

Voca Agile Conversational IVR

Version 8.0



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Related Documentation

Document Name
Voca Release Notes
Voca Installation Manual

Document Revision Record

LTRT	Description
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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	4
	Using On-premises	5
	Changing your Password	6
	Getting Familiar with the GUI	7
	Menu Options	7
	Dashboard	8
	Logging Out	9
	Getting Help	10
3	Managing Contacts	11
	Contact Details Actions	11
	Adding a Contact	11
	Editing a Contact	13
	Creating an Alias for a Contact	15
	Deleting a Contact	19
	Searching a Contact	20
	Protecting a Contact	20
	Removing Protection from a Contact	21
	Activating a Contact	22
	Disabling a Contact	23
	Activating a Contact to use the VocaNOM Mobile App	24
	Importing/Exporting Contact List	26
	Importing Contact Information	27
	Exporting Contact Information	30
	Freeing Bindings	31
4	Managing Contacts Departments	32
	Adding an Alias	32
	Editing an Alias	34
	Deleting an Alias	36
	Removing a Department Name from the Recognition List	38
	Setting the Primary Alias	38
	Using Prompts for an Alias	39
	Deleting a Department with No Contacts	40
	Importing a Package	41

Importing Contacts Department	46
Using the Dictionary List	47
Adding Department Dictionary	47
Editing Department Dictionary	48
Deleting Department Dictionary	49
Adding a Department Manually	49
Disabling a Department	51
Activating a Department	52
Editing a Department	53
Setting Actions for a Department	55
Non-Working Hours Behavior for a Department	58
Configuring Department Prompts	62
Creating an Alias for a Department	65
Aliases to Departments Mapping	68
Searching for an Alias	70
Deleting a Department	71
Searching a Department	71
Importing/Exporting Department List	72
Importing Department Information	72
Exporting Department Information	75
5 Managing Branches	76
Adding a Branch	76
Editing a Branch	77
Mapping a City to a Branch	79
Configuring Branch Prompts	84
Creating an Alias for a Branch	86
Mapping Unmapped Cities to Branches	88
Mapping Cities Automatically to a Branch	89
Mapping Cities Manually to Branches	91
Deleting a Branch	92
Managing Overlapping Branches	93
Importing/Exporting Branch List	94
Importing Branch Information	94
Exporting Branch Information	96
6 Producing Reports	98
IVR Reports	98
Overall Performance Report	98
Drill-down Report	101
Call Date Report	104
Call Hour Report	107
Requested Contacts Report	109
Requested Departments Report	111
Other Reports	113

Branch Reports	113
Branches by Date Report	113
Field Chooser	114
Requested Destination by Date Report	115
App Reports	116
Overall Performance Report	117
Drill-down Report	119
Action Date Report	121
Action Hour Report	123
Action Usage Report	125
7 Configuration	127
Adding a Voice Prompt	127
Configuring Flow Settings	129
Adding a Flow Setting	130
Editing a Flow Setting	131
Deleting a Flow Setting	132
Managing Outgoing Rules	132
Configuring Menu Settings	134
Adding a Speech Menu	134
Adding a VocaNOM IVR Speech Menu	134
Adding a VocaNOM Branch Speech Menu	142
Adding a DTMF Menu	143
Editing Menu Settings	146
Deleting Menu Settings	146
Defining Working Hours	147
Adding Working Hour Set	147
Editing Working Hour Set	148
Deleting Working Hours Set	149
Defining Events and Holidays	149
Adding Events and Holidays	149
Editing Events and Holidays	151
Delete Events and Holidays	152
Defining Additional Employees	153
Configuring System Settings	154
Configuring LDAP Settings	155
8 Sending a VocaNOM App Invitation	159
Downloading VocaNOM App from Email Invitation	160
Downloading VocaNOM App from SMS Invitation	161
9 Configuring Voca LDAP Synchronization	165
LDAP Client Requirements	165
Hardware and Operating System Requirements	165
Network Requirements	165
LDAP Synchronization Requirements	165

Running the LDAP Client Setup in Voca Cloud	165
Configuring the LDAP Client	166
Setting up LDAP Client Synchronization	166
Entering Fields under LDAP Connection Tab	167
Entering Fields under LDAP User Attributes Tab	168
Entering Fields Under VocaNOM Connection Tab	169
Configuring Files in LDAP Client On-premises Mode	171
Testing LDAP Client Connectivity	171
LDAP Server Connectivity Testing	171
VocaNOM Server Connectivity Testing	172
Troubleshooting LDAP Client Connectivity	173
Troubleshooting Customer's LDAP Server	173
LDAP Client Does not Connect to the VocaNOM Server	175
Error [Run] [LDAP import] edmws exception:Value Cannot be Null	176
Installing LDAP Client Service	177
10 Improving LDAP Synchronization	178
Basic LDAP Filters	178
Advanced LDAP Filters	178
LDAP User Attributes	179
11 Use Cases	181
Inviting a New Contact to VocaNOM App	181
Adding a New Branch and Advanced Features	181
Configuring Flows, Voice Prompts and Menus	181

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:

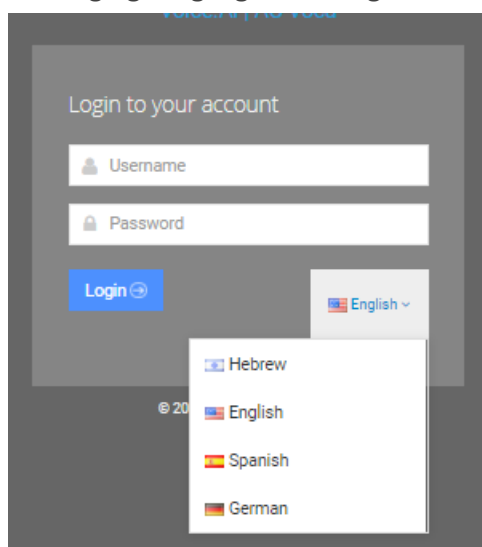
- English
- Spanish
- German
- Hebrew

Languages can be changed from the Login screen and from the main menu.

➤ **To change the language from the Login screen:**

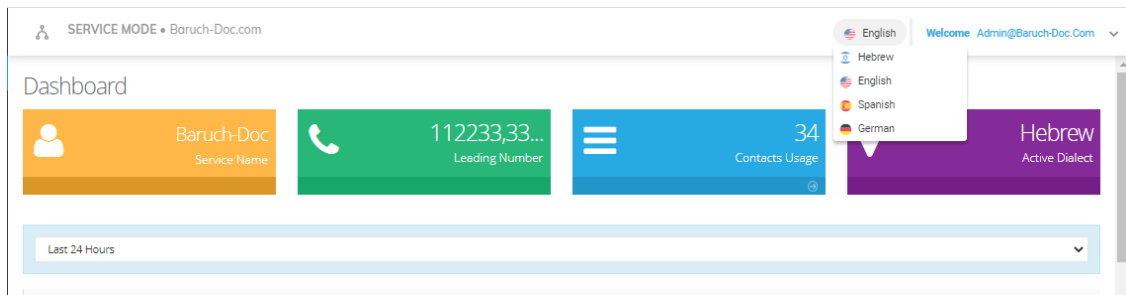
- Hover the cursor over the language button, and then select the desired language.

Figure 2-1: Changing Language from Login Screen



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

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

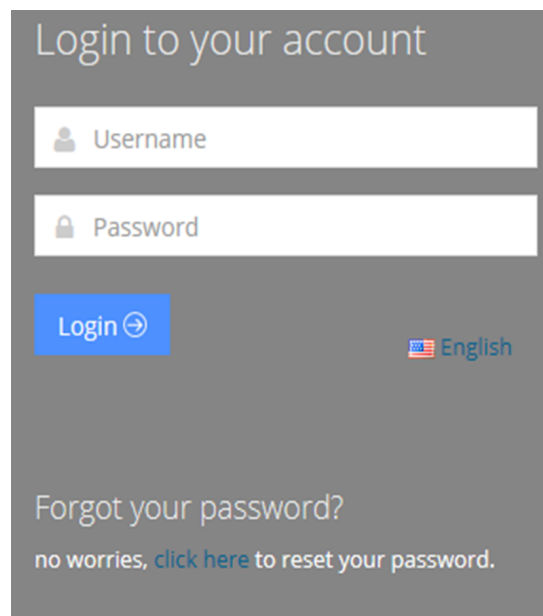
Figure 2-2: Changing Language from Main Menu

Using Cloud

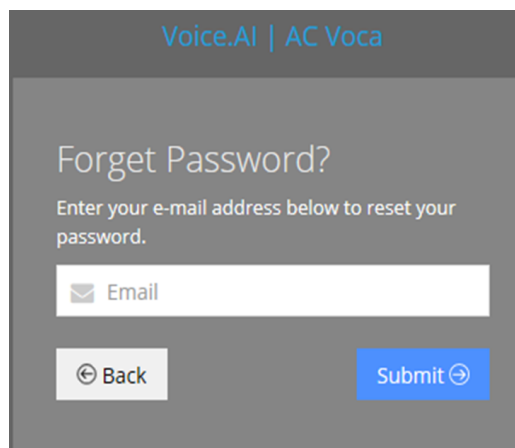
The procedure below describes how to log in to Voca using the cloud software.

➤ To log in to Voca using the Cloud:

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

Figure 2-3: Login

2. Enter the Username (previously sent to the customer email) and Password (that the customer defined) and click Login; the customer Dashboard appears (see [Getting Familiar with the GUI](#) on page 7).
3. If you forget your password, click on the 'click here' link on the login screen; the following screen appears.

Figure 2-4: Forget Password

The screenshot shows a web form titled "Voice.AI | AC Voca" at the top. Below the header, the text "Forget Password?" is displayed, followed by the instruction "Enter your e-mail address below to reset your password." There is a text input field with a mail icon and the placeholder text "Email". At the bottom of the form, there are two buttons: a "Back" button with a left arrow icon and a "Submit" button with a right arrow icon.

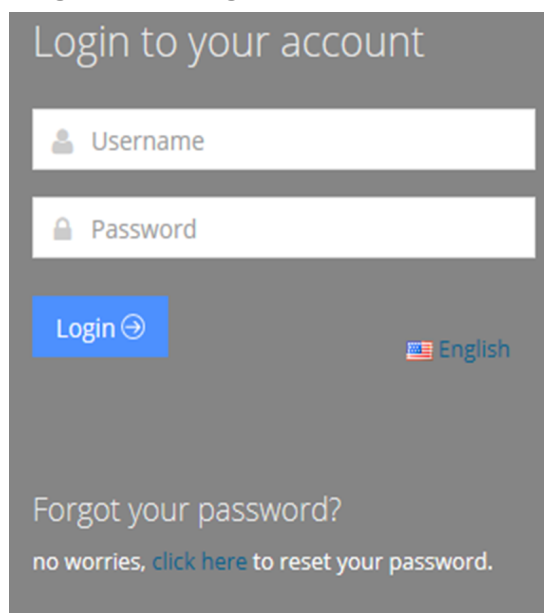
4. Enter your email address to receive a new password, and then click **Submit**.

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 2-5: Login

The screenshot shows a web form titled "Login to your account". It features two input fields: "Username" with a person icon and "Password" with a lock icon. Below these fields is a blue "Login" button with a right arrow icon. To the right of the button is a language selector showing a US flag and the word "English". At the bottom of the form, there is a link for "Forgot your password?" with the text "no worries, [click here](#) to reset your password."



- 'Forgot your password?' is not supported in the On-premises version.
- Version number is available when hovering on the Copyright line on the Web Management Login screen.

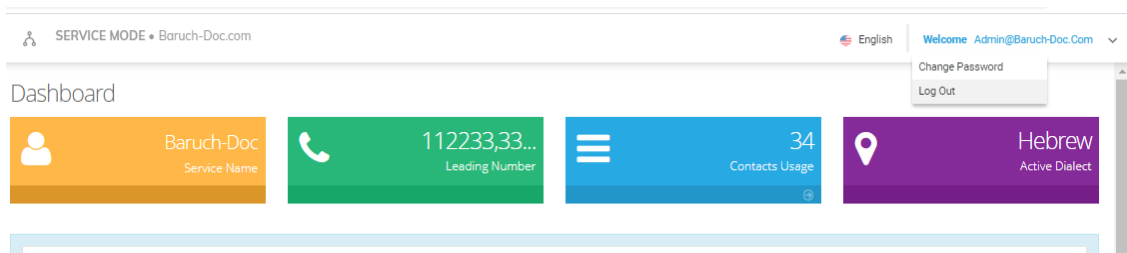
Changing your Password

The procedure below describes how to change the login password.

➤ To change the login password:

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

Figure 2-6: Dashboard with Change Password



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

Figure 2-7: Change Password

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

Getting Familiar with the GUI

Figure 2-8: Dashboard

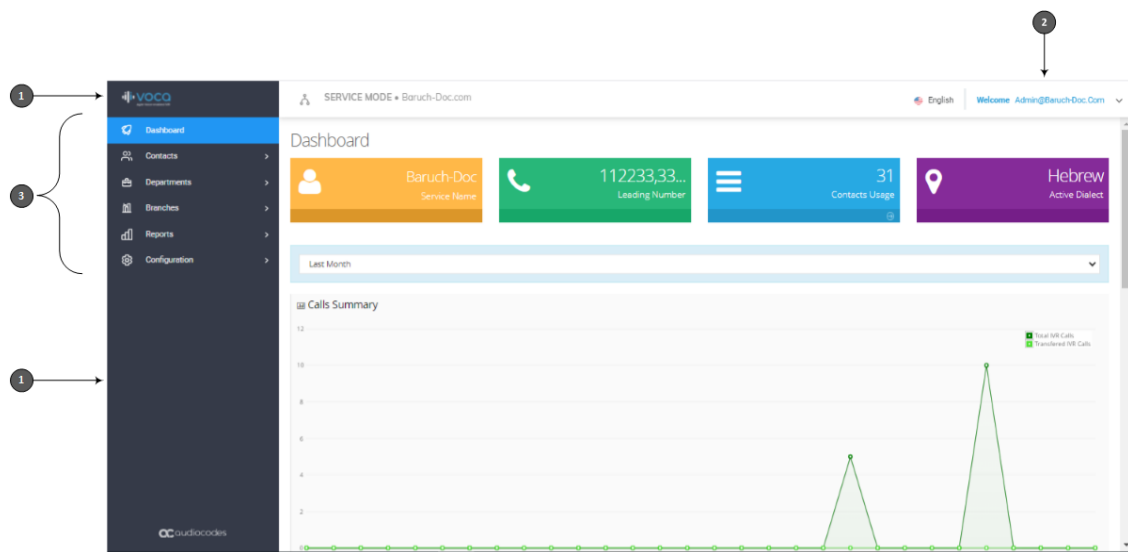


Table 2-1: Toolbar

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

Menu Options

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

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

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

Dashboard

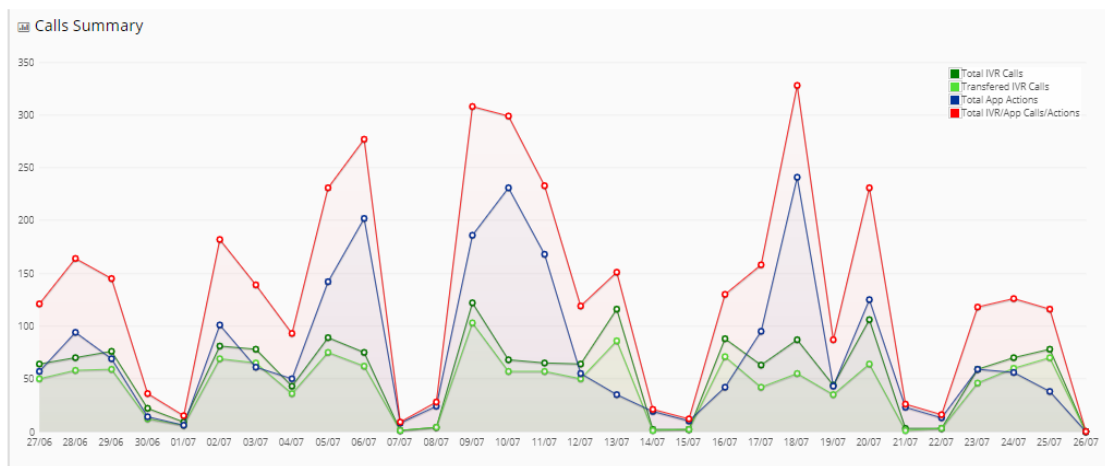
The following Dashboard titles appear in the colored boxes:

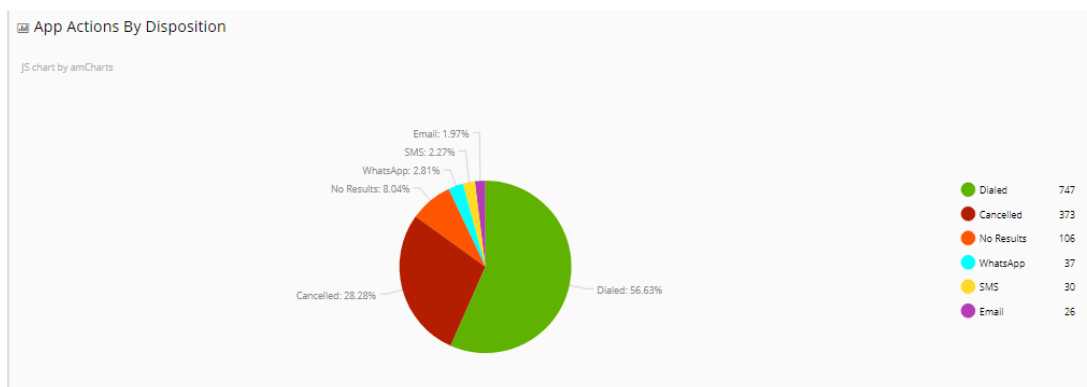
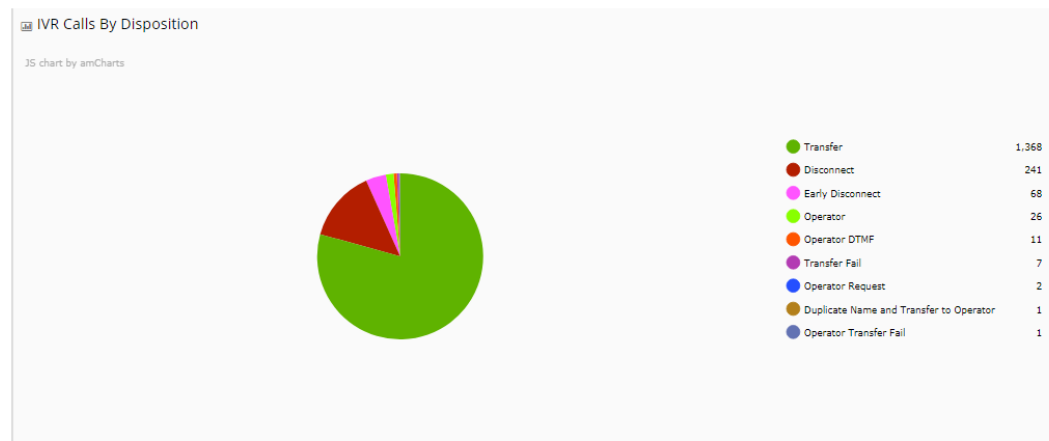
- Customer Name - Displays the Customer or Company name
- Leading Number - Displays the access numbers to the Voca service.
- Contacts Usage – Displays the number of users, departments and branches imported into Voca.
- Active Dialect – Displays the main supported language.

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

- Last 24 hours
- Last week
- Last month

Figure 2-9: Graphical Summaries





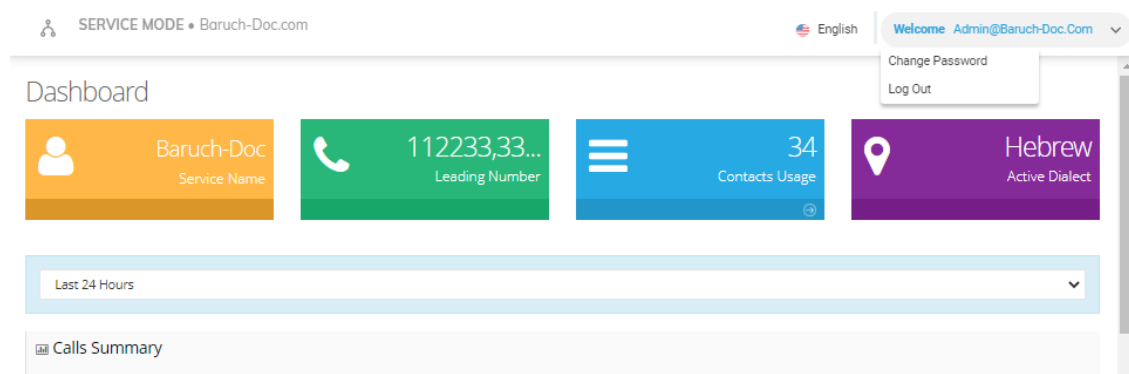
Logging Out

The procedure below describes how to log out from Voca.

➤ To log out from Voca:

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

Figure 2-10: Dashboard with Log Out



2. Select **Log Out**.

Getting Help

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

3 Managing Contacts

One of VocaNOM's capabilities is to route calls to contacts by saying the contact 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 155.

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

≡ Contact Details

+ Add New

⚙ Actions

Show

100

 entries

Search

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

Showing 1 to 6 of 6 entries

<

1

>

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

Figure 3-2: New Contact

New Contact

≡ New Contact - Step 1 of 2

1 Contact Details 2 Confirm

For each contact please enter their first and last name, and at least one contact number.

Provide Contact Details

UID	First Name	Last Name	Department	Email
Extension / Office	Mobile	DECT		

+ More Contacts

Continue

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 ✓ Contact Details

2 Confirm

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.

Confirm Information

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

≡ Contact Details

Show 100 entries

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	
<input checked="" type="checkbox"/>	010	Jim	Barnes	jimb@gmail.com	Cardiovascular	1457	5455454	
<input type="checkbox"/>	020	Spiros	Salama	spal@mail.com	Obstetrics	2406	0254575	
<input type="checkbox"/>	1	David	Goldberg		Consumer Sales	1111		
<input type="checkbox"/>	2	Felix	Abram		Enterprise Sales	2222		
<input type="checkbox"/>	3	Jacob	Blackwell		Marketing	3333		active
<input type="checkbox"/>	4	John	Webber		Finance	4444		active
<input type="checkbox"/>	5	Mark	Tyson		Line 1	5555		active
<input type="checkbox"/>	8888	ליאור	דובל		מרכז	4444		active

Showing 1 to 8 of 8 entries

+ Add New ⚙ Actions ▾
 Import Contacts List
 Export Contacts List
 Activate Contact
 Protect Contact
 Remove Protect
 Disable Contact
 Edit Contact
 Delete Contact

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

Figure 3-5: Edit Contact Step 1

≡ Edit Contact - Step 1 of 2

1 Contact Details 2 Confirm

First Name* Jim

Last Name* Barnes

Department Cardiovascular

Email JimB@gmail.com

Extension / Office 1457

Mobile 545545455

Aliases for the client

+ More Aliases

Continue ➔

4. Make your changes on the 'Edit Contact' screen, and then click **Continue**.

Figure 3-6: Edit Contact Step 2

Edit Contact

≡ Edit Contact - Step 1 of 2

1 Contact Details 2 Confirm

First Name* Jim

Last Name* Barnes

Department Cardiovascular

Email JimB@gmail.com

Extension / Office 1458

Mobile 545545450

Aliases for the client

+ More Aliases

Continue ➔

5. Click **Save Changes**; the updated Contact details appear.

Figure 3-7: Edited Contact

Contacts

System Notification
Contact successfully updated!

+ Add New

Actions

Contact Details

Show 100 entries

Search:

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	Status
<input type="checkbox"/>	010	Jim	Barnes	jimb@gmail.com	Cardiovascular	1457	545545455	active
<input type="checkbox"/>	020	Spiros	Salama	spal@mail.com	Obstetrics	2406	02545799	active
<input type="checkbox"/>	1	David	Goldberg		Consumer Sales	1111		active
<input type="checkbox"/>	2	Felix	Abram		Enterprise Sales	2222		active
<input type="checkbox"/>	3	Jacob	Blackwell		Marketing	3333		active
<input type="checkbox"/>	4	John	Webber		Finance	4444		active
<input type="checkbox"/>	5	Mark	Tyson		Line 1	5555		active
<input type="checkbox"/>	8888	יונה	גורן		breco	4444		active

Showing 1 to 8 of 8 entries

<

1

>

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 3-8: Adding a Contact Alias

1 Contact 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 3-9: Adding a Contact Alias – First Name

Edit Contact

≡ Edit Contact - Step 1 of 2

1 Contact 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

+ More Aliases

Continue

7. The following screen appears.

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

≡ Edit Contact - Step 1 of 2

1 Contact 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

+ More Aliases

Continue

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

Figure 3-11: Adding a Contact Alias – More Aliases

1 Contact 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	–
Daveed	First Name	–

+ More Aliases

Continue

You can remove an alias by clicking the red “–” icon.

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

Figure 3-12: Adding a Contact Alias – Save Changes

Edit Contact - Step 2 of 2

1 ✓ Contact Details 2 Confirm

Confirm Information

General

First Name: David

Last Name: Moby

Department: Finance

Email: DM@dmoby.com

Extension / Office: 3600

Mobile: 05555555555

DECT: 212222

Customer: 10097

Aliases

Dave	First Name
Daveed	First Name

Back Save Changes

10. Click **Save Changes**.

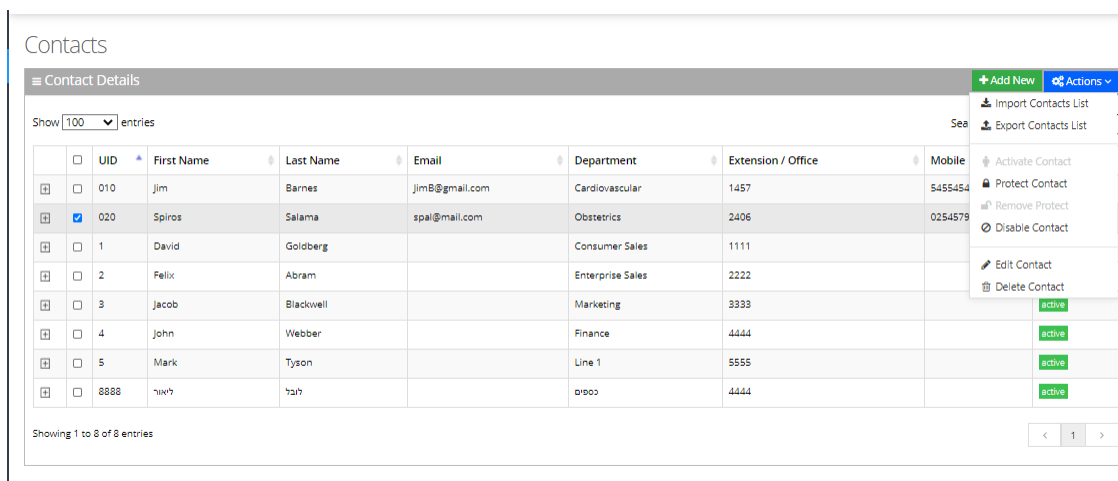
Deleting a Contact

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 3-13: Delete a Contact



- The following message appears: "Are you sure you want to delete the selected contact (s)?"
- 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:

- Open the Contacts menu (Contacts > <department Dictionary name>).
- Click on the Contact List menu.
- 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:

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

Figure 3-14: Protect a Contact

Contacts

≡ Contact Details + Add New Actions

Show 100 entries

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App
<input checked="" type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active
<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not
<input type="checkbox"/>	987	Bob	Jane	abc@gmail.com	Finance	4999	5012345678		active	not
<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665358		active	active
<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active	active
<input type="checkbox"/>	888	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active

Showing 1 to 7 of 7 entries

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

Figure 3-15: Protected Contact

Contacts

≡ Contact Details + Add New Actions

Show 100 entries

Search:

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
<input checked="" type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		protected	active	
<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not activated	
<input type="checkbox"/>	987	Bob	Jane	abc@gmail.com	Finance	4999	5012345678		active	not activated	
<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665358		active	active	
<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active	active	
<input type="checkbox"/>	888	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	

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 3-16: Remove Protected Contact

Contacts

≡ Contact Details

Show 100 entries

	<input type="checkbox"/>	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status
	<input checked="" type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		protected
	<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active
	<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active
	<input type="checkbox"/>	987	Bob	Jane	abc@gmail.com	Finance	4999	5012345678		active
	<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665358		active
	<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active
	<input type="checkbox"/>	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active

Showing 1 to 7 of 7 entries

Actions:

- Activate Contact
- Protect Contact
- Remove Protect
- Disable Contact
- Edit Contact
- Delete Contact
- Mobile App Invitation
- Free Bindings
- Activate Mobile App
- Disable Mobile App

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

Figure 3-17: Removed Protected Contact

Contacts

≡ Contact Details

Show 100 entries

	<input type="checkbox"/>	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
	<input checked="" type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active	
	<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
	<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not activated	
	<input type="checkbox"/>	987	Bob	Jane	abc@gmail.com	Finance	4999	5012345678		active	not activated	
	<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665358		active	active	
	<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active	active	
	<input type="checkbox"/>	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	

Showing 1 to 7 of 7 entries

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 3-18: Activating a Contact

Contacts

≡ Contact Details

Show 100 entries

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status
<input type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active
<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active
<input type="checkbox"/>	987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active
<input checked="" type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665358		disabled
<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active
<input type="checkbox"/>	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active

Showing 1 to 7 of 7 entries

Actions: Add New, Activate Contact, Protect Contact, Remove Protect, Disable Contact, Edit Contact, Delete Contact, Mobile App Invitation, Free Bindings, Activate Mobile App, Disable Mobile App

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

Figure 3-19: Activated Contact

Contacts

≡ Contact Details

Show 100 entries

Search:

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
<input type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active	
<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not activated	
<input type="checkbox"/>	987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active	not activated	
<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	054566532232		active	active	
<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active	active	
<input type="checkbox"/>	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active	active	

Showing 1 to 7 of 7 entries

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 3-20: Disabling a Contact

Contacts

≡ Contact Details

Show 100 entries

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status
<input type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active
<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active
<input type="checkbox"/>	987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active
<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665232232		active
<input checked="" type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	0555666666666		active
<input type="checkbox"/>	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active

Showing 1 to 7 of 7 entries

Actions:

- Activate Contact
- Protect Contact
- Remove Protect
- Disable Contact
- Edit Contact
- Delete Contact
- Mobile App Invitation
- Free Bindings
- Activate Mobile App
- Disable Mobile App

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

Figure 3-21: Disabled Contact

Contacts

≡ Contact Details

Show 100 entries

	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status
<input type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active
<input type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active
<input type="checkbox"/>	987	Bob	jane	abc@gmail.com	Finance	4999	5012345678		active
<input type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665232232		active
<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	0555666666666		disabled
<input type="checkbox"/>	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 3-22: Activate Contact – Mobile App

Contacts

Contact Details										+ Add New ⚙ Actions	
Show 100 entries										Activate Contact Protect Contact Remove Protect Disable Contact Edit Contact Delete Contact Mobile App Invitation Free Bindings Activate Mobile App Enterprise Private Enterprise & Private Disable Mobile App	
	UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status		
<input type="checkbox"/>	004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active		
<input checked="" type="checkbox"/>	18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active		
<input type="checkbox"/>	19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active		
<input type="checkbox"/>	987	Bob	Jane	abc@gmail.com	Finance	4999	5012345678		active		
<input checked="" type="checkbox"/>	ABC123	John	Smith	John.Smith@vocom.com	Finance	5000	0545665232232		active		
<input type="checkbox"/>	ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active		
<input checked="" type="checkbox"/>	BBB	Mike	Jackson	mj@abc.com	Training	1111	089111222		active		

Showing 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.

Figure 3-23: System Notification

System Notification
User john.smith@vocanom.com was activated successfully

Contacts

Mobile App Activation Progress

Show 100 entries

UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active	
18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not activated	
987	Bob	Jane	abc@gmail.com	Finance	4999	5012345678		active	not activated	
ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665232232		active	active	
ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active	active	
BBB	Mike	Jackson	my@abc.com	Training	1111	089111222		active	active	

Showing 1 to 7 of 7 entries



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

Figure 3-24: Contacts with No Email Address – NA

Contacts

Mobile App Activation Progress

Show 100 entries

UID	First Name	Last Name	Email	Department	Extension / Office	Mobile	DECT	Status	App Status	Last SMS
004	Mike	Jackson	m@xxx.com	Technical Writing	4410	05485787787		active	active	
18	Bob	Martin	bm@finance.com	Finance	3242	00299887766	103406	active	not activated	
19	David	Moby	DM@dmoby.com	Finance	3600	05555555555	212222	active	not activated	
987	Bob	Jane		Finance	4999	5012345678		active	NA	
ABC123	John	Smith	John.Smith@vocanom.com	Finance	5000	0545665232232		active	active	
ABC456	Greg	Kashmir	Greg.kashmir1@gmail.com	Admin	4490	05556666666		active	active	
BBB	Mike	Jackson		Training	1111	089111222		active	NA	

Showing 1 to 7 of 7 entries

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 3-25: Contact Details

UID	First Name	Last Name	Email	Department	Extension / Office	Mobile
1	nutan222	koren	test@voca.com	marketing	0543080340	0523741571
20003	Mari	zverev	jasdgash@chjash.com			546765239
20004	Chana	Zieda				546765238
20006	Riki	Zuraker				
20008	Rochama	Zur				
20009	David	Zur				
20010	Zahava	Zur				
20011	Lion	Zukerman				
20012	Yosef	Zugrabo				
20013	Shulamit	Zubery				546765237
20014	Jek	Zueli				
20015	Yhodit	Zueli				

Figure 3-26: Import/Export Contact List

Import/Export

Import Contacts List

☐ Incremental Mode

Encoding: UTF-8

Choose File No file chosen

Import CSV

This feature allows you to synchronize 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 delimited and saved in UTF-8 encoded format.

Export Contacts List

☒ Export Active and Inactive Contacts List

☐ Export Active Contacts List

☐ Export Inactive Contacts List

Export CSV



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**.

 Import Contacts List 

Import your contacts list from **CSV** or **Excel** 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](#)


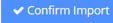
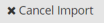
Both files must be save in UTF-8 encoded format.

Cancel Import Contacts List

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

Figure 3-27: Pre-Import Report

Pre-Import Report

Pre-Import Details		
Notice: The system is currently pending for action		
Status	Records	Preview
New Entity	52	
Items that will be enabled (Already Exist)	0	
Update	0	
No Change	0	
Items to be disabled	0	
<div>   </div>		

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



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

Figure 3-28: Update Pre-Import Report

Pre-Import Report

Pre-Import Details

Notice: The system is currently waiting for action

Status	Records	Preview
New Entity	0	
Items that will be enabled (Already Exist)	0	
Update	2	
No Change	12645	
Items to be disabled	0	

Update

Show 25 entries

Search

First Name	Last Name	Department	Extension / Office	Mobile	Email
Jörn	Schmaljohann	A	1111	053741571	jschmaljohann@ukaachen.de
Jörn	Schmaljohann	A	1111	2222	jschmaljohann@ukaachen.de
Marlies	Dorloechter	A	1111	0523741571	Marlies.Dorloechter@dlr.de
Marlies	Dorloechter	A	1111	2222	Marlies.Dorloechter@dlr.de

Showing 1 to 4 of 4 entries

<

1

>

Confirm Import

Cancel Import



The same behavior applies for Contacts that have been disabled.

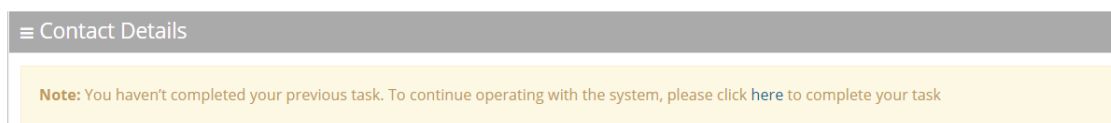
- Click **Confirm Import** to import the contacts. If you wish to cancel the import process, click **Cancel Import**.



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



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.

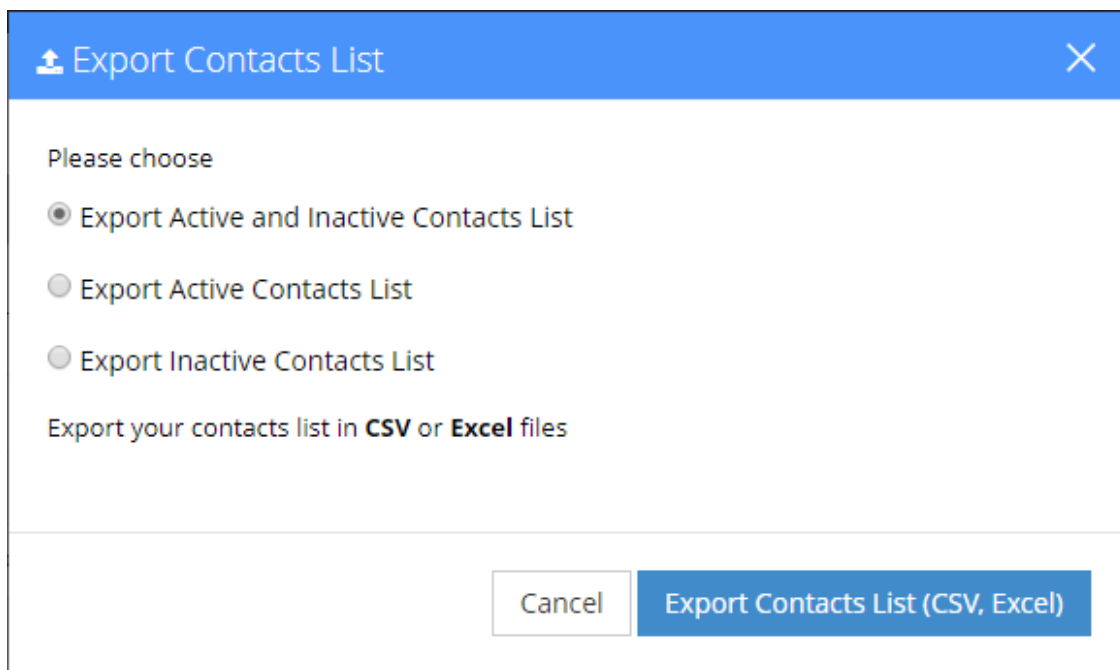
Exporting Contact Information

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

Please choose

- ☒ Export Active and Inactive Contacts List
- ☐ Export Active Contacts List
- ☐ Export Inactive Contacts List

Export your contacts list in **CSV** or **Excel** files

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".

Figure 4-1: Tenant Configuration Example

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: Germany (49)

System Dialect: German

Auto Attendant Name Recognition Order for Enterprise Contacts: First name – Last name

Timezone*

Hide CLI

Allow External CDR Reports

Concurrent channel licenses*: 20

Available licenses: 1531

First name – Last name

(First name – Last name) and (Last name – First name)

First name and (First name – Last name)

First and (First – Last) and (Last – First)

Last name – Department name

(Last name – Department name) and (First name – Department name)

(Last name – Department name) and (Department name – Last name)

(Last name – Department name) and (Department name – Last name) and (First name – Last name – Department name)

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

≡ Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show 25 entries Search: Delete unused departments

<input type="checkbox"/> Aliases	Department Name	Prompt	Actions
<input type="checkbox"/>	cardiovascular		
<input type="checkbox"/>	consumer sales		
<input type="checkbox"/>	enterprise sales		
<input type="checkbox"/>	finance		
<input type="checkbox"/>	line 1		
<input type="checkbox"/>	management		
<input type="checkbox"/>	marketing		
<input type="checkbox"/>	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

Contacts Departments

≡ Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show entries Search Delete unused departments

Aliases	Department Name	Prompt	Actions
	cardiovascular	🔊	
	consumer sales	🔊	
<div> <div> <p>Aliases</p> <p>consumer sales <input checked="" type="radio"/> Primary Recognize <input checked="" type="checkbox"/></p> <p>sales <input type="radio"/> Primary</p> </div> <div> <p>Prompts</p> <p>File Options + <input checked="" type="radio"/> Default <input type="radio"/> Upload <input type="radio"/> Record</p> <p>Cancel Save</p> </div> </div>			
	enterprise sales	🔊	
	finance	🔊	
	line 1	🔊	
	management	🔊	🗑️
	marketing	🔊	
	obstetrics	🔊	

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

Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show 100 entries Search: Delete unused departments

<input type="checkbox"/> Aliases	Department Name	Prompt	Actions
<input type="checkbox"/>	cardiovascular		
<input type="checkbox"/>	consumer sales		
<input type="checkbox"/>	enterprise sales		
<input type="checkbox"/>	finance		
<input type="checkbox"/>	line 1		
<input type="checkbox"/>	management		
<input type="checkbox"/>	marketing		
<input type="checkbox"/>	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.

Contacts Departments

1. Select ASP

Medical - EN-US Save

2. Departments

Show 100 entries Search: Delete unused departments

<input type="checkbox"/> Aliases	Department Name	Prompt	Actions
<input type="checkbox"/>	cardiovascular		
<input type="checkbox"/>	consumer sales		
<input type="checkbox"/>	enterprise sales		
<input type="checkbox"/>	finance		
<input type="checkbox"/>	line 1		
<input type="checkbox"/>	management		
<input type="checkbox"/>	marketing		
<input type="checkbox"/>	obstetrics		

Aliases: Primary Recognize File Options* Default Upload Record Cancel Save

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

Figure 4-5: Contacts Departments – Editing Alias

The screenshot shows the 'Contacts Departments' interface. At the top, there's a '1. Select ASP' section with a dropdown menu set to 'Medical - EN-US' and a 'Save' button. Below this is the '2. Departments' section, which includes a 'Show 100 entries' dropdown and a search bar. A table lists departments: 'cardiovascular', 'consumer sales', 'enterprise sales', 'finance', 'line 1', 'management', 'marketing', and 'obstetrics'. An 'Aliases' section is open, showing a list of aliases. The 'sales' alias is highlighted with a red box. To its right, there's a 'Primary' radio button and a 'Recognize' toggle switch. A blue arrow points to the edit icon (pencil) next to the 'sales' alias. Below the aliases, there's a 'Prompts' section with 'File Options' and radio buttons for 'Default', 'Upload', and 'Record'. At the bottom right, there are 'Cancel' and 'Save' buttons.

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 Save

2. Departments

Show 100 entries Search: Delete unused departments

<input type="checkbox"/> Aliases	Department Name	Prompt	Actions
<input type="checkbox"/>	cardiovascular		
<input type="checkbox"/>	consumer sales		
<input type="checkbox"/>	enterprise sales		
<input type="checkbox"/>	finance		
<input type="checkbox"/>	line 1		
<input type="checkbox"/>	management		
<input type="checkbox"/>	marketing		
<input type="checkbox"/>	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. Place your cursor over the alias that you wish to delete, and then click the x icon. The alias is deleted.

≡ Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show 100 entries

<input type="checkbox"/> Aliases	Department Name
<input type="checkbox"/>	cardiovascular
<input type="checkbox"/>	consumer sales
<input type="checkbox"/>	enterprise sales
<input type="checkbox"/>	finance
<input type="checkbox"/>	line 1
<input type="checkbox"/>	management
<input type="checkbox"/>	marketing

Aliases

consumer sales Primary Recognize

sales Primary X

Prompts

File Options: ☒ Default ☐ Upload ☐ Record

Cancel Save

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 the on the line of the department name.

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

The screenshot shows the 'Contacts Departments' page. At the top, there's a '1. Select ASP' section with a dropdown menu set to 'Medical - EN-US' and a 'Save' button. Below this is the '2. Departments' section. It includes a 'Show 100 entries' dropdown and a search bar. A table lists department names: 'cardiovascular' and 'consumer sales'. A modal window is open over 'consumer sales', showing an 'Aliases' list with 'consumer sales' as the primary alias and 'sales' as a secondary alias. The 'Recognize' toggle for 'sales' is currently turned on. To the right of the modal is a 'Prompts' section with 'File Options' set to 'Default'. At the bottom right of the modal are 'Cancel' and 'Save' buttons.

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

Setting the Primary Alias

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

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

Figure 4-8: Primary Example

The screenshot shows the 'Contacts Departments' interface. At the top, there's a header 'Contacts Departments' and a sub-header 'Contacts Departments'. Below this, there's a section '1. Select ASP' with a dropdown menu set to 'Medical - EN-US' and a 'Save' button. The next section is '2. Departments', which includes a 'Show 100 entries' dropdown and a 'Search' input field. A table lists departments: 'cardiovascular' and 'consumer sales'. Below the table, there's a section for 'Aliases' with a table showing 'consumer sales' and 'sales' as aliases for 'Primary'. To the right of the aliases table is a 'Prompts' section with 'File Options' and radio buttons for 'Default', 'Upload', and 'Record'. The 'Default' option is selected. At the bottom right, there are 'Cancel' and 'Save' buttons.

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 your own Prompts. The procedure below describes how to configure the Department Contacts audio prompt for the Voca service. You can use an existing default prompt (Primary), upload a prompt or record a new prompt.



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

Figure 4-9: Prompts

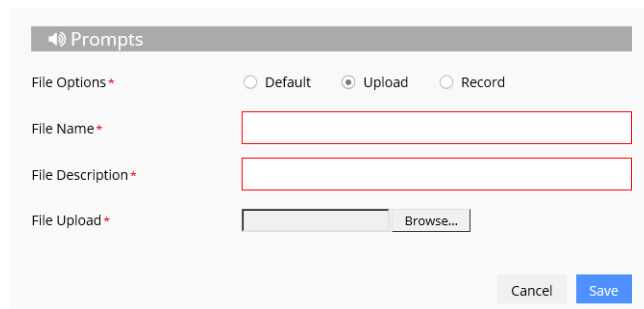
The screenshot shows the 'Prompts' configuration interface. It has a header 'Prompts' and a section 'File Options' with radio buttons for 'Default', 'Upload', and 'Record'. The 'Default' option is selected. At the bottom right, there are 'Cancel' and 'Save' buttons.

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

➤ **To upload a prompt:**

1. Click the **Upload** option.

Figure 4-10: Upload Prompt



The screenshot shows a web form titled 'Prompts' with a speaker icon. It has three radio buttons for 'File Options': 'Default', 'Upload' (which is selected), and 'Record'. Below these are three input fields: 'File Name *', 'File Description *', and 'File Upload *'. The 'File Upload *' field has a 'Browse...' button next to it. At the bottom right are 'Cancel' and 'Save' buttons.

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.

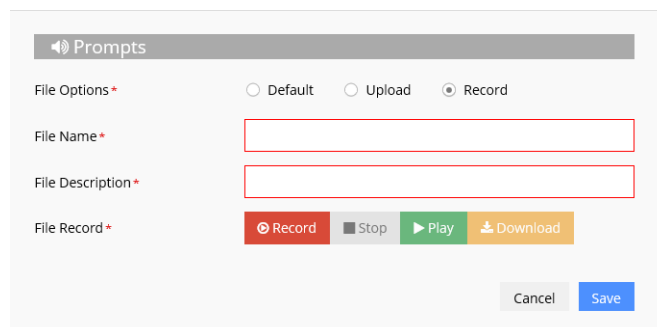


The audio file must be in the following format - .wav file, with 16 Bit Resolution, mono, 8000Hz.

➤ **To record a prompt:**

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

Figure 4-11: Record New Prompt Details



The screenshot shows the same 'Prompts' form, but now the 'Record' radio button is selected. The 'File Upload *' field is replaced by a 'File Record *' section containing four buttons: 'Record' (red), 'Stop' (grey), 'Play' (green), and 'Download' (orange). The 'Cancel' and 'Save' buttons remain at the bottom right.

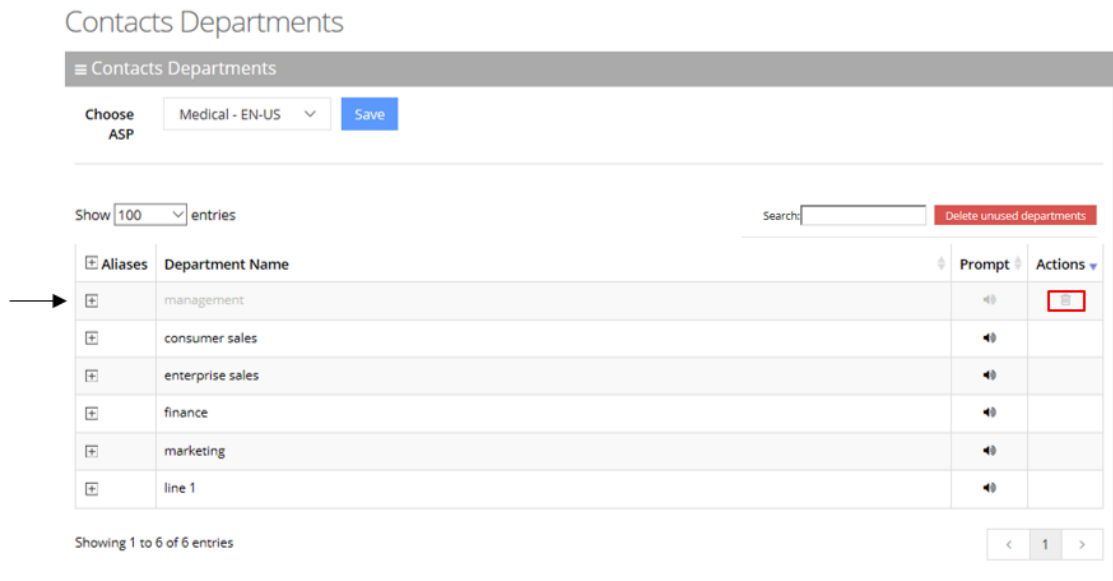
2. When finished recording, click **Stop**.
3. To replay the recent recording, click **Play**.
4. To save a copy of the recorded audio file, click **Download**.
5. Click **Save** to complete the recording process.

Deleting a Department with No Contacts

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

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

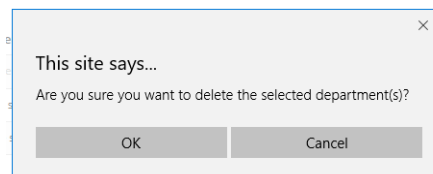
Figure 4-12: Deleting Department with No Contacts



➤ **To delete the department with no contacts:**

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

Figure 4-13: Deleting Department



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

Importing a Package

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



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

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

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

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

Figure 4-14: Importing Package

Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show 100 entries Search: Delete unused departments

Aliases	Department Name	Prompt	Actions
<input type="checkbox"/>	cardiovascular	<input type="radio"/>	
<input type="checkbox"/>	consumer sales	<input type="radio"/>	
<input type="checkbox"/>	enterprise sales	<input type="radio"/>	
<input type="checkbox"/>	finance	<input type="radio"/>	
<input type="checkbox"/>	line 1	<input type="radio"/>	
<input type="checkbox"/>	management	<input type="radio"/>	<input type="checkbox"/>
<input type="checkbox"/>	marketing	<input type="radio"/>	
<input type="checkbox"/>	obstetrics	<input type="radio"/>	

Aliases Primary Recognize Import Package

obstetrics

Prompts

File Options ☒ Default ☐ Upload ☐ Record

Cancel Save

5. The Import Package page appears.

Figure 4-15: Import Package Page

Import Package - Medical ×

Show entries Search: Import Package

<input type="checkbox"/>	NAME	category	recording
<input type="checkbox"/>	תזונה ודיאטה	מחלקות	MEDIC_26251.ul
<input type="checkbox"/>	מרפאות חוץ	מחלקות	MEDIC_2625_D.ul
<input type="checkbox"/>	מחלקה ראומטולוגית	מחלקות	MEDIC_2629.ul
<input type="checkbox"/>	הנפקת תו חניה	מחלקות	MEDIC_2639.ul
<input type="checkbox"/>	מעבדה מיקרוביולוגית	מחלקות	MEDIC_2641_R.ul
<input type="checkbox"/>	מרפאה סכרת אנדוקרינית	מחלקות	MEDIC_265.ul
<input type="checkbox"/>	מרפאה תעסוקתית	זימון תורים	MEDIC_266.ul
<input type="checkbox"/>	מרפאה תעסוקתית	מחלקות	MEDIC_266.ul
<input type="checkbox"/>	היחידה להריון בסיכון	זימון תורים	MEDIC_267.ul
<input type="checkbox"/>	הריון בסיכון גבוה	מחלקות	MEDIC_267.ul
<input type="checkbox"/>	מרפאת אנדומטריזיס	זימון תורים	MEDIC_269.ul
<input type="checkbox"/>	מרפאת אנדומטריזיס	מחלקות	MEDIC_269.ul
<input type="checkbox"/>	מרפאות ילדים	זימון תורים	MEDIC_270.ul
<input type="checkbox"/>	מרפאות ילדים	מחלקות	MEDIC_270.ul
<input type="checkbox"/>	מכון אנדוקרינולוגי	מחלקות	MEDIC_2706.ul
<input type="checkbox"/>	ארכיון מרפאות	מחלקות	MEDIC_2715.ul
<input type="checkbox"/>	מרפאה כירורגית חזה	זימון תורים	MEDIC_2717.ul

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

Figure 4-16: Import Package Page

Import Package - Medical

<input type="checkbox"/>	סמנכ"ל מ"פ	מחלקות	MEDIC_314.ul
<input type="checkbox"/>	מרפאת עיניים גלאוקומה	זימון תורים	MEDIC_316.ul
<input type="checkbox"/>	מרפאת עיניים גלאוקומה	מחלקות	MEDIC_316.ul
<input type="checkbox"/>	ענף שכר	מחלקות	MEDIC_317.ul
<input type="checkbox"/>	פעילות משקמת	מחלקות	MEDIC_318.ul
<input type="checkbox"/>	פניות הציבור	מחלקות	MEDIC_319.ul
<input type="checkbox"/>	נירולוגיה קוגניטיבית	מחלקות	MEDIC_3190_R.ul
<input type="checkbox"/>	אשפוז יום פסכיאטרי	מחלקות	MEDIC_321.ul
<input type="checkbox"/>	צלם רפואי	מחלקות	MEDIC_324.ul
<input type="checkbox"/>	רכש	מחלקות	MEDIC_3242.ul
<input type="checkbox"/>	קבלה ושחרור יולדות	זימון תורים	MEDIC_326.ul
<input checked="" type="checkbox"/> קבלה ושחרור יולדות			
<input checked="" type="checkbox"/> קבלה ושחרור יולדות <input checked="" type="checkbox"/> הפלות <input checked="" type="checkbox"/> שחרור יולדות <input checked="" type="checkbox"/> הפסקת הריון			
<input type="checkbox"/>	קבלה ושחרור יולדות	מחלקות	MEDIC_326.ul
<input checked="" type="checkbox"/> קבלה ושחרור יולדות			
<input checked="" type="checkbox"/> קבלה ושחרור יולדות <input checked="" type="checkbox"/> שחרור יולדות			
<input type="checkbox"/>	מרפאת קרדיולוגיה גרעינית	זימון תורים	MEDIC_327.ul
<input type="checkbox"/>	מרפאת קרדיולוגיה גרעינית	מחלקות	MEDIC_327.ul
<input type="checkbox"/>	מעבדה מטבולית	מחלקות	MEDIC_3317_R.ul
<input type="checkbox"/>	קרדיולוגיה ילדים	מחלקות	MEDIC_332.ul

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

Figure 4-17: Selected Departments

Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show 100 entries Search Delete unused departments

Aliases	Department Name	Prompt	Actions
<input type="checkbox"/>	cardiovascular	<input type="radio"/>	
<input type="checkbox"/>	consumer sales	<input type="radio"/>	
<input type="checkbox"/>	enterprise sales	<input type="radio"/>	
<input type="checkbox"/>	finance	<input type="radio"/>	
<input type="checkbox"/>	line 1	<input type="radio"/>	
<input type="checkbox"/>	management	<input type="radio"/>	<input type="checkbox"/>
<input type="checkbox"/>	marketing	<input type="radio"/>	
<input type="checkbox"/>	obstetrics	<input type="radio"/>	

Aliases

obstetrics ☒ Primary Recognize ☒

Acute pain services ☐ Primary

Anesthesiology ☐ Primary

Anaesthetics ☐ Primary

אורטופדיית לידים ☐ Primary

מחלקה אורטופדיית לידים ☐ Primary

Prompts

File Options * ☒ Default ☐ Upload ☐ Record

Cancel Save

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

Figure 4-18: Imported Departments

Contacts Departments

1. Select ASP

Medical - HE-IL Save

2. Departments

Show 100 entries Search: Delete unused departments

Aliases	Department Name	Prompt	Actions
	cardiovascular		
	consumer sales		
	enterprise sales		
	finance		
	line 1		
	management		
	marketing		
	obstetrics		

Aliases

obstetrics Primary Recognize

Acute pain services Primary

Anesthesiology Primary

Anaesthetics Primary

אורטופדיית ילדים Primary

נחלקה אורטופדיית ילדים Primary

Prompts

File Options Default Upload Record

Cancel Save

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 4-19: New Department Dictionary

New Department Dictionary

≡ New Department Dictionary - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Dictionary Details

Dictionary Name ASP

AutoAttendant - { }

+ More Dictionary

Continue

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

Figure 4-20: Provide Department Dictionary Details

New Department Dictionary

≡ New Department Dictionary - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Dictionary Details

Dictionary Name ASP

IT Menu AutoAttendant - i

+ More Dictionary

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 4-21: Edit Department Dictionary

Departments

≡ Dictionary List

Show 100 entries

+ Add New Actions

Edit Dictionary

Delete Dictionary

<input type="checkbox"/>	Department Dictionary	Application Software Package (ASP)	Dialect
<input checked="" type="checkbox"/>	Default	AutoAttendant	HE-IL
<input type="checkbox"/>	Emp_or_Dep	AutoAttendant	HE-IL

Showing 1 to 2 of 2 entries

< 1 >

4. Edit the required fields.

Figure 4-22: Edit Department Dictionary Details

Edit Department Dictionary

≡ Edit Department Dictionary - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Dictionary Details

Dictionary Name: Default Application Software Package (ASP): 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 4-23: Delete Department Dictionary

Departments

≡ Dictionary List

Show 100 entries

Department Dictionary	ASP	Dialect
<input type="checkbox"/> Default	AutoAttendant	HE-IL
<input checked="" type="checkbox"/> US Department	AutoAttendant	HE-IL

Showing 1 to 2 of 2 entries

Actions: + Add New, Edit Department, Delete Dictionary

Adding a Department Manually

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

➤ To add a department manually:

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

Figure 4-24: Open Department List

Departments

≡ Dictionary List

Show entries

<input type="checkbox"/>	Department Dictionary
<input type="checkbox"/>	Default
<input type="checkbox"/>	US Department

Showing 1 to 2 of 2 entries

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

Figure 4-25: New Department

New Department

≡ New Department - Step 1 of 2

1
Department Details

2
Confirm

Provide Department Details

UID

Department Name

Extension

Parent Department

+ More Departments

Continue ➞

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 4-26: Provide Department Details

Provide Department Details

UID	Department Name	Extension	Parent Department
ABC	Human Resources	4000	

[+ More Departments](#)

[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 4-27: Disabling a Department

Departments

Department Details

+ Add New Actions

Show 100 entries

Se

		Department Name	Parent Department	Extension	
<input type="checkbox"/>	<input type="checkbox"/>	Human Resources		4000	
<input type="checkbox"/>	<input type="checkbox"/>	Logistics	Admin	4341	active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Marcom	Marketing	4242	active
<input type="checkbox"/>	<input type="checkbox"/>	Technical Writing	Marketing	4300	active

Showing 1 to 4 of 4 entries

< 1 >

Activate Department
Disable Department
Edit Department
Delete Department

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

Figure 4-28: Disabled Department

Departments

Department Details

+ Add New Actions

Show 100 entries

Search:

		Department Name	Parent Department	Extension	Status
<input type="checkbox"/>	<input type="checkbox"/>	Human Resources		4000	active
<input type="checkbox"/>	<input type="checkbox"/>	Logistics	Admin	4341	active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Marcom	Marketing	4242	disabled
<input type="checkbox"/>	<input type="checkbox"/>	Technical Writing	Marketing	4300	active

Showing 1 to 4 of 4 entries

< 1 >

Activating a Department

The procedure below describes how to activate a department.

➤ To activate a department:

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

Figure 4-29: Activate a Department

Department Details					+ Add New	⚙ Actions
Show 100 entries					Se	
<input type="checkbox"/>	Department Name	Parent Department	Extension	Actions		
<input type="checkbox"/>	Human Resources		4000	Transfer to Extension: 4000		
<input checked="" type="checkbox"/>	Import/Export			Transfer to Extension:		
<input type="checkbox"/>	Logistics		4432	Transfer to Extension: 4432		
<input type="checkbox"/>	Marcom	Marketing	4414	Transfer to Extension: 4414		
<input type="checkbox"/>	Technical Writing	Marketing	4081	Transfer to Extension: 4081		

Showing 1 to 5 of 5 entries

< 1 >

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

Figure 4-30: Activated Department

Departments

Department Details					+ Add New	⚙ Actions
Show 100 entries					Search:	
<input type="checkbox"/>	Department Name	Parent Department	Extension	Status		
<input type="checkbox"/>	Human Resources		4000	active		
<input type="checkbox"/>	Import/Export	International Relations	1009	active		
<input type="checkbox"/>	Logistics	Admin	4432	active		
<input type="checkbox"/>	Marcom	Marketing	4414	active		
<input type="checkbox"/>	Technical Writing	Marketing	4081	active		

Editing a Department

The procedure below describes how to edit a department.

➤ To edit a department:

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

Figure 4-31: Department Detail Actions

The screenshot shows the 'Departments' section with a 'Dictionary List' table. The table has columns for 'Dictionary Name', 'Application Software Package (ASP)', and 'Dialect'. The 'Default' dictionary is selected. The 'Actions' menu is open, showing options like 'Add New', 'Edit Dictionary', and 'Delete Dictionary'.

Dictionary Name	Application Software Package (ASP)	Dialect
<input checked="" type="checkbox"/> Default	AutoAttendant	HE-IL
<input type="checkbox"/> Emp_or_Dep	AutoAttendant	HE-IL

Figure 4-32: Edit Department Dictionary

The screenshot shows the 'Edit Department Dictionary - Step 1 of 2' screen. It has a progress bar with two steps: '1 Department Details' (active) and '2 Confirm'. The 'Provide Department Dictionary Details' section contains a 'Dictionary Name' field with 'Default' and an 'Application Software Package (ASP)' dropdown menu with 'AutoAttendant - HE-IL' selected. A 'Continue' button is at the bottom.

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

Figure 4-33: Edit Department – Save Changes

The screenshot shows the 'Edit Department - Step 2 of 2' screen. It has a progress bar with two steps: '1 Department Details' (completed) and '2 Confirm' (active). The 'Confirm Information' section is divided into 'General', 'Actions', 'Prompts', and 'Aliases'. The 'General' section shows 'UID: ABC', 'Department Name: Human Resources', 'Parent Department:', and 'Extension: 4001'. The 'Actions' section shows 'Action 1: Transfer to Extension' with 'Data: 4001' and 'Action 2' with 'Data:'. The 'Prompts' section shows 'File Options: Default'. The 'Aliases' section is empty. At the bottom, there are 'Back' and 'Save Changes' buttons.

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

Figure 4-34: Updated Information

Default - Departments

Department Details						+ Add New	⚙ Actions
Show 100 entries		Search					
<input type="checkbox"/>	Department Name	Parent Department	Extension	Actions	Status		
<input type="checkbox"/>	Department Name	Department	Extension	Transfer to Extension: Extension	active		
<input type="checkbox"/>	Human Resources		4001	Transfer to Extension: 4001	active		
<input type="checkbox"/>	Logistics	Admin	4341	Transfer to Extension: 4341	active		
<input type="checkbox"/>	Marcom	Marketing	4242	Transfer to Extension: 4242	active		
<input type="checkbox"/>	TW	HR	marketing	Transfer to Extension: marketing	active		
Showing 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 4-35: Departments List

Departments

Dictionary List

+ Add New

Actions

Show 100 entries

Search

<input type="checkbox"/>	Department Dictionary	ASP	Dialect
<input type="checkbox"/>	Default	AutoAttendant	HE-IL
<input type="checkbox"/>	English Departments	AutoAttendant	HE-IL
<input type="checkbox"/>	Hebrew Departments	AutoAttendant	HE-IL

Showing 1 to 3 of 3 entries

<

1

>

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

Figure 4-36: Selecting Department within Departments List

Default - Departments

Department Details + Add New ⚙ Actions					
Show 100 entries			Search		
<input type="checkbox"/>	Department Name	Parent Department	Extension	Actions	Status
<input type="checkbox"/>	Department Name	Department	Extension	Transfer to Extension: Extension	active
<input type="checkbox"/>	Human Resources		4000	Transfer to Extension: 4000	active
<input checked="" type="checkbox"/>	Logistics	Admin	4341	Transfer to Extension: 4341	active
<input type="checkbox"/>	Marcom	Marketing	4242	Transfer to Extension: 4242	active
<input type="checkbox"/>	TW	HR	marketing	Transfer to Extension: marketing	active
Showing 1 to 5 of 5 entries					
< 1 >					

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

Figure 4-37: Selecting Department

Default - Departments

Department Details + Add New ⚙ Actions					
Show 100 entries			See		
				<ul style="list-style-type: none"> Activate Department Disable Department Edit Department Delete Department 	
<input type="checkbox"/>	Department Name	Parent Department	Extension	Actions	Status
<input type="checkbox"/>	Department Name	Department	Extension	Transfer to Extension: Extension	
<input type="checkbox"/>	Human Resources		4000	Transfer to Extension: 4000	active
<input checked="" type="checkbox"/>	Logistics	Admin	4341	Transfer to Extension: 4341	active
<input type="checkbox"/>	Marcom	Marketing	4242	Transfer to Extension: 4242	active
<input type="checkbox"/>	TW	HR	marketing	Transfer to Extension: marketing	active
Showing 1 to 5 of 5 entries					
< 1 >					

- Select **Edit Department**; the following screen appears:

Figure 4-38: Selecting Edit Department

Edit Department

■ Edit Department - Step 1 of 2

1 Department Details 2 Confirm

General

UID* LLL

Department* Logistics

Parent Department Admin

Extension 4341

Actions for the Department

Action 1 Transfer to Extension ▼ Data 4341

Action 2 Data

Activate Non-Working Hours Behavior ☐

Prompts for the Department

File Options* ☒ Default ☐ Upload ☐ Record

Aliases for the Department

+ More Aliases

Continue

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

Figure 4-39: Actions for Department Fields

Edit Department

■ Edit Department - Step 1 of 2

1 Department Details 2 Confirm

General

UID* LLL

Department* Logistics

Parent Department Admin

Extension 4341

Actions for the Department

Action 1 Transfer to Extension ▼ Data 4341

Action 2 Data

Activate Non-Working Hours Behavior ☐


Prompts for the Department

File Options* ☒ Default ☐ Upload ☐ Record

Aliases for the Department

+ More Aliases

Continue

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



- ◆ 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.

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 55.
2. From the screen in Step 5, enable the 'Activate Non-Working Hours Behavior' check box; the following fields become available.

Figure 4-40: Non-Working Hours Behavior Fields

The screenshot displays the 'General' settings page for a department. The 'UID' is 44, 'Department' is 'Endocrinology', 'Parent Department' is 'Endocrinology', and 'Extension' is '4411'. Under the 'Actions for the Department' section, 'Action 1' is 'Transfer to Extension' with 'Data' '4411'. 'Action 2' and 'Action 3' are both 'Data'. The 'Activate Non-Working Hours Behavior' checkbox is checked and highlighted with a red box. Below it, the 'Working Hour Set' is set to 'Default'. Under the 'Prompts for the Department' section, 'File Options' are set to 'Default'. Under the 'Aliases for the Department' section, 'Diabetes' is listed as an alias with a red minus button next to it, and a green '+ More Aliases' button is below it. A blue 'Continue' button is at the bottom right.

General

UID* 44

Department* Endocrinology

Parent Department Endocrinology

Extension 4411

Actions for the Department

Action 1 Transfer to Extension Data 4411

Action 2 Data

Action 3 Data

Activate Non-Working Hours Behavior ☒

Working Hour Set Default

Action 1 Transfer to Extension Data 4411

Action 2 Data

Action 3 Data

Ignore Non-Working Hours Behavior None

Prompts for the Department

File Options* ☒ Default ☐ Upload ☐ Record

Aliases for the Department

Diabetes -

+ More Aliases

Continue

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 4-41: Activate Non-Working Hours Behavior Fields

General

UID* 44

Department* Endocrinology

Parent Department Endocrinology

Extension 4411

Actions for the Department

Action 1 Transfer to Extension Data 4411

Action 2 Data

Action 3 Data

Activate Non-Working Hours Behavior

Working Hour Set

Action 1 Play prompt
Go to menu
Transfer to Operator
Disconnect
Transfer to Phone
Transfer to Extension
Send SMS Data

Action 2 Disconnect Data

Action 3 Data

Ignore Non-Working Hours Behavior None

Prompts for the Department

File Options* ☒ Default ☐ Upload ☐ Record


Aliases for the Department

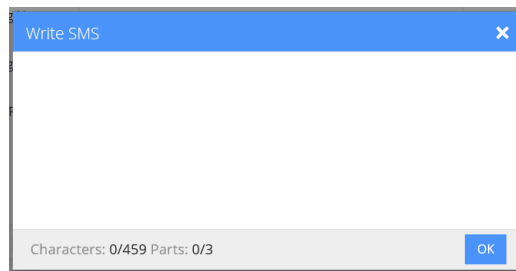
Diabetes

+ More Aliases

Continue (9)

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

- **Play prompt:** The system will play a prompt described in the Action 1 Data field and then perform the action described in Action 2.
- **Go to menu:** The system will be directed to another menu, specified in the Action 1 Data field.
- **Transfer to Operator:** The system will transfer the call to the operator.
- **Disconnect:** The system will automatically disconnect.
- **Transfer to Phone:** The system will transfer the call to a phone number as shown in in the Action 1 Data field.
- **Transfer to Extension:** The system will transfer the call to the extension number.
- **Send SMS:** Allows for an SMS message to be sent.
 - ◆ If you want to send an SMS, from the 'Action 1' drop-down list, select **Send SMS**.
 - ◆ In the 'Action 1 Data' field, click the  icon; the following appears:



A dialog box titled "Write SMS" with a close button (X) in the top right corner. The main area is a large text input field. At the bottom, there is a status bar showing "Characters: 0/459 Parts: 0/3" and an "OK" button on the right.

- ◆ 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.



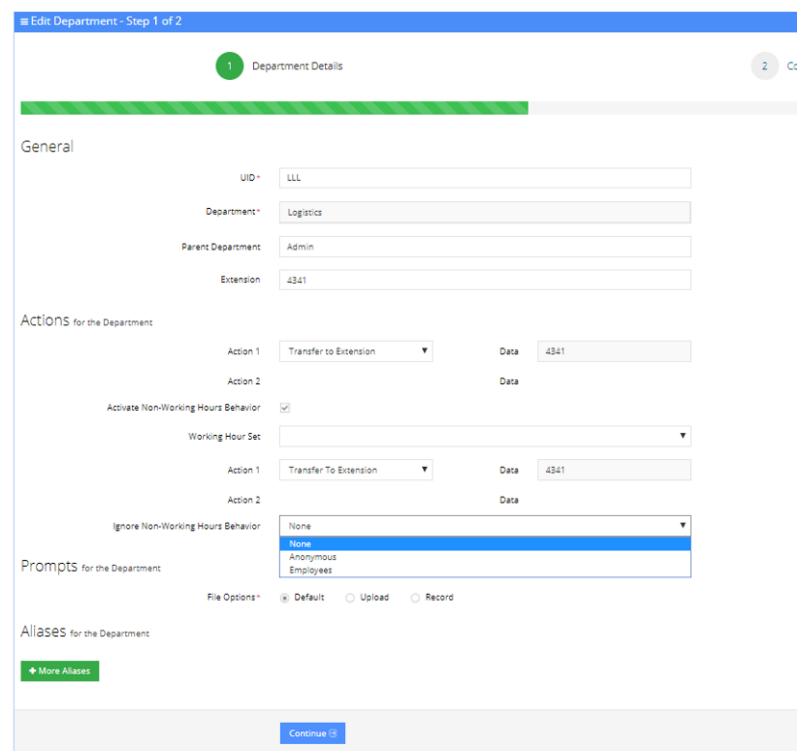
If you have selected "Send SMS" and you are calling from a mobile phone, the SMS is sent directly to your mobile phone. If you are calling from a landline, the system asks you to enter the mobile number that you wish to receive the SMS on.



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

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

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



The screenshot shows the "Edit Department - Step 1 of 2" form. The "Department Details" section includes fields for UID (LLL), Department (Logistics), Parent Department (Admin), and Extension (4341). The "Actions for the Department" section has two rows, each with Action 1 (Transfer to Extension) and Action 2 (Data: 4341). The "Activate Non-Working Hours Behavior" checkbox is checked. The "Working Hour Set" dropdown is set to "None". The "Ignore Non-Working Hours Behavior" dropdown is also set to "None". The "Prompts for the Department" section has a "File Options" section with radio buttons for Default, Upload, and Record. The "Aliases for the Department" section has a "More Aliases" button. A "Continue" button is at the bottom right.

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

Configuring Department Prompts

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

➤ To use the default department prompt:

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

Figure 4-43: Edit Department

Edit Department

≡ Edit Department - Step 1 of 2

1 Department Details 2 Confirm

General

UID * MMM

Department * Marcom

Parent Department Marketing

Extension 4242

Actions for the Department

Action 1	Transfer to Extension	Data	4242
Action 2		Data	
Action 3		Data	

Activate Non-Working Hours Behavior ☐

Prompts for the Department

File Options * ☒ Default ☐ Upload ☐ Record

Aliases for the Department

[+ More Aliases](#)

[Continue](#)

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

➤ **To upload a prompt:**

1. Click the **Upload** option.

Figure 4-44: New Prompt Details

Prompts for the Department

File Options* ☐ Default ☒ Upload ☐ Record

File Name*

File Description*

File Upload*

Aliases for the Department

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.

Figure 4-45: New Prompt Details – Choose File

Prompts for the Department

File Options* ☐ Default ☒ Upload ☐ Record

File Name*

File Description*

File Upload* Business Hours.wav

Aliases for the Department

5. Click **Choose File** to upload the file.

Figure 4-46: New Prompt Details - Choose File

Prompts

File Name: Business Hours

File Description: Recording to be played during business hours

Aliases

Back Save Changes

- 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:**

- Click **Record** and then begin recording your prompt.

Figure 4-47: Record New Prompt Details

New Prompt

≡ Prompt Details

File Name* aa

File Description* aa

File Upload/Record* ☐ Upload ☒ Record

Record Stop Play Download

Save Information Cancel

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

Creating an Alias for a Department

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

➤ **To create an alias for a department:**

1. Open the **Departments** menu and click on the required department (**Departments** > <department Dictionary name>).
2. Click on the **Department List** menu.
3. Select the department you wish to edit by selecting the **Department** check box.
4. From the 'Actions' drop-down list, select **Edit Department**.
5. Under the **Alias** group, click **+ More Aliases**; the following screen appears:

Figure 4-48: Create an Alias for a Department - Edit Department

Edit Department

Edit Department - Step 1 of 2

1 Department Details 2 Confirm

General

UID* 111

Department* TW

Parent Department HR

Extension 1234

Actions for the Department

Action 1 Transfer to Extension Data 1234

Action 2 Data

Action 3 Data

Activate Non-Working Hours Behavior ☐

Prompts for the Department

File Options* ☒ Default ☐ Upload ☐ Record

Aliases for the Department

+ More Aliases

Continue

6. Enter the alias name(s).

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

Edit Department

≡ Edit Department - Step 1 of 2

1

Department Details

2

Confirm

General

UID*

111

Department*

Technical Writing

Parent Department

HR

Extension

Marketing

Prompts for the Dictionary

File Options*

☒ Default ☐ Upload ☐ Record

Aliases for the Dictionary

TW

-

Technical Commminat

-

+ More Aliases

☐ Advanced Working Hours Options

Continue



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

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

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

≡ Edit Department - Step 2 of 2

1 ✓ Department Details

Confirm Information

General

UID:	TTT
Department Name:	Technical Writing
Parent Department:	Marketing
Extension:	4300

Prompts

File Options	Default
--------------	---------

Aliases

TW	Technical Communication
----	-------------------------

Back Save Changes

- In the above example, you can use either "TW", "Technical Communication" or "Technical Writing" when calling the Technical Writing department.
- 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:

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

Department Aliases

Department Aliases

≡ Department Aliases

Aliases and the departments to which they are mapped

Show entries Search:

Alias Name	Departments	Action
Cardiac Services	<div><div>🏥 Cardiology</div><div>🏥 Diabetes Center</div></div>	Add alias to a department
Diabetes	<div><div>🏥 Anaesthetics</div><div>🏥 Diabetes Center</div></div>	Add alias to a department
Cardiovascular	<div><div>🏥 Cardiology</div></div>	Add alias to a department

Showing 1 to 3 of 3 entries

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

Figure 4-51: Add Alias to Department

Add alias to department

select department:

Anaesthetics

Cardiology

Diabetes Center

Endocrinology

Save

Cancel

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

Figure 4-52: Department Aliases - Example

Department Aliases

Department Aliases

Aliases and the departments to which they are mapped

Show entries Search:

Alias Name	Departments	Action
Cardiovascular	<div><div>Cardiology</div><div>Diabetes Center</div><div>Endocrinology</div></div>	Add alias to a department
Cardiac Services	<div><div>Cardiology</div><div>Diabetes Center</div></div>	Add alias to a department
Diabetics	<div><div>Anaesthetics</div></div>	Add alias to a department

Showing 1 to 3 of 3 entries

➤ **To delete an Alias from a Department:**

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

Figure 4-53: Department Aliases

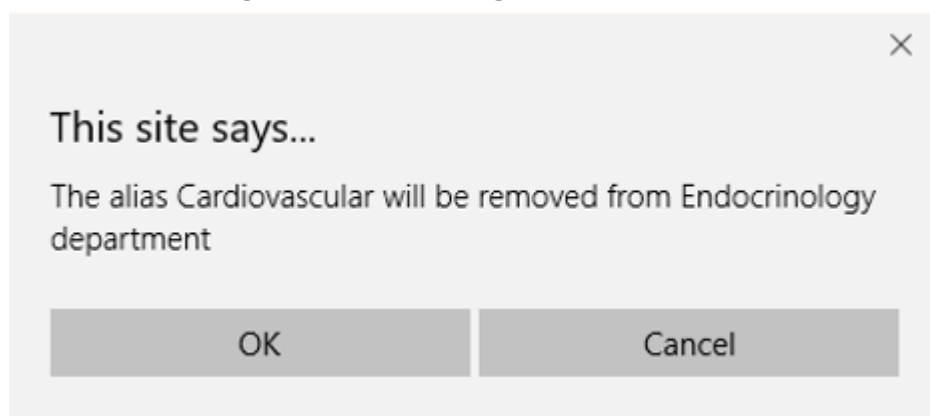
Department Aliases

Alias Name	Departments	Action
Cardiovascular		Add alias to a department
Cardiac Services		Add alias to a department
Diabetes		Add alias to a department

Showing 1 to 3 of 3 entries

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

Figure 4-54: 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 4-55: Searching for an Alias/Department

Contacts Departments Aliases

The screenshot shows the 'Department Aliases' interface. At the top, there's a header 'Department Aliases'. Below it, a yellow banner reads 'Aliases and the departments to which they are mapped'. A search bar on the right contains the text 'consumer'. On the left, a 'Show' dropdown is set to '100' entries. Below the search bar is a table with three columns: 'Alias Name', 'Departments', and 'Action'. The 'Alias Name' column contains 'Sales'. The 'Departments' column shows three red tags: 'consumer sales', 'enterprise sales', and 'marketing'. The 'Action' column contains a blue button labeled 'Add alias to a department'. At the bottom, a status bar indicates 'Showing 1 to 1 of 1 entries (filtered from 3 total entries)' and a pagination control shows '< 1 >'.

Deleting a Department

The procedure below describes how to delete a department.

➤ **To delete a department:**

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

Searching a Department

The procedure below describes how to search for a department.

➤ **To search for a department:**

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

Figure 4-56: Search Department

Departments

Department Details + Add New ⚙ Actions ▾

Show entries Search:

		Department Name	Parent Department	Extension	Status
<input type="checkbox"/>	<input type="checkbox"/>	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 4-57: Import/Export Department List

Default - Departments

Department Details + Add New ⚙ Actions ▾

Show entries

		Department Name	Parent Department	Extension	Actions
<input type="checkbox"/>	<input type="checkbox"/>	Finance		4451	Transfer to Extension: 4451
<input type="checkbox"/>	<input type="checkbox"/>	primi a	primi	6123	Transfer to Extension: 6123

Showing 1 to 2 of 2 entries

Se
 ▲ Import Departments List
 ▲ Export Departments list
 ⚙ Activate Department
 ⚙ Disable Department
 ✎ Edit Department
 ⚙ 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 4-58: Import Departments List

Import Departments List

Import your departments list from CSV or Excel files

☐ Incremental Mode

☐ Overwrite empty departments 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.

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 4-59: Pre-Import Report

Pre-Import Report

≡ Pre-Import Details

Notice: The system is currently pending for action

Status	Records	Preview
New Entity	52	
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:

Figure 4-60: Uncompleted Department Import

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

- You can return to the Confirm Import or Cancel Import processes by clicking on the [here](#) link.
- 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.

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

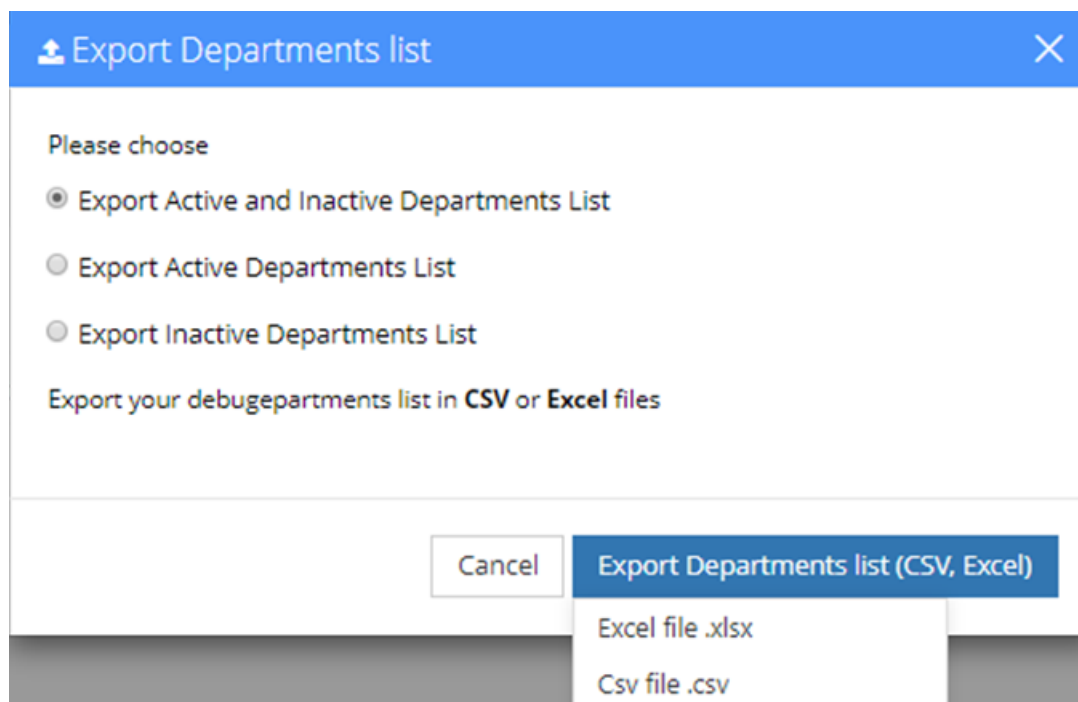
Exporting Department Information

The procedure below describes how to export department information.

➤ **To export department information:**

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

Figure 4-61: Export Departments List



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

5 Managing Branches

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

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

Please note that Branches feature is only supported in Israel.

Figure 5-1: Managing Branches

Branches

Branch Details		+ Add New	⚙ Actions ▾
Show	100 ▾	entries	Search: <input type="text"/>
<input type="checkbox"/>	Branch Name	Phone Number	
<input type="checkbox"/>	Central Branch	039991111	
<input type="checkbox"/>	Northern Branch	0988866	
<input type="checkbox"/>	Southern Branch	089999090	
Showing 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

Branch Details		+ Add New	⚙ Actions ▾
Show	100 ▾	entries	Search: <input type="text"/>
<input type="checkbox"/>	Branch Name	Phone Number	
<input type="checkbox"/>	Central Branch	039991111	
<input type="checkbox"/>	Northern Branch	0988866	
<input type="checkbox"/>	Southern Branch	089999090	
Showing 1 to 3 of 3 entries			< 1 >

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

Figure 5-3: New Branch

New Branch

≡ New Branch - Step 1 of 2

1 Branch Details

Provide Branch Details

UID Branch Name Phone Number Pivot

אבנ גוש

+ More Branches

Continue

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 ✓ Branch Details 2 Confirm

Confirm Information

Branches:	UID	Branch Name	Phone Number	Pivot
	ff4444	Center	03443322	j'h'n

Back Save Information

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

Editing a Branch

The procedure below describes how to edit a branch.

➤ **To edit a branch:**

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

Figure 5-5: Edit Branch - Step 1

Edit Branch

≡ Edit Branch - Step 1 of 2

1 Branch Details

General

UID* CCCC

Branch Name* Southern Branch

Phone Number 089999090

Pivot* באר שבע

Prompt

File Options* ☒ Default ☐ Upload ☐ Record

Cities

+ Add City

Aliases

+ More Aliases

Continue

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

Figure 5-6: Edit Branch - Step 2

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

Aliases

⬅ Back Save Changes ➡

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 76 on page [Adding a Branch](#) on page 76), you need to map cities to that branch.

➤ To map a city to a branch:

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



Setting the Pivot city is mandatory.

Figure 5-7: Map a City to a Branch

Edit Branch

≡ Edit Branch - Step 1 of 2


1 Branch Details 2 Confirm

General

UID* CCCD

Branch Name* Southern Branch


Phone Number 089999090


Pivot* באר שבע ▼ 

Prompt


File Options* ☒ Default ☐ Upload ☐ Record


Cities

*  Add City

באר שבע 

Aliases

 More Aliases

Continue 

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

Figure 5-8: Nearby Cities

Nearby Cities ✕

	City	Distance [km]	↑	Population [%]	Branches
<input checked="" type="checkbox"/>	באר שבע	0		2.524	Southern Branch
<input type="checkbox"/>	עומר	8.73		0.091	
<input type="checkbox"/>	חצרים	10.58		0.009	
<input type="checkbox"/>	תל שבע	10.91		0.211	
<input type="checkbox"/>	שגב-שלום	11.65		0.101	
<input type="checkbox"/>	אום בטין	13.08		0.03	
<input type="checkbox"/>	נבטים	13.98		0.009	
<input type="checkbox"/>	לקיה	15.33		0.124	
<input type="checkbox"/>	תראבין	15.68		0.005	
<input type="checkbox"/>	אשל הנשיא	16.71		0.003	
<input type="checkbox"/>	גבעות בר	16.84		0.005	
<input type="checkbox"/>	להבים	17.46		0.078	

1 2 3 4 5 ... 12

[Add Cities](#) [Close](#)

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.

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

Figure 5-9: Select Nearby Cities

Nearby Cities ✕

<input type="checkbox"/>	City	Distance [km]	↑	Population [%]	Branches
<input checked="" type="checkbox"/>	באר שבע	0		2.524	Southern Branch
<input checked="" type="checkbox"/>	עומר	8.73		0.091	
<input checked="" type="checkbox"/>	חצרם	10.58		0.009	
<input checked="" type="checkbox"/>	תל שבע	10.91		0.211	
<input checked="" type="checkbox"/>	שגב-שלום	11.65		0.101	
<input type="checkbox"/>	אום בסין	13.08		0.03	
<input type="checkbox"/>	נבטים	13.98		0.009	
<input type="checkbox"/>	לקיה	15.33		0.124	
<input type="checkbox"/>	תראבין	15.68		0.005	
<input type="checkbox"/>	אשל המשיא	16.71		0.003	
<input type="checkbox"/>	גבעות בר	16.84		0.005	
<input type="checkbox"/>	להבים	17.46		0.078	
<input type="checkbox"/>	אל סיד	18.03		0.04	

1 2 3 4 5 ... 12

[Add Cities](#) [Close](#)

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

Edit Branch

Edit Branch - Step 1 of 2

1 Branch Details

General

UID*

Branch Name*

Phone Number

Pivot*

Prompt

File Options* ☒ Default ☐ Upload ☐ Record

Cities

הרצליה	<input type="button" value="x"/>
טובת	<input type="button" value="x"/>
עפולה	<input type="button" value="x"/>
הוד השרון	<input type="button" value="x"/>
באר שבע	<input type="button" value="x"/>

Aliases

- Click **Continue**.

Figure 5-11: Mapping Cities – Save Changes

Edit Branch

Edit Branch - Step 2 of 2

1 ✓ Branch Details

Confirm Information

General

UID:

Branch Name:

Phone Number:

Pivot:

Prompt

File Options: ☒ Default ☐ Upload ☐ Record

Cities

באר שבע	<input type="button" value="x"/>
הרצליה	<input type="button" value="x"/>
טובת	<input type="button" value="x"/>
עפולה	<input type="button" value="x"/>
הוד השרון	<input type="button" value="x"/>

Aliases

- Click **Save Changes**.

Configuring Branch Prompts

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

➤ To use the default branch prompt:

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

Figure 5-12: Edit Branch

Edit Branch

≡ Edit Branch - Step 1 of 2

1 Branch Details

General

UID* CCCD

Branch Name* Southern Branch

Phone Number 089999090

Pivot* באר שבע

Prompt

File Options* ☒ Default ☐ Upload ☐ Record

Cities

+ Add City

Aliases

+ More Aliases

Continue

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

➤ To upload a prompt:

1. Click the **Upload** option.

Figure 5-13: Upload Prompt Details

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

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

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

➤ **To record a prompt:**

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

Figure 5-14: Record New Prompt Details

New Prompt

≡ Prompt Details

File Name*

aa

File Description*

aa

File Upload/Record*

☐ Upload ☒ Record

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:

Figure 5-15: Create an Alias for a Branch

1 Branch Details

General

UID* AA

Branch Name* Central Branch

Phone Number 039991111

Pivot* בית שמש

Prompt

File Options* ☒ Default ☐ Upload ☐ Record

Cities

+ Add City

Aliases

+ More Aliases

Continue

5. Enter the alias name(s).

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

1 Branch Details

General

UID* AA

Branch Name* Central Branch

Phone Number 039991111

Pivot* בית שמש

Prompt

File Options* ☒ Default ☐ Upload ☐ Record

Cities

+ Add City

Aliases

קנין נעים -

מגדל הים -

+ More Aliases

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

1 ✓ Branch Details

Confirm Information

General

UID: AA

Branch Name: Central Branch

Phone Number: 039991111

Pivot: בית שמש

Prompt

File Options: Default

Cities

Aliases

קנין גנמי
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 79).

Cities can be mapped either:

- Automatically
- Manually

Figure 5-18: Unmapped Cities

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	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	

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 ▾

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	
בת ים	1.647	Add city to branch	
רחובות	1.519	Add city to branch	

☆ By distance
 ☆ Selected branch
 ★ Cancel auto map

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	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
בת ים	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

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	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
בת ים	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 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	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	
בתי 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

Add city to branch

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

≡

Branch Details

+ Add New

⚙ Actions ▾

✎ Edit Branch

🗑 Delete Branch

Show

100 ▾

entries

		Branch Name	Phone Number
<div>+</div>	<div></div>	Northern Branch	0988866
<div>+</div>	<div></div>	Central Branch	039991111
<div>+</div>	<div></div>	Southern Branch	089999090
<div>+</div>	<div>✓</div>	Western	0699999999

Showing 1 to 4 of 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:**

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

Figure 5-26: Overlapping Branches Example

Overlapping Branches

The cities below have been mapped to more than one branch

Show entries

City	Population [%]	Branches
ירושלים	10.339	מנהל תחבורה מנהל תחבורה
עפולה	0.531	מנהל מנהל
ביתר עילית	0.51	מנהל תחבורה מנהל תחבורה
כפרות ציון	0.325	מנהל תחבורה מנהל תחבורה
אשקוד	0.313	מנהל תחבורה מנהל תחבורה
אבן יהודה	0.152	מנהל תחבורה מנהל תחבורה
ירחוד	0.106	מנהל תחבורה מנהל תחבורה

Showing 1 to 7 of 7 entries

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

Importing/Exporting Branch List

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

Figure 5-27: Import/Export Branch List

Branches

Branch Details

Show 100 entries

	Branch Name	Phone Number	Pivot
	0300 143	0863381150	
	0710	037326772	
	0217 708	086485172	
	0714 722	654	
	033450127	033450127	
	036000127	036000127	
	086711152	086711152	
	089493408	089493408	

Showing 1 to 10 of 10 entries

Actions

- Add New
- Import Branches List
- Export Branches List
- Edit Branch
- Delete Branch

Importing Branch Information

The procedure below describes how to import branch information.

➤ To import branch information:

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

Figure 5-28: Import Branches List

Import Branches List

Import your branches list from CSV or Excel files

☐ Incremental Mode

☐ Overwrite empty branches 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.

Cancel 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	
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 branches to be imported. In this example, 52 new branches are ready to be imported. Clicking the Preview icon, displays these new branches before they are imported.

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

Figure 5-30: Uncompleted Branch Import

Branches

≡ Branch Details

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

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



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

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

Figure 5-31: Branch Excel File Layout

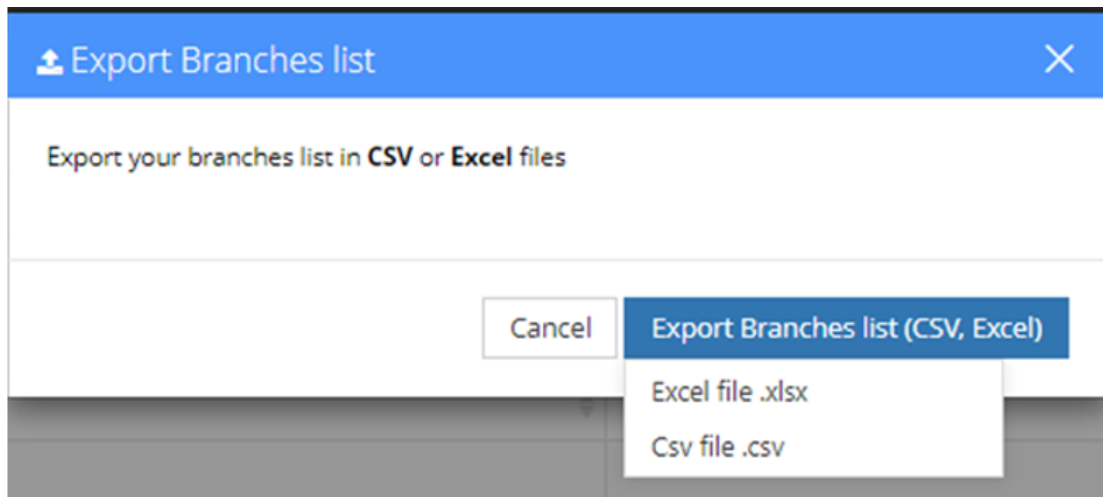
A	B	C	D
UID	Branch Name	Phone Number	Aliases
1111	New York	1001	Apple City

Exporting Branch Information

The following information describes how to export branch information.

➤ To export contact information:

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



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

6 Producing Reports

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

- IVR reports
- Branch reports
- App reports

IVR Reports

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

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

Overall Performance Report

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

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

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

Figure 6-1: Overall Performance IVR Filter Options

IVR Reports

The screenshot shows the 'Overall Performance' IVR Reports filter options. The interface includes a header bar with a hamburger menu icon and the text 'Overall Performance'. Below this is a green bar with a downward arrow and the text 'Filter Options'. The filter options are organized into a table-like structure with the following fields:

Date From	<input type="text"/>		<input type="text"/>	
Date To	<input type="text"/>		<input type="text"/>	
Call Source	<input type="text"/>	Exact	▼	
Call Routed	<input type="text"/>	Exact	▼	
Call Duration	<input type="text"/>	▼	to	<input type="text"/>
Call Disposition	Any ▼			
DNIS	Any ▼			

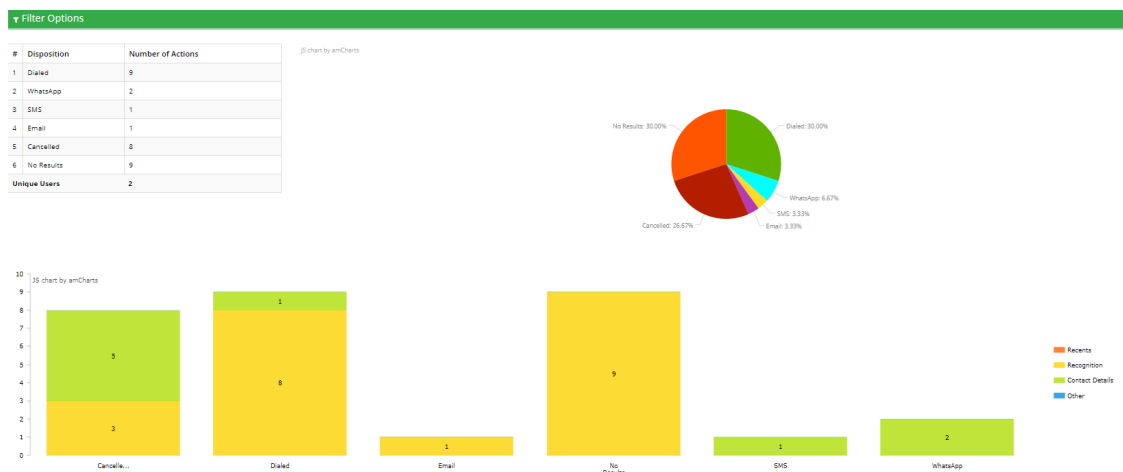
At the bottom of the filter options section, there are two buttons: a blue 'Generate' button with a checkmark icon and a grey 'Reset Filter' button with a downward arrow icon.

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.
 - **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
3. Click **Generate** to view the report output or Reset Filter to reset the filter values.
 4. Leaving the filter empty means don't filter on that field. It is recommended to set the Start Date and End Date filters, to shorten the report processing time.

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

Figure 6-2: Overall Performance IVR Report Example**Table 6-1: Overall Performance IVR Report Description**

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

Drill-down Report

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

➤ To generate a Drill-down report:

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

Figure 6-3: Drill-down IVR Filter Options

IVR Reports

≡ Drill-down

▼ Filter Options

Date From	<input type="text"/>		<input type="text"/>	
Date To	<input type="text"/>		<input type="text"/>	
Call Source	<input type="text"/>	Exact	▼	
Call Routed	<input type="text"/>	Exact	▼	
Call Duration	<input type="text"/>	▼	to	<input type="text"/>
Call Disposition	Any ▼			
DNIS	Any ▼			

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.

3. Click one of the following:

- Generate to view the report output
- Export CSV to export the report in 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.

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

Figure 6-4: Drill-down IVR Report Example

Filter Summary										
Date From: 18/06/2017										
Filter Options										
Show 25 entries Search:										
#	Customer	Domain	Source	Destination	Start Time	End Time	Duration	Disposition	Routed To	
1	AudioCodes	audiocodes.com	0544963045	4444	2017-06-19 16:25:44	2017-06-19 16:26:04	20	Transfer	4007	
2	AudioCodes	audiocodes.com	0544963045	4444	2017-06-19 16:25:18	2017-06-19 16:25:37	19	Transfer	4381	
3	AudioCodes	audiocodes.com	+97239764331	4444	2017-06-19 16:00:32	2017-06-19 16:00:43	11	Transfer	90017326522163	
4	AudioCodes	audiocodes.com	+97239764331	4444	2017-06-19 16:00:16	2017-06-19 16:00:28	12	Disconnect		
5	AudioCodes	audiocodes.com	+97239764331	4444	2017-06-19 15:58:17	2017-06-19 15:58:28	11	Transfer	90017326522163	
6	AudioCodes	audiocodes.com	+97239764418	4444	2017-06-19 15:42:19	2017-06-19 15:42:34	14	Transfer	0526483664	
7	AudioCodes	audiocodes.com	+97239764418	4444	2017-06-19 15:40:16	2017-06-19 15:40:31	15	Transfer	4260	
8	AudioCodes	audiocodes.com	+97239764715	4444	2017-06-19 15:29:34	2017-06-19 15:29:46	12	Transfer Fail	4513	
9	AudioCodes	audiocodes.com	+97239764372	4444	2017-06-19 15:28:00	2017-06-19 15:28:13	13	Transfer	4722	

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.
End Time	Displays the end time of the call.
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.
	Click on this to open the CDR and get more information, including hearing a recording of the call.

Call Date Report

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

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

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

Figure 6-5: Call Date IVR Filter Options

IVR Reports

≡ Call Date

▼ Filter Options

Date From	<input type="text"/>		<input type="text"/>	
Date To	<input type="text"/>		<input type="text"/>	
Call Source	<input type="text"/>	Exact	▼	
Call Routed	<input type="text"/>	Exact	▼	
Call Duration	<input type="text"/>	▼	to	<input type="text"/>
Call Disposition	Any ▼			
DNIS	Any ▼			

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.
3. Click one of the following:
- Generate to view the report output.
 - Export CSV to export the report in 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 concurrency on a given date.

Figure 6-6: Call Date IVR Report Example

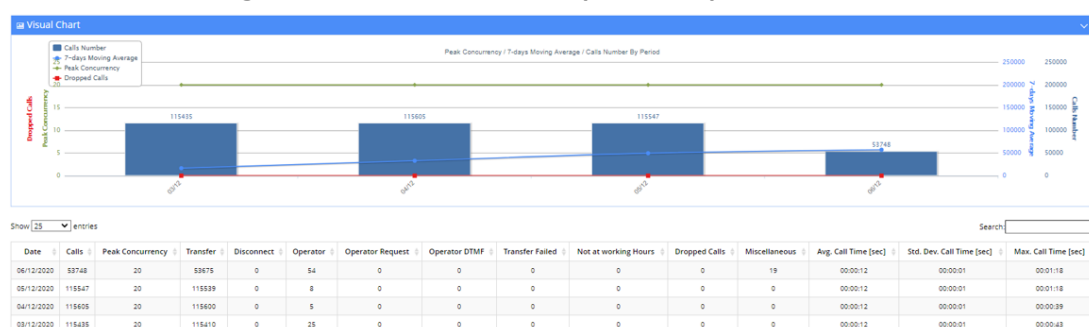


Table 6-3: Call Date IVR Report Description

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

Call Hour Report

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

➤ **To generate a Call Hour IVR report:**

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

Figure 6-7: Call Hour IVR Filter Options

IVR Reports

≡ Call Hour

▼ Filter Options ▼

Date	20/06/2017	📅
Call Duration	▼ to ▼	
DNIS	Any	▼

▼ 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.
3. Click one of the following:
 - Generate to view the report output.
 - Export CSV to export the report in 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

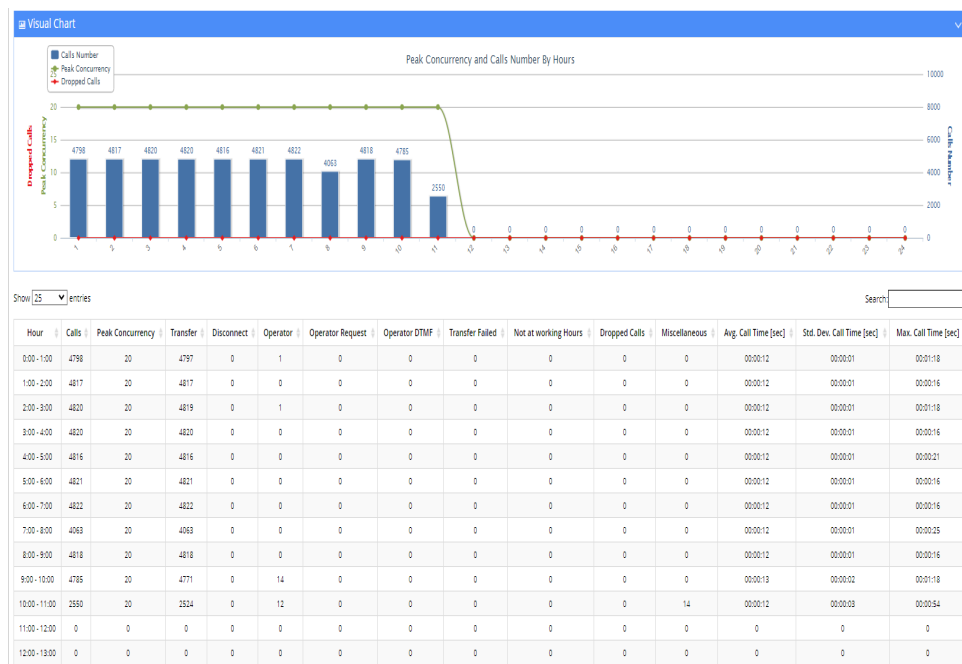


Table 6-4: Call Hour IVR Report Description

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).
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.

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

Requested Contacts Report

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

➤ To generate a Requested Contacts report:

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

Figure 6-9: Requested Contacts Report Filter

IVR Reports

≡ Requested Contacts

▼ Filter Options

Date From	<input type="text"/>		<input type="text"/>	
Date To	<input type="text"/>		<input type="text"/>	
Menu	Any			

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.

Figure 6-10: IVR Reports

IVR Reports

Requested Contacts

Filter Options

Date From: 01/09/2020

Date To:

Menu: Any

- Any
- Default Speech Menu
- Default Speech Branch Menu
- Emp_or_Dep_Menu
- Contacts
- Departments

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

Figure 6-11: Requested Contacts Report Example

IVR Reports

Requested Contacts

Filter Summary

Filter Options

Show 25 entries

Contact Name	Calls	Transfer Extension	Transfer Mobile	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Miscellaneous
Adi	3	0	0	0	0	0	0	0	0	3
Edna	1	0	0	0	0	0	0	0	0	1
Ami	4	0	0	0	0	0	0	0	0	4
Amir Klein	1	0	0	0	0	0	0	0	0	1

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.

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

Requested Departments Report

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

➤ To generate a Requested Departments report:

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

Requested Departments

IVR Reports

Requested Departments

Filter Options

Date From

Date To

Menu

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

Filter Options

Date From: 01/09/2020

Date To:

Menu: Any

- Any
- Default Speech Menu
- Default Speech Branch Menu
- Emp_or_Dep_Menu
- Contacts
- Departments

4. Click one of the following:

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

Figure 6-13: Requested Departments Report Example

IVR Reports

Requested Departments

Filter Summary

Filter Options

Show 25 entries

Search:

Department Name	Calls	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Miscellaneous
Marketing	1	1	0	0	0	0	0	0	0
Purchasing	1	0	0	0	0	0	0	0	1
Sales	2	2	0	0	0	0	0	0	0

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

Report Column	Description
	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.

Branch Reports

You can generate the following reports:

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

Branches by Date Report

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

➤ To generate a Branches by Date report:

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

Figure 6-14: Branches by Date Filter Options

Branch Reports

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

Figure 6-15: Branches by Date Report Example

Branch Reports

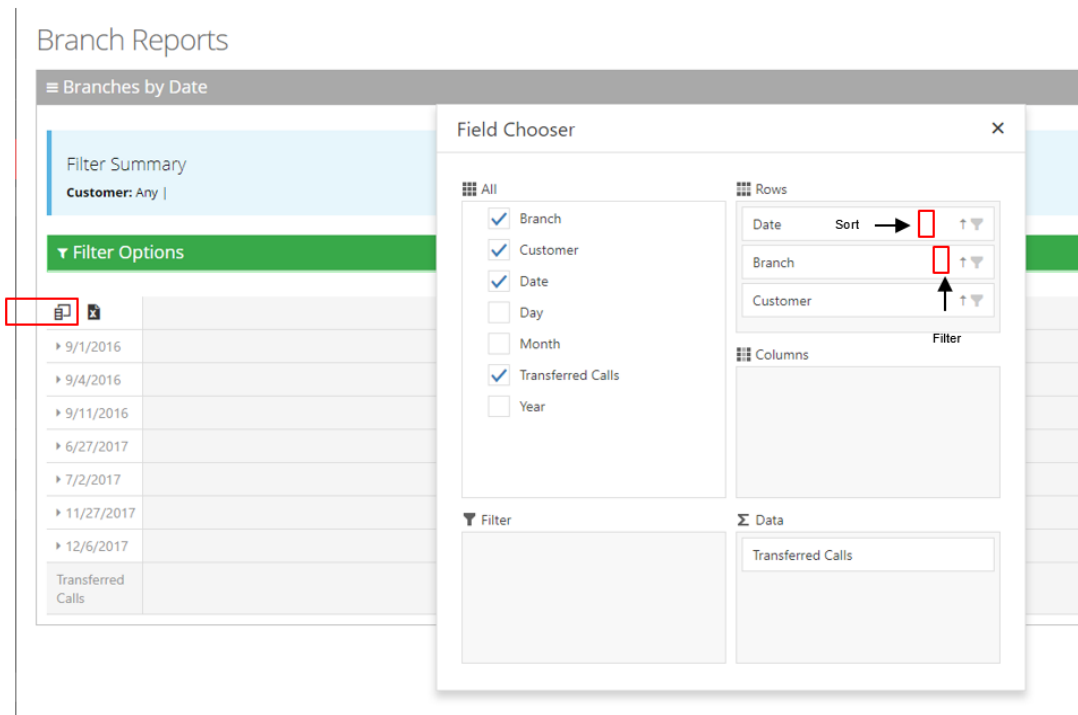
Filter Summary		
Date From: 22/06/2017		
Filter Options		
Transferred Calls		
6/22/2017		267
6/23/2017		93
6/24/2017		4
6/25/2017		335
6/26/2017 Total		281
אילת		2
אשדוד		3
אשקלון		6
באר שבע		1
בית שמש		8
הרצליה		8
חדרה		15
חיפה		24
טבריה		2
יפונה ושומרון		4

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.

Figure 6-16: Field Chooser



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

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

Requested Destination by Date Report

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

➤ To generate a Requested Destination by Date report:

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

Figure 6-17: Branches by Date Filter Options

Branch Reports

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

Branch Reports

Filter Summary	
Date From: 22/06/2017	
Filter Options	
Transferred Calls	
6/22/2017	267
6/23/2017	93
6/24/2017	4
6/25/2017	335
6/26/2017 Total	281
אביבים	5
אלות	2
אויאל	4
אסרוד	3
בית שמש	8
גבת	5
הצלה	1
חוב'ב	3
האון	2
הרציה	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:**

1. 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

▼ Filter Options

User	Any ▼	
Date From	<input type="text"/>	<input type="text"/>
Date To	<input type="text"/>	<input type="text"/>
Call Disposition	Any ▼	
OS Type	Any ▼	

✓ Generate

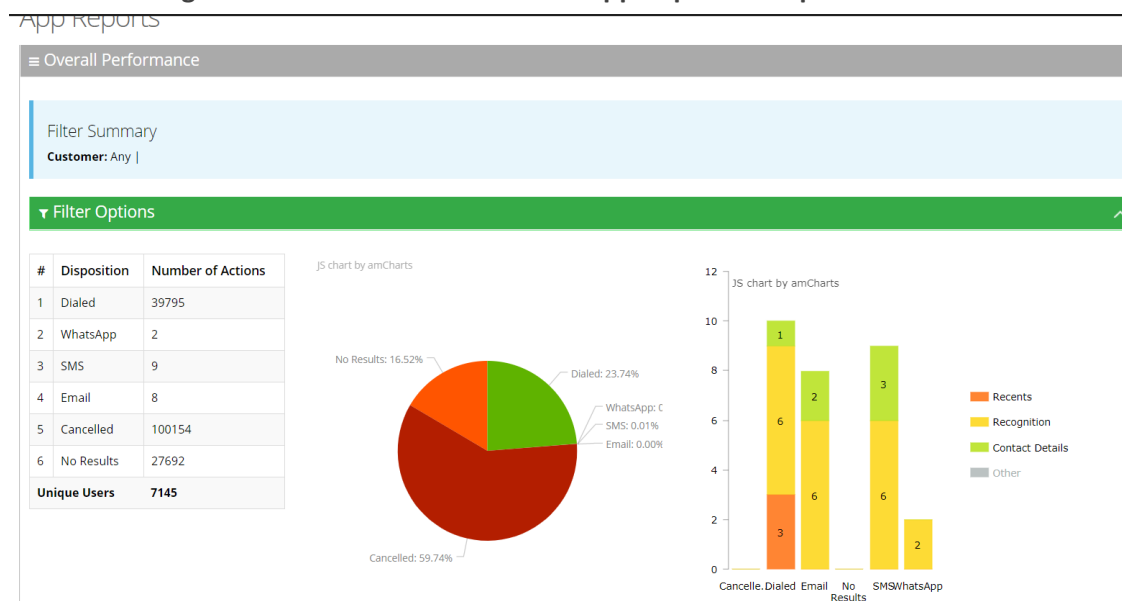
▼ Reset Filter

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:

1. 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

▼ Filter Options

User	Any	▼
Date From		📅
Date To		📅
Call Disposition	Any	▼
OS Type	Any	▼

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

Drill-down									
Filter Options									
Show 25 entries					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
3	AudioCodes	audiocodes.com	maayan.aharoni	+972544450864	2017-06-20 12:57:54	2017-06-20 12:58:01	6856	Dialed	iPhone8,1
4	AudioCodes	audiocodes.com	eitan.zisman		2017-06-20 12:03:09	2017-06-20 12:03:09	77	Cancelled	Redmi Note 3
5	AudioCodes	audiocodes.com	eitan.zisman		2017-06-20 12:03:08	2017-06-20 12:03:09	1396	Cancelled	Redmi Note 3
6	AudioCodes	audiocodes.com	nir.michaeli	+97239764398	2017-06-20 11:54:12	2017-06-20 11:54:19	7137	Dialed	iPhone7,1
7	AudioCodes	audiocodes.com	nir.michaeli		2017-06-20 11:54:06	2017-06-20 11:54:11	4946	No Results	iPhone7,1
8	AudioCodes	audiocodes.com	nir.michaeli	+97239764260	2017-06-20 11:53:10	2017-06-20 11:53:23	12961	Dialed	iPhone7,1

Table 6-5: Drill-down App Report Description

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

Report Column	Description
OS Type	Displays the operating system of the source device.
OS Version	Displays the operating system version of the source device.

Action Date Report

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

➤ To generate an Action Date app report:

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

Figure 6-23: Action Date App Filter Options

The screenshot shows the 'App Reports' interface with the 'Action Date' report selected. Below the title bar is a 'Filter Options' section with a green header and a dropdown arrow. The filter options include:

- User:** A dropdown menu.
- Date From:** A date input field with a calendar icon and a clear button.
- Date To:** A date input field with a calendar icon and a clear button.
- Disposition:** A dropdown menu with 'Any' selected.
- OS Type:** A dropdown menu with 'Any' selected.

At the bottom of the filter section are three buttons: 'Generate' (blue), 'Export CSV' (orange), and 'Reset Filter' (grey).

2. Select the appropriate filter fields:
 - **User:** Defines which user you want to filter on.
 - **Date From:** Defines the From Date from which the actions were made.
 - **Date To:** Defines the To Date that actions were made till.
 - **Call Disposition:** Defines the disposition of the action. It can be any of the following values:
 - ◆ Any
 - ◆ Dialed
 - ◆ WhatsApp
 - ◆ SMS

- ◆ Email
 - ◆ Cancelled
 - ◆ No Results
 - OS Type: Defines the Mobile Phone Operating System type. It can be any of the following values:
 - ◆ Any
 - ◆ Android
 - ◆ iPhone OS
3. Click one of the following:
- **Generate** to view the report output.
 - **Export CSV** to export the report to CSV format.
 - **Reset Filter** to reset the filter values.

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

Figure 6-24: Action Date App Report Example

Table 6-6: Action Date App Report Descriptions

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

Action Hour Report

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

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

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

Figure 6-25: Action Hour App Filter Options

App Reports

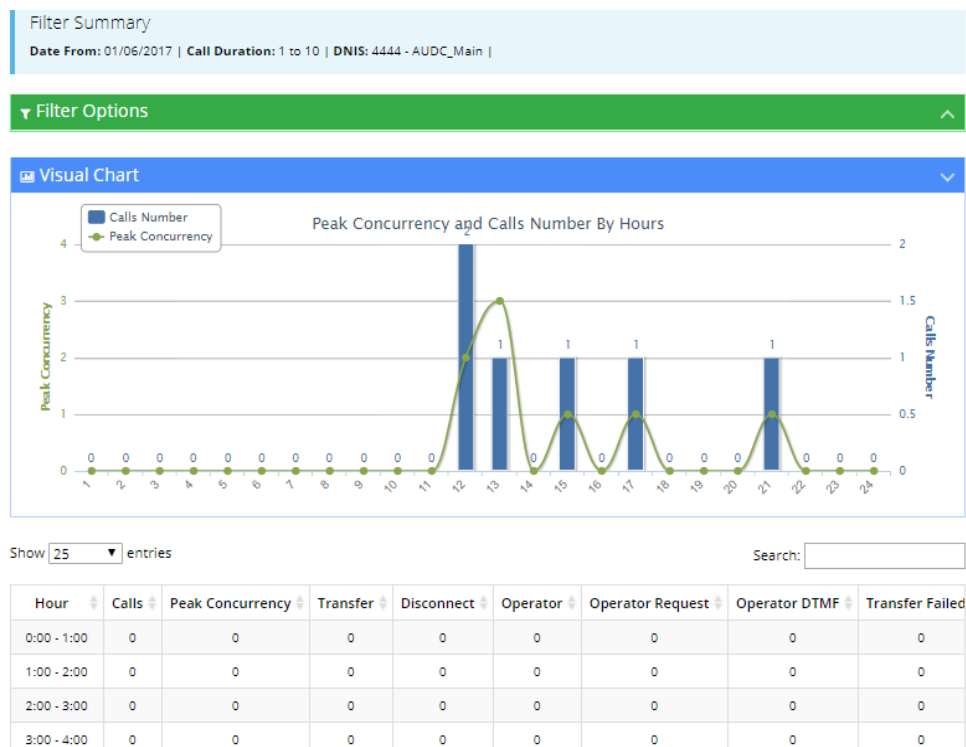
≡ Action Hour

Filter Options

User	<input type="text"/>
Date	<input type="text" value="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:
 - Generate to view the report output.
 - Export CSV to export the report in CSV format.
 - Reset Filter to reset the filter values.

Figure 6-26: Action Hour App Report Example**Table 6-7: Action Hour App Report Descriptions**

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

Action Usage Report

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

The Action Usage Report is available only for Provider privileges.

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

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

Figure 6-27: Action Usage App Filter Options

App Reports

≡ Action Usage

Filter Options

Customer	Any	x
Date From		
Date To		
Disposition	Any	
OS Type	Any	

Generate 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



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

Figure 7-2: Add New Prompt

New Prompt

≡ Prompt Details

File Name*

File Description*

File Upload/Record* ☒ Upload ☐ Record

No file chosen

3. Enter the prompt details in the fields provided.

Figure 7-3: New Prompt Details

New Prompt

≡ Prompt Details

File Name*

File Description*

File Upload/Record* ☒ Upload ☐ Record

No file chosen

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

➤ **To upload a file:**

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

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

➤ **To record a file:**

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

Figure 7-4: Record New Prompt Details

New Prompt

≡ Prompt Details

File Name*

aa

File Description*

aa

File Upload/Record*

☐ Upload
 ☒ Record

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.

Configuring Flow Settings

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

➤ To view Flow settings:

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

Figure 7-5: Call Flow Settings

Flow Settings

≡ Flow Settings Details

+ Add New

⚙ Actions

Show 100 entries

Search:

	DNIS Number	DNIS Name	Working Hour Set	Employees Working Hours Menu	Employees Non-Working Hours Menu	Non-Employees Working Hours Menu
<input type="checkbox"/>	4983	AUDC_Phone	Default	Default Speech Menu	Default Speech Menu	Default Speech Menu
<input type="checkbox"/>	6666		Default	Default Speech Branch Menu	Default Speech Branch Menu	Default Speech Branch Menu

Showing 1 to 2 of 2 entries

<

1

>

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.
- **Working Hour Set:** Defines which working hour set will be used to define the working/non-working days/time for the flow.

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

Adding a Flow Setting

The procedure below describes how to add a flow setting.

➤ To add a Flow setting:

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

Figure 7-6: Add New Flow Settings

New Flow Settings

☰ New Flow Settings - Step 1 of 2

1 Flow Settings Details 2 Confirm

Provide Flow Settings Details

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 Hours Menu*

Continue ➔

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

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

New Flow Settings

≡ New Flow Settings - Step 2 of 2

1 ✓ Flow Settings Details 2 Confirm

Confirm Information

DNIS Number: 1234

DNIS Name: Test

Working Hour Set: Default

Employees Working Hours Menu: speech

Employees Non-Working Hours Menu: speech

Non-Employees Working Hours Menu: DTMF to Menu

Non-Employees Non-Working Hours Menu: DTMF to Menu

⏪ Back Save Information ⏩

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

Flow Settings

≡ Flow Settings Details

+ Add New ⚙ Actions

Show 100 entries

✎ Edit Flow Settings
🗑 Delete Flow Settings

<input type="checkbox"/>	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 Hours Menu
<input type="checkbox"/>	+5437653545466356876473+	asdfasdf	hg/hg	medic - contact	DTMF to Menu	Erez2	DTMF to Menu
<input type="checkbox"/>	45456456454	test 2.11.00	Default	ErezDtmf	ErezDtmf	Erez1	Erez2
<input type="checkbox"/>	4990	tets2	Default	DTMF to Menu	DTMF to Menu	DTMF to Menu	DTMF to Menu
<input checked="" type="checkbox"/>	56789	הגההגה	hg/hg	speech	speech	speech	speech

Showing 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

Flow Settings

Flow Settings Details

Show 100 entries

+ Add New Actions

Edit Flow Settings

Delete Flow 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 Hours Menu
+5437653545466356876473+	asdfasdf	hg/hg	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	הגדרות	hg/hg	speech	speech	speech	speech

Showing 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**.
3. The following message appears: "Are you sure you want to delete the selected flow settings?"
4. Click **OK** to delete the selected Flow Setting.

Managing Outgoing Rules

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

➤ To create a new outgoing rule:

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

Figure 7-10: New Outgoing Rule

New Outgoing Rule

≡ New Outgoing Rule - Step 1 of 2

1 Rule Details 2 Confirm

General Details

Rule Name *

Dialed Number Condition

The number is between * -

and the prefix is

Dialed Number Manipulation

Trim digits from the number prefix and then

prepend to the number

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

Figure 7-11: New Outgoing Rule Save Information

New Outgoing Rule

≡ New Outgoing Rule - Step 2 of 2

1 ✓ Rule Details 2 Confirm

Confirm Information

General Details

Rule Name: gg

Dialed Number Condition

The number is between: 1 - 3
and the prefix is: 100

Dialed Number Manipulation

Trim: 1 digits from the number prefix and then
prepend: 2 to the number

⏪ Back Save Information ➡

8. Click **Save Information**.

Configuring Menu Settings

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

- Speech Menu
- DTMF Menu

Adding a Speech Menu

The procedure below describes how to add a Speech menu. There are two types of Speech menus:

- VocaNOM IVR
- VocaNOM Branch

Adding a VocaNOM IVR Speech Menu

The procedure below describes how to add a VocaNOM IVR speech menu.

➤ To add a VocaNOM IVR speech menu:

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

Figure 7-12: Menu Settings Example

Menu Settings

Menu Settings Details				+ New Speech Menu	+ New DTMF Menu	⚙ Actions
Show 100 entries				Search:		
<input type="checkbox"/>	Menu Name	Menu Type	Script Type	Language		
<input type="checkbox"/>	Default Speech Branch Menu	Speech	VOCABranch	HE-IL		
<input type="checkbox"/>	Default Speech Menu	Speech	VOCANom	HE-IL		
Showing 1 to 2 of 2 entries				< 1 >		

- Click **+ New Speech Menu**; the following screen appears:

Figure 7-13: Add New Speech Menu Settings

New Menu Settings

New Menu Settings - Step 1 of 2

1 Menu Settings Details 2 Confirm

General Settings

Menu Name*

Script Type* VOCANom IVR

Dialect HE-IL

Dictionaries

First Dictionary Contact

Second Dictionary None

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 Last Name - Departments only

no. of questions 3

Opening Question Default

Second Question Default

Third Question Default

Play Phone Device Type When Transferring Always

- Under the General Settings group, in the 'Menu Name' field, enter a Speech Menu Name.
- From the 'Script Type' drop-down list, select **VocaNOM IVR**.
- For a customer/tenant to use the Secondary Language fields:
 - From the 'Dialect' drop-down list, select **HE-IL**.
 - Select the 'Ena/Dis' check box.

- c. From the Language drop-down list, select "English US".
- d. Select the DTMF.
- e. The **Behavior** field has the following options:
 - ◆ **Operator:** The call is diverted to the operator.
 - ◆ **Flow:** Deprecated
 - ◆ **Go to menu:** The call is diverted to another menu (see figure below).

Figure 7-14: New Menu Settings – VocaNOM IVR

Figure 7-15: Go to Menu – VocaNOM IVR

6. 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.

Figure 7-16: Dictionaries – First Dictionary

Figure 7-17: Dictionaries – Second Dictionary

New Menu Settings

≡ New Menu Settings - Step 1 of 2

1 Menu Settings Details

General Settings

Menu Name*

Script Type* VOCANom IVR ▼

Dictionaries

first Dictionary Contact ▼

second Dictionary

- None
- None
- Contact
- Department - Default

Prompts Settings

Play time of day None ▼

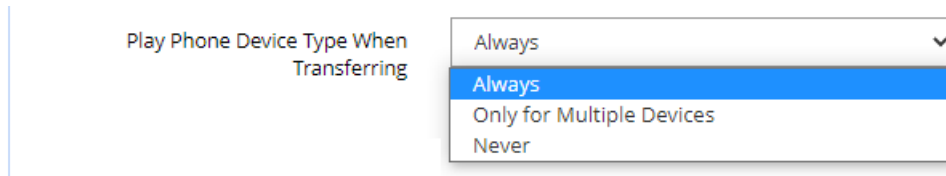
7. The **Prompts Settings** fields allow you to play appropriate prompts to one of the following groups:

- None
- Anonymous
- Employees
- All

These can be selected from the different drop-down lists:

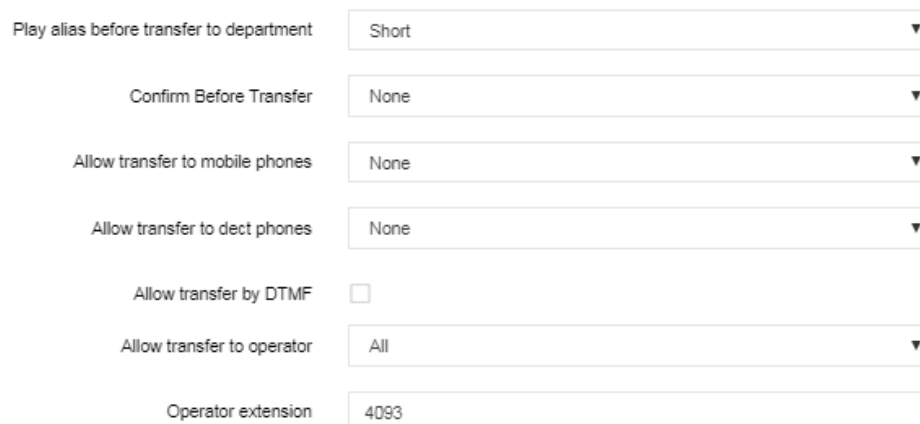
- From the 'Play time of day' drop-down list, select which group you are playing the time system menu prompts.
- From the 'Play short prompt for' drop-down list, select which group you are playing the short prompt to.
- From the 'Play Gling at the end of the prompt' drop-down list, select which group you are playing this to.
- From the 'Play the extension number' drop-down list, select which group you are playing this to.
- From the 'Play the mobile number' drop-down list, select which group you are playing this to.
- From the 'Play only number prompt' drop-down list, select which group you are playing this to.
- From the 'Play question prompts with' drop-down list, select which group you are playing this to: Contacts only, Contacts and Departments, Departments only.
- In the 'No. of questions' drop-down list, enter the number of questions to be asked (1 to 3). This determines how many questions will be asked (Opening/second/third questions).

- From the 'Opening Question' drop-down list, select "Default" or any other pre-recorded prompt.
- From the 'Second Question' drop-down list, 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.



- ◆ **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.

Additional Settings



- From the 'Play alias before transfer to department' drop-down list, 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.

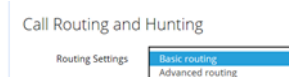
- **Long:** If the alias was recognized, the system plays the recognized alias and the department name before the transfer.
If there is disambiguation between departments, the alias is played before playing the disambiguation options.
 - **Disabled:** Plays only the department name before the transfer. If there is disambiguation, only disambiguation options are played.
9. From the 'Confirm Before Transfer' field, select which group you are playing this to. If not 'None', the relevant group will be asked to confirm the entity they are going to be transferred to.
 10. From the 'Allow transfer to mobiles' drop-down list, select which group you are allowing to transfer calls to mobile devices.
 11. From the 'Allow transfer to DECT phones' drop-down list, select which group you are allowing to transfer calls to DECT phones.
 12. In the 'Allow Transfer by DTMF' field, select this check box if you want to transfer by DTMF. Instead of saying a contact/department name, the user can enter the entity phone number by DTMF:
 - Minimum length of extension number
 - Maximum length of extension number
 13. From the 'Allow transfer to operator for' drop-down list, select to whom you are allowing to transfer calls to the operator.
 14. In the 'Operator extension' field, enter the number to dial when the user presses "0" or says "operator". This 'Operator extension' 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' field is mandatory.

15. From the 'Call Routing and Hunting' drop-down list, select either:
 - Basic routing
 - Advanced routing

Figure 7-18: Call Routing and Hunting - Basic



- a. **Basic routing (default)** - The call routing process remains as it is currently set

Figure 7-19: Call Routing and Hunting - Advanced

Call Routing and Hunting

Routing Settings

- Basic routing
- Advanced routing**

Prompt Before Transfer: select prompt

No Answer Timeout (0-120 secs): 10

When no Phone Type is Provided (Contacts only): Ask for phone type

Actions When Remote Party is not Reachable

Action 1: Do nothing

Data:

b. Advanced routing -The call is set according to the following parameters:

- ◆ **Prompt Before Transfer:** The user will be able to select a prompt from a list of available prompts, before the call is transferred.
- ◆ **No answer timeout (0-120 secs):** Sets the time the system waits 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.
- ◆ **When no Phone Type is Provided:** 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 will ask the caller to choose a Phone Type it will play 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 system will transfer the call 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. There is an option to configure on which state the system should perform the hunting (Busy, No Answer or other).

Figure 7-20: When no Phone Type is Provided

When no Phone Type is Provided (Contacts only)

Route by phone type priority and h

Phone Type Priority: Office, Mobile

Hunt on No Answer: ☒

Hunt on Busy (486): ☒

Hunt on Other States (4xx, 5xx, 6xx): ☒

Actions When Remote Party is not Reachable

Action 1: Go to menu

Data:

- **Actions when Remote Party is not Reachable:** 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 case, the system will perform pre-defined actions:

- Do nothing

- Play prompt
- Go to menu
- Transfer to Operator
- Disconnect
- Transfer to Phone
- Send SMS

Figure 7-21: Actions when Remote Party is not Reachable

Call Routing and Hunting

Routing Settings: Advanced routing

Prompt Before Transfer: select prompt

No Answer Timeout (0-120 secs): 10

When no Phone Type is Provided (Contacts only): Ask for phone type

Actions When Remote Party is not Reachable

Action 1: Do nothing, Play prompt, Go to menu, Transfer to Operator, Disconnect, Transfer to Phone, Send SMS

Working Hours

Activate Non-Working Hours Behavior

Continue

■ If you select the 'Activate Non-Working Hours Behavior' field, 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 to those not defines in 'Allow System Use'.

Figure 7-22: Add New Speech Menu Settings - Working Hours

Working Hours

Activate Non-Working Hours Behavior: ☒

Play Unavailable Prompt: None

Allow System Use: None

Other: Disconnect

1. Click **Continue**.

Adding a VocaNOM Branch Speech Menu

➤ To add a VocaNOM Branch Speech menu:

1. Open the Menu Settings screen (**Configuration > Menu Settings**).
2. Under the General Settings group, in the 'Menu Name' field, enter a Speech Menu Name.
3. From the 'Script Type' drop-down list, select VocaNOM Branch.

Figure 7-23: New Menu Settings - VocaNOM Branch

New Menu Settings

New Menu Settings - Step 1 of 2

1 Menu Settings Details

General Settings

Menu Name *

Script Type *

VOCANom Branch ▼

Prompts Settings

Play time of day
☐

Advertisement
☐

no. of questions

3 ▼

Opening Question

Default ▼

Second Question

Default ▼

Third Question

Default ▼

Play recognized city before transfer
☒

Additional Settings

Save callers last choice
☐

Confirm Before Transfer
☐

Allow transfer to operator
☐

Continue

4. Enable the 'Play time of day' check box for the system to play the time period of the day (e.g., Good morning, Good afternoon).
5. Enable the 'Advertisement' check box for the system to play an advertisement (e.g., company's jingle, announcement for a new product, etc.).
6. In the 'No. of questions' field, enter the number of questions to be asked (1 to 3). This determine how many questions will be asked (Opening/second/third questions).
7. From the 'Opening Question' field, select "Default" or any other pre-recorded prompt.
8. From the 'Second Question' field, select "Default" or any other pre-recorded prompt.
9. From the 'Third Question' field, select "Default" or any other pre-recorded prompt.
10. Enable the 'Play recognized city before transfer' check box to repeat the city requested before transfer. In case of branch disambiguation, the requested city is played before playing disambiguation options.
11. Enable the 'Save caller last choice' check box to automatically transfer the call to the previously requested destination.
12. Enable the 'Confirm Before Transfer' check box to ask the caller to confirm the destination before the call is transferred.
13. Enable the 'Allow transfer to operator' check box to allow the system to transfer calls to operator (as defined in the 'Operator extension' destination).
14. In the 'Operator extension' field enter the operator's phone number. This field appears only if the 'Allow transfer to operator' field is enabled.

Adding a DTMF Menu

The procedure below describes how to add a DTMF menu.

➤ To add a DTMF menu:

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

Figure 7-24: Menu Settings Example

Menu Settings

Menu Settings Details
+ New Speech Menu
+ New DTMF Menu
⚙ Actions

Show entries
Search:

<input type="checkbox"/> Menu Name	Menu Type	Script Type	Language
<input type="checkbox"/> Default: Speech Branch Menu	Speech	VOCABranch	HE-IL
<input type="checkbox"/> Default: Speech Menu	Speech	VOCANom	HE-IL

Showing 1 to 2 of 2 entries

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

Figure 7-25: New DTMF Menu Settings

New Menu Settings - Step 1 of 2

1 Menu Settings Details

General Settings

Menu Name*

Menu Prompt*

Menu Dialect*

Max Wait Time (0-30 secs)*

Max Tries (1-7)*

Allow transfer to operator

Operator Extension Working Hours

Operator Extension Non-Working Hours

Timeout Prompt

Actions Settings

Key	Action 1	Action 1 Data	Action 2	Action 2 Data	Action 3	Action 3 Data
0	Do nothing					
1	Do nothing					
	Play prompt					
2	Go to menu					
	Transfer to Operator					
3	Collect and Dial					
	Disconnect					
4	Transfer to Phone					
	Silent Transfer to Phone					
5	Do nothing					
6	Do nothing					
7	Do nothing					
8	Do nothing					
9	Do nothing					
*	Do nothing					
#	Do nothing					
Error	Do nothing					

[Continue \(5\)](#)

- From the 'Menu Prompt' drop-down list, select the pre-configured prompt. See [Adding a Voice Prompt](#) on page 127 for more information.
- From the 'Menu Dialect' drop-down list, select the language of the prompts. The system plays the prompts according to the menu dialect selected.
- In the 'Max Wait Time' field, enter how much time to wait in seconds (0-30) until the user presses the DTMF.
- 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.

1. 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.

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

Figure 7-26: Write SMS



Write SMS

Characters: 0/459 Parts: 0/3

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.

Editing Menu Settings

➤ To edit menu settings:

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

Figure 7-27: Select Menu Settings - Edit

Menu Settings

Menu Settings Details					+ Add New	⚙ Actions ▾
Show 100 ▾ entries		Search			Edit Menu Delete Menu	
<input type="checkbox"/>	Menu Name	Menu Type	Script Type	Language		
<input type="checkbox"/>	Default Speech Branch Menu	Speech	VOCABranch	HE-IL		
<input checked="" type="checkbox"/>	Default Speech Menu	Speech	VOCANom	HE-IL		
Showing 1 to 2 of 2 entries					< 1 >	

3. Select **Edit Menu**.
4. Edit the fields you want to change.
5. Click **Continue**.
6. 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 7-28: Select Menu Settings

Menu Settings

Menu Name	Menu Type	Script Type	Language
Default Speech Branch Menu	Speech	VOCABranch	HE-IL
Default Speech Menu	Speech	VOCANom	HE-IL

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.

Defining Working Hours

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

Adding Working Hour Set

➤ To add a new working hours set:

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

Figure 7-29: Add Working Hours Set

Working Hour Set	Default	UseWorkingTime
Working Hour Set		
Default		

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

Figure 7-30: Add Working Hours Set

New Working Hours

≡ Working Hours Details

Name

Week Day	Start Hour	End Hour	Working Day
Sunday	00:00 ▼	00:00 ▼	<input type="checkbox"/>
Monday	00:00 ▼	00:00 ▼	<input type="checkbox"/>
Tuesday	00:00 ▼	00:00 ▼	<input type="checkbox"/>
Wednesday	00:00 ▼	00:00 ▼	<input type="checkbox"/>
Thursday	00:00 ▼	00:00 ▼	<input type="checkbox"/>
Friday	00:00 ▼	00:00 ▼	<input type="checkbox"/>
Saturday	00:00 ▼	00:00 ▼	<input type="checkbox"/>

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

Figure 7-31: Edit Working Hours Details

Edit Working Hours

≡ Working Hours Details

Week Day	Start Hour	End Hour	Working Day
Sunday	01:00 ▼	01:00 ▼	<input type="checkbox"/>
Monday	08:00 ▼	17:00 ▼	<input checked="" type="checkbox"/>
Tuesday	08:00 ▼	17:00 ▼	<input checked="" type="checkbox"/>
Wednesday	08:00 ▼	17:00 ▼	<input checked="" type="checkbox"/>
Thursday	08:00 ▼	17:00 ▼	<input checked="" type="checkbox"/>
Friday	08:00 ▼	17:00 ▼	<input checked="" type="checkbox"/>
Saturday	01:00 ▼	01:00 ▼	<input type="checkbox"/>

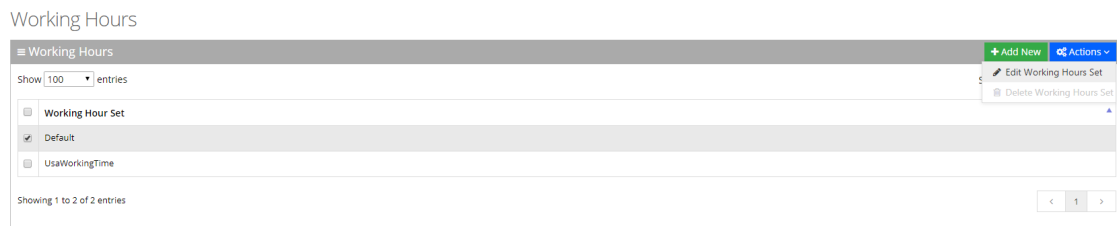
Save Changes

Editing Working Hour Set

1. Select the working hour that you wish to edit.

2. Click **Actions**; the following screen appears.

Figure 7-32: Edit Working Hours Set

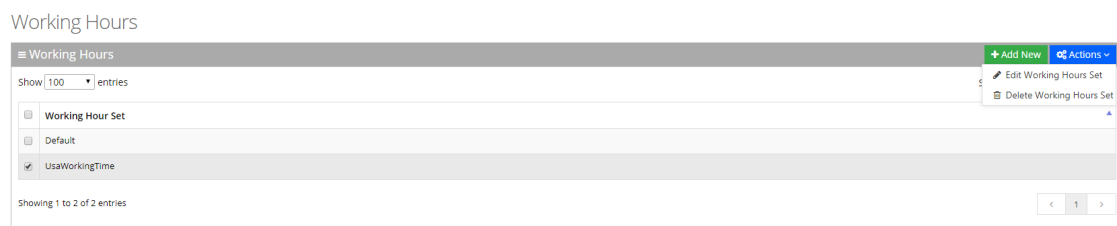


3. Select the **Edit Working Hours Set Menu**.
4. Edit the working days and hours, by selecting the check box of each appropriate working day.
5. Edit the 'Start Hour' and 'End Hour' for each applicable day.
6. Click **Save Changes**.

Deleting Working Hours Set

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

Figure 7-33: Deleting Working Hours Set



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

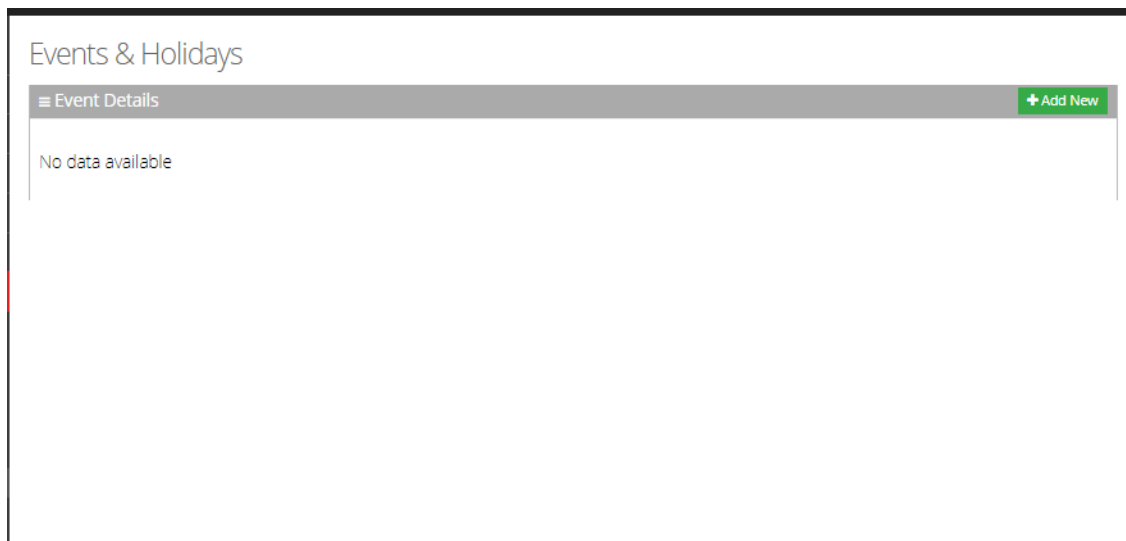
Defining Events and Holidays

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

Adding Events and Holidays

➤ To add events and holidays:

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

Figure 7-34: Events and Holidays

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

Figure 7-35: Provide Event Details

New Event

New Event - Step 1 of 2

1 Event Details 2 Confirm

Provide Event Details

Event Title*

Event Type* Corporate ▼

Event Start*

Event End*

Continue

3. Enter the event details.

Event Type can either be "Corporate" or "Holiday".

Figure 7-36: Provide Event Details Example

New Event

New Event - Step 1 of 2

1 Event Details 2 Confirm

Provide Event Details

Event Title* Company Fun Day

Event Type* Corporate ▼

Event Start* 01/03/2018

Event End* 01/03/2018

Continue

4. Click **Continue**.

Figure 7-37: Confirm Information

New Event

New Event - Step 2 of 2

1 ✓ Event Details 2 Confirm

Confirm Information

Event Title: Company Fun Day
 Event Type: Corporate
 Event Start: 01/03/2018
 Event End: 01/03/2018

Back Save Information

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

Figure 7-38: Add Event Successfully Updated

Events & Holidays

Event Details

+ Add New Actions

Show 100 entries

Search

Event Title	Event Type	Event Start	Event End
Company Fun Day	Corporate	01/03/2018 00:00	01/03/2018 00:00

Showing 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 7-39: Edit Events and Holidays

Events & Holidays

Event Details

+ Add New Actions

Show 100 entries

Search

Event Title	Event Type	Event Start	Event End
Company Fun Day	Corporate	01/03/2018 00:00	01/03/2018 00:00

Showing 1 to 1 of 1 entries

1

3. Select **Edit Event**.

Figure 7-40: Provide Event Details

Edit Event

■ Edit Event - Step 1 of 2

1 Event Details 2 Confirm

Provide Event Details

Event Title* Company Fun Day

Event Type* Corporate

Event Start* 01/03/2018

Event End* 02/03/2018

Continue

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

Figure 7-41: Confirm Edit Information

Edit Event

■ Edit Event - Step 2 of 2

1 Event Details 2 Confirm

Confirm Information

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 7-42: Edit Event Successfully Updated

Events & Holidays

Event Details + Add New Actions

Show 100 entries Search

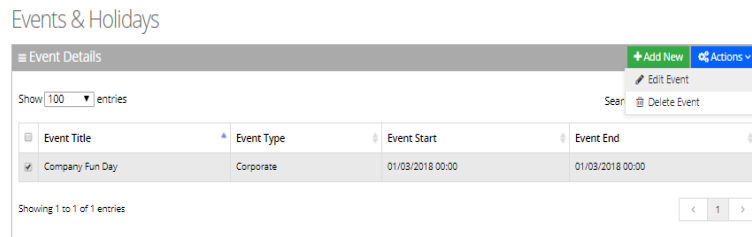
Event Title	Event Type	Event Start	Event End
Company Fun Day	Corporate	01/03/2018 00:00	02/03/2018 00:00

Showing 1 to 1 of 1 entries

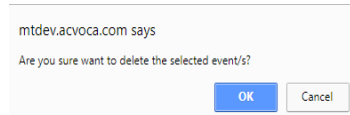
Event successfully updated!

Delete Events and Holidays

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

Figure 7-43: Edit Events and Holidays

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

Figure 7-44: Want to Delete?

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

Figure 7-45: Event Successfully Deleted

Defining Additional Employees

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

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

➤ To define the additional employees:

1. Open the Additional Employees Details screen (**Configuration > Additional Employees**).
2. Click **Add New**; the following screen appears:

Figure 7-46: New Employee Details

New Employee

≡ New Employee - Step 1 of 2

1 Employee Details 2 Confirm

Provide Contact Details

First Name	Last Name	Extension / Office	Mobile

+ More Contacts

Continue

3. Under the **Provide Contact Details** group, enter the following:

- First Name
- Last Name
- Extension/Office
- Mobile

4. Click **Continue**.

Figure 7-47: New Employee Information

New Employee

≡ New Employee - Step 2 of 2

1 Employee Details

Confirm Information

Contacts:	First Name	Last Name	Extension / Office	Mobile
	Peter	Morris	4490	012-345678

Back Save Information

5. Click **Save Information**.

Configuring System Settings

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

➤ To configure the CLI:

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

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

Figure 7-48: System Settings

The screenshot shows the 'System Settings' configuration page, Step 1 of 2. At the top, a blue header bar reads 'System Settings - Step 1 of 2'. Below this, a progress bar shows two steps: '1 System Settings' (active, green circle) and '2 Confirm' (inactive, grey circle). The main content area is titled 'System Settings' and contains the text 'CLI under 6 is considered an Employee.' with a text input field containing the number '6'. At the bottom, there is a blue 'Continue' button with a right-pointing arrow.

3. Click **Continue**.

Figure 7-49: System Settings - Confirm Information

The screenshot shows the 'System Settings - Confirm Information' page, Step 2 of 2. At the top, a blue header bar reads 'System Settings - Step 2 of 2'. Below this, a progress bar shows two steps: '1 System Settings' (inactive, orange circle) and '2 Confirm' (active, green circle). The main content area is titled 'Confirm Information' and contains the text 'CLI under 6 is considered an Employee.' At the bottom, there are two buttons: a grey 'Back' button with a left-pointing arrow and a green 'Save Information' button with a right-pointing arrow.

4. Click **Save Information**.

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 165.

➤ **To configure LDAP:**

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

Figure 7-50: LDAP Settings

The screenshot shows the 'LDAP Settings' header. Below it, there is a label 'enabled' followed by an unchecked checkbox. At the bottom right, there is a blue button labeled 'Save Changes'.

2. Select the 'enabled' check box.

Figure 7-51: LDAP Settings - Save Changes

The screenshot shows the 'LDAP Settings' screen with the 'enabled' checkbox checked. The 'LDAP Connection' section includes fields for Server, port (389), LDAP Version (Default), User, Password, baseDN, Filter Usage (Append to default), Filter, and Encoding (Default). A 'Check LDAP connection' button is below these fields. The 'LDAP User Attributes' section lists attributes: UniqueID (objectGUID), First Name (givenName), Last Name (sn), Extension (telephoneNumber), Mobile (mobile), Department (department), and Email (mail). The 'Import Schedule' section shows days (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday) with checkboxes, and a 'Start time not before' field set to 23:00. The 'VocaNOM Connection' section has an 'Incremental Mode' checkbox. The 'Email Notification' section has a 'Send on' dropdown set to 'None'. At the bottom, there are 'Import Now' and 'Save Changes' buttons.

3. Enter the following fields for LDAP Connection settings:

- **Server:** Defines the URL of the VocaNOM server. It can include either FQDN or an IP address.
- **Port:** Defines the port of the URL – either '80' for HTTP or '443' for HTTPS.
- **LDAP Version:** Defines the LDAP version number - Default, 2 or 3

- **User:** Defines the Service Administrator name.
- **Password:** Defines the Service Administrator password.
- **baseDN:** Defines the Base DN.
- **Filter Usage:** Append to Default, Replace Default
- **Filter:** Used for filter configuration. Go to <https://www.ldapexplorer.com/en/manual/109010000-ldap-filter-syntax.htm>.
- **Encoding:** This is the character encoding to be used when importing from the LDAP filter



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

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

8. Click **Save Changes**.
9. (Optional) Click **Import Now** to import contacts from the LDAP server immediately.

8 Sending a VocaNOM App Invitation

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

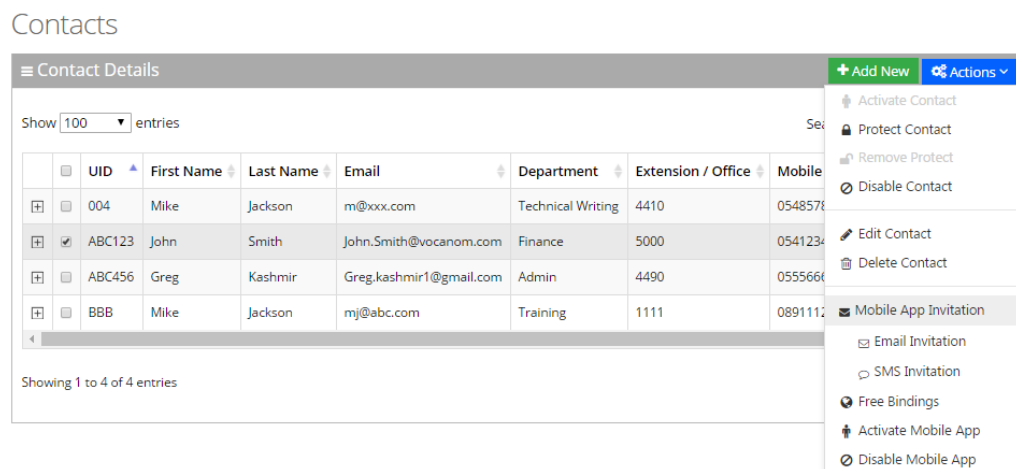
- Email
- SMS

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

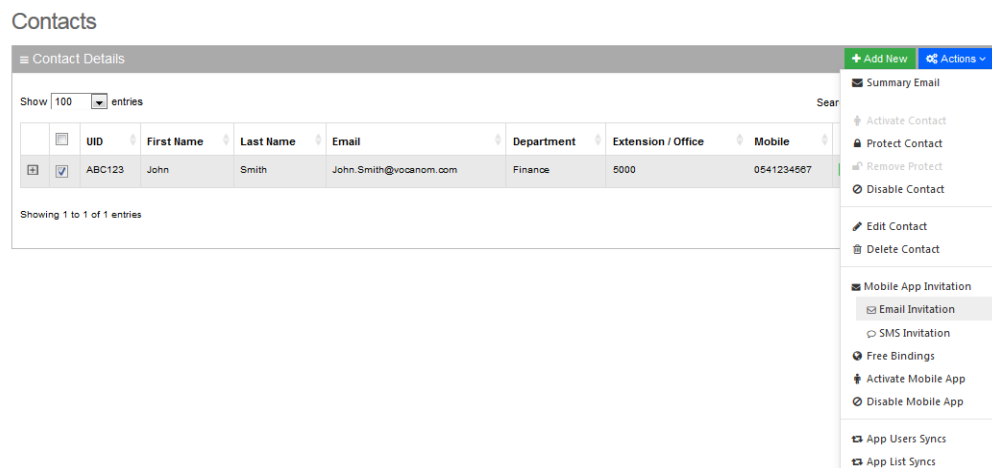
➤ To send an VocaNOM App invitation:

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

Figure 8-1: Mobile App Invitation



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

Figure 8-2: Contacts Activation – Email Invitation

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

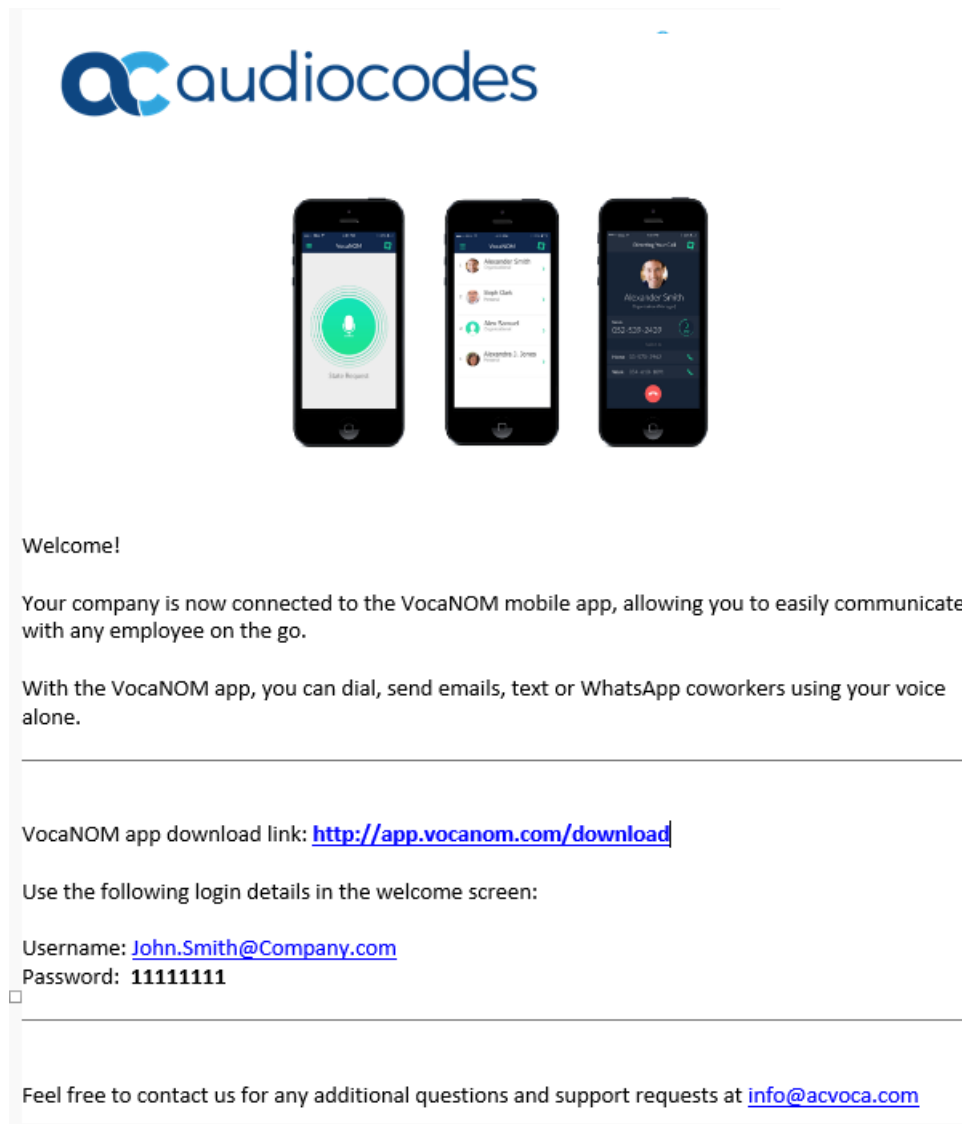
6. A System Notification message is displayed informing you that the invitation was sent to the user.

Downloading VocaNOM App from Email Invitation

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

➤ To download VocaNOM app from an email invitation:

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

Figure 8-3: Downloading VocaNOM from Email

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

Downloading VocaNOM App from SMS Invitation

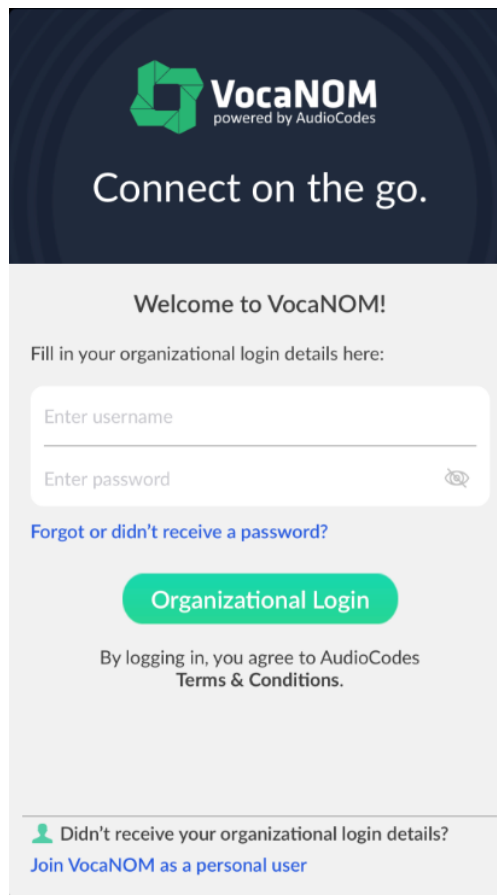
The procedure below describes the steps to download the VocaNOM app from an SMS invitation to your mobile device.

➤ To download the VocaNOM app from an SMS invitation:

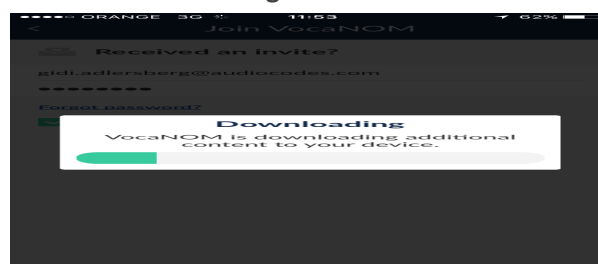
1. Open the SMS on your mobile device; the following screen appears:

Figure 8-4: Downloading VocaNOM from SMS

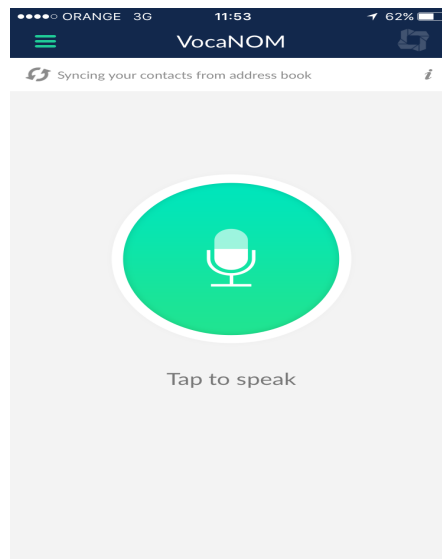
2. Click <https://app.vocanome.com/download> link.
3. After downloading, open the VocaNOM app; the following screen appears on the mobile device:

Figure 8-5: Welcome to VocaNOM

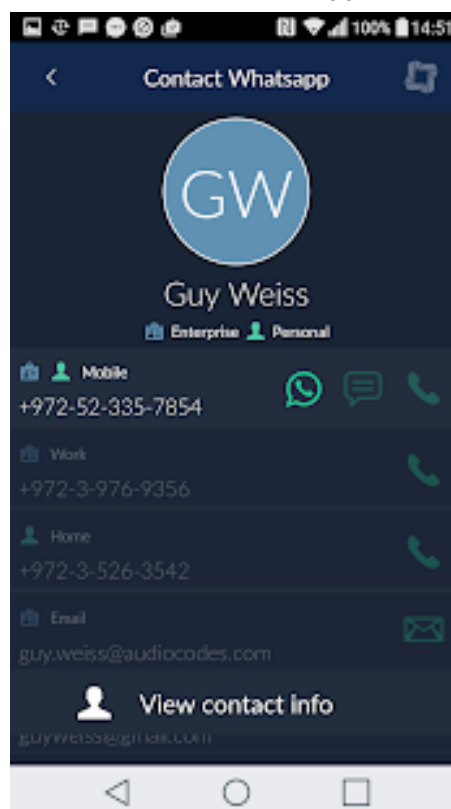
4. Enter the username and password you received in Step [Open the SMS on your mobile device; the following screen appears](#): on page 161 above; and then tap Organizational Login.
5. The VocaNOM package downloads to your mobile device; the following screen appears:

Figure 8-6: Downloading Additional Content

6. The VocaNOM app is now ready for use.
7. Tap the green circle on your screen and say the Contact's first and last name from your private or Enterprise Contact List.

Figure 8-7: Tap to Speak

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

Figure 8-8: Contact WhatsApp

9 Configuring Voca LDAP Synchronization

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

LDAP Client Requirements

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

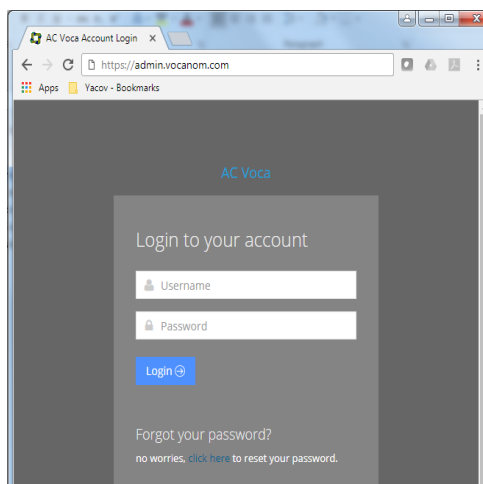
Hardware and Operating System Requirements

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

Network Requirements

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

Figure 9-1: Login to your Account



LDAP Synchronization Requirements

Customers need to provide the following information:

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

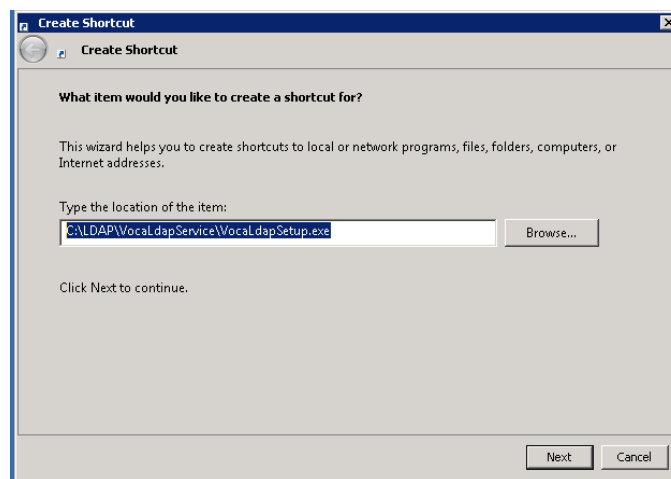
Running the LDAP Client Setup in Voca Cloud

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

➤ **To run the LDAP client in Voca Cloud mode**

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

Figure 9-2: Create Shortcut



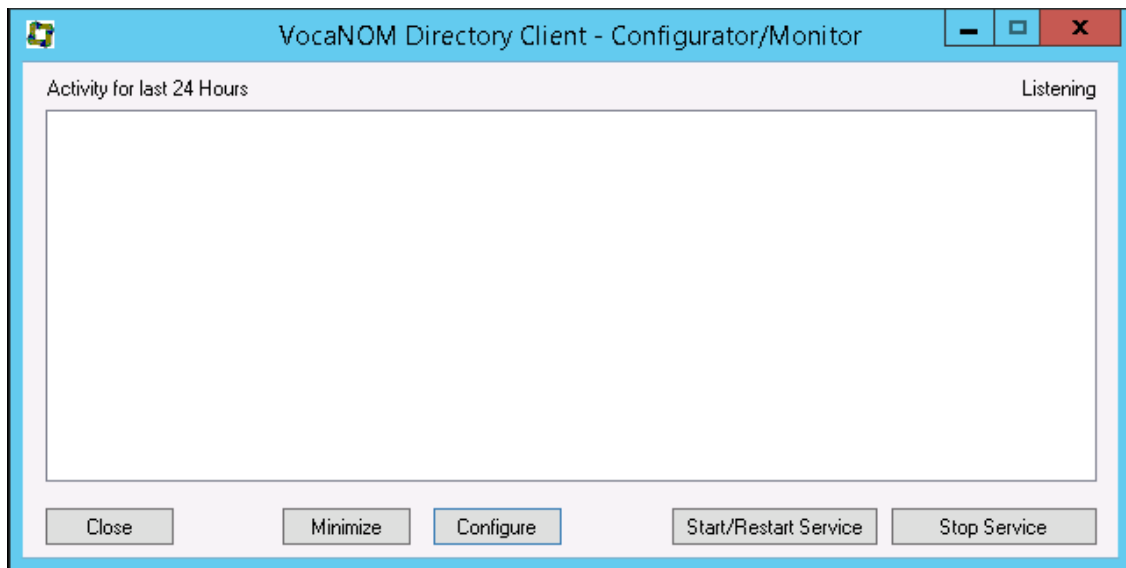
Configuring the LDAP Client

The procedure below describes how to configure the LDAP client.

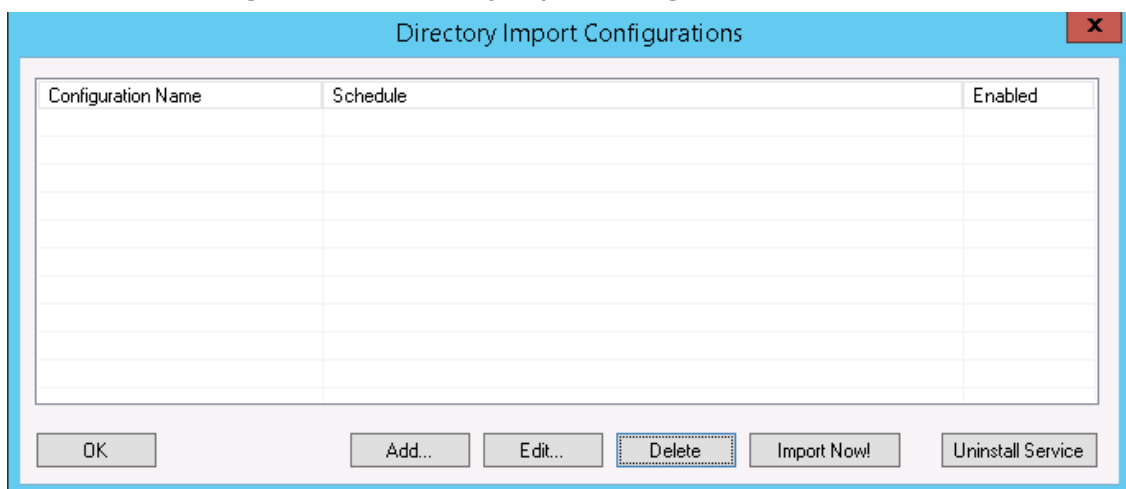
Setting up LDAP Client Synchronization

➤ **To run the LDAP Client Synchronization Setup**

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

Figure 9-3: Configurator/Monitor

The following screen appears.

Figure 9-4: Directory Import Configuration

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

Entering Fields under LDAP Connection Tab

Enter the following fields under the LDAP Connection tab:

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



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

BaseDN: Defines the Base DN
Filter: See Useful Topics regarding filter configuration
FilterUsage: "2"
Encoding: Default

Figure 9-5: Directory Client Configuration



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

Entering Fields under LDAP User Attributes Tab

Enter the following fields under the LDAP User Attributes tab:

UniqueID: "objectGUID"
FirstName: "givenName"

LastName: "sn"
Extension: "telephoneNumber"
Mobile: "mobile"
Dect: If your organization is using a DECT or WLAN phone, then assign the LDAP field of this phone type.



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

Department: "department"
Email: "mail"

Figure 9-6: Directory Client Configuration

Entering Fields Under VocaNOM Connection Tab

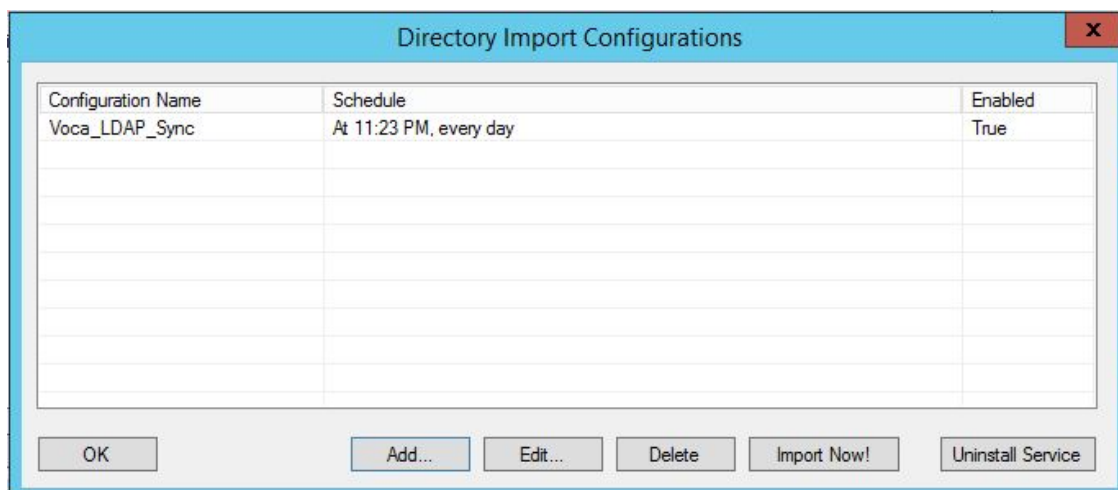
- Enter the following fields under the **VocaNOM Connection** tab:
 - VocaNOM server:** Defines the URL of the VocaNOM server. It can include either FQDN or an IP address.
 - Port:** Defines the port of the URL – either '80' for HTTP or '443' for HTTPS.

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

Figure 9-7: VocaNOM Connection

The screenshot shows the 'VocaNOM Directory Client Configuration' dialog box with the 'VocaNOM Connection' tab selected. The 'Configuration Name' is 'Voca_LDAP_Sync'. The 'Enable' checkbox is checked. The 'LDAP Connection' tab is active, showing fields for 'VocaNOM Server' (http://admin.vocanom.com), 'Port' (80), 'Ignore Certificates' (unchecked), 'User' (admin@vocasystem.com), 'Password' (masked with xxxxxxxx), 'Organization ID' (10101), 'Language' (he-il), and 'Incremental mode' (checked). A note states: '* Use only for OnPrem with self-signed certificate'. The 'OK' and 'Cancel' buttons are at the bottom right.

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

Figure 9-8: Directory Import Configurations

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

Configuring Files in LDAP Client On-premises Mode

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

- Hosts file
- LDAP Client file

Testing LDAP Client Connectivity

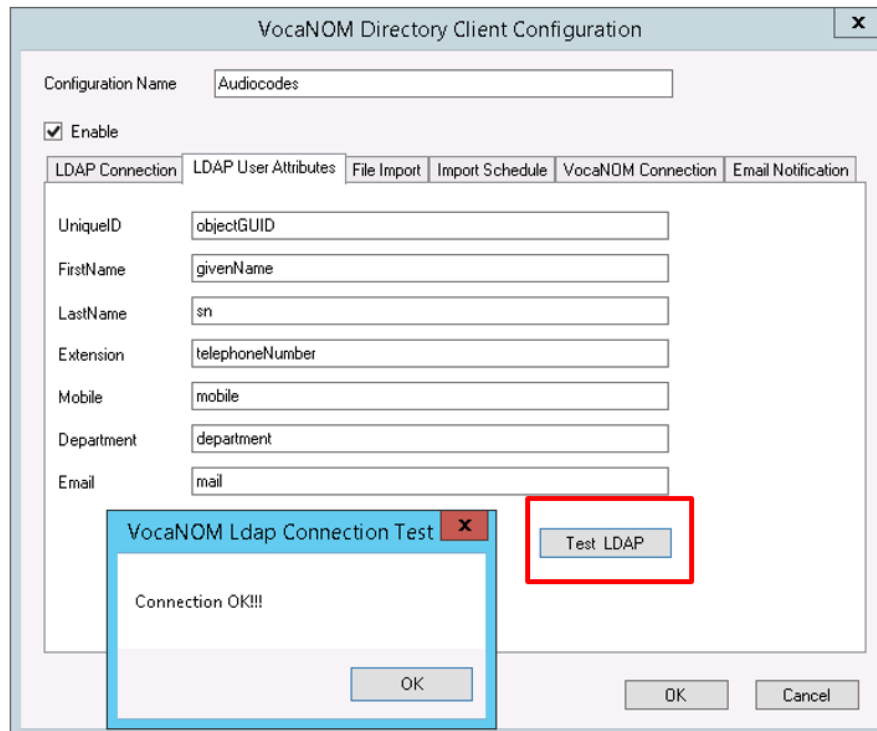
The procedure below describes how to test LDAP connectivity

LDAP Server Connectivity Testing

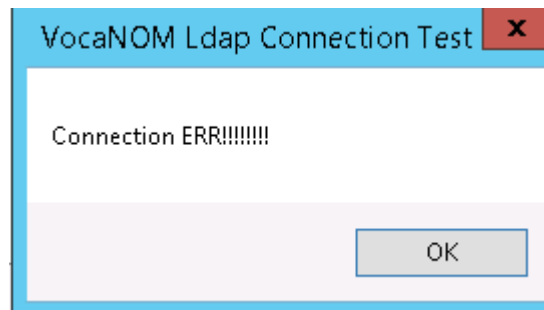
The procedure below describes how to test the LDAP server connection.

➤ To test the LDAP server connection:

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

Figure 9-9: Test LDAP

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

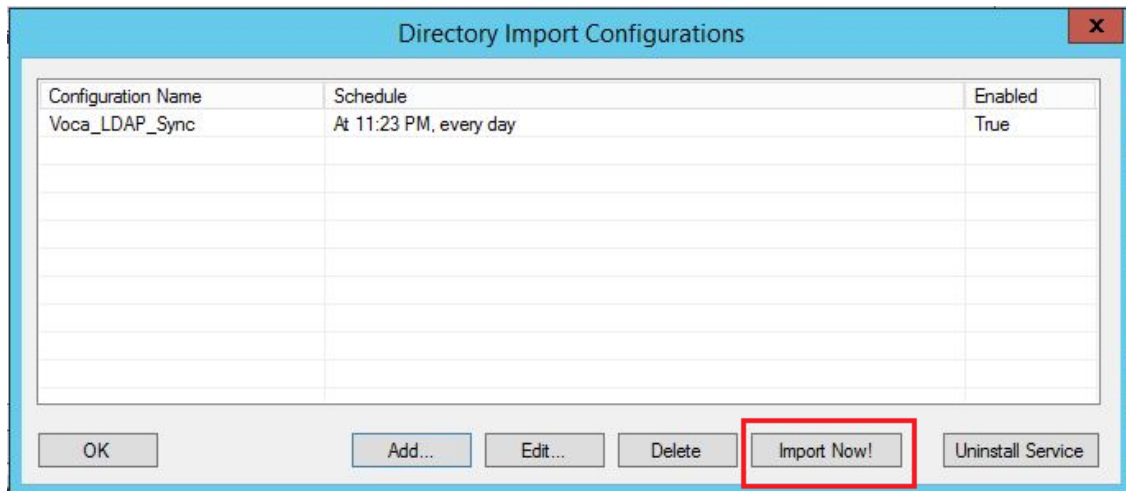
Figure 9-10: Connection ERR!!!

VocaNOM Server Connectivity Testing

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

➤ To test the VocaNOM server connection:

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

Figure 9-11: Import Now

2. Confirm that contacts have been successfully created in the VocaNOM system.
3. If the VocaNOM Cloud system is not synchronized with the customer's LDAP and some errors appear in the `C:\LDAP\VocaLdapService\logs\` log file, see [LDAP Client Does not Connect to the VocaNOM Server](#) on page 175.

Troubleshooting LDAP Client Connectivity

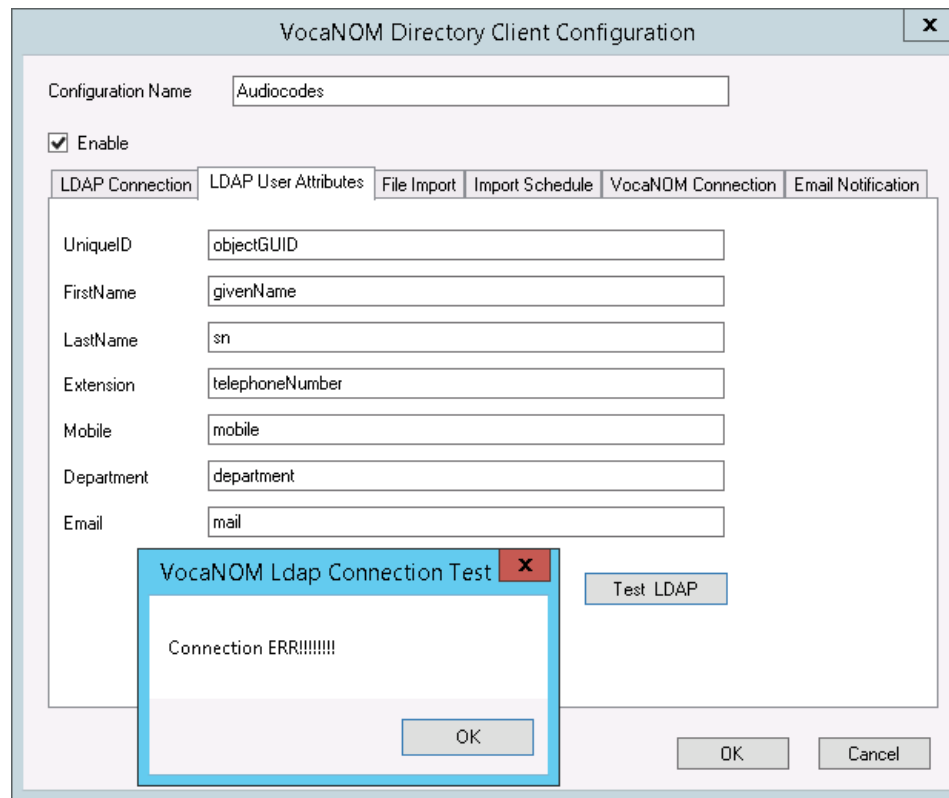
The procedure below describes how to troubleshoot LDAP client connectivity.

Troubleshooting Customer's LDAP Server

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

➤ To troubleshoot the customer's LDAP server:

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

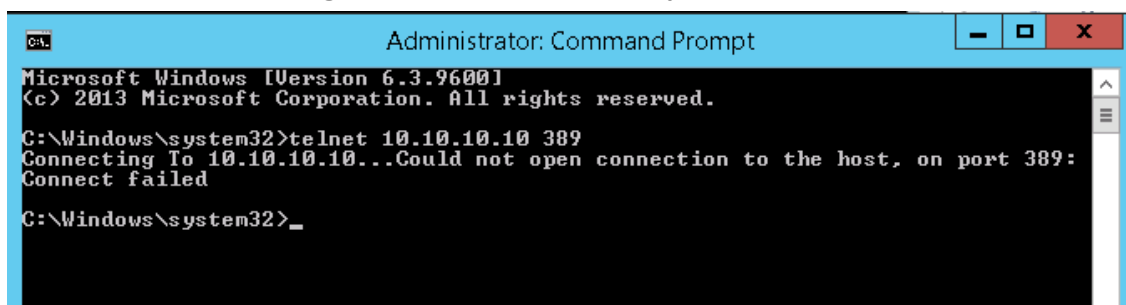
Figure 9-12: Connection ERR!!!

2. Check the `C:\LDAP\VocaLdapService\logs\` log file. If an 'LDAP error' appears, then the LDAP server is not operational.
 - You can also test the Telnet connectivity to the LDAP server by running the following command in the *Command Line* console:

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

For example:

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

Figure 9-13: Command Prompt

- If the LDAP server is not reachable by Telnet, check the network connectivity (firewall, routing and DNS).
3. Check if the following error appears in the `C:\LDAP\VocaLdapService\logs\` log file:

Error LDAP errorThe user name or password

If so:

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

Figure 9-14: User/Password

The screenshot shows the 'VocaNOM Directory Client Configuration' dialog box with the 'LDAP Connection' tab selected. The 'Configuration Name' is 'Voca_LDAP_Sync'. The 'Enable' checkbox is checked. The 'LDAP Connection' tab is active, showing fields for 'VocaNOM Server' (http://admin.vocanom.com), 'Port' (80), 'Ignore Certificates' (unchecked), 'User' (admin@vocasystem.com), 'Password' (masked with xxxxxxxx), 'Organization ID' (10101), 'Language' (he-il), and 'Incremental mode' (checked). A red rectangle highlights the 'User' and 'Password' fields. A note states: '* Use only for OnPrem with self-signed certificate'. The 'OK' and 'Cancel' buttons are at the bottom right.

LDAP Client Does not Connect to the VocaNOM Server

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

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

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

Figure 9-15: VocaNOM Connection

The screenshot shows the 'VocaNOM Directory Client Configuration' dialog box with the 'VocaNOM Connection' tab selected. The configuration name is 'Voca_LDAP_Sync' and the 'Enable' checkbox is checked. The 'VocaNOM Connection' tab contains the following fields and options:

- VocaNOM Server:** http://admin.vocanom.com
- Port:** 80
- Ignore Certificates:** ☐ *** Use only for OnPrem with self-signed certificate**
- User:** admin@vocasystem.com
- Password:** [masked with xxxxxxxx]
- Organization ID:** 10101
- Language:** he-il
- Incremental mode:** ☒

At the bottom right are 'OK' and 'Cancel' buttons.

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

Check if the following error appears.

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

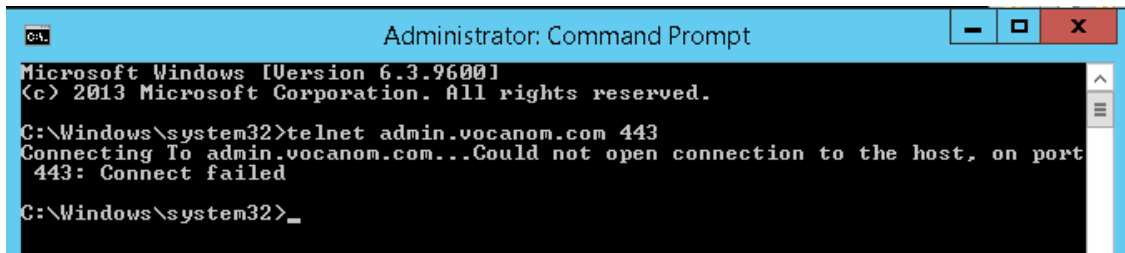
If so, check connectivity to the VocaNOM server.

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

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

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

Figure 9-16: Administrator Command Prompt



2. Check access using the following link: <https://admin.vocanom.com>.
3. If the VocaNOM server is not reachable by Telnet or by the provided link, ask the customer to check network connectivity (Firewall, Routing and DNS).

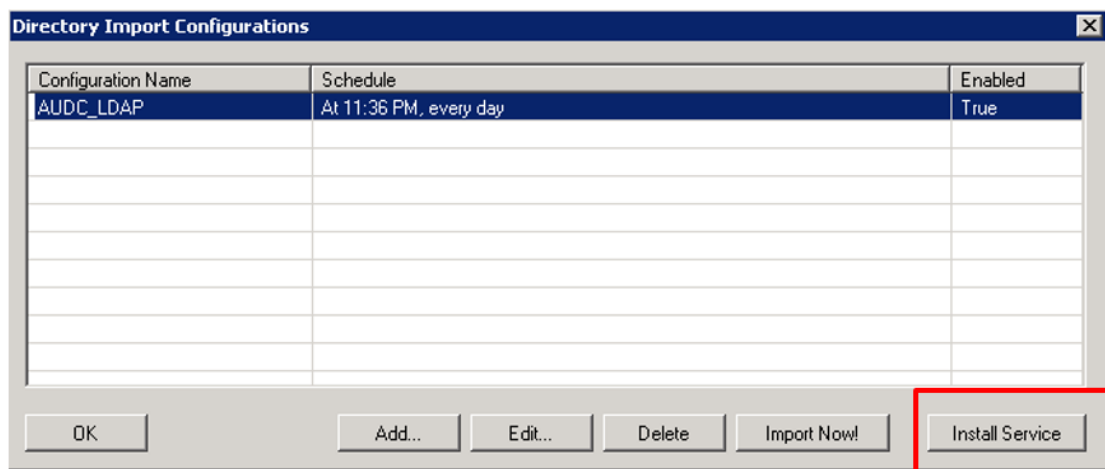
Installing LDAP Client Service

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

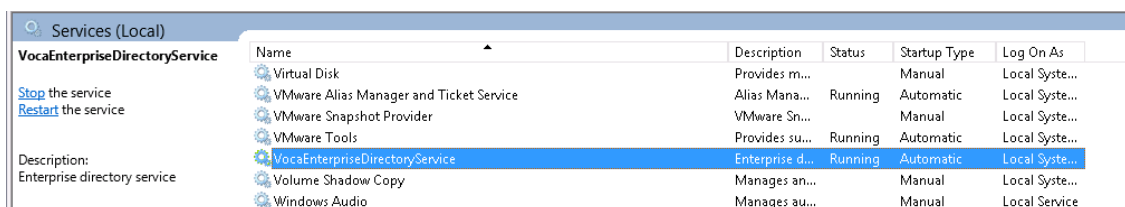
➤ To install the LDAP client service:

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

Figure 9-17: Directory Import Configurations



The LDAP client service is installed.



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

10 Improving LDAP Synchronization

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

- Basic LDAP
- Advanced LDAP
- LDAP User Attributes

Basic LDAP Filters

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

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

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

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

Advanced LDAP Filters

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

Add the following user's object to the filter:

- objectCategory=person
- objectClass=user

For example:

- Filter without phones:

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

- Filter with phones:

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

VocaNOM contains the following contacts:

- Dismissed employees
- Employees who have resigned

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

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

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

LDAP User Attributes

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

Figure 10-1: Default Settings

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

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

Figure 10-2: LDAP User Attributes

The screenshot shows the 'VocaNOM Directory Client Configuration' window. The 'Configuration Name' field is set to 'Audiocodes'. The 'Enable' checkbox is checked. The 'LDAP User Attributes' tab is selected, showing a list of attributes and their corresponding LDAP values:

Attribute	LDAP Value
UniqueId	objectGUID
FirstName	givenName
LastName	sn
Extension	msRTCSIP
Mobile	mobile
Department	department
Email	mail

At the bottom right of the window are 'OK' and 'Cancel' buttons. A 'Test LDAP' button is located below the attribute list.

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 11.
2. Activate the new contact - see [Activating a Contact](#) on page 22.
3. Invite (by email or text message) the user to download the VocaNOM app - see [Importing/Exporting Contact List](#) on page 26.
4. For more information, see [Managing Contacts](#) on page 11.

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 76.
2. Map a city to a branch - see [Mapping a City to a Branch](#) on page 79.
3. Create an alias name for a branch - see [Creating an Alias for a Branch](#) on page 86.
4. Map unmapped cities to a branch - see [Mapping Unmapped Cities to Branches](#) on page 88.
5. Manage overlapping branches - see [Managing Overlapping Branches](#) on page 93.
6. For more information, see [Managing Branches](#) on page 76.

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 127.
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 134.
4. Create flows, set DNIS and menus - see [Configuring Flow Settings](#) on page 129.
5. Define dialed phone number manipulation rules (only if required) - see [Managing Outgoing Rules](#) on page 132.

For more information, see [Configuration](#) on page 127.

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