

Voca Conversational Interaction Center

Version 10.5



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Related Documentation

| Document Name |
|---|
| Voca Release Notes |
| Voca Installation Manual |
| Voca Flow Builder User's Manual |

Document Revision Record

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1 Introduction

Today's modern workplace demands a new approach to customer experience, one that not only empowers agents to enjoy their jobs and provide exceptional service to customers, but also enables internal business lines to provide exceptional service throughout the organization.

AudioCodes Voca, a lightweight, cloud-based, contact center with built-in Conversational AI designed entirely for Microsoft Teams, brings an equal emphasis on employee experience and customer experience.

With Voca as a Native Microsoft Teams App, you can consolidate your unified communications and contact center into one-screen, allowing every Microsoft Teams user to become a potential agent.

Now, agents have real-time access to back-office experts to help improve responsiveness, remove department silos and improve communication with employees.

Voca uses the Microsoft Power Model and offers a unique mix of contact center and voice expertise, making it an ideal solution for organizations looking to modernize their CX capabilities.

With flexible deployment and connectivity models, Voca can integrate with any PBX, contact center or unified communications platform, allowing customers to manage contact centers, IVRs, auto-attendant and call queues, in one centralized multi-tenant application that serves multiple voice platforms in parallel.

Along with Voca's conversational capabilities, the application includes a drag-and-drop flow designer, dedicated worker (agent) and supervisor UI, CRM integration, skill-based routing, behavioral routing, real-time dashboards and historical analytics, providing you with just the right set of features.

Voca is GDPR compliant and available for quick deployment from zero-to-service in just a few days.

About this Guide

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

Voca Benefits

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

- Built-in, multi-language, Conversational AI
- No-code IVR flow designer
- Actionable call queuing

- Teams presence-based routing
- Skill-based routing
- Modern Teams-based agent desktop
- Real-time dashboards
- API-based integrations (CRM, ERP, etc.)
- DTMF collection and generation support
- Historical IVR reports and analytics
- Conditional routing logic
- Multi-tenancy
- 14 supported languages
- Unique vocabulary (contact and product names, locations, and departments)

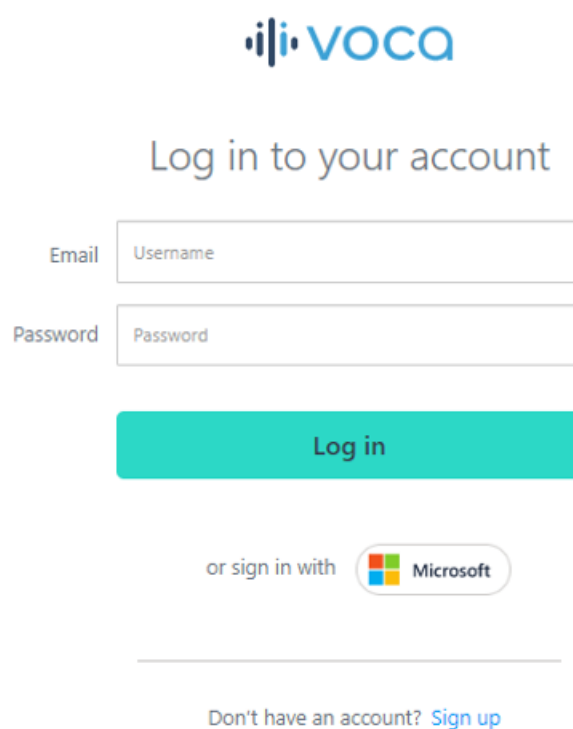
2 Getting Started

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

Logging in to Voca

You can log in to Voca in either of the following ways:

- **Email and Password:** Sign-up first and only after finishing the process log in with the username and password.
- **Microsoft SSO:** Clicking the Microsoft logo to log in using SSO. This option is required to initiate user consent for signing into the application. In some organizations, user consent is blocked and can only be approved by the administrator.



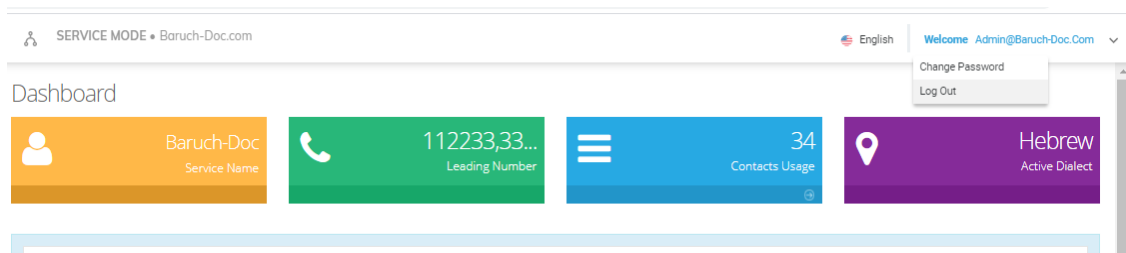
The image shows the Voca login interface. At the top is the Voca logo, which consists of a stylized 'i' icon followed by the word 'VOCA' in blue. Below the logo is the text 'Log in to your account'. There are two input fields: the first is labeled 'Email' and contains the placeholder text 'Username'; the second is labeled 'Password' and contains the placeholder text 'Password'. Below these fields is a large teal button with the text 'Log in'. Underneath the button is the text 'or sign in with' followed by a Microsoft logo (the four-colored square) and the word 'Microsoft'. At the bottom, there is a horizontal line and the text 'Don't have an account? [Sign up](#)'.

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 appears:



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

Change Password

Old Password

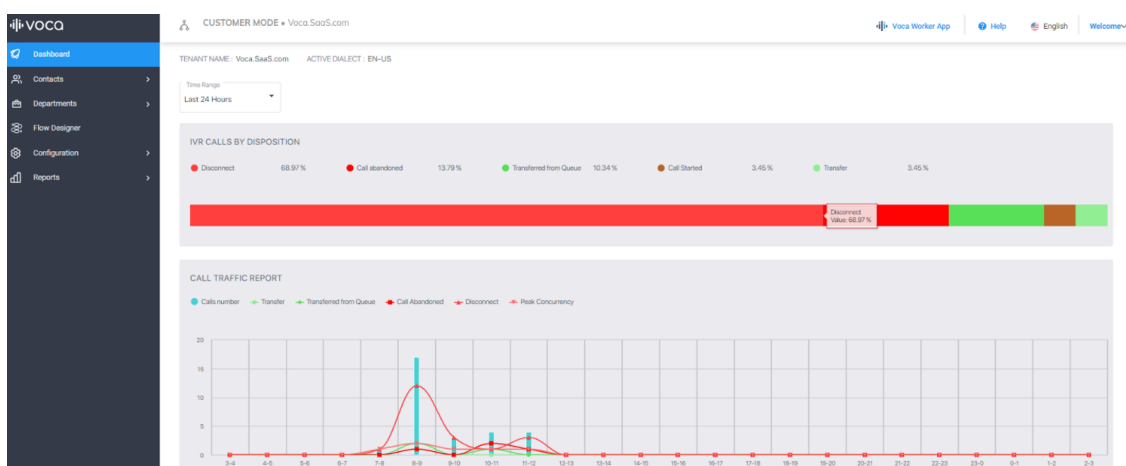
New Password

Confirm Password

Save Changes ➔

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



Sidebar Panel

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

- **Dashboard:** This option displays Tenant Name, 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.
- **Flow Designer:** This option allows you to configure, design and manage complex call flows including API interactions.
- **Configuration:** This option allows you to configure various Voca system settings.
- **Reports:** This option allows you to produce a range of reports.

Dashboard

The following Dashboard titles appear in the colored boxes:

- Tenant Name - Displays the Customer or Company name
- Active Dialect – Displays the main supported language.

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

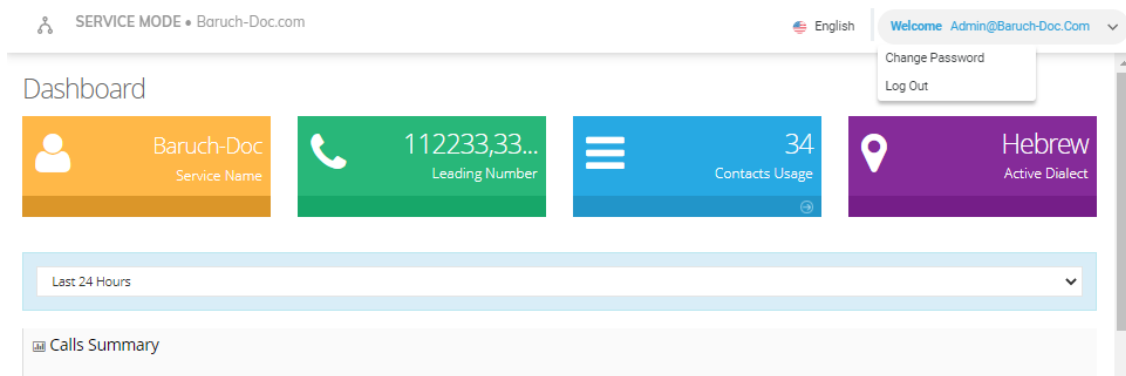
- Last 24 hours
- Last week
- Last month

Logging Out

The procedure below describes how to log out from Voca.

➤ To log out from Voca:

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



2. Select **Log Out**.

3 Managing Contacts

The Contacts page allows the Administrator the option to manage all the contacts in the organization in a centralized place.

The Contacts page can be used for routing calls to contacts by their name or they can be assigned to different places in the Administrator portal.

The Administrator can manage contacts in different ways:

- Manually: Using the Administrator portal to add, edit, delete.
- Import/Export contact using CSV file.
- Automatic synchronization using Active Directory/Azure Active Directory.

Automatic synchronization using LDAP (AD/AAD) requires additional configuration.

For more information, refer to Directory Synchronization.

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**).

Contacts

| Contact Details | | | | | | | | | |
|--------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|---------------------------|-------------------------|
| | | | | | | | | + Add New | Actions |
| Show 100 entries | | | | | | | | Search: | |
| | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | DECT | Status |
| <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | | active |
| <input type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | | active |
| <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | | active |

Showing 1 to 3 of 3 entries

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

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 |
|-----|------------|-----------|------------|-----------------------|--------------------|--------------|
| 5 | Greg | Kashmir | Finance | GregKashmir@gmail.com | 089111222 | +97233768846 |

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).

4. Click **Continue**; the following appears:

New Contact

≡ 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.

Confirm Information

| UID | First Name | Last Name | Department | Email | Extension / Office | Mobile | DECT |
|-----|------------|-----------|------------|-----------------------|--------------------|--------------|------|
| 5 | Greg | Kashmir | Finance | GregKashmir@gmail.com | 089111222 | +97233768846 | |

⏪ Back Save Information

Figure 3-1:

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 corresponding **Contact** check box.

Contacts

≡ Contact Details

Show 100 entries

| | <input type="checkbox"/> | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile |
|--|-------------------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|
| | <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 |
| | <input checked="" type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 |
| | <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 |

Showing 1 to 3 of 3 entries

+ Add New

⚙ Actions

- Import Contacts List
- Export Contacts List
- Activate Contact
- Protect Contact
- Remove Protect
- Disable Contact
- Enable Teams Presence
- Disable Teams Presence
- Edit Contact
- Delete Contact

3. From the 'Actions' drop-down menu, choose **Edit Contact**; the following appears:

Edit Contact

General Settings

First Name*

Last Name*

Department

Email/Teams URI

☐ Teams Presence-Based Routing

Extension

Mobile

DECT

DTMF Routing key

Aliases +

[Save Changes](#)

4. Select the 'Teams Presence-Based Routing' check box to allow the system to check for presence when transferring to this Contact, if it is selected as a queue member in the member queue. To use this feature two things are required:
 - **UID:** The UID of the contact must be the same as the Object ID of the user in the Azure Portal.
 - **Teams Presence Routing:** This requires additional configuration on the System Setting page. For more information, refer to Teams Presence Routing.
5. In the 'DTMF Routing key' field, enter the DTMF routing key. This key is used to reach this contact when entering this DTMF code in the Speech menu (if **Transfer by DTMF routing key** is enabled in the menu). The key must be unique within the service.
6. Make your changes on the 'Edit Contact' screen, and then click **Save Changes**; the updated Contact details appear.

Creating an Alias for a Contact

When using speech recognition on Voca, the system searches for a full Contact Name, by default.

An alias of the contact allows you to configure another name for a contact, known or more familiar under another specified name.

The alias for the contact can be configured for:

- **First Name:** The alias only replaces the first name of the user.
- **Last Name:** The alias only replaces the last name of the user.
- **Full Name:** The alias replaces the full name of the user.

Depending on the configured option, the system will search for the contact with selected alias.

➤ 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 corresponding check box.
3. From the 'Actions' drop-down menu, choose **Edit Contact**.
4. Under the **Alias** group, click + sign; the following example appears:

General Settings

| | |
|------------------|--|
| First Name* | <input type="text" value="David"/> |
| Last Name* | <input type="text" value="Goldberg"/> |
| Department | <input type="text" value="IT"/> |
| Email/Teams URI | <input type="text" value="David.Goldberg@audiocodes.com"/> |
| | <input type="checkbox"/> Teams Presence-Based Routing |
| Extension | <input type="text" value="5435"/> |
| Mobile | <input type="text" value="+97233768849"/> |
| DECT | <input type="text"/> |
| DTMF Routing key | <input type="text"/> |

Aliases

+

▼

—

Save Changes

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.

Edit Contact

General Settings

| | |
|------------------|--|
| First Name* | <input type="text" value="David"/> |
| Last Name* | <input type="text" value="Goldberg"/> |
| Department | <input type="text" value="IT"/> |
| Email/Teams URI | <input type="text" value="David.Goldberg@audiocodes.com"/> |
| | <input type="checkbox"/> Teams Presence-Based Routing |
| Extension | <input type="text" value="5435"/> |
| Mobile | <input type="text" value="+97233768849"/> |
| DECT | <input type="text"/> |
| DTMF Routing key | <input type="text"/> |

Aliases

+

First Name

−

Save Changes

7. For more aliases, click the  sign.

7. 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 menu, choose **Delete Contact**.

Contacts

| Contact Details | | | | | | | | |
|-------------------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|--|
| Show 100 entries | | | | | | | | |
| | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | |
| <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | |
| <input checked="" type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | |
| <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | |

Showing 1 to 3 of 3 entries

+ Add New
Actions
Import Contacts List
Export Contacts List
Activate Contact
Protect Contact
Remove Protect
Disable Contact
Enable Teams Presence
Disable Teams Presence
Edit Contact
Delete Contact

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

Searching a Contact

The procedure below describes how to search for a contact.

➤ To search for a contact:

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

Protecting a Contact

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

➤ To protect a contact:

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

| Contact Details | | | | | | | | |
|-------------------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|--|
| Show 100 entries | | | | | | | | |
| | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | |
| <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | |
| <input checked="" type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | |
| <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | |

Showing 1 to 3 of 3 entries

+ Add New
Actions
Import Contacts List
Export Contacts List
Activate Contact
Protect Contact
Remove Protect
Disable Contact
Enable Teams Presence
Disable Teams Presence
Edit Contact
Delete Contact

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

Contacts

| Contact Details | | | | | | | | | |
|--------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|---------|-----------|
| Show 100 entries | | | | | | | | Search: | |
| | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | DECT | Status |
| <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | | active |
| <input type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | | protected |
| <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | | active |

Showing 1 to 3 of 3 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 menu, choose **Remove Protect**; the following appears:

Contacts

| Contact Details | | | | | | | | | |
|-------------------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|---------|-----------|
| Show 100 entries | | | | | | | | Search: | |
| | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | DECT | Status |
| <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | | active |
| <input checked="" type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | | protected |
| <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | | active |

Showing 1 to 3 of 3 entries

+ Add New Actions

- Import Contacts List
- Export Contacts List
- Activate Contact
- Protect Contact
- Remove Protect
- Disable Contact
- Enable Teams Presence
- Disable Teams Presence
- Edit Contact
- Delete Contact

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

Contacts

| Contact Details | | | | | | | | | |
|--------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|---------|--------|
| Show 100 entries | | | | | | | | Search: | |
| | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | DECT | Status |
| <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | | active |
| <input type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | | active |
| <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | | active |

Showing 1 to 3 of 3 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 page (**Contacts > Contacts List**).

2. Select the contact you wish to activate by selecting the 'Contact' check box.

Contacts

The screenshot shows the 'Contact Details' screen with a table of three contacts. The 'Actions' dropdown menu is open, and 'Activate Contact' is highlighted. The table has columns: UID, First Name, Last Name, Email, Department, Extension / Office, and Mobile. The first contact is Jim Barnes (Sales, 1457, +97233768850). The second contact is David Goldberg (IT, 5435, +97233768849) and is selected with a blue checkmark. The third contact is Bob Jane (Billing, 1450, 545454).

| UID | First Name | Last Name | Email | Department | Extension / Office | Mobile |
|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|
| 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 |
| 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 |
| 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 |

3. From the 'Actions' drop-down menu, choose **Activate Contact**; the following appears:

Contacts

The screenshot shows the 'Contact Details' screen with the same table of contacts, but now with a 'Status' column. The status for all contacts is 'Active'. The table has columns: UID, First Name, Last Name, Email, Department, Extension / Office, Mobile, DECT, and Status. The first contact is Jim Barnes (Sales, 1457, +97233768850, Active). The second contact is David Goldberg (IT, 5435, +97233768849, Active). The third contact is Bob Jane (Billing, 1450, 545454, Active).

| UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | DECT | Status |
|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|------|--------|
| 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | | Active |
| 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | | Active |
| 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | | Active |

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.

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 menu, choose **Disable Contacts**; the following appears:

Contacts

The screenshot shows the 'Contact Details' screen with the same table of contacts. The 'Actions' dropdown menu is open, and 'Disable Contact' is highlighted. The table has columns: UID, First Name, Last Name, Email, Department, Extension / Office, and Mobile. The first contact is Jim Barnes (Sales, 1457, +97233768850). The second contact is David Goldberg (IT, 5435, +97233768849) and is selected with a blue checkmark. The third contact is Bob Jane (Billing, 1450, 545454).

| UID | First Name | Last Name | Email | Department | Extension / Office | Mobile |
|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|
| 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 |
| 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 |
| 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 |

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

Contacts

Contact Details

Add New

Actions

Show100entries

Search

| | <input type="checkbox"/> | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | DECT | Status |
|--------------------------|--------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|------|----------|
| <input type="checkbox"/> | <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | | active |
| <input type="checkbox"/> | <input type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | | disabled |
| <input type="checkbox"/> | <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | | active |

Showing 1 to 3 of 3 entries

<

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Importing and 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.

Contacts

Contact Details

+ Add New

Actions

Show

100

entries

Se

| | <input type="checkbox"/> | UID | First Name | Last Name | Email | Department | Extension / Office | Mobile | |
|--------------------------|--------------------------|-----|------------|-----------|-------------------------------|------------|--------------------|--------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 0 | Jim | Barnes | JimBarnes12@gmail.com | Sales | 1457 | +97233768850 | <div><div>Activate Contact</div><div>Protect Contact</div><div>Remove Protect</div><div>Disable Contact</div><div>Enable Teams Presence</div><div>Disable Teams Presence</div></div> |
| <input type="checkbox"/> | <input type="checkbox"/> | 1 | David | Goldberg | David.Goldberg@audiocodes.com | IT | 5435 | +97233768849 | |
| <input type="checkbox"/> | <input type="checkbox"/> | 2 | Bob | Jane | Bob.Jane@audiocodes.com | Billing | 1450 | 545454 | |

Showing 1 to 3 of 3 entries

<

1

>

Edit Contact



Delete Contact

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 then select the file to be imported.
6. Select the CSV or Excel template.
7. Click **Import Contacts List**.

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 | |
| <input checked="" type="button" value="Confirm Import"/> <input type="button" value="Cancel Import"/> | | |

8. This report lists the status of the contracts 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) appears with a pink background, while the updated contact appears with a green background.

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

×

Showing 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

9. 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 same behavior applies for Contacts that have been disabled.

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

Contacts

≡ Contact Details

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

11. 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.

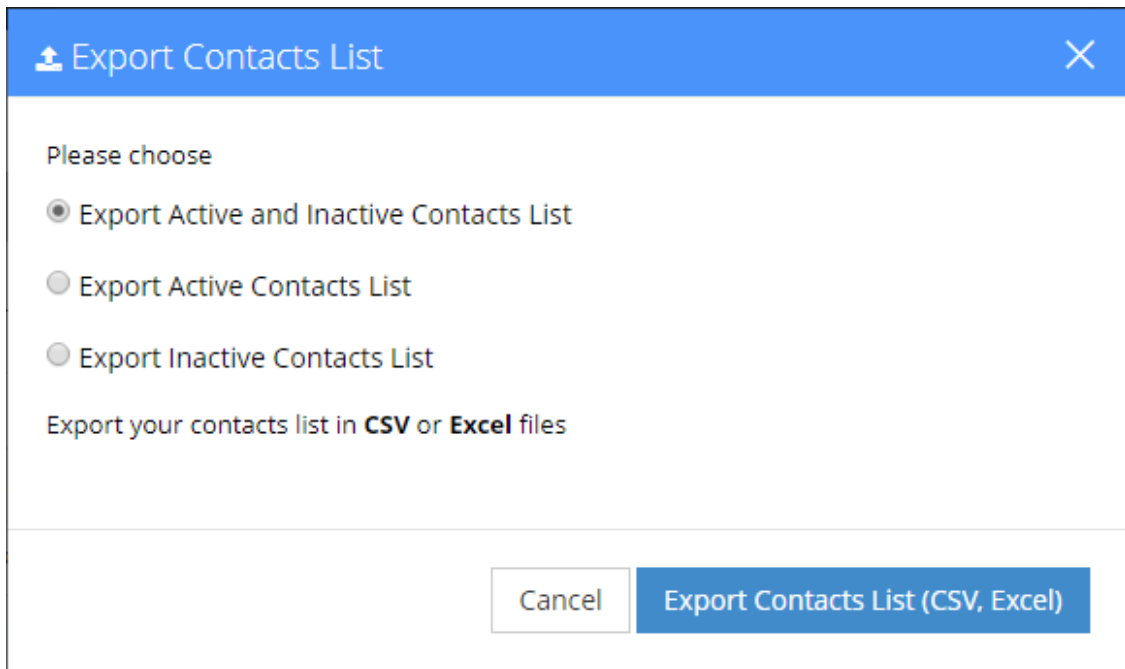
| | A | B | C | D | E | F | G | H | I | J |
|---|----------|-----------|----------|-----------|--------|------------|-------|-----------|-----------------|-----------------|
| 1 | UniqueID | FirstName | LastName | Extension | Mobile | Department | Email | FirstName | LastNameAliases | FullNameAliases |
| 2 | | | | | | | | | | |
| 3 | | | | | | | | | | |
| 4 | | | | | | | | | | |
| 5 | | | | | | | | | | |

Exporting Contact Information

The procedure below describes how to export contact information.

➤ To export contact information:

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



Export Contacts List [Close]

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**.

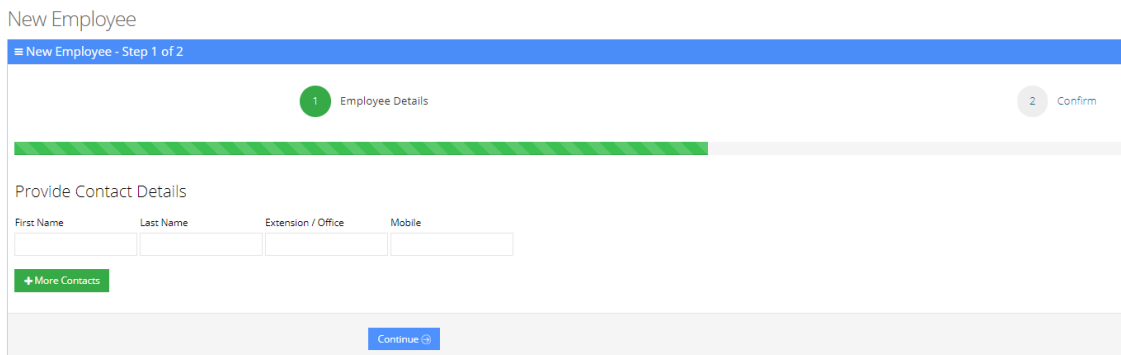
Defining Additional Employees

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 appears:



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**; the following appears:

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**.

4 Managing Departments

The Departments page allows the Administrator to manage all the departments in the organization ifrom a centralized place.

The Administrator can manage the department in the following ways:

- Manually using the Administrator portal to add, edit, delete
- Importing/Exporting departments using the CSV file

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 appears:

New Department Dictionary

1

Department Details

2

Confirm

Provide Department Dictionary Details

Dictionary Name

Application Software Package (ASP)

AutoAttendant - EN-US

+ More Dictionary

Continue

3. Under the Provide Department Dictionary Details group, enter the following:
 - Dictionary Name
 - Application Software Package (ASP)

4. Enter the required fields.

New Department Dictionary

≡ New Department Dictionary - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Dictionary Details

Dictionary Name: IT Menu Application Software Package (ASP): AutoAttendant - EN-US

+ 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 menu, choose **Edit Dictionary**.

Departments

≡ Dictionary List

Show 100 entries

| 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

Actions: Add New, Edit Dictionary, Delete Dictionary

4. Edit the required fields.

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**.

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 a specific department Dictionary manually.

➤ To add a department manually:

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

Default - Departments

| Department Details | | | | | | | |
|--|-----------------|-------------------|-----------|-------------------------------|------------------|---------|--------|
| <div> <div>Show 100 entries</div> <div>Search</div> </div> | | | | | | | |
| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions | Status |
| <input type="checkbox"/> | Default | | | Non Working Hours (always on) | - | | active |
| Showing 1 to 1 of 1 entries | | | | | | | |

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

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

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.

1

Department Details

2

Confirm

Provide Department Details

UID
ABC

Department Name
Human Resources

Extension
4000

Parent Department

+ More Departments

Continue ➞

6. Click **Continue**.

7. Click **Save Information**.



- 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.

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 selecting the **Department** check box.

Default - Departments

Department Details

Show100entries

| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions |
|-------------------------------------|---------------------|-------------------|-----------|--------------------------|------------------|--|
| <input type="checkbox"/> | Anaesthetics | Anaesthetics | 1111 | - | Default | Transfer to Extension: 1111, Transfer to Extension: 1111 |
| <input type="checkbox"/> | Cardiology | Cardiology | 2211 | - | Default | Transfer to Extension: 2211, Transfer to Extension: 2211 |
| <input type="checkbox"/> | Diabetes Center | Diabetes Center | 3311 | - | Default | Transfer to Extension: 3311, Transfer to Extension: 3311 |
| <input type="checkbox"/> | Endocrinology | Endocrinology | 4411 | - | Default | Transfer to Extension: 4411, Transfer to Extension: 4411 |
| <input checked="" type="checkbox"/> | Marcom | Marketing | 4242 | - | Default | Transfer to Extension: 4242, Transfer to Extension: 4242 |
| <input type="checkbox"/> | Maternity 1st Floor | Maternity | 2407 | - | Default | Transfer to Extension: 2407 |
| <input type="checkbox"/> | TW | HR | 1234 | - | Default | Transfer to Extension: 1234, Transfer to Extension: 1234 |

Showing 1 to 7 of 7 entries

+ Add New

Actions

Import Departments List

Export Departments list

Import Package

Activate Department

Disable Department

Edit Department

Delete Department

active

active

active

4. From the 'Actions' drop-down menu, choose **Edit Department**; the following appears:

Edit Department

General

| | |
|--------------------------|--|
| UID* | <input type="text" value="MMM"/> |
| Department Name* | <input type="text" value="Marcom"/> |
| Parent Department | <input type="text" value="Marketing"/> |
| Email | <input type="text"/> |
| Extension 1 | <input type="text" value="4242"/> |
| Extension 2 | <input type="text"/> |
| Extension 3 | <input type="text"/> |
| DTMF Routing key | <input type="text"/> |
| Time of Day Routing Type | <input type="text" value="Non Working Hours (always on)"/> |

Actionable Working Hours

| | | | |
|----------|--|------|-----------------------------------|
| Action 1 | <input type="text" value="Transfer to Phone"/> | Data | <input type="text" value="4244"/> |
|----------|--|------|-----------------------------------|

5. In the 'Parent Department' field, enter additional an name for the selected department. If there is more than one department with the same name, Voca checks for the Parent Department that is configured.
6. In the 'Email' field, enter the main department email address that can be used for sending missed call notifications for that department.
7. In the 'Extension 1/2/3' fields, enter the extension numbers for the department. These extensions might be used if Call Hunting is activated for departments in the Speech menu.
8. In the 'DTMF Routing key' field, enter the DTMF routing key. This key is used to reach this department, when entering this DTMF code during the Speech menu (if **Transfer by DTMF routing key** is enabled in the menu). The key must be unique within the service.
9. The 'Time Of Day Routing Type' drop-down list determines how to handle the incoming call based on working hours. There are three possible options:
 - If you select **Working Hours (always on)**, all incoming call, regardless of any working hours, are always handled according to the actions selected.
 - If you select **Working Hours Vs Non Working Hours**, calls are handled based on working hours. When selecting this option, a Working Hours Set should be selected. Actions will be configured for actionable working hours and for actionable Non-working hours.

| | |
|--------------------------|---------------------------------------|
| Time of Day Routing Type | Working Hours vs. Non Working Hours ▼ |
| Working Hour Set | Default ▼ |

Actionable Working Hours

| | | | |
|----------|-------------------------|------|------|
| Action 1 | Transfer to Extension ▼ | Data | 4242 |
|----------|-------------------------|------|------|

Actionable Non-Working Hours

| | | | |
|----------|--------------|------|-----------------------|
| Action 1 | Go to menu ▼ | Data | Default Speech Menu ▼ |
|----------|--------------|------|-----------------------|

- If you select **Actionable Working Hours (with shifts)**, calls are handled based on working hours. When selecting this option, a Working Hours Set should be selected. All shifts defined in that set will be displayed and for each working hour shift.

| | |
|--------------------------|--|
| Time of Day Routing Type | Actionable Working Hours (with shifts) ▼ |
| Working Hour Set | wh_shifts ▼ |

Actionable Working Hours

| | | | | | |
|----------|-------------------------|-------|-------|--|--|
| — | Tuesday | 00:00 | 12:59 | | |
| Action 1 | Transfer to Extension ▼ | Data | 5205 | | |
| — | | 13:00 | 23:45 | | |
| Action 1 | Transfer to Extension ▼ | Data | 5205 | | |

Actionable Non-Working Hours

| | | | |
|----------|-------------------------|------|------|
| Action 1 | Transfer to Extension ▼ | Data | 5205 |
|----------|-------------------------|------|------|

- Relevant actions can be also configured for the non-working hours.

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

The screenshot shows the 'Actions' configuration page for a department. On the left, there are tabs for 'Actions', 'Prompts', 'File Options', and 'Aliases'. The 'Actions' tab is selected, displaying a dropdown menu with the following options: 'Transfer to Extension', 'Transfer to Operator', 'Disconnect', 'Transfer to Phone', 'Silent Transfer to Phone', 'Transfer to Extension' (which is highlighted in blue), 'Send SMS', and 'Transfer to Queue'. To the right of the dropdown is a 'Data' field containing the number '4432'. Below the dropdown is a toggle switch for 'Activate Non-Work' and a dropdown menu for 'File Options' currently set to 'Default'. At the bottom right, there is a blue button labeled 'Save Changes'.

11. In the 'Action1 Data' field, enter the related action data for the 'Action 1' field. For more information of the possible Actions, see [Actions](#).

12. Make your changes, and then click **Save Changes**.

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 selecting the **Department** check box.
4. From the 'Actions' drop-down list, select **Edit Department**; the following appears:

Edit Department

General

| | |
|--------------------------|--|
| UID* | <input type="text" value="MMM"/> |
| Department Name* | <input type="text" value="Marcom"/> |
| Parent Department | <input type="text" value="Marketing"/> |
| Email | <input type="text"/> |
| Extension 1 | <input type="text" value="4242"/> |
| Extension 2 | <input type="text"/> |
| Extension 3 | <input type="text"/> |
| DTMF Routing key | <input type="text"/> |
| Time of Day Routing Type | <input type="text" value="Working Hours vs. Non Working Hours"/> |
| Working Hour Set | <input type="text" value="Test"/> |

Actionable Working Hours

| | | | |
|----------|--|------|-----------------------------------|
| Action 1 | <input type="text" value="Transfer to Extension"/> | Data | <input type="text" value="4242"/> |
|----------|--|------|-----------------------------------|

Actionable Non-Working Hours

| | | | |
|----------|--|------|-----------------------------------|
| Action 1 | <input type="text" value="Transfer to Extension"/> | Data | <input type="text" value="4242"/> |
|----------|--|------|-----------------------------------|

Prompts

| | |
|-------------------|---|
| File Options | <input type="text" value="Current"/> |
| File | <input type="button" value="▶ Play"/> |
| File Name* | <input type="text" value="Business Hours"/> |
| File Description* | <input type="text" value="Recording to be played during business hours"/> |

Aliases

| | |
|--|----------------------------------|
| <input type="text" value="Marc"/> | <input type="button" value="⊕"/> |
| <input type="text" value="Marc_Dept"/> | <input type="button" value="⊖"/> |

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

➤ To upload a prompt:

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

Prompts

File Options Upload

File Name* Business Hours

File Description* Recording to be played during business hour!

File Upload* Choose File

Aliases +

Save Changes

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

Prompts

File Options Upload

File Name* Business Hours

File Description* Recording to be played during business hour!

File Upload* Inbound Call.wav Choose File

Aliases +

Save Changes

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



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

➤ **To record a prompt:**

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

Prompts

File Options Record

File Name* Business Hours

File Description* Recording to be played during business hour!

File Record* Record Stop Play Download

Aliases +

Save Changes


3. When finished recording, click **Stop**.
4. To replay the recent recording, click **Play**.

5. To save a copy of the recorded audio file, click **Download**.
6. Click **Save Changes** to complete the recording process.

Creating Keywords 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 a keyword for 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 selecting the 'Department' check box.
4. From the 'Actions' drop-down menu, choose **Edit Department**.
5. Under the **Keywords** group, click  ; the following appears:


Keywords 




Save Changes

6. Enter the keyword name(s).

Keywords 

Marc 

Marc_Dept 

Save Changes

7. Click **Save Changes**; the changes have been updated.

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.

- From the 'Actions' drop-down menu, choose **Delete Department**.

Default - Departments

| Department Details | | | | | | | + Add New | ⚙ Actions |
|-------------------------------------|-----------------|-------------------|-----------|-------------------------------|------------------|---------|-----------|---|
| Show 100 entries | | | | | | | | Se |
| | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions | | |
| <input checked="" type="checkbox"/> | Default | | | Non Working Hours (always on) | - | | | <ul style="list-style-type: none"> Import Departments List Export Departments list Activate Department Disable Department Edit Department Delete Department |
| Showing 1 to 1 of 1 entries | | | | | | | | |

- The following message appears: 'Are you sure you want to delete the selected department (s)?'
- Click **OK** to delete the selected department.

Searching a Department

The procedure below describes how to search for a department.

➤ To search for a department:

- Open the Departments menu and click on the required department (**Departments** > {department dictionary name}).
- Click on the **Department List** menu.
- Enter the search criteria in the **Search** field; the searched data is displayed.

Departments

| Department Details | | | | | + Add New | ⚙ Actions |
|---|-----------------|-------------------|-----------|--------|---|-----------|
| Show 100 entries | | | | | Search: Marcom | |
| | Department Name | Parent Department | Extension | Status | | |
| <input checked="" type="checkbox"/> | Marcom | Marketing | 4414 | active | | |
| Showing 1 to 1 of 1 entries (filtered from 5 total entries) | | | | | <div> < 1 > </div> | |

Disabling a Department

The procedure below describes how to disable a department.

➤ To disable a department:

- Open the **Departments** menu and click on the required department (**Departments** > {Department Dictionary name}).
- Click on the **Department List** menu.
- Select the department you wish to disable by selecting the **Department** check box.

4. From the 'Actions' drop-down menu, choose **Disable Department**.

Default - Departments

Department Details

Show 100 entries

| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions |
|-------------------------------------|---------------------|-------------------|-----------|-------------------------------------|------------------|--|
| <input type="checkbox"/> | Anaesthetics | Anaesthetics | 1111 | - | Default | Transfer to Extension: 1111, Transfer to Extension: 1111 |
| <input type="checkbox"/> | Cardiology | Cardiology | 2211 | - | Default | Transfer to Extension: 2211, Transfer to Extension: 2211 |
| <input type="checkbox"/> | Diabetes Center | Diabetes Center | 3311 | - | Default | Transfer to Extension: 3311, Transfer to Extension: 3311 |
| <input type="checkbox"/> | Endocrinology | Endocrinology | 4411 | - | Default | Transfer to Extension: 4411, Transfer to Extension: 4411 |
| <input checked="" type="checkbox"/> | Marcom | Marketing | 4242 | Working Hours vs. Non Working Hours | Test | Transfer to Extension: 4242, Transfer to Extension: 4242 |
| <input type="checkbox"/> | Maternity 1st Floor | Maternity | 2407 | - | Default | Transfer to Extension: 2407 |
| <input type="checkbox"/> | TW | HR | 1234 | - | Default | Transfer to Extension: 1234, Transfer to Extension: 1234 |

Showing 1 to 7 of 7 entries

Actions: Add New, Import Departments List, Export Departments list, Import Package, Activate Department, Disable Department, Edit Department, Delete Department

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

Default - Departments

Department Details

Show 100 entries

| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions | Status |
|--------------------------|---------------------|-------------------|-----------|-------------------------------------|------------------|--|----------|
| <input type="checkbox"/> | Anaesthetics | Anaesthetics | 1111 | - | Default | Transfer to Extension: 1111, Transfer to Extension: 1111 | active |
| <input type="checkbox"/> | Cardiology | Cardiology | 2211 | - | Default | Transfer to Extension: 2211, Transfer to Extension: 2211 | active |
| <input type="checkbox"/> | Diabetes Center | Diabetes Center | 3311 | - | Default | Transfer to Extension: 3311, Transfer to Extension: 3311 | active |
| <input type="checkbox"/> | Endocrinology | Endocrinology | 4411 | - | Default | Transfer to Extension: 4411, Transfer to Extension: 4411 | active |
| <input type="checkbox"/> | Marcom | Marketing | 4242 | Working Hours vs. Non Working Hours | Test | Transfer to Extension: 4242, Transfer to Extension: 4242 | disabled |
| <input type="checkbox"/> | Maternity 1st Floor | Maternity | 2407 | - | Default | Transfer to Extension: 2407 | active |
| <input type="checkbox"/> | TW | HR | 1234 | - | Default | Transfer to Extension: 1234, Transfer to Extension: 1234 | active |

Showing 1 to 7 of 7 entries

System Notification: Status successfully updated

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 selecting the **Department** check box.
4. From the 'Actions' drop-down menu, choose **Activate Department**.

Default - Departments

| Department Details | | | | | | | + Add New | ⚙ Actions |
|-------------------------------------|---------------------|-------------------|-----------|-------------------------------------|------------------|--|---|-----------|
| Show 100 entries | | | | | | | <ul style="list-style-type: none"> Import Departments List Export Departments list Import Package Activate Department Disable Department Edit Department Delete Department | |
| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions | | |
| <input type="checkbox"/> | Anaesthetics | Anaesthetics | 1111 | - | Default | Transfer to Extension: 1111, Transfer to Extension: 1111 | | |
| <input type="checkbox"/> | Cardiology | Cardiology | 2211 | - | Default | Transfer to Extension: 2211, Transfer to Extension: 2211 | | |
| <input type="checkbox"/> | Diabetes Center | Diabetes Center | 3311 | - | Default | Transfer to Extension: 3311, Transfer to Extension: 3311 | | |
| <input type="checkbox"/> | Endocrinology | Endocrinology | 4411 | - | Default | Transfer to Extension: 4411, Transfer to Extension: 4411 | | |
| <input checked="" type="checkbox"/> | Marcom | Marketing | 4242 | Working Hours vs. Non Working Hours | Test | Transfer to Extension: 4242, Transfer to Extension: 4242 | disabled | |
| <input type="checkbox"/> | Maternity 1st Floor | Maternity | 2407 | - | Default | Transfer to Extension: 2407 | active | |
| <input type="checkbox"/> | TW | HR | 1234 | - | Default | Transfer to Extension: 1234, Transfer to Extension: 1234 | active | |

Showing 1 to 7 of 7 entries

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

Default - Departments

System Notification

Status successfully updated

Department Details

+ Add New

⚙ Actions

Show100entries

Search

| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions | Status |
|--------------------------|---------------------|-------------------|-----------|-------------------------------------|------------------|--|--------|
| <input type="checkbox"/> | Anaesthetics | Anaesthetics | 1111 | - | Default | Transfer to Extension: 1111, Transfer to Extension: 1111 | active |
| <input type="checkbox"/> | Cardiology | Cardiology | 2211 | - | Default | Transfer to Extension: 2211, Transfer to Extension: 2211 | active |
| <input type="checkbox"/> | Diabetes Center | Diabetes Center | 3311 | - | Default | Transfer to Extension: 3311, Transfer to Extension: 3311 | active |
| <input type="checkbox"/> | Endocrinology | Endocrinology | 4411 | - | Default | Transfer to Extension: 4411, Transfer to Extension: 4411 | active |
| <input type="checkbox"/> | Marcom | Marketing | 4242 | Working Hours vs. Non Working Hours | Test | Transfer to Extension: 4242, Transfer to Extension: 4242 | active |
| <input type="checkbox"/> | Maternity 1st Floor | Maternity | 2407 | - | Default | Transfer to Extension: 2407 | active |
| <input type="checkbox"/> | TW | HR | 1234 | - | Default | Transfer to Extension: 1234, Transfer to Extension: 1234 | active |

Showing 1 to 7 of 7 entries

<

1

>

Keyword to Department Mapping

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

➤ To add a keyword to a department:

1. Open the Departments Aliases page (**Departments > {department Dictionary name}**).
2. Click on the **Department Keywords** menu.

Department Keywords

| Department Keywords | | |
|---|-------------|-----------------------------|
| Keywords and the departments to which they are mapped | | |
| Show 100 entries | | |
| Keywords | Departments | Action |
| Marc | Ⓜ Marcom | Add keyword to a department |
| Marc_Dept | Ⓜ Marcom | Add keyword to a department |

Showing 1 to 2 of 2 entries

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

Add keyword to department

select department:

HR

HR

Logistics

Marcom

- Click **Save**; In our example, **HR** was added to the Marc keywords name.

Department Keywords

| Department Keywords | | |
|---|--|-----------------------------|
| Keywords and the departments to which they are mapped | | |
| Show 100 entries | Search: | |
| Keywords | Departments | Action |
| Marc | <div> <div>Marcom</div> <div>HR</div> </div> | Add keyword to a department |
| Marc_Dept | <div> <div>Marcom</div> </div> | Add keyword to a department |
| Showing 1 to 2 of 2 entries | | |

➤ To delete an Alias from a Department:

- Open the Departments Aliases page (**Departments** > {department Dictionary name}).
- Click on the **Department Keywords** menu.

Department Keywords

| Department Keywords | | |
|---|--|-----------------------------|
| Keywords and the departments to which they are mapped | | |
| Show 100 entries | Search: | |
| Keywords | Departments | Action |
| Marc | <div> <div>Marcom</div> <div>HR</div> </div> | Add keyword to a department |
| Marc_Dept | <div> <div>Marcom</div> </div> | Add keyword to a department |
| Showing 1 to 2 of 2 entries | | |

- Double-click the department button that you want to delete. In our example, we want to delete **Marc** from the **HR** department. A message appears informing you that the alias will be deleted from the department.
- Click **OK**.

Searching for a Keyword

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

Department Keywords

Department Keywords

Keywords and the departments to which they are mapped

Show entries Search:

| Keywords | Departments | Action |
|-----------|-------------|---|
| Marc_Dept | Marcom | Add keyword to a department |

Showing 1 to 1 of 1 entries (filtered from 2 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.

Default - Departments

Department Details

Show entries Se

| <input type="checkbox"/> | Department Name | Parent Department | Extension | Time of Day Routing Type | Working Hour Set | Actions |
|--------------------------|---------------------|-------------------|-----------|-------------------------------------|------------------|--|
| <input type="checkbox"/> | Anaesthetics | Anaesthetics | 1111 | - | Default | Transfer to Extension: 1111, Transfer to Extension: 1111 |
| <input type="checkbox"/> | Cardiology | Cardiology | 2211 | - | Default | Transfer to Extension: 2211, Transfer to Extension: 2211 |
| <input type="checkbox"/> | Diabetes Center | Diabetes Center | 3311 | - | Default | Transfer to Extension: 3311, Transfer to Extension: 3311 |
| <input type="checkbox"/> | Endocrinology | Endocrinology | 4411 | - | Default | Transfer to Extension: 4411, Transfer to Extension: 4411 |
| <input type="checkbox"/> | Human Resources | Management | 1234 | Non Working Hours (always on) | - | - |
| <input type="checkbox"/> | Marcom | Marketing | 4242 | Working Hours vs. Non Working Hours | Test | Transfer to Extension: 4242, Transfer to Extension: 4242 |
| <input type="checkbox"/> | Maternity 1st Floor | Maternity | 2407 | - | Default | Transfer to Extension: 2407 |
| <input type="checkbox"/> | TW | HR | 1234 | - | Default | Transfer to Extension: 1234, Transfer to Extension: 1234 |

Showing 1 to 8 of 8 entries < 1 >

[+ Add New](#) [Actions](#)

[Import Departments List](#)

[Export Departments list](#)

[Import Package](#)

[Activate Department](#)

[Disable Department](#)

[Edit Department](#)

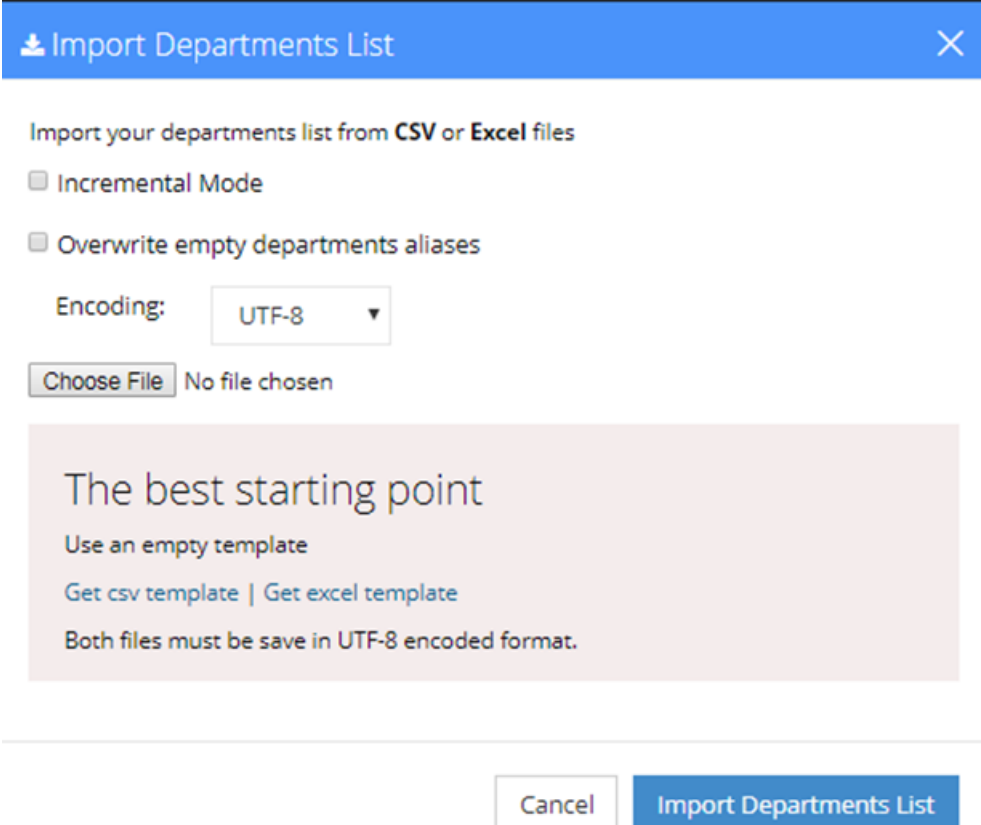

[Delete Department](#)

Importing Department Information

The procedure below describes how to import department information.

➤ To import department information:

1. Open the **Departments** menu, and then click on the required department (**Departments > {department dictionary name}**).
2. Click on the **Department List** menu.
3. From the **Actions** drop-down list, on the Department Details page, click **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


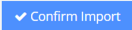
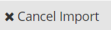
[Get csv template](#) | [Get excel template](#)

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

Cancel Import Departments List

4. 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.
5. If you select the 'Overwrite empty departments aliases' check box, all empty departments aliases in the imported file are overwritten.
6. From the 'Encoding' drop-down list, select the Encoding type. The recommended value is **UTF-8**.
7. Click **Choose File** and select the file to be imported.
8. Select the CSV or Excel template.
9. Click **Import Departments List**.

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 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 appears:

Default - Departments

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

- 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:

| | A | B | C | D |
|---|-----|-----------------|-----------|---------|
| 1 | UID | Department Name | Extension | Aliases |
| 2 | | | | |
| 3 | | | | |

Exporting Department Information

The procedure below describes how to export department information.

➤ **To export department information:**

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

Export Departments list [X]

Please choose

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

Export your debugdepartments list in CSV or Excel files

Cancel **Export Departments list (CSV, Excel)**

- Excel file .xlsx
- Csv file .csv

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

5 Flow Designer

The Flow Designer offers a way to configure, design and manage complex call flows. It provides a rich and powerful set of building blocks that Administrators can use to create their own call flow scenarios.

For a detailed description of how to use the Flow Designer click [here](#).

6 Configuration

This section describes how to configure the following:

- Telephony Settings
- Prompts
- Menu Settings
- Flow Settings
- Routing
- Working Hours
- Events & Holidays
- System Settings
- Access Management
- Dial Plan Settings

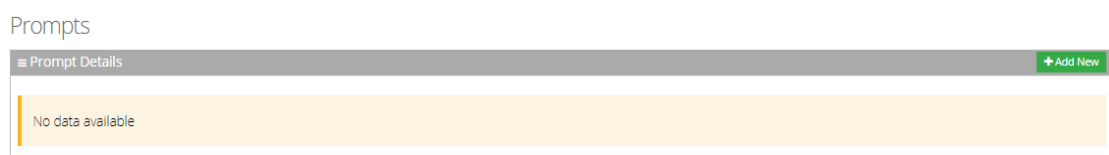
Adding a Voice Prompt

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.

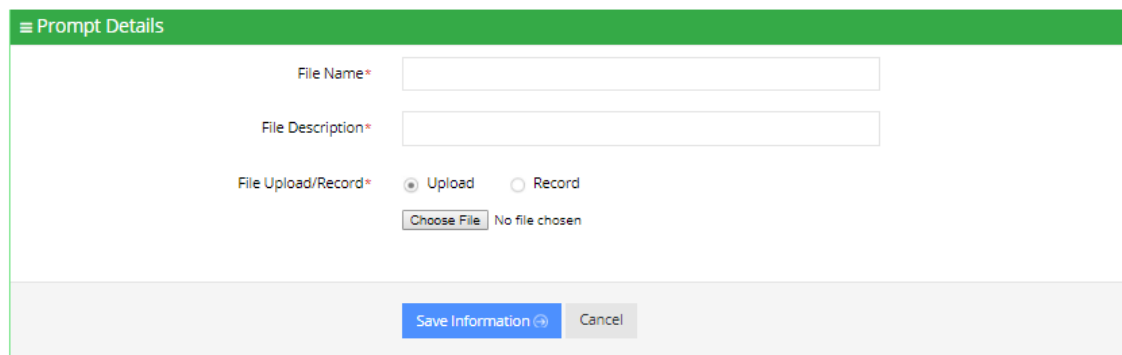
➤ To add a new prompt:

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



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

New Prompt



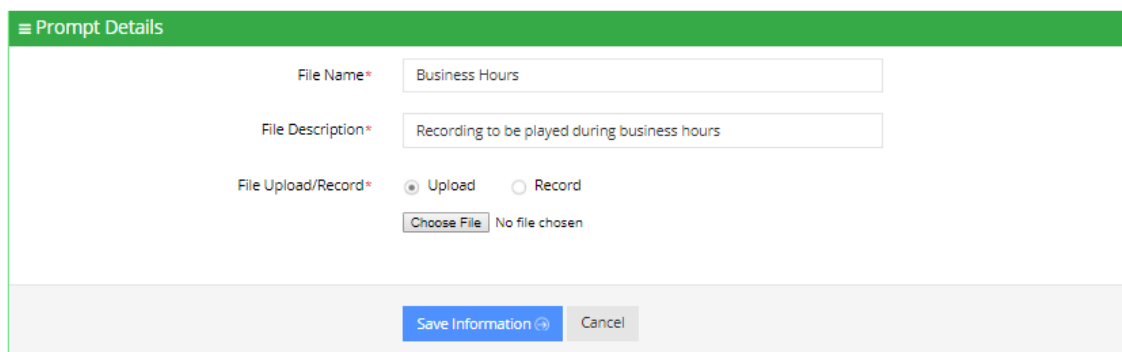
The screenshot shows the 'New Prompt' form with a green header bar labeled 'Prompt Details'. Below the header, there are two text input fields: 'File Name*' and 'File Description*'. Below these fields are two radio buttons: 'Upload' (selected) and 'Record'. Below the radio buttons is a 'Choose File' button and the text 'No file chosen'. At the bottom of the form are two buttons: 'Save Information' and 'Cancel'.

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

New Prompt



The screenshot shows the 'New Prompt' form with the same layout as the previous one, but with the 'File Name' field filled with 'Business Hours' and the 'File Description' field filled with 'Recording to be played during business hours'. The 'Upload' radio button is still selected, and the 'Choose File' button and 'No file chosen' text are still present. The 'Save Information' and 'Cancel' buttons are at the bottom.

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.

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 Telephony Settings

The procedures below describe how to view and configure telephony settings and assign DNS numbers.

➤ **To view telephony settings:**

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

Telephony Settings

| Flow Settings Details + Add New ⚙ Actions ▾ | | | | | | |
|--|---------------|-------------|------------|----------------------------|--------------------|---|
| Show 100 entries | | | | | | Search |
| <input type="checkbox"/> | DNIS Number ▲ | DNIS Name ◊ | Timezone ◊ | Time of Day Routing Type ◊ | Working Hour Set ◊ | Events & Holidays ◊ |
| <input type="checkbox"/> | 123 | 33 | UTC -11:00 | - | Default | Default |
| <input type="checkbox"/> | 12334 | abc | UTC -10:00 | - | Default | Default |
| <input type="checkbox"/> | 112233 | | UTC +0:00 | - | Default | Default |
| <input type="checkbox"/> | 332211 | | UTC +0:00 | - | Default | Default |
| <input type="checkbox"/> | 445566 | Main | UTC +0:00 | - | Default | Default |

Showing 1 to 5 of 5 entries < 1 >

The Telephony Settings page is described below:

- **DNIS Number:** Defines the Access phone number for the IVR service. e.g., 5555
- **DNIS Name:** Defines the name of the IVR service.
- **Timezone:** Defines the timezone associated with the DNIS number. When calling this number, working hours, holidays and events are checked based on the timezone.
- **Time Of Day Routing Type:** Defines how to handle incoming calls based on working hours. This can be set by editing the three options in the Flow Settings records:

- **Working Hour Set:** Defines which working hour set will be used to define the working/non-working days/time for the flow.
- **Events & Holidays:** Selects the relevant Events and Holidays set. Events and Holidays actions take precedence over Working Hours actions. (see [Defining Events and Holidays](#) on page 90)

Adding a Flow Setting

The procedure below describes how to add a flow setting.

➤ To add a flow setting:

1. Open the Telephony Settings page (**Configuration > Telephony Settings**); the following appears.

Telephony Settings

≡ Flow Settings Details + Add New ⚙ Actions

Show 100 entries Search

| <input type="checkbox"/> | DNIS Number | DNIS Name | Timezone | Time of Day Routing Type | Working Hour Set | Events & Holidays |
|--------------------------|-------------|-----------|------------|--------------------------|------------------|-------------------|
| <input type="checkbox"/> | 123 | 33 | UTC -11:00 | - | Default | Default |
| <input type="checkbox"/> | 12334 | abc | UTC -10:00 | - | Default | Default |
| <input type="checkbox"/> | 112233 | | UTC +0:00 | - | Default | Default |
| <input type="checkbox"/> | 332211 | | UTC +0:00 | - | Default | Default |
| <input type="checkbox"/> | 445566 | Main | UTC +0:00 | - | Default | Default |

Showing 1 to 5 of 5 entries < 1 >

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

Add Telephony Settings

DNIS Number*

DNIS Name

Timezone

Time of Day Routing Type

Events & Holidays*

Actions

Action 1 Data

[Save Changes](#)

3. In the 'DNIS Number' field, enter the access phone number for the IVR service. e.g., 5555.
4. In the 'DNIS Name' field, enter the name of the IVR service.

5. From the 'Timezone' drop-down list, select the timezone associated with the DNIS number. When calling this number, working hours, holidays and events are checked based on the timezone.
6. From the 'Time Of Day Routing Type' drop-down list, select the method for handling incoming calls based on working hours. This can be set by editing the three options in the Flow Settings records:



Events & Holidays actions always take precedence.

- If you select **Working Hours (always on)**, all incoming calls, regardless of any working hours, are always handled according to the 'Actions' configured below.
- If you select **Actionable working hours**, calls are handled based on the working hours. When selecting this option, a Working Hours Set should be selected. All shifts defined in that set are displayed and for each working hour shift, relevant actions can be configured. Relevant actions can be also configured for non-working hours.

Edit Telephony Settings

| | |
|--------------------------|---|
| DNIS Number* | <input type="text" value="445566"/> |
| DNIS Name | <input type="text" value="Main"/> |
| Timezone | <input type="text" value="(UTC +0:00) London"/> |
| Time of Day Routing Type | <input type="text" value="Actionable Working Hours"/> |
| Working Hours Set | <input type="text" value="Shifts"/> |
| Events & Holidays* | <input type="text" value="Default"/> |

Actionable Working Hours

| | | | | | |
|----------|---|-------|-------|------|--|
| — | Sunday | 08:00 | 12:00 | | |
| Action 1 | <input type="text" value="Go to menu"/> | | | Data | <input type="text" value="Emp_or_Dep_Menu"/> |
| — | | 13:00 | 17:00 | | |
| Action 1 | <input type="text" value="Go to menu"/> | | | Data | <input type="text" value="Emp_or_Dep_Menu"/> |
| — | Tuesday | 08:00 | 17:00 | | |
| Action 1 | <input type="text" value="Go to menu"/> | | | Data | <input type="text" value="Emp_or_Dep_Menu"/> |

Actionable Non-Working Hours

| | | | |
|----------|---|------|--|
| Action 1 | <input type="text" value="Go to menu"/> | Data | <input type="text" value="Emp_or_Dep_Menu"/> |
|----------|---|------|--|

[Save Changes](#)

- If you select **Actionable working hours (Emp./Non-Emp)**: Calls are handled based on working hours and whether the caller is an employee or non-employee. When selecting this option, a 'Working Hours Set' option should be selected. All shifts defined in that set are displayed for employees and non-employees. For each working hour shift, relevant actions can be configured. Relevant actions can be also configured for non-working hours for employees and non-employees.

Actionable Working Hours

| | | | | | |
|----------|---------|------------|-------|------|--------------------------|
| — | Tuesday | 00:00 | 12:59 | | |
| Action 1 | | Go to menu | | Data | Default Speech Menu-dept |
| — | | 13:00 | 23:45 | | |
| Action 1 | | Go to menu | | Data | Default Speech Menu-dept |

Actionable Non-Working Hours

| | | | |
|----------|------------|------|--------------------------|
| Action 1 | Go to menu | Data | Default Speech Menu-dept |
|----------|------------|------|--------------------------|

Actionable Working Hours - Non-Emp.

| | | | | | |
|----------|---------|------------|----------|------|--------------------------|
| — | Tuesday | 00:00:00 | 12:59:59 | | |
| Action 1 | | Go to menu | | Data | Default Speech Menu-dept |
| — | | 13:00:00 | 23:45:59 | | |
| Action 1 | | Go to menu | | Data | Default Speech Menu-dept |

Actionable Non-Working Hours - Non-Emp.

| | | | |
|----------|------------|------|--------------------------|
| Action 1 | Go to menu | Data | Default Speech Menu-dept |
|----------|------------|------|--------------------------|

Save Changes

For more information of the possible Actions, see [Actions](#).

7. Add your details, and then 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 Telephony Settings Details page (**Configuration > Telephony Settings**).

Telephony Settings

≡ Flow Settings Details + Add New ⚙ Actions

Show entries Search

| <input type="checkbox"/> | DNIS Number | DNIS Name | Timezone | Time of Day Routing Type | Working Hour Set | Events & Holidays |
|--------------------------|-------------|-----------|------------|--------------------------|------------------|-------------------|
| <input type="checkbox"/> | 123 | 33 | UTC -11:00 | - | Default | Default |
| <input type="checkbox"/> | 12334 | abc | UTC -10:00 | - | Default | Default |
| <input type="checkbox"/> | 112233 | | UTC +0:00 | - | Default | Default |
| <input type="checkbox"/> | 332211 | | UTC +0:00 | - | Default | Default |
| <input type="checkbox"/> | 445566 | Main | UTC +0:00 | - | Default | Default |

Showing 1 to 5 of 5 entries < 1 >

2. Select the Flow Setting you wish to delete by selecting the **Flow Settings** check box, and then From the 'Actions' drop-down menu, choose **Delete Flow Settings**.
3. Click **OK** to delete the selected Flow Setting.

Configuring Menu Settings

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

- DTMF Menu
- Speech Menu

Adding a DTMF Menu

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

➤ To add a DTMF menu:

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

Menu Settings

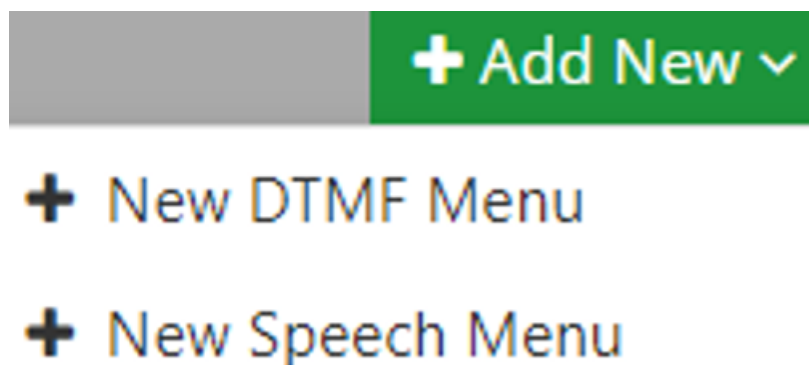
≡ Menu Settings Details + Add New ⚙ Actions

Show entries Search

| <input type="checkbox"/> | Menu ID | Menu Name | Menu Type | Script Type | Language | Status | Last Compiled Time |
|--------------------------|---------|---------------------|-----------|-------------|----------|--------|---------------------|
| <input type="checkbox"/> | 1602 | Default Speech Menu | Speech | VOCANom | EN-US | Ready | 2023-04-15 21:00:25 |
| <input type="checkbox"/> | 1636 | DTMF Menu | DTMF | VocaDTMF | EN-US | | |

Showing 1 to 2 of 2 entries < 1 >

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



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

New Menu Settings

General Settings

| | |
|--|--|
| Menu Name* | <input type="text"/> |
| Menu Prompt* | <input type="text" value="select prompt"/> |
| Menu Dialect* | <input type="text" value="Hebrew"/> |
| Max Wait Time (0-30 secs)* | <input type="text"/> |
| Max Tries (1-7)* | <input type="text"/> |
| Allow transfer to operator* | <input type="text" value="None"/> |
| Timeout Prompt | <input type="text" value="select prompt"/> |
| Attended transfer - No Answer Timeout (0-120 secs) | <input type="text" value="10"/> |

4. From the 'Menu Prompt' drop-down list, select the pre-configured prompt. See [Adding a Voice Prompt](#) on page 42 for more information.
5. From the 'Menu Dialect' drop-down list, select the language of the prompts. The system plays the prompts according to the menu dialect selected.
6. In the 'Max Wait Time' field, enter how much time to wait in seconds (0-30) until the user presses the DTMF.
7. In the 'Max Tries' field, enter how many times to repeat the prompts when there no response from the user.
8. In the 'Operator Extension Working Hours' field, enter the Operator's extension during working hours. This field appears only if the 'Allow transfer to operator' field is set to one of the following values:
 - Anonymous

- Employee
- All

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

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

- Anonymous
- Employee
- All

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

10. From the 'Timeout Prompt' drop-down list, select the prompt in case the user doesn't respond at all and the timeout period expires.
11. Set the 'Attended transfer - No Answer Timeout (0-120 secs)' to the desired value. This parameter is used when 'Attended transfer' is selected as one of the following actions.
12. Under the **Action Settings** group, select the appropriate option. For more information of the possible Actions, see [Actions](#).
13. Click **Save Changes**.

Adding a Speech Menu

The procedure below describes how to add an Interactive Voice Response (IVR) speech menu.

➤ To add a Speech Menu:

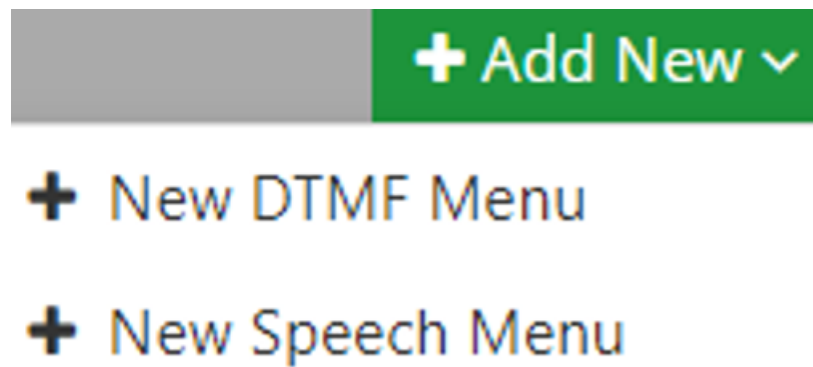
1. Open the Menu Settings page (**Configuration > Menu Settings**); the following example appears.

Menu Settings

| Menu Settings Details | | | | + Add New | Actions |
|---|-----------|-------------|----------|---------------------------|-------------------------|
| Show 100 entries | | Search | | | |
| Menu Name | Menu Type | Script Type | Language | | |
| <input type="checkbox"/> Contacts | Speech | VOCANom | HE-IL | | |
| <input type="checkbox"/> Default Speech Branch Menu | Speech | VOCABranch | HE-IL | | |
| <input type="checkbox"/> Default Speech Menu | Speech | VOCANom | HE-IL | | |
| <input type="checkbox"/> Departments | Speech | VOCANom | HE-IL | | |
| <input type="checkbox"/> Emp_or_Dep_Menu | Speech | VOCANom | HE-IL | | |

Showing 1 to 5 of 5 entries

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



3. Select the + **New Speech Menu**; the New Menu Settings page appears:

New Menu Settings

General Settings

Menu Name*

Dialect*

Dictionaries

First Dictionary*

Second Dictionary*

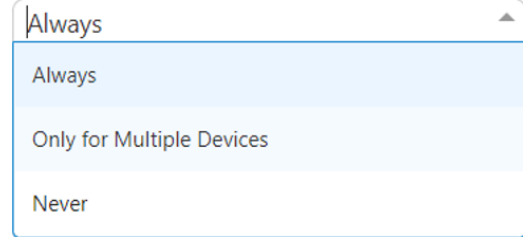
4. Under the **Dictionaries** group, select the 'First Dictionary' and 'Second Dictionary' fields to be used for the menu. The 'Second Dictionary' can be set to "None". The Contact dictionary contains Contact Names without departments. The dictionaries are taken from the Dictionary List in the Department setting that you created.
5. Under the **Prompts Settings** group, select the prompts to play:
- None
 - Anonymous
 - Employees
 - All

Prompts Settings

| | |
|---|-----------------|
| Play time of day* | None ▼ |
| Play selected prompt for company* | None ▼ |
| Play short prompt for* | None ▼ |
| Play beep at the end of prompt* | All ▼ |
| Play the Extension Number* | All ▼ |
| Play the Mobile Number* | All ▼ |
| Play question prompts with* | Contacts only ▼ |
| No. of questions* | 1 |
| Opening Question | Default ▼ |
| Play Phone Device Type When Transferring* | Never ▼ |

- **'Play time of day'**: Select for which group you are playing the time system menu prompts.
- **'Play selected prompt for company'**: Select for which group you are playing the selected prompt.
- **'Play short prompt for'**: Select for which group you are playing the short prompt.
- **'Play beep at the end of prompt'**: Select for which group you are playing the beep prompt.
- **'Play the extension number'**: Select for which group you are playing this.
- **'Play the mobile number'**: Select for which group you are playing this.
- **'Play question prompts with'**: Select for which group you are playing the selected question prompts.
- **The number of questions to be asked (1 to 3)**. This defines how many questions will be asked (opening/second/third questions).
 - ◆ **'Opening Question'**: Select Default or any other pre-recorded prompt.
 - ◆ **'Second Question'**: Select Default or any other pre-recorded prompt.
 - ◆ **'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.

Play Phone Device Type When Transferring*



Always

Always

Only for Multiple Devices

Never

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

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

Additional Settings

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

- 'Play alias before transfer to department' field: select one of the following options:
 - ◆ **Short:** If the alias was recognized, the system plays the recognized alias instead of the Department name before the transfer. If there is disambiguation between departments, the alias is played before playing the disambiguation options.
 - ◆ **Long:** If the alias was recognized, the system plays the recognized alias and the department name before the transfer. If there is disambiguation between departments, the alias is played before playing the disambiguation options.
 - ◆ **Disabled:** Plays only the department name before the transfer. If there is disambiguation, only disambiguation options are played.
- 'Confirm Before Transfer' field: Select which group you are playing this to. If not 'None', the relevant group is asked to confirm the entity they are going to be transferred to.
- 'Allow transfer to mobile phones' field: Select which group you are allowing to transfer calls to mobile devices.


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



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

- 'Operator extension' field: Select the number to dial when the user presses "0" or says "operator".
7. Under the **Call Routing and Hunting - Contact** group from the 'Routing Settings' drop-down list, select either:
- ◆ **Basic routing (default):** The call routing process remains as it is currently set.
 - ◆ **Advanced routing:** The call is set according to the following parameters:

Call Routing and Hunting - Contact

| | |
|---|---|
| Routing Settings | <div>Advanced routing ▾</div> |
| Prompt Before Transfer | <div>▾</div> |
| No Answer Timeout (Sec.)* | <div>120</div> |
| When no Phone Type is Provided (Contacts only)* | <div>Route by phone type priority and hunting ▾</div> |
| Phone Type Priority | <div>Office, Mobile </div> |
| Hunt on No Answer | <input checked="" type="checkbox"/> |
| Hunt on Busy (486) | <input type="checkbox"/> |
| Hunt on Other States (4xx, 5xx, 6xx) | <input type="checkbox"/> |

Actions When Remote Party is not Reachable

| | |
|----------|--------------|
| Action 1 | <div>▾</div> |
| Action 2 | <div>▾</div> |
| Action 3 | <div>▾</div> |

- From the 'Prompt Before Answer' drop-down list, select a prompt from a list of available prompts, before the call is transferred.
- In the 'No answer timeout (0-120 secs)' field, set the time you want the system to wait, for the remote side to answer the call before moving to the next phone type, when hunting or doing an action when the remote party is not reachable.

- From the 'When no Phone Type is Provided' drop-down list, select the appropriate action. When the caller says a Contact's name without requesting a specific phone type, the system can be configured to behave in several different ways:
 - ◆ **Ask for phone type:** The system asks the caller to choose a Phone Type it plays to the caller. Voca transfers the call to the highest priority phone type defined in configuration. If the first priority phone type is not available for a contact, the call is transferred to the second, or third priority. This phone type priority list is configurable.
 - ◆ **Route by phone type priority and hunting:** Voca can perform Call Hunting based on the phone type priority list.
 - In the 'Phone Type Priority' choose the priority list that the system should hunt when routing contact and choose which type of hunt you want to enable.
 - Voca can perform Call Hunting based on the selected option. Configure which of the following states performs the hunting:
 - ◆ Hunt on No Answer
 - ◆ Hunt on Busy (486)
 - ◆ Hunt on Other States (4XX,5XX,6XX)
 - When Voca transfers a call to a destination, the remote side (whether it is a contact or a department) may not be reachable. In such a case, Voca performs pre-defined actions. Under the Actions when Remote Party is not Reachable group, from the 'Action 1' drop- down list, select the appropriate value. For more information of the possible Actions, see [Actions](#).
8. Under the **Call Routing and Hunting - Department** group and from the 'Routing Settings' drop-down list, select either:
- **Basic routing (default):** The call routing process remains as it is currently set.
 - **Advanced:** The call is set according to the following parameters:

Call Routing and Hunting - Department

| | |
|--------------------------------------|-------------------------------------|
| Routing Settings | Advanced routing ▼ |
| Prompt Before Transfer | ▼ |
| No Answer Timeout (Sec.)* | <input type="text" value="10"/> |
| Hunting type* | Main extension first ▼ |
| Hunt on No Answer | <input type="checkbox"/> |
| Hunt on Busy (486) | <input type="checkbox"/> |
| Hunt on Other States (4xx, 5xx, 6xx) | <input type="checkbox"/> |

Actions When Remote Party is not Reachable

| | |
|----------|-----------------|
| Action 1 | ▼ |
| Action 2 | ▼ |
| Action 3 | ▼ |

- From the 'Prompt Before Transfer' drop-down list, select a prompt from a list of available prompts, before the call is transferred.
 - In the 'No answer timeout (0-120 secs)' field, set the time you want the system to wait for the remote side to answer the call, before moving to the next phone type, when hunting or doing an action when the remote party is not reachable.
 - From the 'Hunting type' drop-down list, select one of the options:
 - ◆ **Main extension first:** Select this option when hunting for a free extension always start from Extension 1.
 - ◆ **Round robin:** Select this option when hunting for a free extension. Always start from the extension following the last one used.
 - Voca can perform Call Hunting based on the selected option. Configure which of the following states performs the hunting:
 - ◆ Hunt on No Answer
 - ◆ Hunt on Busy (486)
 - ◆ Hunt on Other States (4XX,5XX,6XX)
9. Under the **Actions when Remote Party is not Reachable** group, from the 'Action 1' drop-down list, select the appropriate value. When Voca transfers a call to a destination, the remote side (whether it is a contact or a department) may not be reachable. In such a case, Voca performs pre-defined actions.
For an explanation of the above actions, see [Actions](#).

10. Under the **DTMF** group, from the 'Collect and route type' drop-down list, select the appropriate value. This is used to collect and route by one or more digits:
- **None (default):** Functionality is disabled.
 - **Transfer to extension:** Instead of saying a contact/department name, you can enter the entity phone number by DTMF and selecting either:
 - ◆ Minimum length of extension number
 - ◆ Maximum length of extension number

DTMF

| | |
|------------------------|--|
| Collect and route type | <div>Transfer to extension ▼</div> |
| | The minimum length of extension number <div>1</div> AND |
| | The maximum length of extension number <div>1</div> |
| DTMF keys Type | <div>None ▼</div> |

- **Transfer by DTMF routing key:** The collected digits are used to route the call to the contact or department tagged with the same DTMF routing key:
 - ◆ The minimum length of routing key
 - ◆ The maximum length of routing key
11. Under the **DTMF** group, from the 'DTMF keys Type' drop-down list, select **Second Language**. This option maps actions for DTMF keys. If this option is activated, the 'Collect and route type' field cannot be configured to collect only one digit. Select one of the following:
- **DTMF:** Configures the DTMF key that is pressed to trigger the required behavior
 - **Behavior:** Defines the behavior of the DTMF key:
 - ◆ **Operator:** The call is diverted to the operator
 - ◆ **Go to menu:** The call is diverted to another menu

Editing Menu Settings

The procedure below describes how to edit menu settings.

➤ To edit menu settings:

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

Figure 6-1:

Menu Settings

Menu Settings Details

Show 100 entries

Search:

| <input type="checkbox"/> | Menu ID | Menu Name | Menu Type | Script Type | Language | Status | Last Compiled Time |
|--------------------------|---------|----------------------|-----------|-------------|----------|--------|---------------------|
| <input type="checkbox"/> | 882 | Default Speech Menu | Speech | VOCANom | EN-US | Ready | 2023-04-24 11:17:57 |
| <input type="checkbox"/> | 894 | Collect | DTMF | VocaDTMF | EN-US | | |
| <input type="checkbox"/> | 956 | Menu1 | DTMF | VocaDTMF | EN-US | | |
| <input type="checkbox"/> | 1120 | Transfer to Teams VM | DTMF | VocaDTMF | EN-US | | |

Showing 1 to 4 of 4 entries

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

Figure 6-2:

Menu Settings

Menu Settings Details

Show 100 entries

Search:

| <input type="checkbox"/> | Menu ID | Menu Name | Menu Type | Script Type | Language | Status | Last Compiled Time |
|-------------------------------------|---------|----------------------|-----------|-------------|----------|--------|---------------------|
| <input checked="" type="checkbox"/> | 882 | Default Speech Menu | Speech | VOCANom | EN-US | Ready | 2023-04-24 11:17:57 |
| <input type="checkbox"/> | 894 | Collect | DTMF | VocaDTMF | EN-US | | |
| <input type="checkbox"/> | 956 | Menu1 | DTMF | VocaDTMF | EN-US | | |
| <input type="checkbox"/> | 1120 | Transfer to Teams VM | DTMF | VocaDTMF | EN-US | | |

Showing 1 to 4 of 4 entries

Actions

- Edit Menu
- Delete Menu
- Recompile

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

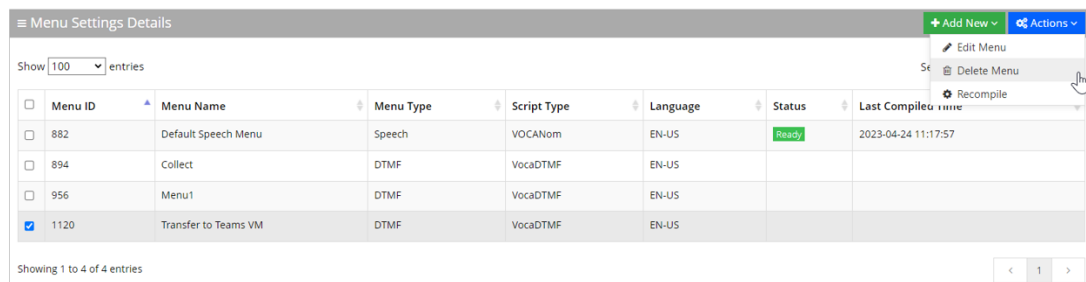
Deleting Menu Settings

The procedure below describes how to delete menu settings.

➤ To delete menu settings:

1. Open the Menu Settings screen (**Configuration > Menu Settings**); the following screen example appears:
2. Enable the menu check box that you wish to delete.
3. Click **Actions**; the following appears.

Menu Settings



| Menu Settings Details | | | | | | | |
|-----------------------|----------------------|-----------|-------------|----------|--------|---------------------|------|
| Menu ID | Menu Name | Menu Type | Script Type | Language | Status | Last Compiled | Time |
| 882 | Default Speech Menu | Speech | VOCANom | EN-US | Ready | 2023-04-24 11:17:57 | |
| 894 | Collect | DTMF | VocaDTMF | EN-US | | | |
| 956 | Menu1 | DTMF | VocaDTMF | EN-US | | | |
| 1120 | Transfer to Teams VM | DTMF | VocaDTMF | EN-US | | | |

Showing 1 to 4 of 4 entries

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

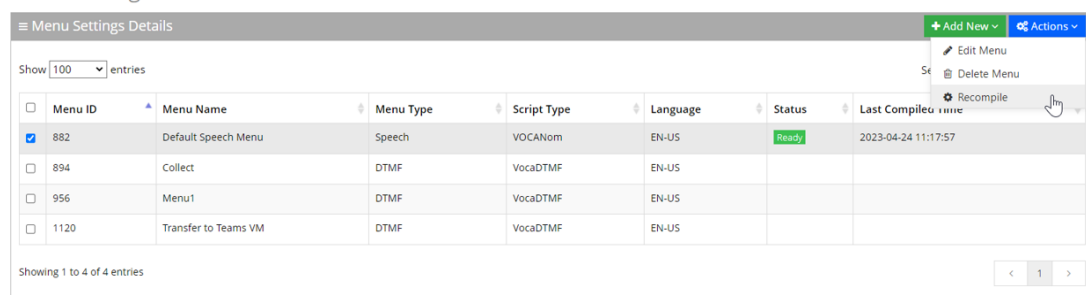
Recompile Menu

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

➤ To recompile menus:

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

Menu Settings



| Menu Settings Details | | | | | | | |
|-----------------------|----------------------|-----------|-------------|----------|--------|---------------------|------|
| Menu ID | Menu Name | Menu Type | Script Type | Language | Status | Last Compiled | Time |
| 882 | Default Speech Menu | Speech | VOCANom | EN-US | Ready | 2023-04-24 11:17:57 | |
| 894 | Collect | DTMF | VocaDTMF | EN-US | | | |
| 956 | Menu1 | DTMF | VocaDTMF | EN-US | | | |
| 1120 | Transfer to Teams VM | DTMF | VocaDTMF | EN-US | | | |

Showing 1 to 4 of 4 entries

The following columns show the compilation status:

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

- **Last compilation time:** Last time of menu compilation
4. To trigger a new compilation, select **Actions**, and then click **Recompile**.

Configuring Routing

The procedures below describe how to manage workers and skill-based routing.

One of Voca's conversational interaction center capabilities is to route calls to workers, based on their availability and skill sets.

The Administrator can configure the skill-based routing logic based on the following flow:

- Skills
- Workers
- Worker status events
- Worker group
- Queues



Pre-requisites for using skill-based routing:

- Direct Routing SBC connected to Microsoft Teams tenant
- Microsoft Teams user with phone system license
- HTTPS connectivity (Port 8443) between the agent desktop client network to Voca
- The organization Administrator (Microsoft 365) should grant tenant-wide Administrator consent to the agent application on behalf of the organization.

Use the following link to grant consent (replace {tenant_id} with the organization Azure Tenant ID): https://login.microsoftonline.com/{Tenant_ID}/adminconsent?client_id=77f087b6-9731-4bb7-a6fa-7d3d0bccd725&redirect_uri=https://voca-workerapp.audiocodes.io/

Configuring Skills

Skills are customer-definable labels assigned to workers. The Voca Interaction Center can route incoming calls to workers who have the necessary skills or sets of skills to handle the call.

Adding a Skill

The procedure below describes how to add a Skill.

➤ To add a skill:

1. Open the Skills page (**Configuration > Routing > Skills**); the following appears:

Skills

≡ Skills + Add New Actions

Show 100 entries Search:

| <input type="checkbox"/> Skill Name | Description |
|-------------------------------------|-------------|
| No data available in table | |

Showing 0 to 0 of 0 entries < 1 >

- Click **Add New**; the following appears:

New Skill

Name*

Description

Save Changes

- In the 'Name' field, enter the name of the skill (e.g., "Excel").
- In the 'Description' field, enter a description of the skill (e.g., "Power user of Excel").
- Click **Save Changes**.

Editing a Skill

Editing a Skill

The procedure below describes how to edit a Skill.

➤ To edit a Skill:

- Open the Skills page (**Configuration > Routing > Skills**); the following appears:

Skills

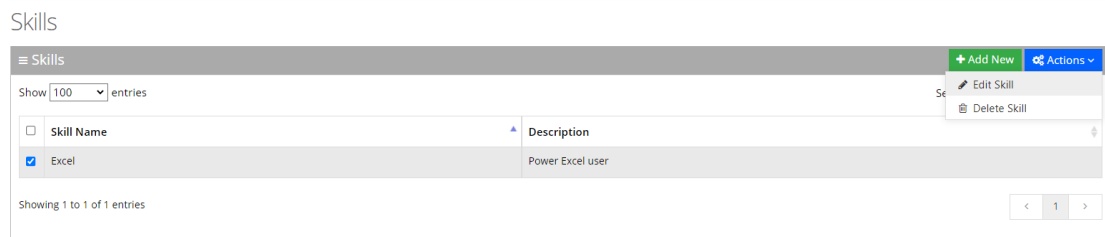
≡ Skills + Add New Actions

Show 100 entries Search:

| <input type="checkbox"/> Skill Name | Description |
|-------------------------------------|------------------|
| <input type="checkbox"/> Excel | Power Excel user |

Showing 1 to 1 of 1 entries < 1 >

- Select the Skill you wish to edit by selecting the corresponding check box.



- From the 'Actions' drop-down menu, choose **Edit Skill**; the following appears:

Edit Skill

Name*

Description

[Save Changes](#)

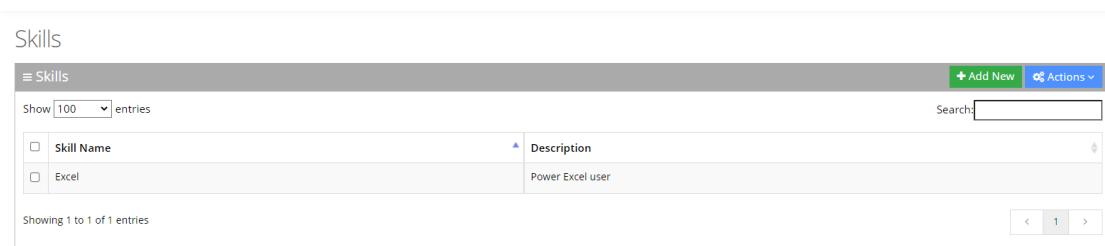
- Make your necessary changes, and then click **Save Changes**.

Deleting a Skill

The procedure below describes how to delete a Skill.

➤ To delete a Skill:

- Open the Skills page (**Configuration > Routing > Skills**); the following appears:



- Select the Skill you wish to delete by selecting the corresponding check box.
- From the 'Actions' drop-down menu, choose **Delete Skill**.

Skills

| Skills | | + Add New | ⚙ Actions |
|---|-------------------------------------|-----------|-----------|
| Show 100 entries | <input type="text" value="Search"/> | | |
| <input type="checkbox"/> Skill Name | Description | | |
| <input checked="" type="checkbox"/> Excel | Power Excel user | | |

Showing 1 to 1 of 1 entries

< 1 >

A confirmation message box appears.

- Click **OK** to confirm deletion.

Configuring Workers

A Worker is a user that is available to handle incoming calls based on the worker's queue registration and skill sets.

When configuring a Worker, the administrator needs to create a Worker that has a 'Worker Type' with a value of **Worker** or **Supervisor**.



When the administrator adds a new Worker with a 'Worker Type' with a value of **Supervisor**, it means that the supervisor not only has also worker capabilities to handle calls, but can also can manage and monitor that supervisor's workers.

Adding a Worker

The procedure below describes how add a Worker or Supervisor.

➤ To add a Worker:

- Open the Workers page (**Configuration > Routing > Workers**); the following appears:

Workers

| Workers | | | | | + Add New | ⚙ Actions |
|-------------------------------------|-----------|-------|------------------|--|------------------------------|-----------|
| Show 100 entries | | | | | Search: <input type="text"/> | |
| <input type="checkbox"/> First Name | Last Name | Email | Worker Extension | | | |
| No data available in table | | | | | | |

Showing 0 to 0 of 0 entries

< >

- Click **Add New**; the following appears:

New Worker

First Name*

Last Name*

Email*


Worker Extension*


Location


Worker Type

Enable Queue Missed Calls View ☐

Assigned Skills

Skill* Score* 



3. In the 'First Name' field, enter the first name of the Worker.
4. In the 'Last Name' field, enter the last name of the Worker.
5. In the 'Email' field, enter the email address of the Worker.
6. In the 'Worker Extension' field, enter the phone extension of the Worker.
7. In the 'Location' field, enter the location of the Worker.
8. From the 'Worker Type' drop-down list, select the Worker Type.
9. Select the 'Allow Supervisor Web Management Access' check box (for Worker Type: Supervisor only) to enable the Supervisor to log in to the **Voca Web Management** interface.
10. Select the 'Enable Queue Missed Calls View' check box, to enable the Supervisor to view missed calls through the **Supervisor Statistics** tab in the Worker App.
11. Under the **Assigned Skills** group, from the 'Skill' drop-down list, select the skill you wish to assign to the Worker, and then, in the 'Score' field, enter the competence level assigned for that skill.
12. Click  to assign another skill to this Worker.
13. Click **Save Changes**.



Supervisors with 'Allow Supervisors Web Management Access' set to enabled, are allowed to view/edit the following pages:

- Basic queues that the Supervisor is assigned to as a Supervisor (see [Configuring Call Queues](#) on page 74)
- Skill-based queues their supervised Workers (in relevant Worker Groups) relate to
- All Tenant Workers
- Worker Groups they supervise
- Relevant Reports

Editing a Worker

The procedure below describes how to edit a Worker.

➤ To edit a Worker:

1. Open the Workers page (**Configuration > Routing > Workers**); the following appears:

Workers

| Workers | | | | + Add New | ⚙ Actions ▾ |
|-----------------------------|------------|------------------------------|-----------------------|------------------|-------------|
| Show 100 ▾ entries | | Search: <input type="text"/> | | | |
| <input type="checkbox"/> | First Name | Last Name | Email | Worker Extension | |
| <input type="checkbox"/> | Bruce | David | bruce@david.gmail.com | 1234 | |
| Showing 1 to 1 of 1 entries | | | | | |
| | | | | < | 1 > |

2. Select the Worker you wish to edit by selecting the corresponding check box.

Workers

| Workers | | | | + Add New | ⚙ Actions ▾ |
|-------------------------------------|------------|------------------------------|-----------------------|------------------|-------------|
| Show 100 ▾ entries | | Search: <input type="text"/> | | | |
| <input type="checkbox"/> | First Name | Last Name | Email | Worker Extension | |
| <input checked="" type="checkbox"/> | Bruce | David | bruce@david.gmail.com | 1234 | |
| Showing 1 to 1 of 1 entries | | | | | |
| | | | | < | 1 > |

3. From the 'Actions' drop-down menu, choose **Edit Worker**.

Edit Worker

| | |
|-------------------|--|
| First Name* | <input type="text" value="Bruce"/> |
| Last Name* | <input type="text" value="David"/> |
| Email* | <input type="text" value="bruce@david.gmail.com"/> |
| Worker Extension* | <input type="text" value="1234"/> |
| Location | <input type="text" value="Head Office"/> |
| Worker Type | <input type="text" value="Supervisor"/> |

Assigned Skills

| | | | | |
|--------|------------------------------------|--------|---------------------------------|---|
| Skill* | <input type="text" value="Excel"/> | Score* | <input type="text" value="10"/> |  |
|--------|------------------------------------|--------|---------------------------------|---|

Save Changes

4. Make your necessary changes, and then click **Save Changes**.



Deleting a Worker

The procedure below describes how to delete a Worker.

➤ To delete a Worker:

1. Open the Workers page (**Configuration > Routing > Workers**); the following appears:

Workers

| Workers | | | |  |  |
|---|------------|-----------|-----------------------|---|---|
| Show <input type="text" value="100"/> entries | | | | Search: <input type="text"/> | |
| <input type="checkbox"/> | First Name | Last Name | Email | Worker Extension | |
| <input type="checkbox"/> | Bruce | David | bruce@david.gmail.com | 1234 | |
| Showing 1 to 1 of 1 entries | | | | <input type="button" value="1"/> | |

2. Select the Worker you wish to delete by selecting the corresponding check box.
3. From the 'Actions' drop-down menu, choose **Delete Worker**.

Workers

| Workers | | | | + Add New Actions |
|-------------------------------------|------------|-----------|-----------------------|---|
| Show | 100 | entries | | |
| <input type="checkbox"/> | First Name | Last Name | Email | Worker Extension |
| <input checked="" type="checkbox"/> | Bruce | David | bruce@david.gmail.com | 1234 |

Showing 1 to 1 of 1 entries

< 1 >

A confirmation message box appears.

- Click **OK** to confirm deletion.



- At least one skill must be selected if the user is defined as a Worker.
- The Administrator can set different score levels for each Worker's skill that has been selected (The Score level indicates the Worker's level of expertise in that skill).

Configuring Worker Status Events

The Administrator can create and manage Worker events (e.g., Not Ready / Wrap-up codes) for finalizing calls.

Wrap-Up Reason Codes:

- Represent the reasons for whenever a Worker ends an interaction but isn't ready yet to take the next one.
- The wrap-up codes are automatically populated to the Worker application per the incoming call to the queue.

Not Ready Reason Codes:

- The Administrator configures these codes in Voca and automatically populate the Worker application.
- They represent the reasons that Workers can select when they change their state to **Not Ready**. This is reflected in the reports.



Before ending the call, the Worker must select the relevant Wrap-up Reason code from the available list before the interaction is ended. The call is then disconnected automatically after the timer has reached its limit, or otherwise, the Worker can hang up the call manually by pressing the **Hang up** button.

For a Worker application intuitive experience, the Voca Interaction Center provides the following built-in Not-ready system default states that are reflected in the reports.

- Shift Start:** Worker automatic state after login

- **Shift End:** Worker must select this state before logout (if not selected, the “logout” button is locked)
- **Call Not Answered:** This happens when the worker was in ready state and didn't answer to incoming call.
- **Engaged:** Call is ringing
- **Talking:** Worker is on active call

Adding Worker Status Events

The procedure below describes how to add a Worker Status Event.

➤ To add a Worker status event:

1. Open the Worker Status Events page (**Configuration > Routing > Worker Status Event**); the following appears:

The screenshot shows the 'Worker Status Events' page. At the top, there is a header bar with a menu icon, the title 'Worker Status Events', a green '+ Add New' button, and a blue 'Actions' dropdown button. Below the header, there is a search bar and a table. The table has two columns: 'Group Name' and 'Event Type'. The table is currently empty, with the text 'No data available in table' displayed. At the bottom of the table, it says 'Showing 0 to 0 of 0 entries'.

2. Click **Add new**; the following appears:

The screenshot shows the 'Worker Status Events' page with the '+ Add New' button dropdown menu open. The menu lists two options: '+ Wrap-up Event' and '+ Not Ready Event'. The rest of the page, including the search bar, table, and pagination, remains the same as in the previous screenshot.

3. Select the type of event.
4. In the **Wrap-up Event**, enter the 'Group Name' and 'Event Name' in the appropriate fields.

New Worker Status Event

Wrap-up Group Name*

Final Steps

Wrap-up Events

Event Name*

Documentataion

Time (Sec.)

60



Save Changes



If the event type is set to 'Wrap-up', the “Wrap-up max. Time Limit (Secs)” appears.

5. In the **Not Ready Event**, enter the 'Group Name' and 'Event Name' in the appropriate fields.

New Worker Status Event

Not Ready Group Name*

Default


Not Ready Events

Event Name*

Having a break



Save Changes

6. Click  to add additional events.
7. Click **Save Changes**.

Editing Worker Status Events

The procedure below describes how to edit a Worker Status Event.

➤ **To edit a Worker Status Event:**

1. Open the Worker Status Events page (**Configuration > Routing > Worker Status Events**); the following appears:

Worker Status Events

Worker Status Events

[+ Add New](#)
[⚙ Actions](#)

Show entries Search:

| <input type="checkbox"/> Group Name | Event Type |
|--------------------------------------|------------|
| <input type="checkbox"/> Extra | Not Ready |
| <input type="checkbox"/> Final Steps | Wrap Up |

Showing 1 to 2 of 2 entries < 1 >

2. Select the event you wish to edit by selecting the corresponding check box.

Worker Status Events

Worker Status Events

[+ Add New](#)
[⚙ Actions](#)

Show entries Search:

| <input type="checkbox"/> Group Name | Event Type |
|---|------------|
| <input checked="" type="checkbox"/> Extra | Not Ready |
| <input type="checkbox"/> Final Steps | Wrap Up |

Showing 1 to 2 of 2 entries < 1 >

[Edit Worker Status Event](#)
[Delete Worker Status Event\(s\)](#)

3. From the 'Actions' drop-down menu, select **Edit Worker Status Event**; the following appears:

Edit Worker Status Event

Not Ready Group Name*

Not Ready Events

Event Name* [+](#)

[Save Changes](#)

4. Make your necessary changes, and then click **Save Changes**.

Deleting Worker Status Events

The procedure below describes how to delete a Worker Status Event.

➤ **To delete a Worker Status Event:**

1. Open the Worker Status Events page (**Configuration > Routing > Worker Status Events**); the following appears:

Worker Status Events

| Worker Status Events | | + Add New | Actions |
|--------------------------------------|-------------------------------------|----------------------------------|---------|
| Show 100 entries | Search: | | |
| <input type="checkbox"/> Group Name | <input type="checkbox"/> Event Type | | |
| <input type="checkbox"/> Extra | Not Ready | | |
| <input type="checkbox"/> Final Steps | Wrap Up | | |
| Showing 1 to 2 of 2 entries | | <input type="button" value="1"/> | |

2. Select the Worker Status Event you wish to delete by selecting the corresponding check box.
3. From the 'Actions' drop-down menu, choose **Delete Worker Status Event(s)**.

Worker Status Events

| Worker Status Events | | + Add New | Actions |
|---|--|----------------------------------|---------|
| Show 100 entries | <input type="button" value="Edit Worker Status Event"/> <input type="button" value="Delete Worker Status Event(s)"/> | | |
| <input type="checkbox"/> Group Name | <input type="checkbox"/> Event Type | | |
| <input checked="" type="checkbox"/> Extra | Not Ready | | |
| <input type="checkbox"/> Final Steps | Wrap Up | | |
| Showing 1 to 2 of 2 entries | | <input type="button" value="1"/> | |

A confirmation message box appears.

4. Click **OK** to confirm deletion.

Configuring Workers Group

The Administrator can create or associate Workers, supervisors and Not Ready reason code events to a group. This group is only for viewing and management of Supervisor or Worker statistics from the Supervisor app. The Worker and Supervisor will inherit the "Not Ready" reason codes from this group.



- Workers can be assigned to only one group.
- A Worker Group can only contain one Not-Ready Status event.


Adding a Worker Group

The procedure below describes how to add a Workers Group.

➤ To add a Workers Group:

1. Open the Workers Group page (**Configuration > Routing > Workers Group**); the following appears:

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

3. In the 'Group Name' field, enter the name of the Group.
4. In the 'Description' field, enter a description of the Group.
5. From the 'Not Ready Status Group' drop-down list, select the appropriate value.
6. From the 'Supervisor' drop-down list, select the Supervisor name of the group.
7. From the 'Worker' drop-down list, select the appropriate Worker name.
8. Click  to add additional Supervisors or Workers.
9. Click **Save Changes**.

Editing a Worker Group

The procedure below describes how to edit a Workers Group.

➤ To edit a Workers Group:

1. Open the Workers Group page (**Configuration > Routing > Workers Group**); the following appears:

Workers Group

Workers Group

[+ Add New](#)
[⚙ Actions](#)

Show 100 entries Search:

| <input type="checkbox"/> | Group Name | Description |
|--------------------------|-------------|---------------|
| <input type="checkbox"/> | New Group 1 | David's Group |

Showing 1 to 1 of 1 entries

2. Select the Workers Group you wish to edit by selecting the corresponding check box.

Workers Group

Workers Group

[+ Add New](#)
[⚙ Actions](#)

Show 100 entries Search:

| <input type="checkbox"/> | Group Name | Description |
|-------------------------------------|-------------|---------------|
| <input checked="" type="checkbox"/> | New Group 1 | David's Group |

Showing 1 to 1 of 1 entries

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

Edit Workers Group

Group Name*

New Group 1

Description*

David's Group

Not Ready Status Group

Extra

Supervisors

Supervisor*

Bruce David

+

Supervised Workers

Worker*

Rachel Nice

+

Save Changes

4. Make your necessary changes, and then click **Save Changes**.

Deleting a Worker Group

The procedure below describes how to delete a Workers Group.

➤ To delete a Workers Group:

1. Open the Workers Group page (**Configuration > Routing > Workers Group**); the following appears:

Workers Group

Workers Group + Add New ⚙ Actions

Show 100 entries Search:

| <input type="checkbox"/> | Group Name | Description |
|--------------------------|-------------|---------------|
| <input type="checkbox"/> | New Group 1 | David's Group |

Showing 1 to 1 of 1 entries < 1 >

2. Select the Workers Group you wish to delete by selecting the Workers Group check box.
3. From the 'Actions' drop-down menu, choose **Delete Work Group**.

Workers Group

Workers Group + Add New ⚙ Actions

Show 100 entries Se

| <input type="checkbox"/> | Group Name | Description |
|-------------------------------------|-------------|---------------|
| <input checked="" type="checkbox"/> | New Group 1 | David's Group |

Showing 1 to 1 of 1 entries < 1 >

Se ⚙ Edit Workers Group
🗑 Delete Workers Group(s)

A confirmation message box appears.

4. Click **OK** to confirm deletion.

Configuring Queues

This section deals with how to configure the following Queues:

- **Call Queues:** This queue type is used for informal agents that use their Team's client or any other third-party extension.
- **Skill-Based Routing Queues:** This queue type is used for formal agents that are using the Voca Worker App.

Configuring Call Queues

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

Adding a Call Queue

The procedure below describes how to add a new Call Queue.

➤ To add a new Call Queue:

1. Open the Call Queues page (**Configuration > Routing > Queues**); the following appears:

Queues

≡ Call Queues + Add New ⚙ Actions

Show entries Search:

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|----------------------------|------------|-------------|-----------------|--------------------------|--------------|------------|
| No data available in table | | | | | | |

Showing 0 to 0 of 0 entries < >

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

Queues

≡ Call Queues + Add New ⚙ Actions

Show entries Search:

+ Add Queue
+ Add Skill-based Routing Queue

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|----------------------------|------------|-------------|-----------------|--------------------------|--------------|------------|
| No data available in table | | | | | | |

Showing 0 to 0 of 0 entries < >

3. Click **Add Queue**; the following appears:

New Basic Queue

| | |
|---|--|
| Name* | <input type="text"/> |
| Description | <input type="text"/> |
| Greeting | <div>None ▾</div> |
| Music on Hold | <div>Default ▾</div> |
| Routing Type | <div>Round Robin ▾</div> |
| No Answer Timeout (Sec.) | <div>30</div> |
| Supervisors | <div>No supervisor ▾ +</div> |
| Queue Members ^① | <div>no-member no-extension ▾ +</div> |
| Allow Routing on Teams Presence Status | <input checked="" type="checkbox"/> ✔ Available <input type="checkbox"/> ● Busy <input type="checkbox"/> ● Away |
| Overflow Call When All Queue Members Are | <input type="checkbox"/> |
| Maximum Calls in Queue | <div>50</div> |
| When the maximum number of calls is reached | |
| Action 1 | <div>Disconnect ▾</div> |
| Maximum Wait Time (Min.) | <div>20</div> |
| When the maximum wait time is reached | |
| Action 1 | <div>Disconnect ▾</div> |

① To allow Teams Presence-based routing for Queue members, please ensure "Presence-based routing" is enabled for the relevant Voca Contact in the Contacts section

Save Changes

4. In the 'Name' field, enter the name of the queue.
5. In the 'Description' field, enter the a short description for the queue.
6. From the 'Greeting' drop-down list, select the greeting that will be play when the call enters the queue.
7. From the 'Music on Hold' drop-down list, select the music on hold that will be play when the caller waiting in the queue.
8. From the 'Routing Type' drop-down list, select the appropriate routing type:
 - **Round Robin (default):** Sequentially hunt for each queue member
 - **Serial:** Hunt each queue member starting from the first queue member

- **Broadcast:** Simultaneously ring for all the queue members
9. In the 'No Answer Timeout(Sec.)' field, enter the ringing time at the destination after which the call is considered as not answered by the destination.
 10. From the 'Supervisors' drop-down list, select a Supervisor (see [Step 9](#) in Adding a Worker).
 11. From the 'Queue Members' drop-down list, select either a contact name or enter a E.164 number. If a contact is selected and a presence is activated for that contact, the relevant presence will be queried before trying to transfer to this destination.
 12. In the 'Allow Routing on Teams Presence Status' check box, enable or disable for which Teams Presence Status the call should transfer. Available is always marked for transfer.
 13. In the 'Overflow Call When All Queue Members Are ' check box, enable or disable the admin can choose on which Teams presence status will be considered as logged out. When all the queue members meet the selected presence status the caller will automatically transfer to the relevant action that configured in the 'When overflow condition is set'.

Overflow Call When All Queue Members Are



☐ Offline

☐ Away

☐ Do Not Disturb

When overflow condition is set

Action 1

Do nothing

|

For more information of the possible Actions, see [Actions](#).

14. In the 'Maximum Call in Queue' field, enter the maximum number of calls that can wait in the queue (between 1 to 99). When the maximum number of calls has been reached, the caller will automatically transfer to the relevant action that configured in the 'When the maximum number of calls is reached'.

Maximum Calls in Queue

50

When the maximum number of calls is reached

Action 1

Do nothing

|

For more information of the possible Actions, see [Actions](#).



This limit requires the same or higher licensed channels.

- In the 'Maximum Wait Time (Min.)' field, enter the maximum time for a call to be waiting in the queue. When the maximum wait time has been reached, the caller will automatically be transferred to the relevant action configured in the 'When the maximum wait time is reached' field.

Maximum Wait Time (Min.)

When the maximum wait time is reached

Action 1 Data

For more information of the possible Actions, see [Actions](#).

- Click **Save Changes**.

Editing a Call Queues

The procedure below describes how to edit a Call Queue.

➤ To edit a Call Queue:

- Open the Call Queue page (**Configuration > Routing > Queues**); the following appears:

Queues

| Call Queues | | | | | | | + Add New | ⚙ Actions |
|--------------------------|--------------|------------------------------------|-----------------|--------------------------|--------------|------------|-----------|-----------|
| Show 100 entries | | | | | | | Search: | |
| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type | | |
| <input type="checkbox"/> | Call Queue 1 | The first call queue in the region | 50 | 20 | Round Robin | Simple | | |

Showing 1 to 1 of 1 entries

- Select the Call Queue you wish to edit by selecting the corresponding Call Queue check box.




Queues


| Call Queues | | | | | | | + Add New | ⚙ Actions |
|-------------------------------------|--------------|------------------------------------|-----------------|--------------------------|--------------|------------|-----------|-----------|
| Show 100 entries | | | | | | | Search: | |
| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type | | |
| <input checked="" type="checkbox"/> | Call Queue 1 | The first call queue in the region | 50 | 20 | Round Robin | Simple | | |

Showing 1 to 1 of 1 entries

- From the 'Actions' drop-down menu, choose **Edit Queue**; the following appears:

New Basic Queue

| | |
|---|---|
| Name* | <input type="text"/> |
| Description | <input type="text"/> |
| Greeting | <input type="text" value="None"/> |
| Music on Hold | <input type="text" value="Default"/> |
| Routing Type | <input type="text" value="Round Robin"/> |
| No Answer Timeout (Sec.) | <input type="text" value="30"/> |
| Supervisors | <input type="text" value="No supervisor"/>  |
| Queue Members  | <input type="text" value="no-member no-extension"/>  |
| Allow Routing on Teams Presence Status | <input checked="" type="checkbox"/> Available <input type="checkbox"/> Busy <input type="checkbox"/> Away |
| Overflow Call When All Queue Members Are | <input type="checkbox"/> |
| Maximum Calls in Queue | <input type="text" value="50"/> |
| When the maximum number of calls is reached | |
| Action 1 | <input type="text" value="Disconnect"/> |
| Maximum Wait Time (Min.) | <input type="text" value="20"/> |
| When the maximum wait time is reached | |
| Action 1 | <input type="text" value="Disconnect"/> |

 To allow Teams Presence-based routing for Queue members, please ensure "Presence-based routing" is enabled for the relevant Voca Contact in the Contacts section

[Save Changes](#)

4. Make your necessary changes, and then click **Save Changes**.

Deleting a Call Queue

The procedure below describes how to delete a Call Queue.

➤ To delete a Call Queue:

1. Open the Call Queues page (**Configuration > Routing > Queues**); the following appears:

Queues

Call Queues

Show 100 entries

Search:

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|--------------------------|--------------|------------------------------------|-----------------|--------------------------|--------------|------------|
| <input type="checkbox"/> | Call Queue 1 | The first call queue in the region | 50 | 20 | Round Robin | Simple |

Showing 1 to 1 of 1 entries

< 1 >

2. Select the Call Queue you wish to delete by selecting the corresponding check box.
3. From the 'Actions' drop-down menu, choose **Delete Queue(s)**.

Queues

Call Queues

Show 100 entries

Search:

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|-------------------------------------|--------------|------------------------------------|-----------------|--------------------------|--------------|------------|
| <input checked="" type="checkbox"/> | Call Queue 1 | The first call queue in the region | 50 | 20 | Round Robin | Simple |

Showing 1 to 1 of 1 entries

< 1 >

A confirmation box appears.

4. Click **OK** to confirm deletion.



- When deleting a queue, the system checks if the queue is already used in any related transfer to queue actions.
- If the queue is in use, the delete request is denied with an appropriate message.

Configuring Skill-Based Routing Queues

Skill-based Routing Queues provide a method of intelligent routing of callers to Workers when they all registered to the queue to handle caller requests. With this skill-based routing capability, the Administrator can ensure that the call routing strategy, where customers are associated to workers with the most relevant skills to handle their requests, is based on their availability and skills required.

Adding a Skill-Based Routing Queue

The procedure below describes how to add a new Skill-Based Routing Queue.

➤ To add a new Skill-Based Routing Queue:

1. Open the Call Queues page(**Configuration > Routing > Queues**); the following appears:

Queues

Call Queues

Show 100 entries

Search:

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|----------------------------|------------|-------------|-----------------|--------------------------|--------------|------------|
| No data available in table | | | | | | |

Showing 0 to 0 of 0 entries

< >

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

Queues

≡ Call Queues + Add New ▼ ⚙️ Actions ▼

Show 100 ▼ entries

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|----------------------------|------------|-------------|-----------------|--------------------------|--------------|------------|
| No data available in table | | | | | | |

Showing 0 to 0 of 0 entries < >

3. Click **Add Skill-based Routing Queue**; the following appears:

New Skill Based Routing Queue

Name*

Queue Number

Description

Greeting None ▼

Music on Hold Default ▼

Routing Type Round Robin ▼

Workers* +

Wrap-up Events Group None ▼

Maximum Calls in Queue

When the maximum number of calls is reached

Action 1 Disconnect ▼

Maximum Wait Time (Min.)

When the maximum wait time is reached

Action 1 Disconnect ▼

Check for logged out workers ☐

Save Changes

4. In the 'Name' field, enter the name of the Queue.
5. In the 'Queue Number' field, enter the desired number that will be displayed on the customer's side when workers make outbound calls via the queue.
6. In the 'Description' field, enter a short description for the Queue.

7. From the 'Greeting' drop-down list, select the greeting to be played when the call enters the Queue.
8. From the 'Music on Hold' drop-down list, select the music on hold to be played while the caller is waiting in the Queue.
9. From the 'Routing Type' drop-down list, select the appropriate routing type:
 - **Round Robin (default):** Sequentially hunts for a Worker within the queue.
 - **Longest Available Worker:** Defines the Worker that has been idle for the longest amount of time.
 - **Skill-based Priority Routing:** Routing calls based on the Worker level of expertise (Score level for each skill).
10. From the 'Worker' drop-down list, select the appropriate Worker name.
11. From the 'Wrap-up Events Group' drop-down list, select the appropriate value.



Wrap-up codes will be listed in the Worker app, per the incoming call selected queue.

12. In the 'Maximum Call in Queue' field, enter the maximum number of calls that can wait in the queue (between 1 to 99). When the maximum number of calls has been reached, the caller will automatically transfer to the relevant action that configured in the 'When the maximum number of calls is reached'.

Maximum Calls in Queue

When the maximum number of calls is reached

Action 1

Do nothing

For more information of the possible Actions, see [Actions](#).



This limit requires the same or more licensed channels.

13. In the 'Maximum Wait Time (Min.)' field, enter the maximum time for a call to be waiting in the queue. When the maximum wait time has been reached, the caller is automatically transferred to the relevant action that are configured in the 'When the maximum wait time is reached' field.

Maximum Wait Time (Min.)

1

When the maximum wait time is reached

Action 1

Transfer to Queue

Data

Broadcast1

14. For more information of the possible Actions, see [Actions](#).

15. Enable the 'Check for logged out Workers' check box, if you want to configure an overflow action if all the workers are logged out.

Check for logged out workers



When all workers in the queue are logged out

Action 1

Do nothing

16. Click **Save Changes**.

Editing a Skill-Based Routing Queue

The procedure below describes how to edit a skill-based Routing Queue.

To edit a skill-based Routing Queue:

1. Open the Call Queue page (**Configuration > Routing > Queues**); the following appears:

Queues

Call Queues

+ Add New

Actions

Show100entries

Search

| | | | | | | |
|--------------------------|------------|-------------|-----------------|--------------------------|--------------------------|-------------------|
| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
| <input type="checkbox"/> | Helpdesk | Helpdesk | 50 | 20 | Longest Available Worker | Skill-based-Queue |
| <input type="checkbox"/> | Sales | Sales | 50 | 20 | Longest Available Worker | Skill-based-Queue |

Showing 1 to 2 of 2 entries

<

1

>

2. Select the skill-based Routing Queue that you wish to edit, by selecting the corresponding Call Queue check box.

Queues

Call Queues

+ Add New

Actions

Se:

Edit Queue

Delete Queue(s)

Show100entries

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|-------------------------------------|------------|-------------|-----------------|--------------------------|--------------------------|-------------------|
| <input checked="" type="checkbox"/> | Helpdesk | Helpdesk | 50 | 20 | Longest Available Worker | Skill-based-Queue |
| <input type="checkbox"/> | Sales | Sales | 50 | 20 | Longest Available Worker | Skill-based-Queue |

Showing 1 to 2 of 2 entries



<

1

>

3. From the 'Actions' drop-down menu, choose **Edit Queue**; the following appears:

Edit Call Queue

| | |
|---|--|
| Name* | <input type="text" value="My Queue"/> |
| Queue Number | <input type="text" value="+1589343"/> |
| Description | <input type="text" value="IT&Sales"/> |
| Greeting | <input type="text" value="Time Out Message"/> |
| Music on Hold | <input type="text" value="Default"/> |
| Routing Type | <input type="text" value="Skill-based Priority Routing"/> |
| Workers* | <input type="text" value="Worker 1"/>  <input type="text" value="Worker 2"/>  |
| Wrap-up Events Group | <input type="text" value="Wrap Up Event"/> |
| Maximum Calls in Queue | <input type="text" value="50"/> |
| When the maximum number of calls is reached | |
| Action 1 | <input type="text" value="Disconnect"/> |
| Maximum Wait Time (Min.) | <input type="text" value="20"/> |
| When the maximum wait time is reached | |
| Action 1 | <input type="text" value="Disconnect"/> |
| Check for logged out workers | <input type="checkbox"/> |

[Save Changes](#)

- Make your necessary changes, and then click **Save Changes**.

Deleting a Skill-Based Routing Queue

The procedure below describes how to delete a skill-based Routing Queue.

➤ To delete a Skill-Based Routing Queue:

- Open the Call Queues page (**Configuration > Routing > Queues**); the following appears:

Queues

| Call Queues | | | | | | | Add New | Actions |
|-------------------------------------|-------------|-----------------|--------------------------|--------------------------|-------------------|--|-------------------------|-------------------------|
| Show 100 entries | | | | | | | Search | |
| <input type="checkbox"/> Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type | | | |
| <input type="checkbox"/> Helpdesk | Helpdesk | 50 | 20 | Longest Available Worker | Skill-based-Queue | | | |
| <input type="checkbox"/> Sales | Sales | 50 | 20 | Longest Available Worker | Skill-based-Queue | | | |

Showing 1 to 2 of 2 entries

2. Select the Call Queue you wish to delete by selecting the corresponding check box.
3. From the 'Actions' drop-down menu, choose **Delete Queue(s)**.

Queues

Call Queues

Show 100 entries

| <input type="checkbox"/> | Queue Name | Description | Max Calls Limit | Maximum Wait Time (Min.) | Routing Type | Queue Type |
|-------------------------------------|------------|-------------|-----------------|--------------------------|--------------------------|-------------------|
| <input checked="" type="checkbox"/> | Helpdesk | Helpdesk | 50 | 20 | Longest Available Worker | Skill-based-Queue |
| <input type="checkbox"/> | Sales | Sales | 50 | 20 | Longest Available Worker | Skill-based-Queue |

Showing 1 to 2 of 2 entries

Actions: Add New, Edit Queue, Delete Queue(s)

4. A confirmation box appears.
5. Click **OK** to confirm deletion.



When deleting a queue, the system checks if the queue is already used in any related transfer to queue actions..
If the queue is in use, the delete request is denied with an appropriate message.

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 Hours Set

The procedure below describes how to add a new Working Hours Set.

➤ To add a new Working Hours Set:

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

Working Hours

Working Hours Set

Show 100 entries

Search

| | |
|--------------------------|---------|
| <input type="checkbox"/> | Default |
|--------------------------|---------|

Showing 1 to 1 of 1 entries

Actions: Add New, Actions

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

New Working Hours

Name*

| Week Day | Working Day | Start Hour | | End Hour | | |
|-----------|--------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|--|
| Sunday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 577 1227 622" type="button" value="+"/> |
| Monday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 678 1227 723" type="button" value="+"/> |
| Tuesday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 779 1227 824" type="button" value="+"/> |
| Wednesday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 880 1227 925" type="button" value="+"/> |
| Thursday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 981 1227 1025" type="button" value="+"/> |
| Friday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 1081 1227 1126" type="button" value="+"/> |
| Saturday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input data-bbox="1189 1182 1227 1227" type="button" value="+"/> |

3. In the 'Name' field, enter the name of the working hours.
4. In the 'Working Days' check box, define the working days and hours, 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 with shifts from Monday till Friday.

New Working Hours

Name*

| Week Day | Working Day | Start Hour | | End Hour | | |
|-----------|-------------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|----------------------------------|
| Sunday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| Monday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Tuesday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Wednesday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Thursday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Friday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Saturday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |

Editing Working Hours Set

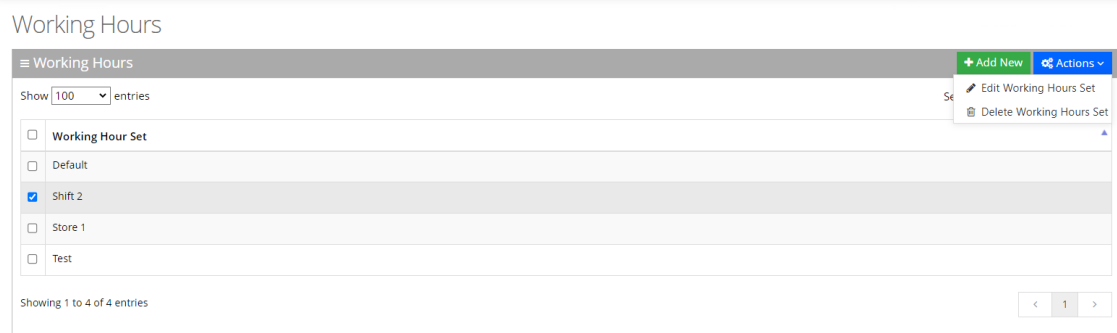
The procedure below describes how to edit a Working Hours Set.

➤ To edit a Working Hours Set:

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



2. Select the Working Hours Set that you wish to edit.
3. Click **Actions**; the following appears.



4. Select **Edit Working Hours Set**; the following appears:

New Working Hours

Name*

| Week Day | Working Day | Start Hour | | End Hour | | |
|-----------|-------------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|----------------------------------|
| Sunday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| Monday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Tuesday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Wednesday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Thursday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Friday | <input checked="" type="checkbox"/> | <input type="text" value="08"/> | <input type="text" value="00"/> | <input type="text" value="12"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |
| | | <input type="text" value="13"/> | <input type="text" value="00"/> | <input type="text" value="17"/> | <input type="text" value="00"/> | <input type="button" value="-"/> |
| Saturday | <input type="checkbox"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="button" value="+"/> |

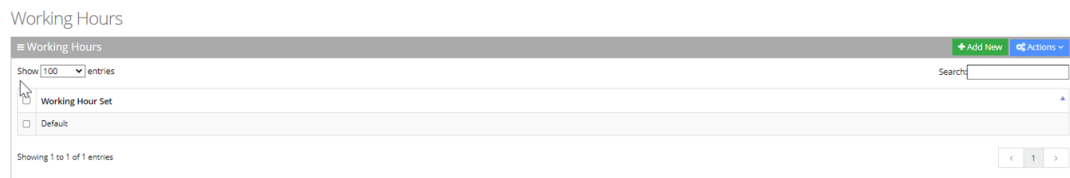
5. Edit the working days and hours, by selecting the check box of each appropriate working day.
6. Edit the 'Start Hour' and 'End Hour' for each applicable day.
7. Click **Save Changes**.

Deleting Working Hours Set

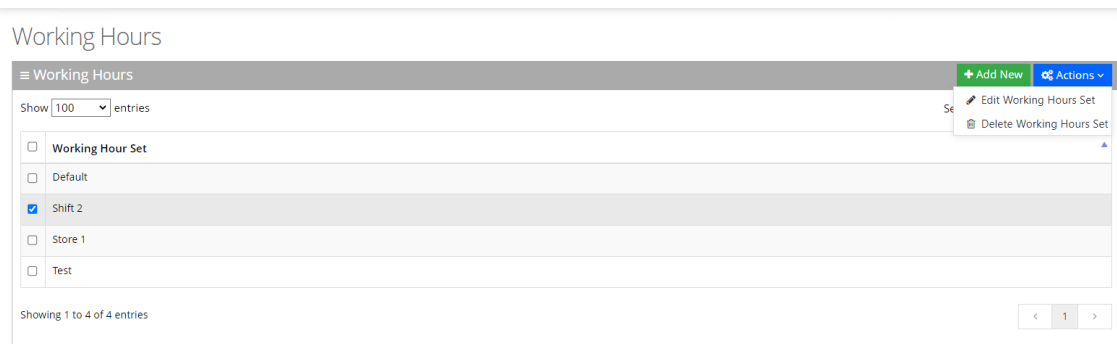
The procedure below describes how to delete a Working Hours Set.

➤ **To delete a Working Hours Set:**

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



2. Select the Working Hours Set that you wish to delete.
3. Click **Actions**; the following appears.



4. Select **Delete Working Hours Set**.
5. An "Are you sure want to delete the selected working hour set?" message appears; click **OK** to delete.

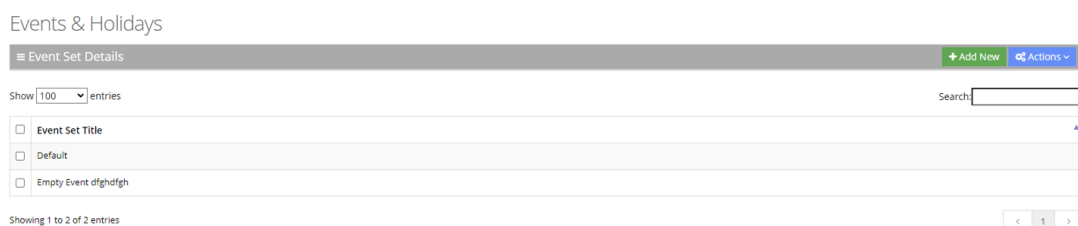
Defining Events and Holidays

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 appears:



- Click **"Add New"**; the following appears:

- In the 'Event Set Name' field, enter name of the event set.
- Add a new event by clicking .
- In the 'Description' field, enter the event description.
- In the 'Event Dates' field, enter the Start and End times for the event.
- From the 'Actions' drop-down list, select the appropriate actions.
- For more information of the possible Actions, see [Actions](#).
- Click the  delete icon to delete an event.
- Click **Save Changes** to confirm your details; A “New event successfully created” message appears.

Editing Events and Holidays

The procedure below describes how to edit Events and Holidays.

➤ To edit Events and Holidays:

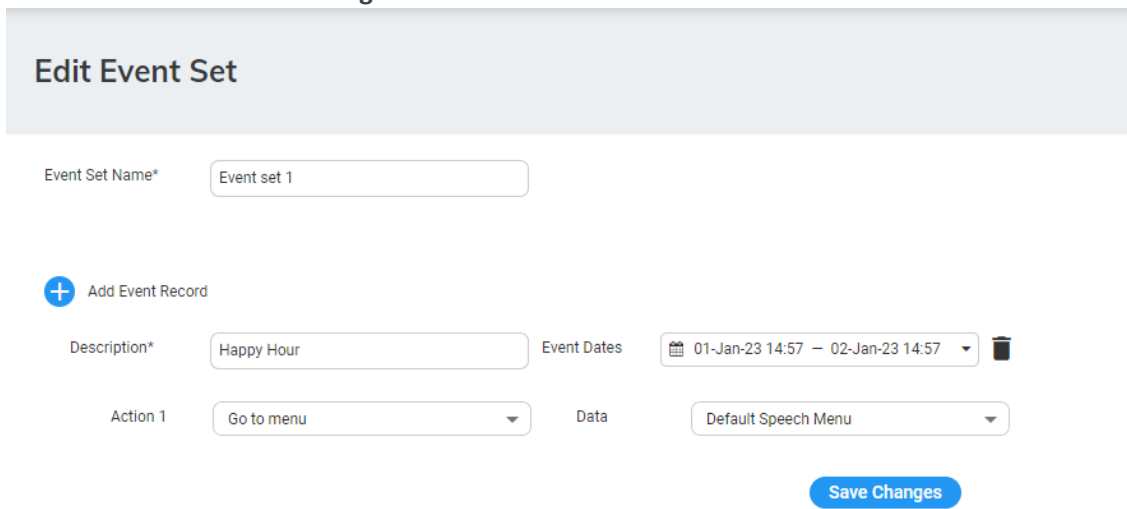
- Open the Telephony Settings screen (**Configuration > Events & Holidays**).
- Select the event or holiday that you wish to edit.
- Click **Actions**; the following appears:

Figure 6-3:



4. Select **Edit Event**.

Figure 6-4:



5. Edit the necessary information, and then click **Save Changes**; an “Event Successfully Updated” message appears.

Delete Events and Holidays

The procedure below describes how to delete Events and Holidays.

➤ To delete Events and Holidays:

1. Open the Telephony Settings screen (**Configuration > Events & Holidays**).
2. Select the event or holiday that you wish to delete.
3. Click **Actions**; the following appears:

Figure 6-5:



4. Select **Delete Event Set**; an "Are you sure want to delete the selected event set/s?" message appears.
5. Click **OK**.

System Settings

System settings consists of the following:

- Teams Presence Settings
- Directory Synchronization
- Email Settings

Teams Presence Settings

To get the presence of Azure tenant users, the application should get permissions for accessing this information.

This process requires:

- The organization Administrator (Microsoft 365) should grant tenant-wide Administrator consent to the Directory and Presence application on behalf of the organization.
- Users with global Administrator privileges or users that assign to the Directory and Presence application, created in the consent process.

➤ To obtain permissions:

1. Open the System Settings page (**Configuration > System Settings**); the following appears:

System Settings

▼ Teams Presence Settings

Azure Tenant ID*

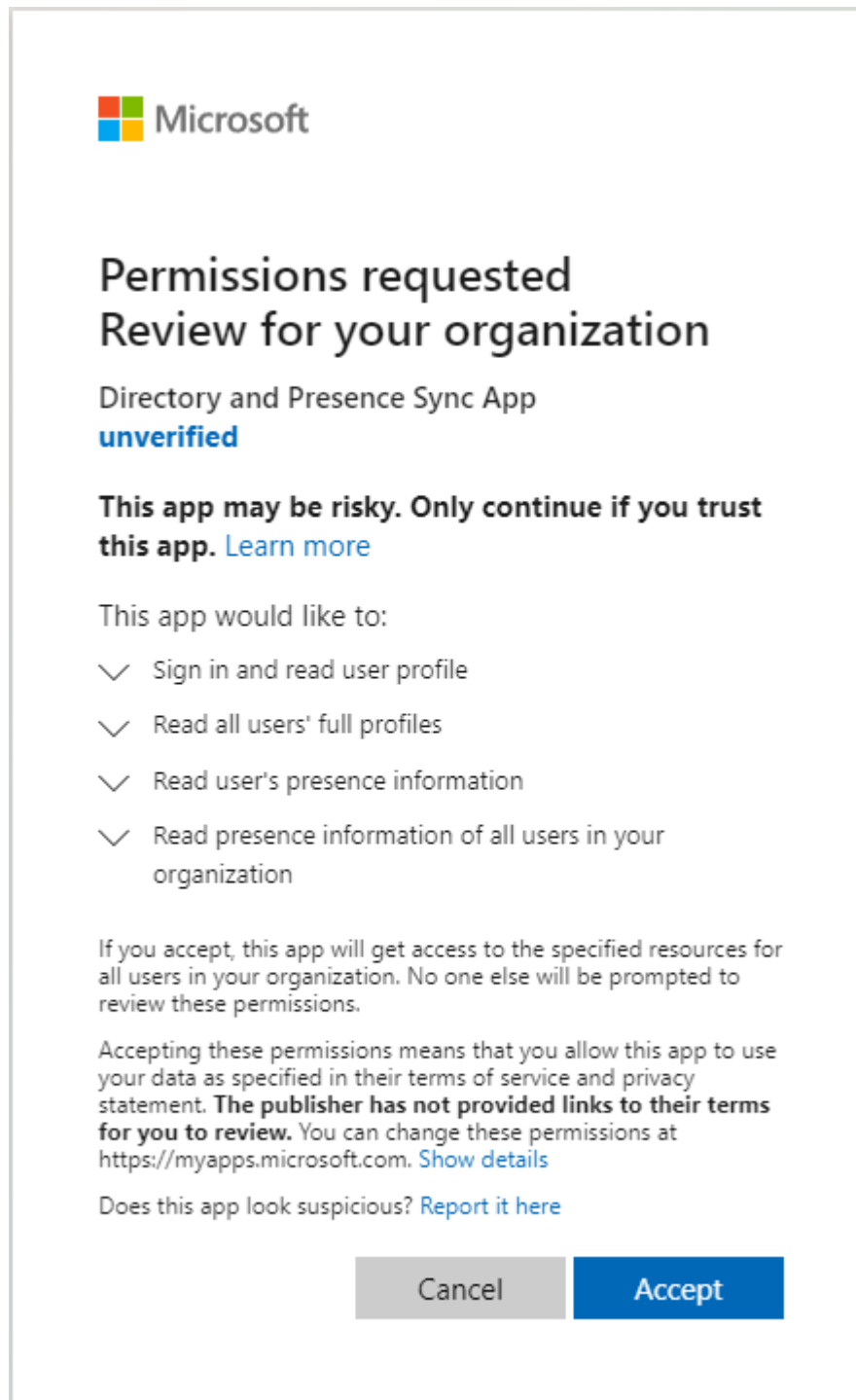
User*

Password*

Consent

Save Changes

2. In the 'Azure Tenant ID' field, enter the Azure Tenant ID.
3. In the 'User' field, enter the Microsoft global Administrator.
4. In the 'Password' field, enter the Microsoft user password.
5. Click **Save Changes** to save your changes.
6. Click **Consent**; the following appears:



7. Click **Accept**; the access permission to the Azure Active Directory (AD) and presence for Azure tenant is enabled, so Voca can access it.

Directory Synchronization

The procedures below describe how to configure Azure Active Directory (AD) and Lightweight Directory Access Protocol (LDAP) synchronization.

➤ **To configure LDAP:**

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

The screenshot shows the 'System Settings' page. It has a light blue header with the title 'System Settings'. Below the header, there are two sections. The first section is 'Teams Presence Settings', which has three input fields: 'Azure Tenant ID*', 'User*', and 'Password*'. To the right of these fields are two blue buttons: 'Concent' and 'Save Changes'. The second section is 'Directory Synchronization', which has a 'Synchronization Mode' label and a dropdown menu currently set to 'None'. Below the dropdown is a blue 'Save Changes' button.

System Settings

▼ Teams Presence Settings

Azure Tenant ID*

User*

Password*

Concent **Save Changes**

▼ Directory Synchronization

Synchronization Mode

Save Changes

2. Under the **Directory Synchronization** group, from the 'Synchronization Mode' drop-down list, select **LDAP**; the following appears:

▼ Directory Synchronization

| | |
|----------------------------------|--------------------------|
| Synchronization Mode | LDAP ▼ |
| LDAP Connection | |
| Server* | <input type="text"/> |
| Port* | 389 |
| LDAP Version* | Default ▼ |
| User | <input type="text"/> |
| Password | <input type="password"/> |
| baseDN* | <input type="text"/> |
| Filter Usage | Append to default ▼ |
| Filter | <input type="text"/> |
| Encoding | Default ▼ |
| Check Connection | |

- In the 'Server' field, enter the URL of the LDAP server. It can include either FQDN or an IP Address.
- In the 'Port' field, enter the port that synchronizes with LDAP. Enter either "398" or "3268".
- From the 'LDAP Version' drop-down list, select the LDAP Version.
- In the 'User' field, enter the Service Administrator Name.
- In the 'Password' field, enter the Service Administrator password.
- In the 'baseDN' field, define the baseDN that you want to use.
- From the 'Filter Usage' drop-down list, select the appropriate filter:
 - Append to default:** Uses the default filter that was applied on Voca. The default filter is: (&(objectCategory=person)(objectClass=user)(" + id + "=*")(|(" + firstName + "=*")(|(" + lastName + "=*)))
 - Replace Default:** Replaces the default filter with the filter that you configured in the 'Filter' field.
- In the 'Filter' field, define the filter that you want to use. For more information, click [here](#).
- From the 'Encoding' drop-down list, select the appropriate encoding to be used when importing from the LDAP filter.



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

12. Under the LDAP User Attributes group, you can enter different attributes to import for LDAP or use the default.

LDAP User Attributes

| | |
|------------|-----------------|
| UniqueID | objectGUID |
| First Name | givenName |
| Last Name | sn |
| Extension | telephoneNumber |
| Mobile | mobile |
| Department | department |
| Email | mail |

13. Select the following fields when you want to import contacts from the Azure AD server:

- Days
- Start Time

Import Schedule

| | | |
|------------------------|--|---|
| days | <input checked="" type="checkbox"/> Sunday | <input checked="" type="checkbox"/> Monday |
| | <input checked="" type="checkbox"/> Tuesday | <input checked="" type="checkbox"/> Wednesday |
| | <input checked="" type="checkbox"/> Thursday | <input type="checkbox"/> Friday |
| | <input type="checkbox"/> Saturday | |
| Start time not before* | 23 | : 0 |

14. If you select the 'Incremental Mode' check box, the LDAP sync disables all contacts NOT in the list. If the 'Incremental Mode' check box is not enabled, the LDAP sync adds the contacts to the system (without disabling the contacts that do not appear in the updated list).

Auto Attendant Address Book Sync

Incremental Mode



15. From the 'Email Notification' drop-down list, select one of the following to indicate when notification emails should be sent:

- None
- Success
- Failure
- All

Email Notification

Send on*

None

Import Now

Save Changes

16. Click **Save Changes**.

17. Click **Import Now** to import contacts from the LDAP server immediately (Optional).

➤ To configure Azure AD:

This process requires the following:

- The organization Administrator (Microsoft 365) should grant tenant-wide admin consent to Directory and Presence applications on behalf of the organization.



The consent process needs to be made once for Azure AD sync and Teams Presence.

- Users with global Administrator privileges or users that assign to the Directory and Presence application that was created in the consent process.

1. Open the System Settings page (**Configuration > System Settings**); the following appears:

System Settings

▼ Teams Presence Settings

Azure Tenant ID*

User*

Password*

Concent

Save Changes

▼ Directory Synchronization

Synchronization Mode

None

Save Changes

2. Under the **Directory Synchronization** group, from the 'Synchronization Mode' drop-down list, select **Azure AD**; the following appears:

▼ Directory Synchronization

Synchronization Mode

Azure AD

Azure Connection Details

Azure Tenant ID*

www.abc.com

User*

100

Password*

.....

Filter

1

Concent

Check Connection

3. In the 'Azure Tenant ID' field, enter the Azure Tenant ID from which to request the presence.
4. In the 'User' field, enter the name of the user defined on the Azure tenant with permissions to access the presence.
5. In the 'Password' field, enter the user's password.
6. In the 'Filter' field, enter the filter configuration. For example:

```
"(startsWith(givenName, 'V') OR endsWith(mail, '@outlook.com'))
AND businessPhones/any(p:p le 'a') AND surname ne null and NOT
(surname eq 'Last')"
"department in ('Retail', 'Sales') AND givenName le 'zzz' AND
mobilePhone ge '9'"
```

7. Click **Consent**.



Operators: 'Contains', 'lt' and 'gt' are not supported. For more information, refer to <https://docs.microsoft.com/en-us/graph/aad-advanced-queries?tabs=http>.



To check connectivity to Azure AD, click **Check Connection**.

8. Under the **Azure AD User Attributes** group, enter the following:

- a. In the 'Unique ID' field, enter "Id".
- b. In the 'First Name' field, enter "givenName".
- c. In the 'Last Name' field, enter "surname".
- d. In the 'Extension' field, enter "businessPhone".
- e. In the 'Mobile' field, enter "mobilePhone".
- f. In the 'Department' field, enter "department".
- g. In the 'Email' field, enter "mail".

Azure AD User Attributes

| | |
|------------|----------------|
| UniqueID | Id |
| First Name | givenName |
| Last Name | surname |
| Extension | businessPhones |
| Mobile | mobilePhone |
| Department | department |
| Email | mail |

9. Select the following fields for when you want to import contacts from the Azure AD server:

- Days
- Start Time

Import Schedule

days

- ☒ Sunday ☒ Monday
☒ Tuesday ☒ Wednesday
☒ Thursday ☐ Friday
☐ Saturday

Start time not before*

23 : 0

10. Under the **VocaNOM Connection** group, if you select the 'Incremental Mode' check box, the LDAP sync disables all contacts NOT in the list. If the 'Incremental Mode' check box is not enabled, the LDAP sync adds the contacts to the system (without disabling the contacts that do not appear in the updated list).

VocaNOM Connection

Incremental Mode

☐

Email Notification

Send on*

None

Import Now

Save Changes

11. From the 'Email Notification' drop-down list, select one of the following to indicate when notification emails should be sent:
- None
 - Success
 - Failure
 - All
12. Click **Save Changes**.



To check connectivity to Azure AD, click **Check Connection**.

Email Setting Configuration

The procedures below describe how to configure email settings.

To configure email settings:

1. Open the System Settings page (**Configuration > System Settings**); the following appears:

▼ Email Settings

| | |
|-----------------|--------------------------|
| Server Address* | <input type="text"/> |
| TLS | <input type="checkbox"/> |
| Port* | <input type="text"/> |
| Username | <input type="text"/> |
| Password | <input type="password"/> |
| From Address* | <input type="text"/> |

Save Changes

2. In the 'Server Address' field, enter the URL of the email server. It can include either FQDN or an IP Address.
3. Enable the 'TLS' check box, if the email server is working with TLS.
4. In the 'Port' field, enter the port that is used for the email server. Possible values are '25' for or '587'.
5. In the 'User' field, enter the username for the email address you're using.
6. In the 'Password' field, enter the password for the email address you're using.
7. In the 'From Address' field, enter the address the email will be sent from.
8. Click **Save Changes**.

Access Management

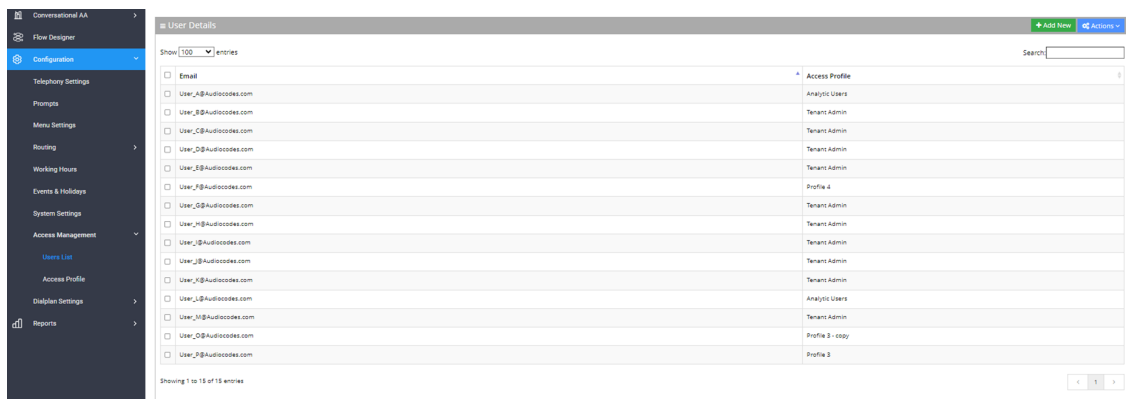
Access Management allows you to add or edit users to view different pages in the Tenant configuration, so that you can share responsibilities more effectively.

Configuring Access Management

The procedure below describes how to assign different Tenant privileges to different users.

➤ To create or edit a user:

1. Open the User List page (**Configuration > Access Management > Users List**); the following appears:



The User Lists page is described below:

- **Email:** Defines the user's email.
 - **Access Profile:** Defines the profile that is assigned to the user. Every profile can have different capabilities of viewing or editing pages in the Tenant Voca CIC management.
1. Click **+Add New** to add a new user, or select a user and from the 'Actions' drop-down menu, choose **Edit User**; the following appears:

New User

General Settings

| | |
|-----------------|--|
| Email* | <input type="text"/> |
| Contact Name* | <input type="text"/> |
| Contact Phone | <input type="text"/> |
| Company Name | <input type="text"/> |
| Country* | <input type="text" value=""/> |
| SSO | <input type="checkbox"/> |
| Password* | <input type="password"/> <input type="button" value="Generate"/> |
| Access Profile* | <input type="text" value="None"/> |

The User Configuration is described below:

- **Email:** Defines the email address.
- **Contact Name:** Defines the Contact Name.
- **Contact Phone:** Defines the Contact Phone.
- **Company Name:** Defines the Company Name.

- **Country:** Defines the Country.
- **SSO:** The Tenant Administrator may define an SSO user with Azure AD (as configured in the system setting > AD sync).
- **Password:** Defines the password.
- **Access Profile:** Assigns a profile from the profiles list, defined on the Profile page.
 - A mandatory field for non-SSO users.



If Tenant Administrators do not directly select an Access Profile for a SSO user, they must ensure that:

- The SSO user belongs to exactly one Azure Security Group
- The Azure Security Group is assigned to a profile on the Profile Page.

➤ **To create or edit a profile:**

1. Open the Access Profile page (**Configuration > Access Management > Access Profile**); the following appears:

Access Profile

| Profile Name | Description | Security Group Names | # of Assigned Users |
|------------------|------------------------|----------------------|---------------------|
| Profile 3 | | Test1 | 1 |
| Profile 3 - copy | | | 1 |
| Profile 4 | | TestTest2 | 1 |
| Tenant Admin | Default System Profile | | 10 |
| Analytics Users | Default System Profile | | 2 |

Showing 1 to 5 of 5 entries

The Access Profile page is described below:

- **Profile Name:** Defines the Profile's name.
 - **Description:** Defines the Profile's description.
 - **Security Group Names:** Defines the Azure Directory Security Groups that their Voca SSO users are assigned to this profile.
 - **# Of Assigned Users:** Defines the number of local users (non-SSO users) that are assigned manually to this profile.
2. Click **+Add New** to add a new profile, or select an Access Profile and from the 'Actions' drop-down menu, choose **Edit Profile**; the following appears:

Add Access Profile

Profile Name*

Description

AD Security Groups

| Access Areas | View | Edit |
|---------------------|--------------------------|--------------------------|
| Dashboard | <input type="checkbox"/> | <input type="checkbox"/> |
| > Conversational AA | <input type="checkbox"/> | <input type="checkbox"/> |
| Flow Designer | <input type="checkbox"/> | <input type="checkbox"/> |
| > Configuration | <input type="checkbox"/> | <input type="checkbox"/> |
| > Reports | <input type="checkbox"/> | <input type="checkbox"/> |

[Save Changes](#)

The Access Profile Configuration is described below:

- **Profile Name:** Defines the Profile name.
- **Description:** Defines the description.
- **AD Security Groups:** Entering Azure Directory Security group name/s in this field, automatically assigns all SSO users in this Security Group to this profile, during the logging process (unless their profiles were selected manually on the User Configuration Page).



Press **Enter** in the text field for each AD Security Group input, to save the entry.

- **Access Areas:** Tenant administrators can selectively check specific sections/pages to allow users with this Profile viewing and/or editing those sections/pages.

System Profiles

The Access Profile list comes with two built-in non-editable profiles. The assignment to these profiles is similar to the assignment of manually configured profiles

- **Tenant Admin:** Defines privileges for all Voca configuration sections (including Access Profile section).
- **Analytics User:** Defines Users with privileges to see only the Reports section.

Dialplan Settings

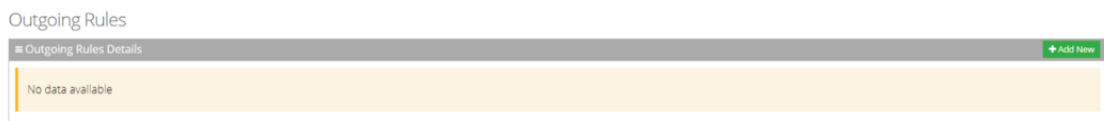
This section gives the Administrator the option to configure and manage inbound and outbound basic routing manipulations on Voca, sent out to the customer's SBC/IP PBX.

Configuring 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 > Dialplan Settings > Outgoing Rules**); the following appears:



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

- In the 'Trim' field, enter the number of digits to be removed from the prefix of the Destination number.
- In the 'Prepend' field, enter the number to be added to the Destination number.

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

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 Incoming Rules

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

➤ **To configure a new incoming rule:**

1. Open the System Settings page (**Configuration > Dialplan Settings > Incoming Rules**); the following appears:

System Settings

≡ System Settings - Step 1 of 2

1 System Settings 2 Confirm

System Settings

CLI under is considered an Employee.

Continue ➞

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.
3. Click **Continue**.

System Settings

≡ System Settings - Step 2 of 2

1 ✓ System Settings 2 Confirm

Confirm Information

CLI under 6 is considered an Employee.

⏪ Back Save Information ➞

4. Click **Save Information**.

7 Generating Reports

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

- Call Queue Reports
- Interaction Center Reports
- IVR Reports

Call Queue Reports

You can generate the following Call Queue historical reports and Real-time dashboard view:

- Report Scheduler
- Journey Manager
- Overall
- Drilldown
- Real-time Dashboard

Report Scheduler

The Report Scheduler provides an easy way to automate the generation of reports on a regular and recurring basis by setting up a schedule. Scheduled reports can run at predetermined times and automatically sent to email recipients as attachments.



The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click [here](#).

Adding a Report Scheduler

The procedure below describes how to add a new Report Scheduler.

➤ To add a new Report Scheduler:

1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

Search

⋮

Action

+ New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|--------------------------|---------------|------------|------------------|---------------|--------|
| | | | | | |

Items per page: 10 ▾

0 of 0

|<
<
>
>|

2. The following is a description of all the fields:

| Field | Description |
|------------------|---|
| Schedule Name | Defines the report scheduler name that was configured. |
| Start Date | Defines the start dates that were configured on the report scheduler. |
| Select Frequency | Defines the frequency that this report is sent. |
| Export Format | Defines the format in which this report is sent. |
| Status | Defines the status of the schedule report. |

3. Click **+ New Scheduled**; the following appears:

NEW SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Report export method

▼

Start date & time

mm/dd/yyyy --:-- --

End date & time

mm/dd/yyyy --:-- --

Export Frequency

At

Daily

▼

Time

--:-- --

⊙

Export Format

▼

Report Details

Reports

▼

Cancel

Schedule

4. The following is a description of the fields that must be entered:

| Field | Description |
|----------------------|--|
| Schedule Name | Defines the name of the scheduled report. |
| Report Export Method | Defines the method that this report is sent. |

| Field | Description |
|-------------------|--|
| Start Date & Time | Defines the first time that this report is run. The Start Date & Time uses the time zone that is configured at the tenant level. |
| End Date & Time | Defines the last time that this report will be run. The End Date & Time uses the time zone that is configured at the tenant level. |
| Export Frequency | Defines the recurrence pattern for the scheduled report. |
| Time | Defines the time that this report will be generated. |
| Day | Defines the day that this report will be generated. This option is only available when the frequency is set to Weekly . |
| Range | Defines a specific time range within the month, or choose a custom day range within the month that the report will be generated. This option is only available when the frequency is set to Monthly . |
| Export Format | Defines the format that this report is sent in. |
| Email Subject | Defines the subject name of email that is sent. |
| Recipients | Defines the recipients who will be receiving the email. More than one recipient can be added. |
| Reports | Select the report to be scheduled. |

5. The following is a description of the filter that can be applied for this report:

| Field | Description |
|------------|-------------------------------------|
| Queue Name | Filter by a specific queue. If that |

| Field | Description |
|------------------|--|
| | queue is not selected, it will be considered as any queue. |
| Call Source | Filter by a specific call source. |
| Call Destination | Filter by a specific call destination. |
| Wait Time (sec.) | Filter by Wait Time in seconds. |

- Click **Save Changes**.

Editing a Report Scheduler

The procedure below describes how to edit a Report Scheduler.

➤ To edit a Report Scheduler:

- Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

Action + New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|--------------------------|----------------|--------------------------|------------------|---------------|-------------------------------------|
| <input type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1

- Select the report schedule that you wish to edit by selecting the corresponding **Report Schedule** check box.

Report Scheduler

Action + New Scheduled

| <input checked="" type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT | STATUS |
|-------------------------------------|----------------|--------------------------|------------------|--------|-------------------------------------|
| <input checked="" type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1

- From the 'Actions' drop-down menu, choose **Edit**; the following appears:

EDIT SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name
Daily Schedule

Report export method
Email

Start date & time
05/28/2023 01:41 PM

End date & time
05/31/2023 01:42 PM

Export Frequency
At
Daily

Time
01:41 PM

Export Format
XLSX

Email Subject
Overall - Daily

Recipients
admin@voca.audiocodes.com

Report Details

Reports
Overall

Queue Name

Call Source
Exact

Call Destination
Exact

Wait Time (Sec.)
From
To

Status
Any

Timezone Display Mode
Tenant Time zone

Cancel Schedule

4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Delete a Report Scheduler

The procedure below describes how to delete a Report Scheduler.

➤ To delete a Report Scheduler:

1. Open the Report Scheduler screen (**Reports > Call Queue Reports > Report Scheduler**); the following appears:

Report Scheduler

Search

Action + New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|--------------------------|----------------|--------------------------|------------------|---------------|-------------------------------------|
| <input type="checkbox"/> | Daily Schedule | May 28, 2023, 1:41:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 |< < > >|

2. Select the report schedule that you wish to delete by selecting the corresponding **Report Schedule** check box.

Report Scheduler

Search

Action + New Scheduled

| <input checked="" type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|-------------------------------------|----------------|--------------------------|------------------|---------------|-------------------------------------|
| <input checked="" type="checkbox"/> | Daily Schedule | May 28, 2023, 1:41:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 |< < > >|

- From the 'Actions' drop-down menu, choose **Delete**.

Journey Manager Report

The Journey Manager Report displays a summary of calls with a full detailed flow, from the moment the call enters, to the IVR flow, providing all flow interactions.

➤ To generate the Journey Manager report:

- Open the Journey Manager Report page (**Reports > Call Queues Reports > Journey Manager**); the following appears.

Interaction Center Reports

≡ Journey Manager

▼ Filter Options

| | | | | |
|-----------------------|----------------------|----------------------|----------------------|----------------------|
| Date From | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Date To | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Call Source | <input type="text"/> | Exact | ▼ | |
| DNIS | Any ▼ | | | |
| Queue Name | Any ▼ | | | |
| Call Disposition | Any ▼ | | | |
| Timezone Display Mode | Tenant Time zone ▼ | | | |

✓ Generate ▼ Reset Filter

- Select the appropriate filter fields to generate your report:
 - Date From:** Displays this report for a specific date/time range.
 - Date To:** Displays this report for a specific date/time range.
 - Call Source:** Displays information that is related to a specific source number.
 - DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
 - Queue Name:** Defines a specific queue name or 'Any' to show statistics for all call queues.

- **Call Disposition:** Defines information that relate to calls that end with a specific disposition or “Any”. For an explanation of the different call disposition, refer to [Call Dispositions](#) on page 171.
 - **Timezone Display Mode:** Displays this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Displays the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Displays the information in this report based on the time zone configured under the **Telephony Setting** settings.
 - ◆ **Local time zone (Web):** Displays the information in this report based on the browser local time zone.
3. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.
 4. The following is a description of the report fields.

| Field | Description |
|-------------|--|
| Date | Defines the date of the call. |
| Timezone | Defines the time zone of the call. |
| Source | Defines the phone number the call was made from. |
| Destination | Defines the telephone number that was dialed by the caller. |
| Duration | Defines the time between when the call is inserted into the queue until the call was transferred, abandoned, or reached the over-flow limit. |
| DNIS Name | Defines the name of the IVR service. |
| Queue Name | Defines the Queue name that got the call. |
| Queue Time | Defines the total time that the customer waited in the queue. |
| Talk Time | Defines how long the worker was in the talking state. |
| Disposition | Displays the disposition of the call. |
| Routed To | Defines the number where the call has been routed to. |

Call Queue Reports

| Journey Manager | | | | | | | | | | | |
|---------------------|-----------|---------|--------------|----------|------------|------------|------------|-----------|------------------------|-----------|--|
| Filter Options | | | | | | | | | | | |
| Show 25 entries | | | | | | | | | | Search | |
| Date | Timezone | Source | Destination | Duration | DNIS Name | Queue Name | Queue Time | Talk Time | Disposition | Routed To | |
| 2023-12-27 10:49:43 | UTC +2:00 | +97254 | | 00:00:55 | regression | Queue 1 | 00:00:53 | 00:00:00 | Call abandoned | | |
| 2023-12-11 15:08:26 | UTC +2:00 | +97254 | | 00:00:38 | regression | Queue 2 | 00:00:36 | 00:00:00 | Call abandoned | | |
| 2023-12-11 15:03:36 | UTC +2:00 | +97254 | | 00:00:04 | regression | Queue 1 | 00:00:02 | 00:00:00 | Call abandoned | | |
| 2023-12-10 15:54:02 | UTC +2:00 | +97254 | | 00:00:15 | regression | Queue 3 | 00:00:13 | 00:00:00 | Call abandoned | | |
| 2023-12-10 15:53:03 | UTC +2:00 | +97254 | | 00:00:09 | regression | Queue 2 | 00:00:06 | 00:00:00 | Call abandoned | | |
| 2023-12-10 15:48:21 | UTC +2:00 | +97254 | | 00:00:25 | regression | Queue 1 | 00:00:17 | 00:00:00 | Call abandoned | | |
| 2023-11-27 14:22:24 | UTC +2:00 | +972549 | | 00:00:19 | regression | Queue 1 | 00:00:02 | 00:00:00 | Transfer | +97239 | |
| 2023-11-22 13:55:51 | UTC +2:00 | +97254 | +97239764820 | 00:01:09 | regression | Queue 1 | 00:00:54 | 00:00:00 | Transferred from Queue | +97239 | |
| 2023-11-22 13:31:00 | UTC +2:00 | +97254 | | 00:00:27 | regression | Queue 2 | 00:00:06 | 00:00:00 | Call abandoned | | |
| 2023-09-05 14:53:49 | UTC +2:00 | +97254 | | 00:00:10 | regression | Queue 3 | 00:00:03 | 00:00:00 | Max Wait Time Exceeded | | |

5. Click on any call to view its flow, separated by relevant sections.

| | | | | | | | | | | |
|-----------------------------------|---------------------|------------------------|--------------------------------|---------|----------|-----|-------------|----------|----------|------------|
| <div><div></div></div> | 2023-12-27 11:36:27 | UTC +2:00 | +972526403466 | 555111 | 00:03:19 | N/A | Skill Based | 00:00:00 | 00:00:00 | Disconnect |
| Interaction Manager (Voice) | | | | | | | | | | |
| Time | Action | Description | Content | Result | | | | | | |
| 11:36:10 | Go to Menu | Default Speech Menu | - | - | | | | | | |
| Speech Menu (Default Speech Menu) | | | | | | | | | | |
| Queue (Skill Based) | | | | | | | | | | |
| Time | Action | Description | Content | Result | | | | | | |
| 11:36:27 | Overflow | All agents are offline | - | - | | | | | | |
| 11:36:27 | Play Prompt | Busy | - | - | | | | | | |
| 11:36:32 | Send SMS | - | - | Succeed | | | | | | |
| 11:36:32 | Transfer to Queue | Journey 2 | Priority: | - | | | | | | |
| Queue (Journey 2) | | | | | | | | | | |
| Time | Action | Description | Content | Result | | | | | | |
| 11:36:33 | Queue Info | Call Position: 1 | Number of Available Workers: 0 | - | | | | | | |
| 11:39:28 | Call Disposition | Call abandoned | - | - | | | | | | |
| 11:39:28 | Disconnect | - | - | - | | | | | | |

Overall Report

The Overall Report displays a summary of calls that were transferred, abandoned and overflowed from each queue.

➤ **To generate an Overall report:**

1. Open the Overall Report page (**Reports > Call Queues Reports > Overall**); the following appears.

Call Queue Reports

Call Queue Overall

Filter Options

| | | |
|-----------------------|------------------|-------|
| Queue Name | Any | |
| Date From | | |
| Date To | | |
| Call Source | | Exact |
| Call Destination | | Exact |
| Wait Time (Sec.) | | to |
| Status | Any | |
| Timezone Display Mode | Tenant Time zone | |

Generate

Export CSV

Reset Filter

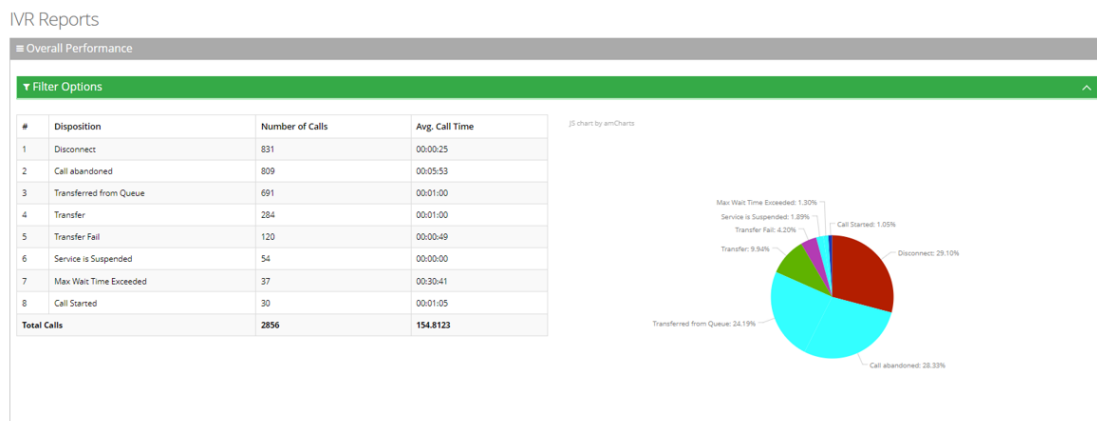
2. Select the appropriate filter fields to generate your report:

- **Date From:** Display this report for a specific date/time range.
- **Date To:** Display this report for a specific date/time range.
- **Call Source:** Display information that is related to a specific source number.
- **Call Routed:** Display information that is related to call that was routed to a specific destination.
- **Call Duration:** Display information that is related to a specific duration of a call.
- **Call Disposition:** Display information that related to calls that ended with a specific disposition or “Any”. For an explanation of the different call disposition, refer to [Call Dispositions](#).
- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Timezone Display Mode:** Display this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Display the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Display the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Display the information in this report on the browser local time zone.

3. The following is a description of the report fields.

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

- Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.



Call Date Report

The Call Date Report displays a summary of a call's performance on given dates.

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

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

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"/> | Begins wit <input type="text"/> |
| Call Routed | <input type="text"/> | Begins wit <input type="text"/> |
| Call Duration | <input type="text"/> | to <input type="text"/> |
| Call Disposition | Any <input type="text"/> | |
| DNIS | Any <input type="text"/> | |
| Timezone Display Mode | Tenant Time zone <input type="text"/> | |

Generate Export CSV Reset Filter

- Select the appropriate filter fields:

- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Call Source:** Defines information that is related to a specific source number.
- **Call Routed:** Defines information that is related to a call that was routed to a specific destination.
- **Call Duration:** Defines information that is related to a specific duration of a call.
- **Call Disposition:** Defines information that related to calls that ended with a specific disposition or “Any”. For an explanation of the different call disposition, refer to [Call Dispositions](#).
- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Timezone Display Mode:** Defines this report in different time zone. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

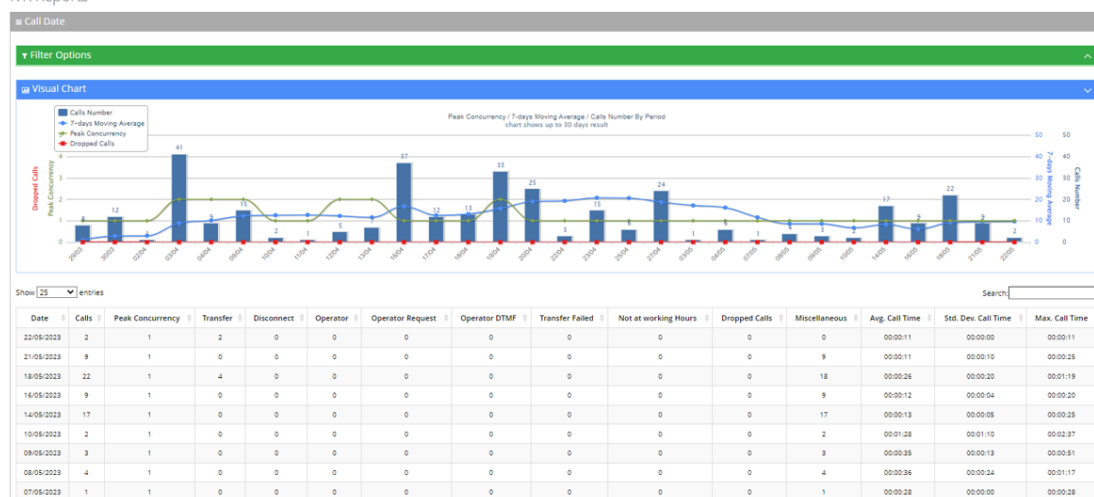
3. The following is a description of the report fields:

| Field | Description |
|------------------|---|
| Date | Defines the date. |
| Calls | Defines the number of calls. |
| Peak Concurrency | Defines the maximum number of concurrent calls the system holds for a specific period of time. |
| Transfer | Defines the number of transferred calls. |
| Disconnect | Defines the number of disconnected calls. |
| Operator | Defines the number of calls moved to the operator for some reason (not Operator Requested or Operator DTMF). |
| Operator Request | Defines the number of calls moved to the Operator because the user was asked by voice to move the call to the Operator. |
| Operator DTMF | Defines the number of calls moved to the Operator because the user pressed the DTMF to move the call to the Operator. |

| Field | Description |
|-------------------------|---|
| Transfer Fail | Defines the number of calls that failed to be transferred. |
| Not at Working Hours | Defines the number of calls that entered the system, outside of the working hours. |
| Dropped Calls | Defines 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 | Defines the number of calls that do not come under other dispositions in this report. |
| Average Call Time (sec) | Defines the average call time in seconds. |
| STD Dev Call Time (sec) | Defines the standard deviation in call time in seconds. |
| Max Call Time (sec) | Defines the maximum call time in seconds. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

IVR Reports



Drilldown Report

The procedure below describes how to generate an Overall report.

➤ **To generate a Drilldown report:**

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

Call Queue Reports

≡ Call Queue Drilldown

▼ Filter Options

| | | | |
|-----------------------|----------------------|-------|----------------------|
| Queue Name | Any | | ▼ |
| Date From | <input type="text"/> | | <input type="text"/> |
| Date To | <input type="text"/> | | <input type="text"/> |
| Call Source | <input type="text"/> | Exact | ▼ |
| Call Destination | <input type="text"/> | Exact | ▼ |
| Wait Time (Sec.) | <input type="text"/> | to | <input type="text"/> |
| Status | Any | | |
| Timezone Display Mode | Tenant Time zone | | |

2. Select the appropriate filter fields:
 - **Queue Name:** Select a specific queue name or 'Any' to show statistics for all call queues.
 - **Date From:** Defines the From Date from which the calls were made.
 - **Date To:** Defines the To Date that calls were made till.
 - **Call Source:** Defines the source that calls were made from.
 - **Call Destination:** Defines the destination that calls were routed to from the queue.
 - **Wait Time:** Defines the call waiting time in the queue.
 - **Status:** Defines the disposition of the call when leaving the queue. For an explanation of the different statuses, see [Call Dispositions](#).
 - **Timezone Display Mode:** Define this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant Time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow Time zone:** Defines the information in this report based on the time zone configured under the Telephony settings.
 - ◆ **Local Time zone (Web):** Defines the information in this report based on the browser local time zone.
3. The following is a description of the report fields:

| Field | Description |
|-------------|---|
| Queue Name | Defines the Queue name that got the call. |
| Source | Defines the originator's telephone number (ANI – Automatic Number identification). |
| Destination | Defines the telephone number that was dialed by the caller. |
| Start Time | Defines the date and time that the call was started. |
| End Time | Defines the date and time that the call was transferred, abandoned, or reached the overflow limit. |
| Timezone | Defines the time zone of the call. |
| Duration | Defines the time between when the call is inserted into the queue until the call was transferred, abandoned, or reached the overflow limit. |
| Status | Defines if the call was transferred, abandoned, or reached the overflow limit. |

Call Queue Reports

Call Queue Drilldown

Filter Summary

Filter Options

Show 25 entries

Search

| # | Queue Name | Source | Destination | Start Time | End Time | Timezone | Duration | Status |
|---|------------|---------------|--------------|---------------------|---------------------|-----------|----------|------------------------|
| 1 | HR | +972547988732 | +97233768850 | 2023-05-04 21:12:57 | 2023-05-04 21:13:05 | UTC +3:00 | 8 | Transferred from Queue |
| 2 | HR | +972547988732 | +97233768850 | 2023-05-04 21:12:34 | 2023-05-04 21:12:44 | UTC +3:00 | 10 | Transferred from Queue |
| 3 | HR | +972547988732 | +97233768850 | 2023-05-04 21:07:35 | 2023-05-04 21:08:02 | UTC +3:00 | 27 | Transferred from Queue |

Showing 1 to 3 of 3 entries

Real-Time Dashboard

The Real-Time Dashboard provides an easy way to monitor the queue activity and to get real-time insights on queues.

Adding a New Dashboard

The procedure below describes how to add a new dashboard.

➤ To add a new dashboard:

1. Open the Dashboards page (**Reports > Call Queue Reports > Real-time Dashboard**); the following appears:

Report Scheduler

Search

Action + New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|------------------------------------|---------------|------------|------------------|---------------|--------|
| Items per page: 10 0 of 0 < < > > | | | | | |

The following is a description of the fields to be entered:

| Field | Description |
|---------------|---|
| Name | Defines the name of the dashboard. |
| Description | Defines the dashboard description. |
| Dashboard URL | Opens the dashboard in a new window with a permanent link |

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

New Dashboard

Name*

Description

Queue Name*

Pending Calls 0 1

Calls Abandoned 0 1

Overflowed Calls (Max Time) 0 1

Overflowed Calls (Max Limit) 0 1

Queue Members 0 1

Longest Waiting Time Hrs. 0 Mins. 0 Secs. 0 Hrs. 1 Mins. 1 Secs. 1

Average Waiting Time Hrs. 0 Mins. 0 Secs. 0 Hrs. 1 Mins. 1 Secs. 1

3. The following is a description of the fields to be entered:

| Field | Description |
|---------------|--|
| Name | Defines the name of the dashboard. |
| Description | Defines the dashboard description. |
| Queue Name | Defines the queue to be monitored from the drop-down list. |
| Pending Calls | Sets the minimum and maximum threshold for calls waiting in the queue. |

| Field | Description |
|------------------------------|---|
| Calls Abandoned | Sets the minimum and maximum threshold for abandoned calls. |
| Overflowed Calls (Max Time) | Sets the minimum and maximum threshold for calls that exceeded the Time Limit in the queue level. |
| Overflowed Calls (Max Limit) | Sets the minimum and maximum threshold for calls that exceeded the Call Limit in the queue level. |
| Longest Waiting Time | Sets the minimum and maximum threshold for the longest call waiting in the queue (in seconds). |
| Queue Members | Sets the minimum and maximum threshold for the longest call waiting in the queue. |
| Longest Waiting Time | Sets the minimum and maximum threshold for the longest waiting time. |
| Average Waiting Time | Sets the minimum and maximum threshold for the average waiting time. |

Additional queues can be added to the dashboard by pressing the (+) button.



- The graphic view is generated automatically when up to two queues are configured. If more than two queues are configured, the dashboard displays a table view. The dashboard's data is reset every 24 hours at 00:00.

Editing a Dashboard

The procedure below describes how to edit a dashboard.

➤ To edit a dashboard:

1. Open the Dashboards screen (**Reports > Interaction Center Reports > Real-time Dashboard**); the following appears:

| Dashboards | | |
|--------------------------|--------|---|
| | | + Add New Actions |
| Show 100 entries | | Search: |
| <input type="checkbox"/> | Name | Description |
| <input type="checkbox"/> | Dash 1 | The first dashboard |
| <input type="checkbox"/> | Dash 2 | The second dashboard |

Showing 1 to 2 of 2 entries

2. Select the dashboard you wish to edit by selecting the corresponding **Dashboards** check box.

Dashboards

| Dashboards | | | + Add New | ⚙ Actions |
|--|---------------------|---------------------------------|---|-----------|
| Show 100 entries | | | Edit Dashboard Delete Dashboard(s) | |
| <input type="checkbox"/> Name | Description | Dashboard URL | | |
| <input checked="" type="checkbox"/> Dash 1 | The first dashboard | Go To Dashboard | | |
| Showing 1 to 1 of 1 entries | | | < 1 > | |

- From the 'Actions' drop-down menu, choose **Edit Dashboard**; the following appears:

Edit Dashboard

Name*

Description

Queue Name*

Pending Calls

Calls Abandoned

Overflowed Calls (Max Time)

Overflowed Calls (Max Limit)

Queue Members

Longest Waiting Time Hrs. Mins. Secs. Hrs. Mins. Secs.

Average Waiting Time Hrs. Mins. Secs. Hrs. Mins. Secs.

[+](#)

[Save Changes](#)

- Make your changes on the 'Edit Dashboard' page, and then click **Save Changes**; the updated Dashboard details appear.

Deleting a Dashboard

The procedure below describes how to delete a dashboard.

➤ To delete a dashboard:

- Open the Dashboards page (**Reports > Interaction Center Reports > Real-time Dashboard**); the following appears:

| Dashboards | | | + Add New | ⚙ Actions |
|---------------------------------|----------------------|---------------------------------|------------------------------|-----------|
| Show 100 entries | | | Search: <input type="text"/> | |
| <input type="checkbox"/> Name | Description | Dashboard URL | | |
| <input type="checkbox"/> Dash 1 | The first dashboard | Go To Dashboard | | |
| <input type="checkbox"/> Dash 2 | The second dashboard | Go To Dashboard | | |
| Showing 1 to 2 of 2 entries | | | < 1 > | |

- Select the dashboard you wish to delete by selecting the corresponding **Dashboards** check box.

| Dashboards | | | + Add New | Actions ▾ |
|-------------------------------------|--------|----------------------|------------------------------|-----------|
| Show | 100 | entries | Search: <input type="text"/> | |
| <input type="checkbox"/> | Name | Description | Dashboard URL | |
| <input type="checkbox"/> | Dash 1 | The first dashboard | Go To Dashboard | |
| <input checked="" type="checkbox"/> | Dash 2 | The second dashboard | Go To Dashboard | |
| Showing 1 to 2 of 2 entries | | | < 1 > | |

- From the 'Actions' drop-down menu, choose **Delete Dashboard(s)**.

| Dashboards | | | + Add New | Actions ▾ |
|-------------------------------------|--------|----------------------|------------------------------|-----------|
| Show | 100 | entries | Search: <input type="text"/> | |
| <input type="checkbox"/> | Name | Description | Dashboard URL | |
| <input type="checkbox"/> | Dash 1 | The first dashboard | Go To Dashboard | |
| <input checked="" type="checkbox"/> | Dash 2 | The second dashboard | Go To Dashboard | |
| Showing 1 to 2 of 2 entries | | | < 1 > | |

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

Interaction Center Reports

You can generate the following Interaction Center historical reports and real-time dashboard view:

- Report Scheduler
- Journey Manager
- Worker Activity Report
- Queue Activity Report
- Abandoned Call Detail Activity Report
- Worker Call Report
- Worker State Report
- Real-time Dashboard

Report Scheduler

The Report Scheduler provides an easy way to automate the generation of reports on a regular and recurring basis by setting up a schedule. Scheduled reports can run at predetermined times and automatically sent to email recipients as attachments.



The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click [here](#).

Adding a Report Scheduler

The procedure below describes how to add a new Report Scheduler.

➤ To add a new Report Scheduler:

1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

Search ⋮ Action + New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|------------------------------------|---------------|------------|------------------|---------------|--------|
| Items per page: 10 0 of 0 < < > > | | | | | |

2. The following is a description of all the fields:

| Field | Description |
|------------------|---|
| Schedule Name | Defines the report scheduler name that was configured. |
| Start Date | Defines the start dates that were configured on the report scheduler. |
| Select Frequency | Defines the frequency that this report is sent. |
| Export Format | Defines the format in which this report is sent. |
| Status | Defines the status of the schedule report. |

3. Click **+ New Scheduled**; the following appears:

NEW SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name

Report export method

Start date & time

End date & time

Export Frequency

At

Daily

Time

--:-- --

Export Format

Email Subject

Recipients

Report Details

Reports

Cancel

Schedule

4. The following is a description of the fields that must be entered:

| Field | Description |
|----------------------|--|
| Schedule Name | Defines the name of the scheduled report. |
| Report Export Method | Defines the method that this report is sent. |
| Start Date & Time | Defines the first time that this report is run. The Start Date & Time uses the time zone that is configured at the tenant level. |
| End Date & Time | Defines the last time that this report will be run. The End Date & Time uses the time zone that is configured at the tenant level. |
| Export Frequency | Defines the recurrence pattern for the scheduled report. |
| Time | Defines the time that this report will be generated. |

| Field | Description |
|---------------|--|
| Day | Defines the day that this report will be generated. This option is only available when the frequency is set to Weekly . |
| Range | Defines a specific time range within the month, or choose a custom day range within the month that the report will be generated. This option is only available when the frequency is set to Monthly . |
| Export Format | Defines the format that this report is sent in. |
| Email Subject | Defines the subject name of email that is sent. |
| Recipients | Defines the recipients who will be receiving the email. More than one recipient can be added. |
| Reports | Select the report to be scheduled. |

5. The following is a description of the filter that can be applied for this report:

| Field | Description |
|------------------|--|
| Queue Name | Filter by a specific queue. If that queue is not selected, it will be considered as any queue. |
| Call Source | Filter by a specific call source. |
| Call Destination | Filter by a specific call destination. |
| Wait Time (sec.) | Filter by Wait Time in seconds. |

6. Click **Save Changes**.

Editing a Report Scheduler

The procedure below describes how to edit a Report Scheduler.

➤ **To edit a Report Scheduler:**

1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

| Search | | Action | | + New Scheduled | |
|--------------------------|----------------|--------------------------|------------------|-----------------|-------------------------------------|
| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
| <input type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 < > >>

2. Select the report schedule that you wish to edit by selecting the corresponding **Report Schedule** check box.

Report Scheduler

| Search | | Action | | + New Scheduled | |
|-------------------------------------|----------------|--------------------------|------------------|-----------------|-------------------------------------|
| <input checked="" type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT | STATUS |
| <input checked="" type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 < > >>

3. From the 'Actions' drop-down menu, choose **Edit**; the following appears:

EDIT SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name

Daily Schedule

Report export method

Email

Start date & time

05/28/2023 01:41 PM

End date & time

05/31/2023 01:42 PM

Export Frequency

At

Daily

Time

01:41 PM

Export Format

XLSX

Email Subject

Overall - Daily

Recipients

admin@voca.audiocodes.com

Report Details

Reports

Overall

Queue Name

Call Source

Exact

Call Destination

Exact

Wait Time (Sec.)

From

To

Status

Any

Timezone Display Mode

Tenant Time zone

Cancel

Schedule

4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

The procedure below describes how to delete a Report Scheduler.

➤ To delete a Report Scheduler:

1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

Action + New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|--------------------------|----------------|--------------------------|------------------|---------------|-------------------------------------|
| <input type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 |< < > >|

2. Select the report schedule that you wish to delete by selecting the corresponding **Report Schedule** check box.

Report Scheduler

Action + New Scheduled

| <input checked="" type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT | STATUS |
|-------------------------------------|----------------|--------------------------|------------------|--------|-------------------------------------|
| <input checked="" type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 |< < > >|

3. From the 'Actions' drop-down menu, choose **Delete**.

Journey Manager Report

The Journey Manager Report displays a summary of calls with a full detailed flow, from the moment it enters to the questions asked and answers provided.

➤ To generate the Journey Manager report:

1. Open the Journey Manager Report page (**Reports > Interaction Center Reports > Journey Manager**); the following appears:

Interaction Center Reports

The screenshot shows the 'Journey Manager' header and a 'Filter Options' section. The filters include:

- Date From** and **Date To**: Each has a date input field, a calendar icon, and a clear icon.
- Call Source**: A text input field followed by a dropdown menu set to 'Exact'.
- DNIS**: A dropdown menu set to 'Any'.
- Queue Name**: A dropdown menu set to 'Any'.
- Call Disposition**: A dropdown menu set to 'Any'.
- Timezone Display Mode**: A dropdown menu set to 'Tenant Time zone'.

At the bottom of the filter section 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 to generate your report:

- **Date From:** Displays this report for a specific date/time range.
- **Date To:** Displays this report for a specific date/time range.
- **Call Source:** Displays information that is related to a specific source number.
- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Queue Name:** Defines a specific queue name or 'Any' to show statistics for all call queues.
- **Call Disposition:** Defines information that relates to calls that ended with a specific disposition or 'Any'. For an explanation of the different call disposition, refer to [Call Dispositions](#) on page 171.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Displays the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Displays the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Displays the information in this report based on the browser local time zone.

3. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

4. The following is a description of the report fields.

| Field | Description |
|-------------|--|
| Date | Defines the date of the call. |
| Timezone | Defines the time zone of the call. |
| Source | Defines the phone number the call was made from. |
| Destination | Defines the telephone number that was dialed by the caller. |
| Duration | Defines the time between when the call is inserted into the queue until the call was transferred, abandoned, or reached the over-flow limit. |
| DNIS Name | Defines the name of the IVR service. |
| Queue Name | Defines the Queue name that got the call. |
| Queue Time | Defines the total time that the customer waited in the queue. |
| Talk Time | Defines how long the worker was in the talking state. |
| Disposition | Displays the disposition of the call. |
| Routed To | Defines the number where the call has been routed to. |

Call Queue Reports

| Journey Manager | | | | | | | | | | | |
|---------------------|-----------|---------|--------------|----------|------------|------------|------------|-----------|------------------------|-----------|--|
| Filter Options | | | | | | | | | | | |
| Show 25 entries | | | | | | | | Search: | | | |
| Date | Timezone | Source | Destination | Duration | DNIS Name | Queue Name | Queue Time | Talk Time | Disposition | Routed To | |
| 2023-12-27 10:49:43 | UTC +2:00 | +97254 | | 00:00:55 | regression | Queue 1 | 00:00:53 | 00:00:00 | Call abandoned | | |
| 2023-12-11 15:08:26 | UTC +2:00 | +97254 | | 00:00:38 | regression | Queue 2 | 00:00:36 | 00:00:00 | Call abandoned | | |
| 2023-12-11 15:03:36 | UTC +2:00 | +97254 | | 00:00:04 | regression | Queue 1 | 00:00:02 | 00:00:00 | Call abandoned | | |
| 2023-12-10 15:54:02 | UTC +2:00 | +97254 | | 00:00:15 | regression | Queue 3 | 00:00:13 | 00:00:00 | Call abandoned | | |
| 2023-12-10 15:53:03 | UTC +2:00 | +97254 | | 00:00:09 | regression | Queue 2 | 00:00:06 | 00:00:00 | Call abandoned | | |
| 2023-12-10 15:48:21 | UTC +2:00 | +97254 | | 00:00:25 | regression | Queue 1 | 00:00:17 | 00:00:00 | Call abandoned | | |
| 2023-11-27 14:22:24 | UTC +2:00 | +972549 | | 00:00:19 | regression | Queue 1 | 00:00:02 | 00:00:00 | Transfer | +97239 | |
| 2023-11-22 13:55:51 | UTC +2:00 | +97254 | +97239764820 | 00:01:09 | regression | Queue 1 | 00:00:54 | 00:00:00 | Transferred from Queue | +97239 | |
| 2023-11-22 13:31:00 | UTC +2:00 | +97254 | | 00:00:27 | regression | Queue 2 | 00:00:06 | 00:00:00 | Call abandoned | | |
| 2023-09-05 14:53:49 | UTC +2:00 | +97254 | | 00:00:10 | regression | Queue 3 | 00:00:03 | 00:00:00 | Max Wait Time Exceeded | | |

- Click on any call to view its flow, separated by relevant sections.

| | | | | | | | | | | |
|-------------------------------------|---------------------|-------------------|---------------|------------------------|----------|--------------------------------|-------------|----------|----------|------------|
| <div><div></div></div> | 2023-12-27 11:36:27 | UTC +2:00 | +972526403466 | 555111 | 00:03:19 | N/A | Skill Based | 00:00:00 | 00:00:00 | Disconnect |
| ▼ Interaction Manager (Voice) | | | | | | | | | | |
| Time | | Action | | Description | | Content | | Result | | |
| 11:36:10 | | Go to Menu | | Default Speech Menu | | - | | - | | |
| ➤ Speech Menu (Default Speech Menu) | | | | | | | | | | |
| ▼ Queue (Skill Based) | | | | | | | | | | |
| Time | | Action | | Description | | Content | | Result | | |
| 11:36:27 | | Overflow | | All agents are offline | | - | | - | | |
| 11:36:27 | | Play Prompt | | Busy | | - | | - | | |
| 11:36:32 | | Send SMS | | - | | - | | Succeed | | |
| 11:36:32 | | Transfer to Queue | | Journey 2 | | Priority: | | - | | |
| ▼ Queue (Journey 2) | | | | | | | | | | |
| Time | | Action | | Description | | Content | | Result | | |
| 11:36:33 | | Queue Info | | Call Position: 1 | | Number of Available Workers: 0 | | - | | |
| 11:39:28 | | Call Disposition | | Call abandoned | | - | | - | | |
| 11:39:28 | | Disconnect | | - | | - | | - | | |

Worker Activity Report

The Worker Activity Report displays a summary of workers' activities, including calls and workers state activities.

➤ To generate a Worker Activity report:

1. Open the Filter Options screen (**Reports > Interaction Center Reports > Worker Activity Report**); the following appears:

Interaction Center Reports

Worker Activity Report

Filter Options

Interval ☐ Use Interval

Date From

Date To

Worker

Worker Group

Extension

Timezone Display Mode

Generate

Export CSV

Reset Filter

2. Select the appropriate filter fields:
 - **Interval:** Defines how the report's date intervals are segmented. Select the box to reveal a drop-down list of predefined time periods, based on the customer's end date ("Date To"):
 - ◆ **Last Day:** Displays data from the past day, segmented by hours.
 - ◆ **Last Week:** Displays data from the previous week, separated by days.

- ◆ **Last Month:** Displays data from the previous month, categorized by weeks.
- ◆ **Last Year:** Displays data from the last year, organized by months.
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Workers:** Defines information that is related to a specific worker.
- **Worker Group:** Defines information that is related to a specific worker group.
- **Extension:** Defines information that is related to a specific extension.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the **Telephony Setting** settings.
 - ◆ **Local time zone (Web):** Display the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Field | Description |
|------------------------|---|
| Worker Name | Defines the first name and last name of the Worker. |
| Worker Extension | Defines the Worker's extension number. |
| Total Calls | Defines the total number of outbound and inbound calls. |
| Outbound Calls | Defines the total number of outbound calls. Outbound calls refer to calls that workers manually dial. |
| Inbound Calls | Defines the total number of inbound calls. Inbound calls refer to calls received by workers via queues or direct calls. |
| Calls Presented | Defines the number of calls routed to the Worker, regardless of whether the Worker picked up the call. |
| Calls Handled | Defines the number of calls that were accepted by the worker. |
| Calls Declined | Defines the number of calls that were not answered or were declined by the Worker. |
| Calls Handle Ratio (%) | Defines the Handle ratio = Calls that the Worker handled / Calls that are routed to the Worker (Overall percentage). |
| Transfer Out | Defines the available field for queued calls. Defines the number of |

| Field | Description |
|-------------------|---|
| | calls that were transferred by the worker to other workers. |
| Max Talk Time | Defines the longest talk time of any call that the Worker handled. Talk Time refers to the elapsed time, between the time a Worker connects to a call and the time that the call is disconnected or transferred, including hold time. |
| Avg. Talk Time | Defines the average talk time for calls that the Worker handled. |
| Avg. Hold Time | Defines the average hold time for calls that the Worker handled. |
| Max. Hold Time | Defines the longest hold time of any call that the Worker handled. |
| Avg. Consult Time | Defines the average consult time of any call that the Worker handled. |
| Max Consult Time | Defines the longest consult time of any call that the Worker handled. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

Worker Activity Report

Filter Summary

Filter Options

Show 25 entries

Search

| Worker Name | Extension | Total Calls | Outbound Calls | Inbound Calls | Calls Presented | Calls Handled | Calls Declined | Calls Handle Ratio (%) | Transfer Out | Max. Talk Time | Avg. Talk Time | Max. Hold Time |
|-------------|-----------|-------------|----------------|---------------|-----------------|---------------|----------------|------------------------|--------------|----------------|----------------|----------------|
| Worker 1 | +1095844 | 6 | 0 | 6 | 2 | 1 | 1 | 50 | 0 | 00:00:23 | 00:00:23 | 00:00:00 |
| Worker 2 | +1095845 | 67 | 0 | 67 | 67 | 60 | 7 | 90 | 18 | 00:09:06 | 00:01:50 | 00:03:30 |

Queue Activity Report

The Queue Activity Report displays summarized information of calls for each queue - e.g., Presented, Handled and Abandoned.

The procedure below describes how to generate a Queue Activity Report.

➤ To generate a queue activity report:

1. Open the Filter Options page (**Reports > Interaction Center Reports > Queue Activity Report**); the following appears:

Interaction Center Reports

The screenshot shows the 'Queue Activity Report' filter options. It includes a green header bar with a dropdown arrow and the text 'Filter Options'. Below this, there are several filter fields: 'Interval' with a checkbox 'Use Interval'; 'Date From' and 'Date To' with calendar icons and clear buttons; 'Queue Name' with a dropdown menu currently showing 'Any'; and 'Timezone Display Mode' with a dropdown menu currently showing 'Tenant Time zone'. At the bottom, there are three buttons: 'Generate' (blue with a checkmark), 'Export CSV' (orange with a document icon), and 'Reset Filter' (grey with a downward arrow).

2. Select the appropriate filter fields to generate your report:

- **Interval:** Defines how the report's date intervals are segmented. Select the check-box to reveal a drop-down list of predefined time periods, based on the customer's end date ("Date To"):
 - ◆ **Last Day:** Displays data from the past day, segmented by hours.
 - ◆ **Last Week:** Shows data from the previous week, separated by days.
 - ◆ **Last Month:** Presents data from the previous month, categorized by weeks.
 - ◆ **Last Year:** Displays data from the last year, organized by months.
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
- **Timezone Display Mode:** Defines this report in a different time zone.
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the **Telephony Setting** settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Field | Description |
|-----------------|--|
| Queue Name | Defines the queue to which the call is queued. |
| Calls Presented | Defines the number of calls routed to the queue, regardless of |

| Field | Description |
|---------------------------|---|
| | whether a Worker picked up the call. |
| Calls Handled | Defines the number of calls that are handled by this Queue. A call is handled if a caller is connected to a Worker while queued for this Queue. |
| Max. Handle Time | Defines the longest handle time of any call that the queue handled by the Worker. |
| Avg. Handle Time | Defines the average handle time for all calls that the queue handled by the Worker. |
| Avg. Queue Time | Defines the average queue time for all calls routed to the Queue, including answered and abandoned calls. |
| Max. Queue Time | Defines the longest queue time of any one call that was routed to the Queue. |
| Avg. Answer Speed | Defines the Average Answer Speed = Total queue time / Calls handled. |
| Num. of Abandoned Call | Defines the calls that are routed to the queue that were not answered by a Worker because the caller hung up while in the queue |
| Abandoned – Avg. | Defines the average time the calls are in the queue before being abandoned. |
| Abandoned – Max. | Defines the longest time any call is in the queue before being abandoned. |
| Abandoned – Avg. per Day | Defines the average time any call is in the queue before being abandoned. |
| Abandoned – Max. per Day | Abandoned – Max. per Day, defines the average abandoned calls in a day = Number of calls abandoned / Number of days. |
| Overflow - Max Call Limit | Defines the number of all the calls that overflowed due to exceeding the defined threshold for call limits (in number of calls) for each queue. |
| Overflow - Max Wait Time | Overflow - Max Wait Time Defines the number of all the calls that overflowed due to exceeding the defined threshold for waiting time (in seconds) for each queue. |
| Overflow - Max Wait- | Defines the number of all the calls that overflowed when all |

| Field | Description |
|----------|------------------------|
| ing Time | agents are logged out. |

- Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

| Queue Activity | | | | | | | | | | | | | |
|-----------------------------|-----------------|-----------------|---------------|------------------|------------------|-----------------|-----------------|-------------------|-------------------------|----------|----------|----------|---------|
| Filter Summary | | | | | | | | | | | | | |
| Filter Options | | | | | | | | | | | | | |
| Show 25 entries | | | | | | | | | | | | | |
| Search | | | | | | | | | | | | | |
| # | Queue Name | Calls Presented | Calls Handled | Max. Handle Time | Avg. Handle Time | Avg. Queue Time | Max. Queue Time | Avg. Answer Speed | Num. of Abandoned Calls | Avg. | Max. | Avg. per | Abandon |
| 1 | Help_desk Queue | 1 | 1 | 00:01:55 | 00:00:55 | 00:00:16 | 00:00:16 | 00:00:16 | 0 | 00:00:00 | 00:00:00 | 00:00:00 | |
| Showing 1 to 1 of 1 entries | | | | | | | | | | | | | |

Abandoned Call Report

An Abandoned Call Report displays the actual information about calls that were abandoned.

The procedure below describes how to generate an Abandoned Call Detail Report.

➤ To generate an Abandoned Call Report:

- Open the Filter Options page (**Reports > Interaction Center Reports > Abandoned Call Report**); the following appears:

| Interaction Center Reports | | | | | | | | | | | | | | | | | |
|--|--|------------------|--|--|--|--|--|--|--|-------|--|--|--|--|--|--|--|
| Abandoned Call Detail Activity | | | | | | | | | | | | | | | | | |
| Filter Options | | | | | | | | | | | | | | | | | |
| Date From | | | | | | | | | | | | | | | | | |
| Date To | | | | | | | | | | | | | | | | | |
| Queue Name | | Any | | | | | | | | | | | | | | | |
| Called Number | | | | | | | | | | Exact | | | | | | | |
| Call ANI | | | | | | | | | | Exact | | | | | | | |
| Timezone Display Mode | | Tenant Time zone | | | | | | | | | | | | | | | |
| <div> <div>Generate</div> <div>Export CSV</div> <div>Reset Filter</div> </div> | | | | | | | | | | | | | | | | | |

- Select the appropriate filter fields:
 - Date From:** Defines this report for a specific time range.
 - Date To:** Defines this report for a specific time range.

- **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
- **Called Number:** Defines information that is related to a specific destination number.
- **Called ANI:** Defines information that is related to a specific source number.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the **Telephony Setting** settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

The following is a description of the report fields.

| Field | Description |
|-----------------------|--|
| Call Start Time | Defines the date and time that the call started. |
| Called Number | Defines the telephone number that was dialed by the caller. |
| Call ANI | Defines the originator's telephone number ANI (Automatic Number identification). |
| Call Routed Queue | Defines the queue to which the call is queued. |
| Call Abandonment Time | Defines the date and time the call was abandoned. |
| Time to Abandon | Defines the elapsed time between the time the call comes to the system and the time it is abandoned. |

3. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

| Abandoned Call Detail Activity | | | | | | |
|--------------------------------|---------------------|---------------|--------------|-------------------|-----------------------|-----------------|
| Filter Summary | | | | | | |
| Filter Options | | | | | | |
| Show 25 entries | | | | Search: | | |
| # | Call Start Time | Called Number | Call ANI | Call Routed Queue | Call Abandonment Time | Time to Abandon |
| 1 | 2022-02-28 11:56:31 | +97281234567 | +97227654321 | Support1 | 2022-02-28 12:00:05 | 00:03:34 |
| 2 | 2022-02-27 14:48:56 | +97281234567 | +97227654321 | Support1 | 2022-02-27 14:49:54 | 00:00:58 |

Worker Call Report

The Worker Call Report presents a summary of each call that is dialed and received by the Worker. The report also includes the type of each call (Inbound/Outbound).

➤ **To generate an Worker Call Report:**

1. Open the Filter Options page (**Reports > Interaction Center Reports > Worker Call Report**); the following appears:

Interaction Center Reports

Worker Call Detail Activity

Filter Options

| | | | | |
|-----------------------|---|-------|----------------------|--|
| Date From | <input type="text"/> | | <input type="text"/> | |
| Date To | <input type="text"/> | | <input type="text"/> | |
| Workers | <input type="text" value="Any"/> ▼ | | | |
| Worker Extension | <input type="text"/> | Exact | ▼ | |
| Queue Name | <input type="text" value="Any"/> ▼ | | | |
| Called Number | <input type="text"/> | Exact | ▼ | |
| Call ANI | <input type="text"/> | Exact | ▼ | |
| Call Type | <input type="text" value="Any"/> ▼ | | | |
| Timezone Display Mode | <input type="text" value="Tenant Time zone"/> ▼ | | | |

Generate
Export CSV
Reset Filter

2. Select the appropriate filter fields to generate your report:
 - **Date From:** Defines this report for a specific time range.
 - **Date To:** Defines this report for a specific time range.
 - **Workers:** Defines information that is related to a specific worker.
 - **Workers Extension:** Defines information that is related to a specific extension.
 - **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
 - **Called Number:** Defines information that is related to a specific destination number.
 - **Call ANI:** Defines information that is related to a specific source number.
 - **Call Type:** Defines information that is related to a specific call type:
 - ◆ **Any:** Defines the information that is related to inbound and outbound calls.
 - ◆ **Inbound:** Defines the information that is related to all the inbound calls.
 - ◆ **Outbound:** Defines the information that is related to all the outbound calls.

- **Timezone Display Mode:** Display this report in different time zone. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Display the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Display the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Display the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Report Column | Description |
|-------------------|---|
| Worker Name | Defines the name of the worker. |
| Worker Extension | Defines the extension of the worker. |
| Call Start Time | Defines the date and time the call started. |
| Call End Time | Defines the date and time the call ended. |
| Call Type | Defines whether the call was inbound or outbound. |
| Answering Device | Defines whether the call was answered via the Voca Worker App or via Microsoft Teams. |
| Call Duration | Defines the duration of the call. |
| Status | Defines whether the call was 'Accepted' or 'Declined' by the worker. |
| Called Number | Defines the telephone number that the caller dialed. |
| Call ANI | Defines the originator's telephone number (ANI = Automatic Number Identification). |
| Call Routed Queue | Defines the queue to which the call is queued. |
| Call Skills | Defines the skills that are associated with the queue to which the call is routed. |
| Talk Time | Defines how long the worker was in the talking state. |
| Hold Time | Defines how long the call was put on hold. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

Worker Call Report

▼ Filter Options

Show 25 entries

| Worker Name | Extension | Call Start Time | Call End Time | Call Type | Answering Device | Call Duration | Status | Called Number | Call ANI | Call Routed Queue | Call Skills | Talk Time | Hold Time | Consult Time | Wrap-up Time |
|-------------|-----------|---------------------|---------------------|-----------|------------------|---------------|----------|---------------|----------|-------------------|------------------------|-----------|-----------|--------------|--------------|
| Someone | +1234567 | 2023-12-04 14:31:47 | 2023-12-04 14:31:57 | Inbound | Voca Worker App | 00:00:10 | Declined | +7654321 | +1111111 | IT_SKILLED_Q | IT_HARDWARE_IT_GENERAL | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 |

Worker Login-Logout Report

The Worker Login-Logout Report presents the workers' Logged-in and Logged-out times. This report is separated by each Worker's name.

➤ To generate a Worker State Report:

1. Open the Filter Options page (**Reports > Interaction Center Reports > Worker Login-Logout Report**); the following appears:

Interaction Center Reports

Worker Login-Logout Report

▼ Filter Options

| | | | | |
|-----------------------|---|--|----------------------|--|
| Date From | <input type="text"/> | | <input type="text"/> | |
| Date To | <input type="text"/> | | <input type="text"/> | |
| Worker | <input type="text" value="Any"/> | | | |
| Worker Group | <input type="text" value="Any"/> | | | |
| Timezone Display Mode | <input type="text" value="Tenant Time zone"/> | | | |

2. Select the appropriate filter fields to generate your report:
 - **Date From:** Defines this report for a specific time range.
 - **Date To:** Defines this report for a specific time range.
 - **Worker:** Defines information that is related to a specific worker.
 - **Worker Group:** Defines information that is related to a specific worker group.
 - **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.

- ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Report Column | Description |
|-------------------|---|
| Worker Name | Defines the name of the worker. |
| Logged-In Time | Defines the date and hour of the login. |
| Logged-Out Time | Defines the date and hour of the logout. |
| Logged-Out Reason | Defines the cause of the logout: <ol style="list-style-type: none"> 1. Supervisor Logout: When the supervisor logs out the worker. 2. Connection Lost: Indicating network issues. 3. Worker Logout: Worker-initiated logout from the Worker Application. |
| Duration | Defines the elapsed time between the login and logout time. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

| Worker Name | Logged-In Time | Logged Out Time | Logged Out Reason | Duration |
|-------------|---------------------|---------------------|-------------------|----------|
| Worker 1 | 2023-08-14 08:10:16 | 2023-08-14 14:04:21 | Connection Lost | 05:54:05 |
| | 2023-08-14 14:19:36 | 2023-08-14 18:01:39 | Worker Logout | 03:42:03 |
| | 2023-08-15 08:23:30 | 2023-08-15 08:56:45 | Worker Logout | 00:33:15 |
| | 2023-08-15 08:58:25 | 2023-08-15 13:20:22 | Connection Lost | 04:21:57 |
| | 2023-08-15 14:52:31 | 2023-08-15 17:51:00 | Worker Logout | 02:58:29 |
| | 2023-08-16 08:19:31 | 2023-08-16 10:16:22 | Connection Lost | 01:56:51 |
| | 2023-08-16 10:52:33 | 2023-08-16 18:01:05 | Worker Logout | 07:08:32 |

Worker State Detail Report

The Worker State Detail Report displays the amount of time that workers spend in different states. The Report provides a detailed breakdown of the Workers' state transitions. This report is divided by the Worker's name.

➤ To generate a Worker State Detail Report:

1. Open the Filter Options page (**Reports > Interaction Center Reports > Worker State Detail Report**); the following appears:

Interaction Center Reports

Worker State Detail Report

Filter Options

Date From

Date To

Worker

Any

State

Any

Timezone Display Mode

Tenant Time zone

Generate

Export CSV

Reset Filter

2. Select the appropriate filter fields to generate your report:

- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.
- **Workers:** Defines information that is related to a specific worker.
- **State:** Defines information that is related to a specific worker state or “Any”. The worker state can be any of the following values:
 - ◆ **Any:** Defines the information that related to all states.
 - ◆ **Logged-in:** Defines the information that is related only to the login time.
 - ◆ **Not Ready:** Defines the information that related only to the not ready time.
 - ◆ **In a Call:** Defines the information that is related only to the talking time.
 - ◆ **Wrap-up:** Defines the information that is related only to the wrap-up time.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Report Column | Description |
|---------------|---|
| Worker Name | Defines the name of the worker. |
| State | Defines the various states in which a Worker can be in. |

| Report Column | Description |
|---------------|---|
| Sub State | Defines the 'Sub' state information related to the state (e.g., Not-Ready reasons). |
| Start Time | Defines the start date and hour. |
| End Time | Defines the end date and hour. |
| Duration | Defines the amount of time a worker spends in a particular state. |

- Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

| Worker State Detail Report | | | | | | |
|----------------------------|-----------|---------------|---------------------|---------------------|----------|--|
| Filter Options | | | | | | |
| Show All entries | | | Search: | | | |
| Worker Name | State | Sub State | Start Time | End Time | Duration | |
| Worker 1 | Login | - | 2023-07-11 10:25:48 | N/A | N/A | |
| | Not Ready | Shift Start | 2023-07-11 10:25:48 | 2023-07-11 10:25:55 | 00:00:07 | |
| | | Outbound | 2023-07-11 10:35:58 | 2023-07-11 10:39:04 | 00:03:06 | |
| | In a Call | Outbound Call | 2023-07-11 10:36:03 | 2023-07-11 10:38:52 | 00:02:49 | |
| | Not Ready | Launch Break | 2023-07-11 10:39:08 | 2023-07-11 10:39:11 | 00:00:03 | |

Worker State Summary Report

The Worker State Summary Report displays a summary of the time workers spend in various states. This report is divided by Worker's names.

➤ To generate a Worker State Report:

- Open the Filter Options page (**Reports > Interaction Center Reports > Worker State Summary Report**); the following appears:

| Worker State Summary Report | | | |
|---|---|--|--|
| Filter Options | | | |
| Date From | <input type="text"/> | | |
| Date To | <input type="text"/> | | |
| Worker | <input type="text" value="Any"/> | | |
| State | <input type="text" value="Any"/> | | |
| Timezone Display Mode | <input type="text" value="Tenant Time zone"/> | | |
| <input type="button" value="Generate"/> <input type="button" value="Export CSV"/> <input type="button" value="Reset Filter"/> | | | |

- Select the appropriate filter fields to generate your report:
 - Date From:** Defines this report for a specific time range.

- **Date To:** Defines this report for a specific time range.
- **Worker:** Defines information that is related to a specific worker.
- **State:** Defines information that is related to a specific worker state or “Any”. The worker state can be any of the following values:
 - ◆ **Any:** Defines the information that relates to all states.
 - ◆ **Logged-in:** Defines the information that is related only to the login time.
 - ◆ **Ready:** Defines the information that is related only to the ready time.
 - ◆ **Not Ready:** Defines the information that is related only to the not ready time.
 - ◆ **In a Call:** Defines the information that is related only to the talking time.
 - ◆ **Wrap-up:** Defines the information that is related only to the wrap-up time.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Report Column | Description |
|---------------|---|
| Worker Name | Defines the name of the worker. |
| State | Defines the various states in which a worker can be. |
| Sub State | Defines the 'Sub' state information related to the state (e.g., Not-Ready reasons). |
| Total | Defines the total time the worker spent on a sub state. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

Interaction Center Reports

Worker State Summary Report

Filter Summary

Filter Options

Show All entries Search:

| Worker Name | State | Sub State | Total |
|-------------|-----------|-------------|----------|
| Worker 1 | Login | - | 48:32:50 |
| | Ready | - | 48:20:07 |
| | Not Ready | Shift Start | 00:12:43 |
| | In a Call | Talking | 00:00:26 |
| | | Hold | 00:00:00 |
| | | Consult | 00:00:00 |

Real-Time Dashboard

The Interaction Center Dashboard enables supervisors to monitor the workers and queue activity by creating customized dashboards to get real-time insights on interaction center performance.

Adding a Real-Time Dashboard

The procedure below describes how to add a new real-time dashboard.

➤ **To add a new real-time dashboard:**

1. Open the Dashboards page (**Reports > Interaction Center Reports > Real-time Dashboard**); the following appears:

Dashboards

+ Add New Actions

Show 100 entries Search:

| Name | Description | Dashboard URL |
|----------------------------|-------------|---------------|
| No data available in table | | |

Showing 0 to 0 of 0 entries

2. The following is a description of the fields to be entered:

| Report Column | Description |
|---------------|--|
| Name | Defines the name of the dashboard. |
| Description | Defines the dashboard description. |
| Dashboard URL | Opens the dashboard in a new window with a permanent link. |

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

New Dashboard

Name*

Description

Queue Name*


NO. OF PENDING CALLS ● 0 ● 1

NO. OF CALLS ABANDONED ● 0 ● 1

LONGEST WAITING TIME ● 0 ● 1

AVERAGE ANSWERING TIME ● 0 ● 1

AVERAGE WAITING TIME ● 0 ● 1



[Save Changes](#)

4. The following is a description of the fields to be entered:

| Field | Description |
|------------------------|---|
| Name | Defines the name of the dashboard. |
| Description | Defines the dashboard description. |
| Queue Name | Defines the queue to be monitored from the drop-down list. |
| No. of Pending Calls | Defines the minimum and maximum threshold for calls waiting in the queue. |
| No. of Calls Abandoned | Defines the minimum and maximum threshold for abandoned calls. |
| Longest Waiting Time | Defines the minimum and maximum threshold for the longest call waiting in the queue (in seconds). |
| Average Answering Time | Defines the minimum and maximum threshold for the average answering time. |
| Average Waiting Time | Defines the minimum and maximum threshold for the average waiting time (in seconds). |

Additional queues can be added to the dashboard by pressing the (+) button.



The graphic view is generated automatically when up to two queues are configured. If more than two queues are configured, the dashboard displays a table view. The dashboard's data is reset every 24 hours at 00:00.

Editing a Real-Time Dashboard

The procedure below describes how to edit a real-time dashboard.

➤ To edit a real-time dashboard:

1. Open the Dashboards page (**Reports > Interaction Center Reports > Real-time Dashboard**); the following appears:

Dashboards

| Dashboards | | | + Add New | ⚙ Actions |
|--------------------------|--------|---------------------|---------------------------------|-----------|
| Show | 100 | entries | Search: <input type="text"/> | |
| <input type="checkbox"/> | Name | Description | Dashboard URL | |
| <input type="checkbox"/> | Dash 1 | The first dashboard | Go To Dashboard | |

Showing 1 to 1 of 1 entries

2. Select the dashboard you wish to edit by selecting the corresponding Dashboards check box.

Dashboards

| Dashboards | | | + Add New | ⚙ Actions |
|-------------------------------------|--------|---------------------|---------------------------------|---------------------------------------|
| Show | 100 | entries | Search: <input type="text"/> | |
| <input type="checkbox"/> | Name | Description | Dashboard URL | |
| <input checked="" type="checkbox"/> | Dash 1 | The first dashboard | Go To Dashboard | Edit Dashboard Delete Dashboard(s) |

Showing 1 to 1 of 1 entries

3. From the 'Actions' drop-down menu, choose **Edit Dashboard**; the following appears:

Edit Dashboard

Name*

Description

Queue Name*

NO. OF PENDING CALLS

NO. OF CALLS ABANDONED

LONGEST WAITING TIME

AVERAGE ANSWERING TIME

AVERAGE WAITING TIME

[+](#)

[Save Changes](#)

- Make your changes on the Edit Dashboard page, and then click **Save Changes**; the updated Dashboard details appear.

Deleting a Real-Time Dashboard

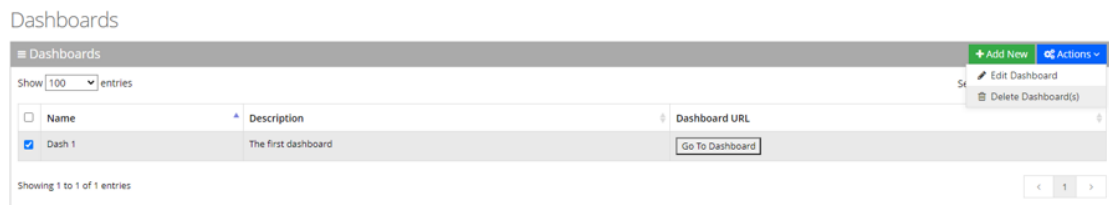
The procedure below describes how to delete a real-time dashboard.

➤ **To delete a real-time dashboard:**

- Open the Dashboards page (**Reports > IVR Reports > Real-time Dashboard**); the following appears:

| Dashboards | | |
|---------------------------------|-----------------------------|---|
| Dashboards | | + Add New Actions |
| Show 100 entries | Search <input type="text"/> | |
| <input type="checkbox"/> Name | Description | Dashboard URL |
| <input type="checkbox"/> Dash 1 | The first dashboard | Go To Dashboard |
| Showing 1 to 1 of 1 entries | | |

- Select the dashboard you wish to delete by selecting the corresponding Dashboards check box.



3. From the 'Actions' drop-down menu, choose **Delete Dashboard(s)**.
4. The following message appears: "Are you sure you want to delete the selected dashboard (s)?"
5. Click **OK** to delete the selected dashboard.

IVR Reports

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

- Report Scheduler
- Drill-down
- Overall Performance
- Call Date
- Call Hour
- Requested Contacts
- Requested Departments

Report Scheduler

The Report Scheduler provides an easy way to automate the generation of reports on a regular and recurring basis by setting up a schedule. Scheduled reports can run at predetermined times and automatically send to email recipients.



The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click [here](#).

Adding a Report Scheduler

The procedure below describes how to add a Report Scheduler.

➤ To add a new Report Scheduler:

1. Open the Report Scheduler page (**Reports > IVR Reports > Report Scheduler**); the following appears:

Report Scheduler

Action

+ New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|------------------------------------|---------------|------------|------------------|---------------|--------|
| Items per page: 10 0 of 0 < < > > | | | | | |

2. The following is a description of all the fields:

| Field | Description |
|------------------|---|
| Schedule Name | Defines the report scheduler name that was configured. |
| Start Date | Defines the start dates that were configured on the report scheduler. |
| Select Frequency | Defines the frequency that this report is sent. |
| Export Format | Defines the format in which this report is sent. |
| Status | Defines the status of the schedule report. |

3. Click **+ New Scheduled**; the following appears:

NEW SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Report export method

Start date & time

mm/dd/yyyy --:-- --

End date & time

mm/dd/yyyy --:-- --

Export Frequency

At

Daily

Time

--:-- --

Export Format

Report Details

Reports

Cancel

Schedule

4. The following is a description of the fields that must be entered:

| Field | Description |
|----------------------|--|
| Schedule Name | Defines the name of the scheduled report. |
| Report Export Method | Defines the method that this report is sent. |
| Start Date & Time | Defines the first time that this report is run. The Start Date & Time uses the time zone that is configured at the tenant level. |
| End Date & Time | Defines the last time that this report will be run. The End Date & Time uses the time zone that is configured at the tenant level. |
| Export Frequency | Defines the recurrence pattern for the scheduled report. |
| Time | Defines the time that this report will be generated. |
| Day | Defines the day that this report will be generated. This option is only available when the frequency is set to Weekly . |
| Range | Defines a specific time range within the month, or choose a custom day range within the month that the report will be generated. This option is only available when the frequency is set to Monthly . |
| Export Format | Defines the format that this report is sent in. |
| Email Subject | Defines the subject name of email that is sent. |
| Recipients | Defines the recipients who will be receiving the email. More than one recipient can be added. |
| Reports | Select the report to be scheduled. |

5. The following is a description of the filter that can be applied for this report:

| Field | Description |
|------------------|--|
| Queue Name | Filter by a specific queue. If that queue is not selected, it will be considered as any queue. |
| Call Source | Filter by a specific call source. |
| Call Destination | Filter by a specific call destination. |
| Wait Time (sec.) | Filter by Wait Time in seconds. |

6. Click **Save Changes**.

Editing a Report Scheduler

The procedure below describes how to edit a Report Scheduler.

➤ To edit a Report Scheduler:

1. Open the Report Scheduler page (**Reports > IVR Reports > Report Scheduler**); the following appears:

Report Scheduler

Action
+ New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|--------------------------|----------------|--------------------------|------------------|---------------|-------------------------------------|
| <input type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 |< < > >|

2. Select the report schedule that you wish to edit by selecting the corresponding **Report Schedule** check box.

Report Scheduler

Action
+ New Scheduled

| <input checked="" type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT | STATUS |
|-------------------------------------|----------------|--------------------------|------------------|--------|-------------------------------------|
| <input checked="" type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10 1 - 1 of 1 |< < > >|

3. From the 'Actions' drop-down menu, choose **Edit**; the following appears:

EDIT SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name

Daily Schedule

Report export method

Email

Start date & time

05/28/2023 01:41 PM

End date & time

05/31/2023 01:42 PM

Export Frequency

At

Daily

Time

01:41 PM

Export Format

XLSX

Email Subject

Overall - Daily

Recipients

admin@voca.audiocodes.com

Report Details

Reports

Overall

Queue Name

Call Source

Exact

Call Destination

Exact

Wait Time (Sec.)

From

To

Status

Any

Timezone Display Mode

Tenant Time zone

Cancel

Schedule

- Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

The procedure below describes how to delete a Report Scheduler.

➤ To delete a Report Scheduler:

- Open the Report Scheduler page (**Reports > IVR Reports > Report Scheduler**); the following appears:

Report Scheduler

Search

Action

New Scheduled

| <input type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT FORMAT | STATUS |
|--------------------------|----------------|--------------------------|------------------|---------------|-------------------------------------|
| <input type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | <input checked="" type="checkbox"/> |

Items per page: 10

1 - 1 of 1

<<

<

>

>>

- Select the report schedule that you wish to delete by selecting the corresponding **Report Schedule** check box.

Report Scheduler

Search

[Action](#)
[+ New Scheduled](#)

| <input checked="" type="checkbox"/> | SCHEDULE NAME | START DATE | SELECT FREQUENCY | EXPORT | STATUS |
|-------------------------------------|----------------|--------------------------|------------------|--------|--------|
| <input checked="" type="checkbox"/> | Daily Schedule | Jul 24, 2023, 1:06:00 PM | Daily | XLSX | |

Items per page: 10 1 - 1 of 1 < >

- From the 'Actions' drop-down menu, choose **Delete**.

Drill-down Report

The Drill-down Report displays the details of all the calls that were entered into Voca and how they were handled.

➤ **To generate a Drill-down report:**

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

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 | | | |
| Timezone Display Mode | Tenant Time zone | | | |

[Generate](#)
[Export CSV](#)
[Reset Filter](#)

- Select the appropriate filter fields:
 - Date From:** Defines this report for a specific date/time range.
 - Date To:** Defines this report for a specific date/time range.
 - Call Source:** Defines information that is related to a specific source number.
 - Call Routed:** Defines information that is related to a call that was routed to a specific destination.
 - Call Duration:** Defines information that is related to a specific duration of a call.

- **Call Disposition:** Defines information related to calls that ended with a specific disposition or “Any”. For an explanation of the different call dispositions, see [Call Dispositions](#).
- **DNIS:** Defines information that is related to a specific leading phone number.
- **Timezone Display Mode:** Defines this report in different time zone:
 - ◆ **Tenant Time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow Time zone:** Defines the information in this report based on the time zone configured under the **Telephony Setting** settings.
 - ◆ **Local Time zone (Web):** Defines the information in this report on the browser local time zone.

Filter Summary

▼ Filter Options

Show

25


 entries

Search:

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

3. The following is a description of the report fields.

| Report Column | Description |
|---------------|---|
| Customer | Defines the customer name. |
| Domain | Defines the domain name. |
| Source | Defines the phone number the call was made from. |
| Destination | Defines the destination phone number. |
| Start Time | Defines the start time of the call adjusted to the timezone selected in the filter. |
| End Time | Defines the end time of the call adjusted to the timezone selected in the filter. |
| Timezone | Defines the relevant timezone according to the option selected in the filter. |

| Report Column | Description |
|---|---|
| Duration | Defines the duration of the call. |
| Disposition | Defines the disposition of the call. |
| Routed To | Defines the number of where the call has been routed to. |
|  | Opens the CDR and displays more information, including a recording of the call. |

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

| | | | | | | | | | | | |
|---------------|----------|--------------|------|---------|---------------------|---------------------|-----------|---|----------|------|---|
| 212 | Attended | Attended.com | 5103 | 4567 | 2021-07-26 09:41:26 | 2021-07-26 09:41:44 | UTC +0:00 | 18 | Transfer | 5102 |  |
| Result String | | State ID | | Grammar | | Confidence | | Listen Record | | | |
| Station | | 1 | | Main | | 92 | | <div><div><div></div></div><div>0:00 / 0:02</div><div><div></div></div><div></div></div> | | | |

Each recognition includes the following:

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

- Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

| Filter Summary | | | | | | | | | | | |
|-----------------|-----------|---------------|--------|-------------|---------------------|---------------------|-----------|----------|---------------------------|-----------|--|
| Filter Options | | | | | | | | | | | |
| Show 25 entries | | | | | | | | | | | |
| # | Service | Domain | Source | Destination | Start Time | End Time | Timezone | Duration | Disposition | Routed To | |
| 1 | Time Zone | Time Zone.com | Mariya | 4111 | 2021-08-02 14:09:52 | 2021-08-02 14:09:58 | UTC +0:00 | 6 | Early Disconnect | | |
| 2 | Time Zone | Time Zone.com | Mariya | 4012 | 2021-07-29 10:12:39 | 2021-07-29 10:12:50 | UTC +0:00 | 11 | Disconnect | | |
| 3 | Time Zone | Time Zone.com | Mariya | 4445 | 2021-07-29 10:12:21 | 2021-07-29 10:12:31 | UTC +0:00 | 10 | Disconnect | | |
| 4 | Time Zone | Time Zone.com | Mariya | 4440 | 2021-07-29 10:12:02 | 2021-07-29 10:12:09 | UTC +0:00 | 7 | Early Disconnect | | |
| 5 | Time Zone | Time Zone.com | Mariya | 4440 | 2021-07-29 10:11:23 | 2021-07-29 10:11:38 | UTC +0:00 | 15 | Disconnect | | |
| 6 | Time Zone | Time Zone.com | Mariya | 4111 | 2021-07-29 10:10:28 | 2021-07-29 10:11:06 | UTC +0:00 | 38 | Missed calls notification | | |
| 7 | Time Zone | Time Zone.com | Mariya | 4009 | 2021-07-29 10:10:09 | 2021-07-29 10:10:23 | UTC +0:00 | 14 | Early Disconnect | | |
| 8 | Time Zone | Time Zone.com | Mariya | 4009 | 2021-07-29 10:09:31 | 2021-07-29 10:09:50 | UTC +0:00 | 19 | Early Disconnect | | |
| 9 | Time Zone | Time Zone.com | 5202 | 4445 | 2021-07-14 06:24:29 | 2021-07-14 06:24:39 | UTC +0:00 | 10 | Early Disconnect | | |
| 10 | Time Zone | Time Zone.com | 5202 | 4445 | 2021-07-14 06:21:11 | 2021-07-14 06:21:29 | UTC +0:00 | 18 | Transfer | 5203 | |

Overall Performance Report

The Overall Performance Report displays a summary of all the performance of the tenant.

➤ To generate an Overall Performance report:

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

IVR Reports

Overall Performance

Filter Options

Date From

Date To

Call Source

Exact

Call Routed

Exact

Call Duration

to

Call Disposition

Any

DNIS

Any

Timezone Display Mode

Tenant Time zone

Generate
Reset Filter

2. Select the appropriate filter fields:
 - **Date From:** Defines this report for a specific date/time range.
 - **Date To:** Defines this report for a specific date/time range.
 - **Call Source:** Defines information that is related to a specific source number.

- **Call Routed:** Defines information that is related to call that was routed to a specific destination.
- **Call Duration:** Defines information that is related to a specific duration of a call.
- **Call Disposition:** Defines information that is related to calls that ended with a specific disposition or “Any”.

For an explanation of the different call disposition, refer to [Call Dispositions](#).

- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Timezone Display Mode:** Defines this report in different time zones.

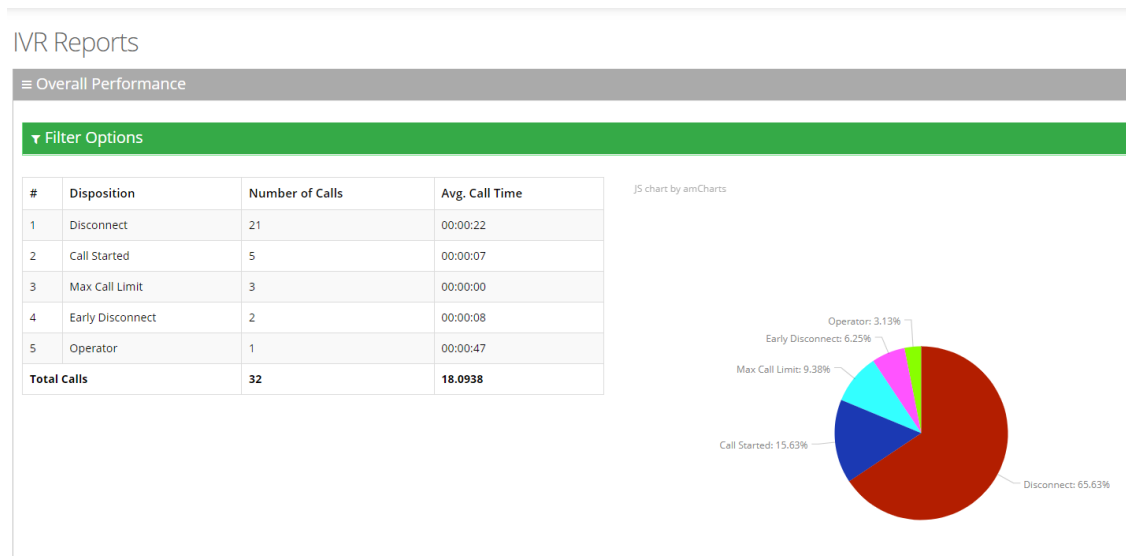
The time zone of calls can be one of the following options:

- ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
- ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
- ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

| Report Column | Description |
|-----------------|---|
| Disposition | Defines the disposition of the call. |
| Number of Calls | Defines the total number of calls for each disposition. |
| Avg. Call Time | Defines the average call time for each disposition. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.



Call Hour Report

The Call Hour Report displays a summary of call performance by the hour on one specific day.

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

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

Figure 7-1: Call Hour IVR Filter Options

2. Select the appropriate filter fields:

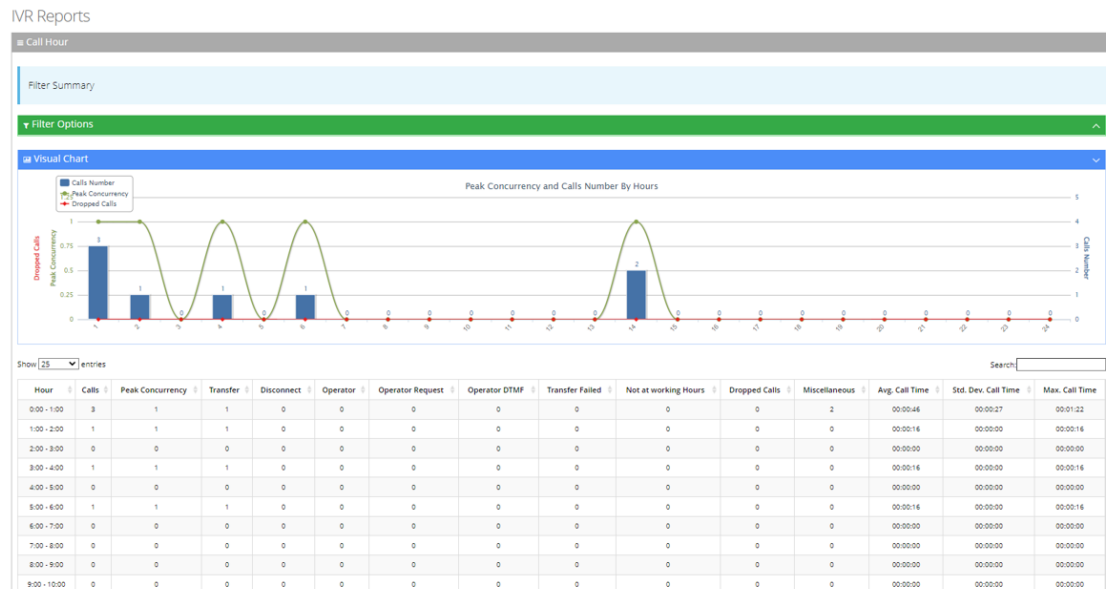
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Call Source:** Defines information that is related to a specific source number.
- **Call Routed:** Defines information that is related to calls routed to a specific destination.
- **Call Disposition:** Defines information that is related to calls that ended with a specific disposition or "Any". For an explanation of the different call dispositions, see [Call Dispositions](#).
- **DNIS:** Defines information that is related to a specific destination number.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields:

| Report Column | Description |
|---------------|--|
| Hour | Defines the time frame the calls were made in. |

| Report Column | Description |
|---------------------------|---|
| Calls | Defines the number of calls. |
| Peak Concurrency | Defines the maximum number of concurrent calls the system held for a specific period of time. |
| Transfer | Defines the number of transferred calls. |
| Disconnect | Defines the number of disconnected calls. Voca could have tried before to transfer the call with no answer. |
| Operator | Defines the number of calls transferred to the operator for some reason (not Operator Requested or Operator DTMF). |
| Operator Request | Defines the number of calls transferred to the Operator because the user pressed "0" and sent a DTMF to transfer the call to the Operator. |
| Operator DTMF | Defines 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 | Defines the number of calls that failed to be transferred. |
| Not at Working Hours | Defines the number of calls that entered the system outside of the working hours. |
| Dropped Calls | Defines 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 | Defines the number of calls with disposition other to the ones in other columns. |
| Avg. Call Time (sec) | Defines the average call time in seconds. |
| Std. Dev. Call Time (sec) | Defines the standard deviation in call time, in seconds. |
| Max. Call Time (sec) | Defines the maximum call time in seconds. |

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.



Requested Contacts Report

The Requested Contacts Report Displays a summary of contacts that were requested during Voca sessions and the transfer results.

➤ To generate a Requested Contacts report:

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

IVR Reports

Requested Contacts

Filter Options

Date From

Date To

Menu

Timezone Display Mode

2. Select the appropriate filter fields:
 - **Date From:** Defines this report for a specific date/time range.
 - **Date To:** Defines this report for a specific date/time range.
 - **Menu:** Defines information that related to specific menu or "Any".

- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

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

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

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 |

Requested Departments Report

The Requested Departments Report displays a summary of departments that were requested during Voca sessions and the transfer results.

➤ To generate a Requested Departments report:

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

Requested Departments

IVR Reports

Requested Departments

Filter Options

Date From

Date To

Menu

2. Select the appropriate filter fields:
 - **Date From:** Defines this report for a specific date/time range.
 - **Date To:** Defines this report for a specific date/time range.
 - **Menu:** Defines information that is related to specific menu or "Any".
 - **Timezone Display Mode:** Defines this report in different time zone. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in this report on the browser local time zone.

3. The following is a description of the report fields.

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

4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

IVR Reports

| Requested Departments | | | | | | | | | |
|-----------------------|-------|----------|------------|----------|------------------|---------------|-----------------|----------------------|---------------|
| Filter Summary | | | | | | | | | |
| Filter Options | | | | | | | | | |
| Show 25 entries | | | | | | | | | |
| 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 |

8 Actions

The following describes the different actions that are supported in Voca.

- **Play prompt:** Plays a prompt, and then performs the next action.
- **Go to menu:** Transfers the caller to the menu.
- **Transfer to Operator:** Transfers the call to the operator.
- **Collect and Dial:** Allows the user to press several DTMF keys, and then transfers the caller to the collected number.
- **Disconnect:** Automatically disconnects the caller.
- **Transfer to Phone:** Transfers the call to a defined phone number.
- **Silent Transfer to Phone:** Transfers the call to a defined phone number without playing the "Transferring the call to..." prompt.
- **Transfer to Extension:** Transfers the call to the extension number.
- **Attended Transfer:** Transfers the call to a predefined number in a supervised way. If the transfer destination is not reachable (e.g., busy, no answer), the next action is performed.
- **Send SMS:** Allows for an SMS message to be sent.



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.

- **Missed Call Notification:** A missed call notification will be sent to the customer via email. For this action, there are two options:
 - **Without Voice Recording:** The system doesn't let the customer leave a message and just sends an email notification for this missed call.
 - **With Voice Recording:** The system lets the user to leave a message, and then send an email notification with the recorded message.



The "Missed Call Notification" action is only applicable if Voca is integrated with the SMTP server. For more information refer to [Email Setting Configuration](#).

- **Go To Contact:** Transfers the call to specific contact.
- **Go to Department:** Transfers the call to specific department.
- **Transfer to Queue:** Transfers the call to a predefined call queue.

- **Go To Flow:** Transfers the call to predefined flow from the flow designer.
- **Leave Message:** Lets the user leave a message and send an email notification with the recorded message.



The "Leave Message" action is only applicable if Voca is integrated with the SMTP server.

9 Call Dispositions

The following describes the different call dispositions that are supported in Voca:

- **All Agents are Offline:** All worker/queue members are logged out from the queue.
- **Call Abandoned:** The call was abandoned while waiting in the queue.
- **Call Started:** Script execution failed. Error in Communication Portal software. Please contact Voca Team.
- **Disconnect:** Refers to calls that disconnected before the transfer (for example, 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).
- **DTMF Transfer:** The caller dialed the number during speech recognition, to be transferred to a specific extension.
- **Duplicate Name and Transfer to Operator:** Destination was recognized but due to duplicate names, the caller was transferred to the Operator.
- **Early Disconnect:** Refers to calls that were canceled by the caller before providing spoken input.
- **Flow Designer Error:** Refers to calls that reached flow designer incomplete flows.
- **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.
- **Max Call Limit Exceeded:** This limit is reached when the maximum number of concurrent calls exceeds the maximum number of calls that was configured in the Queue level.
- **Max Wait Time Exceeded:** This limit is reached when the maximum wait time exceeds the maximum wait time that was configured in the queue level.
- **Missed Calls Notification:** A missed call notification was successfully sent to the contact/email that was configured.
- **Missed Calls Notification Failed:** A missed call notification to the contact/email failed.
- **Not at Working Hours:** Refers to calls reaching the service out of working hours.
- **Operator:** Successfully transfers the call to the operator.
- **Operator is Disabled:** Tries to transfer the call to the operator, but operator is disabled.
- **Operator 2nd language:** IVR menu option for second language was selected.
- **Operator at Confirmation:** Calls that were transferred to the operator, due to missing confirmation before transferring the call.
- **Operator IVR Timeout:** The caller was routed to the operator when there was no response.

- **Operator Request:** The caller said “Operator” during speech recognition, to be transferred to the operator.
- **Operator Transfer Fail:** Transfer to the operator failed.
- **Transfer:** Successfully transferred the call.
- **Transfer Fail:** Tried to transfer the call and failed.
- **Transferred from Queue:** Successfully transferred from the queue to a member of the queue.
- **SMS Error:** Sending SMS failed.
- **SMS Sent:** Calls that resulted in successfully sending a SMS.

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