branch	
≡ Edit Branch - Step 1 of 2	
Bra	unch Details
General	
UD*	CCCD
Branch Name*	Southern Branch
Phone Number	089999090
Pivot*	בארשבע 🗸
Prompt	
File Options*	Default     Upload     Record
Cities	
× × Add City	
Aliases	
+ More Aliases	
_	
	Continue 🗇

#### 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 D	Details
--------------	-----------------	---------

### New Prompt

≡ Prompt Details	
File Name*	Business Hours
File Description*	Recording to be played during business hours
File Upload/Record*	Upload     Record     Choose File     No file chosen
	Save Information  Gancel

- 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.



New Prompt	
≡ Prompt Details	
File Name*	aa
File Description*	88
File Upload/Record*	Upload   Record
	O Record         Stop         Play         Download
	Save Information () Cancel

- 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:

1 Branch Details				
General				
UID*	AA			
Branch Name*	Central Branch			
Phone Number	039991111			
Pivot*	ס ע ביתשמש			
Prompt				
File Options*	Default Olpload Record			
Cities				
× * + Add City				
Aliases				
-				
+ More Aliases				
	Continue 🕢			

5. Enter the alias name(s).

#### Figure 5-15: Create an Alias for a Branch

General		
	UID*	AA
	Branch Name*	Central Branch
	Phone Number	039991111
	Pivot*	בתשמש
Prompt		
	File Options*	Default Upload Record
Cities		
× × 🔸 Add City		
Aliases		
קניון נעמי		
מגדל המים		
		Continue G

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

Edit Branch	
≡ Edit Branch - Step 2 of 2	
▼ E	Branch Details
Confirm Information	
General	
UID:	AA
Branch Name:	Central Branch
Phone Number:	039991111
Pivot:	בית שמש
Prompt	
File Options	Default
Cities	
Aliases	
	קרן נעמי מגדל המים
	Back Save Changes

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

### **Unmapped** Cities

≡ Unmapped Cities					
View cities not mapped to branches out of most populated cities (%): 80%  Unmapped cities that are part of the 80% most populated cities are shown in red. It is highly recommended to map them.					
Show 100 • entries			Search:		
City \$	Population [%]	Action \$	Auto map branch		
אשדוד	2.729	Add city to branch			
פתח תקווה	2.704	Add city to branch			
נתניה	2.438	Add city to branch			
חולון	2.347	Add city to branch			
בני ברק	2.099	Add city to branch			
רמת גן	1.903	Add city to branch			
בתים	1.647	Add city to branch			
רחובות	1.519	Add city to branch			

### **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

**Unmapped** Cities

≡ Unmapped Cities 🕫 Auto map 🗸					
_			☆ By distance		
View cities not mapped to br	anches out of most populated	cities (%): 80%	☆ Selected branch		
Unmapped cities that are pa	rt of the 80% most populated c	ities are shown in <mark>red.</mark> It is highl	y re 🔺 Cancel auto map		
them.					
Show 100			Coourse .		
			Search:		
City \$	Population [%]	Action $\Leftrightarrow$	Auto map branch		
אשדוד	2.729	Add city to branch			
פתח תקווה	2.704	Add city to branch			
נתניה	2.438	Add city to branch			
חולון	2.347	Add city to branch			
בני ברק	2.099	Add city to branch			
רמת גן	1.903	Add city to branch			
בת ים	1.647	Add city to branch			
רחובות	1.519	Add city to branch			

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

Unmapped Cities

≡ Unmapped Cities			😂 Auto map 🗸	
View cities not mapped to branches out of most populated cities (%): 80%  Unmapped cities that are part of the 80% most populated cities are shown in red. It is highly recommended to map them.				
Show 100 • entries			Search:	
City \$	Population [%]	Action $ riangleta$	Auto map branch	
אשדוד	2.729	Add city to branch	Central Branch	
פתח תקווה	2.704	Add city to branch	Central Branch	
נתניה	2.438	Add city to branch	Central Branch	
חולון	2.347	Add city to branch	Central Branch	
בני ברק	2.099	Add city to branch	Central Branch	
רמת גן	1.903	Add city to branch	Central Branch	
בתים	1.647	Add city to branch	Central Branch	
רחובות	1.519	Add city to branch	Central Branch	

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

auto map all cities to selected branch	
select branch:	
Northern Branch	•
	Save Cancel

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

Unmapped Cities

≡ Unmapped Cities 😽 😽 🕹 🖉					
View cities not mapped to branches out of most populated cities (%): 80%  Unmapped cities that are part of the 80% most populated cities are shown in red. It is highly recommended to map them.					
Show 100 v entries Search:					
City \$	Population [%]	Action $ ilde{}$	Auto map branch		
אשדוד	2.729	Add city to branch	Northern Branch		
פתח תקווה	2.704	Add city to branch	Northern Branch		
נתניה	2.438	Add city to branch	Northern Branch		
חולון	2.347	Add city to branch	Northern Branch		
בני ברק	2.099	Add city to branch	Northern Branch		
רמת גן	1.903	Add city to branch	Northern Branch		
בתים	1.647	Add city to branch	Northern Branch		
רחובות	1.519	Add city to branch	Northern Branch		
אשקלון	1.509	Add city to branch	Northern 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

### Unmapped Cities

≡ Unmapped Cities			<b>0</b> <sup>0</sup> 8 Auto map ∽		
View cities not mapped to branches out of most populated cities (%): 80%  Unmapped cities that are part of the 80% most populated cities are shown in red. It is highly recommended to map them.					
Show 100 . entries			search:		
City 🔶	Population [%]	Action $ equation$	Auto map branch		
אשדוד	2.729	Add city to branch			
פתח תקווה	2.704	Add city to branch			
נתניה	2.438	Add city to branch			
חולון	2.347	Add city to branch			
בני ברק	2.099	Add city to branch			
רמת גן	1.903	Add city to branch			
בת ים	1.647	Add city to branch			
רחובות	1.519	Add city to branch			

**3.** Select the branch you want to map to.

#### Figure 5-24: Unmapped Cities- Select Branch Manually

A	dd city to branch	
5	select branch:	
	Central Branch	]
_	Central Branch Northern Branch	
	Southern Branch	
	Western	

- 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

### **Branches**

≡ Br	and	h Details	+ Add New	o: Actions ~		
	_		🖋 Edit Branch	ı	ſ	
Show	10	0 • entries	5	🖻 Delete Bra	nch	
+		Branch Name	Phone Number		4	•
+		Northern Branch	0988866			
+		Central Branch	039991111			
+		Southern Branch	089999090			
+		Western	0699999999			
Show	ing 1	to 4 of 4 optrior				
5110W	ing i	to 4 or 4 entries			< 1 →	

- 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:

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

Figure 5-26:	Overlapping	Branches	Example
--------------	-------------	----------	---------

Overlapping Branches	;				
≡ Overlapping Branches					
The cities below have been mapped to	o more than one branch				
Show 100 • entries			Search:		
City \$	Population [%]	Branches			
ירושלים	10.339	📾 געיף ירושלים 🛱 גרסה צין-גרים			
עפולה	0.531	מירה 😫 מייח			
ביתר עילית	0.51	🔿 מריצין מעריי אלים 🔒 🛛 מריצין			
מבשרת ציון	0.325	מניף ירושלים 🗃 בבצת רם 😫			
אופקים	0.313	🖹 מניף באר שבע 🖹 מניף באר שבע			
אבן יהודה	0.152	הרצליה 🔒 נוצרה			
onn'	0.106	📾 סניף באר שבע			
Showing 1 to 7 of 7 entries			< 1 →		

- 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.



Branches					
Branch Details					+ Add New C Actions -
Show[100 • entries Set				<ul> <li>Import Branches List</li> <li>Export Branches list</li> </ul>	
+	8	Branch Name	Phone Number 0	Pivot	🥒 Edit Branch
Ŧ	8				Delete Branch
ŧ					
÷		באר שבע			
٠					
+	۰				
÷	8	קניון אילון	654		
÷	8				
÷			036030127		
÷	۲				
÷	۲	קבון רחובת	089493408		
Showing 1 to 10 of 10 en	tries				< 1 →

Showing 1 to 10 of 10 entries

# **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.



- 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

Pre-Import Report

≡ Pre-Import Details		
Notice: The system is currently pending for action		
Status	Records	Preview
New Entity	52	۲
Items that will be enabled (Already Exist)	0	
Update	0	
No Change	0	
Items to be disabled	0	
✓ Confirm Import X Cancel Import		

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.

- Click Confirm Import to import the branches. 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 branches will be disabled. The following message appears:

Figure 5-30: Uncompleted Branch Import

Branches



- 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:

A	В	С	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.

🛓 Export Branches list		>	×
Export your branches list in <b>CSV</b> or <b>Ex</b>	<b>cel</b> files		
	Cancel	Export Branches list (CSV, Excel)	
	•	Excel file .xlsx Csv file .csv	

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:

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

Overall Performance				
The Options				
Date From	<b>m</b>			0
Date To	<b></b>			0
- ··-				
Call Source			Exact	~
Call Routed			Exact	~
Call Duration		to		
Call Disposition	Any			~
DNIS	Any	*		
Timezone Display Mode	Tenant Time zone			~

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:**

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

IVR Reports	
≡ Drill-down	
▼ Filter Options	
Date From	Ô
Date To	<b>@</b>
Call Source	Exact 🗸
Call Routed	Exact 🗸
Call Duration	to
Call Disposition	Any ~
DNIS	Any -
Timezone Display Mode	Tenant Time zone
	Tenant Time zone
	Local Time zone (Web)

### 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

F	Filter Summary										
۲	۲ Filter Options										
Sho	Show 25 v entries Search										
#	Service	Domain 🔶	Source 🔅	Destination	Start Time	End Time	Timezone 🕴	Duration $\Leftrightarrow$	Disposition $\Leftrightarrow$	Routed To	<b>4</b> 9 ÷
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		40
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		40
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		40
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		40
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		40
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		40
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		40
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		40
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		40
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	40

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.
<b>∢</b> »)	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:

212	Attended	Attended.com	5103	4567	2021-07-26 09:41:26	2021-07-26 09:41:44	UTC +0:00	18	Transfer	5102	40
	Result String	s	tate ID	Gra	mmar		Confidence		Liste	n Record	
	Station		1	N	lain		92		▶ 0:00 / 0:02 =		

### 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 recog- nition 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 rel- evant confidence threshold, please consult with AudioCodes Sup- port.
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:

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

IVR Reports				
≡ Call Date				
▼ Filter Options				
Date From	<b>m</b>		٥	
Date To	<b>#</b>		٥	
Call Source			Begins wit	,
Call Routed			Begins wit	•
Call Duration		to		
Call Disposition	Any			•
DNIS	Any		Ŧ	
Timezone Display Mode	Tenant Time zone		`	•
	✓ Generate 🗮 Export CSV	▼ Reset Filter		

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.





### 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:**

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

Figure 6-7:	Call Hour	IVR Filter	Options
-------------	-----------	------------	---------

IVR Reports			
≡ Call Hour			
▼ Filter Options			
Date	24/08/2021	<b></b>	
Call Duration	to		
DNIS	Any	Ŧ	
Timezone Display Mode	Tenant Time zone	~	
	✓ Generate Export CSV	▼ Reset Filter	

- 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

 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:

 Open the Filter Options screen (Reports > IVR Reports > Requested Contacts); the following appears.
Figure 6-9:	<b>Requested Contacts Report Filter</b>	
-------------	---	--

IVR Reports		
■ Requested Contacts		
▼ Filter Options		
Date From	<b></b>	0
Date To	<b></b>	O
Menu	Any	~
Timezone Display Mode	Tenant Time zone	~
	✓ Generate Export CSV	▼ Reset 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

/R Reports		
Requested Contacts		
▼ Filter Options		
Date From	<b>*</b>	Ø
Date To	<b>*</b>	O
Menu	Any	~
Timezone Display Mode	Any Default Speech Menu Default Speech Branch Menu	
	Contacts Departments	

- 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



IVR Reports										
■ Requested Contact	ts									
Filter Summary										
▼ Filter Options										^
Show 25 • entries									Search:	
Show 25 • entries	Calls \$	Transfer Extension 🕴	Transfer Mobile 🔅	Disconnect 🔅	Operator 🔅	Operator Request 🔅	Operator DTMF	Transfer Failed 🔅	Search:	Miscellaneous 🔶
Show 25 • entries	Calls \$	Transfer Extension 0	Transfer Mobile 🕴	Disconnect ≬	Operator 0	Operator Request 0	Operator DTMF 🔶 0	Transfer Failed 🕴	Search: Not at working Hours $\phi$ 0	Miscellaneous $\phi$ 3
Show 25 • entries Contact Name Adl Edna	Calls ¢ 3 1	Transfer Extension 🔶 0 0	Transfer Mobile 🔶 0 0	Disconnect 0 0 0	Operator 🔶 0 0	Operator Request 0 0 0	Operator DTMF 0 0 0	Transfer Failed 🔶 0 0	Search Not at working Hours 0 0	Miscellaneous 🔶 9 3 1
Show 25 • entries Contact Name A Adi Edna Ami	Calls ¢ 3 1 4	Transfer Extension 0 0 0 0 0	Transfer Mobile 🔶 0 0 0	Disconnect 🔶 0 0 0	Operator 🔷 O O O	Operator Request 0 0 0 0	Operator DTMF 0 0 0 0	Transfer Failed 0 0 0 0	Search Not at working Hours 0 0 0	Miscellaneous 3 1 4

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:

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

#### **Requested Departments**

IVR Reports			
■ Requested Departments			
▼ Filter Options			
Date From		<b></b>	O
Date To		<b>*</b>	O
Menu	Any		~
	✓ Generate     Export CSV	▼ Reset Filter	

- 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

IVR Reports				
■ Requested Departments				
<b>▼</b> Filter Options				
Date From	01/09/2020	<b>**</b>	0	
Date To		<b>**</b>	0	
Menu	Any		~	
	Any Default Speech Men Default Speech Bran Emp_or_Dep_Menu Contacts Departments	u ich Menu		

- 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



IVR Reports									
■ Requested Departments	5								
Filter Summary									
▼ Filter Options									^
Show 25 • entries								Sear	rch:
Department Name	Calls $\phi$	Transfer 🕴	Disconnect 0	Operator 🔅	Operator Request 🛛 🗄	Operator DTMF 🛛 🗄	Transfer Failed 🕴 🕴	Not at working Hours	Miscellaneous \$\phi\$
Marketing	1	1	0	0	0	0	0	0	0
Purchasing	1	0	0	0	0	0	0	0	1

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:

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

## Call Queue Reports

≡ Call Queue Overall		
<b>T</b> Filter Options		
Queue Name	Any	~
Date From		O
Date To	<b>m</b>	O
Call Source		Exact 🗸
Call Destination		Exact 🗸
Wait Time (Sec.)	to	
Status	Any	~
Timezone Display Mode	Tenant Time zone	~
	✓ Generate	er

- 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

C	all	Queue Re	ports					Ò					
	I Cal	ll Queue Overal	I										
	<b>∀</b> Fi	lter Options											^
s	how	25 v entries										Search	:
				Total Incomin	g Calls		Transferre	ed		Abandon	ed		
	#	Queue Name	Calls $\Rightarrow$	Avg Wait Time (Sec.)	Max Wait Time (Sec.)	Calls $\Rightarrow$	Avg Wait Time (Sec.)	Max Wait Time (Sec.)	Calls 👌	Avg Wait Time (Sec.)	Max Wait Time (Sec.) 👙	Max Time Overflow	Max Limit Overflow
	1	Queue1	41	33.56	68	6	32.66	62	13	0.00	0	18	4
s	howir	ng 1 to 1 of 1 entries											< 1 →

# **Drilldown Report**

The procedure below describes how to generate an Overall report.

## > To generate an Drilldown report:

 Open the Filter Options screen (Reports > Call Queues Reports > Drilldown); the following screen appears:

#### Call Queue Reports

,				
Call Queue Drilldown				
▼ Filter Options				
Queue Name	Any			~
Date From	<b>m</b>			Ø
Date To	<b>#</b>			0
Call Source			Exact	~
Call Destination			Exact	~
Wait Time (Sec.)		to		
Status	Any			~
Timezone Display Mode	Tenant Time zone			~
	✓ Generate Export CSV	▼ Reset Filter		

- 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

Call Queue Reports

≡ Call	E Call Queue Drilldown								
<b>▼</b> Fil	▼ Filter Options								
Show	how 25 v entries Search								
# ^	Queue Name	Source $\Rightarrow$	Destination $\Leftrightarrow$	Start Time 🔶	End Time $\Rightarrow$	Timezone \$	Duration $ arrow$	Status $\Leftrightarrow$	
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:**

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

#### Figure 6-14: Branches by Date Filter Options

**Branch Reports** 

■ Branches by Date					
▼ Filter Options					
	Date From	<b>#</b>	Ø		
	Date To	<b>m</b>	Ø		
	🗸 🗸	enerate TReset Filter			

- 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:



Branch Repo	ts
≡ Branches by Da	
Filter Summary Date From: 22/06/20	71
<b>T</b> Filter Options	×
<b>1</b>	Transferred Calls
▶ 6/22/2017	267
▶ 6/23/2017	93
▶ 6/24/2017	4
▶ 6/25/2017	335
▼ 6/26/2017 Total	281
אילת	2
אשדוד	3
אשקלון	6
באר שבע	1
בית שמש	8
הרצליה	8
חדרה	15
חיפה	24
טבריה	2
יהודה ושומרון	4

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.

Branches by Date		
Filter Summary	Field Chooser	×
Customer: Any	All	Rows
	V Branch	Date Sort
Filter Options	<ul> <li>Customer</li> </ul>	Branch T T
-	✓ Date	Customer
R .	Day	
/1/2016	Month	Filter
9/4/2016	Transferred Calls	
9/11/2016	Year	
5/27/2017		
7/2/2017		
1/27/2017	T Filter	∑ Data
2/6/2017		Transferred Calls
ansferred Ills		

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:

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

Branch Reports			
≡ Branches by Date			
▼ Filter Options			×
Date From	<b>#</b>	Õ	
Date To	<b>m</b>	٥	
	✓ Generate T Res	et Filter	



- 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

Brand	ch Reports	
≡ Requ	uested Dest. by I	Date
Filter Date I	r Summary From: 22/06/2017	
<b>▼</b> Filte	er Options	×
p 🗈	i	Transferred Calls
▶ 6/22/2	2017	267
▶ 6/23/2	2017	93
▶ 6/24/2	2017	4
▶ 6/25/2	2017	335
₩ 6/26/2	2017 Total	281
ניבים	אב	5
אילת	(	2
וריאל	Я	4
שדוד	אני	3
שמש	בית ש	8
גבת		5
גיתה	1	1
חב'ב	т	3
האון		2
מדייה	เล	6

# **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:

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

## Figure 6-19: Overall Performance App Filter Options

App Reports			
≡ Overall Performance			
Y Filter Options			
User	Any	v	
Date From	<b>m</b>	Ø	
Date To	<b>#</b>	Ø	
Call Disposition	Any	•	
OS Type	Any	•	
	✓ Generate	▼ Reset Filter	

- 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:**

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

Figure 6-21: Drill-down App Filter Options

App Reports				
≡ Drill-down				
<b>▼</b> Filter Options				
User	Any		v	
Date From	<b>#</b>		٥	
Date To	<b>#</b>		0	
Call Disposition	Any		•	
OS Type	Any		v	
	✓ Generate	≣ Export CSV	<b>▼</b> Reset Filter	

- 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

App Reports

≡ D	≡ Drill-down								
Υ	▼ Filter Options ^								
Shov	v 25 🔻 e	ntries						Search:	
#	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
з	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:

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



<b>▼</b> Filter Options	
User	
Date From Date To	
Disposition	Any
OS Type	Any <b>v</b>
	✓ Generate         ≣ Export CSV         ▼ Reset Filter

- 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

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

Figure 6-25:	Action	Hour Ap	p Filter	Options
--------------	--------	---------	----------	---------

# App Reports

≡ Action Hour		
<b>▼</b> Filter Options		~
User	<b></b>	
Date	05/11/2017	
	✓ Generate         ≣ Export CSV         ▼ Reset Filter	

- 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:

2:00 - 3:00

3:00 - 4:00

0

0

0

0

0

0

- Generate to view the report output.
- Export CSV to export the report is CSV format.
- Reset Filter to reset the filter values.



0

0

0

0

0

0

0

0

0

0

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.

Table 6-7: Action Hour App Report Description	Table 6-7:	Action	Hour	App	Report	Descriptions
---	------------	--------	------	-----	--------	--------------

# **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:**

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

ons
or

App Reports

≡ Action Usage		
▼ Filter Options		
Customer	Any	X Y
Date From	8	0
Direction		
OS Time	Any	
	101	
	Generate T Reset Filter	

- 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

Prompts	
≡ Prompt Details	+ Add New
NO data available	

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

	D	ror	mnt
$\mathbb{I}$		U	IIDL

≡ Prompt Details	
File Name*	
File Description*	
File Upload/Record*	Upload Record     Choose File No file chosen
	Save Information ()

**3.** Enter the prompt details in the fields provided.

Figure 7-3: New Prompt Details

New Prompt

≡ Prompt Details	
File Name*	Business Hours
File Description*	Recording to be played during business hours
File Upload/Record *	Upload Record     Choose File No file chosen
	Save Information 🛞 Cancel

- 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.

ompt Details		
•	ile Name* aa	
File De	scription* aa	1
File Uploa	d/Record* 🛛 🛛	Upload 💿 Record
	ø	Record Stop Play Lownload

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:

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

Figure 7-5:	Call Flow	/ Settings
-------------	-----------	------------

Flow Settings								
Shov	w 100 💙 entrie	15						Search:
	DNIS Number	DNIS Name 🕴	Timezone 🕴	Working Hour Set 🕴	Employees Working Hours Menu 👙	Employees Non-Working Hours Menu	Non-Employees Working Hours Menu	Non-Employees Non-Working Hours Menu
	112233		UTC +0:00	Default	Default Speech Menu	Default Speech Menu	Default Speech Menu	Default Speech Menu
	332211		UTC +0:00	Default	Default Speech Branch Menu	Default Speech Branch Menu	Default Speech Branch Menu	Default Speech Branch Menu
	445566	Main	UTC +0:00	Default	Emp_or_Dep_Menu	Emp_or_Dep_Menu	Emp_or_Dep_Menu	Emp_or_Dep_Menu
Showing 1 to 3 of 3 entries								

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/nonworking 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:

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

New Flow Settings		
■ New Flow Settings - Step 1 of 2		
1 Flow S	Settings Details	
Provide Flow Settings Details		
DNIS Number*		
DNIS Name *		
Timezone *	Select Timezone	
Working Hour Set*	~	
Employees Working Hours Menu *	~	
Employees Non-Working Hours Menu*	~	
Non-Employees Working Hours Menu *	~	
Non-Employees Non-Working Hours Menu *	~	
	Continue	

Figure 7-6: Add New Flow Settings

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

New Flow Settings					
■ New Flow Settings - Step 2 of 2					
1 v Flow Settings Details 2					
Confirm Information					
DNIS Number:	12335				
DNIS Name:	abc				
Working Hour Set:	Default				
Employees Working Hours Menu:	Default Speech Menu				
Employees Non-Working Hours Menu:	Default Speech Menu				
Non-Employees Working Hours Menu:	Default Speech Menu				
Non-Employees Non-Working Hours Menu:	Default Speech Menu				
	Back Save Information				

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

Fl	O١	v Settings								
									+ Add New	📽 Actions 🗸
Show 100 entries								Edit Flow Se Delete Flow	ttings Settings	
		DNIS Number	DNIS Name $\Rightarrow$	Working Hour Set 🕴	Employees Working Hours Menu  🍦	Employees Non-Working Hours Menu 🔅	Non-Employees Working Hours Menu 🔅	Non-Employees	Non-Working Ho	urs Menu 🔶
		+5437653545466356876473+	asdfasdf	hgyhg	medic - contact	DTMF to Menu	Erez2	DTMF to Menu		
		45456456454	test 2.11.00	Default	ErezDtmf	ErezDtmf	Erez1	Erez2		
		4990	tets2	Default	DTMF to Menu	DTMF to Menu	DTMF to Menu	DTMF to Menu		
	•	56789	גכעיכע	hgyhg	speech	speech	speech	speech		
s	how	ng 1 to 4 of 4 entries							<	1 >

- 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

F	lov	w Settings								
									+ Add New	✿ Actions ∽
	5how	100 • entries							<ul> <li>Edit Flow S</li> <li>B Delete Flow</li> </ul>	attings / Settings
		DNIS Number	DNIS Name 🕴	Working Hour Set ≬	Employees Working Hours Menu	Employees Non-Working Hours Menu 🕴	Non-Employees Working Hours Menu	Non-Employees	Non-Working Ho	ours Menu ≬
		+5437653545466356876473+	asdfasdf	hgyhg	medic - contact	DTMF to Menu	Erez2	DTMF to Menu		
		45456456454	test 2.11.00	Default	ErezDtmf	ErezDtmf	Erez1	Erez2		
		4990	tets2	Default	DTMF to Menu	DTMF to Menu	DTMF to Menu	DTMF to Menu		
		56789	גכעיכע	hgyhg	speech	speech	speech	speech		
	Show	ing 1 to 4 of 4 entries								

- 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.
- 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:**

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

New Outgoing Rule	
■ New Outgoing Rule - Step 1 of 2	
1 R	ule Details 2 Confirm
General Details	
Rule Name*	
Dialed Number Condition	
The number is beetwen*	
and the prefix is +	
Dialed Number Manipulation	
Trim	digits from the number prefix and then
prepand	to the number
	Continue

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:

New Outgoing Rule			
■ New Outgoing Rule - Step 2 of 2			
1 ✓ Rule Details			
Confirm Information			
Rule Name: Dialed Number Condition	99		
The number is beetwen: and the prefix is:	1 - 3 100		
Dialed Number Manipulation			
Trin: prepand:	1 digits from the number prefix and then 2 to the number		
	Back Save Information      ③		

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 7-13:

Me	nu Setting	ŞS						
■ Menu Settings Details     Add New								<b>\$</b> Actions ~
Show 100 v 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		
Show	ving 1 to 5 of 5 entrie	25						< 1 →

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

Figure 7-14: Add New Options

+ Add New ~
✤ New DTMF Menu
✤ New Speech Menu - VOCANom IVR
✤ New Speech Menu - VOCANom Branch

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

Figure 7-15:	New DTMF	Menu	Settings
--------------	----------	------	----------

# **New Menu Settings**

#### General Settings

Menu Name*		
Menu Prompt*	select prompt	•
Menu Dialect*	Hebrew	•
Max Wait Time (0-30 secs)*		
Max Tries (1-7)*		\$
Allow transfer to operator*	None	•
Timeout Prompt	select prompt	•
Attended transfer - No Answer Timeout (0-120 secs)	10	

- **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.
- 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 predefined 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 SMS

Characters: 0/459 Parts: 0/3 Close OK

 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:

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

Figure 7-17: Menu Settings Example

Menu Settings				
≡M	E Menu Settings Details     Add New ✓      C Actions ✓			
Show 100 V entries Search				
	Menu Name	Menu Type 🕴	Script Type	Language \$
	Contacts	Speech	VOCANom	HE-IL
	Default Speech Branch Menu	Speech	VOCABranch	HE-IL
	Default Speech Menu	Speech	VOCANom	HE-IL
	Departments	Speech	VOCANom	HE-IL
	Emp_or_Dep_Menu	Speech	VOCANom	HE-IL
Showing 1 to 5 of 5 entries				

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

New Menu Settings		
General Settings		
Menu Name*		
Dialect*		•
Dictionaries		
First Dictionary*	Contact	•
Second Dictionary*	None	•

- 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	
Prompts Settings			

Play time of day*	None	•
Play selected prompt for company*	None	•
Play short prompt for*	None	•
Play "Gling" at the end of prompt*	None	•
Play the Extension Number*	None	•
Play the Mobile Number*	None	•
Play question prompts with*	Contacts only	•
no. of questions*	3	
Opening Question	Default	•
Second Question	Default	•
Third Question	Default	•
Play Phone Device Type When Transferring*	Always	•

- '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	<b>Device Type</b>
--------------	------------	--------------------

Play Phone Device Type When Transferring\*

Always	
Always	
Only for Multiple Devices	
Never	

- 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

# Additional Settings

Play alias before transfer to department*	Short
Confirm Before Transfer*	All
Allow transfer to mobile phones*	All
Allow transfer to operator*	Employees 💌
Operator extension	

- 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

Call Routing and Hunting - Contact

Routing Settings

Basic routing 👻

Call Routing and Hunting - Department

Routing Settings	Advanced routing -
Prompt Before Transfer*	•
No Answer Timeout (0-120 secs)*	10
hunting type*	main extension first
Hunt on No Answer	0
Hunt on Busy (486)	0
Hunt on Other States (4xx, 5xx, 6xx)	0
Actions When Remote Party is not Reachable	
Action 1 Do nothing	Ŧ

**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	Туре	is	Provided
--------------	---------	-------	------	----	----------

When no Phone Provided (Contac	Type is ts only)	Route	by phone ty	/pe priority a	nd h 🗠
Phone Type	Priority	Office,	Mobile		1
Hunt on No /	Answer	~			
Hunt on Bus	y (486)	$\checkmark$			
Hunt on Other State 57	es (4xx, (x, 6xx)	>			
Actions When Rem	ote Part	y is not R	eachable		
Action 1	Go to n	nenu	$\sim$	Data	

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.

Actions When Remote Party is not Reachable

	Action 1	Do nothing	•
)	Do noth	ing	
)	Play pro	ompt	
,	Go to m	ienu	

• 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

Call Routing and Hunting - Department

Routing Settings	Advanced routing	Ŧ
Prompt Before Transfer*		Ŧ
No Answer Timeout (0-120 secs)*	10	
Hunting type*	Main extension first	Ŧ
Hunt on No Answer		
Hunt on Busy (486)		
Hunt on Other States (4xx, 5xx, 6xx)		
Actions When Remote Party is not Reachable		
Action 1 Do nothing	•	

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' dropdown 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

DIMF	
Collect and route type	Transfer to extension
	The minimum length of extension number 1 AND
	The maximum length of extension number 1
DTMF keys Type	None

• 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	
Collect and route type	None
DTMF keys Type	Second language
DTMF*	1
Behaviour*	Go to menu 💌
Menu Name	Departments

- **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.

Colle	ect and route	e type	Transfer to extension
			The minimum length of extension number 2 AND
			The maximum length of extension number 2 +
DTM	F keys Type		Actions keys routing
Key	Actions		
1	Action 1	Go to menu	Data Default Speech Menu
2	Action 1	Go to Contact	Data Jacob Blackwell (Marketing)
3	Action 1	Do nothing	•
4	Action 1	Do nothing	•
5	Action 1	Do nothing	T
6	Action 1	Do nothing	•
7	Action 1	Do nothing	•
8	Action 1	Do nothing	•
9	Action 1	Do nothing	•
*	Action 1	Do nothing	•
#	Action 1	Do nothing	•

#### Figure 7-27: DTMF Actions

#### Working Hours

Activate Non-Working Hours Behavior

Save Changes		
Save Changes	Carro	
	Save	THE STATE
		 1900

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

#### Working Hours

Activate Non-Working Hours Behavior	$\checkmark$	
Play Unavailable Prompt	None	•
Allow System Use	None	•
Other	Disconnect	•

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	e 7-30:

Me	nu Setting	JS						
≣№	E Menu Settings Details     Add New ✓      CActions ✓							
Shov	v 100 🗸 entri	es					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	HEIL	Failed primary language		
Shov	ving 1 to 5 of 5 entri	25					< 1 >	

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

#### Figure 7-31: Add New Options

- + Add New ~
- ✤ New Speech Menu VOCANom IVR
- + New Speech Menu VOCANom Branch
- 3. Select + New Speech Menu VOCANom Branch; the New Menu Settings screen appears:

Figure 7-32:	New M	enu Settings	- Vo	caNOM	Branch
--------------	-------	--------------	------	-------	--------

New Menu Settings	
General Settings	
Scherdi Settings	
Menu Name*	
Prompts Settings	
Play time of day	
Advertisement	
no. of questions	
Play recognized city before transfer	$\bigcirc$
Additional Settings	
Save callers last choice	
Confirm Before Transfer	
Allow transfer to operator	$\bigcirc$
	Save Changes

- **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:

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



Figure 7-34:

Me	Menu Settings							
	/lenu Settings D	etails					+ Add New ~ 📽 Action	15 ~
Sho	w 100 👻 entri	25					Search:	
	Menu ID 🔺	Menu Name	Menu Type 🛛 🕴	Script Type	Language 🛛 🗍	Status 🍦	Last Compiled Time	$\frac{1}{2}$
	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		
Sho	wing 1 to 5 of 5 entrie	25					۲ (۱	>

- 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:
```

Μ	1enu Settings									
=	Menu	Settings D	etails						🕇 Add New ~	😂 Actions 🗸
sł	now 100	) 🗸 entrie	25					Se	✔ Edit Menu	u
(	Men	nu ID 🔺	Menu Name	Menu Type 🛛 🔶	Script Type	Language 🔶	Status \$	Last C	Recompile     ompile     rime	v
	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	HEIL	Ready			
(	813		Contacts	Speech	VOCANom	HEIL	Ready			
(	815		Departments	Speech	VOCANom	HE-IL	Failed primary language			
Sł	ihowing 1 to 5 of 5 entries									

- 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

#### Menu Settings

≡Me	enu Settings Details		+ Ad	ld New 😂 Actions 🗸	
Show	100 v entries	Searc	∳ E	dit Menu Delete Menu	
	Menu Name	Menu Type 🛛 🔶	Scrtipt Type	$\stackrel{\wedge}{=}$	Language 🔶
	Default Speech Branch Menu	Speech	VOCABranch		HE-IL
	Default Speech Menu	Speech	VOCANom		HE-IL
Showi	ng 1 to 2 of 2 entries				< 1 >

#### 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**.

								🕈 Add New 🗸 🤷
ha	w 100 🗸 entries						Sea	🖋 Edit Menu 🖹 Delete Menu
0	Menu ID	Menu Name	🏦 Menu Type	© Script Type	Language	0 Status	Last Compiled Time	Recompile
2	1823	Default Speech Menu	Speech	VDCANom	HE-IL	Ready	2021-12-05 10:15:31	
	1825	Default Speech Branch Menu	Speech	VDCABranch	HE-IL	Ready	2021-12-05 10:15:37	

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:
- Open the Working Hours Details screen (Configuration > Working Hours); the following screen appears:

#### Figure 7-38: Add Working Hours Set

Wo	rking Hours	
≡W	forking Hours	+ Add New OC Actions >
Show	v 100 • entries	Search:
	Working Hour Set	*
	Default	
	UsaWorkingTime	
Show	ing 1 to 2 of 2 entries	

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

Figure 7-39:	Add Working Hours Set	

New Working Hours			
≡ Working Hours Details			
Name			
Week Day	Start Hour	End Hour	Working Day
Sunday	00:00	00:00	
Monday	00:00	00:00	
Tuesday	00:00 •	00:00	
Wednesday	00:00	00:00	
Thursday	00:00 •	00:00	
Friday	00:00 •	00:00	
Saturday	00:00	00:00	
	Save Changes		

- **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.
- In the following example, we have defined the company's working days as Monday till Friday from 8:00 till 17:00.

Veek Day	Start Hour	End Hour	Working Day
unday	01:00 ▼	01:00 •	
londay	• 00:80	17:00 •	V
uesday	●08:00	17:00 •	$\checkmark$
Vednesday	●08:00	17:00 •	V
hursday	• 08:00	17:00 •	V
riday	• 00:80	17:00 •	V
aturday	01:00 •	01:00 •	

#### Figure 7-40: Edit Working Hours Details

Edit Working Hours

### **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

Working Hours	
≡ Working Hours	+ Add New Of Actions >
Show 100 v entries	🖉 🖉 Edit Working Hours Set
	Delete Working Hours Set
B Working Hour Set	*
🕢 Default	
UsaWorkingTime	
Showing 1 to 2 of 2 entries	< 1 >

#### 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

Wo	rking Hours			
≡ V	forking Hours	+ Add New	<b>o</b> g Actions	~
Sho	N 100 1 entries	🖋 Edit Worki	ng Hours Set	- [
		🖹 Delete Wo	rking Hours S	Set
	Working Hour Set			٠
	Default			
۲	UsaWorkingTime			
Show	ing 1 to 2 of 2 entries		< 1 →	

- 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:

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

Figure 7-43: Events and Holidays

A SERVICE MODE + Baruch-Doc.com	🍯 English 🛛 Welcome Admin@Baruch-Doc.Com 🗸
Events & Holidays	
≡ Event Details	+ Add New
No data available	

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

Figure 7-44: Provide Event Details

New Event			
■ New Event - Step 1 of 2			
1 Ev	ent Details		2 Confirm
Provide Event Details			
Event Title*			
Event Type*	Corporate	•	
Event Start*	<b>#</b>		
Event End*	<b>**</b>		
	Continue 🛞		

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

	-				
	1 Eve	ent Details		2 Confirm	
rovide Event De	etails				
Shac Evene be					
1	Event Title*	Company Fun Day			
E	Event Title*	Company Fun Day	•		
E	Event Title* Event Type*	Company Fun Day Corporate	۲		
E	Event Title* Event Type* Event Start*	Company Fun Day Corporate 01/03/2018	•		
E	Event Title* Event Type* Event Start*	Company Fun Day Corporate 01/03/2018	τ		

Figure 7-45: Provide Event Details Example

4. Click Continue.

Figure 7-46: Confirm Information

New Event	
■ New Event - Step 2 of 2	
1	✓ Event Details 2 Confirm
Confirm Information	
Event Ti	e: Company Fun Day
Event Ty	e: Corporate
Event St	rt: 01/03/2018
Event E	d: 01/03/2018
	Back Save Information

 Click Save Information to confirm your details; "New event successfully created" message appears.

Figure 7-47: Add Event Successfully Updated

റ്	SERVICE MODE • Baruch-Doc.com		👙 Eng	lish Welcome Admin@Baruch-Doc.Com v
Eve	nts & Holidays			System Notification New event successfully created!
≡ Ev	vent Details			+ Add New 0° Actions ~
Shov	e 100 v entries			Search:
	Event Title	Event Type	Event Start 0	Event End 0
	Company fun day	Corporate	01/03/2018	01/03/2018
Show	ing 1 to 1 of 1 entries			< 1 >

## **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

Events & Holidays					
≡ Event Details				+ Add New	<b>0</b> <sup>0</sup> Actions ∽
Show 100 v entries			Sea	<ul> <li>Edit Event</li> <li>Delete Event</li> </ul>	nt
Event Title	Event Type	\$ Event Start	\$ Event End		\$
Company fun day	Corporate	22/08/2021	22/08/2021		
Showing 1 to 1 of 1 entries					< 1 →

3. Select Edit Event.



Edit Event		
≡ Edit Event - Step 1 of 2		
1	Event Details	2 Confirm
Provide Event Details Event Title	• Company Fun Day	
Event Type Event Start	Corporate	
Event End	* 02/03/2018	
	Continue @	

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

Figure 7-50: Confirm Edit Information

Edit Event		
≡ Edit Event - Step 2	of 2	
	1 -1	Event Details 2 Confirm
Confirm Inform	ation	
	Event Title:	Company Fun Day
	Event Type:	Corporate
	Event Start:	01/03/2018
	Event End:	02/03/2018
		⊕ Back Save Information

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

Figure 7-51: Edit Event Successfully Updated

& SERVICE MODE • Baruch-Doc.com			Se English Welcome Adm	n@Baruch-Doc.Com 🗸
Events & Holidays			System Notif Event success	ication fully updated!
			+A00	New 0, Actions ~
Show 100 v entries			Search	
Event Title	* Event Type	Event Start	0 Event End	
Company fun day	Corporate	01/03/2018	01/03/2018	
Showing 1 to 1 of 1 entries				< 1 →

#### **Delete Events and Holidays**

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



A SERVICE MODE + Baruch-Doc.com			🔹 English	Welcome Admin@Baruch-Doc.Com 👻
Events & Holidays				
Event Details				+ Add New CActions -
Show 100 v entries				Edit Event     Beite Event
D Event Title	Event Type	Event Start	Event End	
Company fun day	Corporate	01/03/2018	01/03/2018	
Showing 1 to 1 of 1 entries				< 1 >

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

Figure 7-53: Want to Delete?

Are you sure want to delete the selected	event/s?	
	ОК	Cancel

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

Figure 7-54: Event Successfully Deleted

-	Event successfully deleted!
Events & Holidays	
≡ Event Details	+ Add New
No data available	

## **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

■ New Employee					
	e - Step 1 of 2				
		1 Empl	oyee Details		2 Confirm
Provide Cont	act Datails				
FIOVICE COIL	act Details				
First Name	Last Name	Extension / Office	Mobile		

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



New Employ	/ee				
■ New Employee	- Step 2 of 2				
		1 v Employe	e Details		
Confirm Infor	mation				
Contacts:	Circle Manual		E		
contacts.	First Name	Last Name	Extension / Office	Mobile	
conded.	Peter	Morris	4490	Mobile 012-345678	
condes.	Peter	Last Name Morris	Extension / Office	Моbile 012-345678	

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.

System Settings		
$\equiv$ System Settings - Step 1 of	f2	
	1 System Settings	2 Confirm
System Settings	CLI under 6 is considered an Employee.	
	Continue 🕣	

Figure 7-57: System Settings

3. Click Continue.



System Settings
≡ System Settings - Step 2 of 2
1 v System Settings 2 Confirm
Confirm Information CLI under 6 is considered an Employee.
Save Information ④

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:

lew Call Queue	
Name*	
Description	
Greeting	select prompt 💌
Music on Hold	select prompt 💌
Queue Members*	$\bigcirc \bigcirc$
Routing Type	Round Robin 💌
No Answer Timeout (Sec.)	12
Maximum Calls in Queue	10
When the maximum number of calls is reached	
Action 1 Do nothing	
Maximum Wait Time (Min.)	20
When the maximum wait time is reached	
Action 1 Do nothing	

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).

LDAP Settings		
enabled	Save Changes	

2. Select the 'enabled' check box.

LDAP Settings	
enabled	
LDAP Connection	
Server *	
port *	389
LDAP Version *	Default 👻
User *	
Password *	
baseDN	
Filter Usage	Append to default 👻
Filter	
Encoding	Default 👻
	Check LDAP connection
LDAP User Attributes	objectGUID
Einst Name	ekenName
Last Name	Superior of the second s
Extension	talaphoneMumher
Mobile	mobile
Department	denarment
Email	mail
land and the state	1 Your
days	<ul> <li>✓ Sunday</li> <li>✓ Monday</li> <li>✓ Tuesday</li> <li>✓ Wednesday</li> <li>✓ Thursday</li> <li>□ Friday</li> <li>□ Saturday</li> </ul>
Start time not before	23 0
VocaNOM Connection	
Incremental Mode	
Email Notification	
Send on *	None 👻
	Import Now Save Changes

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.
- From the 'Actions' drop-down list, select Mobile App Invitation; the following screen appears:

Cor	nta	icts								
≡Co	onta	act Deta	ils						+ Add New	<b>©</b> Actions ∽
Shov	v 10	0 ▼ e	ntries					Sei	<ul><li>Activate Co</li><li>Protect Co</li></ul>	ontact ntact
		UID 🔺	First Name	Last Name 🗄	Email $ riangleta$	Department	Extension / Office 🗄	Mobile	Remove Pr	otect
+		004	Mike	Jackson	m@xxx.com	Technical Writing	4410	0548578	O Disable co	
+	•	ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0541234	🖋 Edit Contact	
+		ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	0555666	Delete Cor	itact
(±		BBB	Mike	Jackson	mj@abc.com	Training	1111	0891112	🖬 Mobile App	Invitation
•							🖂 Email In	vitation		
Show	ing 1	to 4 of 4 e	ntries						$_{ m D}$ SMS Inv	itation
						Free Bindir	igs			
					_	🛊 Activate M	obile App			
									🖉 Disable Mo	bile App

Figure 8-1: Mobile App Invitation

5. Select either Email Invitation or SMS Invitation.

Show 100 entries       Extension / Office       Mobile       Image: Constraint of the state of the stat	+ Add New Calculations -
Image: Showing 1 to 1 of 1 entries       Ites Name       Last Name       Email       Department       Extension / Office       Mobile       Mobile	Summary Email
Image: Weight and the state of the	Protect Contact
Showing 1 to 1 of 1 entries	Remove Protect Ø Disable Contact
	<ul> <li>✔ Edit Contact</li> <li>畲 Delete Contact</li> </ul>
	<ul> <li>Mobile App Invitation</li> <li>Email Invitation</li> <li>SMS Invitation</li> <li>Free Bindings</li> </ul>
	Activate Mobile App     Disable Mobile App     App Users Syncs

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.



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

- 3. You are directed to the App Store<sup>™</sup> or Google Play<sup>™</sup>
- 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:





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

#### Figure 8-4: **Downloading VocaNOM from SMS**



- 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

ORANGE	ao ->:-	11:53	- 62% - D
<			
Recei	ved an	invite?	
gidi.adlersbe	rgœaud	locodes.com	
Eorgot passwo	sect2		
	De	wnloading	5
Vocat	om is	downloading nt to your dev	additional vice.

- **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.



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: <u>https://admin.vocanom.com</u>



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.

n Create Shortcut
🕞 🙍 Create Shortcut
What item would you like to create a shortcut for?
This wizard helps you to create shortcuts to local or network programs, files, folders, computers, or Internet addresses.
Type the location of the item:           CALDAP\VocaLdapService\VocaLdapSetup.exe         Browse
Click Next to continue.
Next Cancel

#### 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**.

	0,	
<b>U</b>	VocaNOM Directory Client - Configurator/Monitor	<b>–</b> 🗆 X
Activity for last 24 Hours		Listening
	Minimize Configure Start/Restart Service St	op Service

Figure 9-3: Configurator/Monitor

The following screen appears.

Figure 9-4: Directory Import Configuration

	Directory Import Configurations
Configuration Name	Schedule Enabled
ОК	Add Edit Delete Import Now! Uninstall Service

- 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

	VocaNOM Directory Client Configuration	×
Configuration Name	Voca_LDAP_Sync	
LDAP Connection	LDAP User Attributes File Import Import Schedule VocaNOM Connection Email Notification	ation
Server	10.21.20.108	
Port	389	
LDAP Version	Default V	
User	vocatest\vocauser	
Password	+++++++++++	
BaseDN	DC=Vocatest,DC=local	
Filter	(&(sn=*)(displayName=*)(mail=*)(!givenName=2A*)(!userAccountControl	
FilterUsage	2	
Encoding	Default 🗸	
	, <u></u>	
	OK Cano	el

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: Email:	"department" "mail"	
	Figure 9-6: Directory Client Configuration	
	VocaNOM Directory Client Configuration	×
Configuration Name	AUDC_HE-IL	
✓ Enable		
LDAP Connection	LDAP User Attributes File Import Import Schedule VocaNOM Connection Email Notifica	tion
UniqueID	objectGUID	
FirstName	givenName	
LastName	sn	
Extension	telephoneNumber	
Mobile	mobile	
Dect		
Department	department	
Email	mail	
	Test LDAP	
	OK Cance	el

#### **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).

VocaNOM Directory Clie	ent Configuration
Configuration Name	Voca_LDAP_Sync
🔽 Enable	
LDAP Connection LD	DAP User Attributes File Import Import Schedule VocaNOM Connection Email Notification
VocaNOM Server	http://admin.vocanom.com
Port	80
Ignore Certificates	* Use only for OnPrem with self-signed certificate
User	admin@vocasystem.com
Password	*****
Organization ID	10101
Language	he-il
Incremental mode	

Figure 9-7: VocaNOM Connection

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

Figure 9-8: Directory Import Configurations

Configuration Name	Schedule	Enabled
/oca_LDAP_Sync	At 11:23 PM, every day	True

- 3. Click OK.
- 4. Click Close.

#### **Configuring Files in LDAP Client On-premises Mode**

The following files need to be configured <u>only</u> 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.

Configuration Name	Audiocodes
🖌 Enable	
LDAP Connection	LDAP User Attributes File Import   Import Schedule   VocaNDM Connection   Email Notification
UniqueID	objectGUID
FirstName	givenName
LastName	sn
Extension	telephoneNumber
Mobile	mobile
Department	department
Email	mail
Voca	NOM Ldap Connection Test X
Conn	ection UK!!!

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 Ldap Connection Test	x
Connection ERR!!!!!!!!	
ОК	

### **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

Configuration Name	Schedule	Enabled
Voca_LDAP_Sync	At 11:23 PM, every day	True
		1

- 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.

	6	
	VocaNOM Directory Client Configuration	×
Configuration Name	Audiocodes	
🗹 Enable		
LDAP Connection	LDAP User Attributes File Import Import Schedule VocaNOM Connection Email Notification	5
UniqueID	objectGUID	
FirstName	givenName	
LastName	sn	
Extension	telephoneNumber	
Mobile		
Department		
Email	mail	
Voca	aNOM Ldap Connection Test	
Con	nection FRRIIIIII	
	ОК	1
		1

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 Idap.audiocodes.com 389 telnet 10.10.10.10 389



CAN.	Administrator: Command Prompt		x	
Microsoft Windows [Version (c) 2013 Microsoft Corpora	6.3.9600] tion. All rights reserved.			<u>^</u>
C:\Windows\system32>telnet Connecting To 10.10.10.10. Connect failed	10.10.10.10 389 Could not open connection to the host, on p	port	389:	-
C:\Windows\system32>_				

- 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.

Voca	aNOM Directory Clie	ent Configuration		23
Co	onfiguration Name	Voca_LDAP_Sync		
V	Enable			
Γ	LDAP Connection	AP User Attributes File Import Import 9	ichedule VocaNOM Connection	Email Notification
	VocaNOM Server	http://admin.vocanom.com		
	Port	80		
	Ignore Certificates	* Use only for OnPrem w	ith self-signed certificate	
	User	admin@vocasystem.com		
	Password	*******		
	Organization ID	10101		
	Language	he-il		
	Incremental mode			
			ОК	Cancel

### 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.

VocaNOM Directory Cli	ent Configuration	]
Configuration Name	Voca_LDAP_Sync	
🔽 Enable		
LDAP Connection L	DAP User Attributes File Import Import Schedule VocaNOM Connection Email Notification	
VocaNOM Server	http://admin.vocanom.com	
Port	80	
Ignore Certificates	* Use only for OnPrem with self-signed certificate	
User	admin@vocasystem.com	
Password	******	
Organization ID	10101	
Language	he-il	
Incremental mode		
	OK Cancel	

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

<b>G</b> 4.	Administrator: Command Prompt	_ □	x
Microsoft Windows [Version (c) 2013 Microsoft Corporat	6.3.9600] tion. All rights reserved.		^
C:\Windows\system32>telnet Connecting To admin.vocanor 443: Connect failed	admin.vocanom.com 443 n.comCould not open connection to the hos	st, on	= port
C:\Windows\system32>_			

- 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.

nfiguration Name	Schedule E	nabled
DC_LDAP	At 11:36 PM, every day T	rue

#### Figure 9-17: Directory Import Configurations

The LDAP client service is installed.

Services (Local)			
VocaEnterpriseDirectoryService	Name	Description Status	Startup Type Log On As
. ,	🔍 Virtual Disk	Provides m	Manual Local Syste
Stop the service	🌼 VMware Alias Manager and Ticket Service	Alias Mana Running	Automatic Local Syste
Restart the service	🔍 VMware Snapshot Provider	VMware Sn	Manual Local Syste
	🔍 VMware Tools	Provides su Running	Automatic Local Syste
Description:	😳 Voca Enterprise Directory Service	Enterprise d Running	Automatic Local Syste
Enterprise directory service	🔍 Volume Shadow Copy	Manages an	Manual Local Syste
	🔍 Windows Audio	Manages au	Manual Local Service

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 <u>https://support.microsoft.com/en-us/help/305144/how-to-use-the-useraccountcontrol-flags-to-manipulate-user-account-pro.</u>

## **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:

	VocaNOM Directory Client Configuration
Configuration Name	Audiocodes
🖌 Enable	
LDAP Connection	LDAP User Attributes File Import Import Schedule VocaNOM Connection Email Notification
UniqueID	objectGUID
FirstName	givenName
LastName	sn
Extension	telephoneNumber
Mobile	mobile
Department	department
Email	mail
	Test LDAP
	OK Cancel

Figure 10-1: Default Settings

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

	5
	VocaNOM Directory Client Configuration
Configuration Name	Audiocodes
🗹 Enable	
LDAP Connection	LDAP User Attributes File Import Import Schedule VocaNOM Connection Email Notification
UniqueID	objectGUID
FirstName	givenName
LastName	sn
Extension	msRTCSIP
Mobile	mobile
Department	department
Email	mail
	Test LDAP
	OK Cancel

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.
- 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.
- Define dialed phone number manipulation rules (only if required) see Managing Outgoing Rules on page 128.

For more information, see Configuration on page 123.

This page is intentionally left blank.

### **International Headquarters**

1 Hayarden Street,

Airport City

Lod 7019900, Israel

Tel: +972-3-976-4000

Fax: +972-3-976-4040

AudioCodes Inc.

200 Cottontail Lane

Suite A101E

Somerset NJ 08873

Tel: +1-732-469-0880

Fax: +1-732-469-2298

Contact us: <a href="https://www.audiocodes.com/corporate/offices-worldwide">https://www.audiocodes.com/corporate/offices-worldwide</a> Website: <a href="https://www.audiocodes.com/">https://www.audiocodes.com/</a> Documentation Feedback: <a href="https://online.audiocodes.com/documentation-feedback">https://online.audiocodes.com/</a> peedback

©2022 AudioCodes Ltd. All rights reserved. AudioCodes, AC, HD VoIP, HD VoIP Sounds Better, IPmedia, Mediant, MediaPack, What's Inside Matters, OSN, SmartTAP, User Management Pack, VMAS, VoIPerfect, VoIPerfectHD, Your Gateway To VoIP, 3GX, VocaNom, AudioCodes One Voice, AudioCodes Meeting Insights, AudioCodes Room Experience and CloudBond are trademarks or registered trademarks of AudioCodes Limited. All other products or trademarks are property of their respective owners. Product specifications are subject to change without notice.

Document #: LTRT-28839

