Administrator's Guide

AudioCodes Voice.AI Solutions

Voca Conversational Interaction Center

Version 10.5

Notice

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Related Documentation

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

Document Revision Record

LTRT	Description
28841	Initial document release for Version 10.
28842	Added Real-time Dashboard Reporting.
28843	Updated Managing Departments and Adding a Call Queue sections; removed Freeing Bindings, App Reports, Sending a VocaNOM App Invitation sections.
28844	Changes for Version 10.1 including--Configuring Telephony settings.
28845	Major changes for Version 10.3.
28846	Added the Access Management section; extended Supervisors' capabilities with new fields in the Configuring Call Queues and Workers sections.
28847	Added the Journey Manager Report to Call Queue Reports and Interaction Center Reports.

Software Revision Record

Software Revision	Release Date
10	April 2022
10.0.2	July 2022
10.1	December 2022
10.2	June 2023
10.3	September 2023
10.4	December 2023
10.5	January 2024

Table of Contents

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)

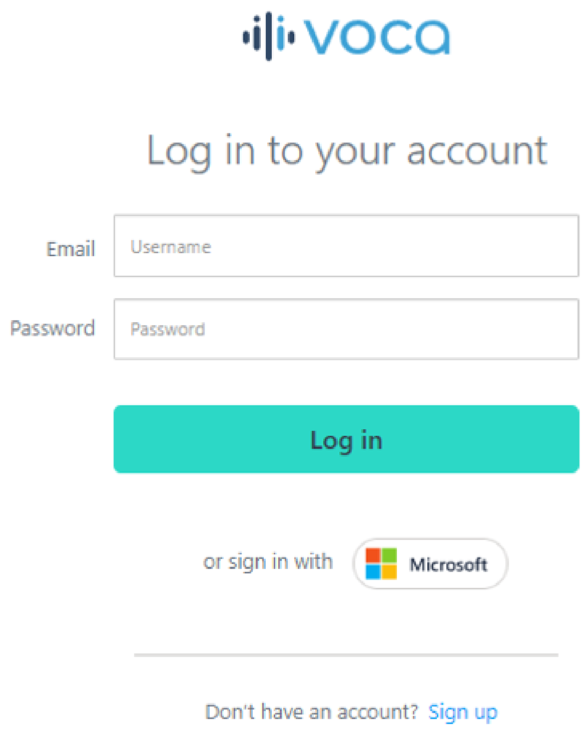
2 Getting Started

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.

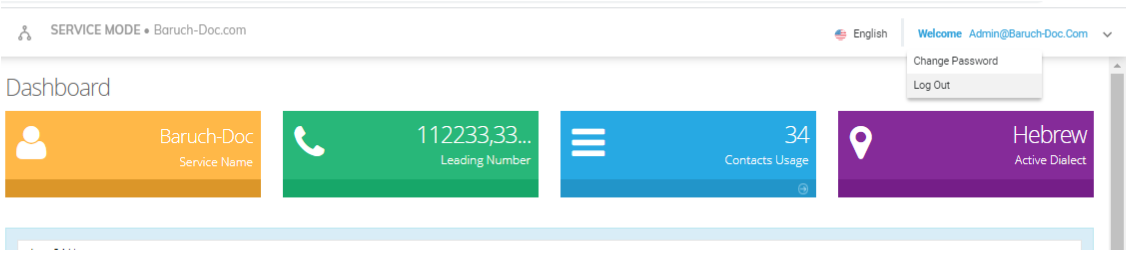


Changing your Password

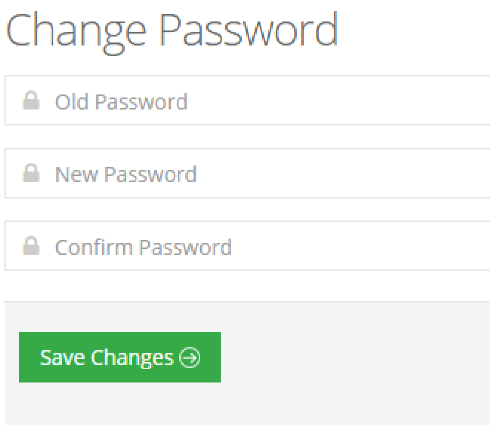
The procedure below describes how to change the login password.

➢ **To change the login password:**

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

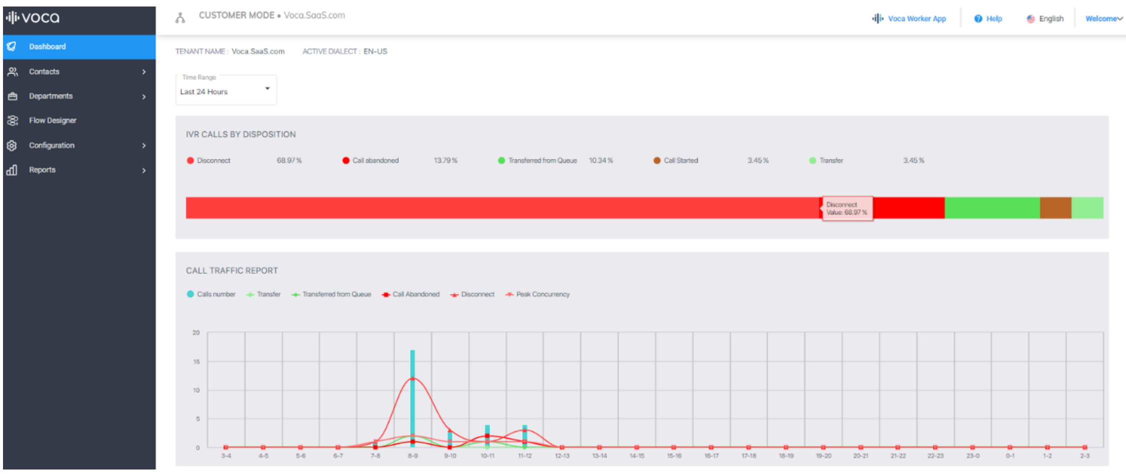


2. Select **Change Password** to change the password after initially logging in using the default (recommended); the following appears:



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:

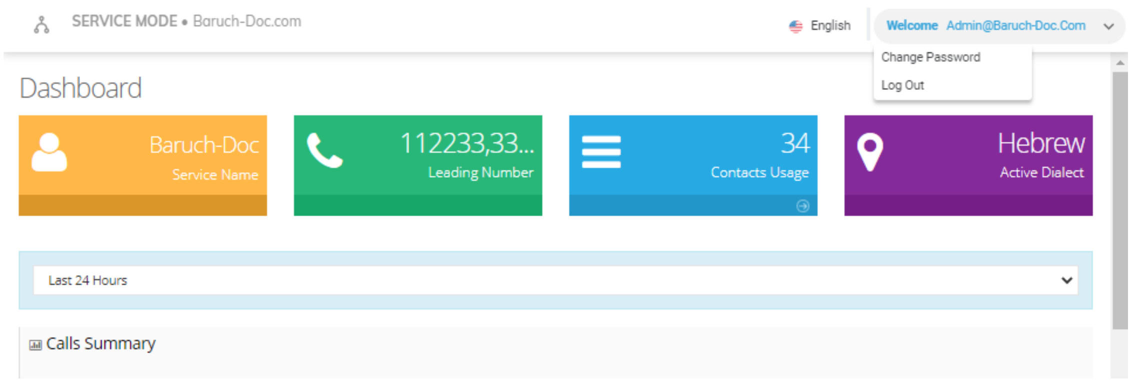
- Last 24 hours
- Last week
- Last month

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

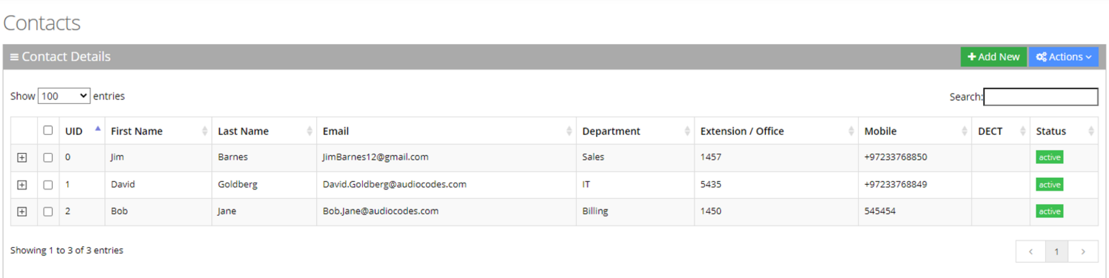
This section describes the various Contact Details actions that can be performed.

Adding a Contact

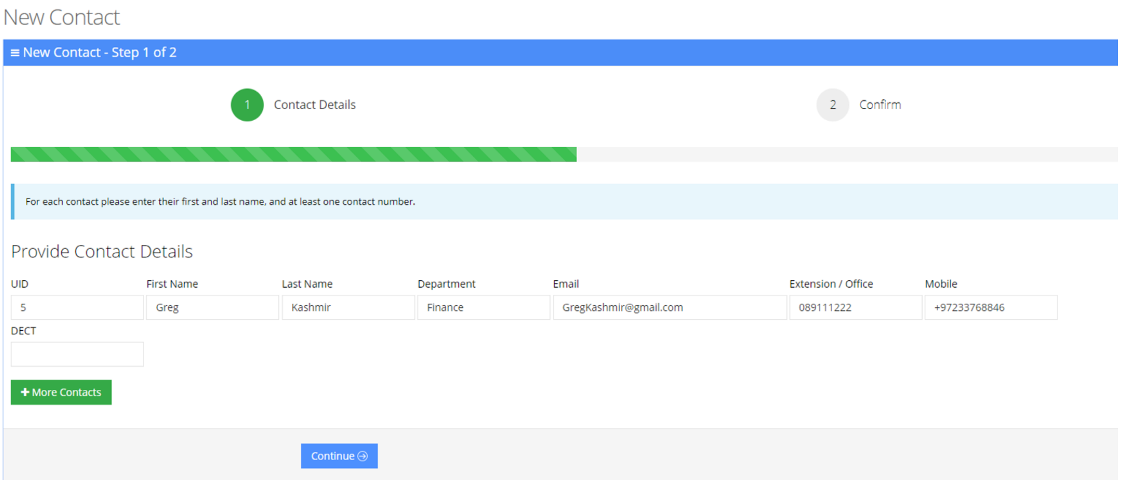
The following describes how to add a contact.

➢ **To add a contact:**

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



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



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:

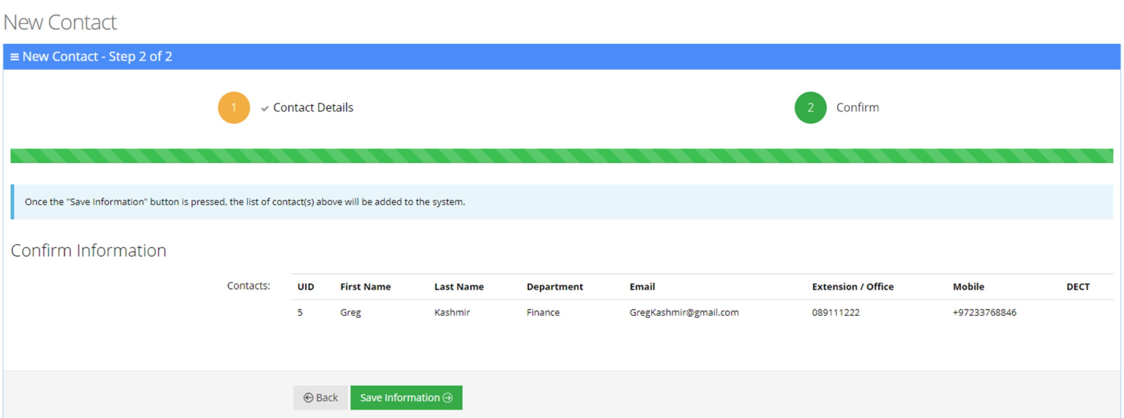


Figure 3-1:

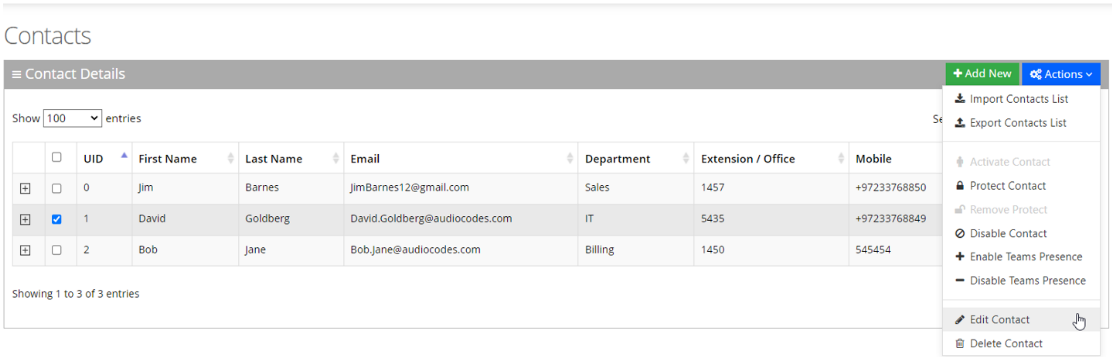
5. Click **Save Information**.

Editing a Contact

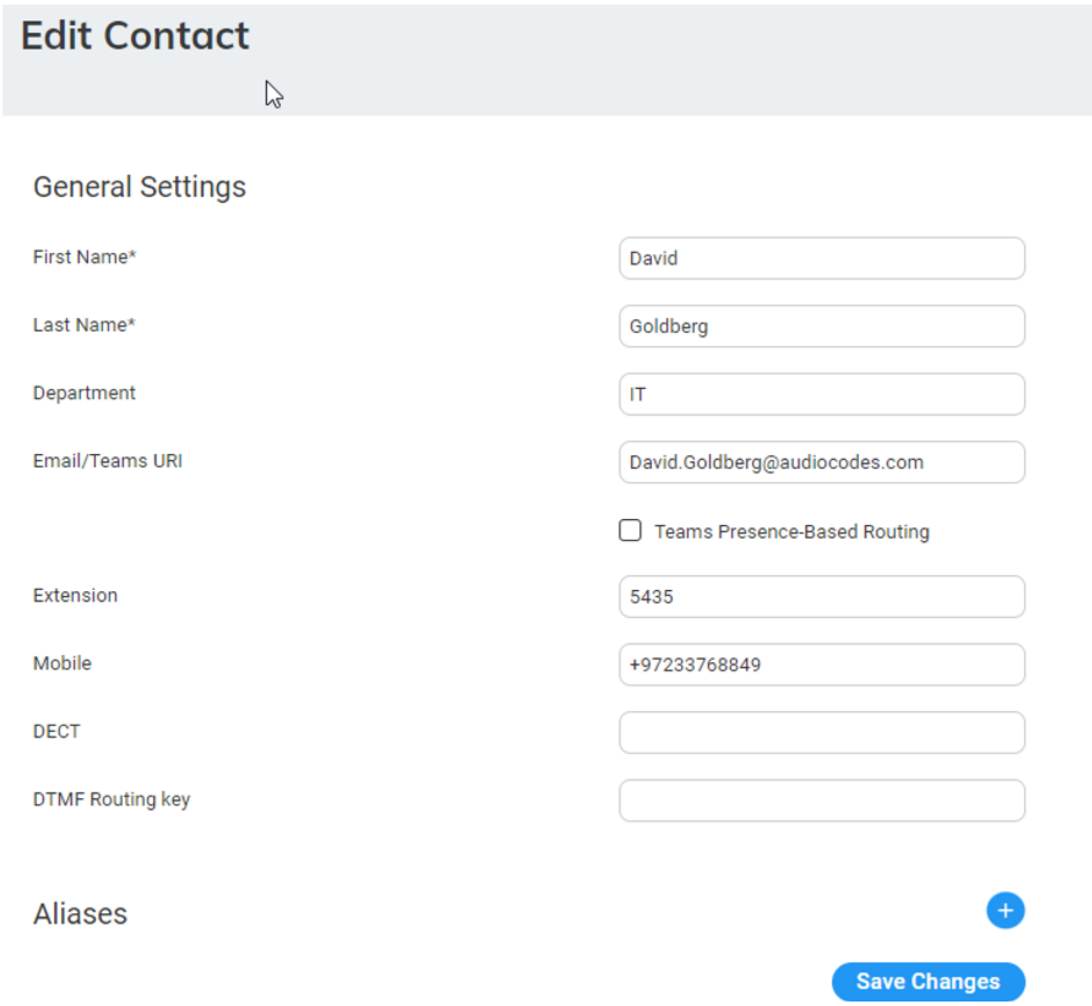
The procedure below describes how to edit a contact.

➢ 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.



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



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.

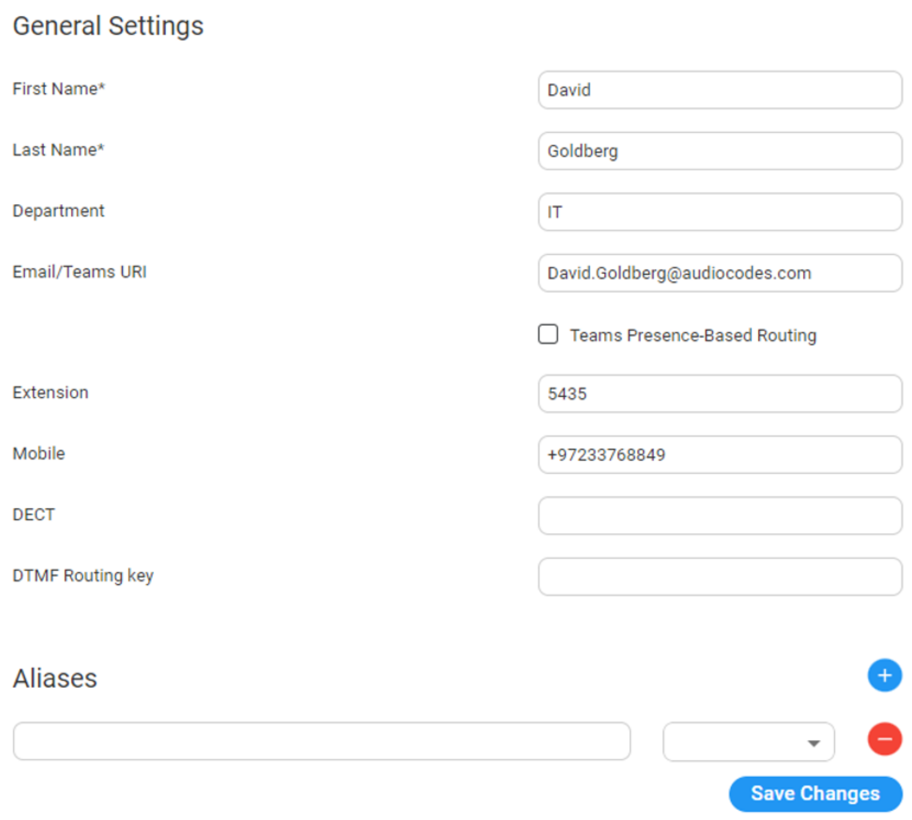
The alias for the contact can be configured for:

- **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.

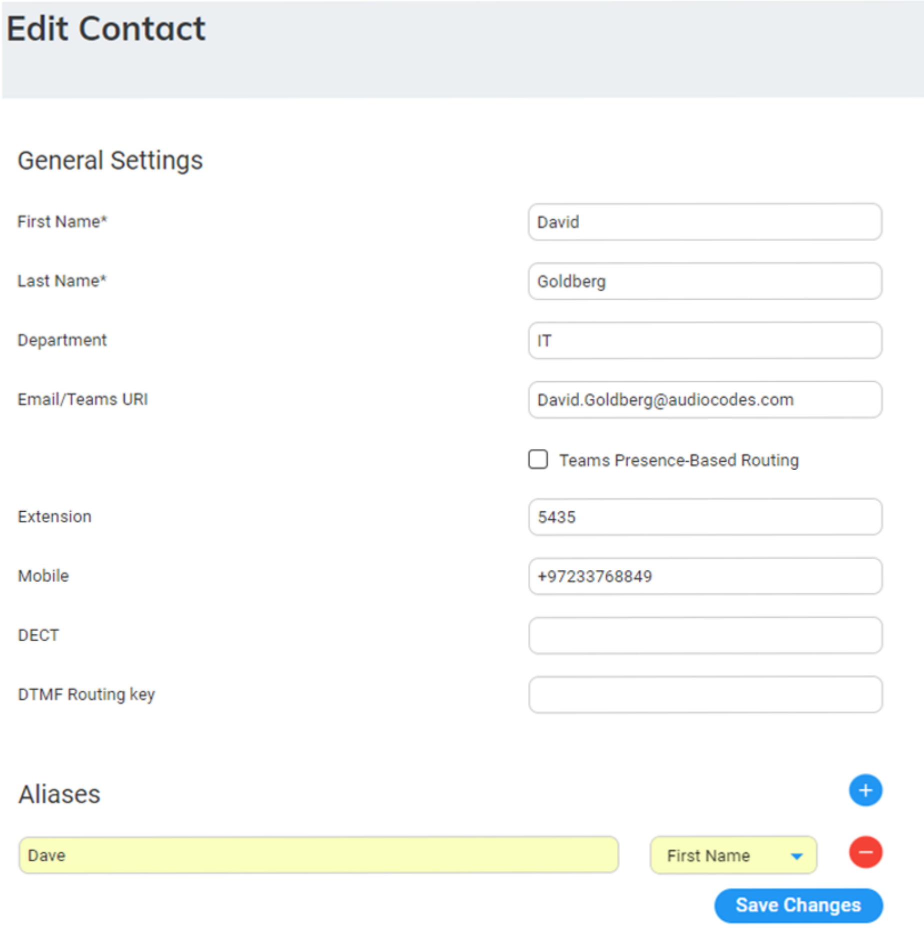
Depending on the configured option, the system will search for the contact with selected alias.

➢ 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:



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.



7. For more aliases, click the  sign.

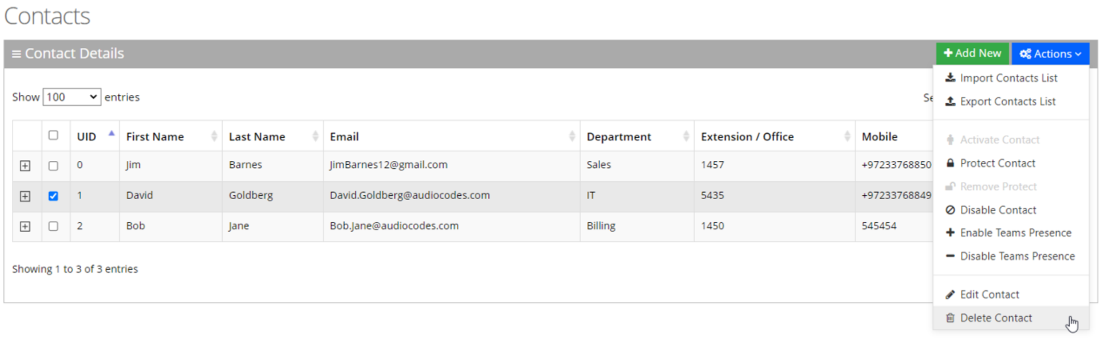
7. Click **Save Changes**.

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**.



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:

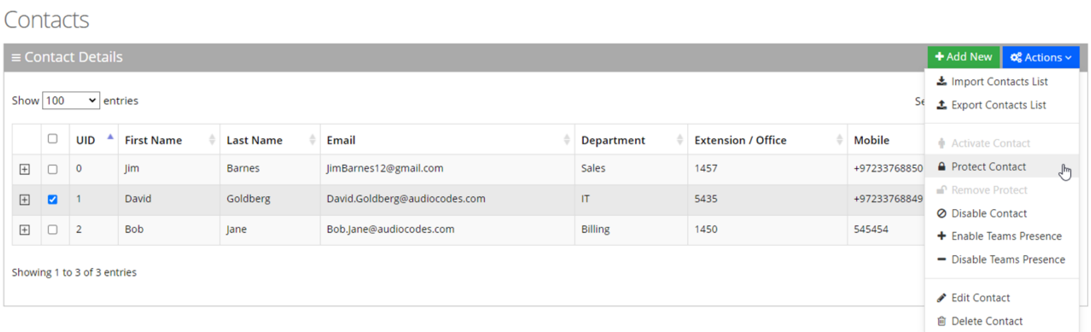
1. Open the Contacts menu (**Contacts** > <department Dictionary name>).
2. Click on the **Contact List** menu.
3. Enter the search criteria in the Search field; the searched data is displayed.

Protecting a Contact

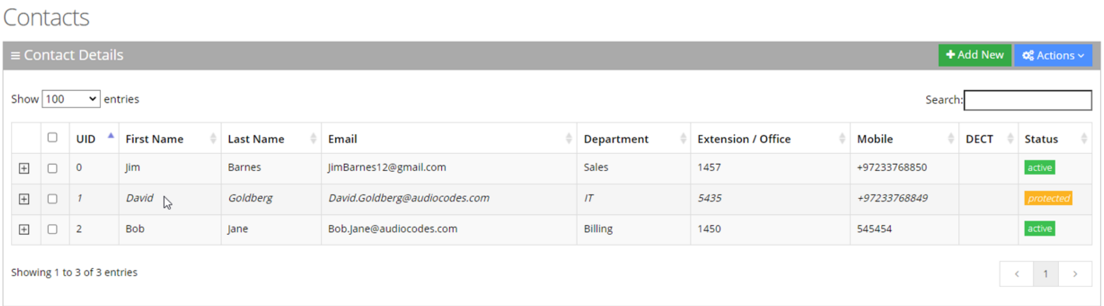
In most cases, the Contacts List is retrieved from an external source (e.g., Active Directory or a CSV file). Organization administrators have the option to change specific contact details and set the contact to Protect mode. By doing this, a re-synchronization of the Contacts List will not override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



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

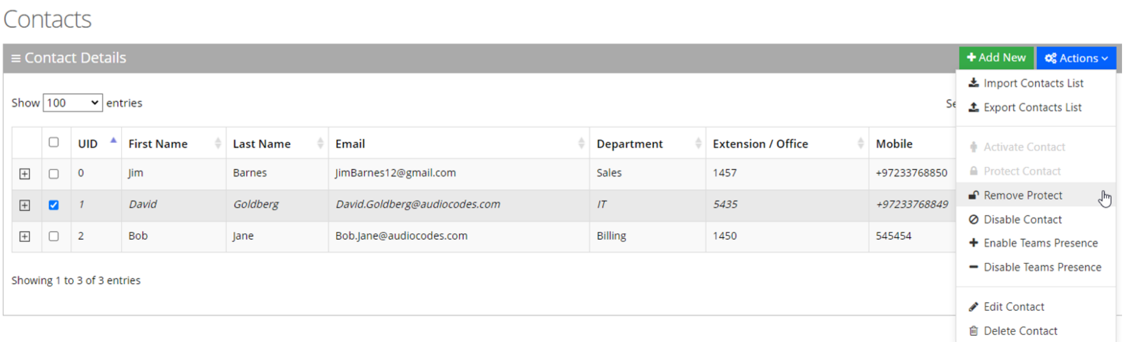


Removing Protection from a Contact

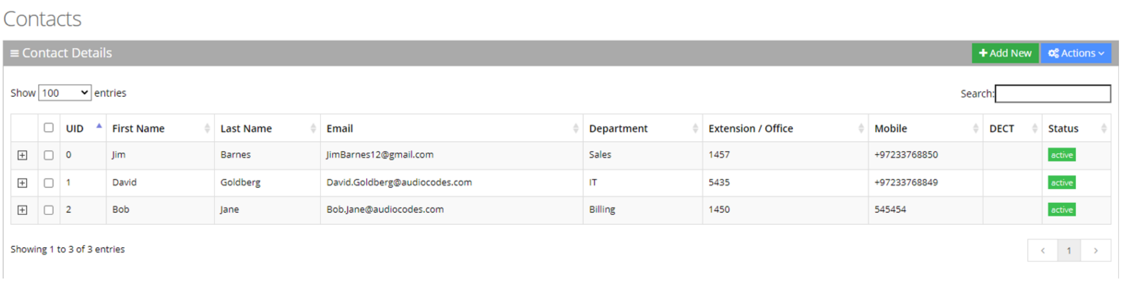
The procedure below describes how to remove protection from a contact.

➢ 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:



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



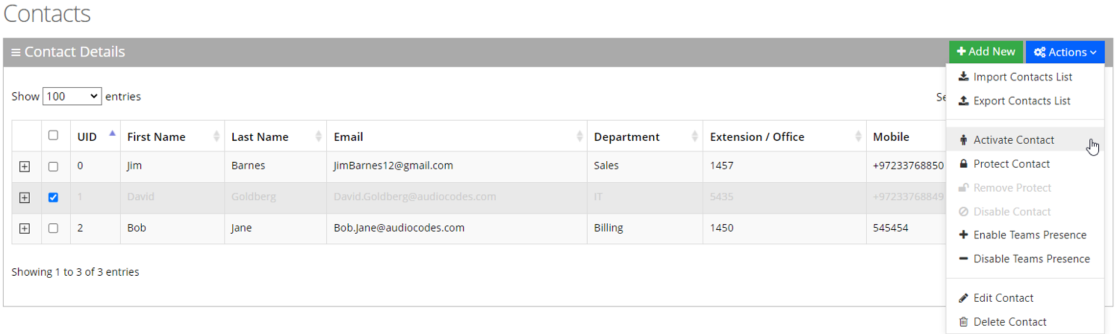
Activating a Contact

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.

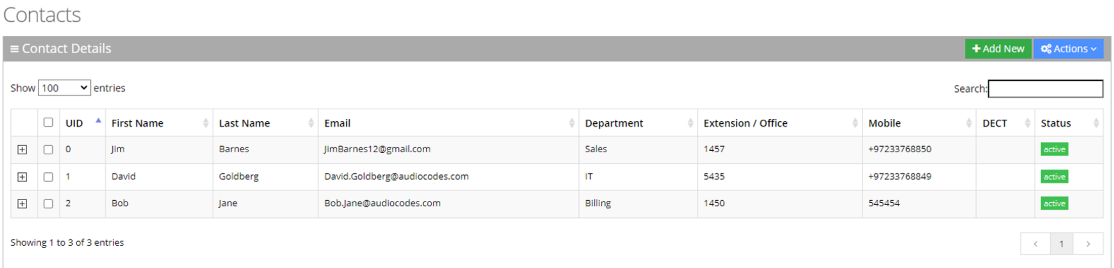
➢ To activate a contact:

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

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



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



Disabling a Contact

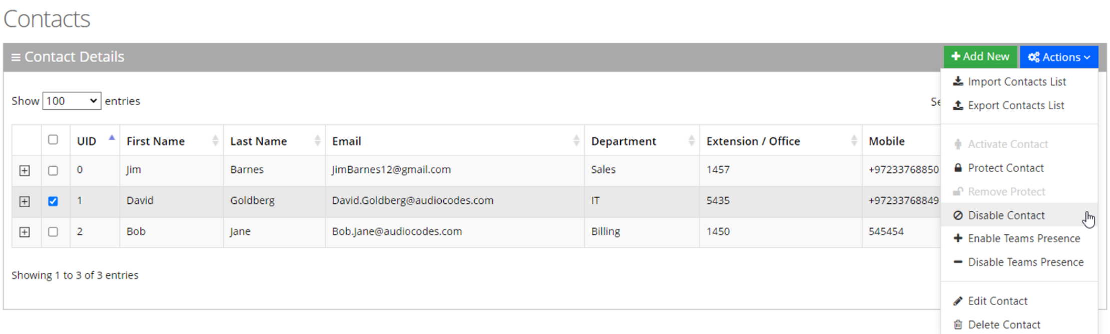
When you disable a contact, the system removes the contact from the Contact Detection List.

When a "disabled" contact calls the system, it will be recognized as non-employee caller.

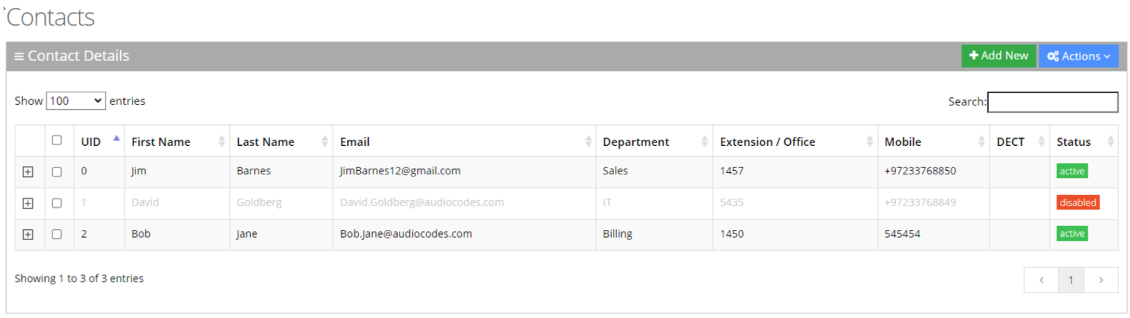
The procedure below describes how to disable a contact.

➢ 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:

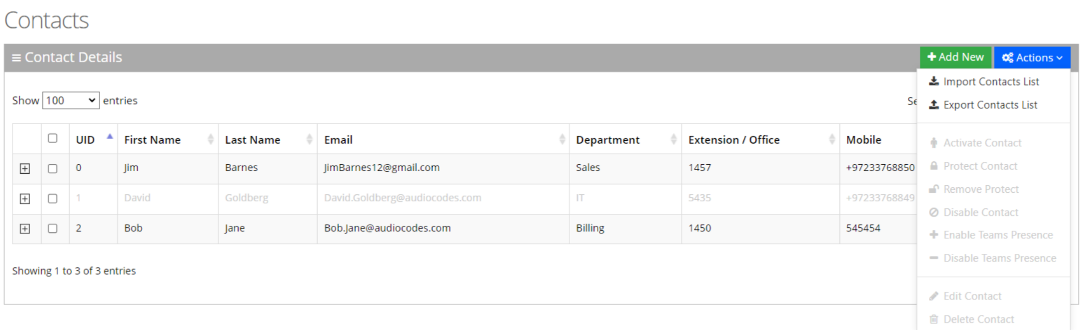


4. The status is set to "disabled" as shown in the figure below:



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.

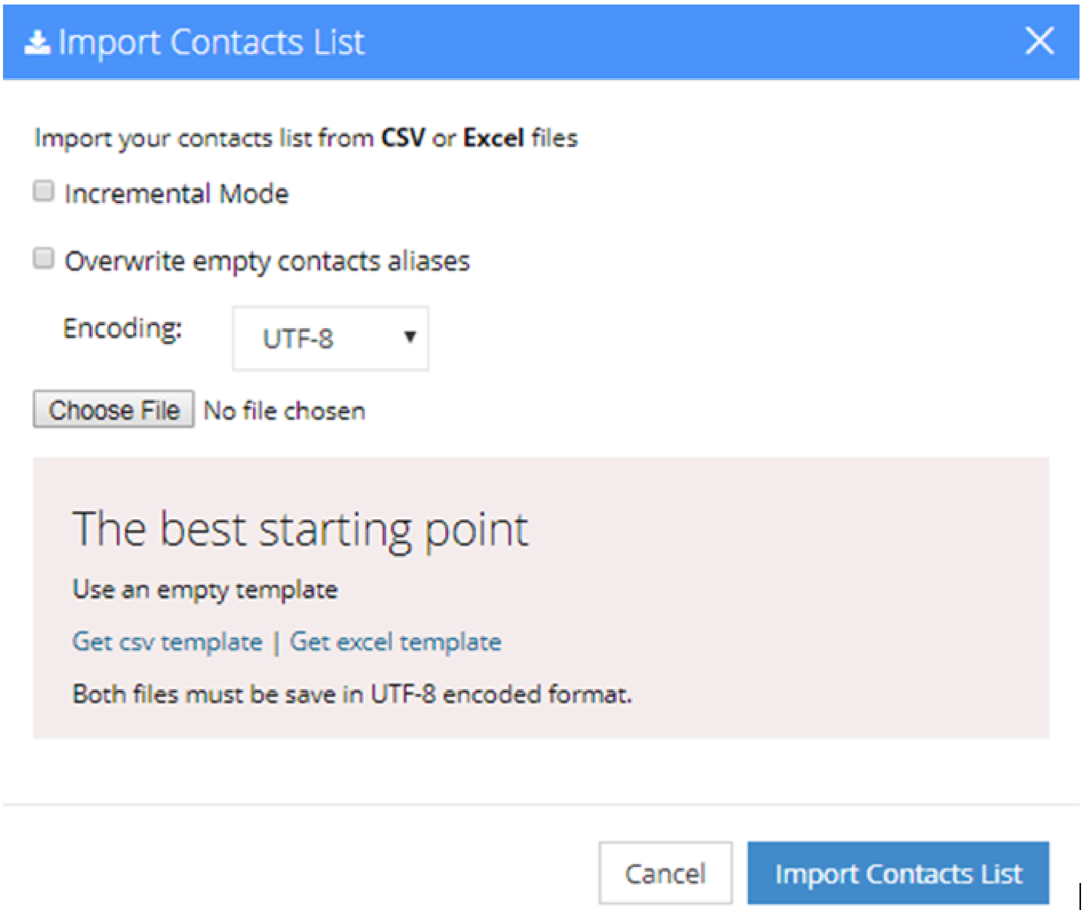


Importing Contact Information

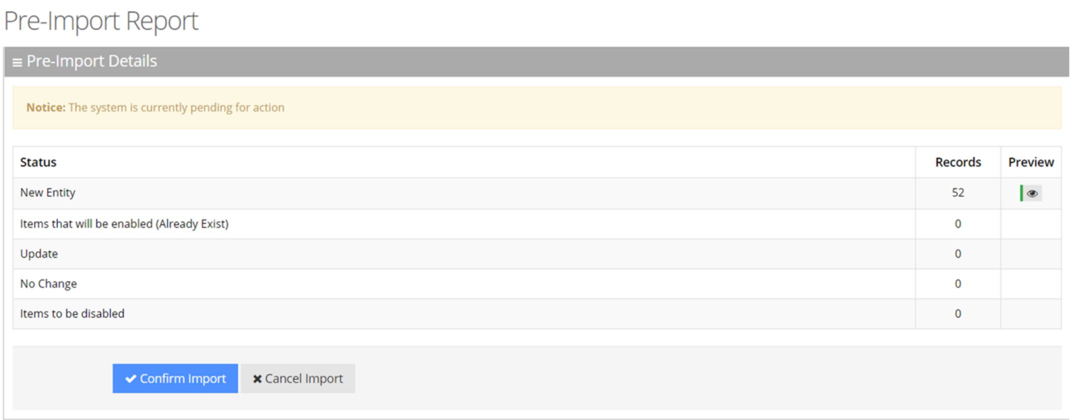
The procedure below describes how to import Contact information.

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

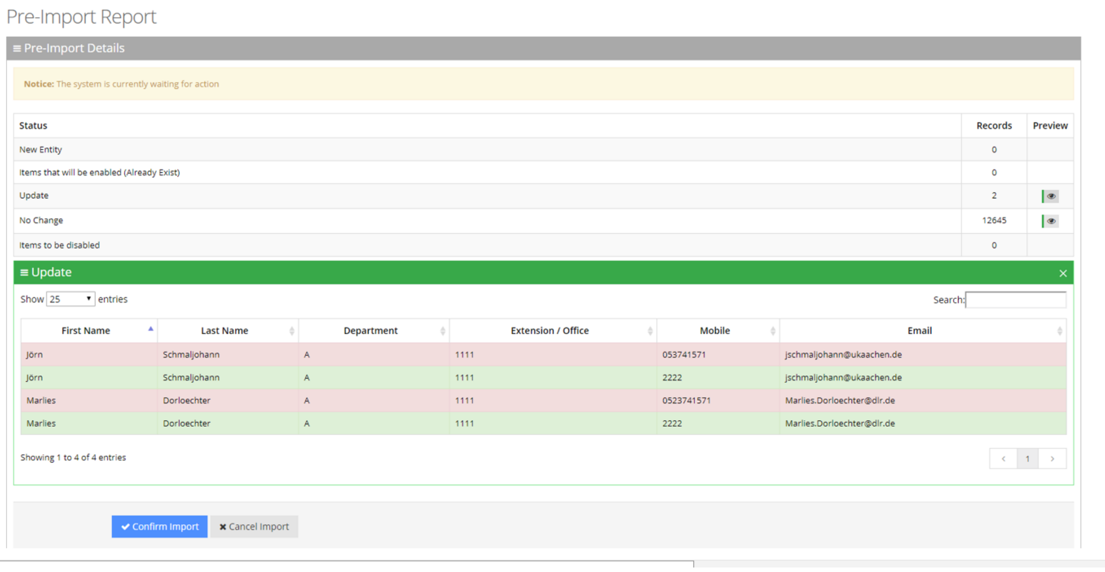
1. From the Actions drop-down list, on the Contact Details screen, click **Import Contacts List**.



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.



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.

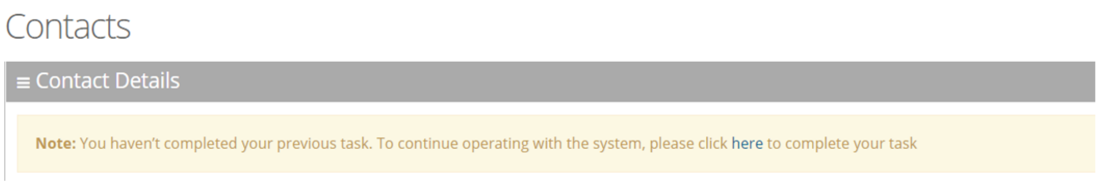


9. Click **Confirm Import** to import the contacts. If you wish to cancel the import process, click **Cancel Import**.

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.



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.

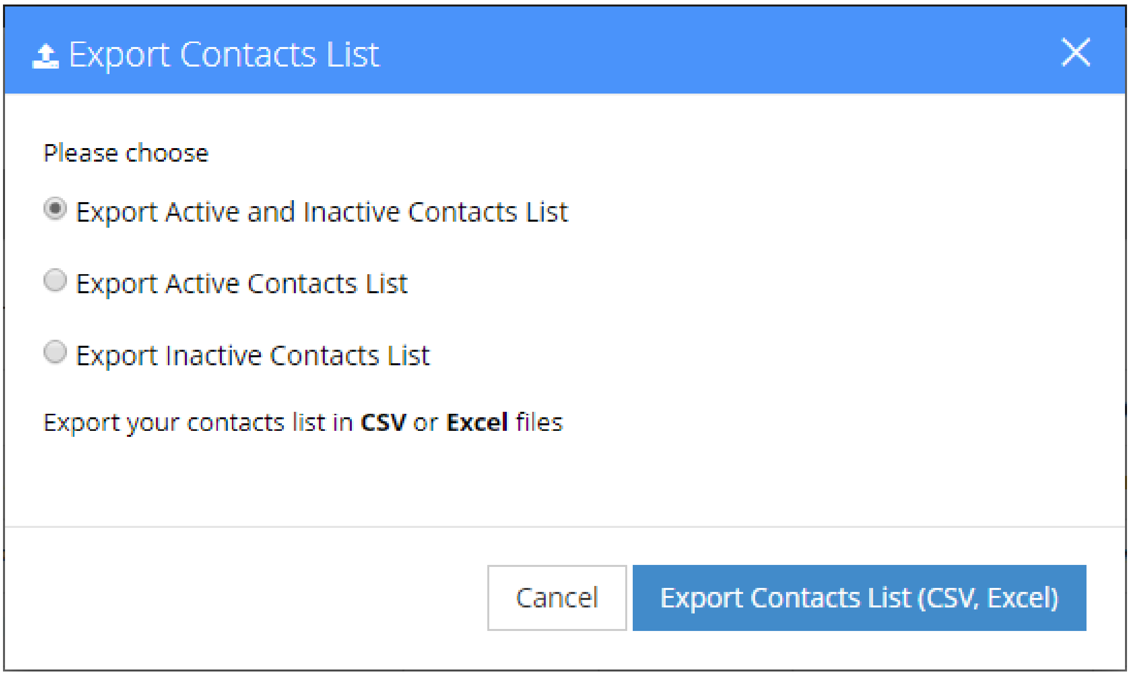
	A	B	C	D	E	F	G	H	I	J
1	UniqueID	FirstName	LastName	Extension	Mobile	Department	Email	FirstName	LastNameAliases	FullNameAliases
2										
3										
4										
5										

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**.



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

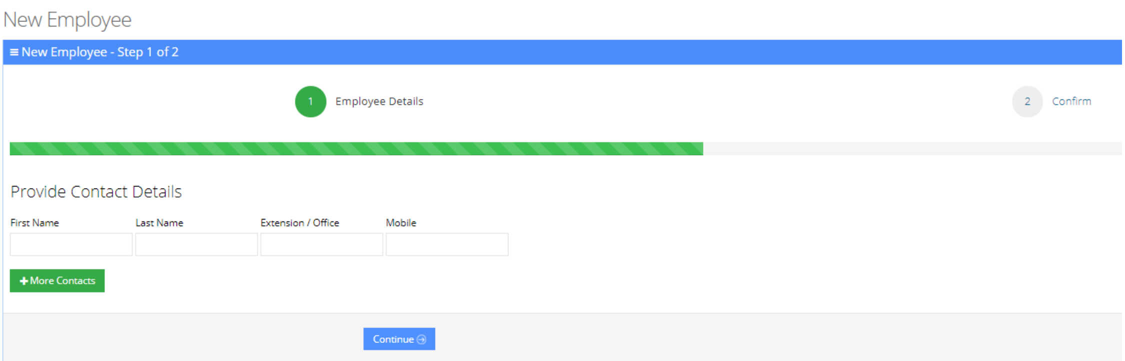
Defining Additional Employees

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

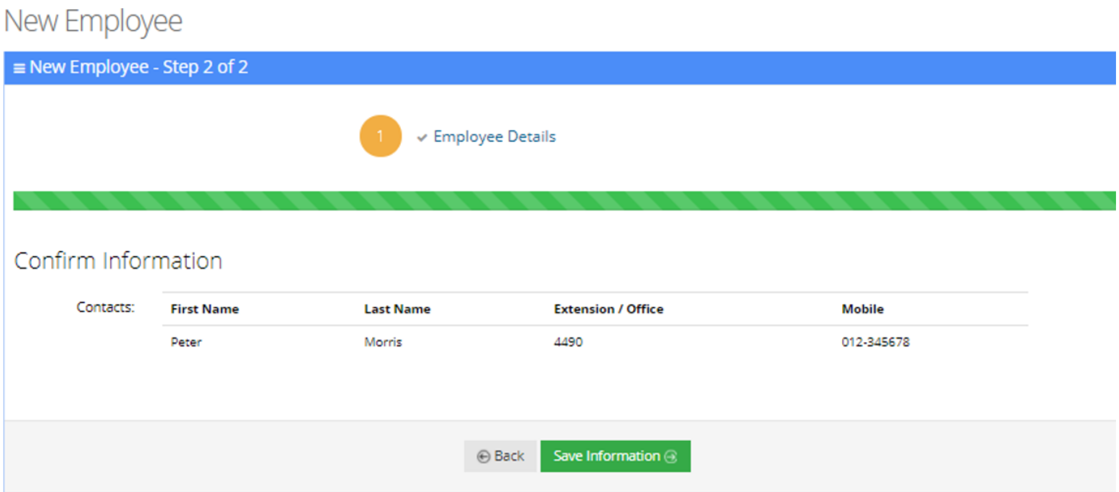
Configuring additional employees allows the organization Administrator to add more contacts which will not be included in the organization's contact list. These additional employees will not be reached through voice dialing, but will be part of the organization and will be provided with employee privileges (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:



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



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.

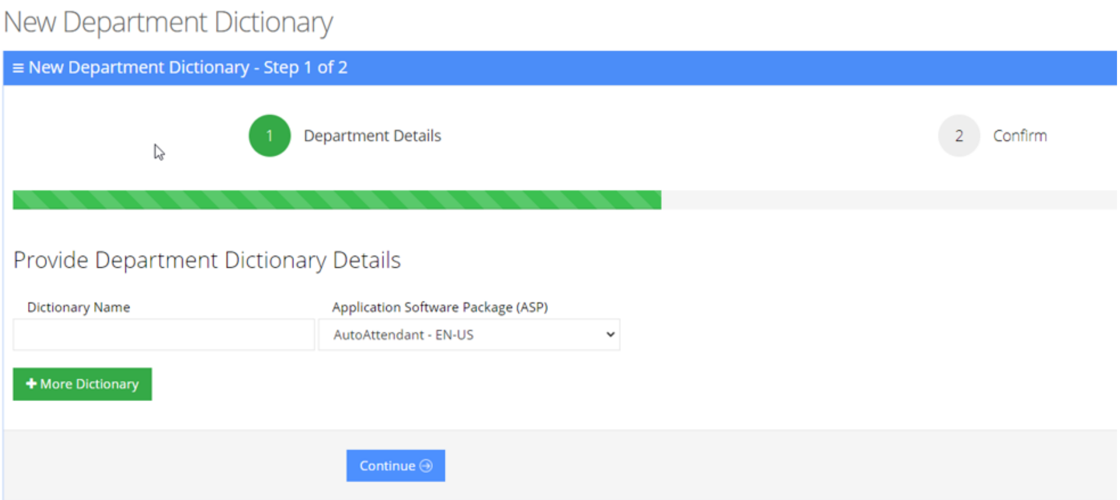
For every tenant/service the "Default" Dictionary List is pre-defined and can't be deleted. It can be used for creating your list or alternatively you can create a new department list with your required name.

Adding Department Dictionary

The procedure below describes how to add a department dictionary.

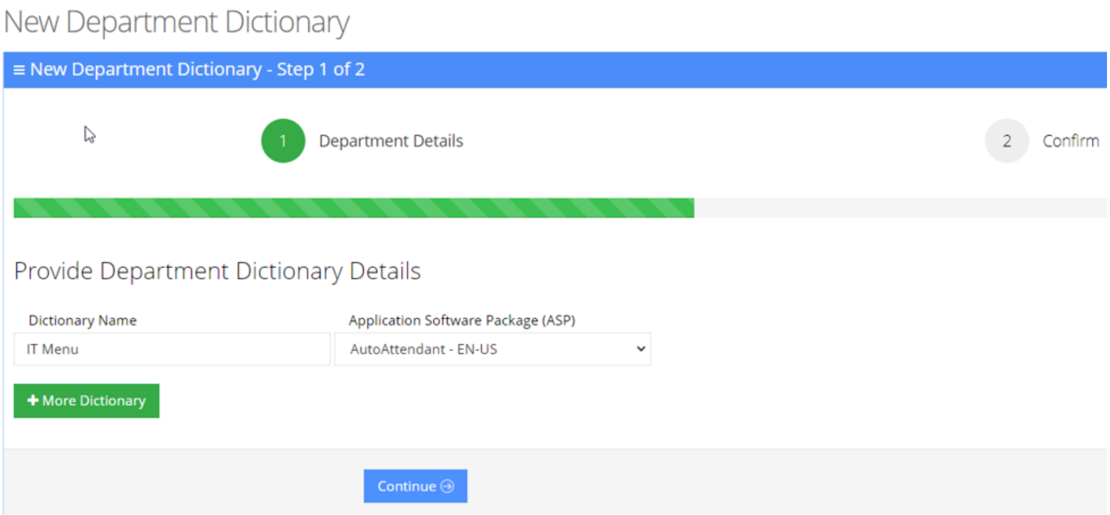
➢ **To add a department dictionary:**

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



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

4. Enter the required fields.



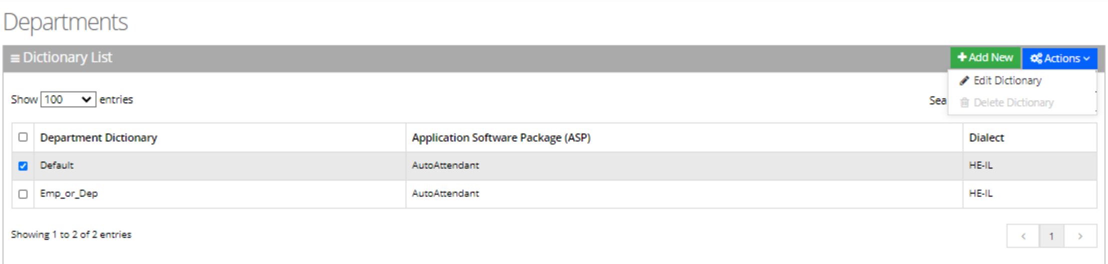
5. Click **Continue**.
6. Click **Save Information**.

Editing Department Dictionary

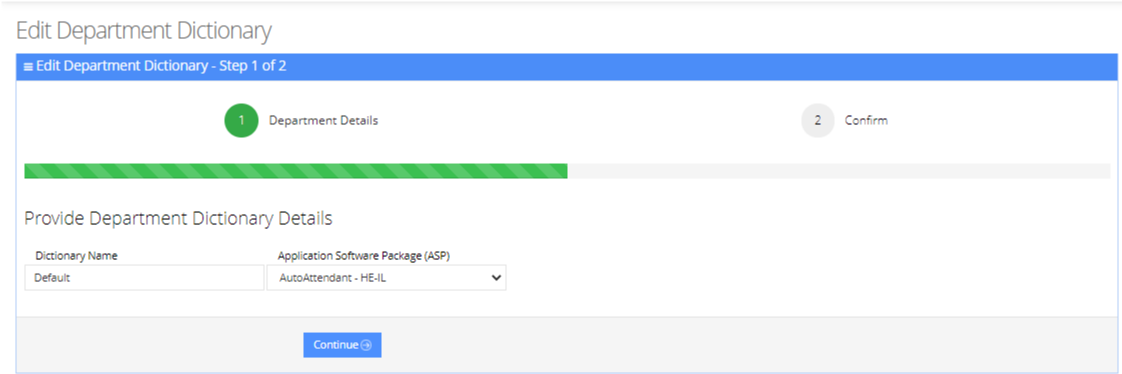
The procedure below describes how to edit a Department dictionary.

➢ 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**.



4. Edit the required fields.



5. Click **Continue**.

6. Click **Save Information**.

Deleting Department Dictionary

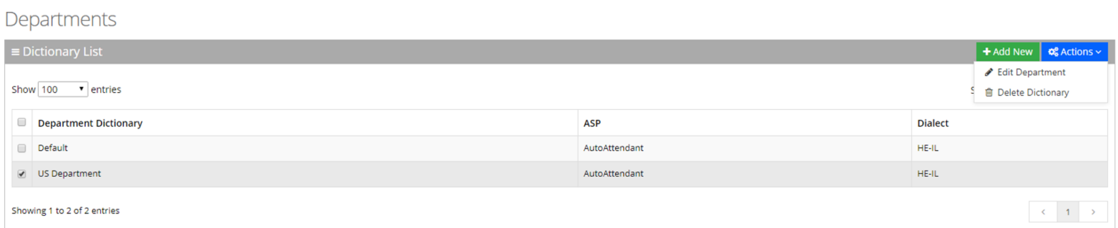
The procedure below describes how to delete a department Dictionary.

➢ **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**.



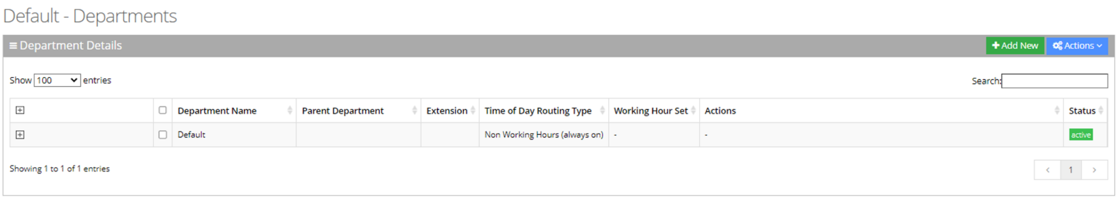
Adding a Department Manually

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

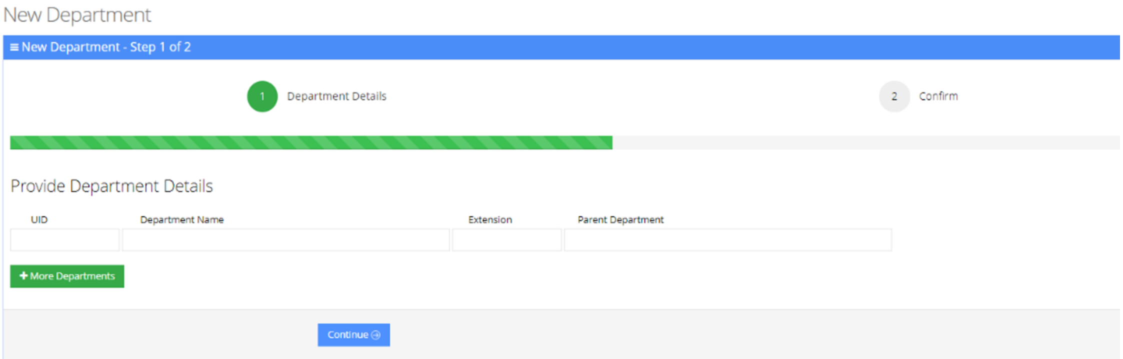
➢ **To add a department manually:**

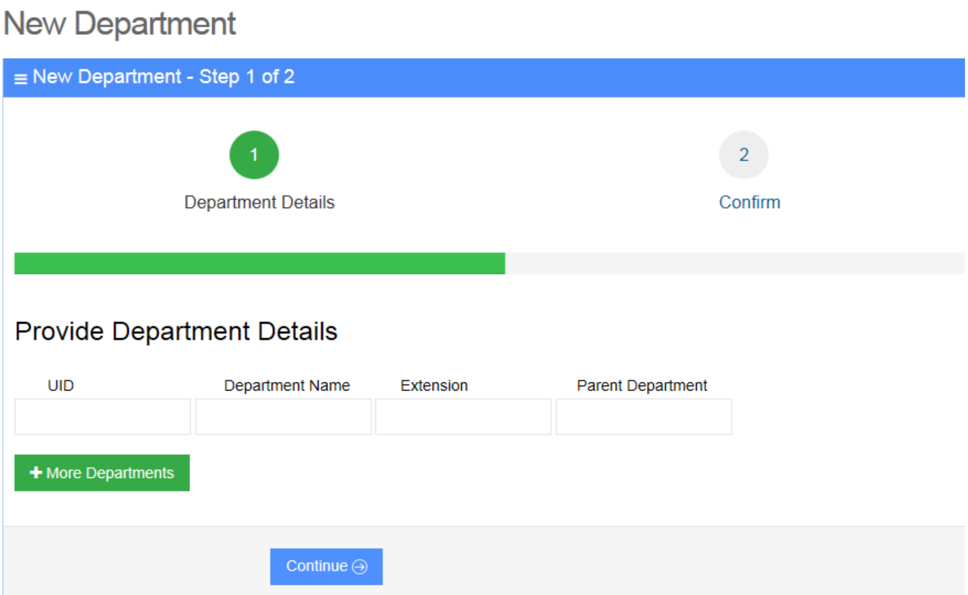
1. Open the Departments menu, and then click on the required department Dictionary (**Departments** > **Departments > {department Dictionary name}**).

2. Click on the **Department List** menu.

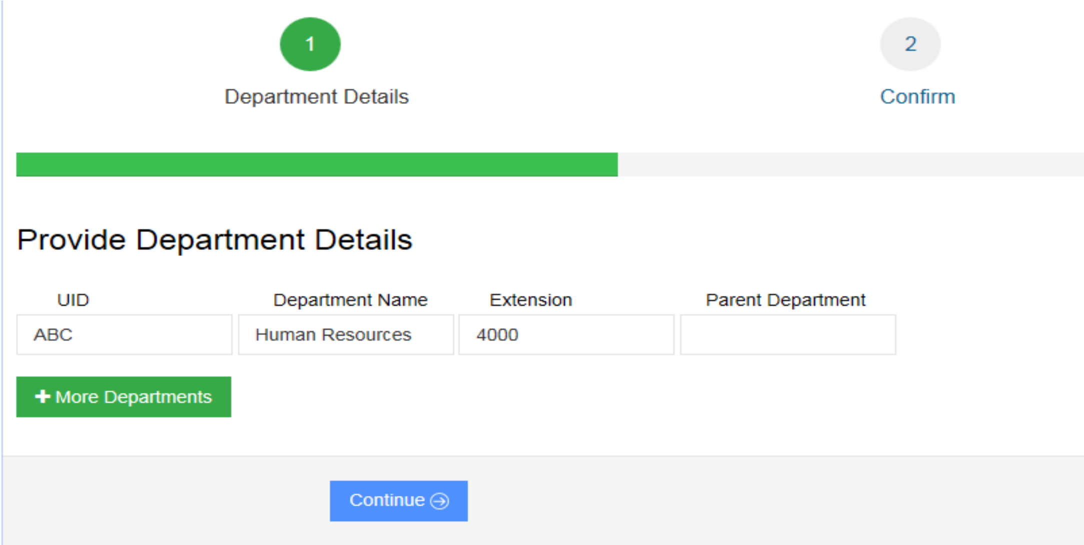


3. Click **Add New;** the following appears:





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



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

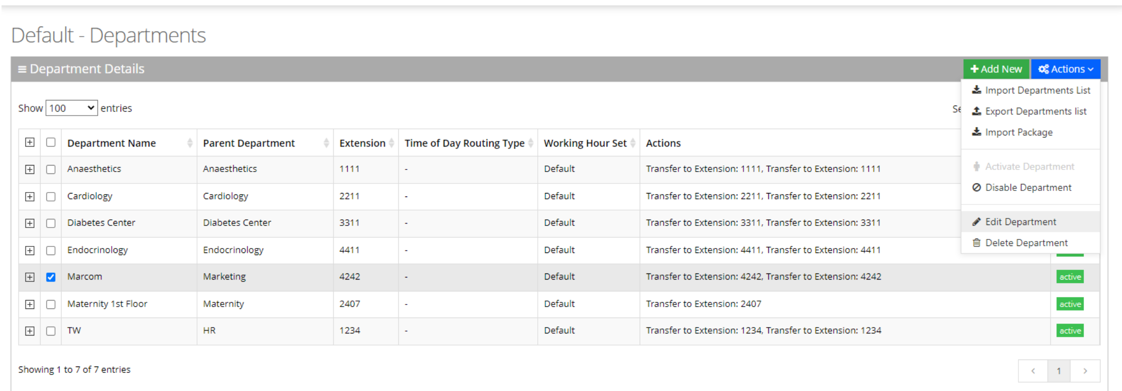
The procedure below describes how to edit a department.

➢ To edit a department:

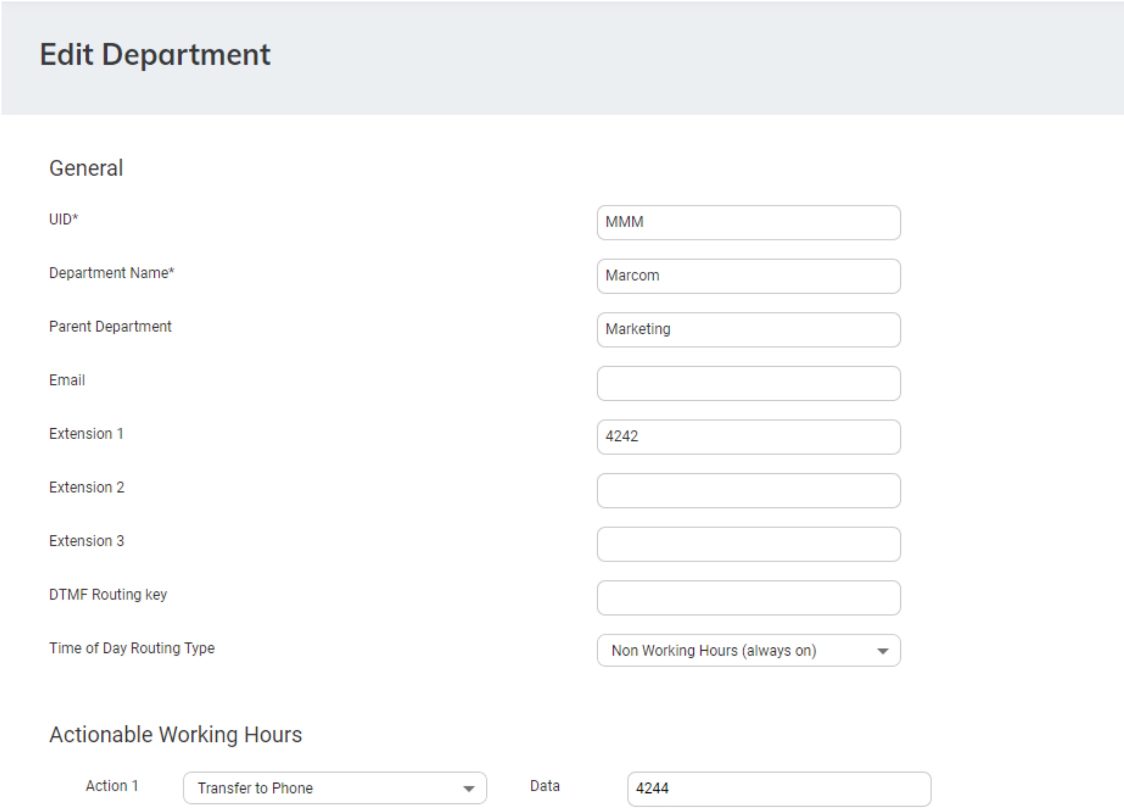
1. Open the **Departments** menu, and then click on the required department (**Departments** > **{Department Dictionary Name}**).

2. Click on the **Department List** menu.

3. Select the department you wish to edit by selecting the **Department** check box.



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



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.

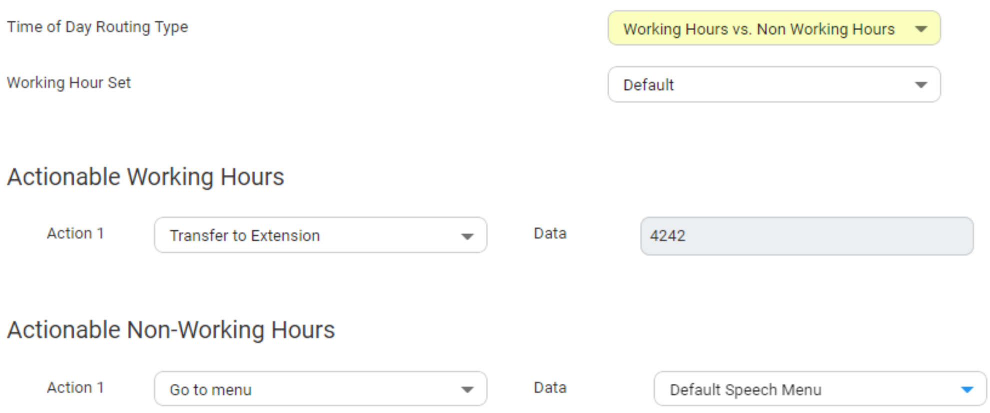
7. In the 'Extension 1/2/3' fields, enter the extension numbers for the department. These extensions might be used if Call Hunting is activated for departments in the Speech menu.

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.

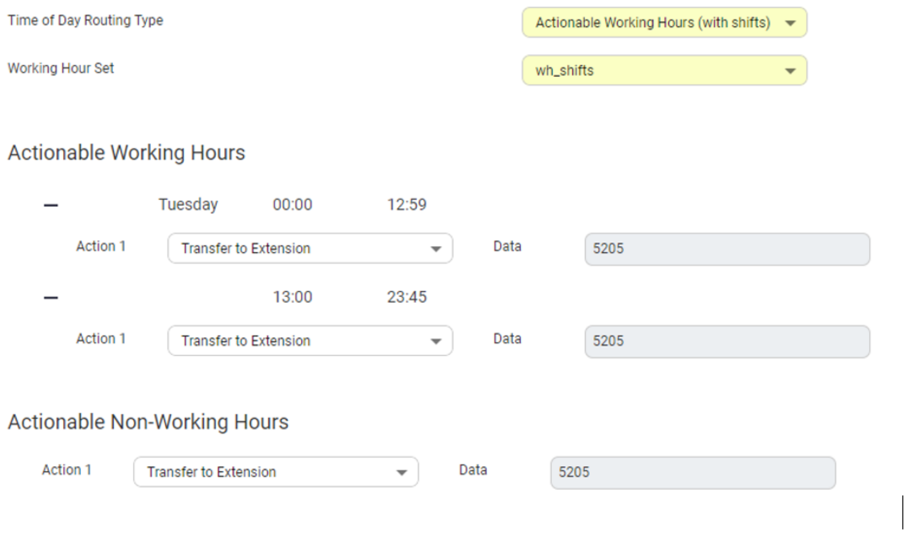
9. The 'Time Of Day Routing Type' drop-down list determines how to handle the incoming call based on working hours. There are three possible options:

   - 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.

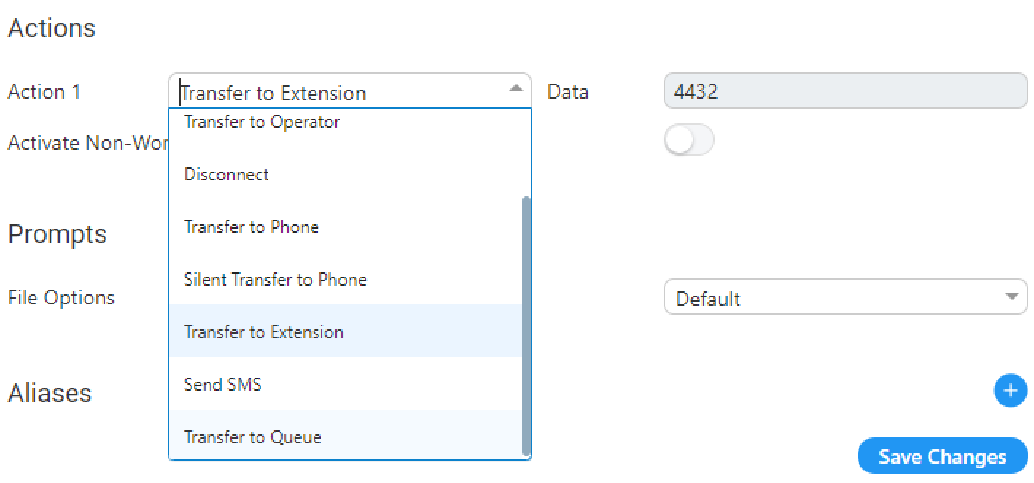


- If you select **Actionable Working Hours (with shifts)**, calls are handled based on working hours. When selecting this option, a Working Hours Set should be selected. All shifts defined in that set will be displayed and for each working hour shift.



- 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:



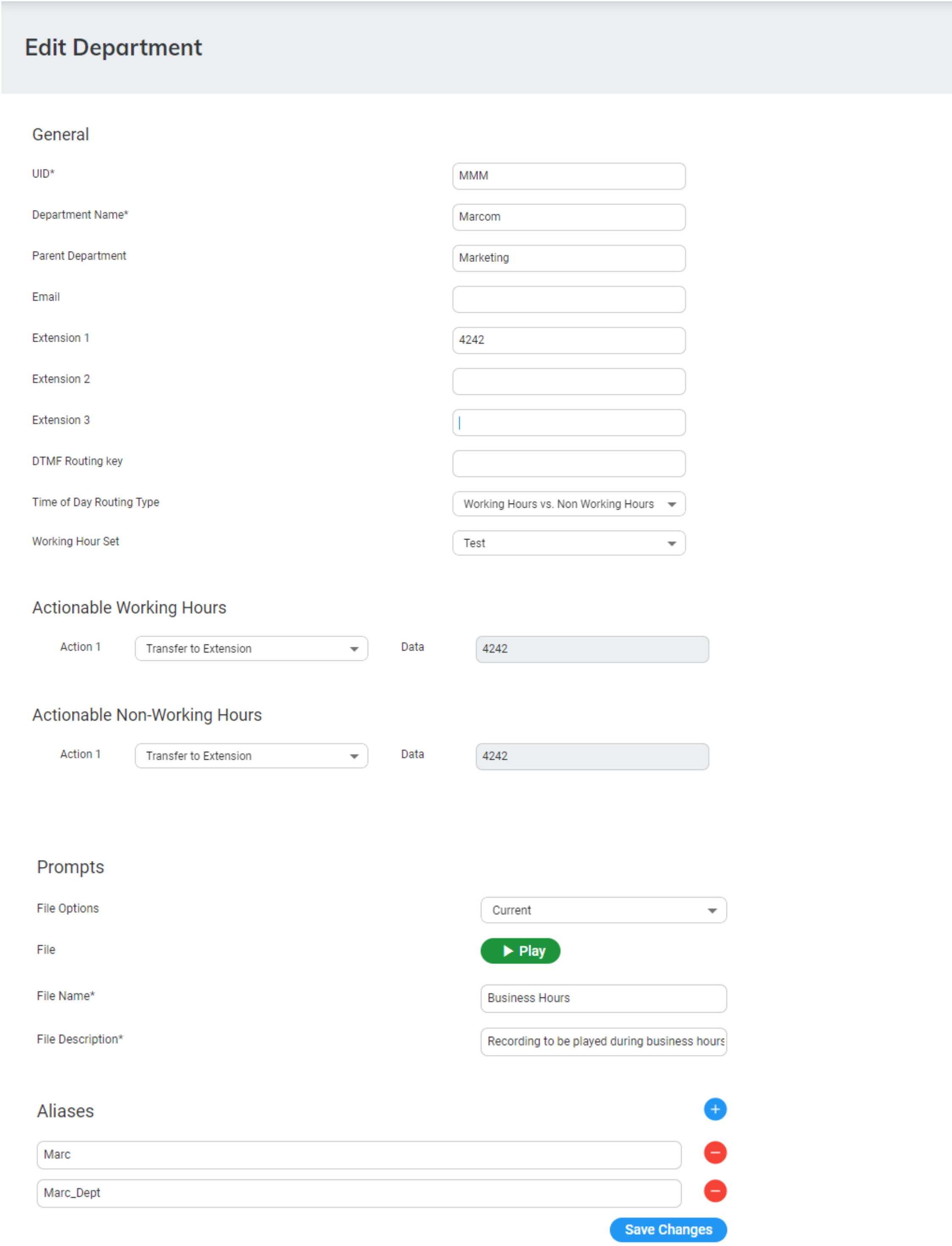
11. In the 'Action1 Data' field, enter the related action data for the 'Action 1' field. For more information of the possible Actions, see Actions.
12. Make your changes, and then click **Save Changes**.

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:**

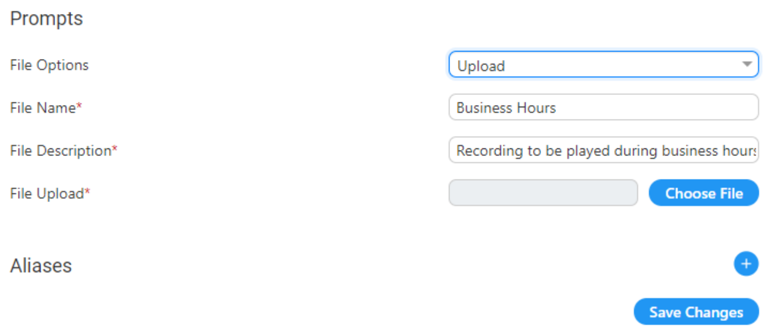
1. Open the Department menu and click on the required department (**Departments** > **{department Dictionary name}**).
2. Click on the **Department List** menu.
3. Select the department you wish to edit by selecting the **Department** check box.
4. From the 'Actions' drop-down list, select **Edit Department**;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



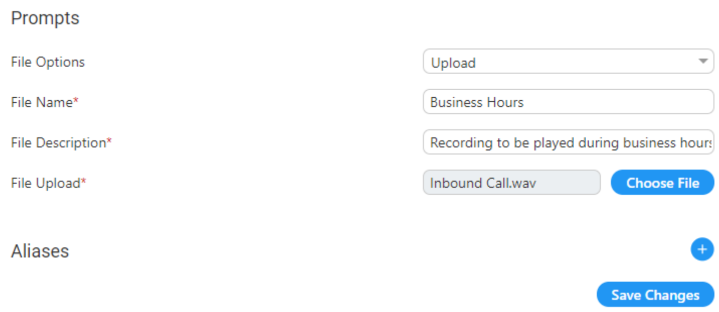
5. Under the **Prompts** group, select 'default' to use a pre-existing prompt.

➢ To upload a prompt:

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



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

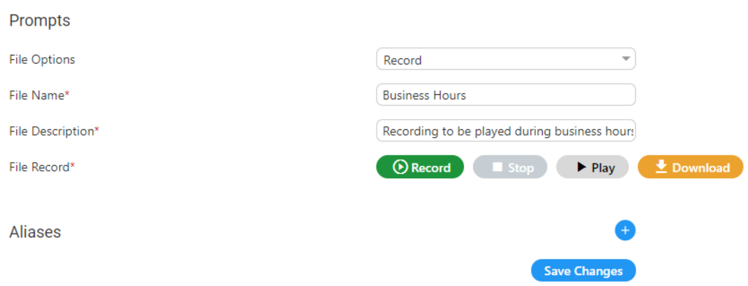


5. Click **Save Changes** to complete the upload process. A 'department Successfully Updated' message appears.

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

➢ To record a prompt:

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



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.

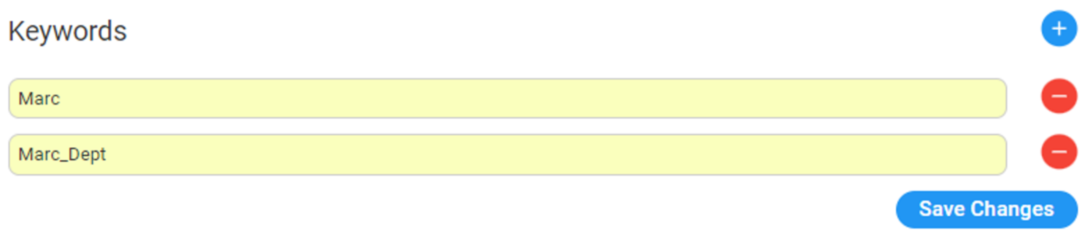
Creating Keywords for a Department

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:

6. Enter the keyword name(s).



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

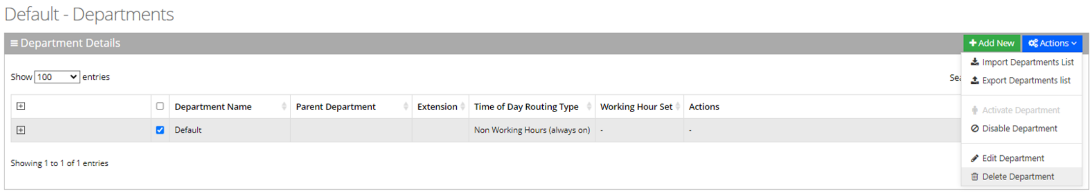
Deleting a Department

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.

4. From the ‘Actions’ drop-down menu, choose **Delete Department**.



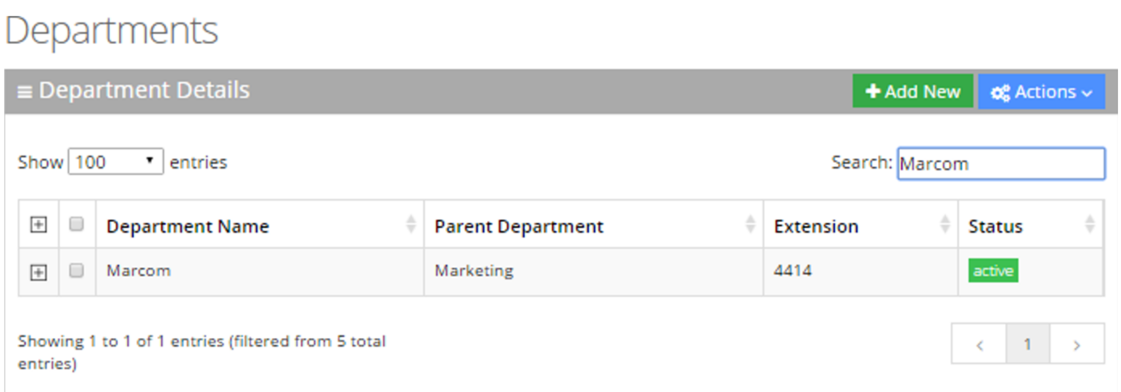
5. The following message appears: 'Are you sure you want to delete the selected department (s)?'
6. Click **OK** to delete the selected department.

Searching a Department

The procedure below describes how to search for a department.

➢ To search for a department:

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



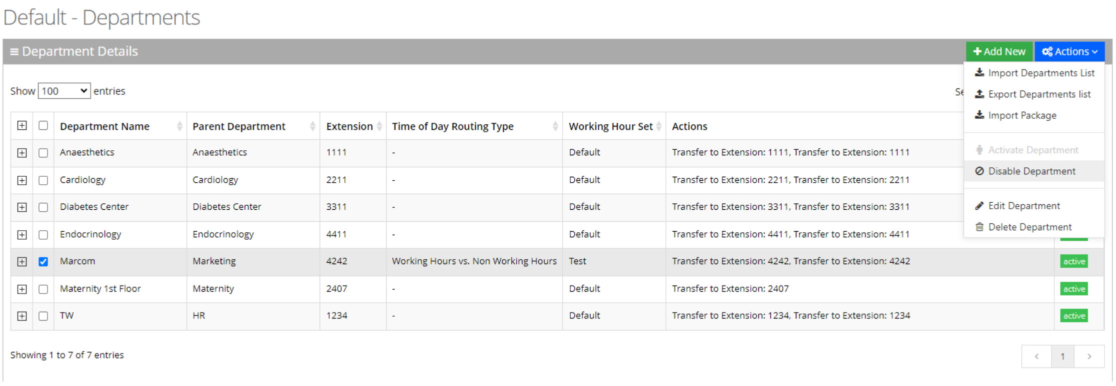
Disabling a Department

The procedure below describes how to disable a department.

➢ To disable a department:

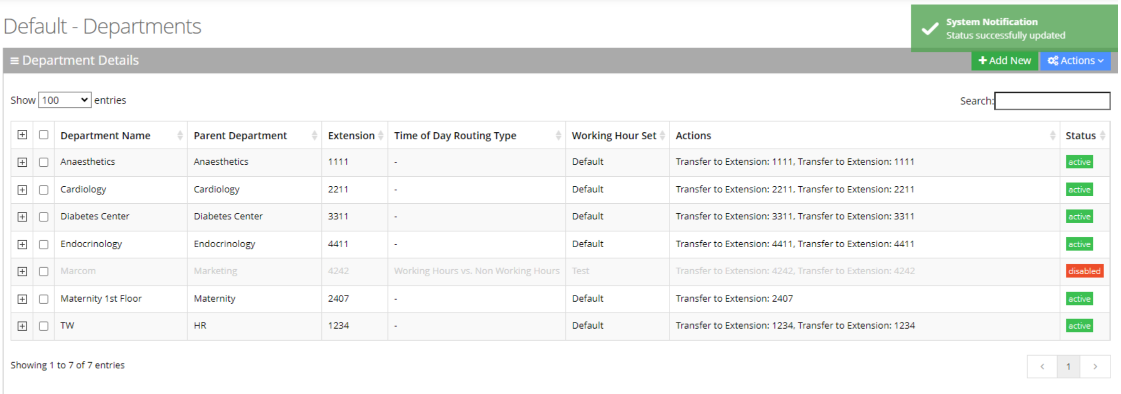
1. Open the **Departments** menu and click on the required department (**Departments** > **{Department Dictionary name}**).
2. Click on the **Department List** menu.
3. Select the department you wish to disable by selecting the **Department** check box.

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



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

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



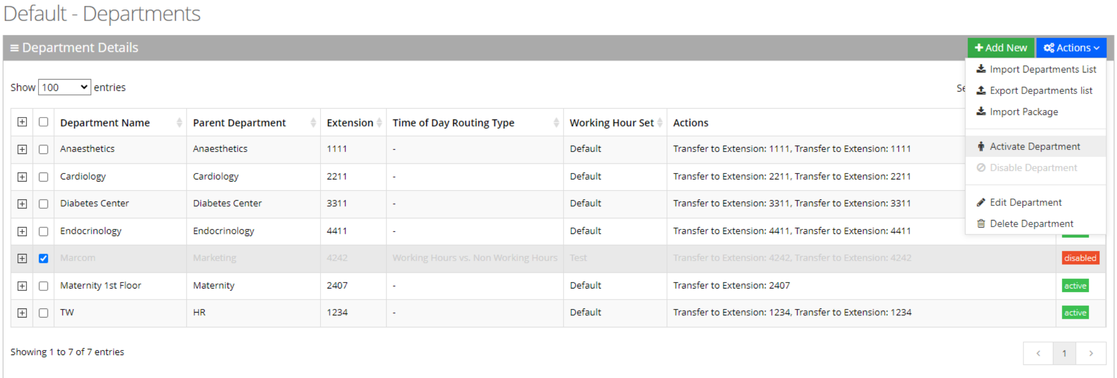
Department Name	Parent Department	Extension	Time of Day Routing Type	Working Hour Set	Actions	Status
Anaesthetics	Anaesthetics	1111	-	Default	Transfer to Extension: 1111, Transfer to Extension: 1111	active
Cardiology	Cardiology	2211	-	Default	Transfer to Extension: 2211, Transfer to Extension: 2211	active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

Activating a Department

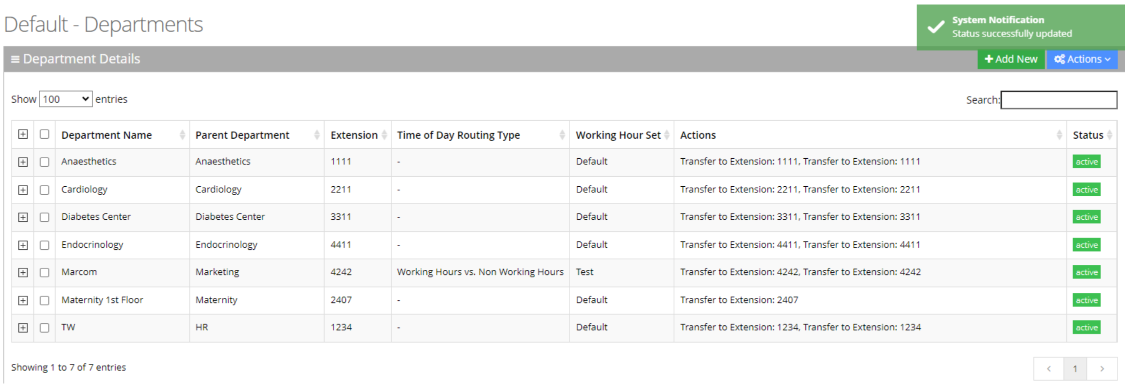
The procedure below describes how to activate a department.

➢ 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**.



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



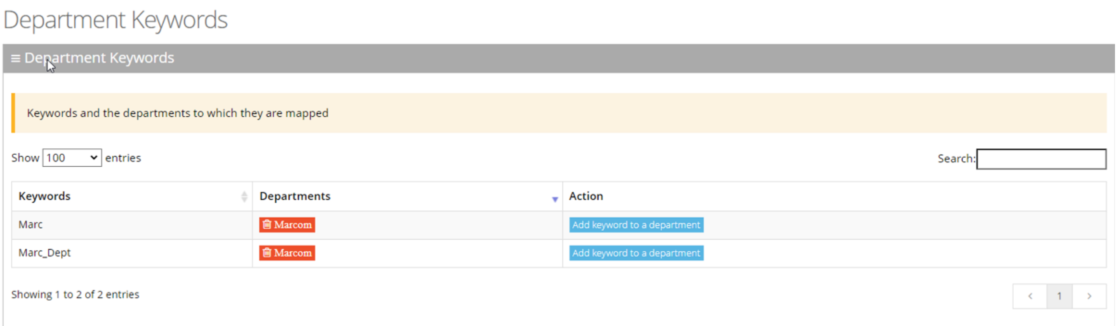
Keyword to Department Mapping

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}**).

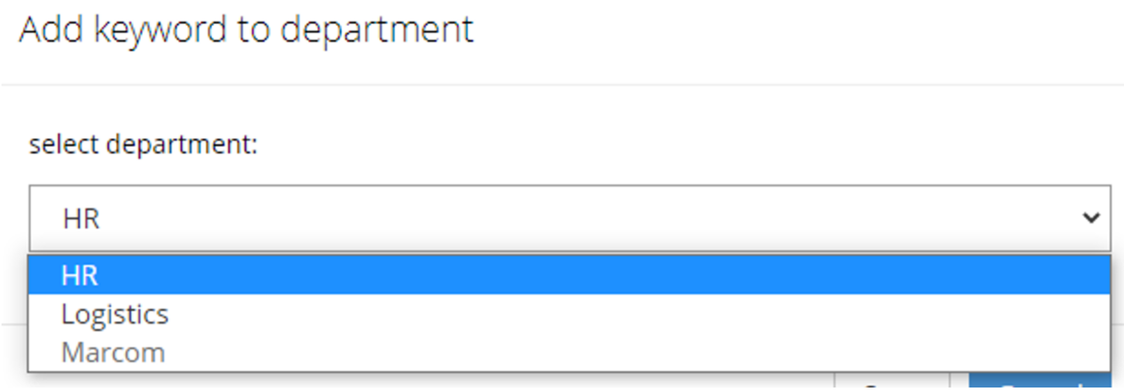
2. Click on the **Department Keywords** menu.



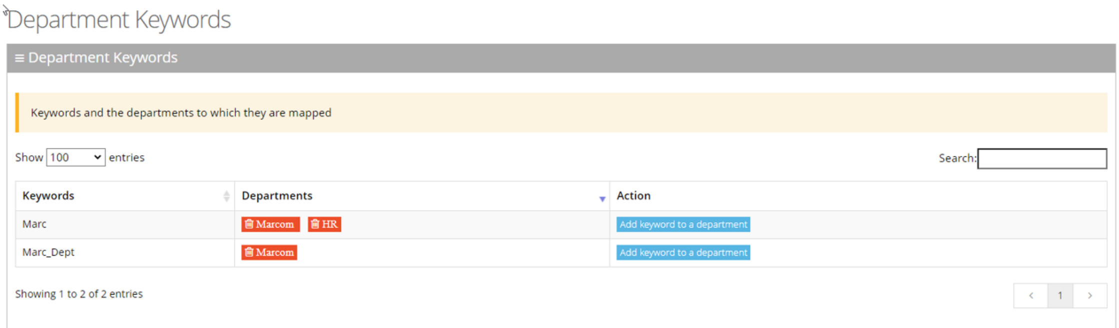
3. Place the cursor on the keywords that you wish to have the department mapped to.

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.

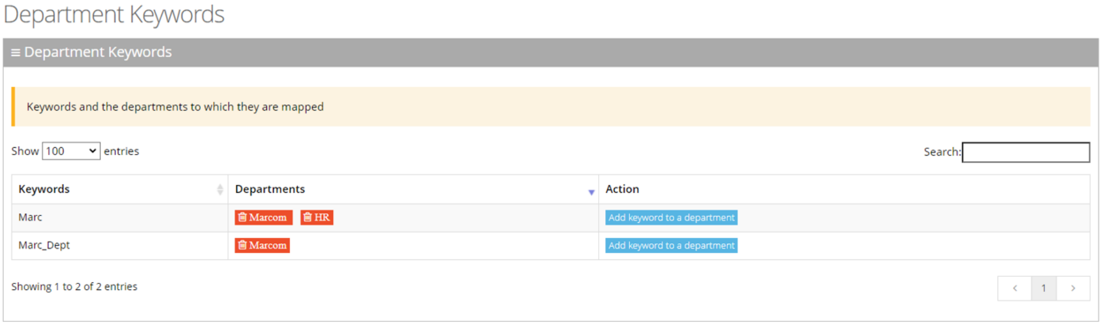


6. Click **Save**; In our example, **HR** was added to the Marc keywords name.



➢ To delete an Alias from a Department:

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

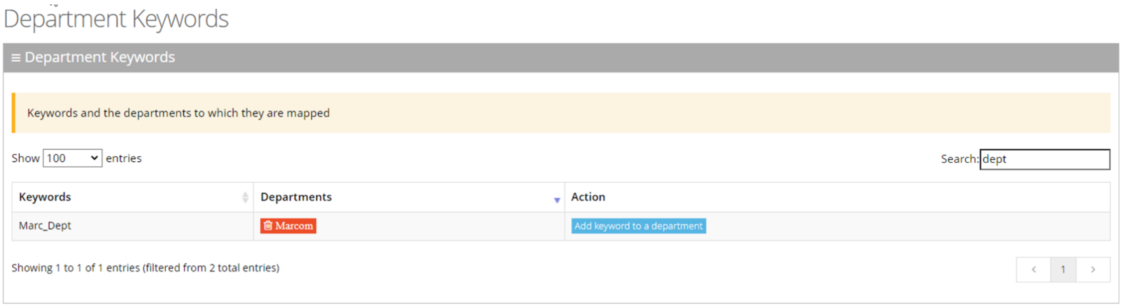


3. Double-click the department button that you want to delete. In our example, we want to delete **Marc** from the **HR** department. A message appears informing you that the alias will be deleted from the department.

4. Click **OK**.

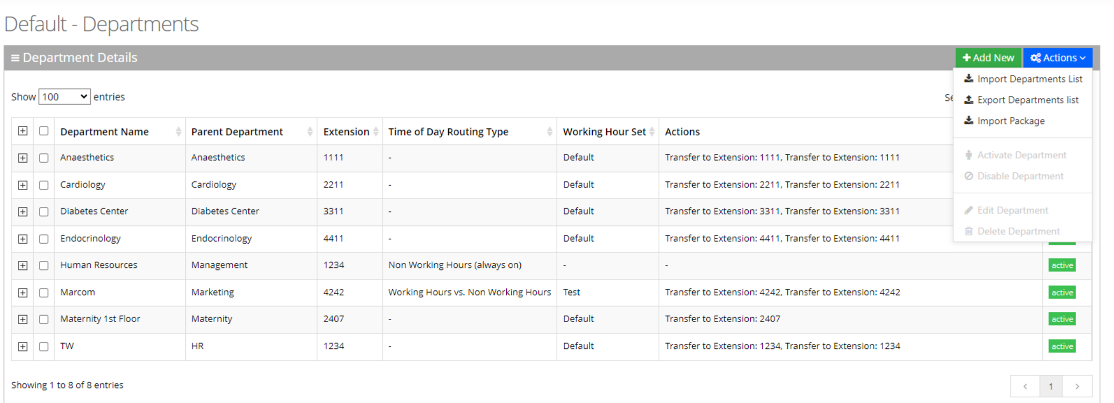
Searching for a Keyword

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



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.

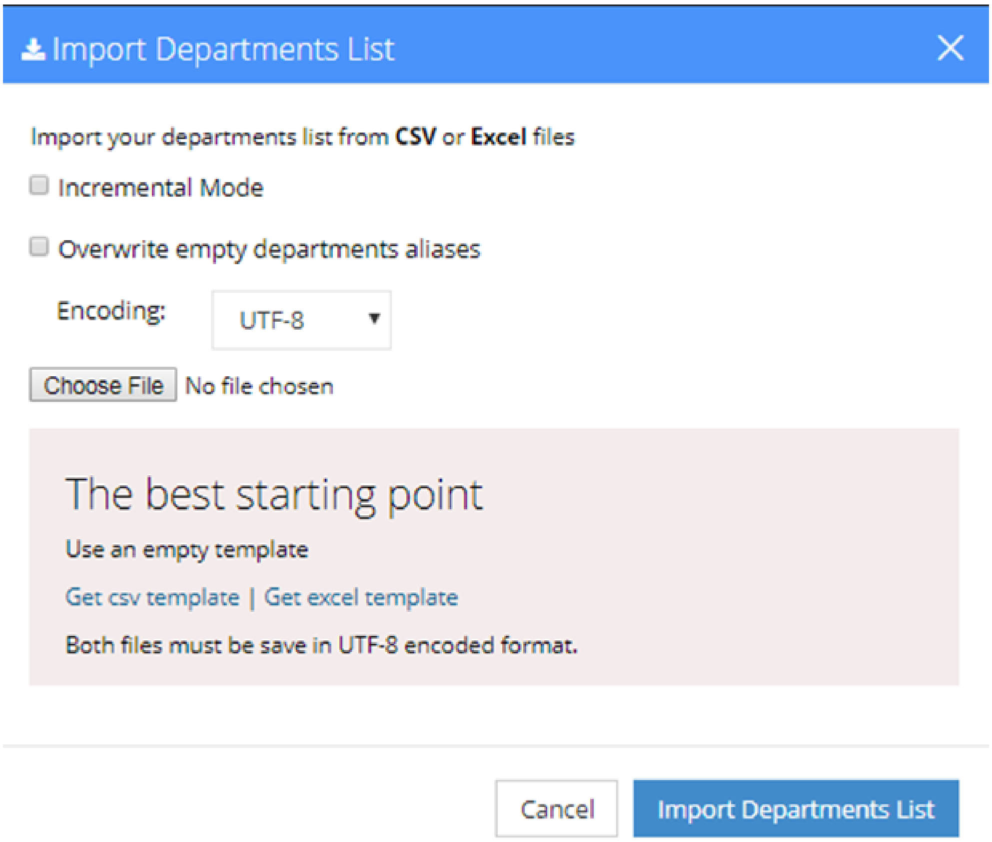


Importing Department Information

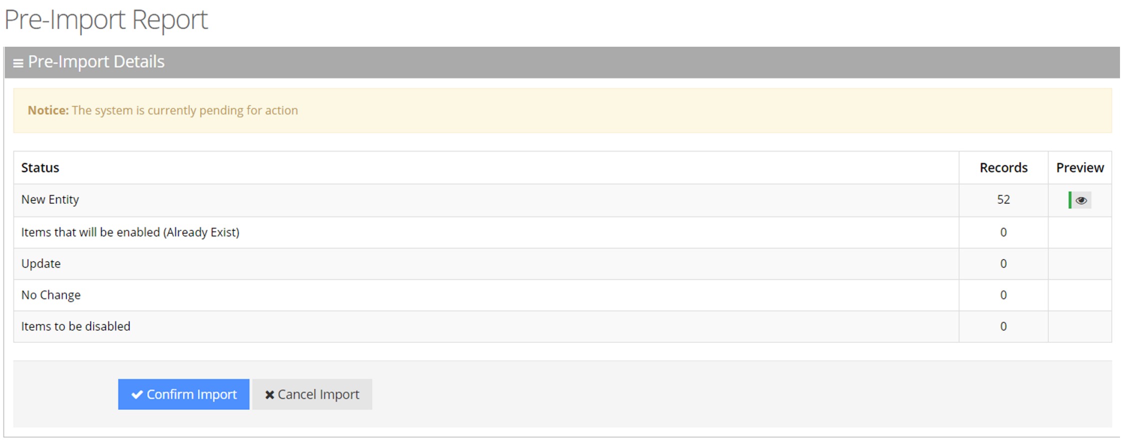
The procedure below describes how to import department information.

➢ 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**.



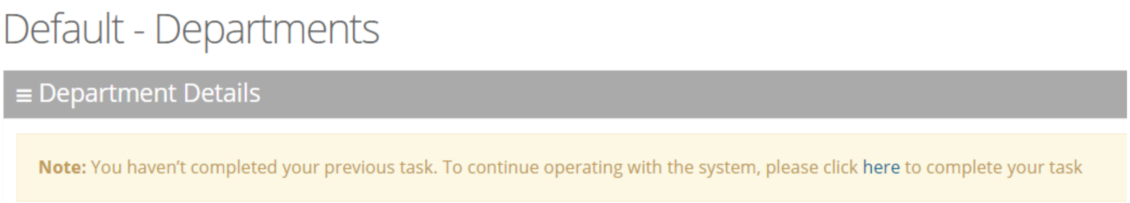
4. If you select the 'Incremental Mode' check box, only the records that you are importing are activated in your Departments List. All pre-existing records are disabled.
5. If you select the 'Overwrite empty departments aliases' check box, all empty departments aliases in the imported file are overwritten.
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**.



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.

10. 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:



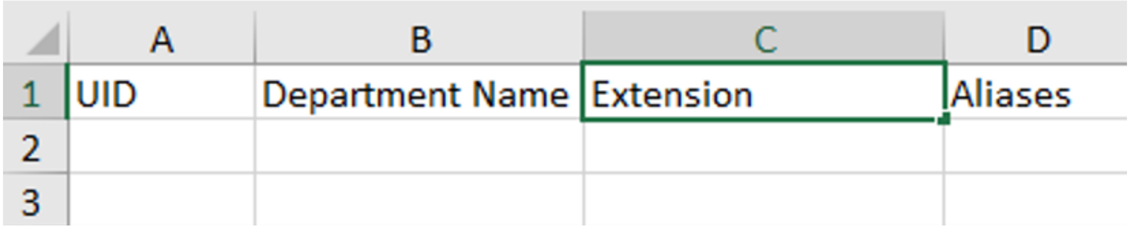
11. You can return to the **Confirm Import** or **Cancel Import** processes by clicking on the **here** link.

12. 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.

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

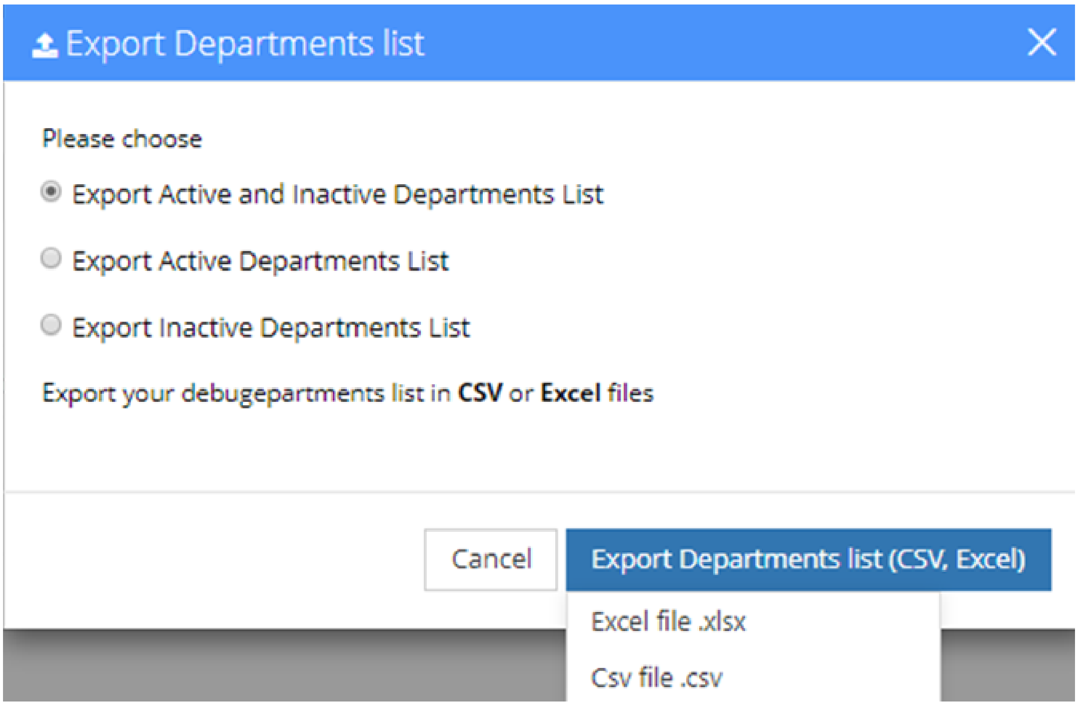


Exporting Department Information

The procedure below describes how to export department information.

➢ **To export department information:**

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



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

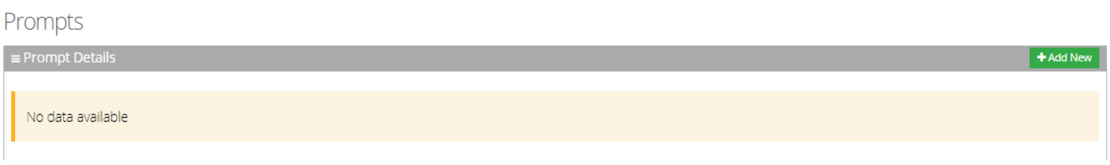
Adding a Voice Prompt

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.

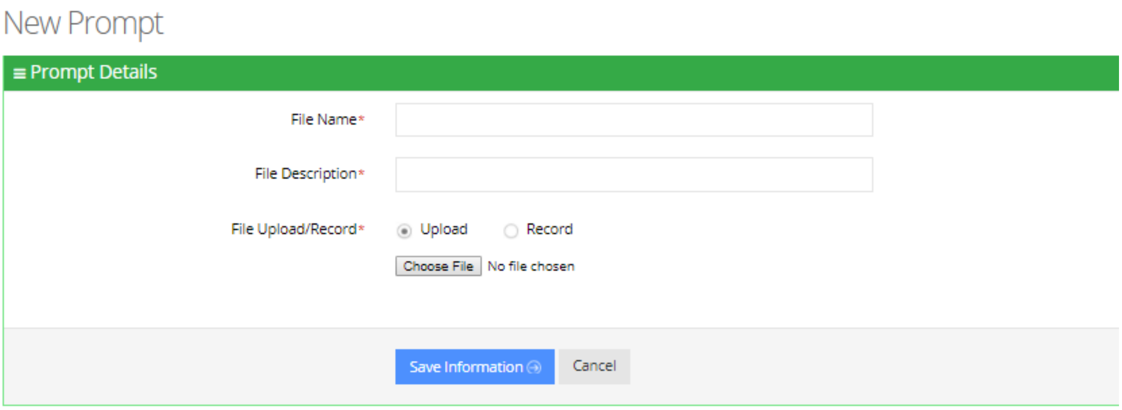
The procedure below describes how to upload an audio prompt for the Voca service.

➢ To add a new prompt:

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



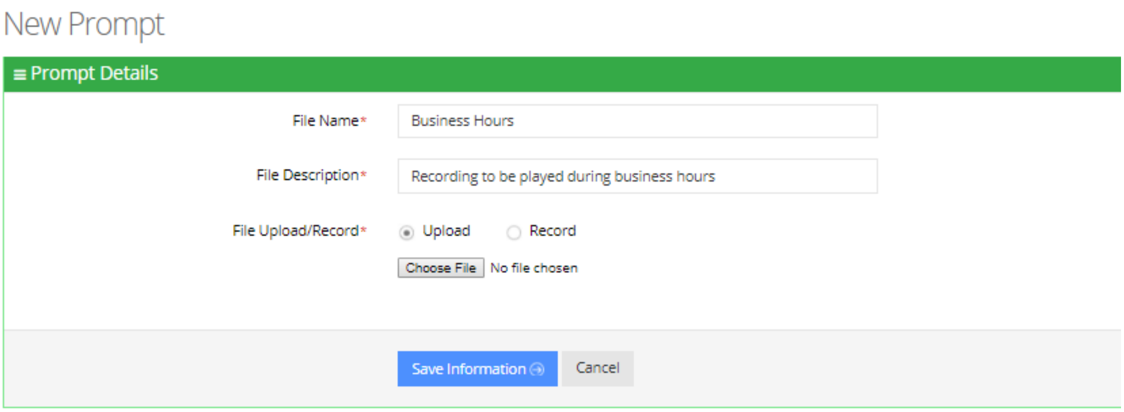
2. From the Prompts screen, click **Add New**; the following appears:



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.

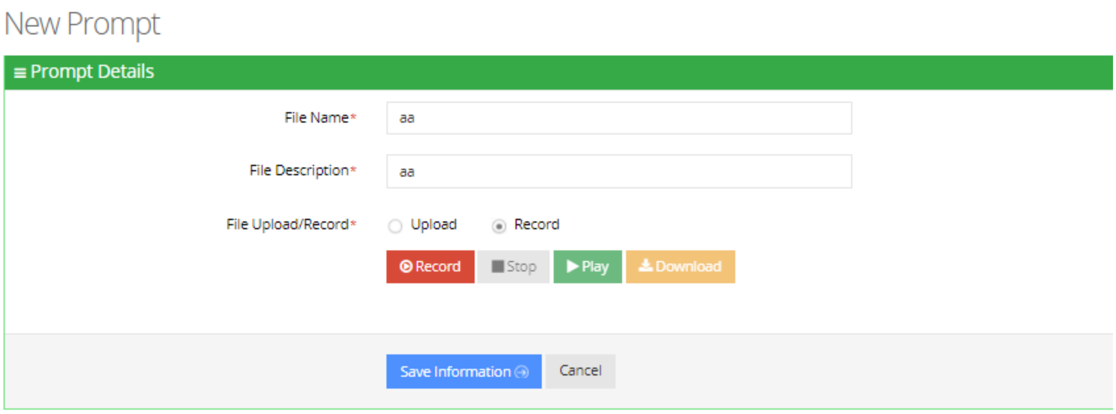


3. Click **Save Information** to complete the upload process.

> 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.



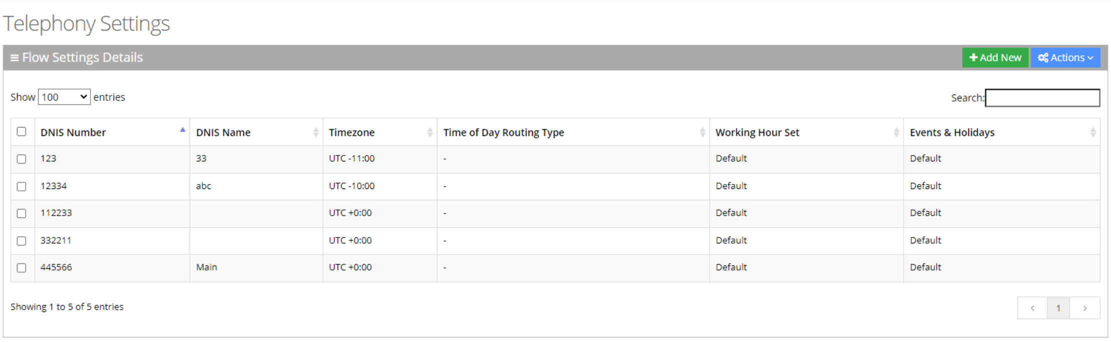
2. When finished recording, click **Stop**.
3. To replay the recent recording, click **Play**.
4. To save a copy of the recorded audio file, click **Download**.
5. Click **Save Information** to complete the recording process.

Configuring Telephony Settings

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

➢ To view telephony settings:

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



DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
123	33	UTC -11:00	-	Default	Default
12334	abc	UTC -10:00	-	Default	Default
112233		UTC +0:00	-	Default	Default
332211		UTC +0:00	-	Default	Default
445566	Main	UTC +0:00	-	Default	Default

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:

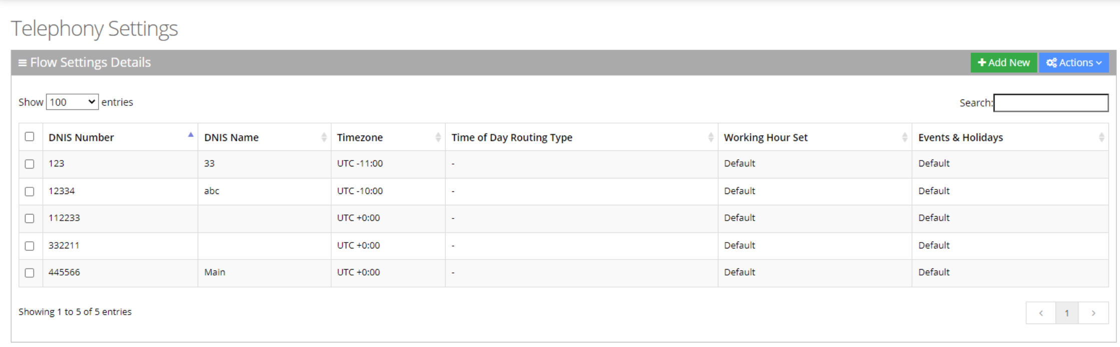
- **Working Hour Set:** Defines which working hour set will be used to define the working/non-working days/time for the flow.
- **Events & Holidays:** Selects the relevant Events and Holidays set. Events and Holidays actions take precedence over Working Hours actions. (see Defining Events and Holidays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

Adding a Flow Setting

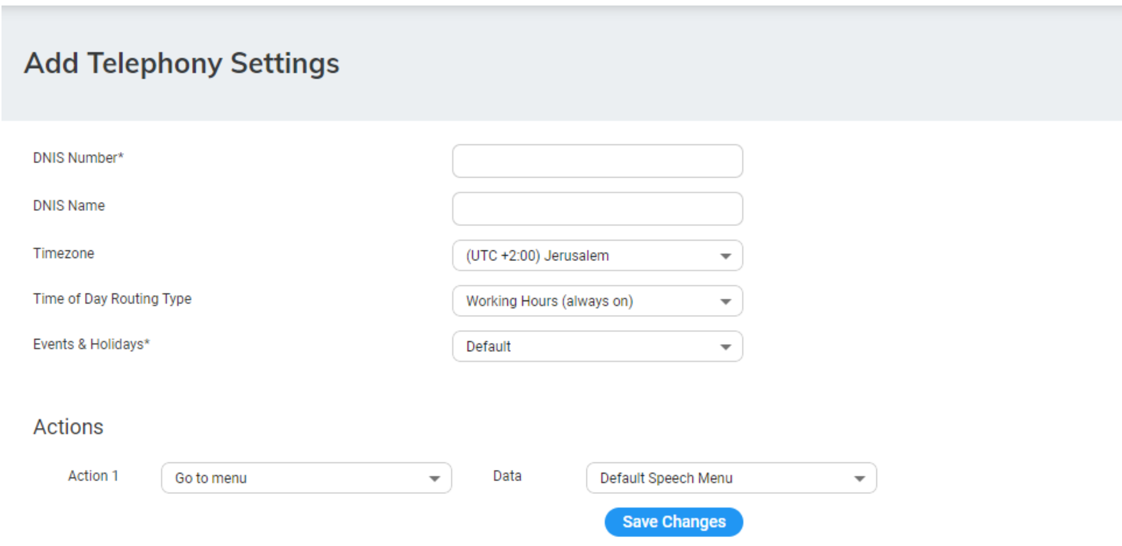
The procedure below describes how to add a flow setting.

➢ To add a flow setting:

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



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



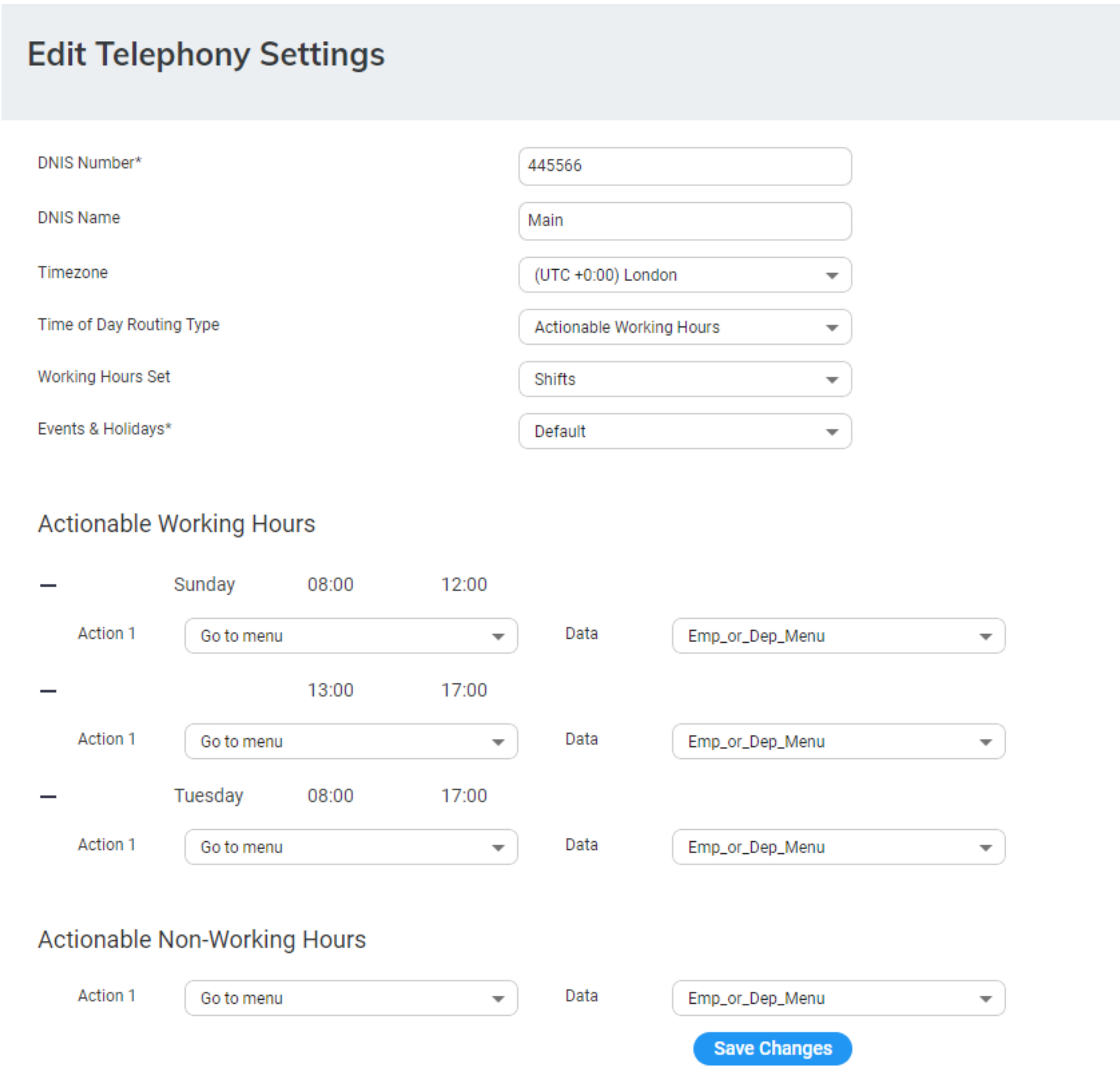
3. In the 'DNIS Number' field, enter the access phone number for the IVR service. e.g., 5555.
4. In the 'DNIS Name' field, enter the name of the IVR service.

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.

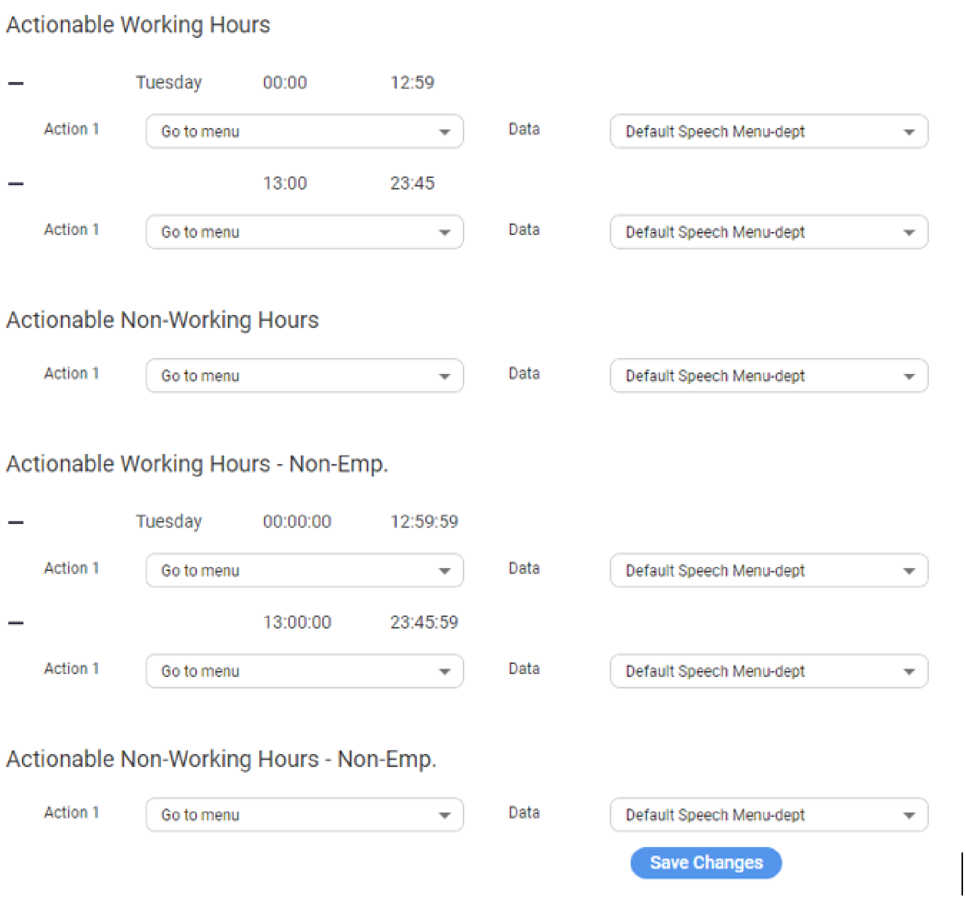
6. From the 'Time Of Day Routing Type' drop-down list, select the method for handling incoming calls based on working hours. This can be set by editing the three options in the Flow Settings records:

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.



- 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.



For more information of the possible Actions, see Actions.

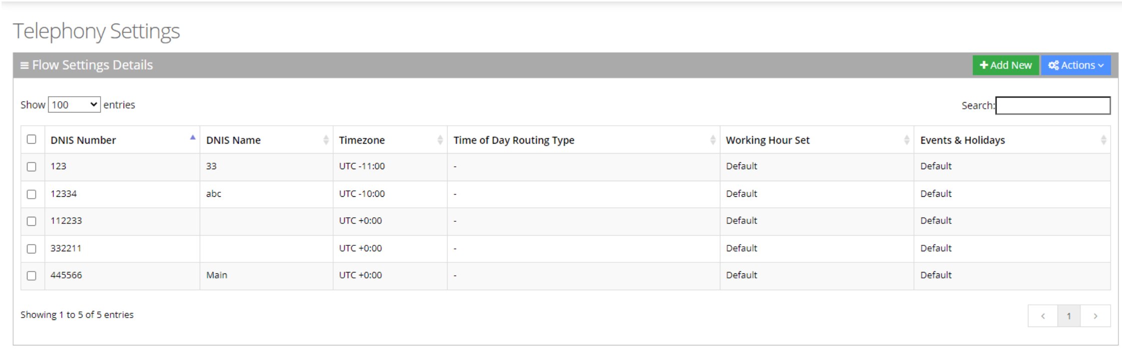
7. Add your details, and then click **Save Changes**.

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**).



	DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
☐	123	33	UTC -11:00	-	Default	Default
☐	12334	abc	UTC -10:00	-	Default	Default
☐	112233		UTC +0:00	-	Default	Default
☐	332211		UTC +0:00	-	Default	Default
☐	445566	Main	UTC +0:00	-	Default	Default

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:

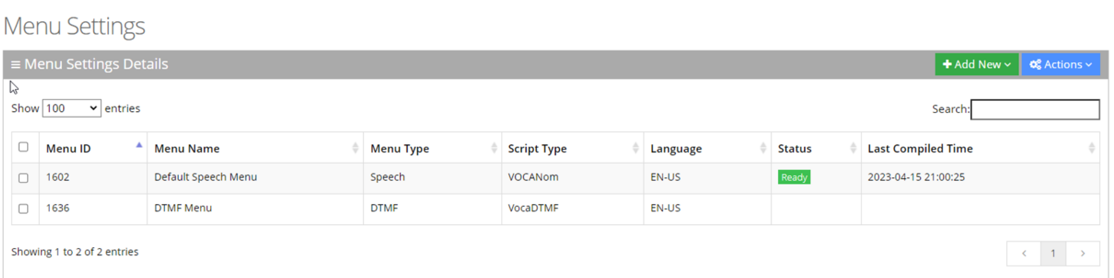
- DTMF Menu
- Speech Menu

Adding a DTMF Menu

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

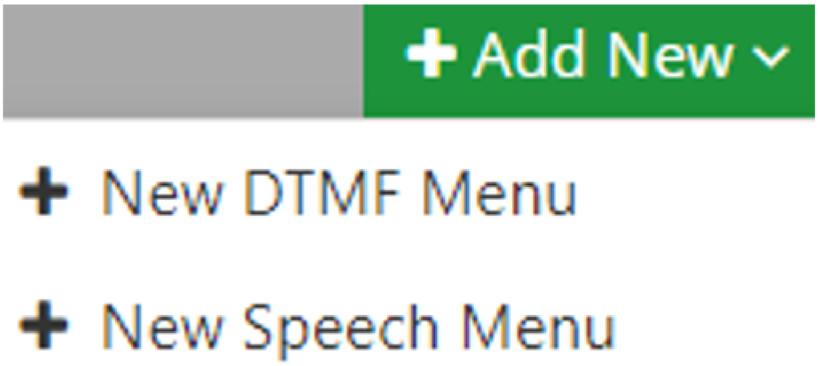
➢ To add a DTMF menu:

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

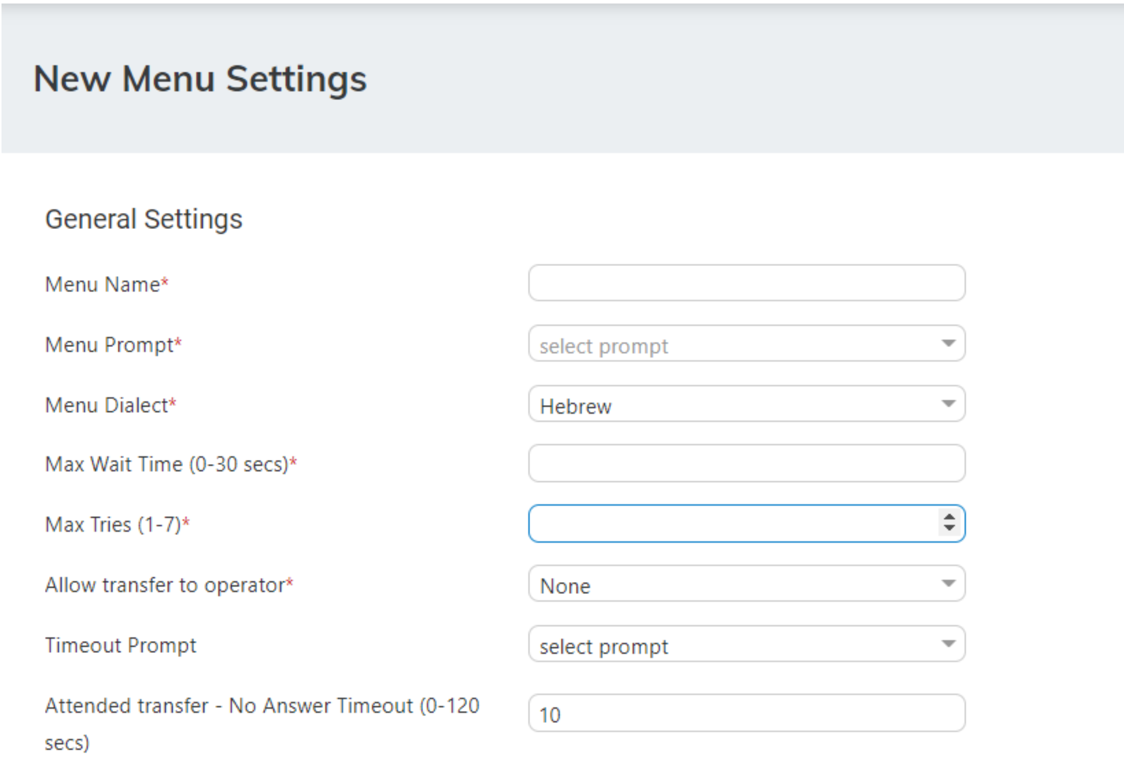


	Menu ID	Menu Name	Menu Type	Script Type	Language	Status	Last Compiled Time
☐	1602	Default Speech Menu	Speech	VOCANom	EN-US	Ready	2023-04-15 21:00:25
☐	1636	DTMF Menu	DTMF	VocaDTMF	EN-US		

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



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



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.

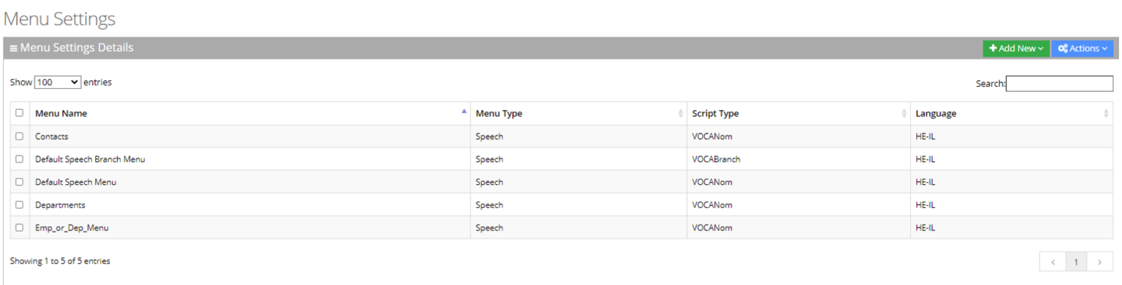
9. In the 'Operator Extension Non-Working Hours' field, enter the Operator's extension during non-working hours. This field appears only if the 'Allow transfer to operator' field is set to one of the following values:
   - Anonymous
   - Employee
   - All
     In these cases, the 'Operator extension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

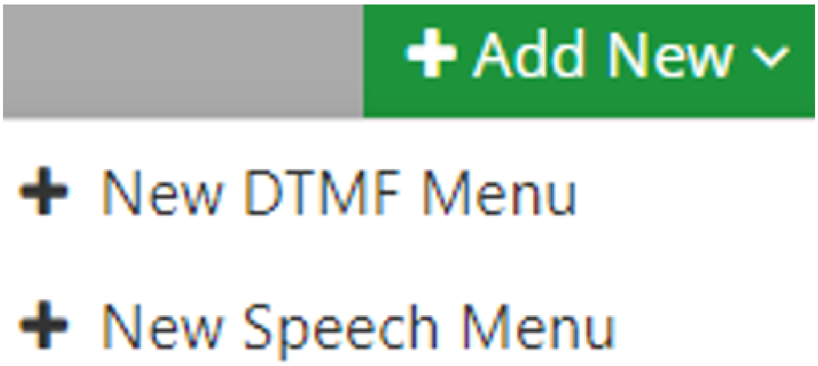
The procedure below describes how to add an Interactive Voice Response (IVR) speech menu.

➢ To add a Speech Menu:

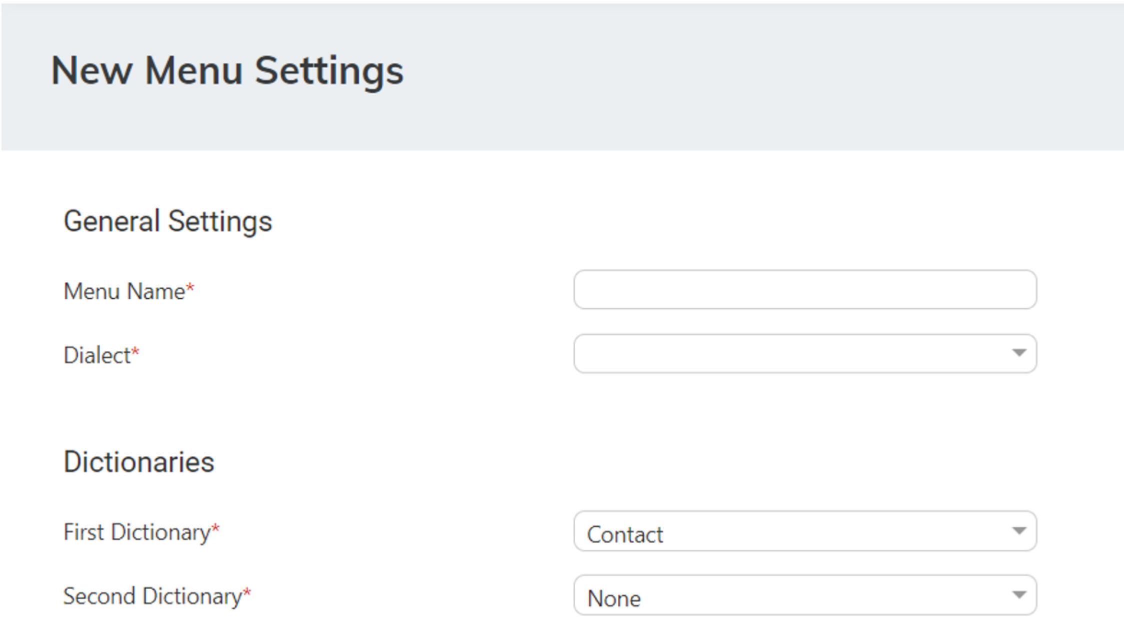
1. Open the Menu Settings page (**Configuration** > **Menu Settings**); the following example appears.



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



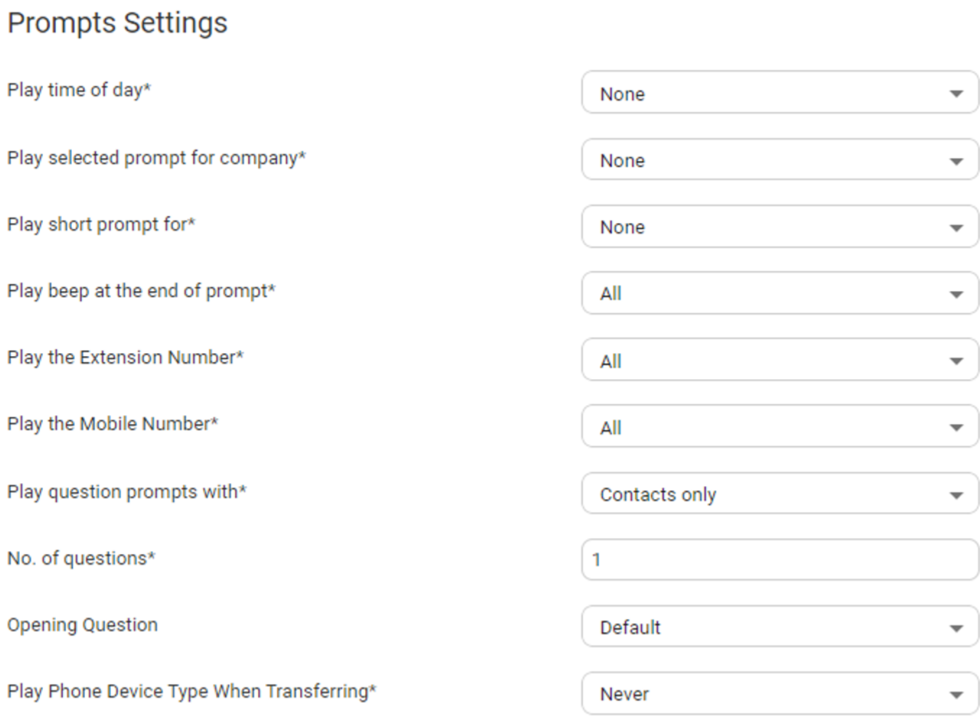
3. Select the **+ New Speech Menu**; the New Menu Settings page appears:



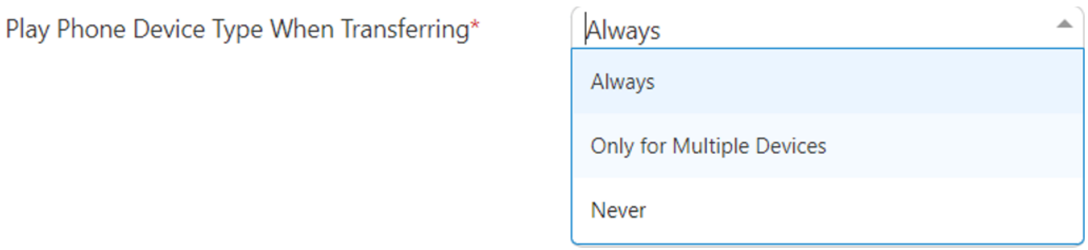
4. Under the **Dictionaries** group, select the 'First Dictionary' and 'Second Dictionary' fields to be used for the menu. The 'Second Dictionary' can be set to "None". The Contact dictionary contains Contact Names without departments. The dictionaries are taken from the Dictionary List in the Department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

5. Under the **Prompts Settings** group, select the prompts to play:

   - None
   - Anonymous
   - Employees
   - All

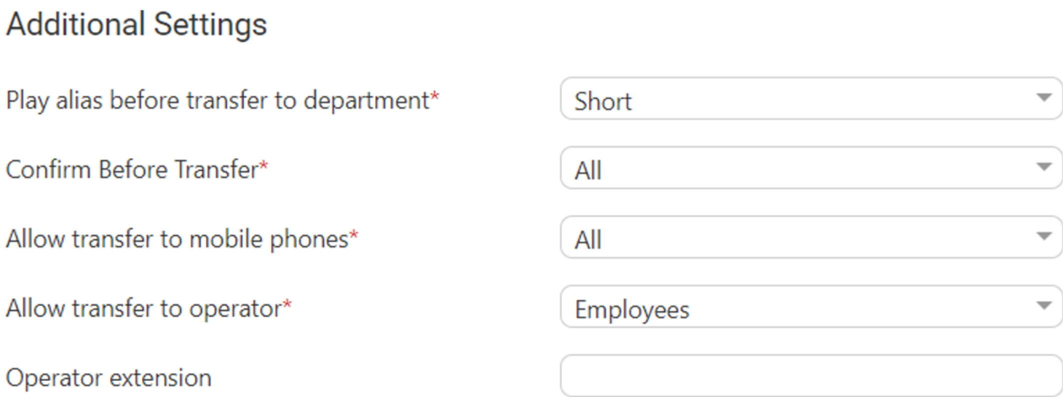


- **‘Play time of day’:** Select for which group you are playing the time system menu prompts.
- **‘Play selected prompt for company’:** Select for which group you are playing the selected prompt.
- **‘Play short prompt for’:** Select for which group you are playing the short prompt.
- **‘Play beep at 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.



- **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:



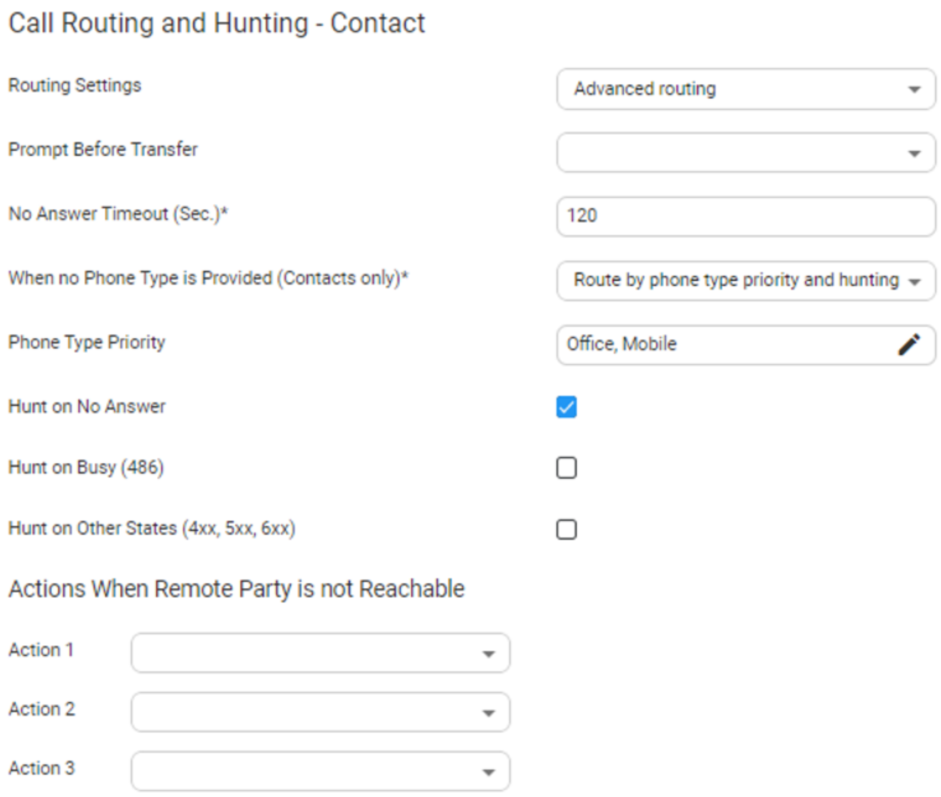
- 'Play alias before transfer to department' field: select one of the following options:
  - **Short:** If the alias was recognized, the system plays the recognized alias instead of the Department name before the transfer. If there is disambiguation between departments, the alias is played before playing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

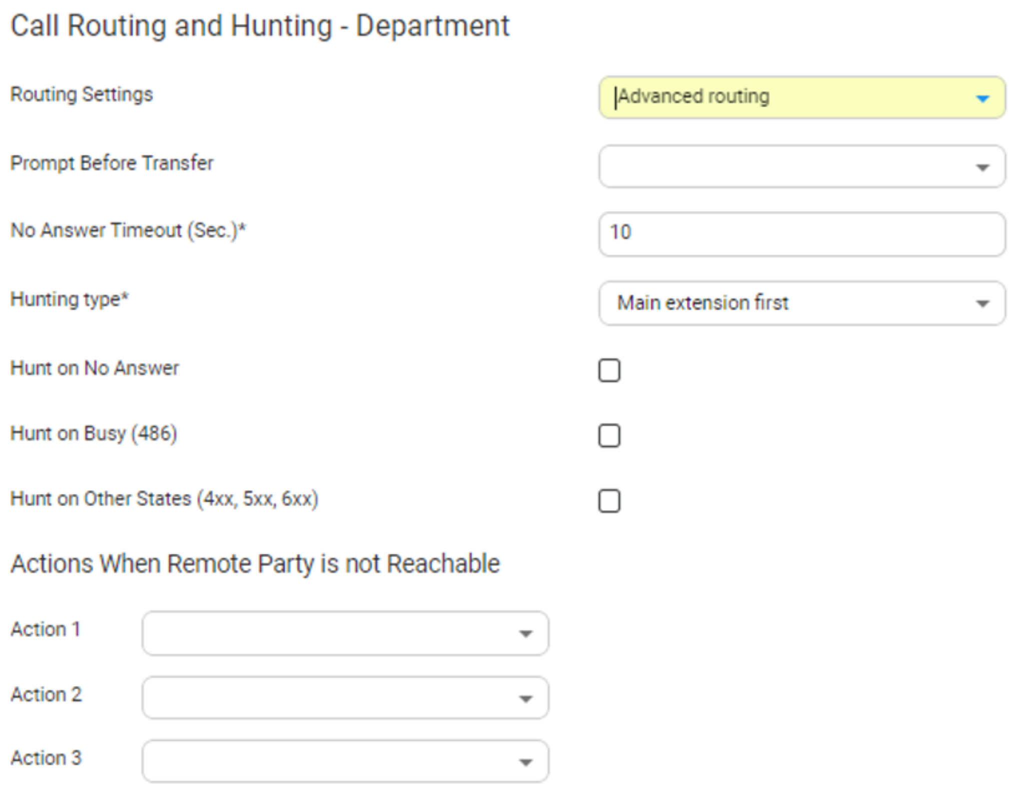
7. Under the **Call Routing and Hunting - Contact** group from the 'Routing Settings' drop-down list, select either:
    - **Basic routing (default):** The call routing process remains as it is currently set.
    - **Advanced routing:** The call is set according to the following parameters:



- 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:

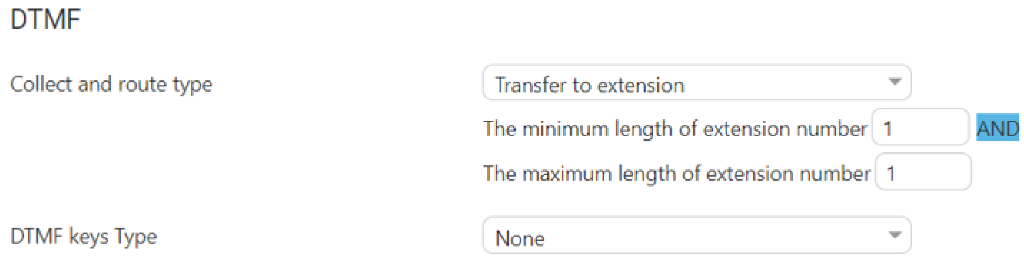


- From the 'Prompt Before Transfer' drop-down list, select a prompt from a list of available prompts, before the call is transferred.
- In the 'No answer timeout (0-120 secs)' field, set the time you want the system to wait for the remote side to answer the call, before moving to the next phone type, 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



- **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

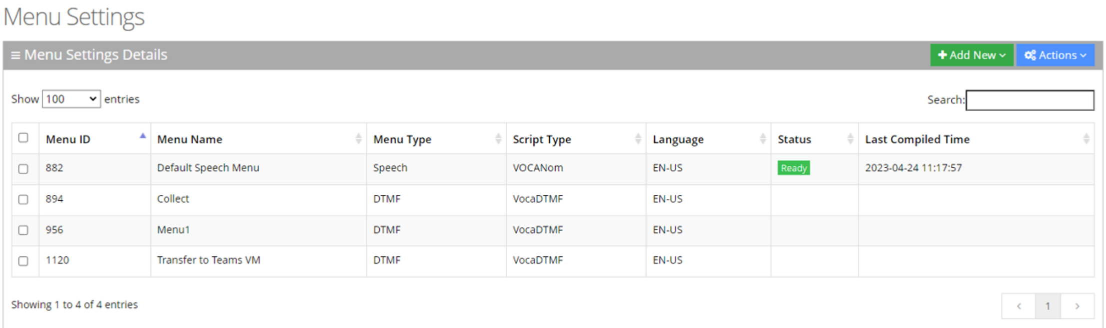
Editing Menu Settings

The procedure below describes how to edit menu settings.

➢ **To edit menu settings:**

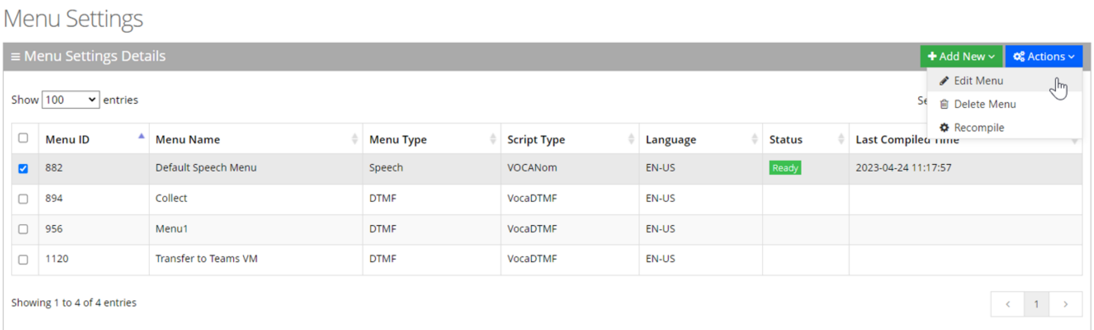
1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following screen example appears:

Figure 6-1:



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

Figure 6-2:



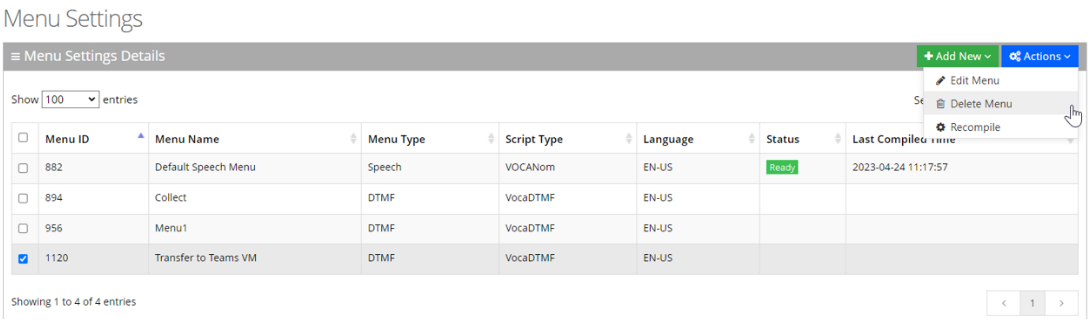
4. Select **Edit Menu**.
5. Edit the fields you want to change.
6. Click **Continue**.
7. Click **Save Changes**.

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.



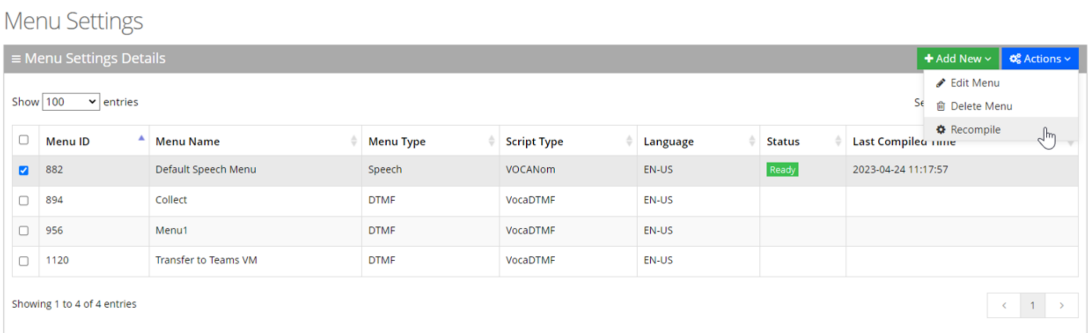
4. Select **Delete Menu**.
5. The following message appears: 'Are you sure you want to delete the selected menu?'
6. Click **OK** to delete the selected menu; a message appears that the menu was successfully deleted.

Recompile Menus

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

➢ To recompile menus:

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



The following columns show the compilation status:

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

- **Last compilation time:** Last time of menu compilation

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

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

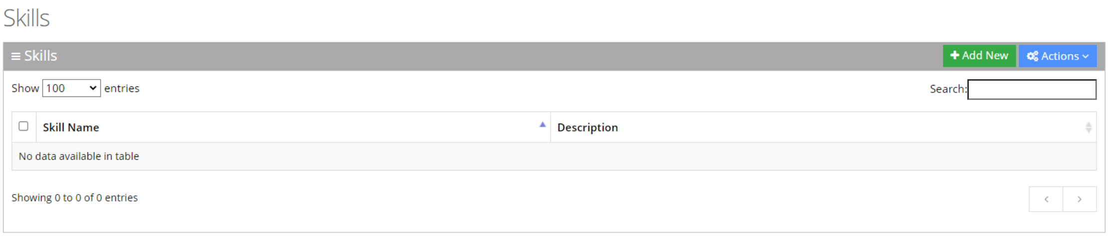
Skills are customer-definable labels assigned to workers. The Voca Interaction Center can route incoming calls to workers who have the necessary skills or sets of skills to handle the call.

Adding a Skill

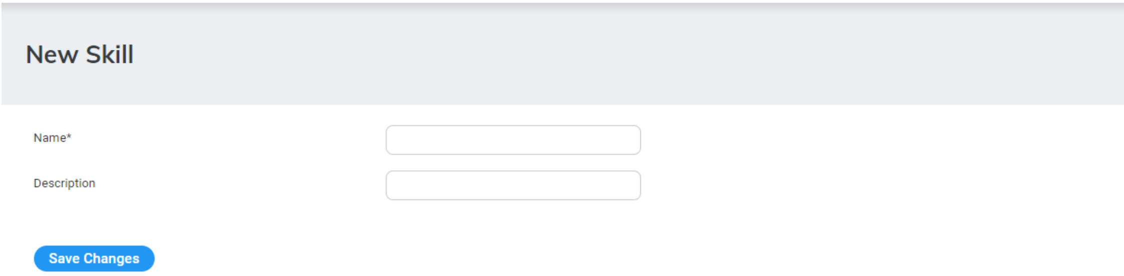
The procedure below describes how to add a Skill.

➢ **To add a skill:**

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



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



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

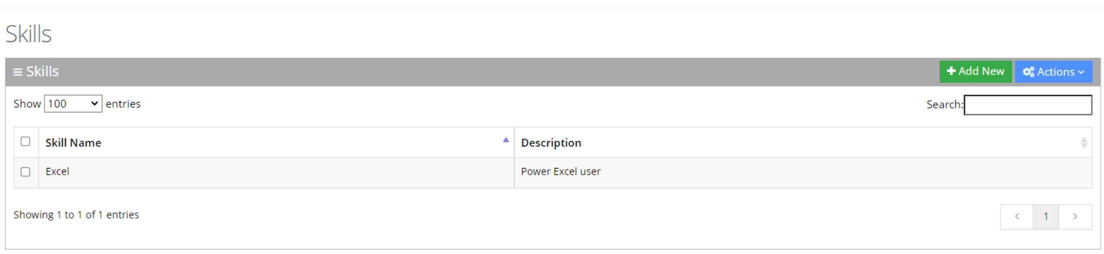
Editing a Skill

Editing a Skill

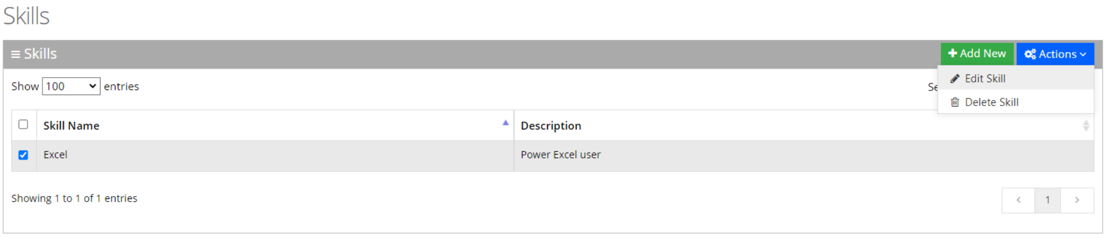
The procedure below describes how to edit a Skill.

➢ To edit a Skill:

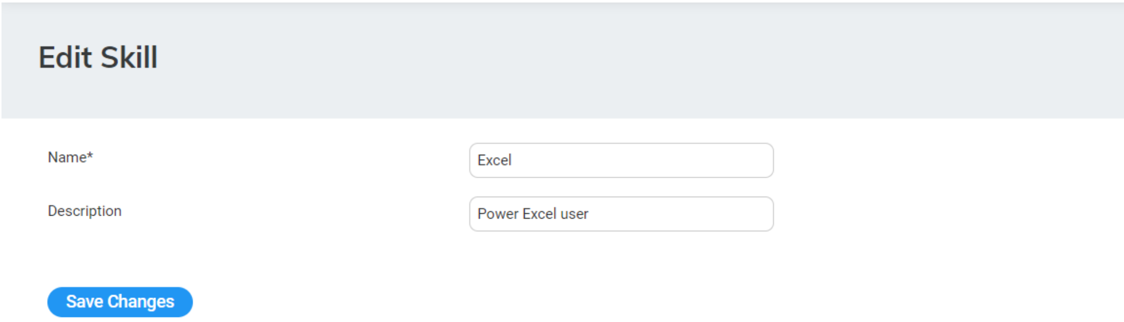
1. Open the Skills page (**Configuration** > **Routing** > **Skills**); the following appears:



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



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



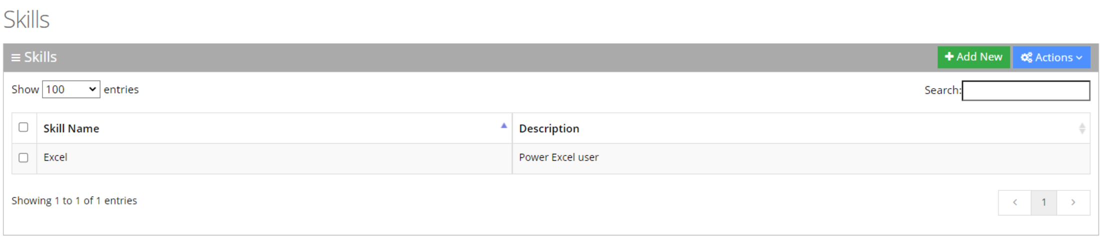
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Skill

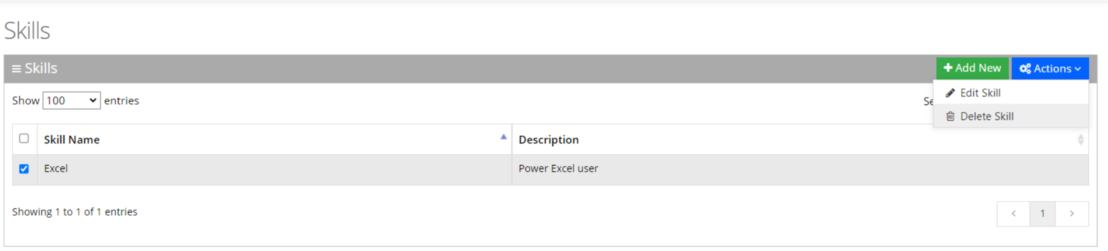
The procedure below describes how to delete a Skill.

➢ To delete a Skill:

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



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



A confirmation message box appears.

4. 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**.

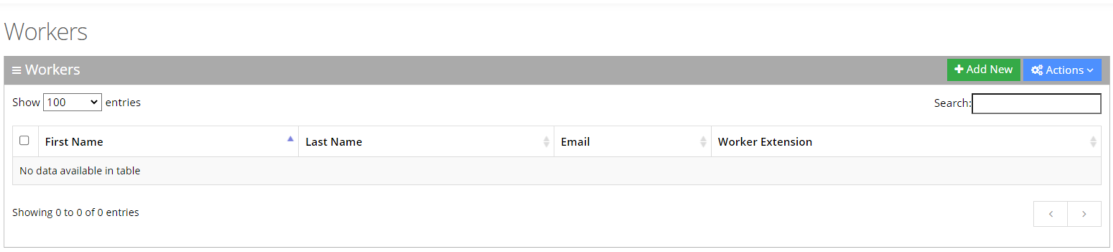
> When the administrator adds a new Worker with a 'Worker Type' with a value of **Supervisor**, it means that the supervisor not only has also worker capabilities to handle calls, but can also can manage and monitor that supervisor's workers.

Adding a Worker

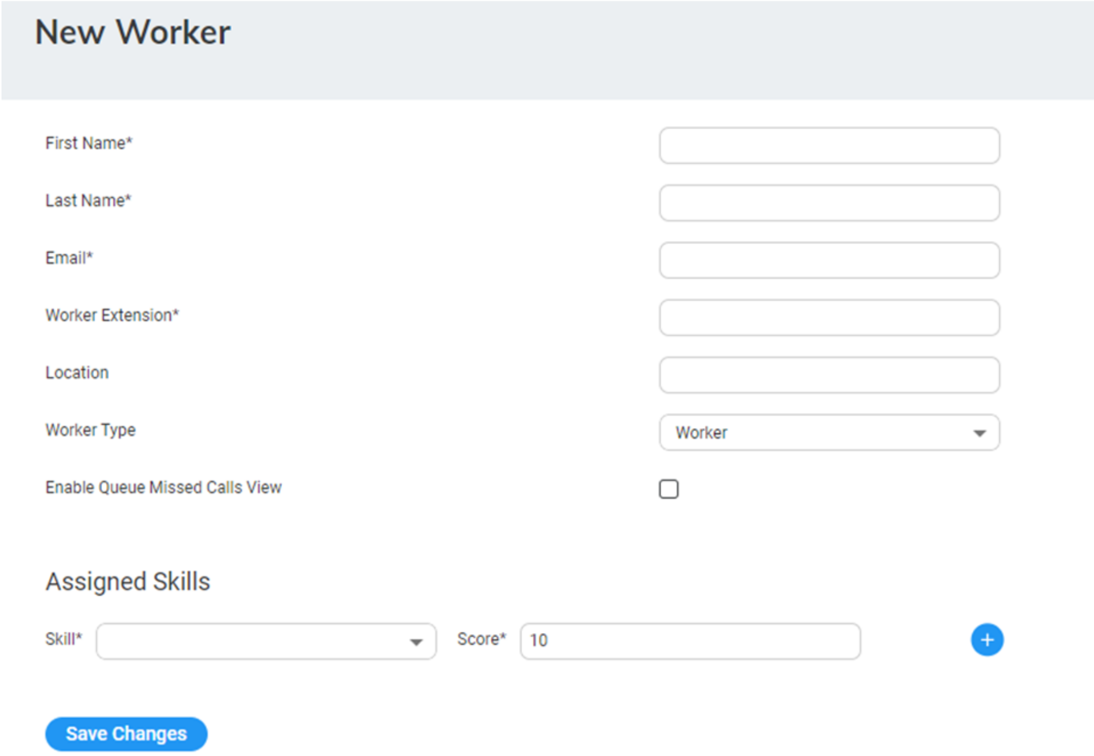
The procedure below describes how add a Worker or Supervisor.

➢ **To add a Worker:**

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



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



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:

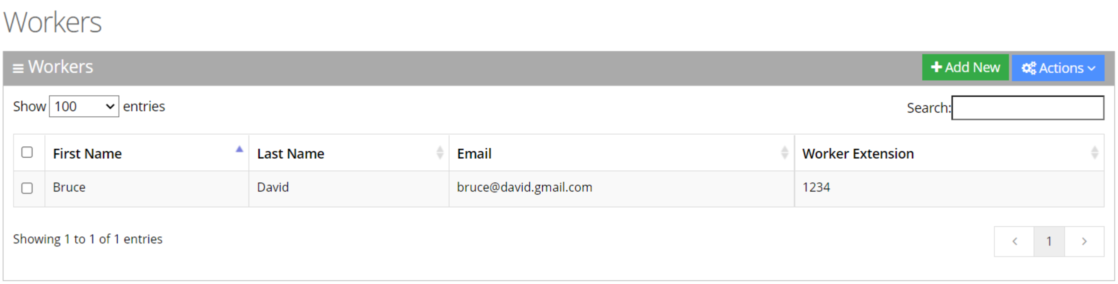
- Basic queues that the Supervisor is assigned to as a Supervisor (see Configuring Call Queues on page 74)
- Skill-based queues their supervised Workers (in relevant Worker Groups) relate to
- All Tenant Workers
- Worker Groups they supervise
- Relevant Reports

Editing a Worker

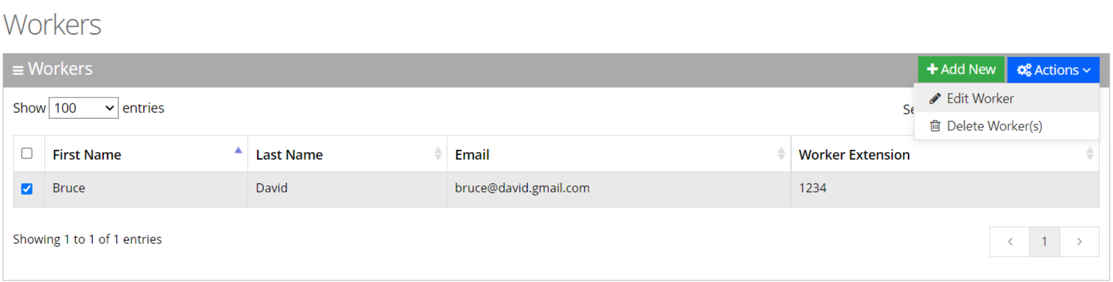
The procedure below describes how to edit a Worker.

➢ To edit a Worker:

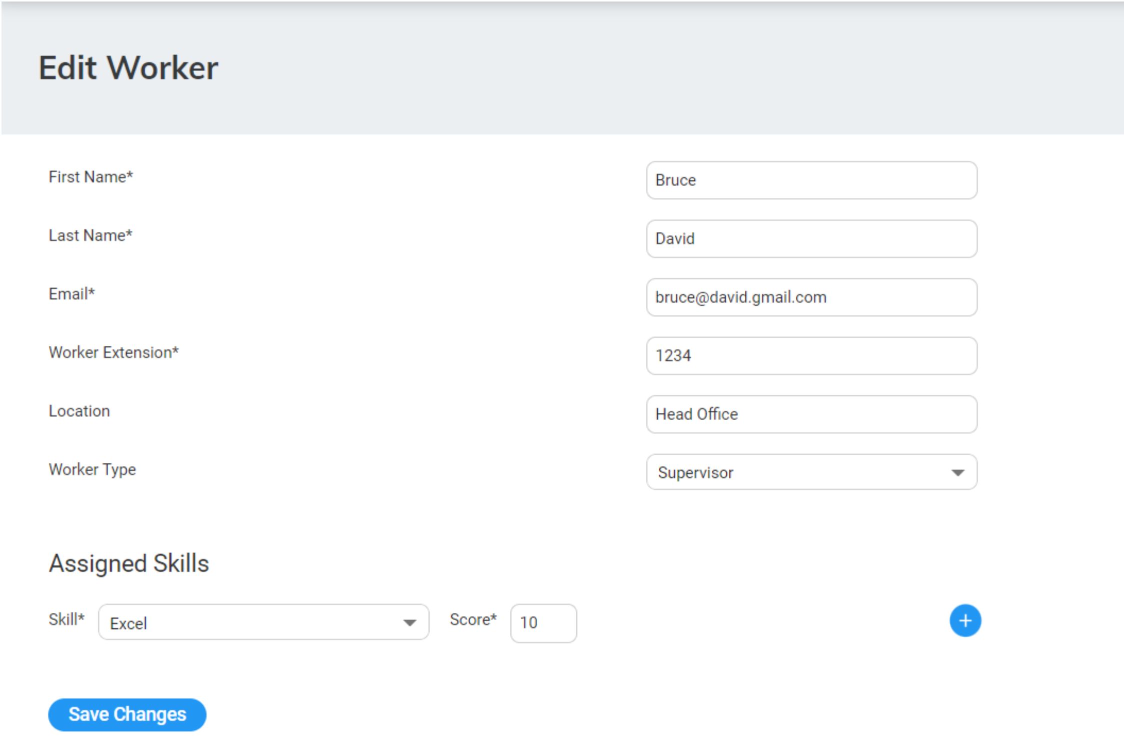
1. Open the Workers page (**Configuration** > **Routing** > **Workers**); the following appears:



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



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



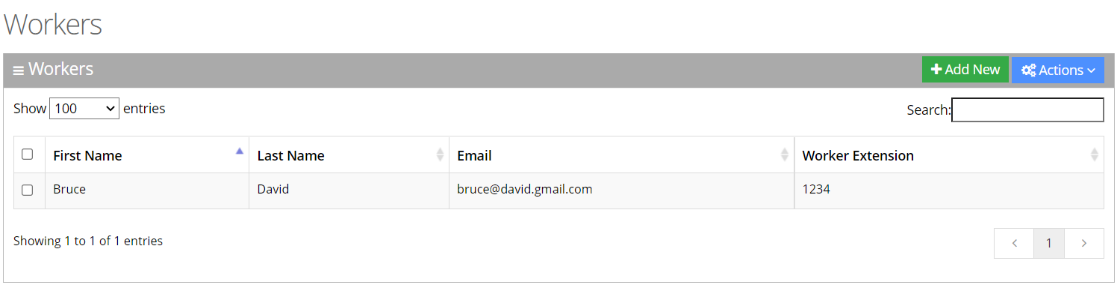
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Worker

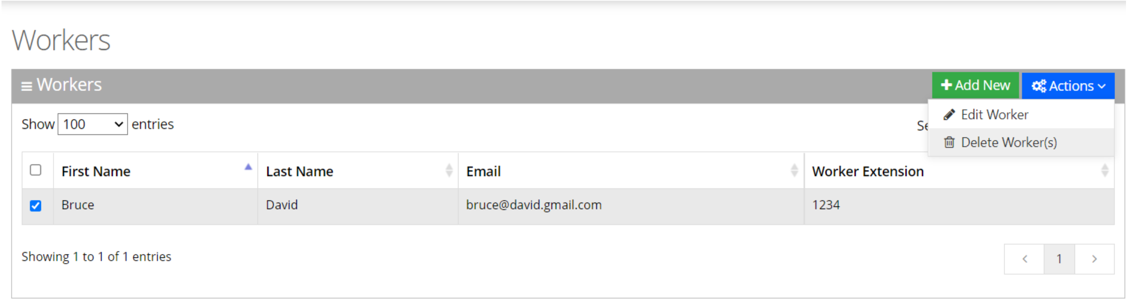
The procedure below describes how to delete a Worker.

➢ To delete a Worker:

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



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



A confirmation message box appears.

4. 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

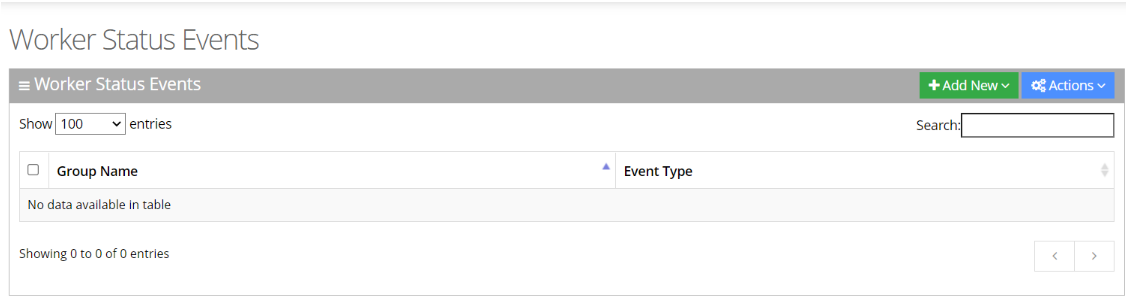
- **Shift End:** Worker must select this state before logout (if not selected, the “logout” button is locked)
- **Call Not Answered:** This happens when the worker was in ready state and didn’t answer to incoming call.
- **Engaged:** Call is ringing
- **Talking:** Worker is on active call

Adding Worker Status Events

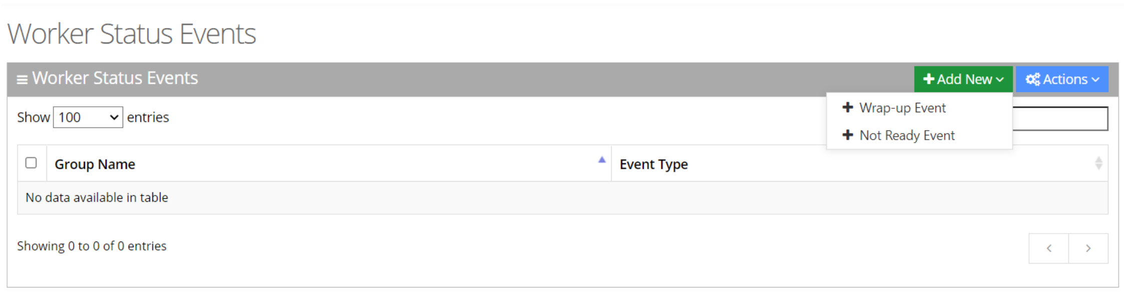
The procedure below describes how to add a Worker Status Event.

➢ To add a Worker status event:

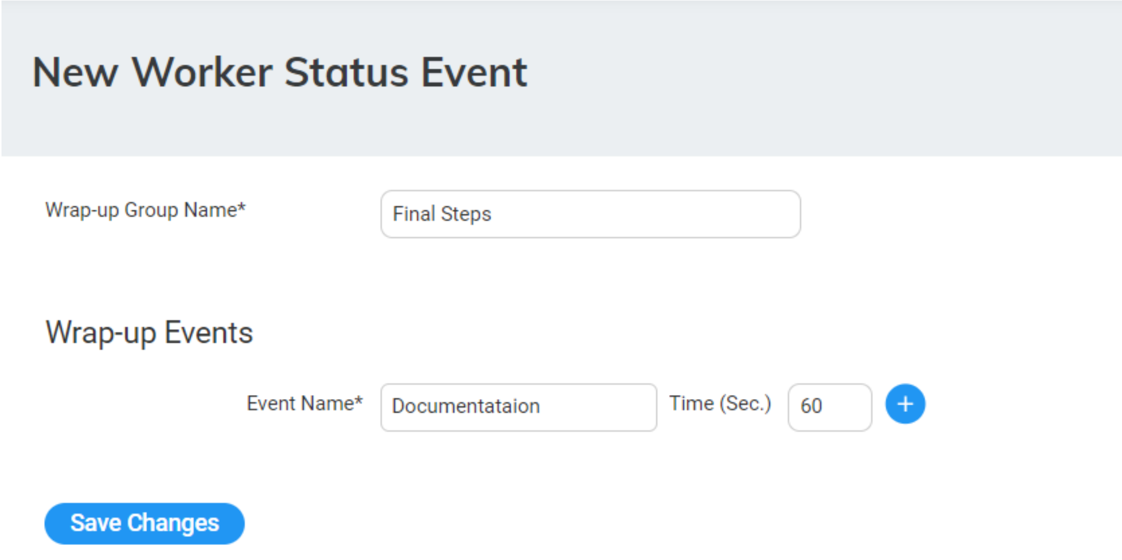
1. Open the Worker Status Events page (**Configuration** > **Routing** > **Worker Status Event**); the following appears:



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

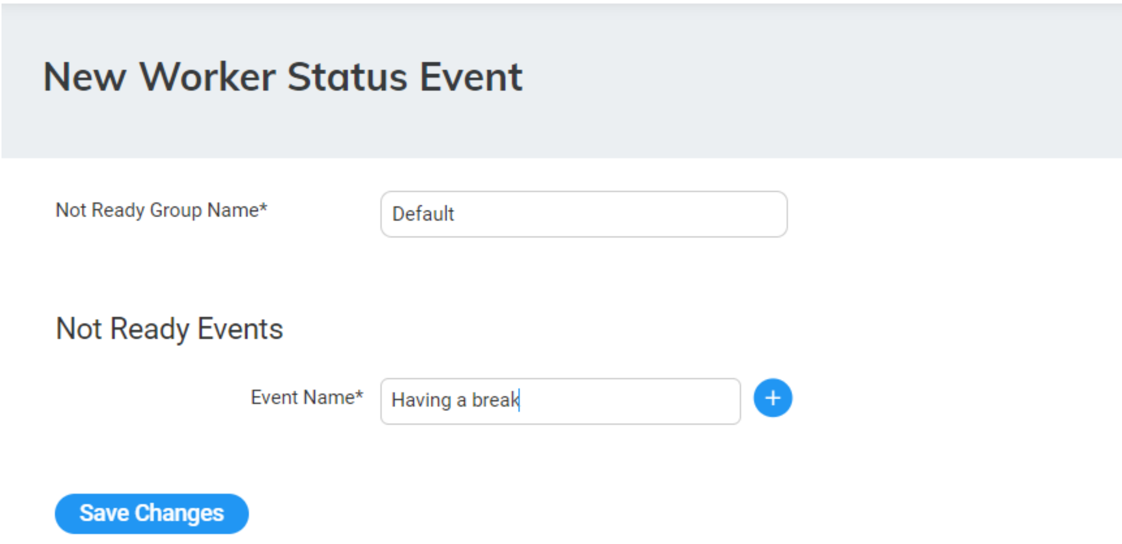


3. Select the type of event.
4. In the **Wrap-up Event**, enter the 'Group Name' and 'Event Name' in the appropriate fields.



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.



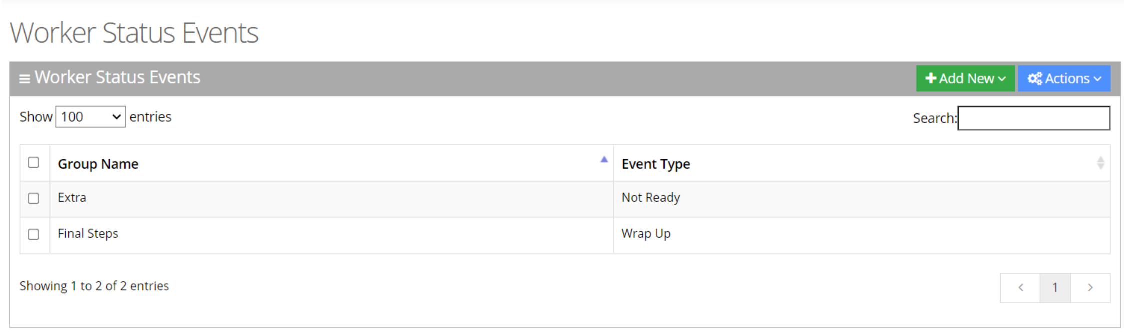
6. Click + to add additional events.
7. Click **Save Changes**.

Editing Worker Status Events

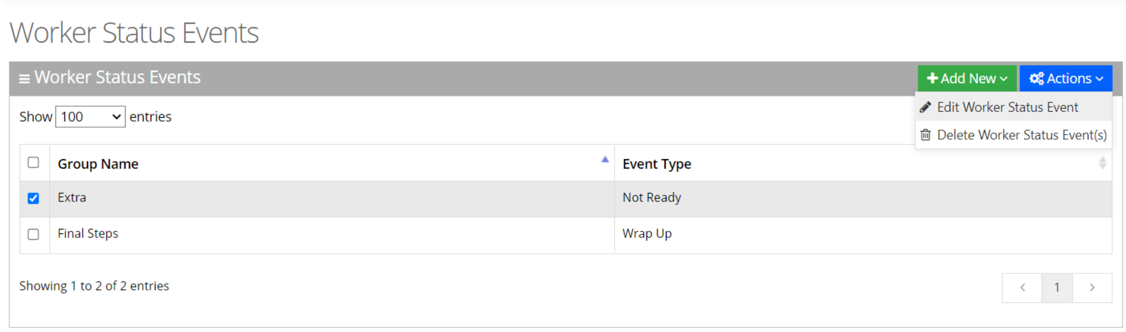
The procedure below describes how to edit a Worker Status Event.

➢ To edit a Worker Status Event:

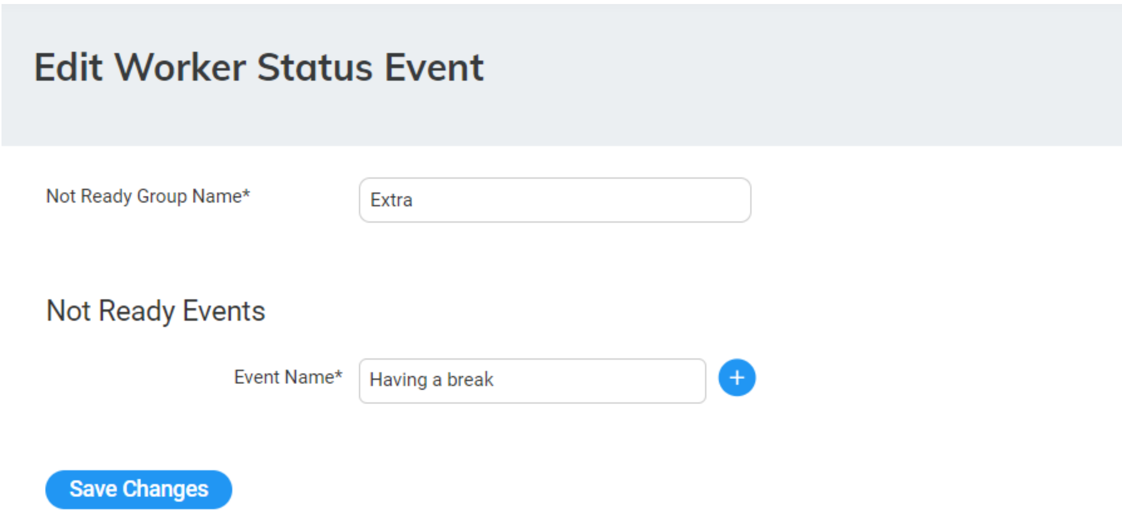
1. Open the Worker Status Events page (**Configuration** > **Routing** > **Worker Status Events**); the following appears:



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



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



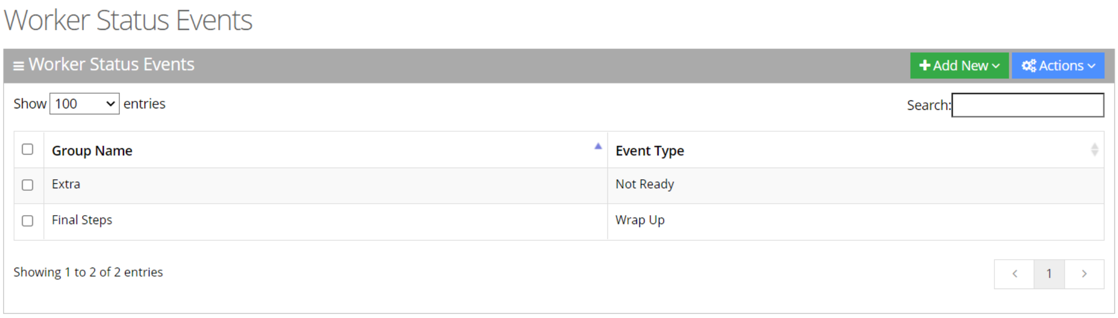
4. Make your necessary changes, and then click **Save Changes**.

Deleting Worker Status Events

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

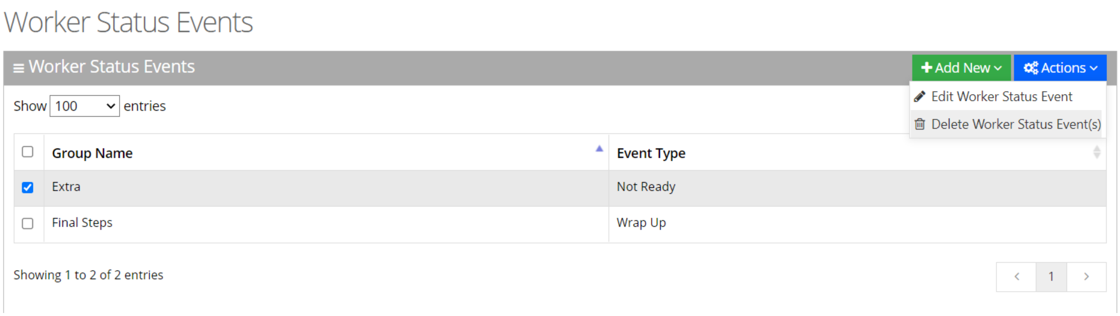
➢ To delete a Worker Status Event:

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



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)**.



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.

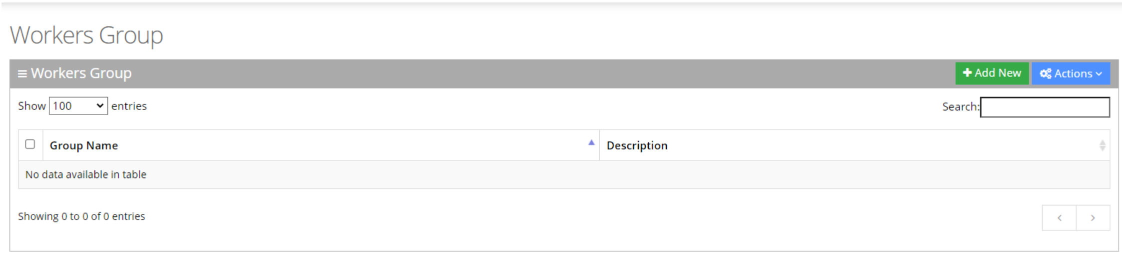
- Workers can be assigned to only one group.
- A Worker Group can only contain one Not-Ready Status event.

Adding a Worker Group

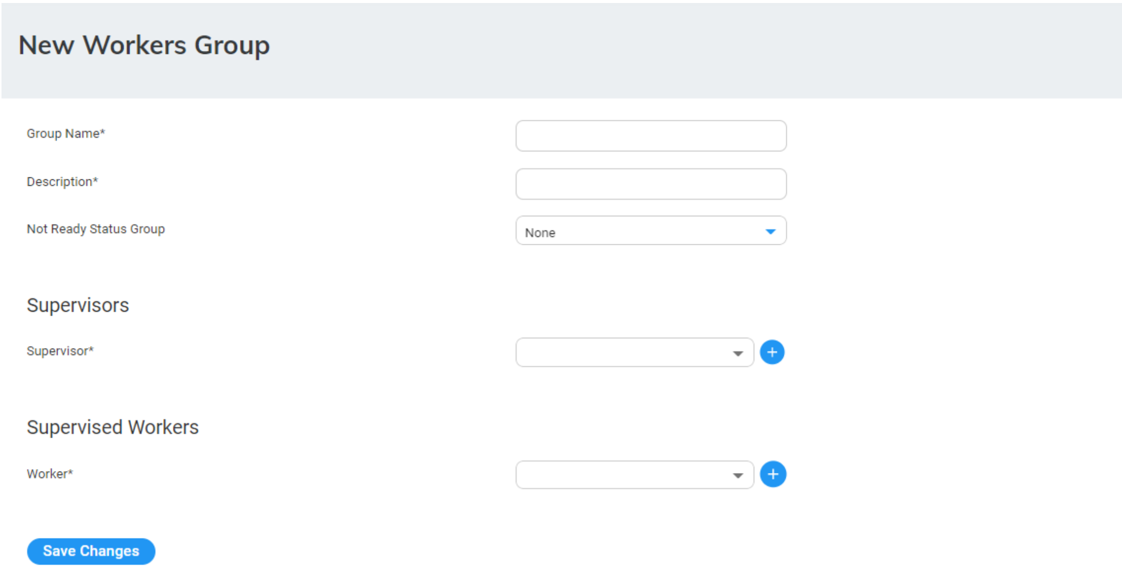
The procedure below describes how to add a Workers Group.

➢ 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:



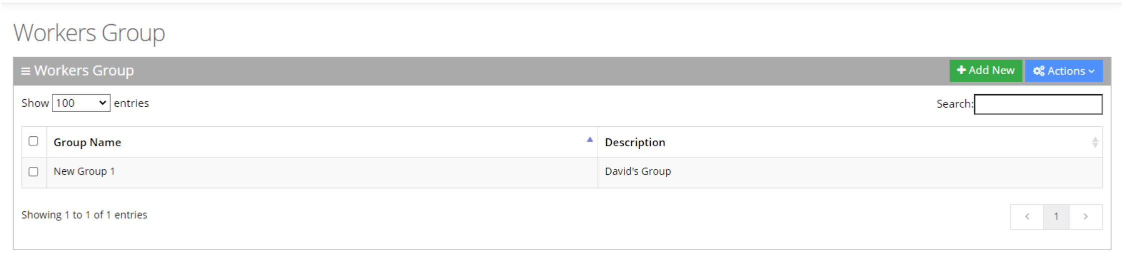
3. In the 'Group Name' field, enter the name of the Group.
4. In the 'Description' field, enter a description of the Group.
5. From the 'Not Ready Status Group' drop-down list, select the appropriate value.
6. From the 'Supervisor' drop-down list, select the Supervisor name of the group.
7. From the '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

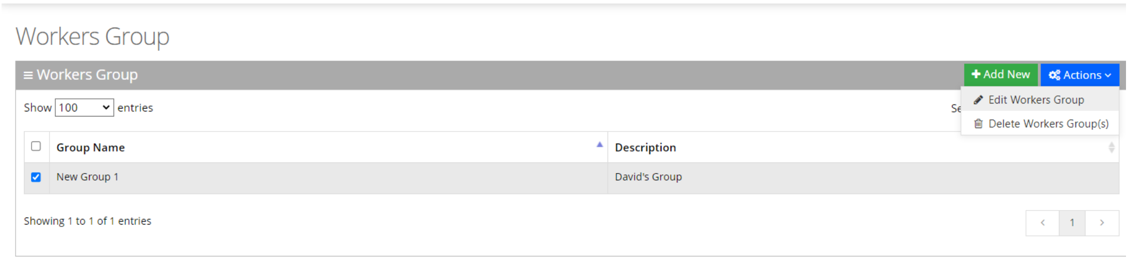
The procedure below describes how to edit a Workers Group.

➢ To edit a Workers Group:

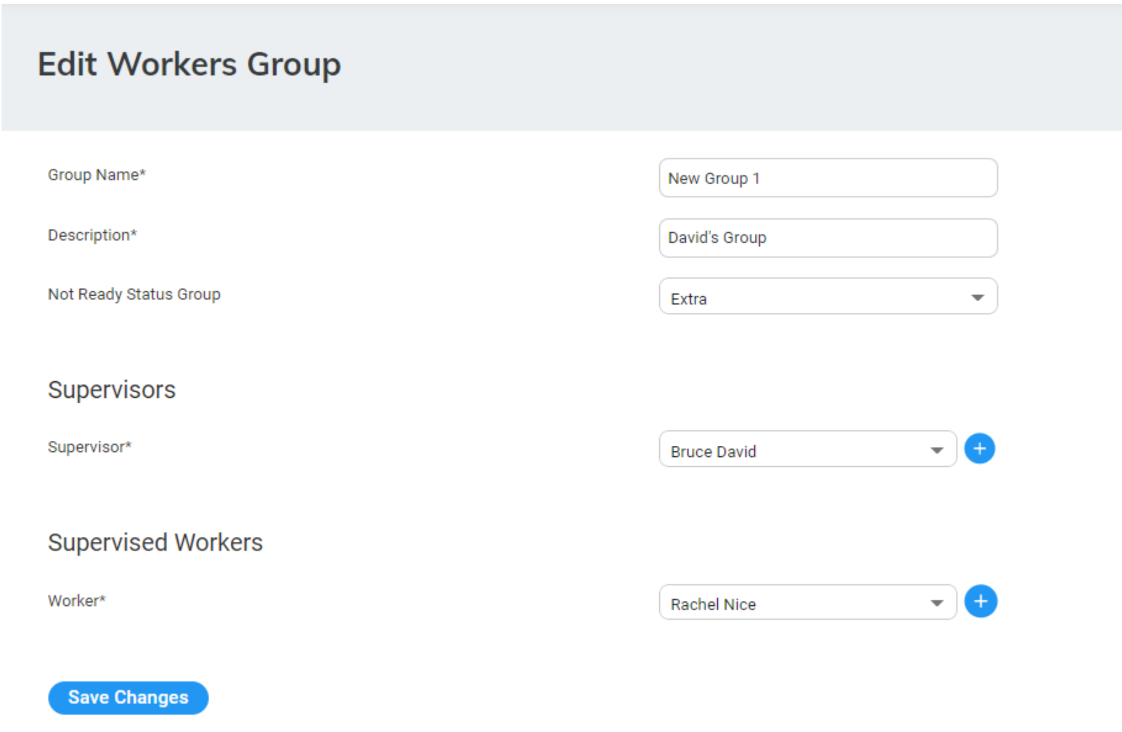
1. Open the Workers Group page (**Configuration** > **Routing** > **Workers Group**); the following appears:



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



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



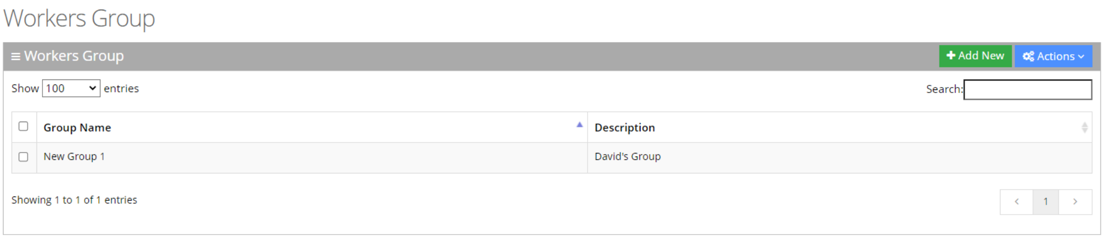
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Worker Group

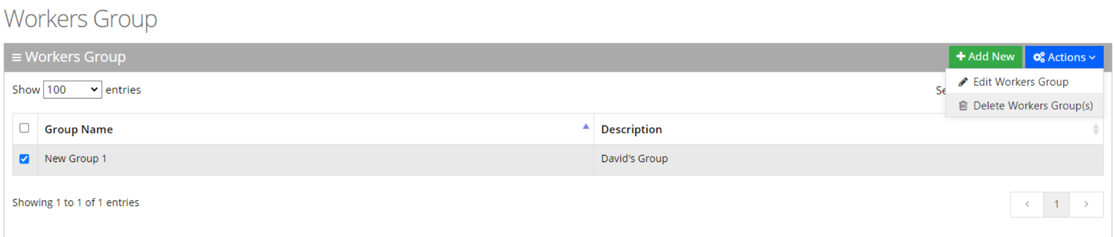
The procedure below describes how to delete a Workers Group.

➢ To delete a Workers Group:

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



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**.



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

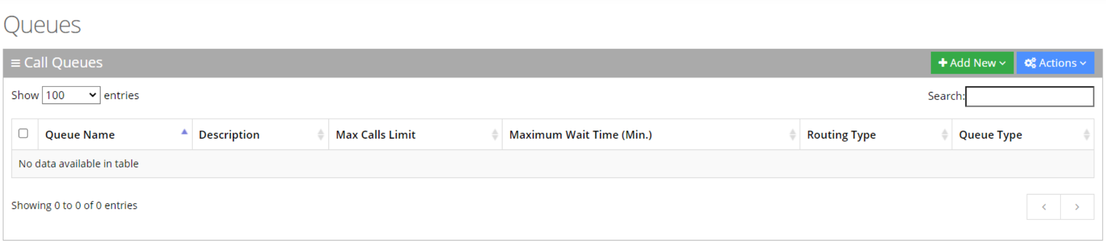
Call Queues provide the ability to place an incoming call in a queue before transferring it to one of its destination lists. When the call is in a queue, the caller hears music on hold. The system supports defining several call queues per customer or service.

Adding a Call Queue

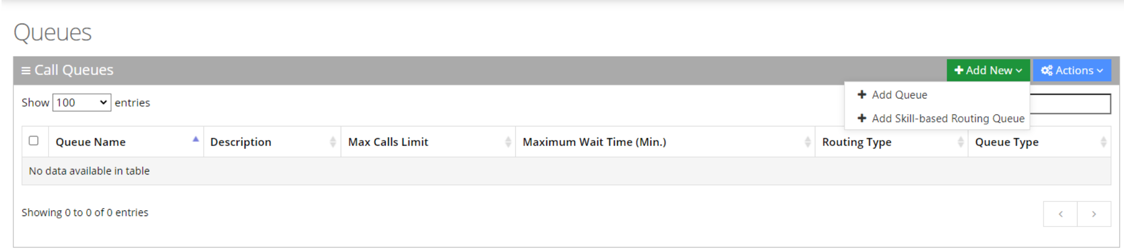
The procedure below describes how to add a new Call Queue.

➢ To add a new Call Queue:

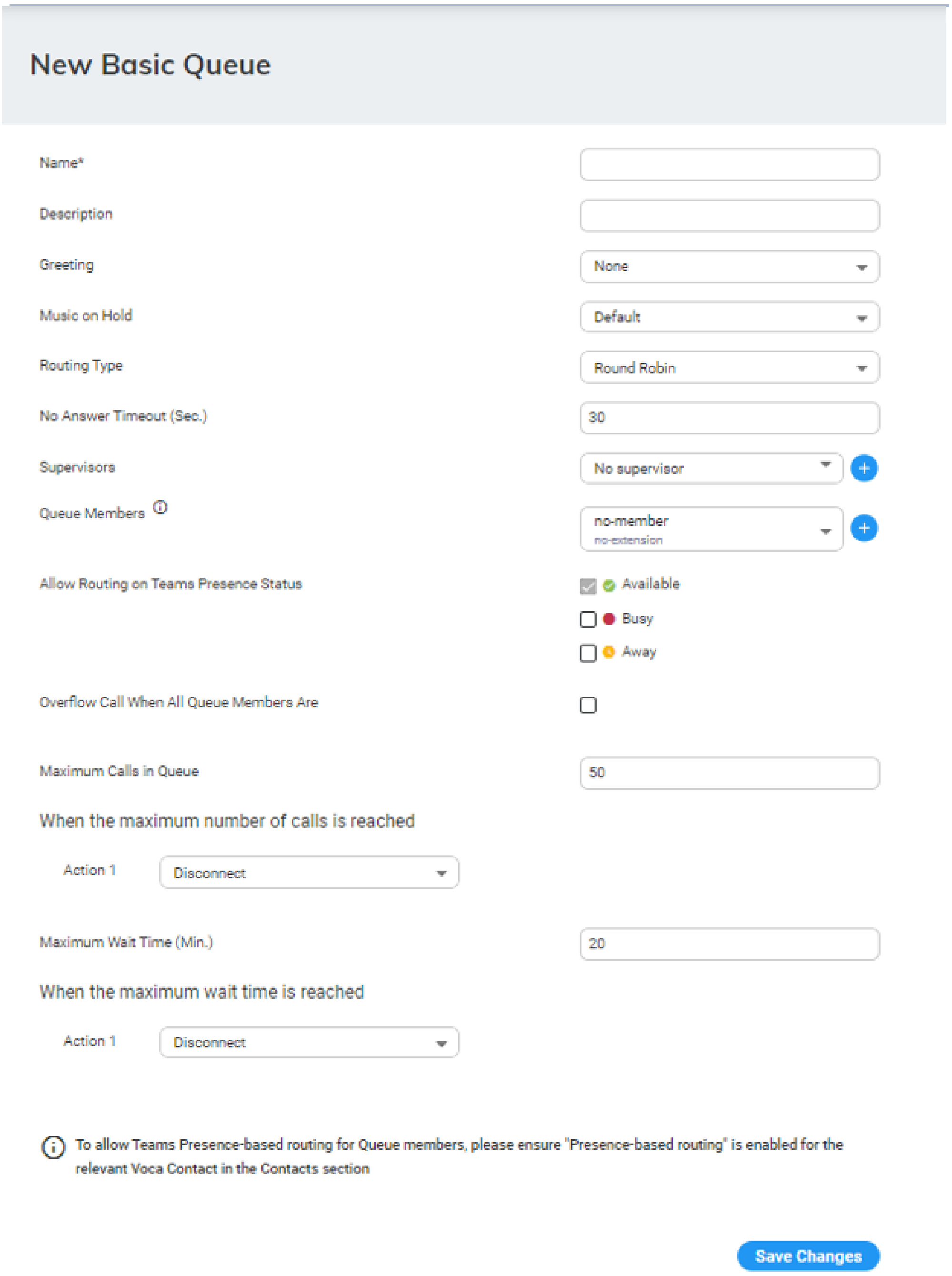
1. Open the Call Queues page (**Configuration** > **Routing > Queues**); the following appears:



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



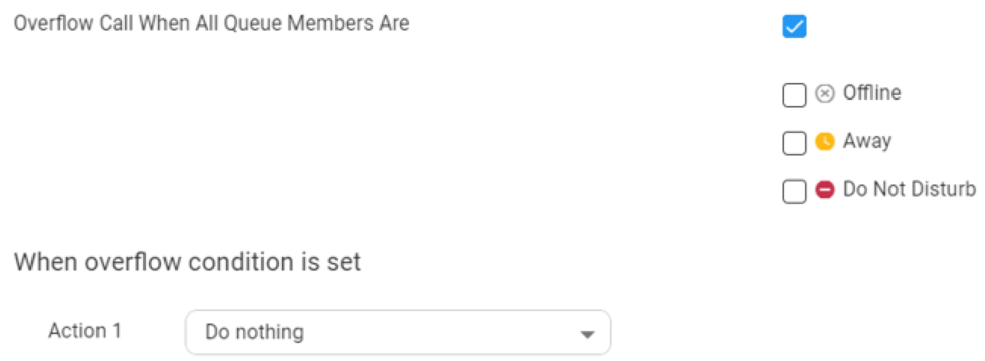
3. Click **Add Queue**; the following appears:



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

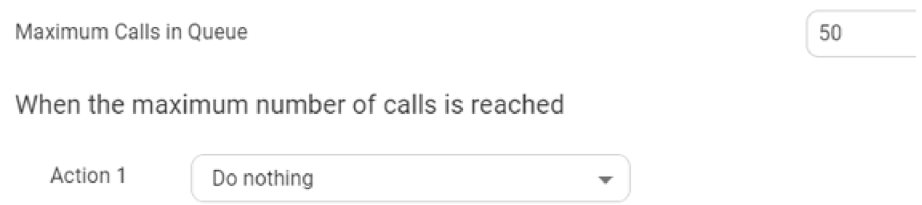
- **Broadcast:** Simultaneously ring for all the queue members

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'.



For more information of the possible Actions, see Actions.

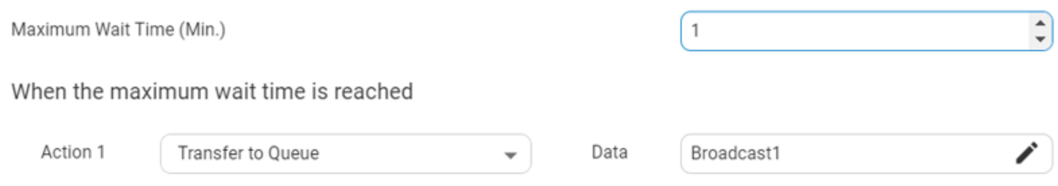
14. In the 'Maximum Call in Queue' field, enter the maximum number of calls that can wait in the queue (between 1 to 99). When the maximum number of calls has been reached, the caller will automatically transfer to the relevant action that configured in the 'When the maximum number of calls is reached'.



For more information of the possible Actions, see Actions.

This limit requires the same or higher licensed channels.

15. 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.



For more information of the possible Actions, see Actions.

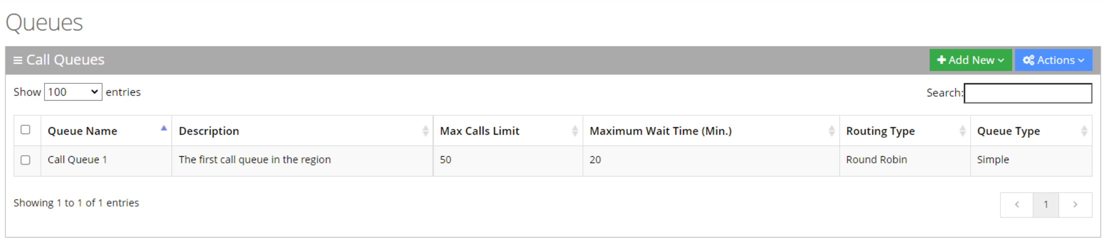
16. Click **Save Changes**.

Editing a Call Queues

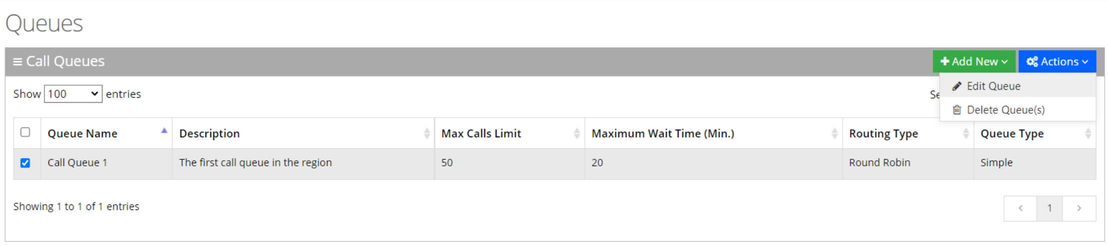
The procedure below describes how to edit a Call Queue.

➢ To edit a Call Queue:

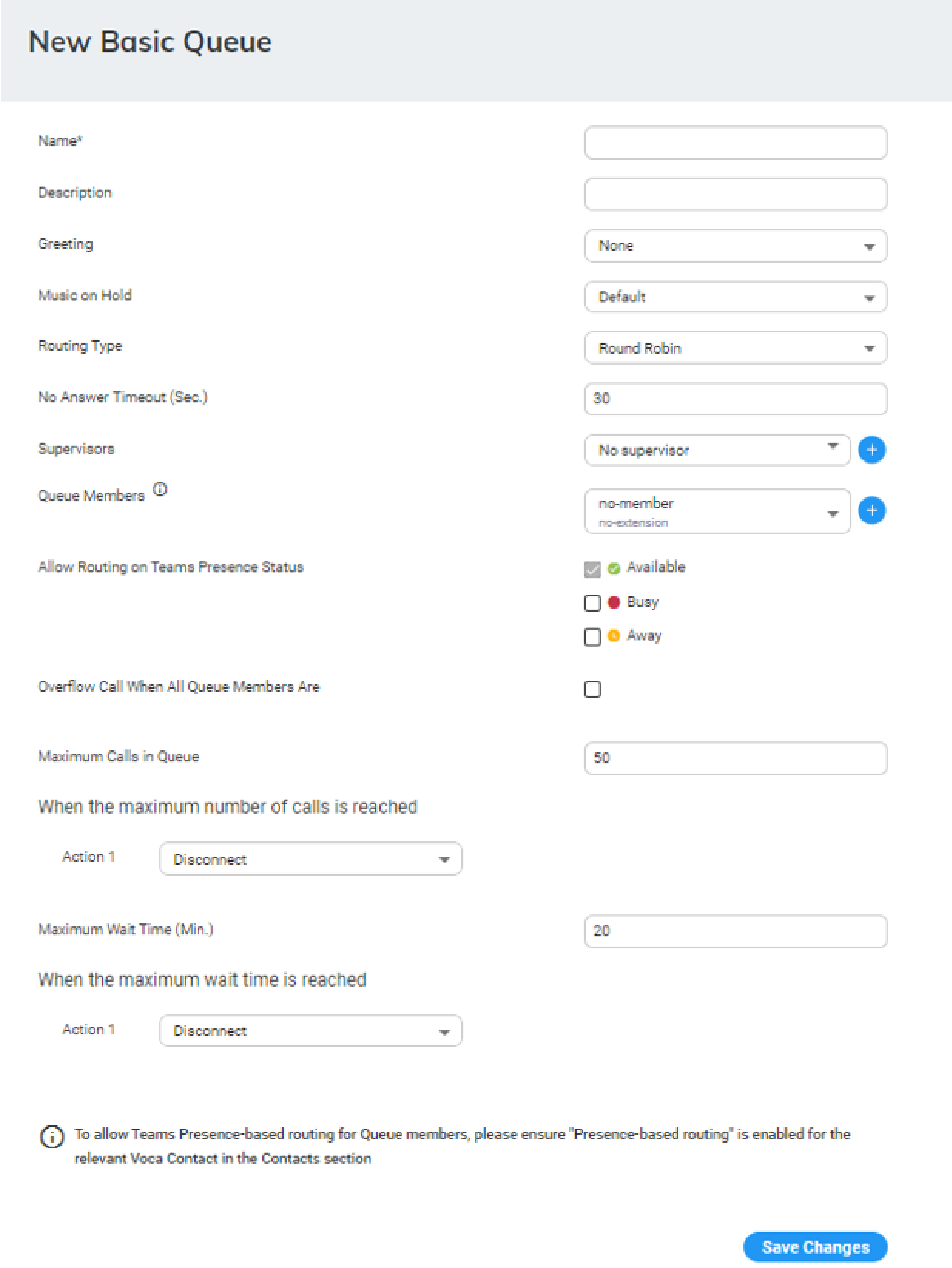
1. Open the Call Queue page (**Configuration** > **Routing** > **Queues**); the following appears:



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



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



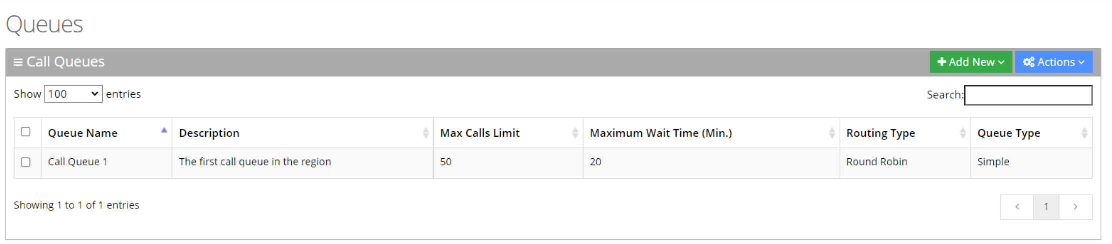
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Call Queue

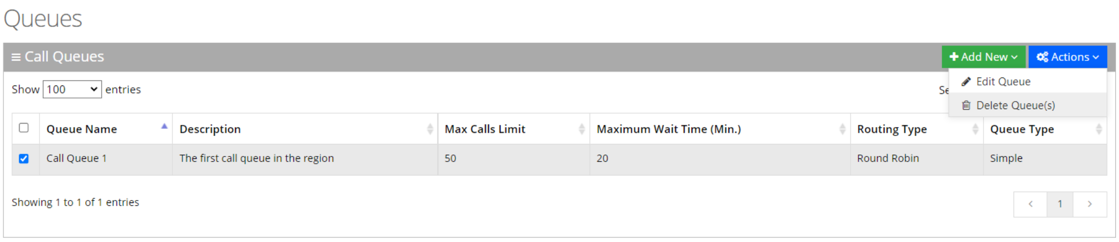
The procedure below describes how to delete a Call Queue.

➢ To delete a Call Queue:

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



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)**.



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

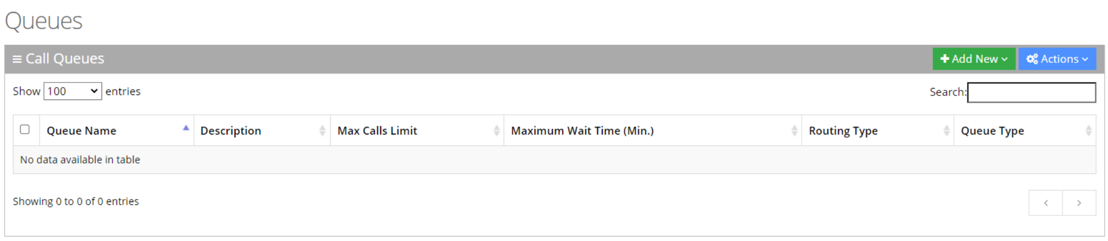
Skill-based Routing Queues provide a method of intelligent routing of callers to Workers when they all registered to the queue to handle caller requests. With this skill-based routing capability, the Administrator can ensure that the call routing strategy, where customers are associated to workers with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

Adding a Skill-Based Routing Queue

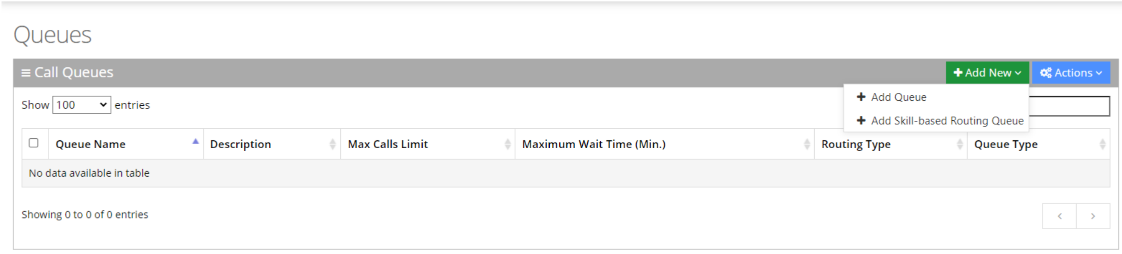
The procedure below describes how to add a new Skill-Based Routing Queue.

➢ To add a new Skill-Based Routing Queue:

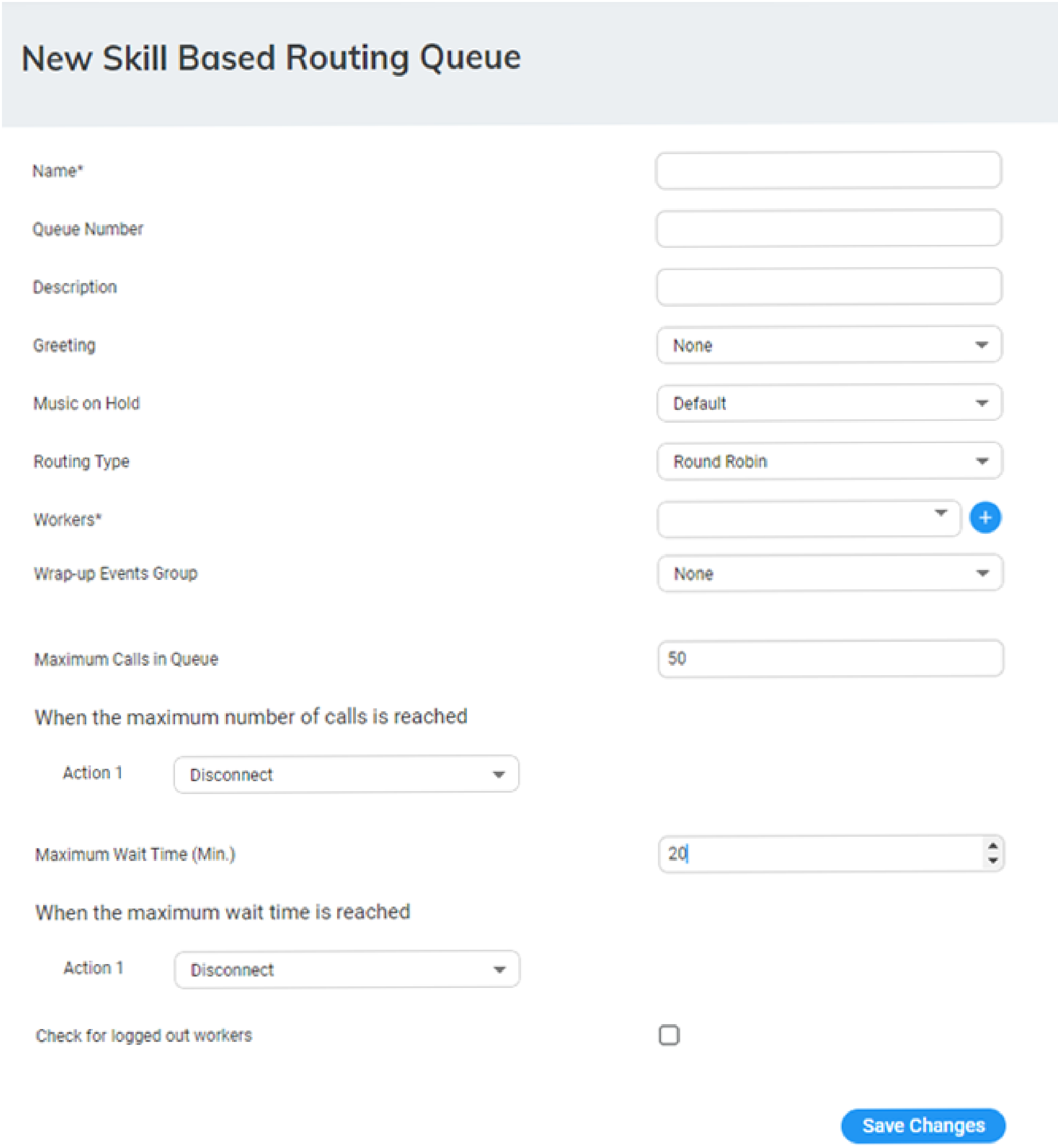
1. Open the Call Queues page(**Configuration** > **Routing > Queues**); the following appears:



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



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



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:

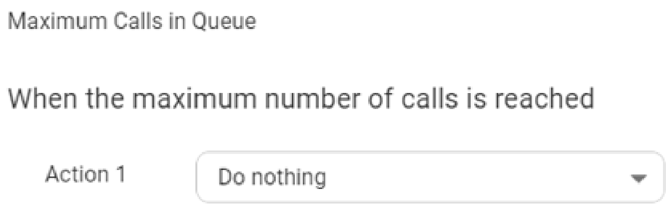
   - **Round Robin (default):** Sequentially hunts for a Worker within the queue.
   - **Longest Available Worker:** Defines the Worker that has been idle for the longest amount of time.
   - **Skill-based Priority Routing:** Routing calls based on the Worker level of expertise (Score level for each skill).

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.

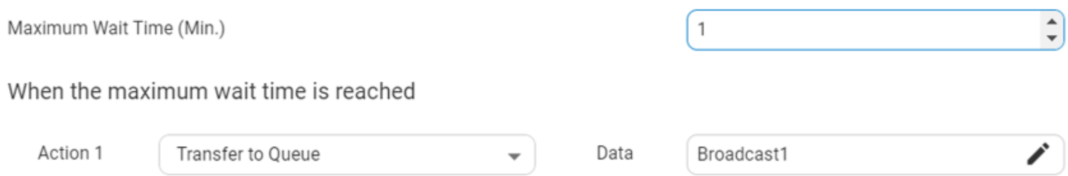
12. In the 'Maximum Call in Queue' field, enter the maximum number of calls that can wait in the queue (between 1 to 99). When the maximum number of calls has been reached, the caller will automatically transfer to the relevant action that configured in the 'When the maximum number of calls is reached".



For more information of the possible Actions, see Actions.

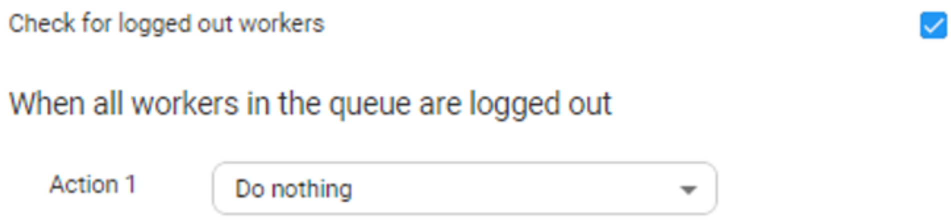
> ⚠ This limit requires the same or more licensed channels.

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.



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.



16. Click **Save Changes**.

Editing a Skill-Based Routing Queue

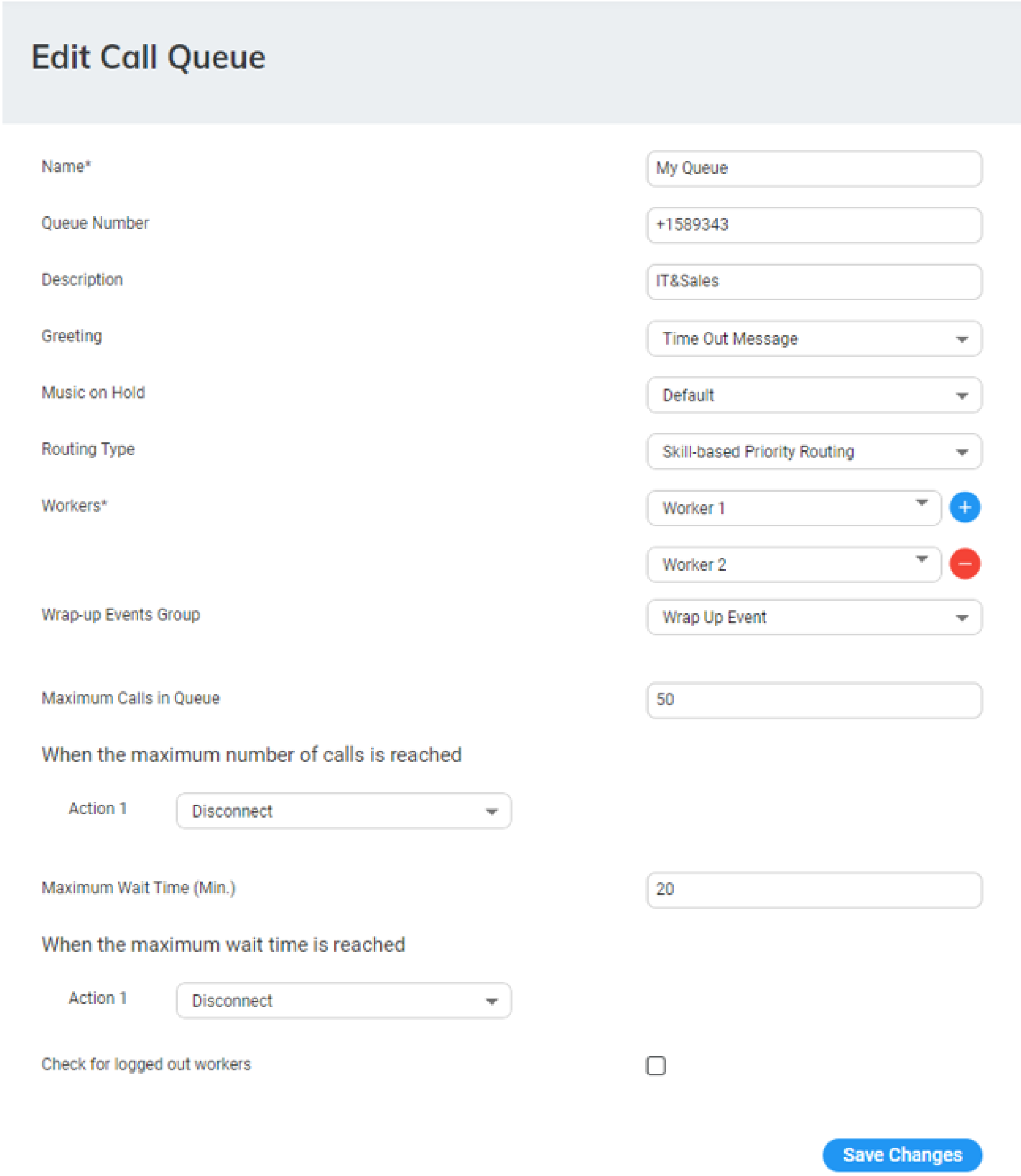
The procedure below describes how to edit a skill-based Routing Queue.

To edit a skill-based Routing Queue:

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

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

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



4. 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:

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

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)**.

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.

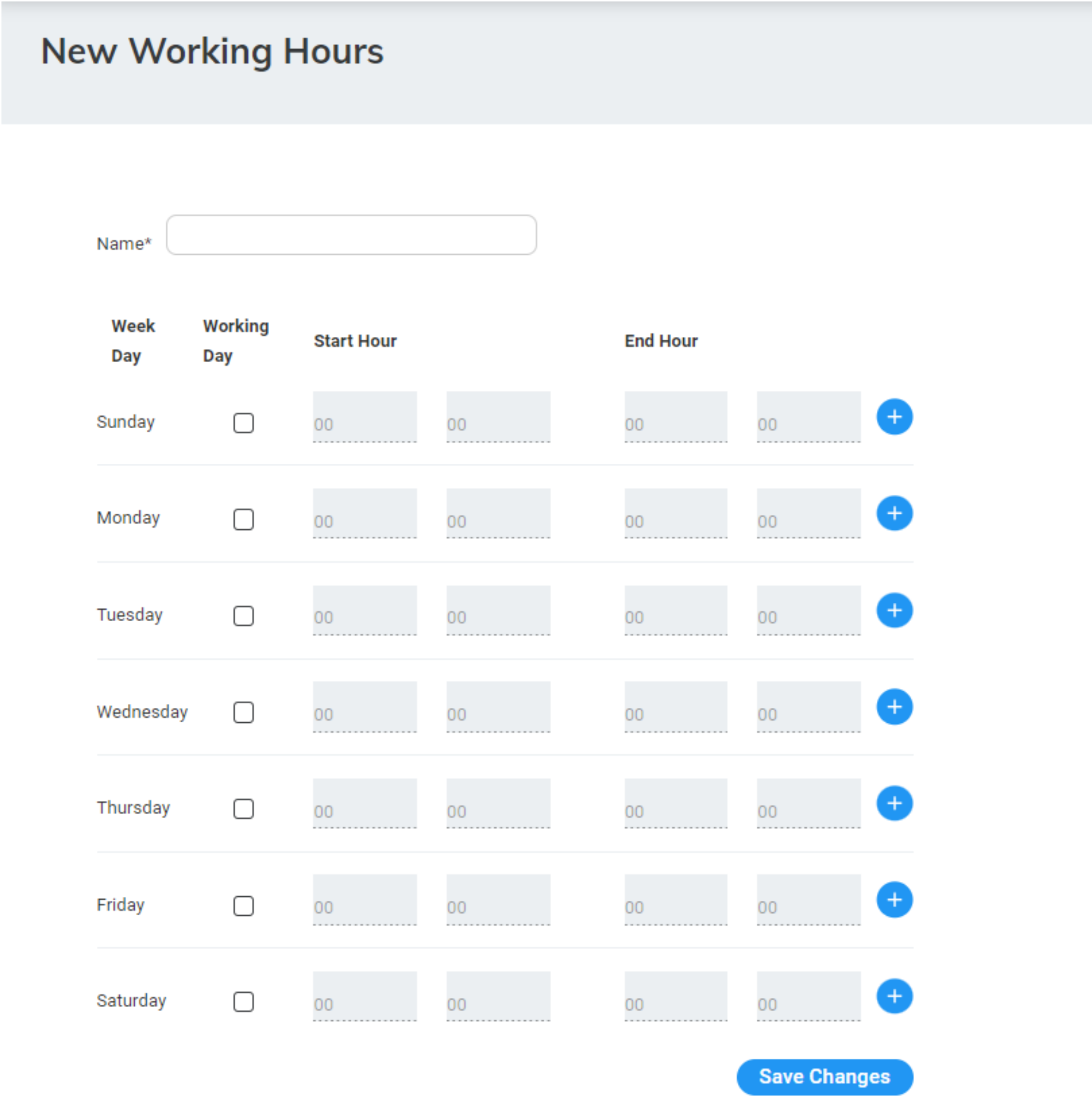
Adding Working Hours Set

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

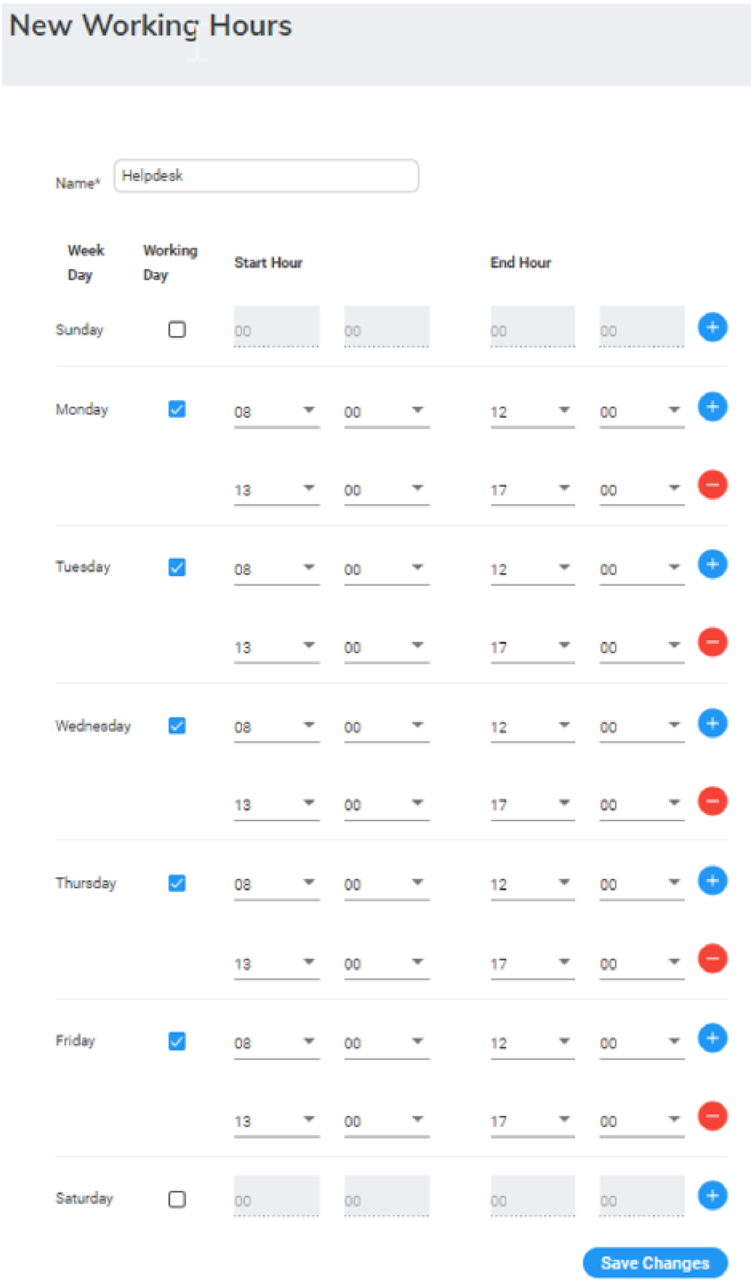
➢ **To add a new Working Hours Set:**

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

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



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.

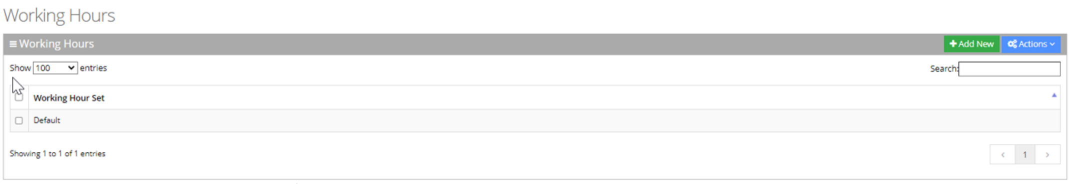


Editing Working Hours Set

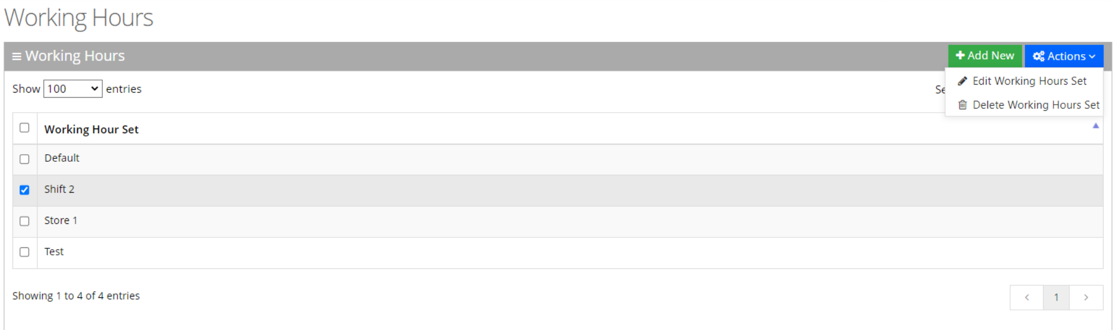
The procedure below describes how to edit a Working Hours Set.

➢ **To edit a Working Hours Set:**

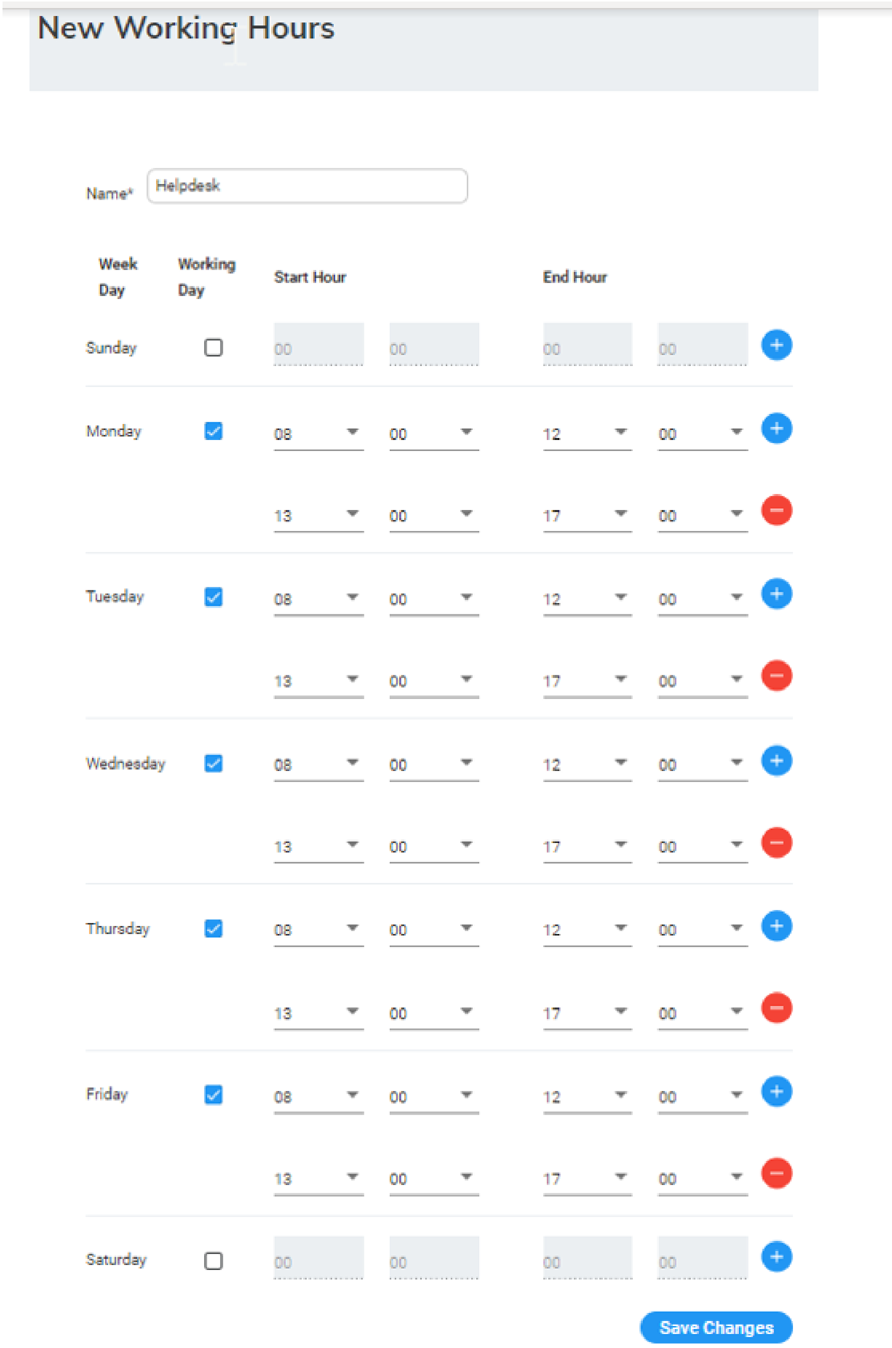
1. Open the Working Hours Details screen (**Configuration** > **Working Hours**); the following appears:



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:



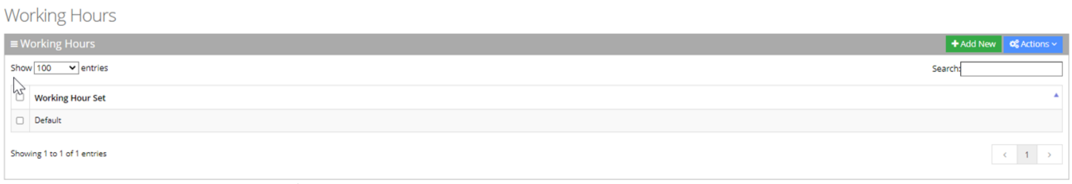
5. Edit the working days and hours, by selecting the check box of each appropriate working day.
6. Edit the 'Start Hour' and 'End Hour' for each applicable day.
7. Click **Save Changes**.

Deleting Working Hours Set

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

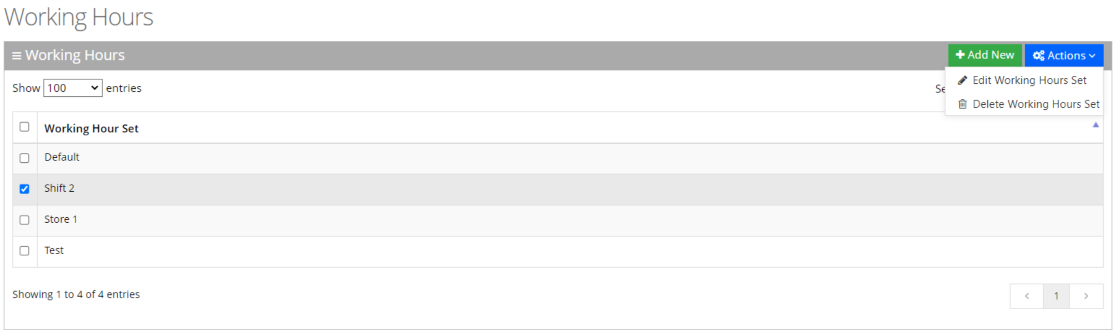
➢ To delete a Working Hours Set:

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.

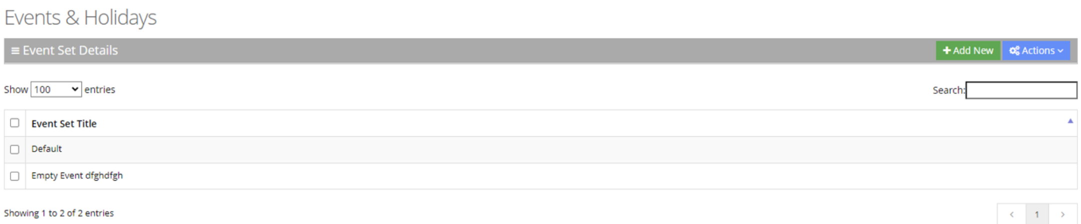
Defining Events and Holidays

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.

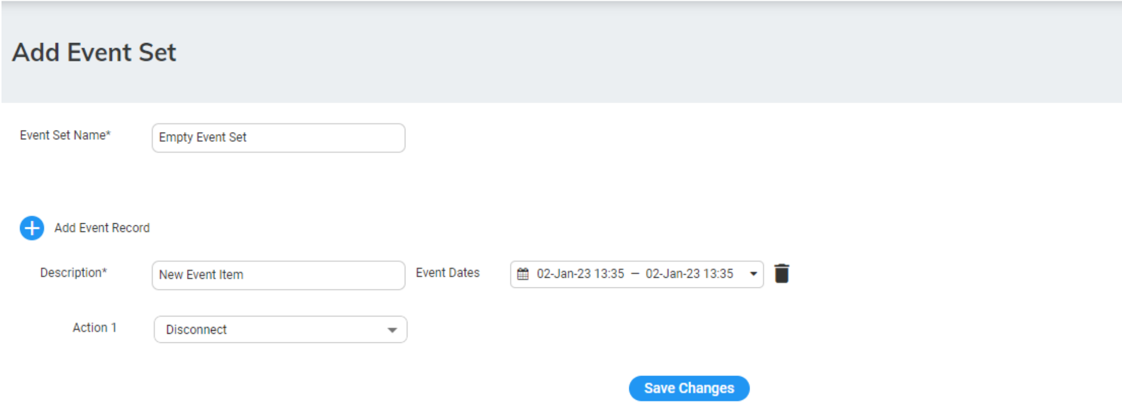
Adding Events and Holidays

➢ To add events and holidays:

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



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



3. In the 'Event Set Name' field, enter name of the event set.
4. Add a new event by clicking .
5. In the ' Description' field, enter the event description.
6. In the 'Event Dates' field, enter the Start and End times for the event.
7. From the 'Actions' drop-down list, select the appropriate actions.
8. For more information of the possible Actions, see Actions.
9. Click the delete icon to delete an event.
10. Click **Save Changes** to confirm your details; A "New event successfully created" message appears.

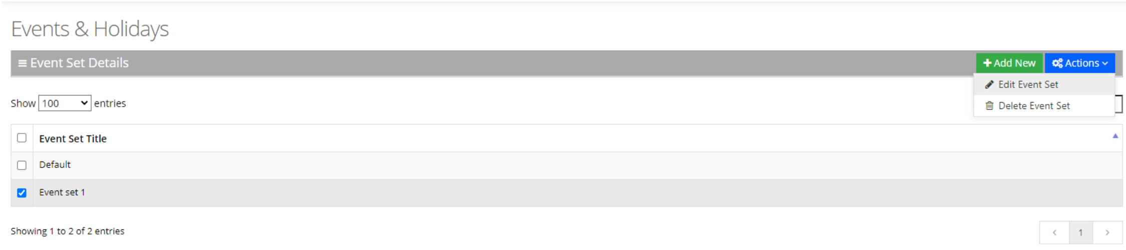
Editing Events and Holidays

The procedure below describes how to edit Events and Holidays.

➢ To edit Events and Holidays:

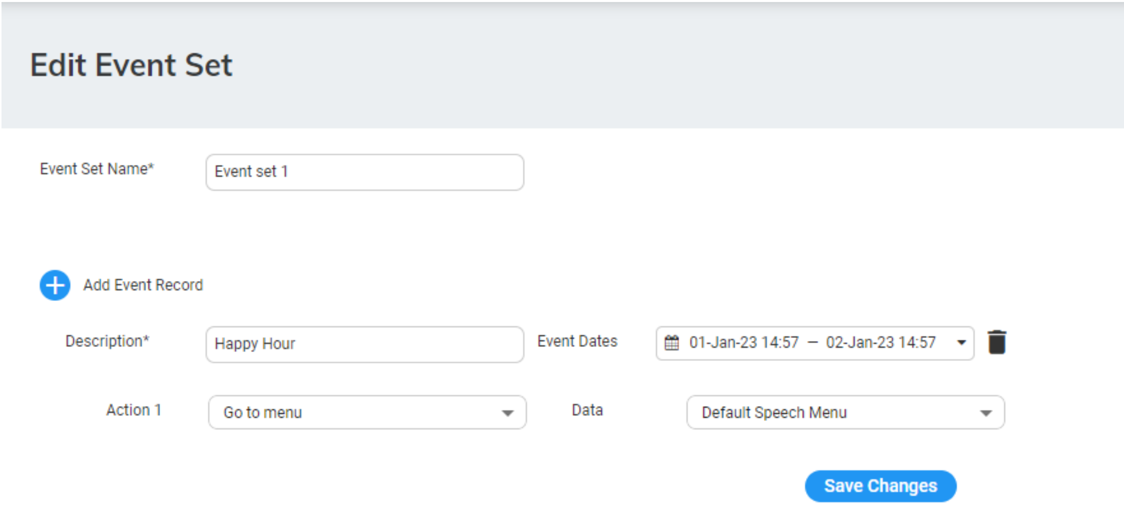
1. Open the Telephony Settings screen (**Configuration** > **Events & Holidays**).
2. Select the event or holiday that you wish to edit.
3. Click **Actions**; the following appears:

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

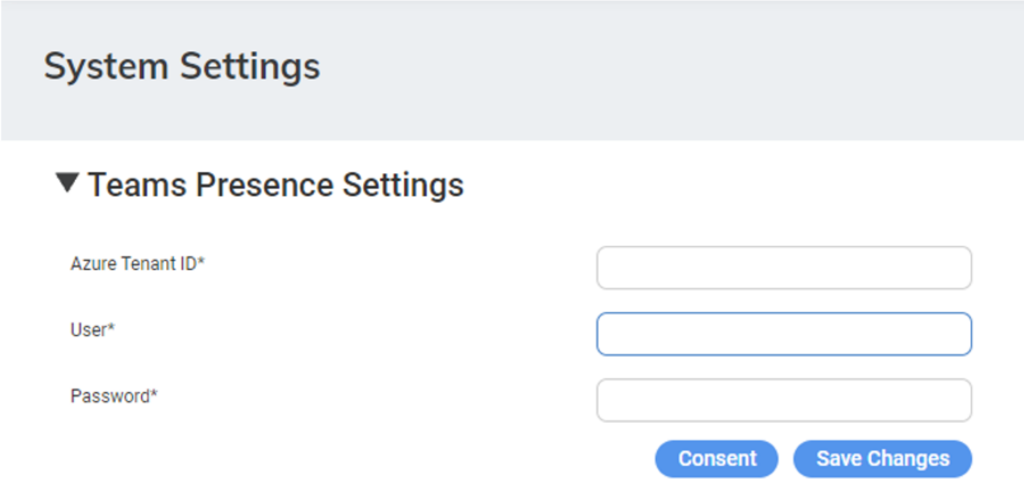
To get the presence of Azure tenant users, the application should get permissions for accessing this information.

This process requires:

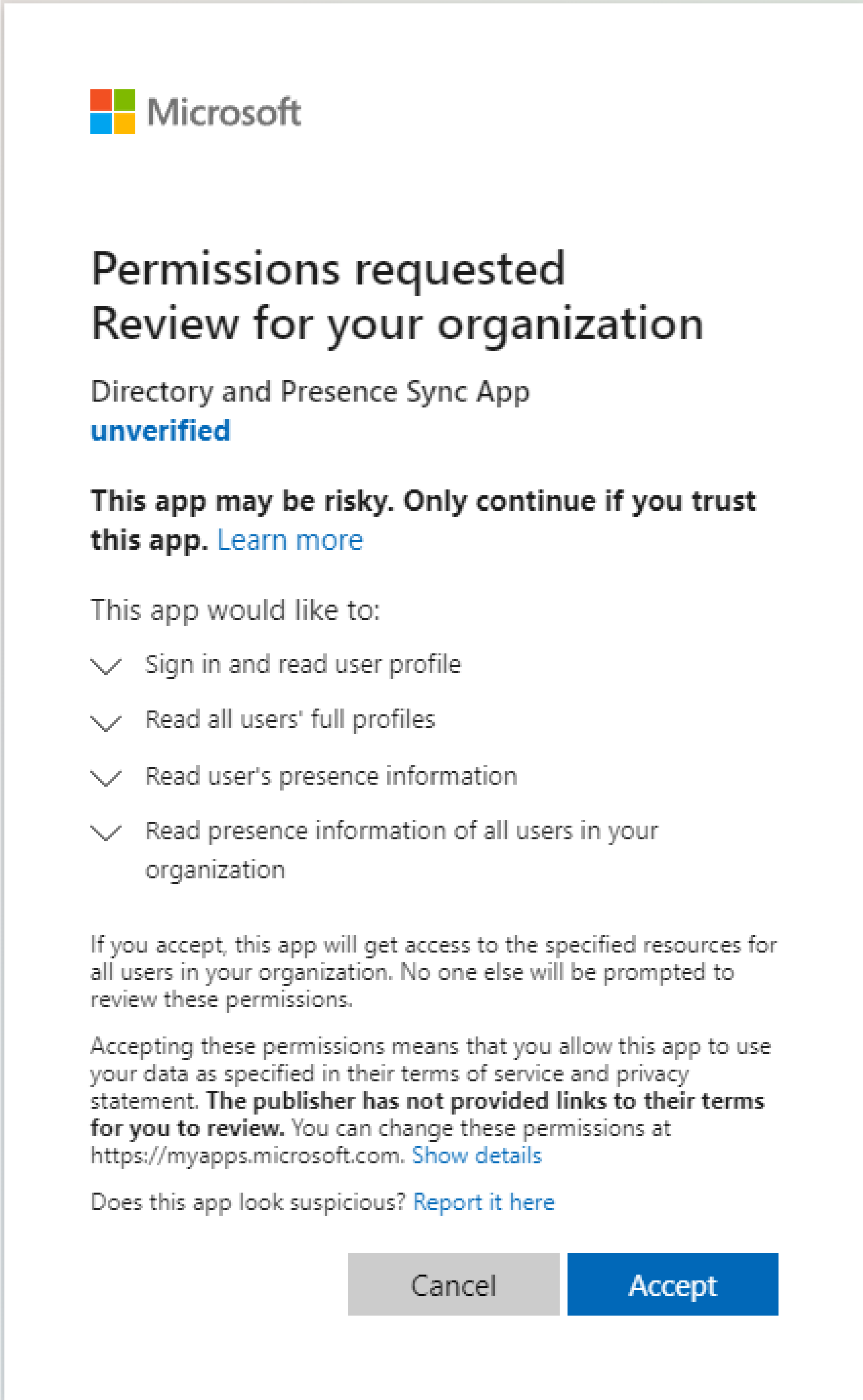
- The organization Administrator (Microsoft 365) should grant tenant-wide Administrator consent to the Directory and Presence application on behalf of the organization.
- Users with global Administrator privileges or users that assign to the Directory and Presence application, created in the consent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

➢ **To obtain permissions:**

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



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:



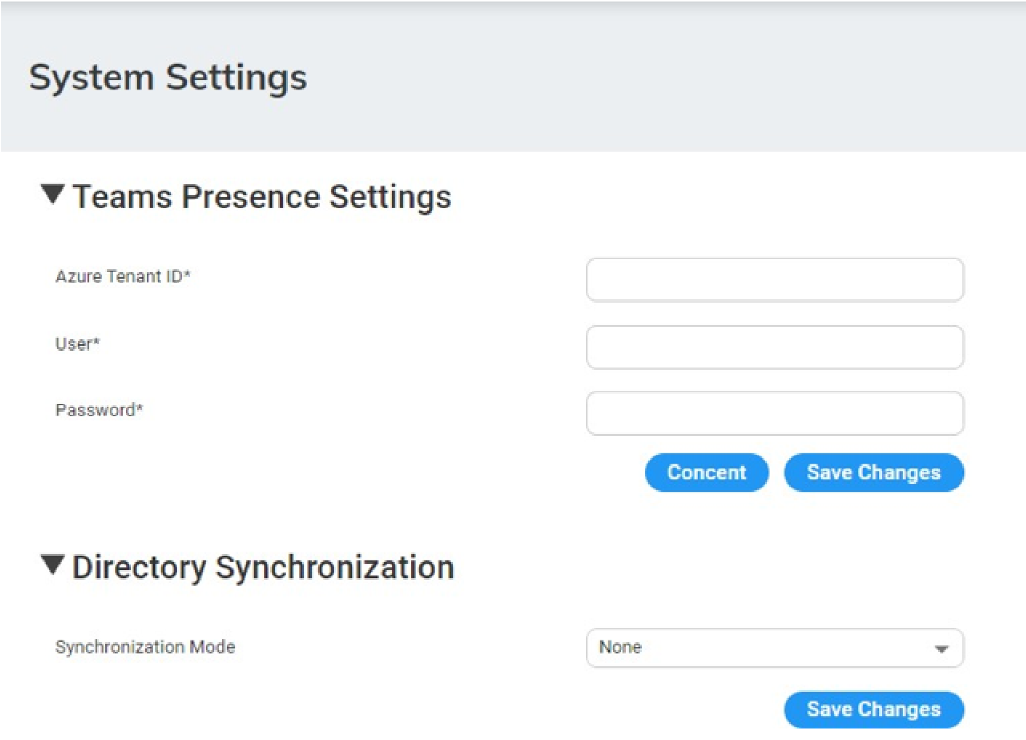
7. Click **Accept**; the access permission to the Azure Active Directory (AD) and presence for Azure tenant is enabled, so Voca can access it.

Directory Synchronization

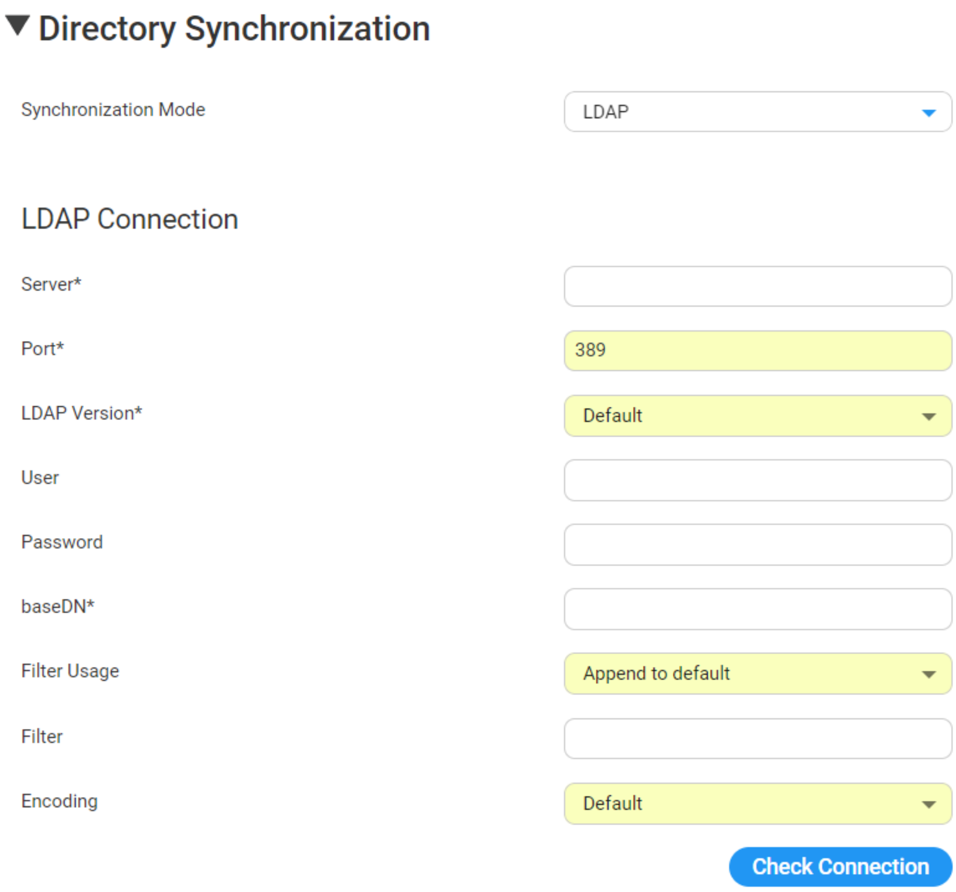
The procedures below describe how to configure Azure Active Directory (AD) and Lightweight Directory Access Protocol (LDAP) synchronization.

➢ **To configure LDAP:**

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



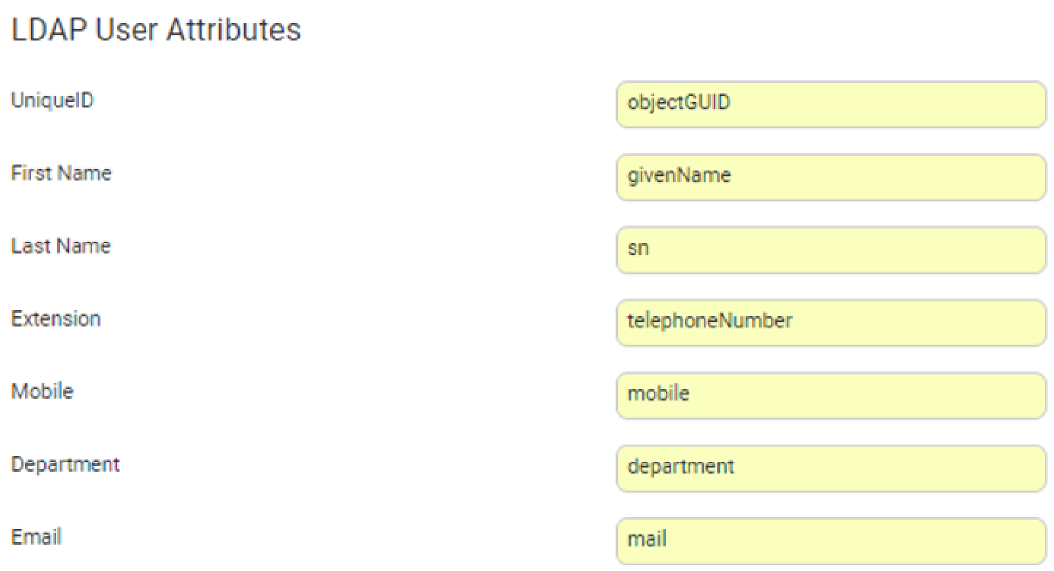
2. Under the **Directory Synchronization** group, from the 'Synchronization Mode' drop-down list, select **LDAP**; the following appears:



3. In the 'Server' field, enter the URL of the LDAP server. It can include either FQDN or an IP Address.
4. In the 'Port' field, enter the port that synchronizes with LDAP. Enter either "398" or "3268".
5. From the 'LDAP Version' drop-down list, select the LDAP Version.
6. In the 'User' field, enter the Service Administrator Name.
7. In the 'Password' field, enter the Service Administrator password.
8. In the 'baseDN' field, define the baseDN that you want to use.
9. 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.
10. In the 'Filter' field, define the filter that you want to use. For more information, click here.
11. From the 'Encoding' drop-down list, select the appropriate encoding to be used when importing from the LDAP filter.

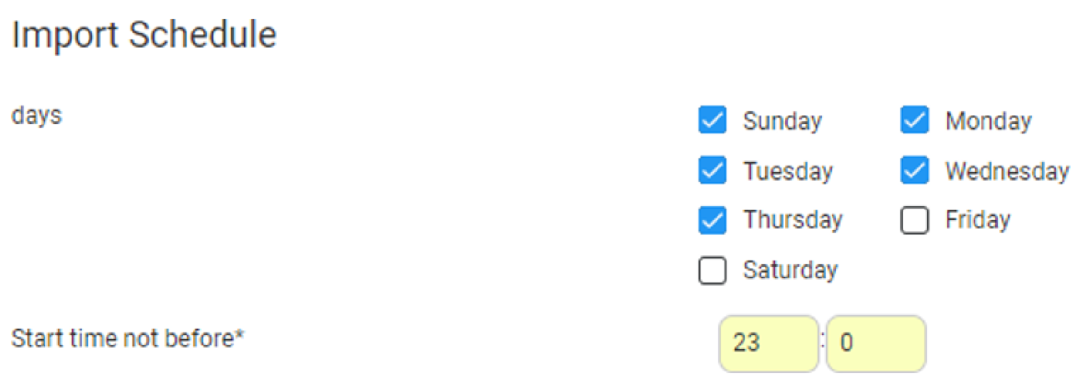
To check connectivity to the LDAP server, click the **Check LDAP connection** button.

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

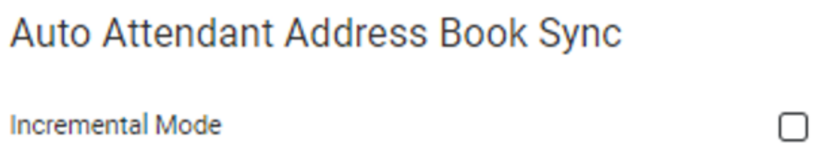


13. Select the following fields when you want to import contacts from the Azure AD server:

- Days
- Start Time



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).



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

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

➢ **To configure Azure AD:**

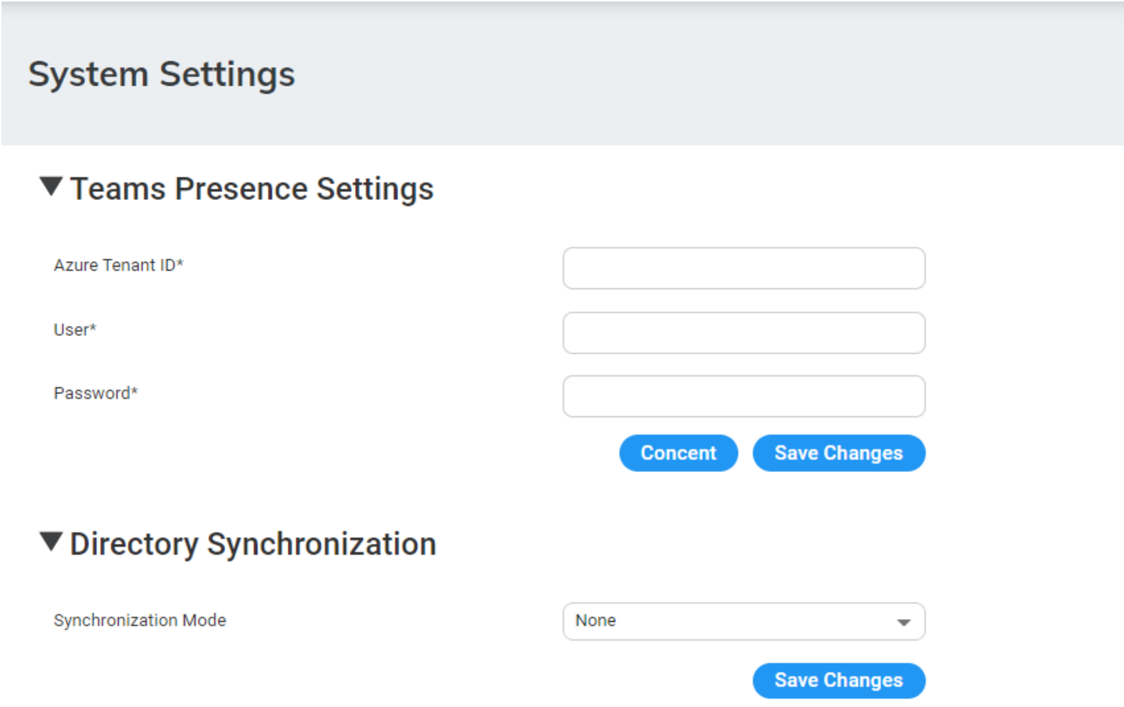
This process requires the following:

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

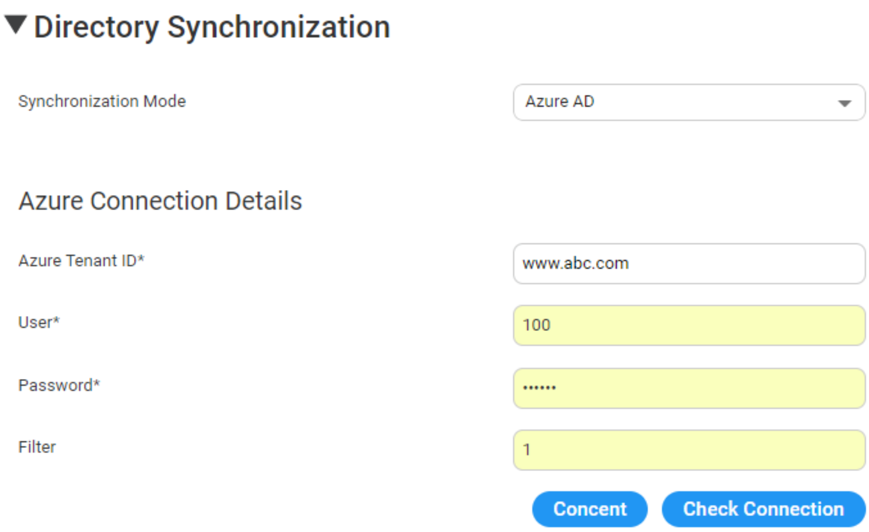
> ⚠ The consent process needs to be made once for Azure AD sync and Teams Presence.

- 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:



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



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:

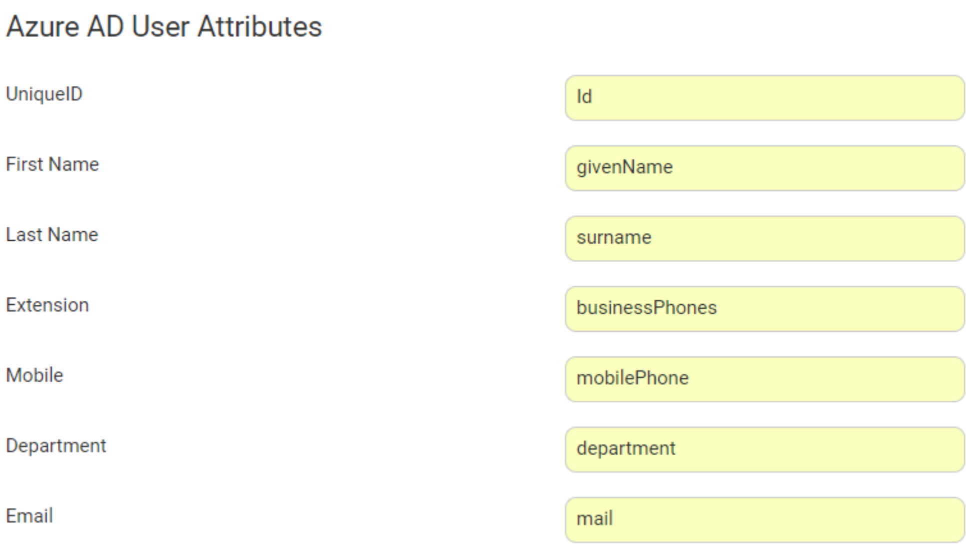
```
"(startsWith(givenName, 'V') OR endsWith(mail,'@outlook.com'))
AND businessPhones/any(p:p le 'a') AND surname ne null and NOT
(surname eq 'Last')"
"department in ('Retail', 'Sales') AND givenName le 'zzz' AND
mobilePhone ge '9'"
```

7. Click **Consent**.

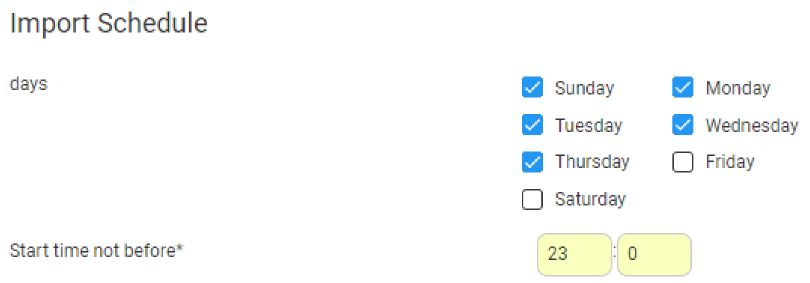
> **Operators:** 'Contains', 'lt' and 'gt' are not supported. For more information, refer to https://docs.microsoft.com/en-us/graph/aad-advanced-queries?tabs=http.

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

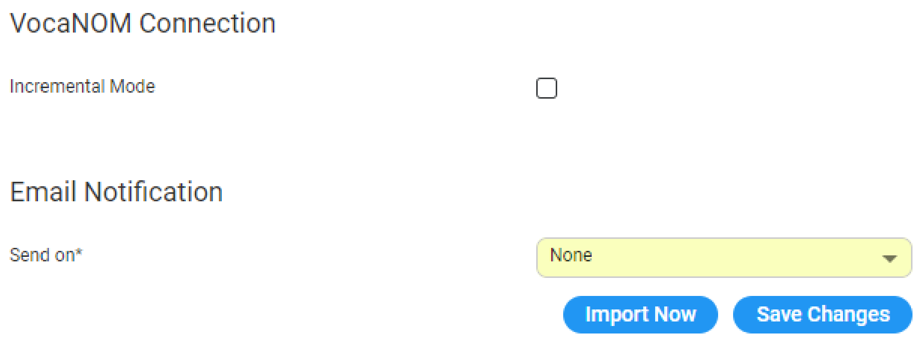
8. Under the **Azure AD User Attributes** group, enter the following:
   a. In the 'Unique ID' field, enter "Id".
   b. In the 'First Name' field, enter "givenName".
   c. In the 'Last Name' field, enter "surname".
   d. In the 'Extension' field, enter "businessPhone".
   e. In the 'Mobile' field, enter "mobilePhone".
   f. In the 'Department' field, enter "department".
   g. In the 'Email' field, enter "mail".



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



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).



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:

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

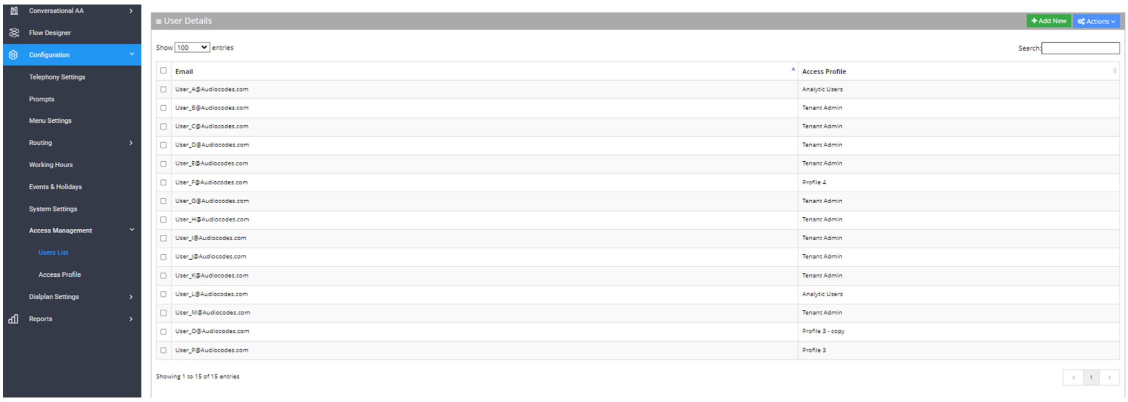
Access Management allows you to add or edit users to view different pages in the Tenant configuration, so that you can share responsibilities more effectively.

Configuring Access Management

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

➢ **To create or edit a user:**

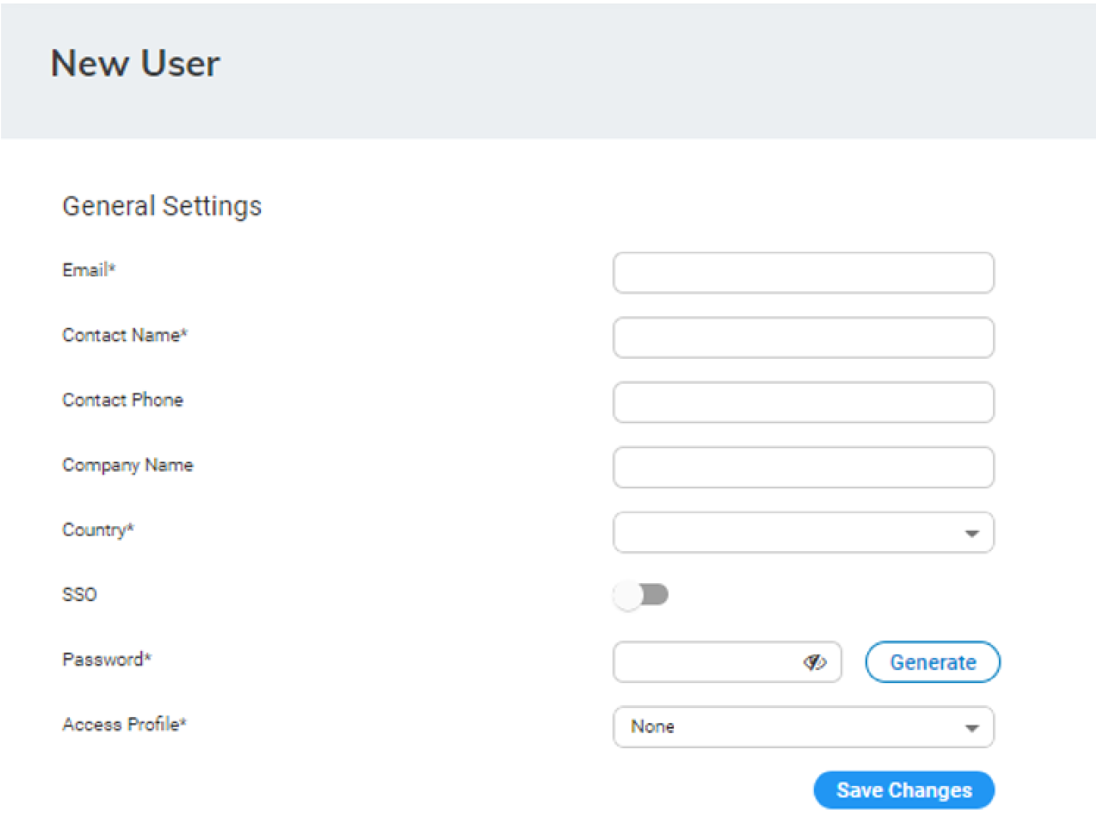
1. Open the User List page (**Configuration** > **Access Management** > **Users List**); the following appears:



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:



The User Configuration is described below:

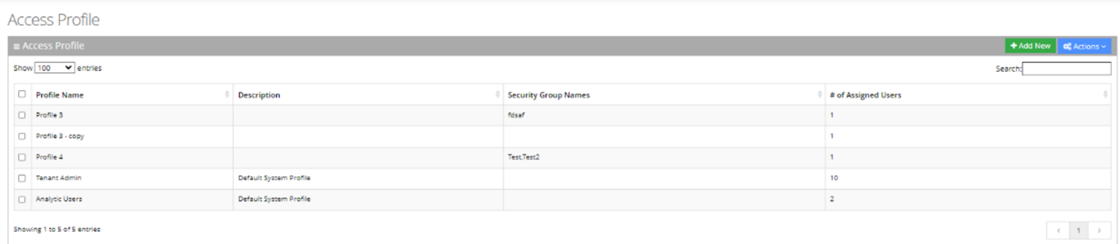
- **Email:** Defines the email address.
- **Contact Name:** Defines the Contact Name.
- **Contact Phone:** Defines the Contact Phone.
- **Company Name:** Defines the Company Name.

- **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:

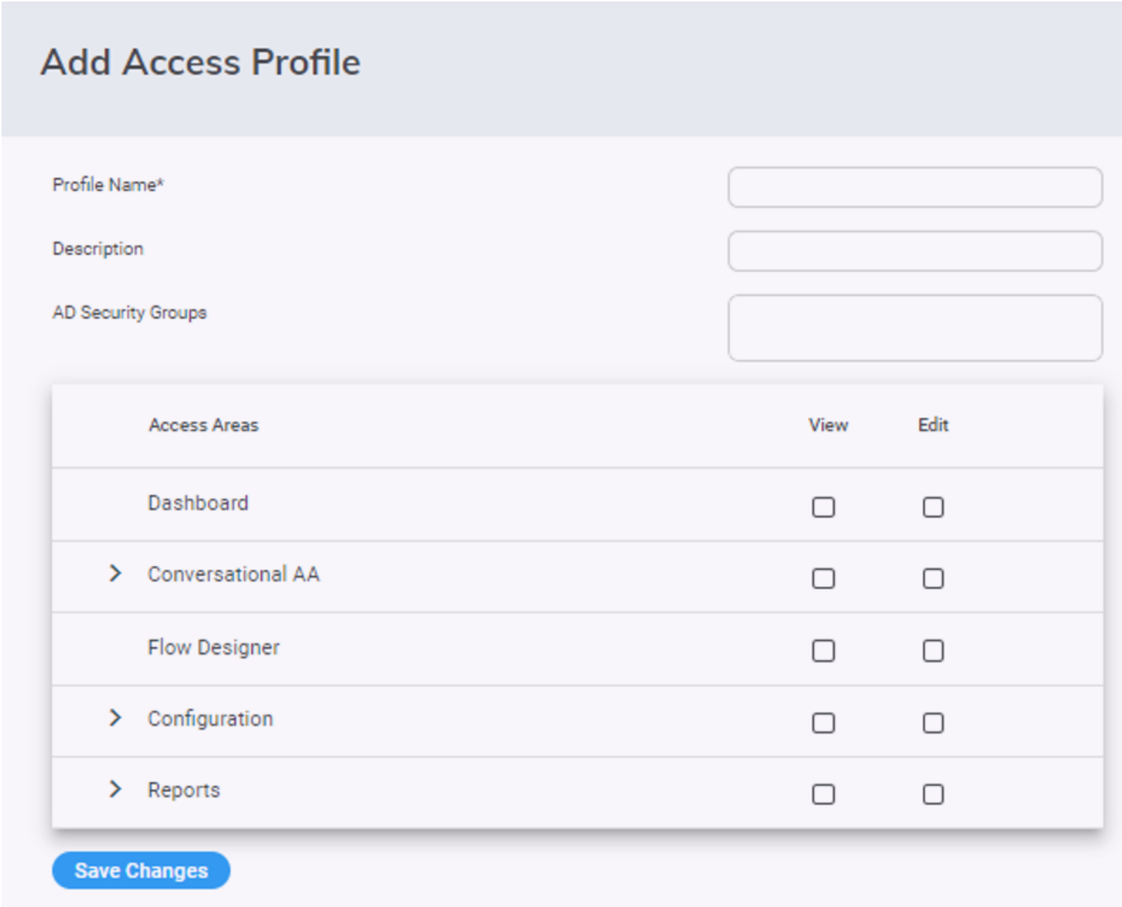
1. Open the Access Profile page (**Configuration** > **Access Management** > **Access Profile**); the following appears:



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:



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.

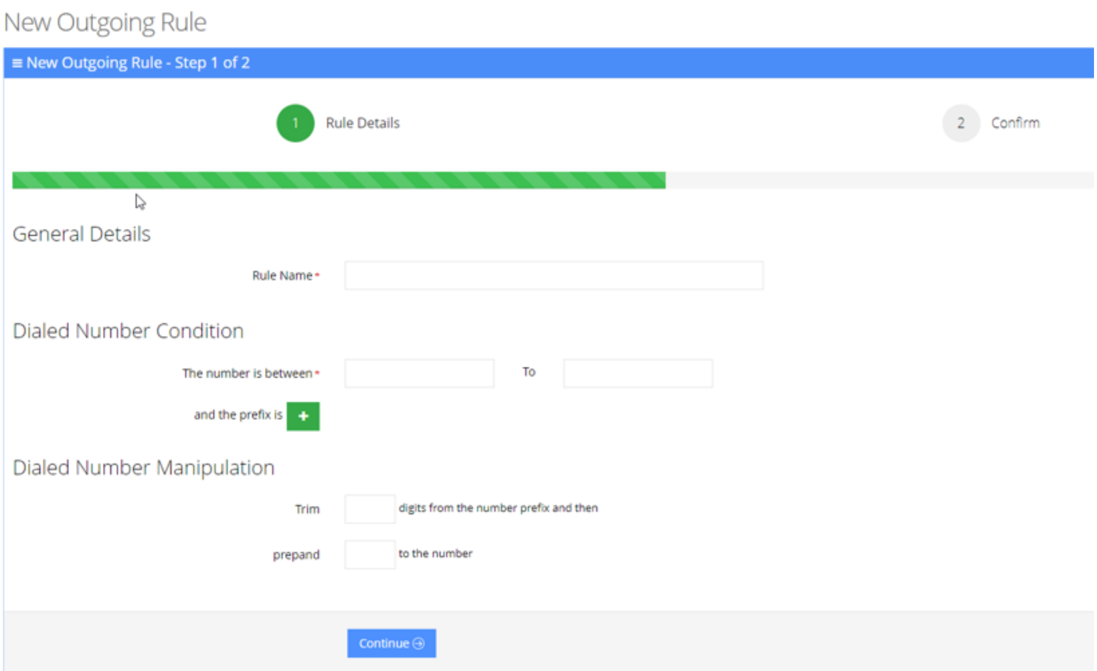
Configuring Outgoing Rules

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.

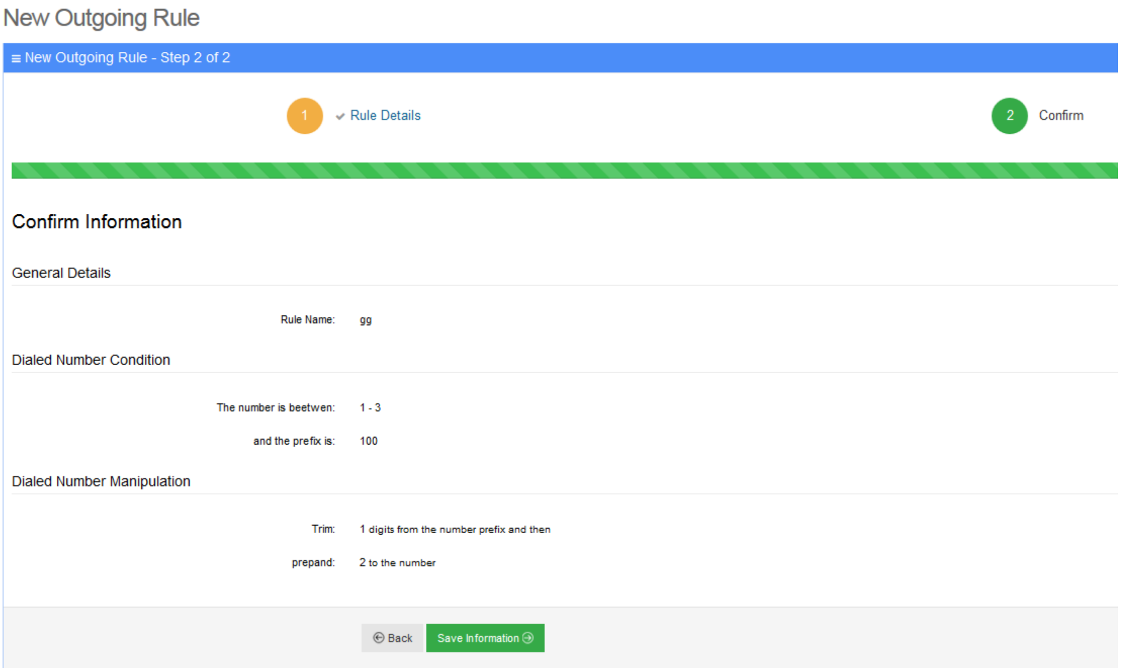
4. Under the Dialed Number Condition group, in the “The number is between” field, enter the number of digits (minimum and maximum) required for the manipulation.

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:



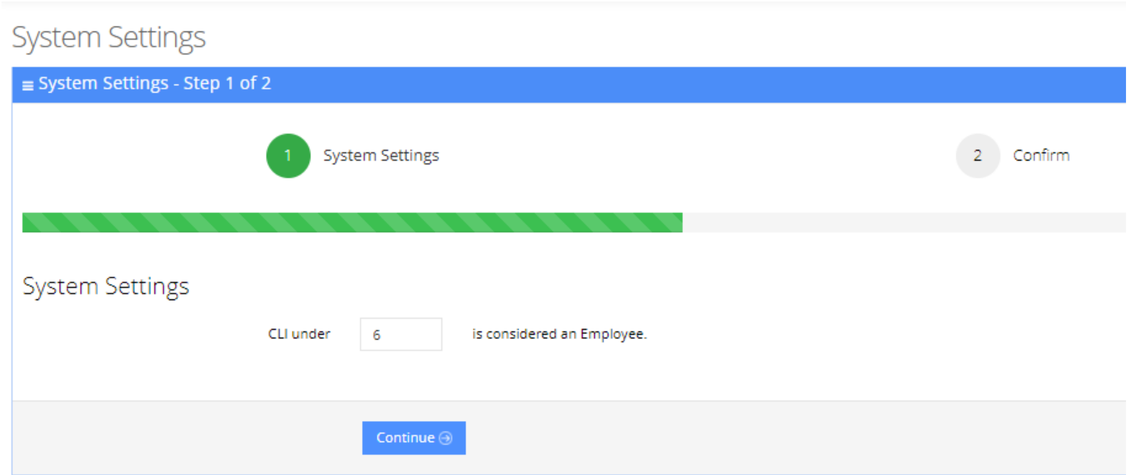
8. Click **Save Information**.

Configuring Incoming Rules

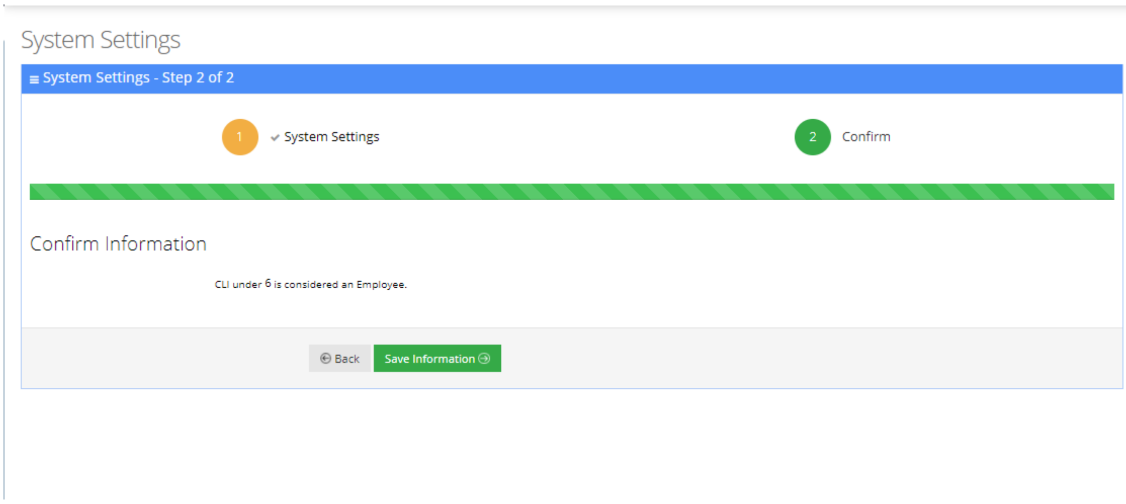
The procedure below defines the length of the Caller ID (CLI) field which is used to determine valid employee numbers.

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

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



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**.



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.

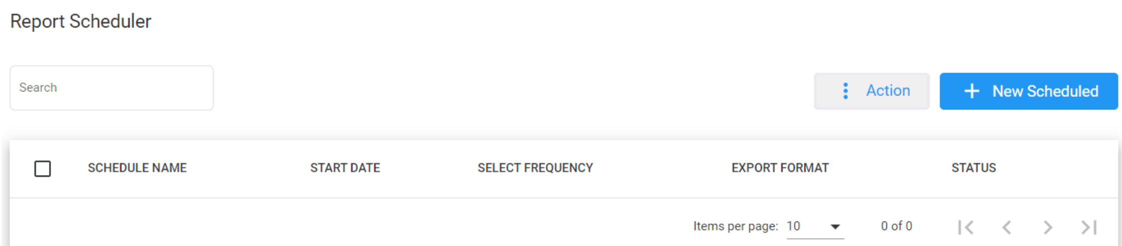
> The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click here.

Adding a Report Scheduler

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

➢ **To add a new Report Scheduler:**

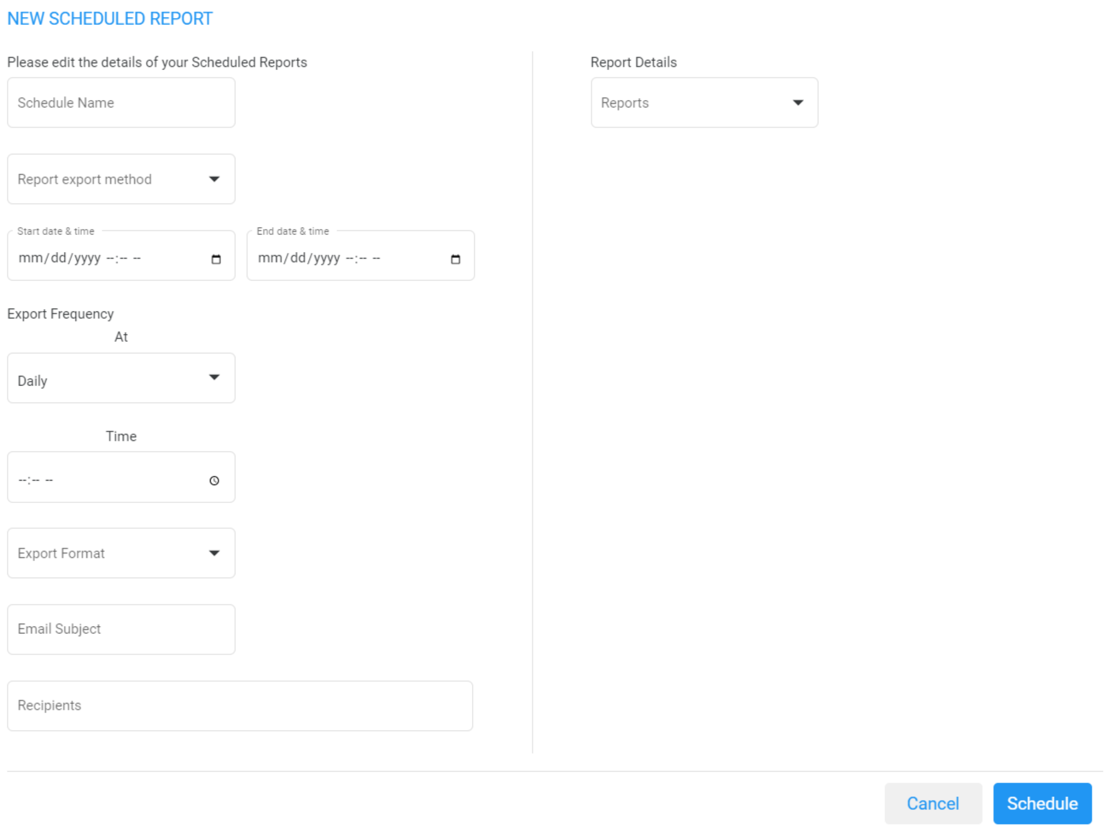
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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:



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.

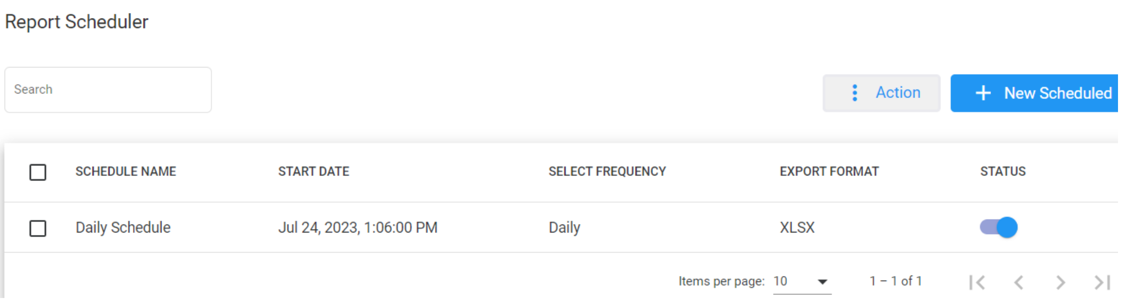
6. Click **Save Changes**.

Editing a Report Scheduler

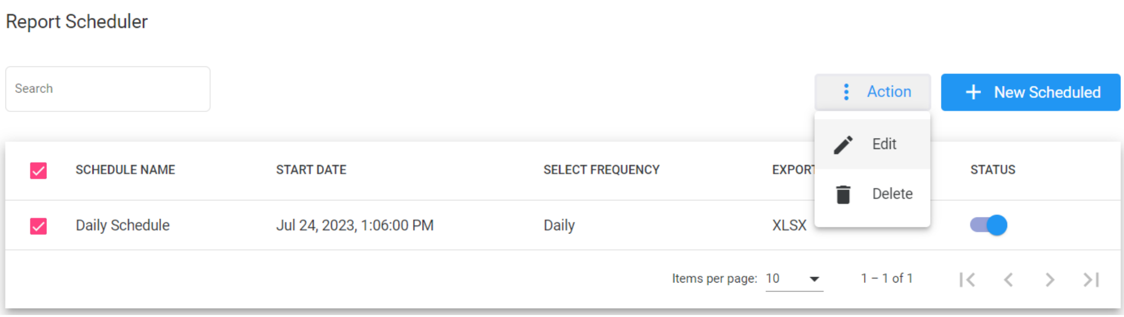
The procedure below describes how to edit a Report Scheduler.

➢ To edit a Report Scheduler:

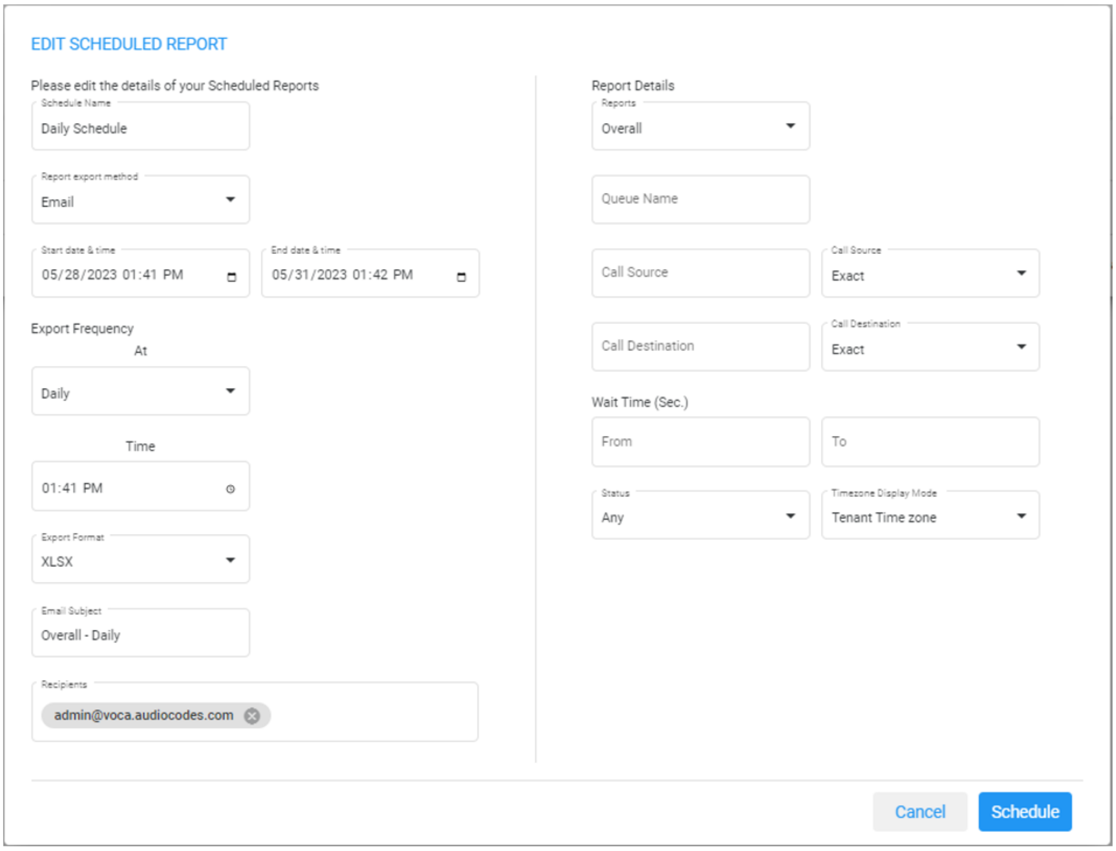
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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



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



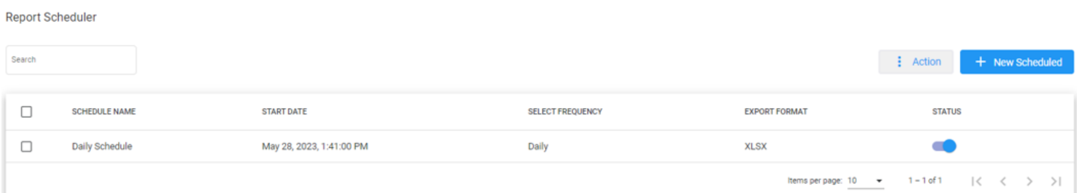
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Delete a Report Scheduler

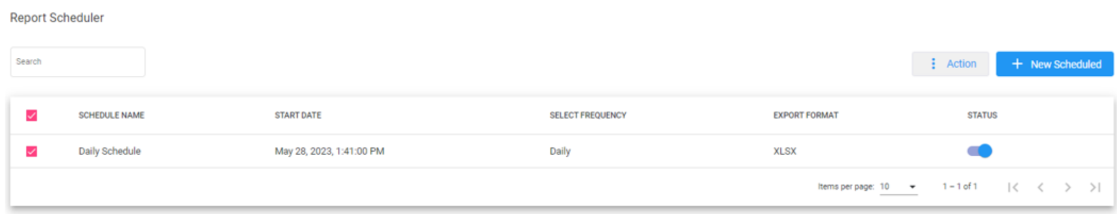
The procedure below describes how to delete a Report Scheduler.

➢ **To delete a Report Scheduler:**

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



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



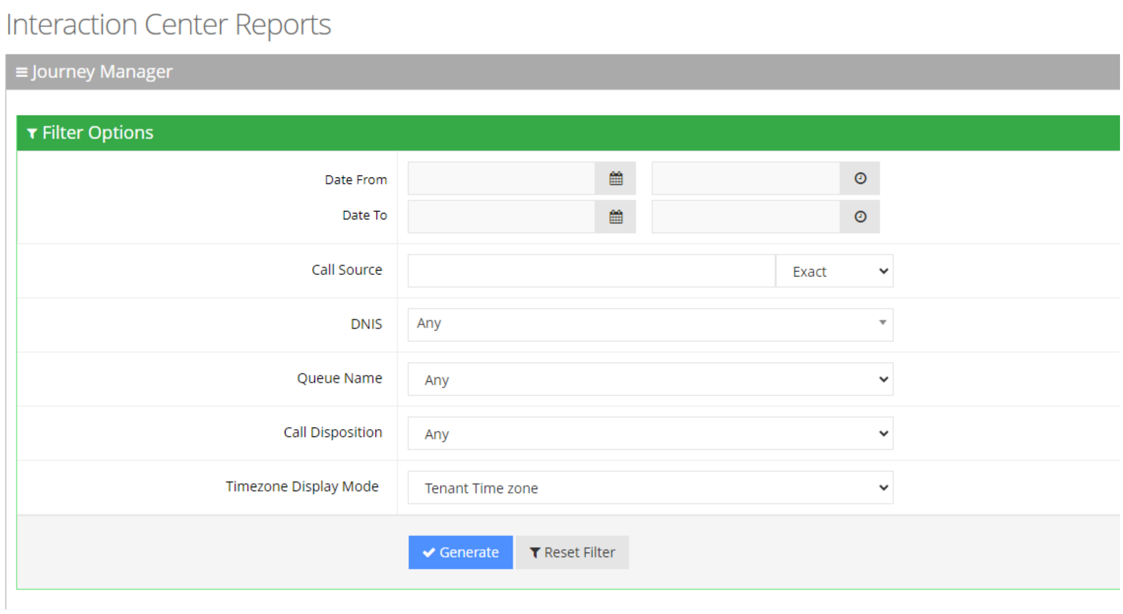
3. From the ‘Actions’ drop-down menu, choose **Delete**.

Journey Manager Report

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

➢ To generate the Journey Manager report:

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

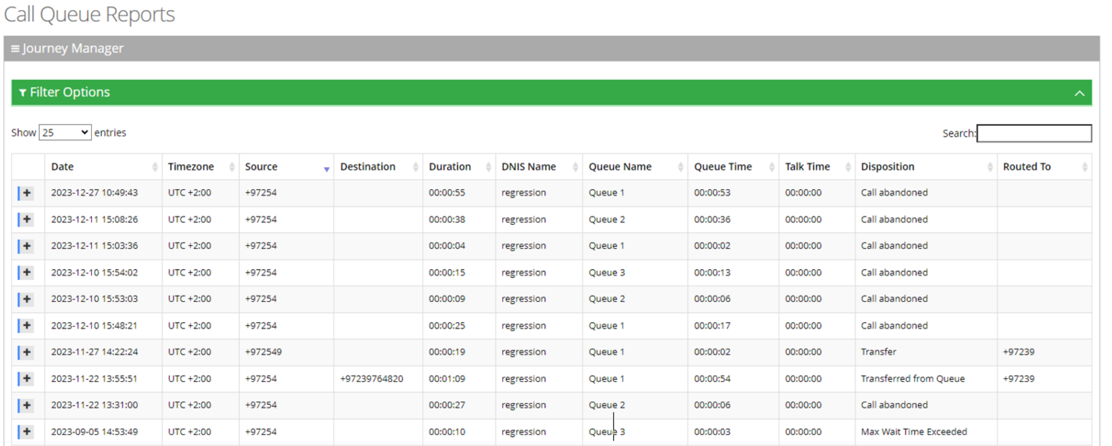


2. Select the appropriate filter fields to generate your report:
   - **Date From:** Displays this report for a specific date/time range.
   - **Date To:** Displays this report for a specific date/time range.
   - **Call Source:** Displays information that is related to a specific source number.
   -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

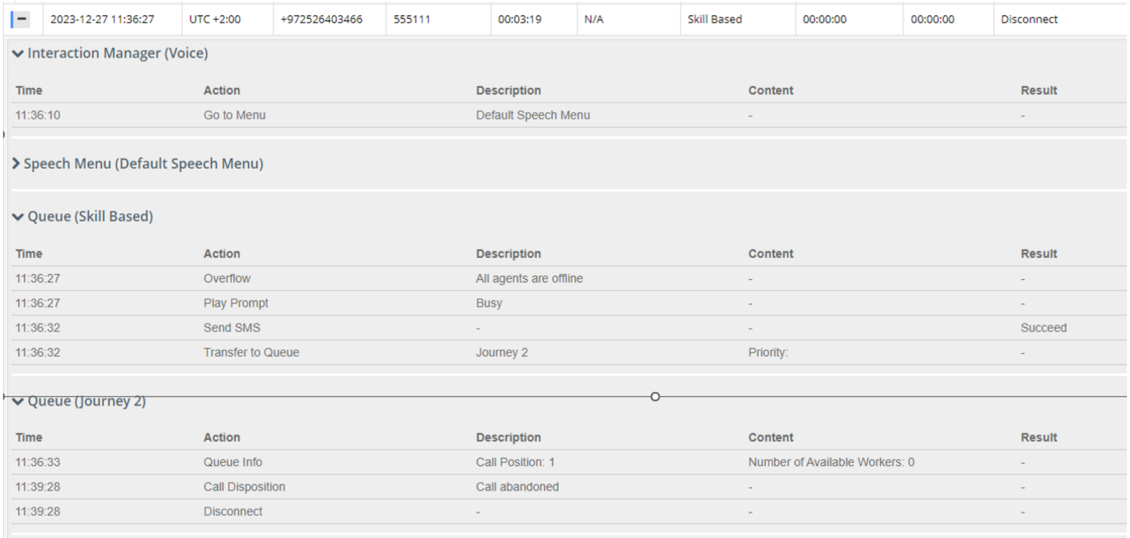
- **Call Disposition:** Defines information that relate to calls that end with a specific disposition or "Any'. For an explanation of the different call disposition, refer to Call Dispositions on page 171.
- **Timezone Display Mode:** Displays this report in different time zones. The time zone of calls 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.



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

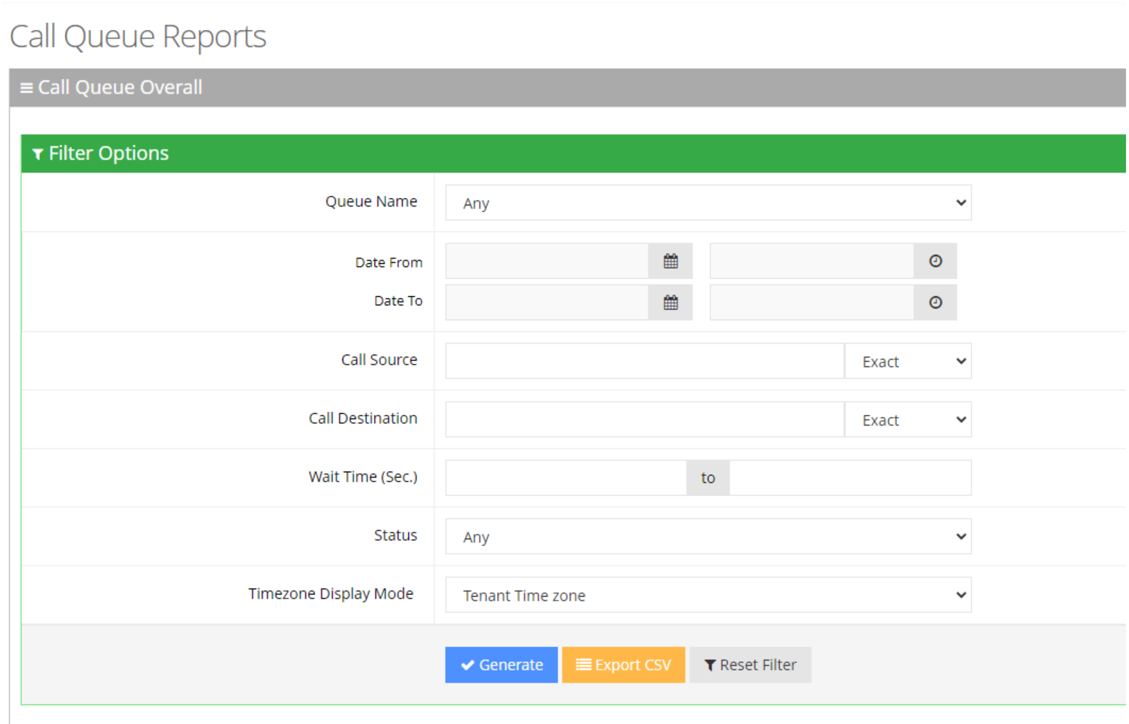


Overall Report

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

➢ To generate an Overall report:

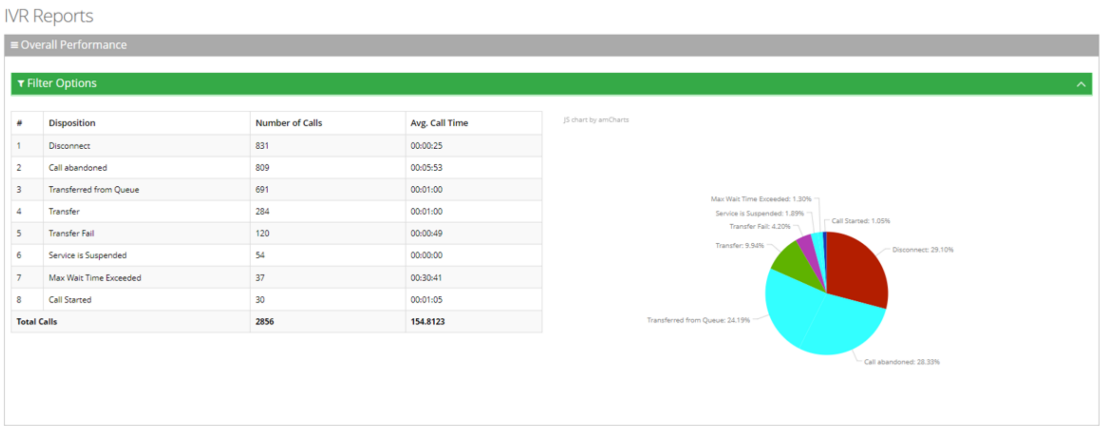
1. Open the Overall Report page (**Reports** > **Call Queues Reports** > **Overall**); the following appears.



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.

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

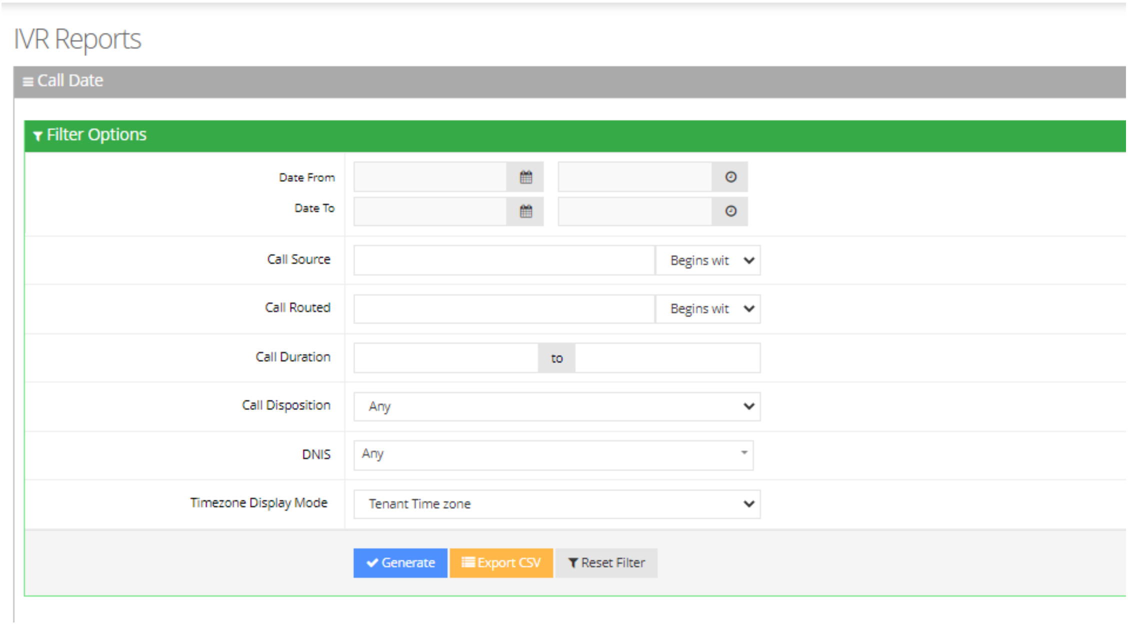


Call Date Report

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

➢ To generate a Call Date IVR report:

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



2. Select the appropriate filter fields:

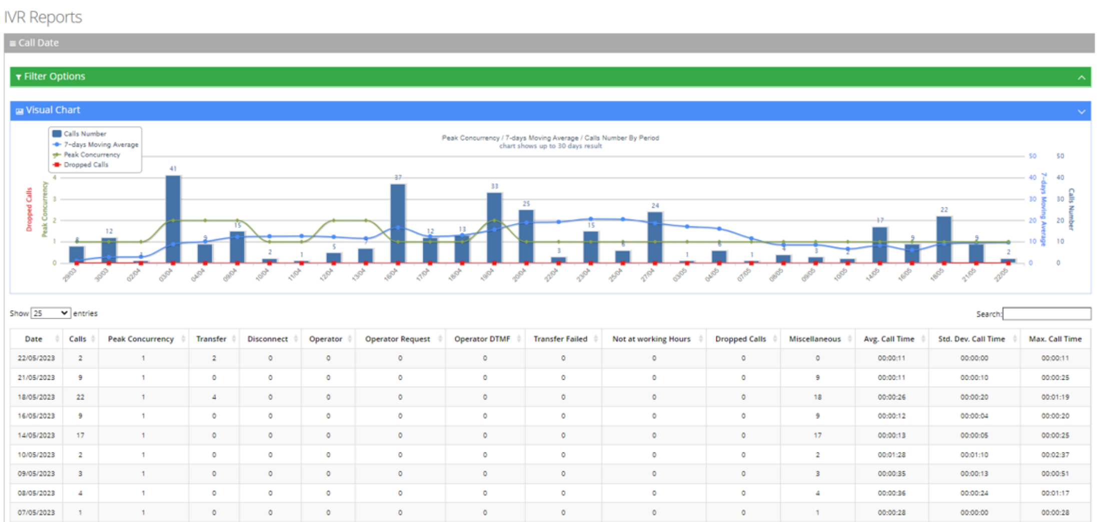
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Call Source:** Defines information that is related to a specific source number.
- **Call Routed:** Defines information that is related to a call that was routed 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.

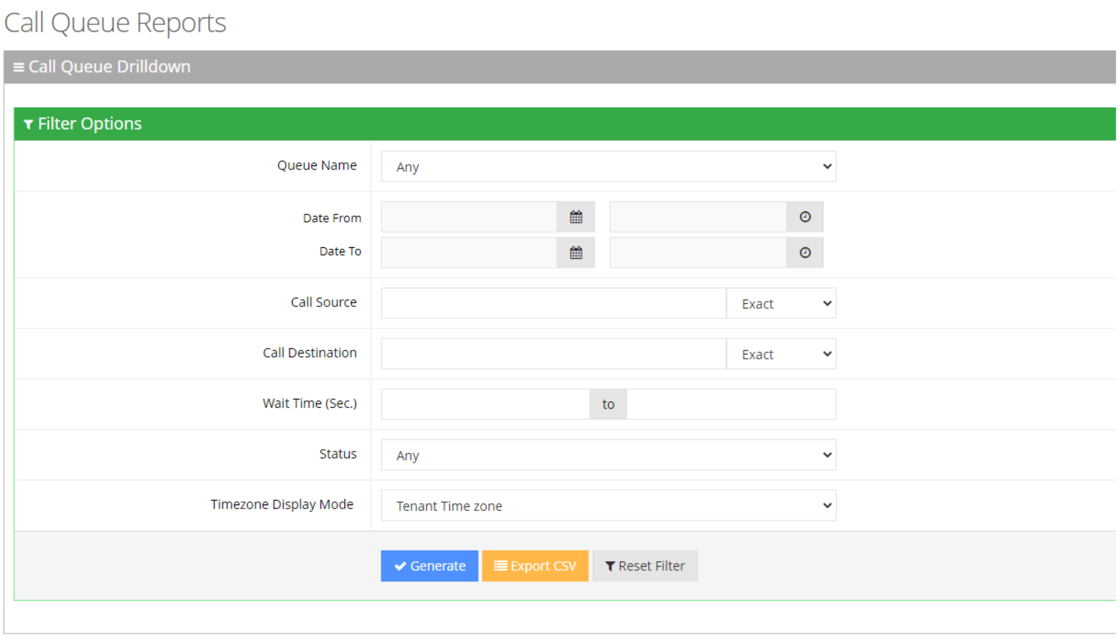


Drilldown Report

The procedure below describes how to generate an Overall report.

➢ To generate a Drilldown report:

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

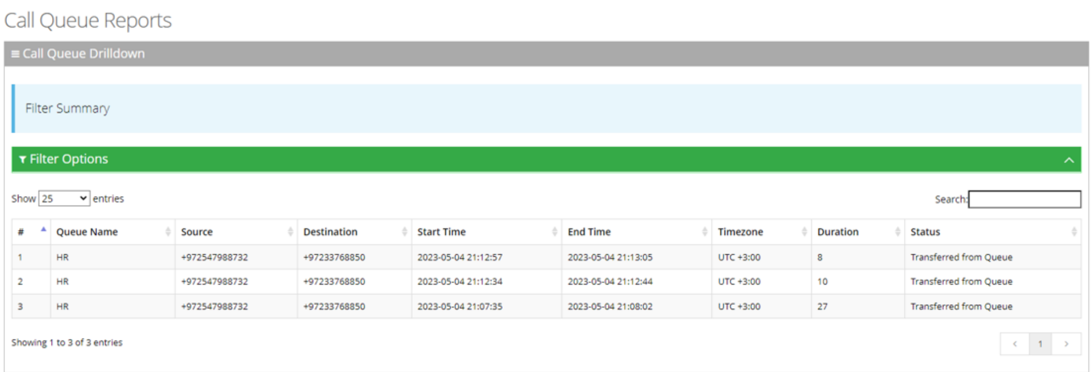


2. Select the appropriate filter fields:

   - **Queue Name:** Select a specific queue name or 'Any' to show statistics for all call queues.
   - **Date From:** Defines the From Date from which the calls were made.
   - **Date To:** Defines the To Date that calls were made till.
   - **Call Source:** Defines the source that calls were made from.
   - **Call Destination:** Defines the destination that calls were routed to from the queue.
   - **Wait Time:** Defines the call waiting time in the queue.
   - **Status:** Defines the disposition of the call when leaving the queue. 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.



Real-Time Dashboard

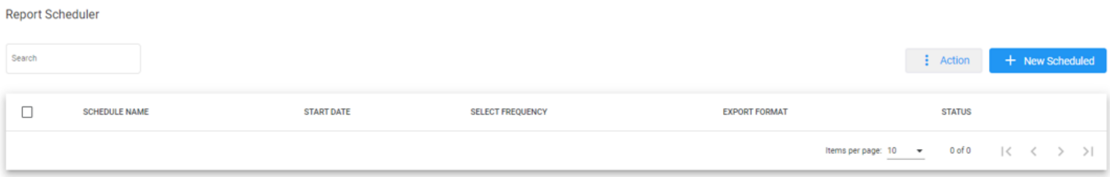
The Real-Time Dashboard provides an easy way to monitor the queue activity and to get real-time insights on queues.

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:



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:

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.

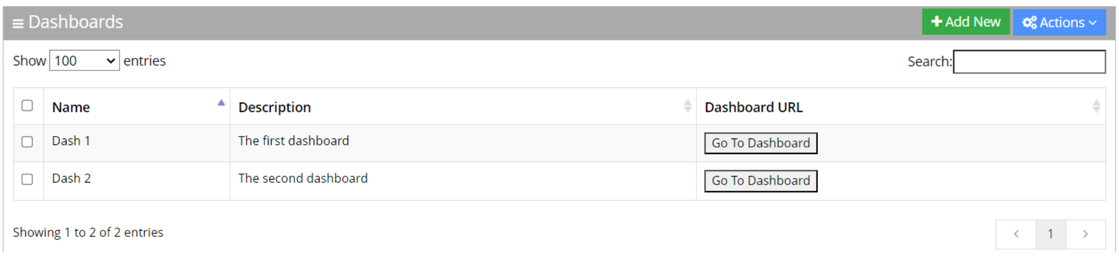
- The graphic view is generated automatically when up to two queues are configured. If more than two queues are configured, the dashboard displays a table view. The dashboard's data is reset every 24 hours at 00:00.

Editing a Dashboard

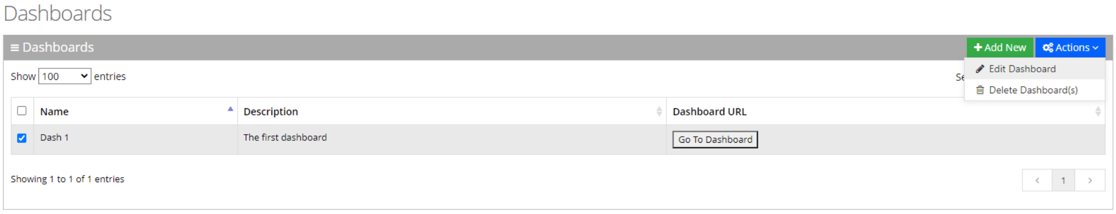
The procedure below describes how to edit a dashboard.

➢ To edit a dashboard:

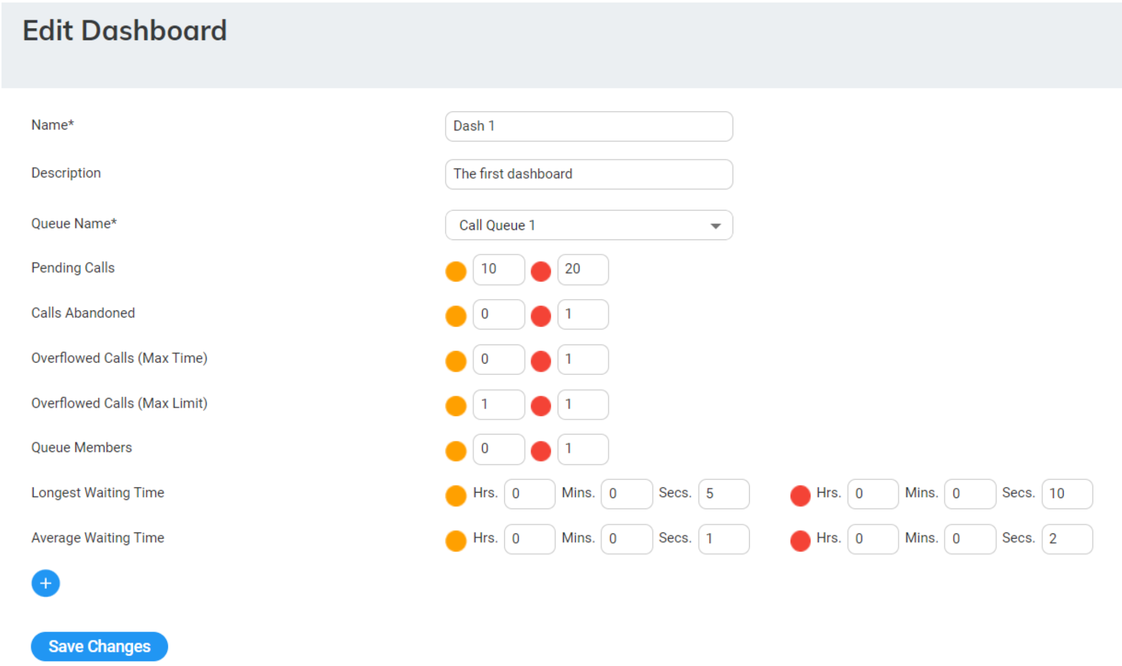
1. Open the Dashboards screen (**Reports** > **Interaction Center Reports** > **Real-time Dashboard**); the following appears:



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



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



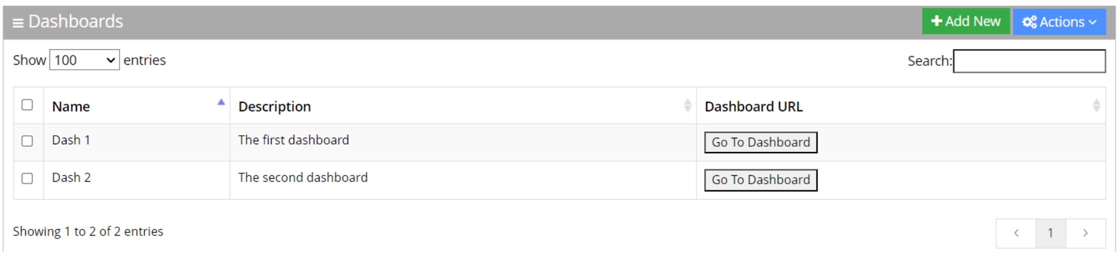
4. Make your changes on the 'Edit Dashboard' page, and then click **Save Changes**; the updated Dashboard details appear.

Deleting a Dashboard

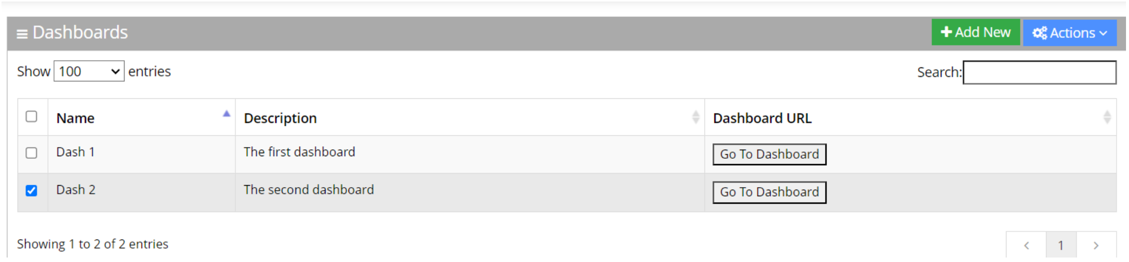
The procedure below describes how to delete a dashboard.

➢ To delete a dashboard:

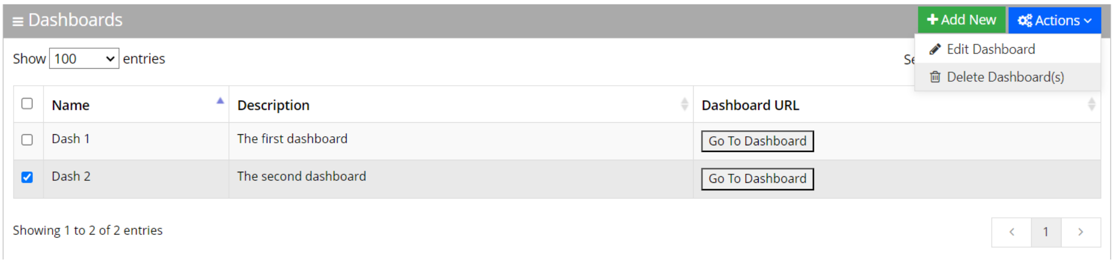
1. Open the Dashboards page (**Reports** > **Interaction Center Reports** > **Real-time Dashboard**); the following appears:



2. 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.

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.

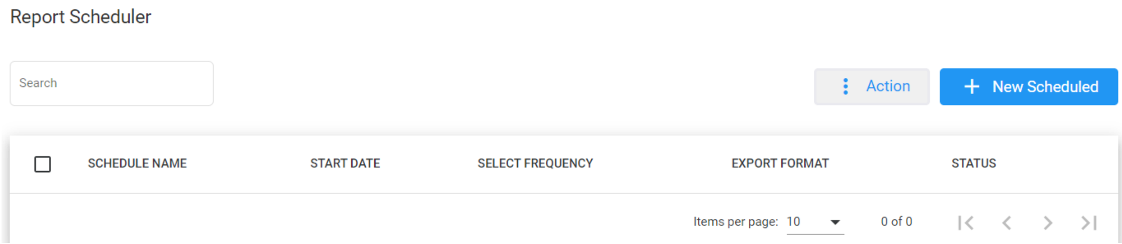
> The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click here.

Adding a Report Scheduler

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

➢ To add a new Report Scheduler:

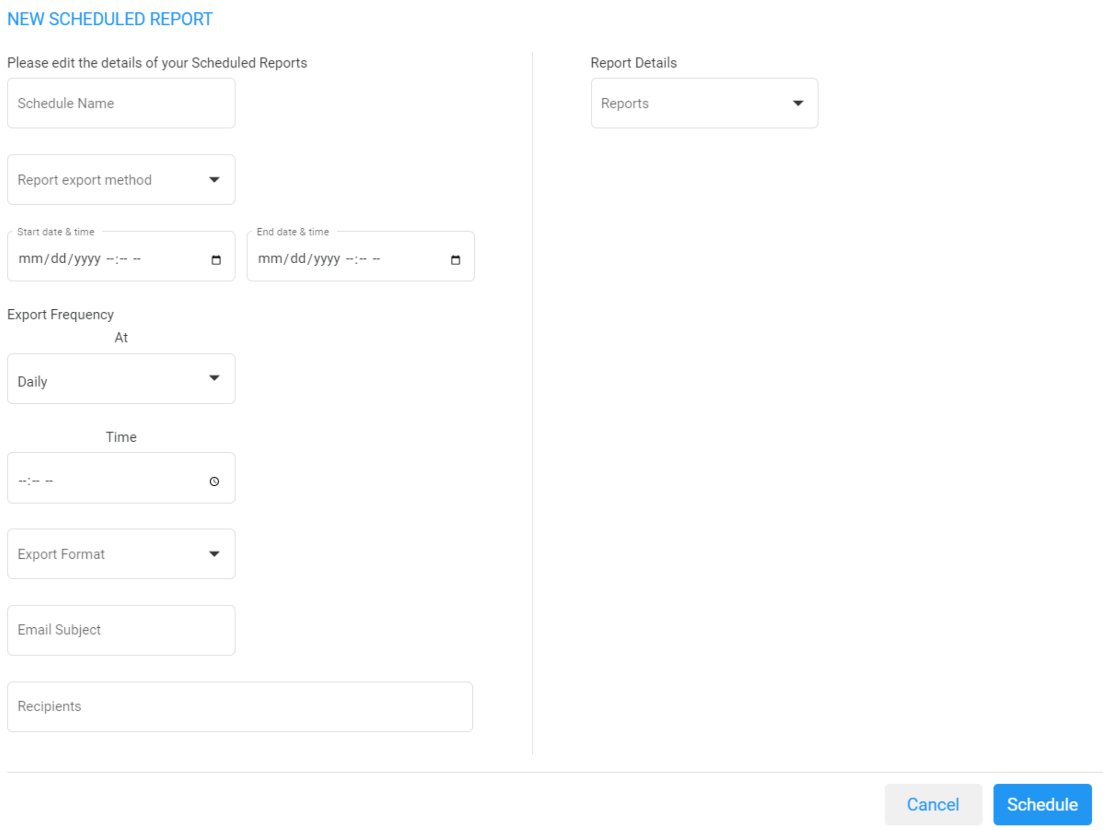
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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:



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.

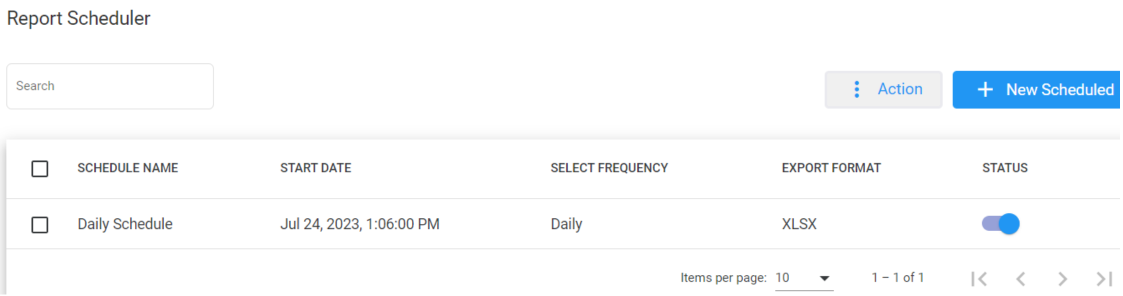
6. Click **Save Changes**.

Editing a Report Scheduler

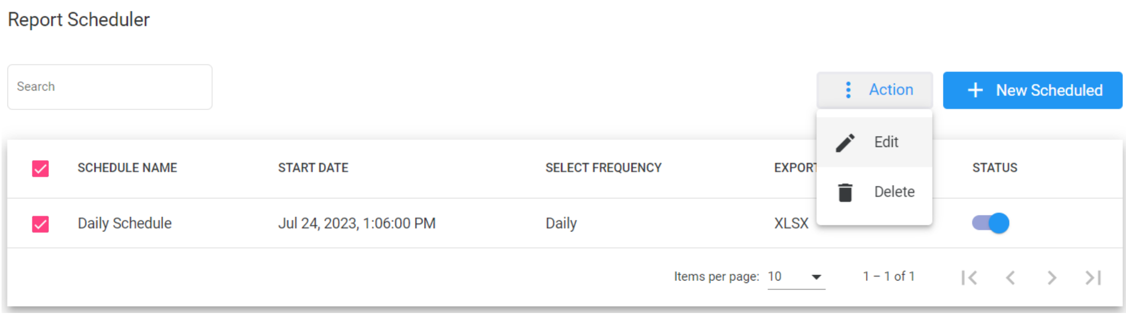
The procedure below describes how to edit a Report Scheduler.

➢ To edit a Report Scheduler:

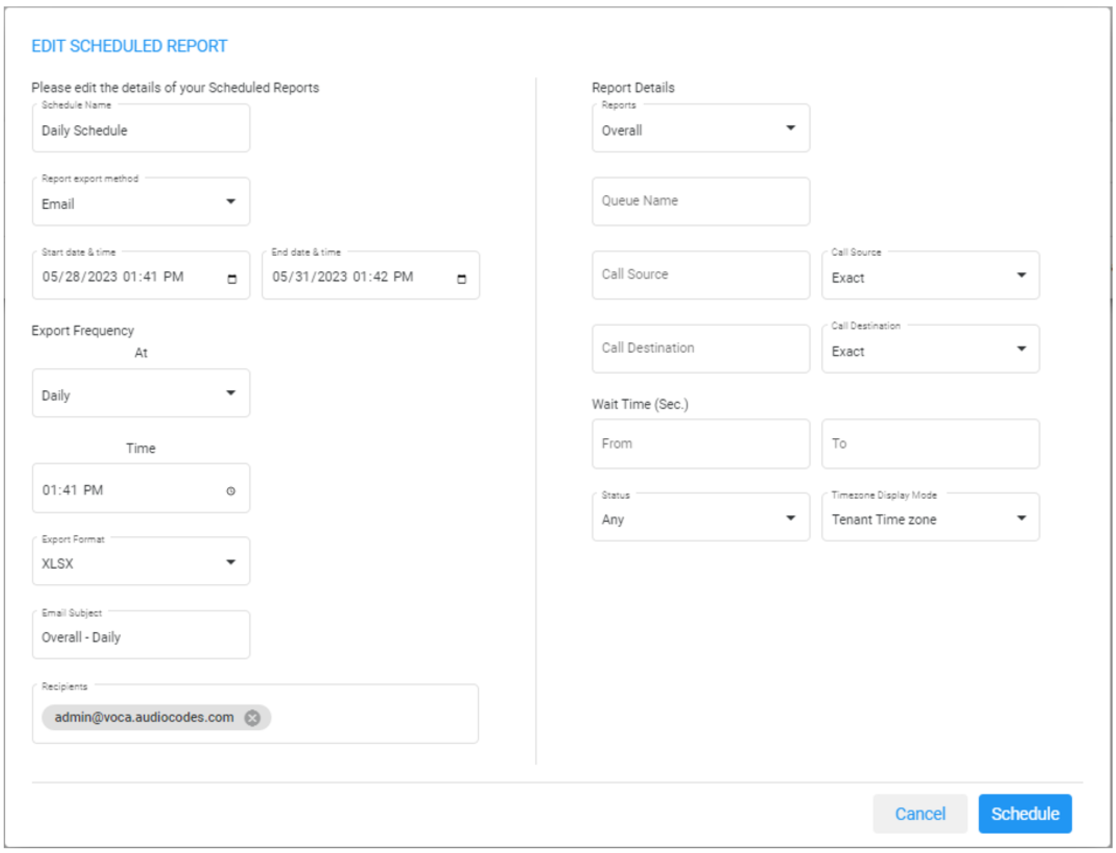
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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



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



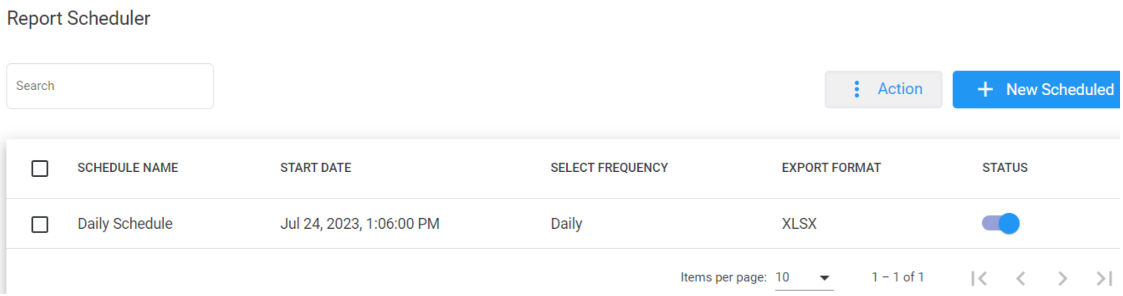
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

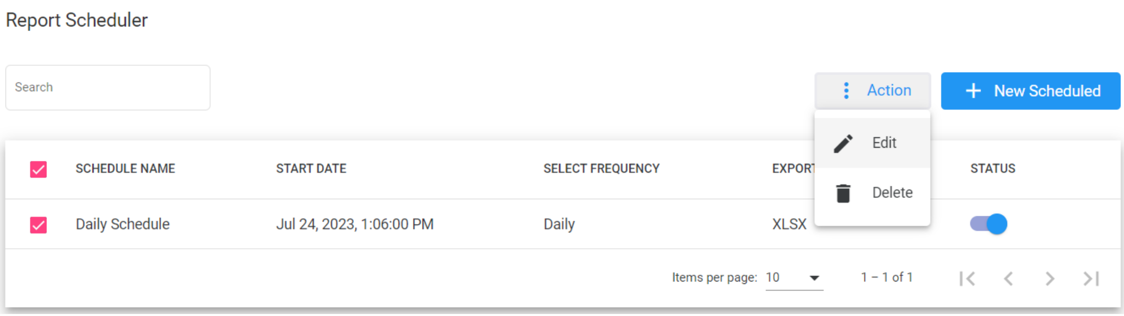
The procedure below describes how to delete a Report Scheduler.

➢ **To delete a Report Scheduler:**

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



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



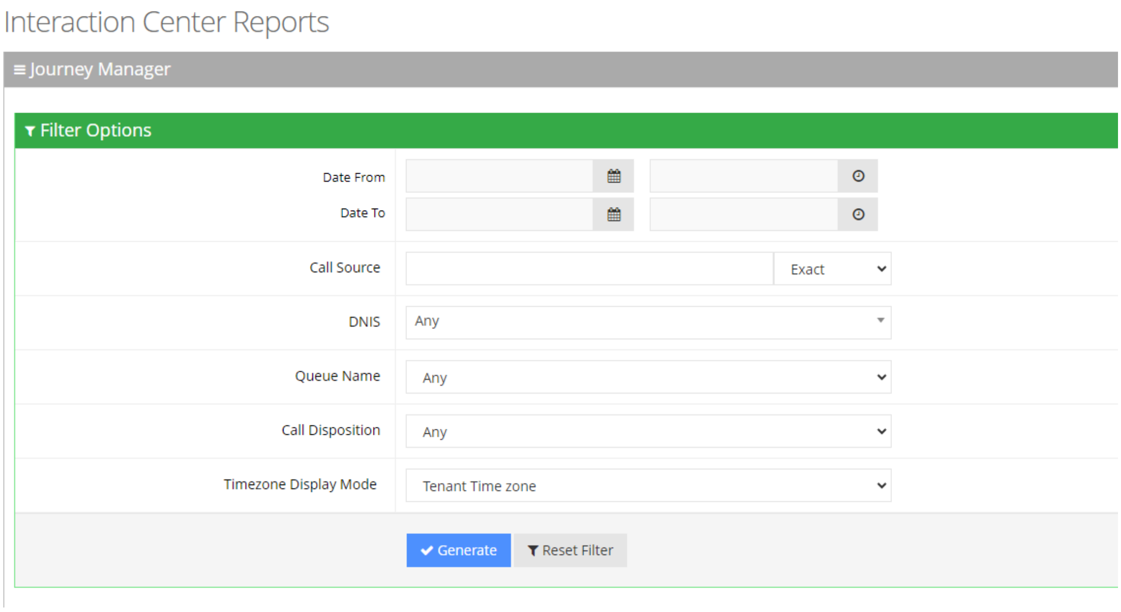
3. From the 'Actions' drop-down menu, choose **Delete**.

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:



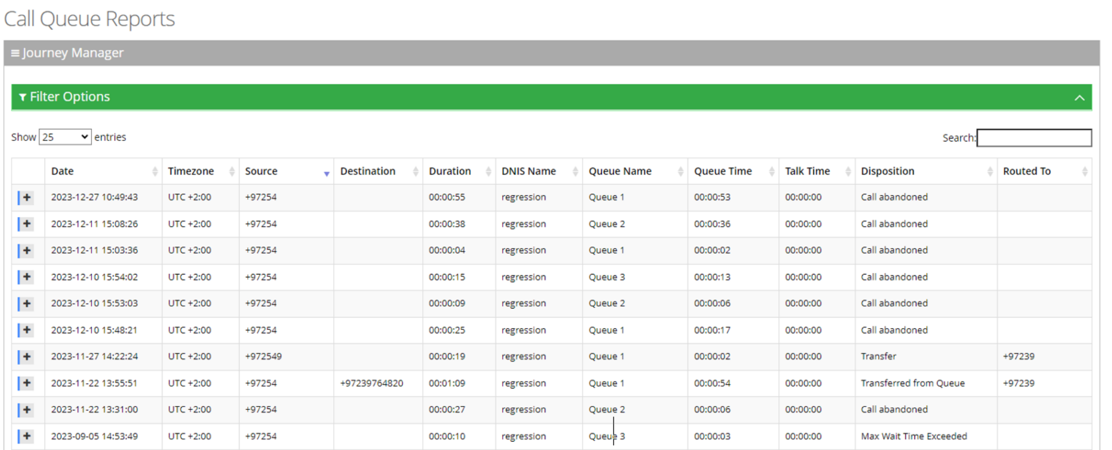
2. Select the appropriate filter fields to generate your report:

   - **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

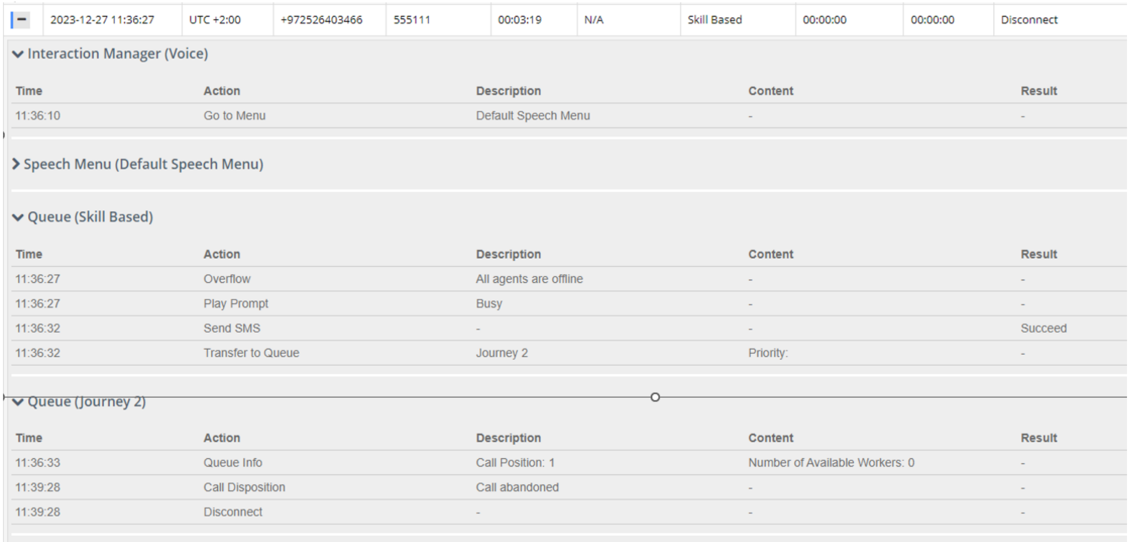
Filter Options

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	

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



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)

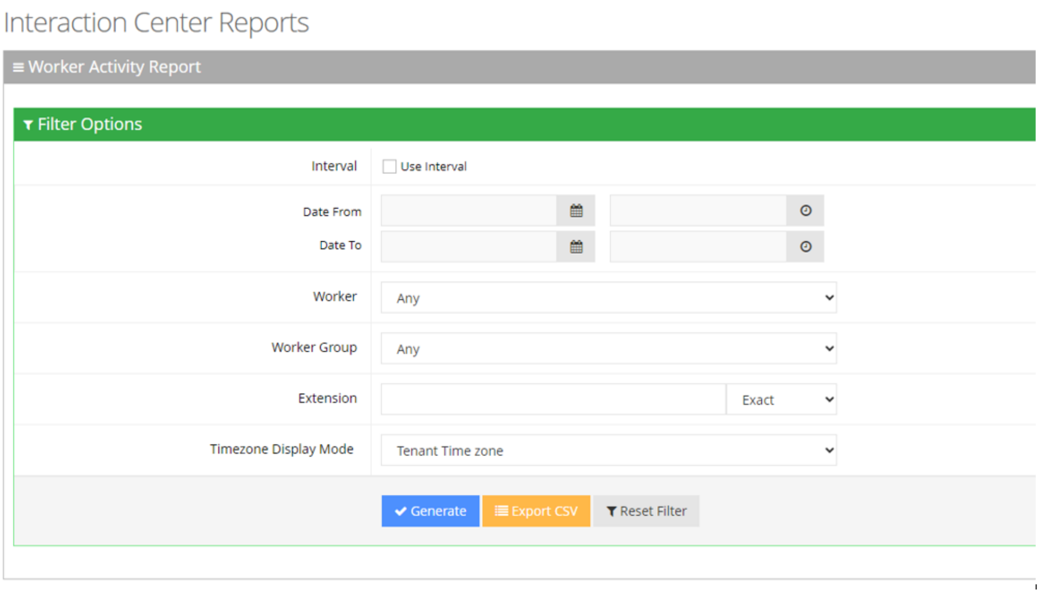
Time	Action	Description	Content	Result
11:36:33	Queue Info	Call Position: 1	Number of Available Workers: 0	-
11:39:28	Call Disposition	Call abandoned	-	-
11:39:28	Disconnect	-	-	-

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:



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.

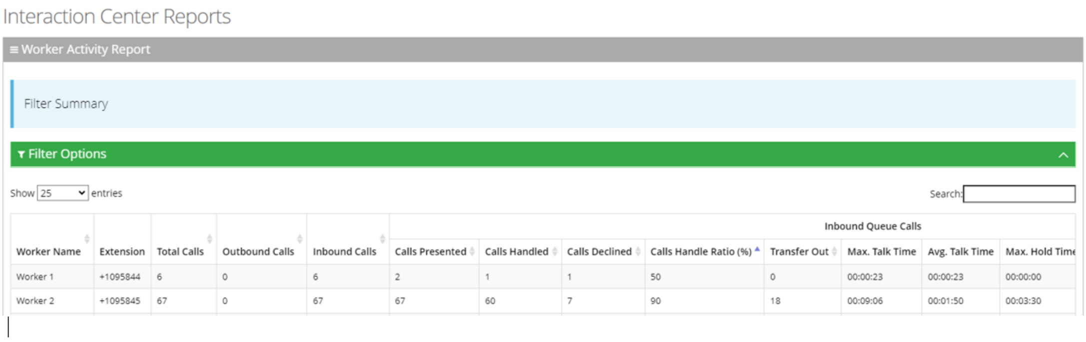
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Workers:** Defines information that is related to a specific worker.
- **Worker Group:** Defines information that is related to a specific worker group.
- **Extension:** 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.



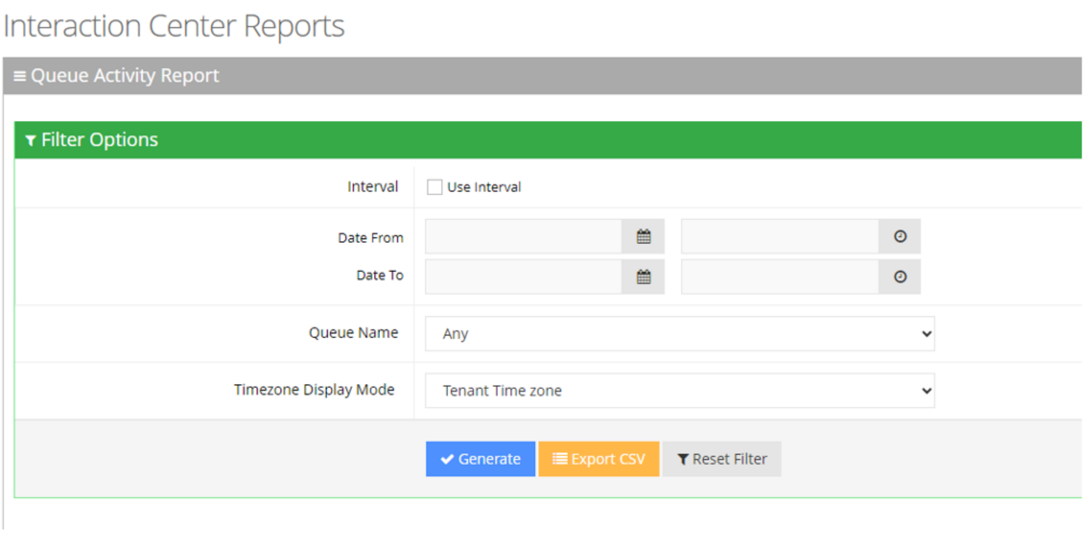
Queue Activity Report

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:



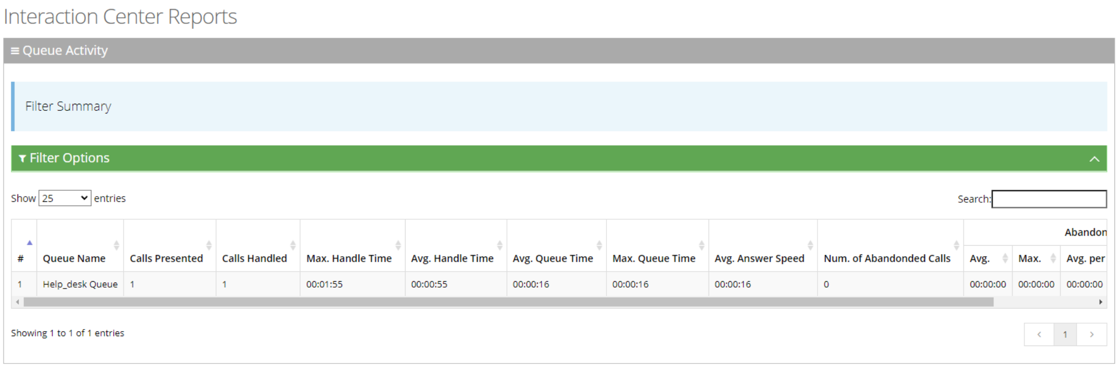
2. Select the appropriate filter fields to generate your report:
   - **Interval:** Defines how the report's date intervals are segmented. Select the check-box to reveal a drop-down list of predefined time periods, based on the customer's end date ("Date To"):
     - **Last Day:** Displays data from 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.

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



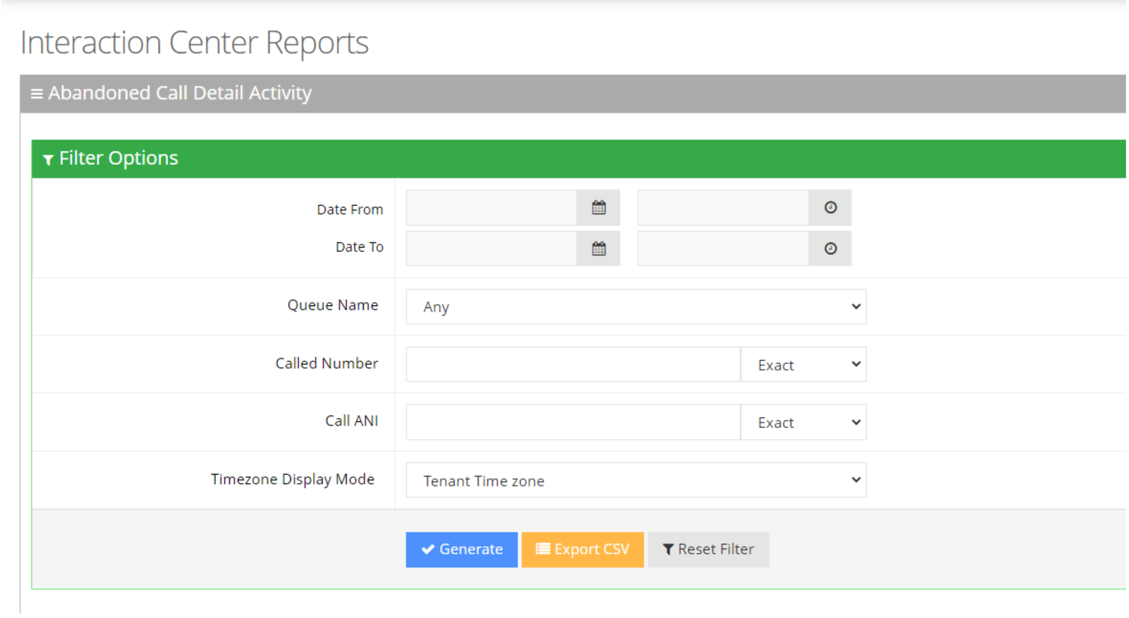
Abandoned Call Report

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:

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



2. Select the appropriate filter fields:

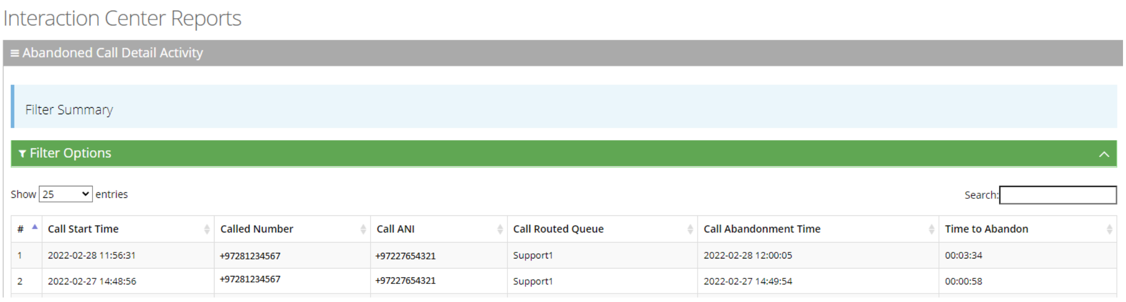
- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.

- **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.

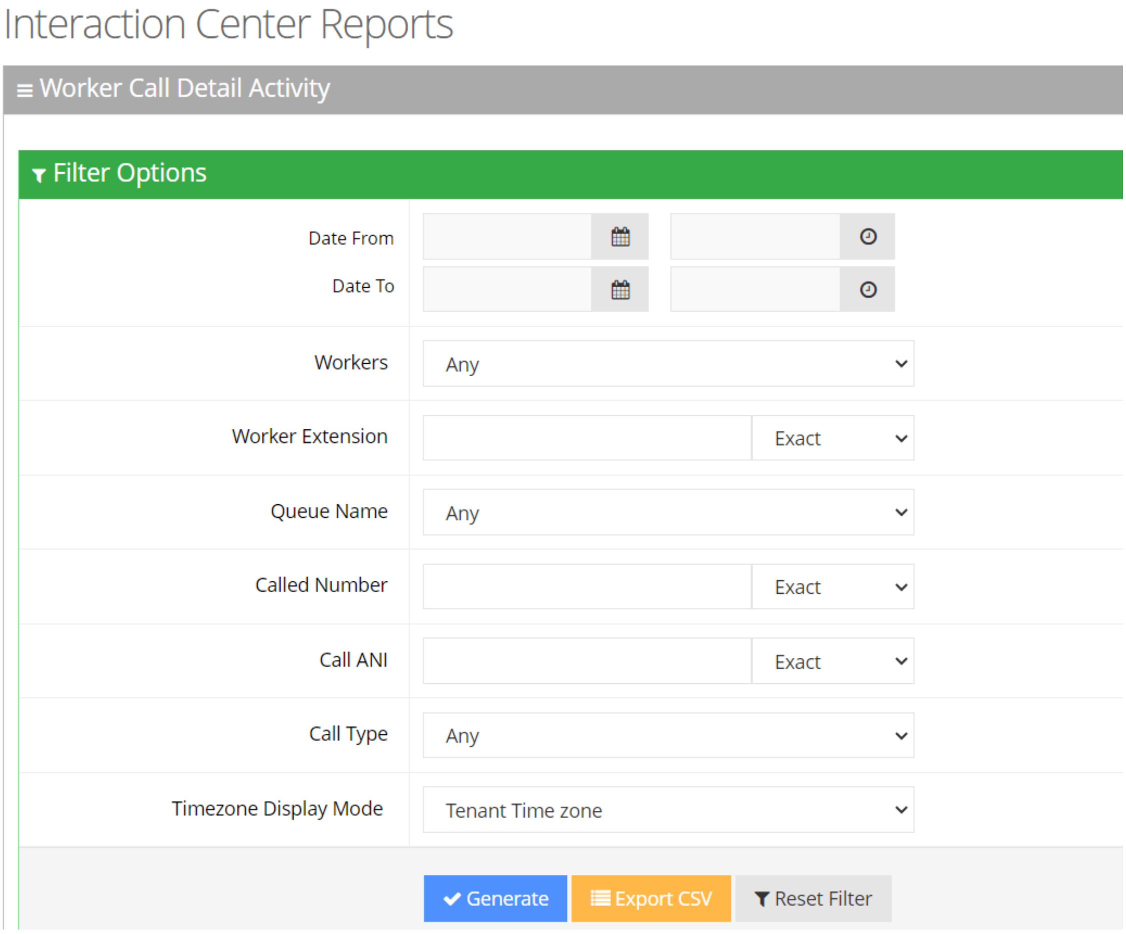


Worker Call Report

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:



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

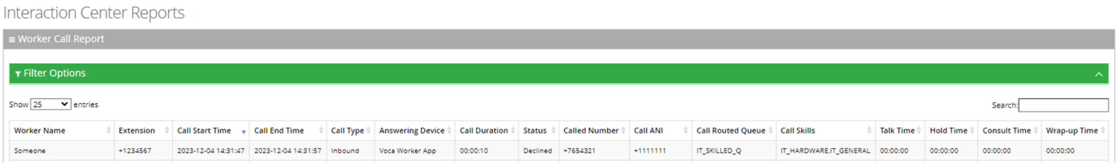
- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.
- **Workers:** Defines information that is related to a specific worker.
- **Workers Extension:** Defines information that is related to a specific extension.
- **Queue Name:** 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 Num-ber 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.

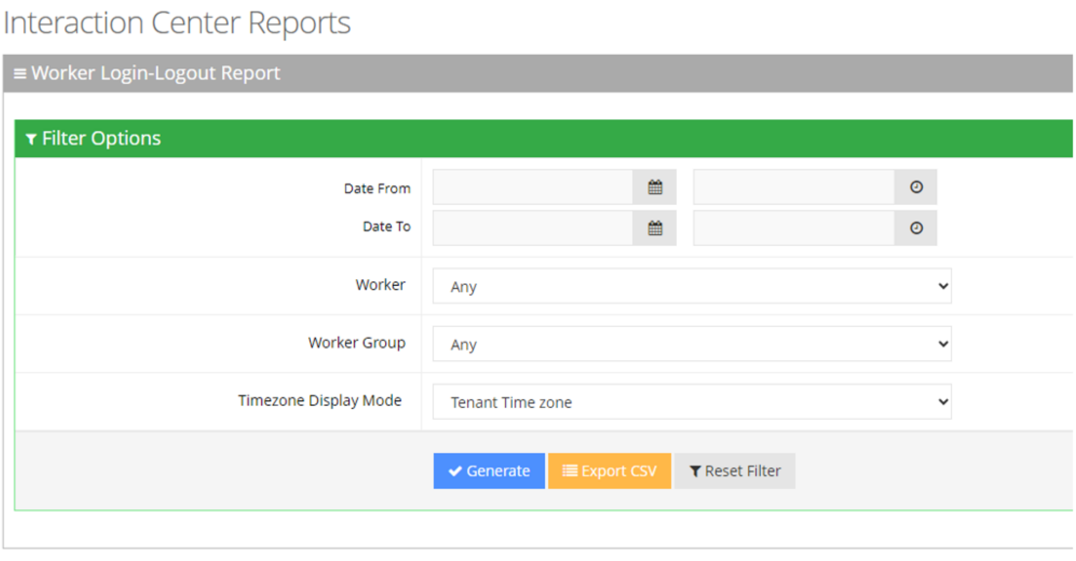


Worker Login-Logout Report

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:



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

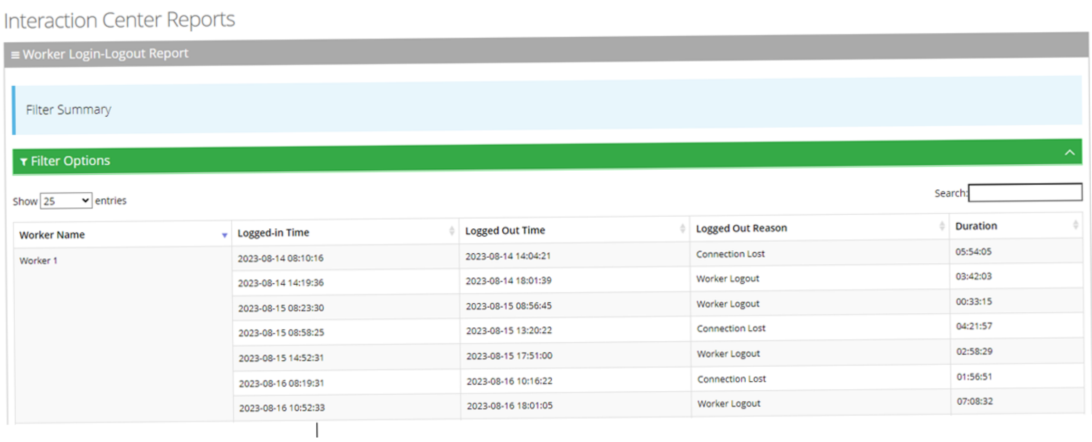
   - **Date From:** Defines this report for a specific time range.
   - **Date To:** Defines this report for a specific time range.
   - **Worker:** Defines information that is related to a specific worker.
   - **Worker Group:** Defines information that is related to a specific worker group.
   - **Timezone 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: 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.

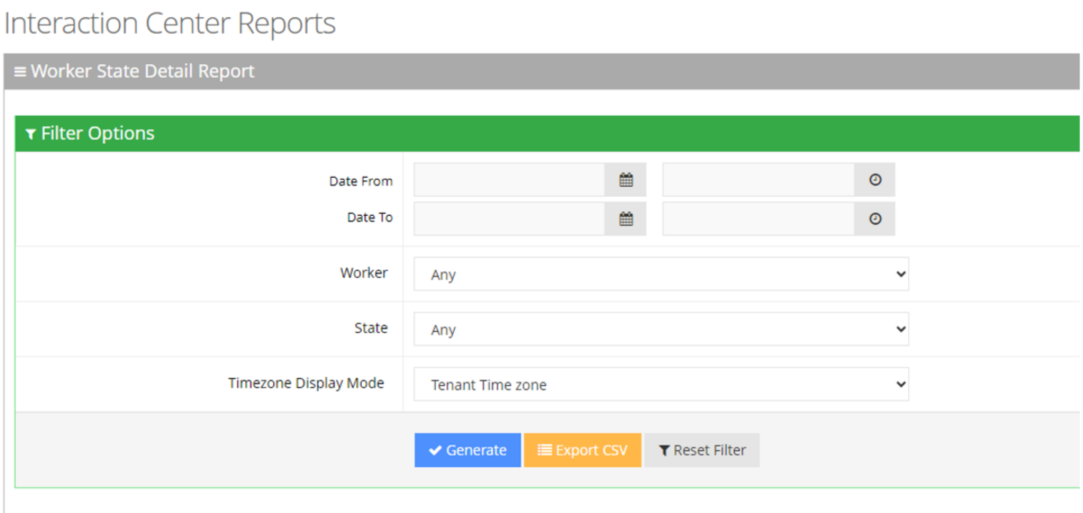


Worker State Detail Report

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:



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

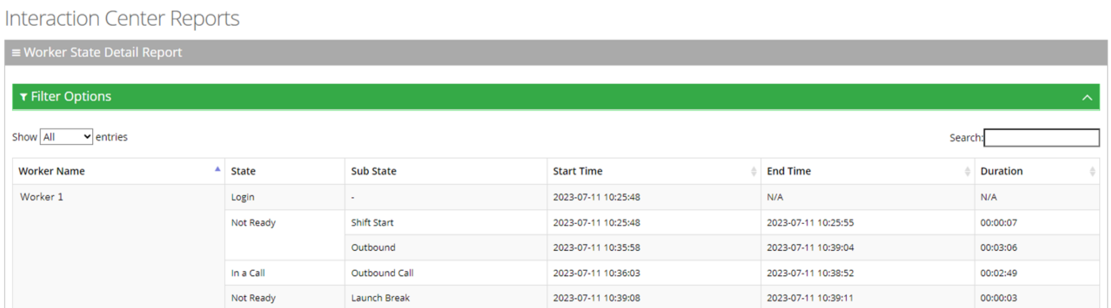
- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.
- **Workers:** Defines information that is related to a specific worker.
- **State:** Defines information that is related to a specific worker state or "Any'. The worker state 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.

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

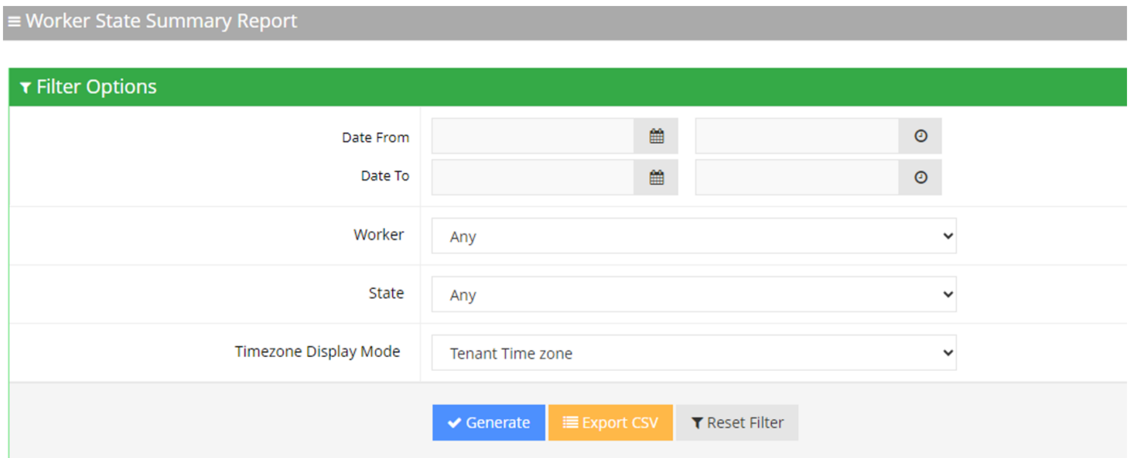


Worker State Summary Report

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:

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



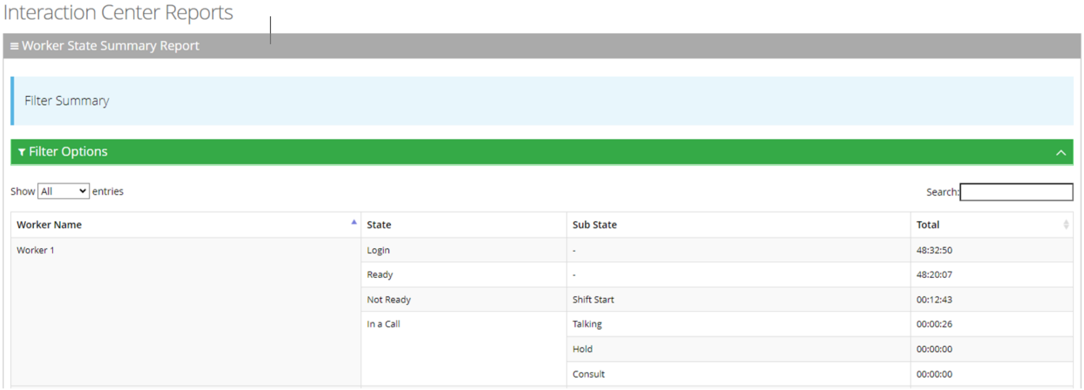
2. Select the appropriate filter fields to generate your report:
   - **Date From:** Defines this report for a specific time range.

- **Date To:** Defines this report for a specific time range.
- **Worker:** Defines information that is related to a specific worker.
- **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.



Real-Time Dashboard

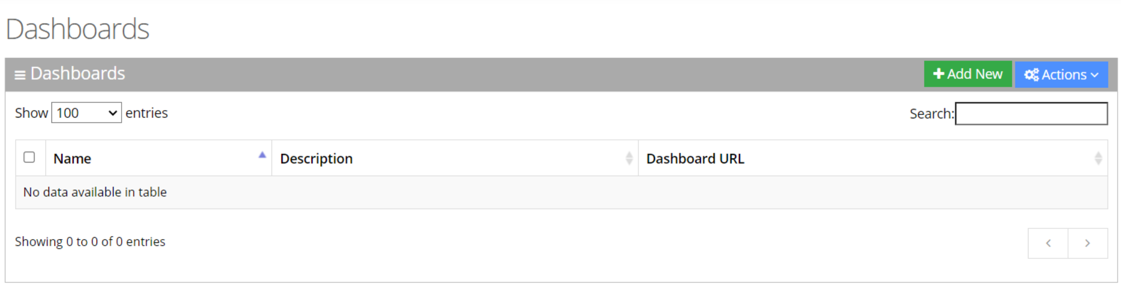
The Interaction Center Dashboard enables supervisors to monitor the workers and queue activity by creating customized dashboards to get
real-time insights on interaction center performance.

Adding a Real-Time Dashboard

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

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

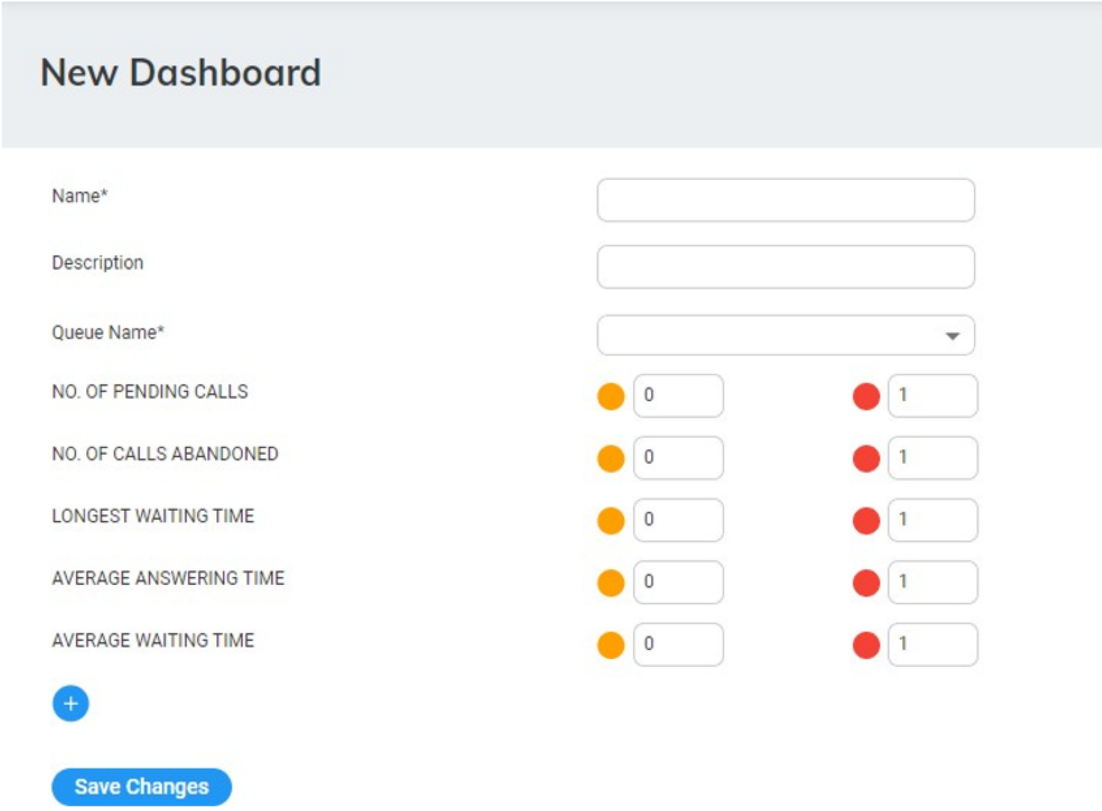
1. Open the Dashboards page (**Reports** > **Interaction Center Reports** > **Real-time Dashboard**); the following appears:



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:



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 Aban-doned	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.

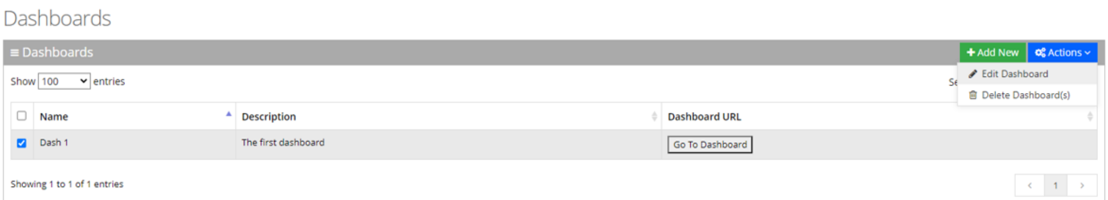
Editing a Real-Time Dashboard

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

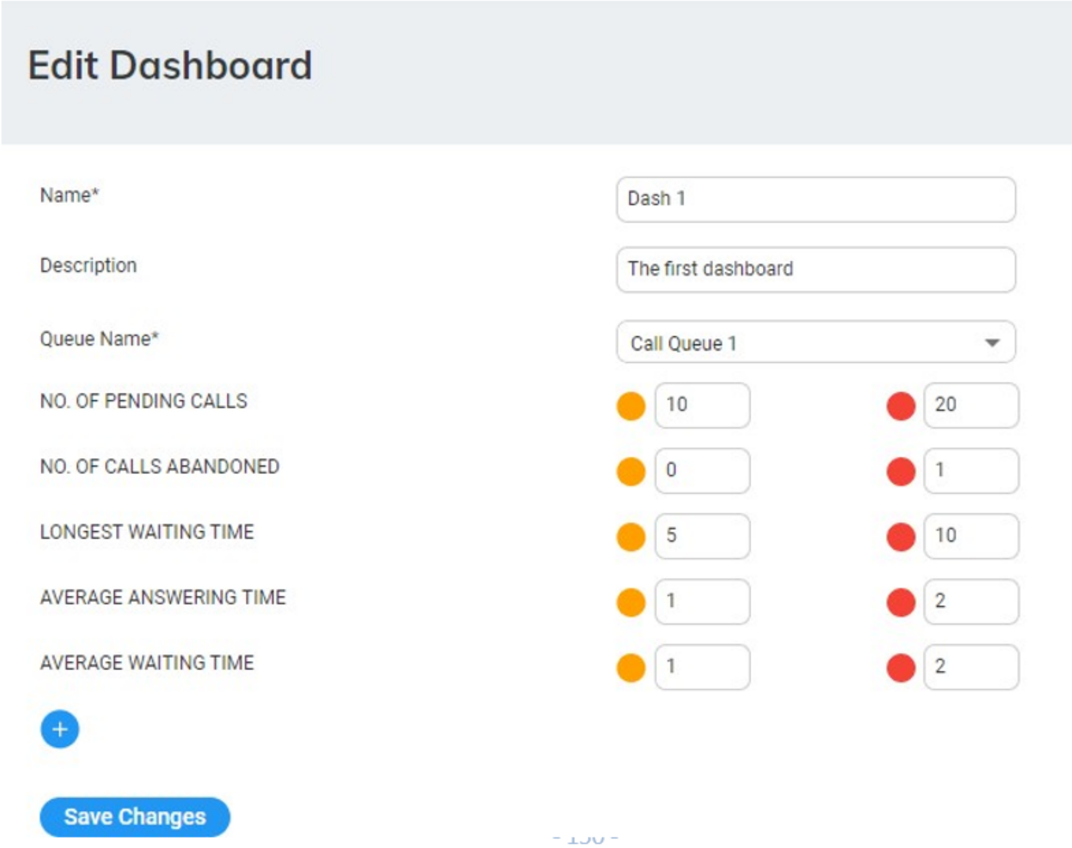
➢ To edit a real-time dashboard:

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

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



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



4. 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:**

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

2. 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.

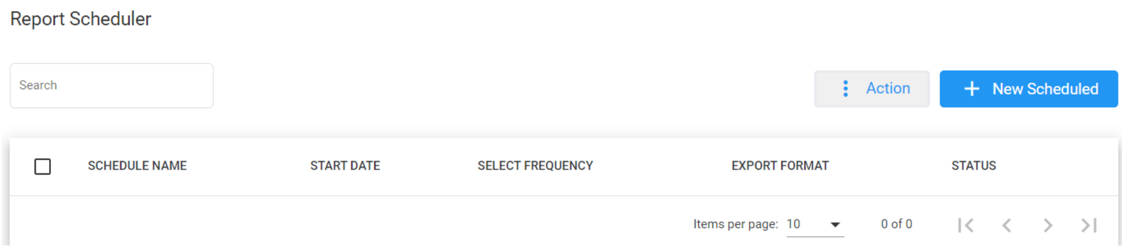
> The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click here.

Adding a Report Scheduler

The procedure below describes hot to add a Report Scheduler.

➢ **To add a new Report Scheduler:**

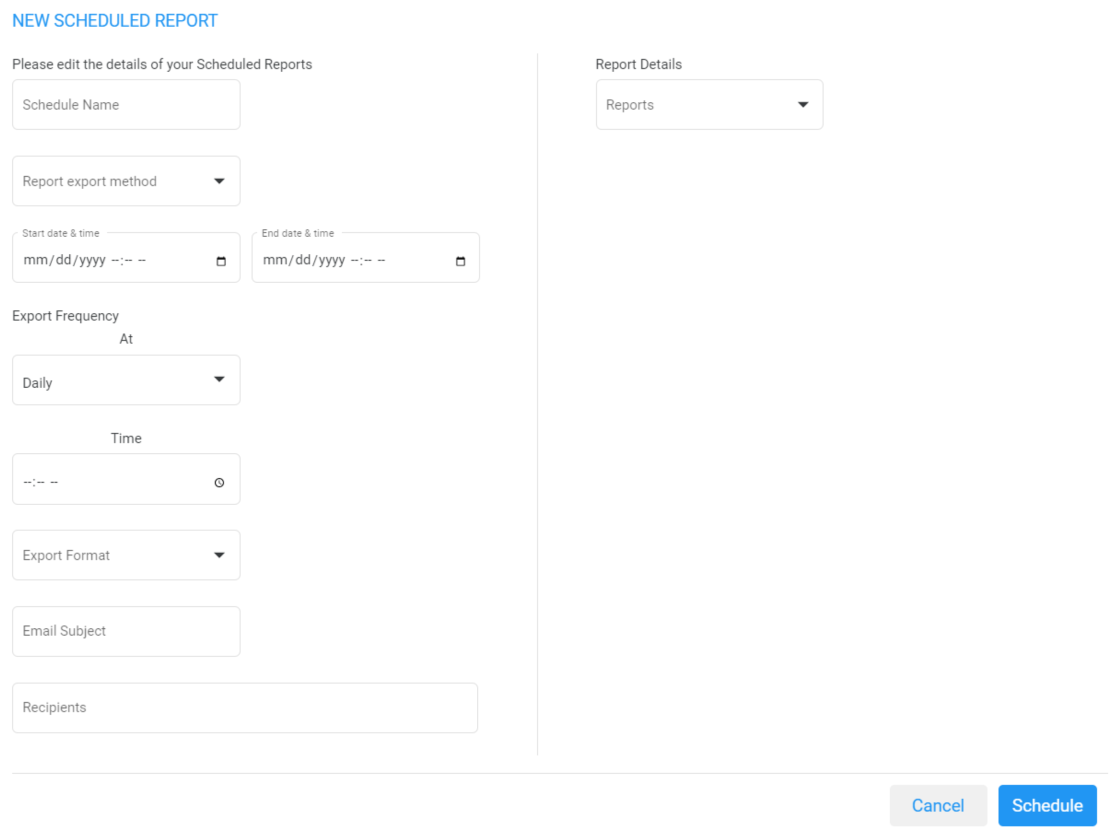
1. Open the Report Scheduler page (**Reports** > **IVR Reports** > **Report Scheduler**); the following appears:



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:



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.

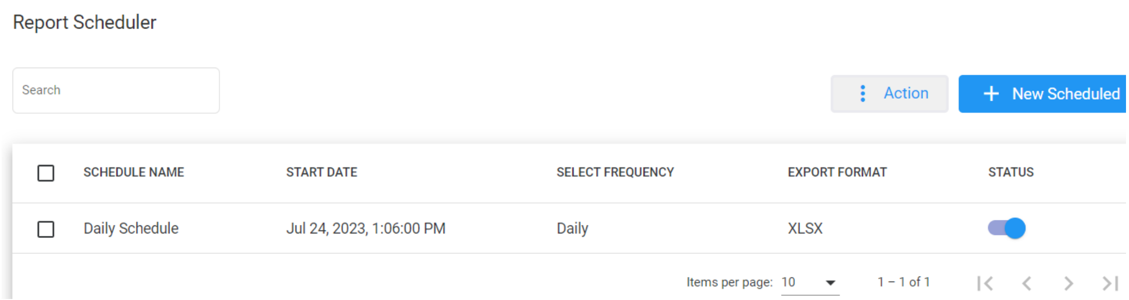
6. Click **Save Changes**.

Editing a Report Scheduler

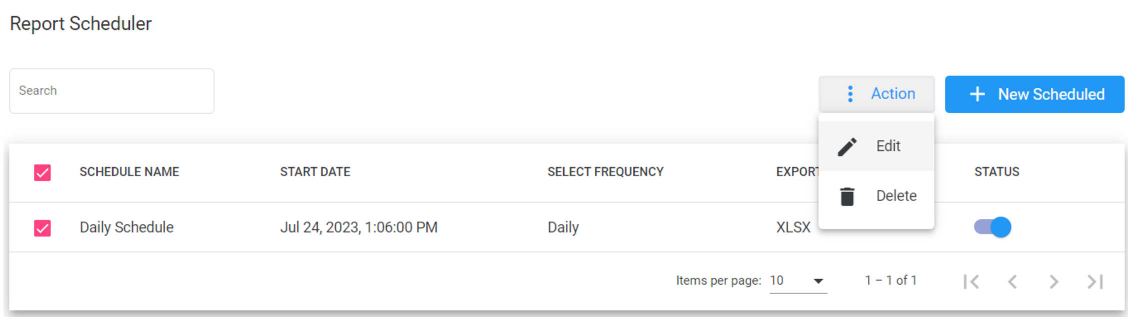
The procedure below describes how to edit a Report Scheduler.

➢ To edit a Report Scheduler:

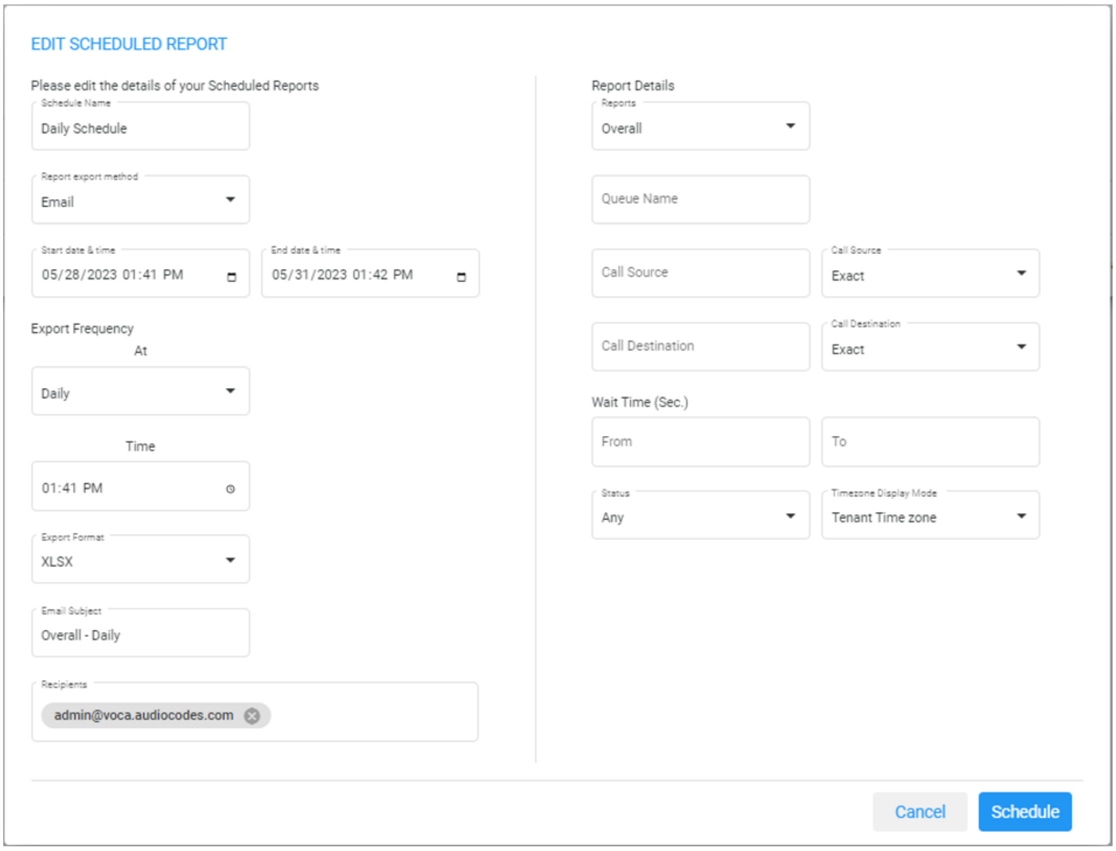
1. Open the Report Scheduler page (**Reports > IVR Reports > Report Scheduler**); the following appears:



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



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



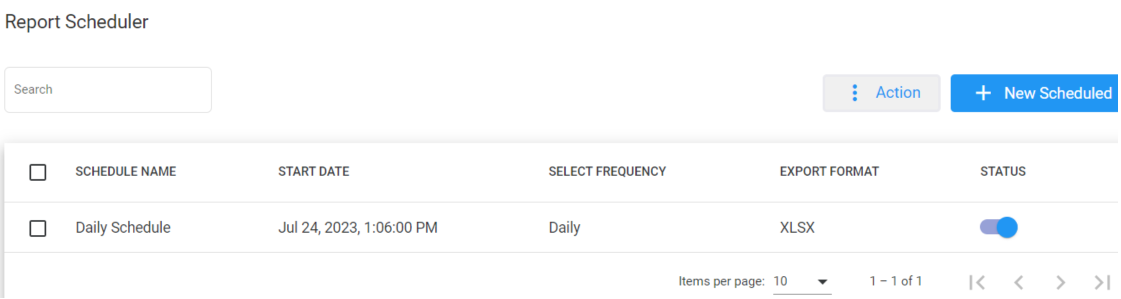
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

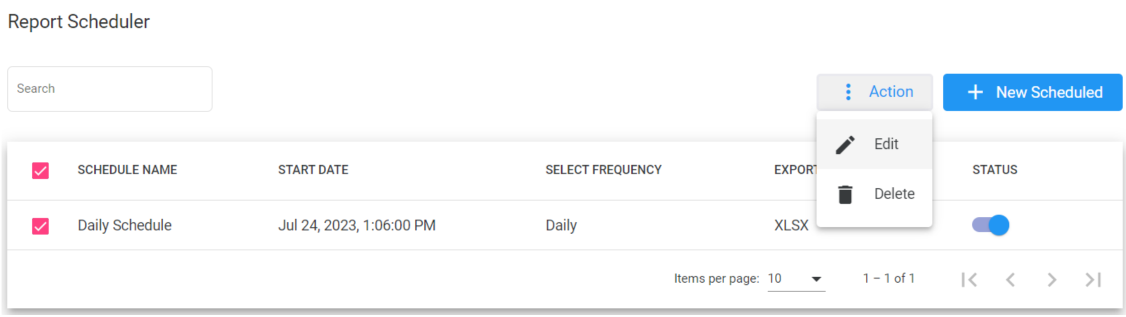
The procedure below describes how to delete a Report Scheduler.

➢ To delete a Report Scheduler:

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



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



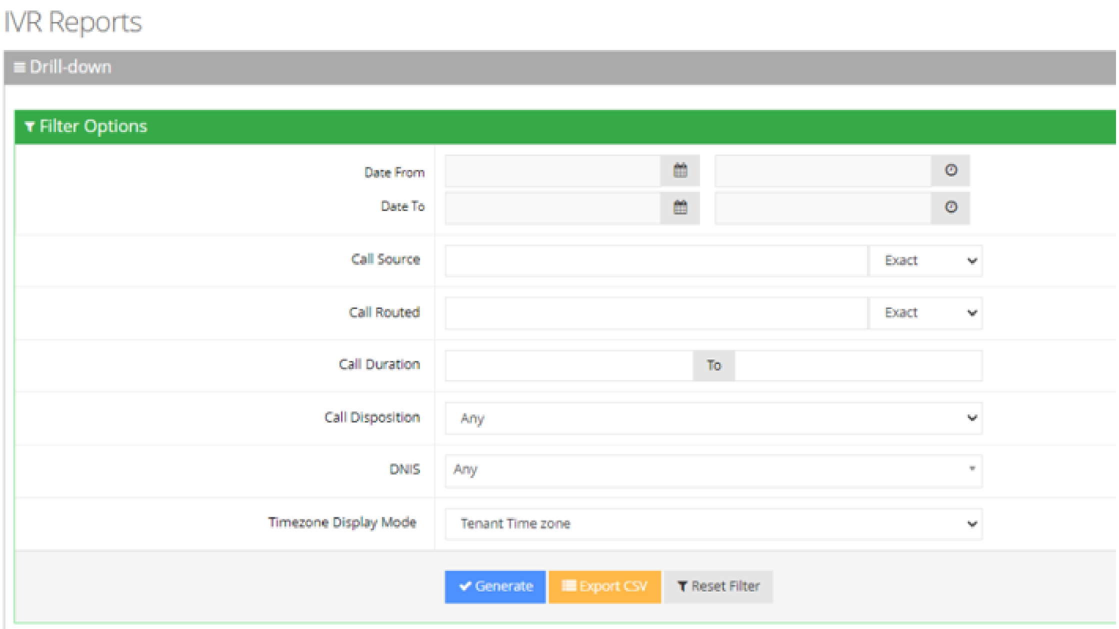
3. From the ‘Actions’ drop-down menu, choose **Delete**.

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:

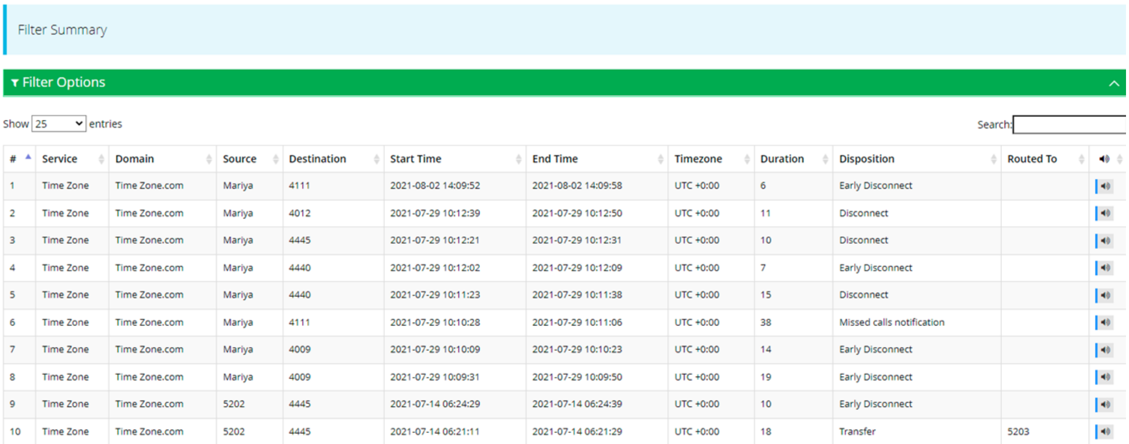
1. Open the Filter Options screen (**Reports** > **IVR Reports** > **Drill-down**; the following appears:



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 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:

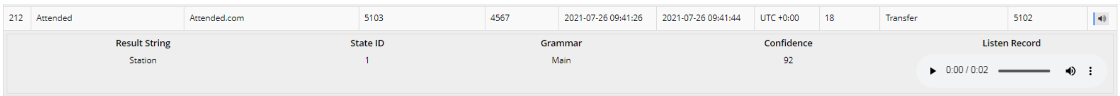
#	Service	Domain	Source	Destination	Start Time	End Time	Timezone	Duration	Disposition	Routed To	
1	Time Zone	Time Zone.com	Mariya	4111	2021-08-02 14:09:52	2021-08-02 14:09:58	UTC +0:00	6	Early Disconnect		
2	Time Zone	Time Zone.com	Mariya	4012	2021-07-29 10:12:39	2021-07-29 10:12:50	UTC +0:00	11	Disconnect		
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.

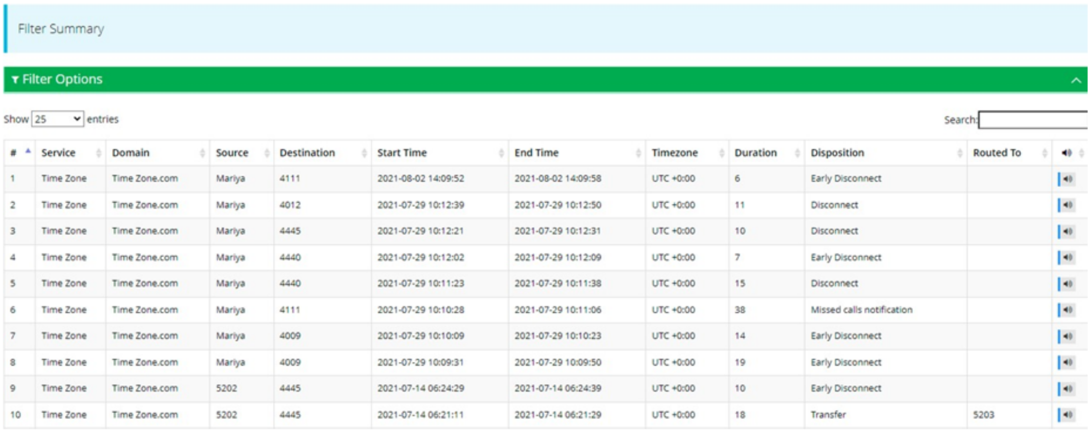
Call Details information is displayed for each call. If recognitions where made on a particular call, the recognition results (one or more) are shown. When you display the information, the following appears:



Each recognition includes the following:

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

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


Filter Summary

Filter Options

Show 25 entries Search:

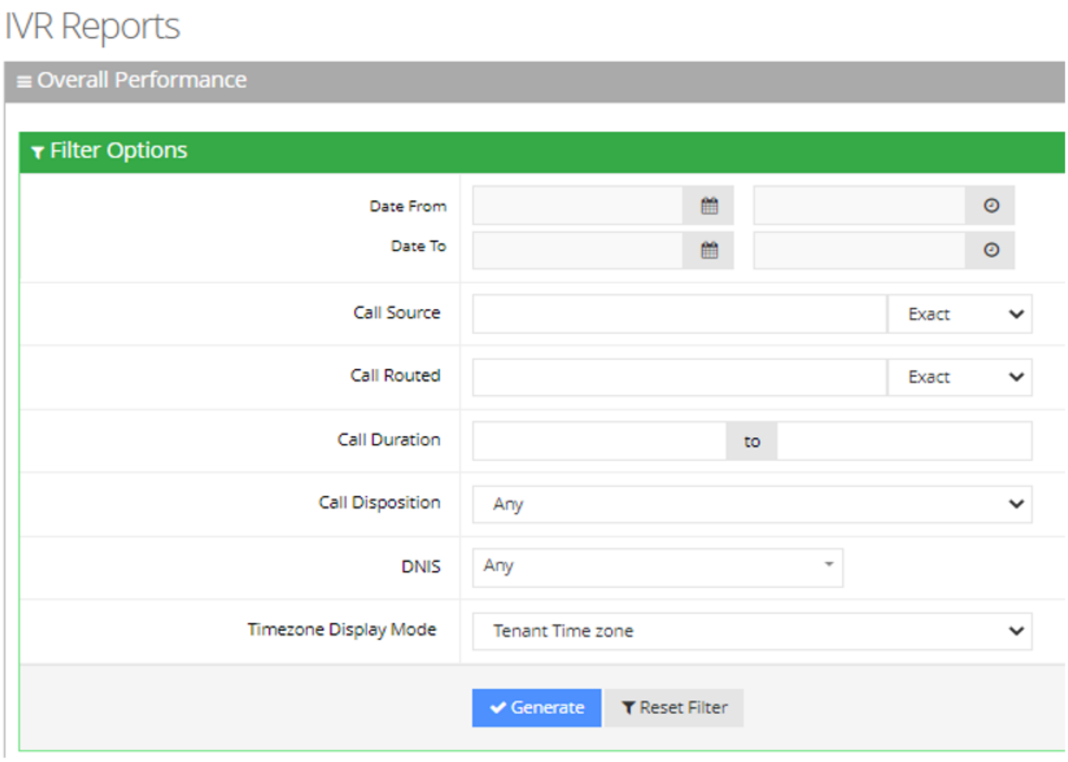
#	Service	Domain	Source	Destination	Start Time	End Time	Timezone	Duration	Disposition	Routed To	
1	Time Zone	Time Zone.com	Mariya	4111	2021-08-02 14:09:52	2021-08-02 14:09:58	UTC +0:00	6	Early Disconnect		
2	Time Zone	Time Zone.com	Mariya	4012	2021-07-29 10:12:39	2021-07-29 10:12:50	UTC +0:00	11	Disconnect		
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	

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.



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.

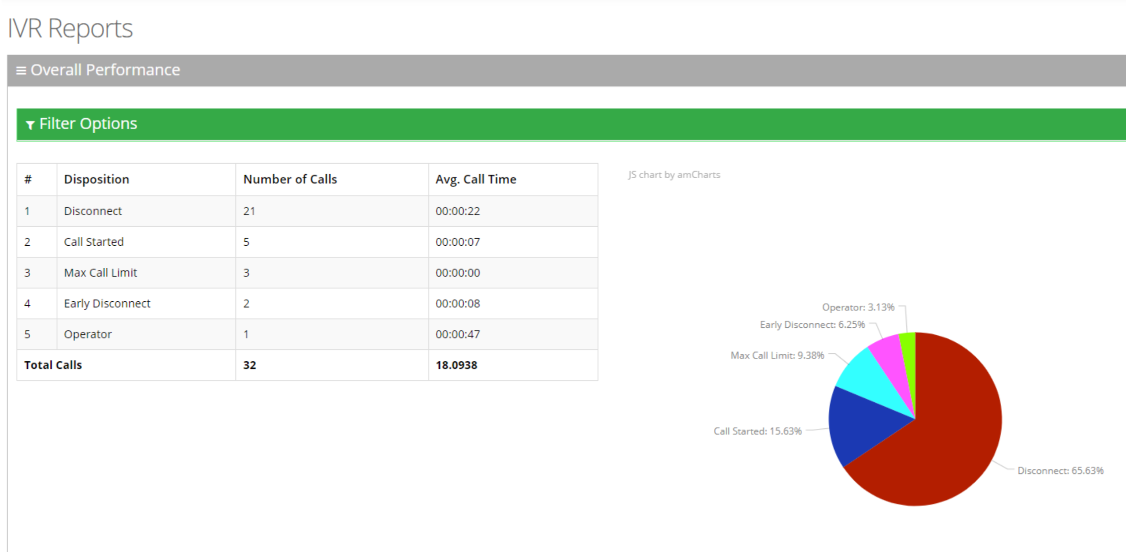
The time zone of calls can be one of the following options:

  - **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.



#	Disposition	Number of Calls	Avg. Call Time
1	Disconnect	21	00:00:22
2	Call Started	5	00:00:07
3	Max Call Limit	3	00:00:00
4	Early Disconnect	2	00:00:08
5	Operator	1	00:00:47
Total Calls		**32**	**18.0938**

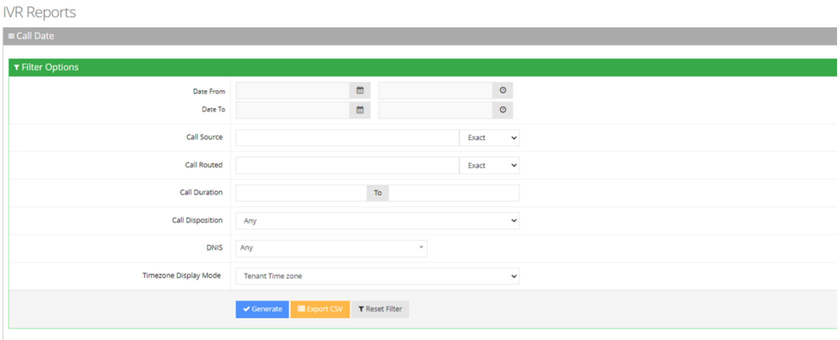
Call Hour Report

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:

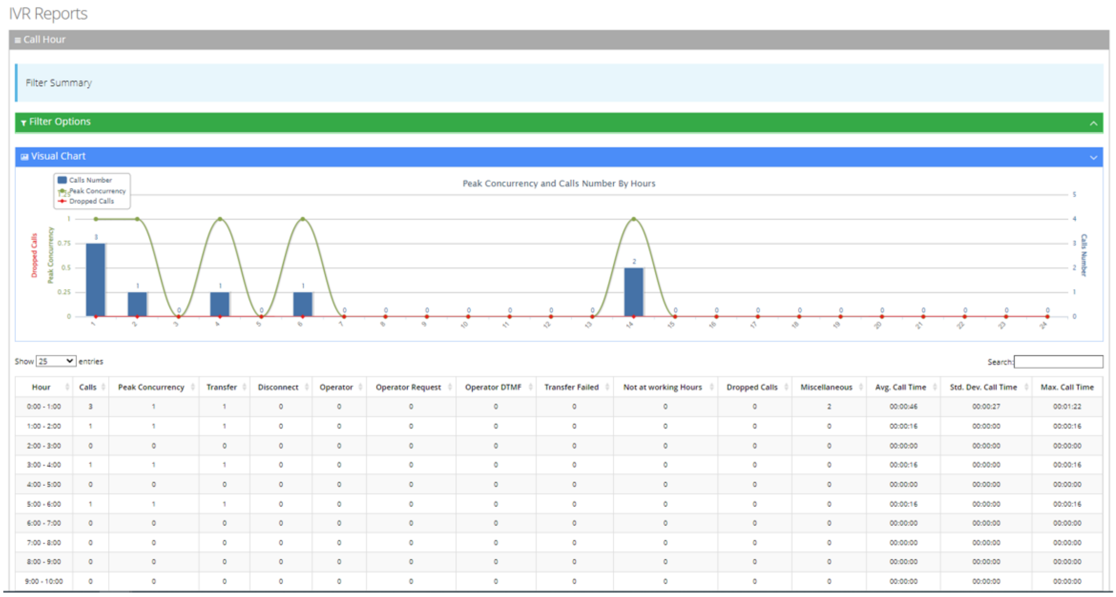
   - **Date From:** Defines this report for a specific date/time range.
   - **Date To:** Defines this report for a specific date/time range.
   - **Call Source:** Defines information that is related to a specific source number.
   - **Call Routed:** Defines information that is related to calls routed to 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.



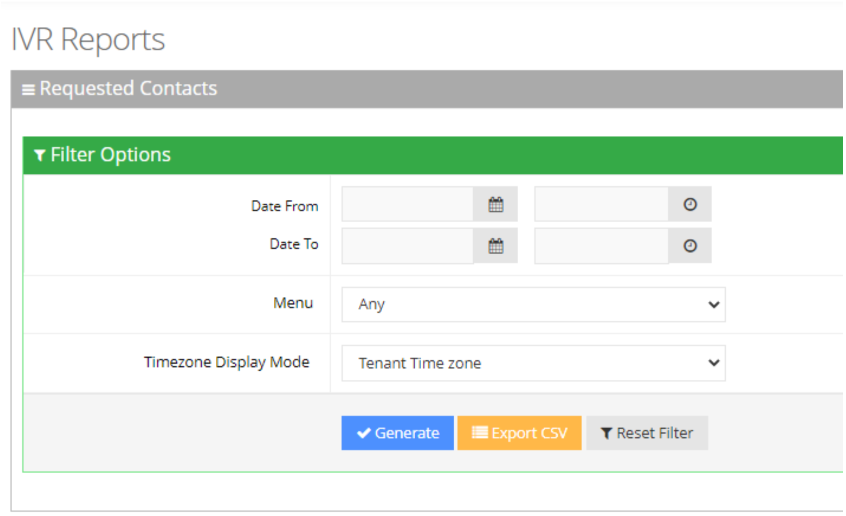
Hour	Calls	Peak Concurrency	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Dropped Calls	Miscellaneous	Avg. Call Time	Std. Dev. Call Time	Max. Call Time
0:00 - 1:00	3	1	1	0	0	0	0	0	0	0	2	00:00:46	00:00:27	00:01:22
1:00 - 2:00	1	1	1	0	0	0	0	0	0	0	0	00:00:16	00:00:00	00:00:16
2:00 - 3:00	0	0	0	0	0	0	0	0	0	0	0	00:00:00	00:00:00	00:00:00
3:00 - 4:00	1	1	1	0	0	0	0	0	0	0	0	00:00:16	00:00:00	00:00:16
4:00 - 5:00	0	0	0	0	0	0	0	0	0	0	0	00:00:00	00:00:00	00:00:00
5:00 - 6:00	1	1	1	0	0	0	0	0	0	0	0	00:00:16	00:00:00	00:00:16
6:00 - 7:00	0	0	0	0	0	0	0	0	0	0	0	00:00:00	00:00:00	00:00:00
7:00 - 8:00	0	0	0	0	0	0	0	0	0	0	0	00:00:00	00:00:00	00:00:00
8:00 - 9:00	0	0	0	0	0	0	0	0	0	0	0	00:00:00	00:00:00	00:00:00
9:00 - 10:00	0	0	0	0	0	0	0	0	0	0	0	00:00:00	00:00:00	00:00:00

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.



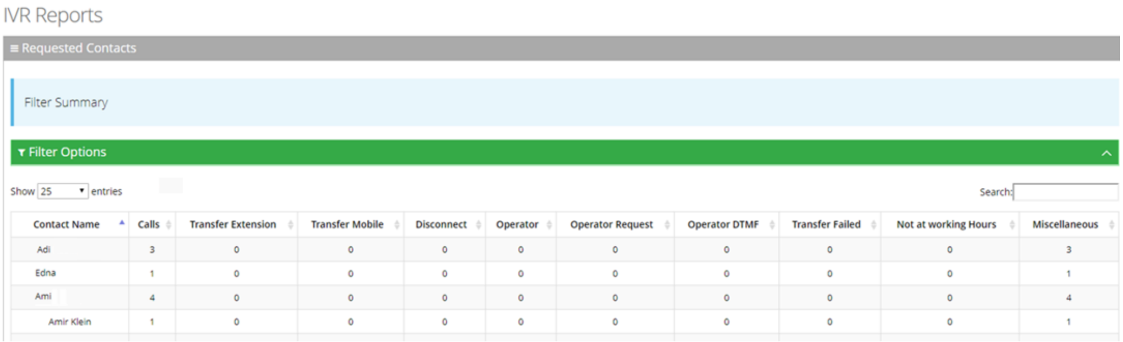
2. Select the appropriate filter fields:
   - **Date From:** Defines this report for a specific date/time range.
   - **Date To:** Defines this report for a specific date/time range.
   - **Menu:** Defines information that related to specific menu or “Any’.

- **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.



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

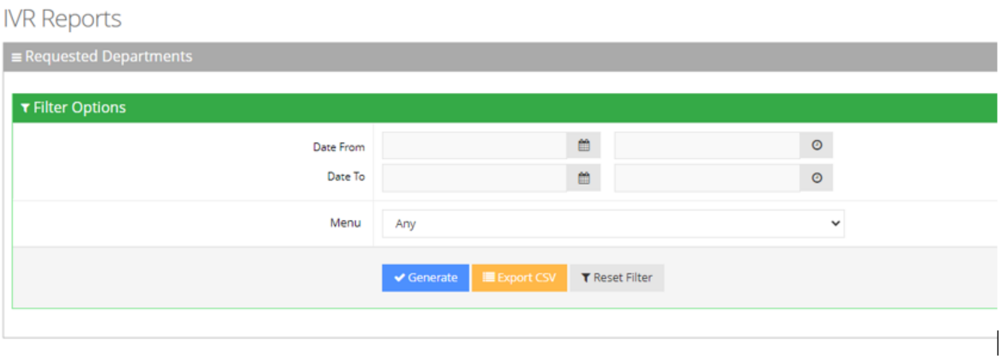
Requested Departments Report

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



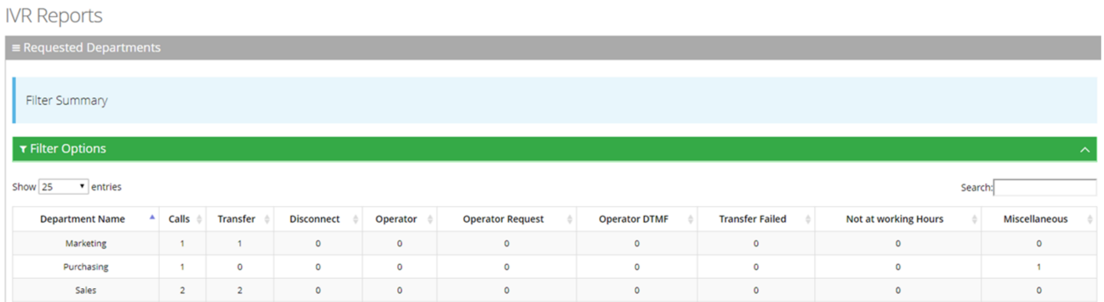
2. Select the appropriate filter fields:

   - **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.



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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