

Voca Conversational Interaction Center

Version 12.2



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Date Published: May-11-2026

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Related Documentation

Document Name
Voca CIC Release Notes
Voca CIC Flow Designer User's Manual
Voca CIC Worker & Supervisor Application User's Manual
Voca CIC Flex Application User's Manual

Document Revision Record

LTRT	Description
28857	Updated for version 12.2

Software Revision	Release Date
12.2	April 2026

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1 Introduction

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

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

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

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

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

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

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

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

About this Guide

This guide is intended for Super Administrators responsible for administering the enterprise telephony system. In this guide we describe how to configure and manage Service Providers.

Voca Benefits

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

- Built-in, multi-language, Conversational AI
- No-code IVR flow designer
- Actionable call queuing
- Teams presence-based routing
- Skill-based routing

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

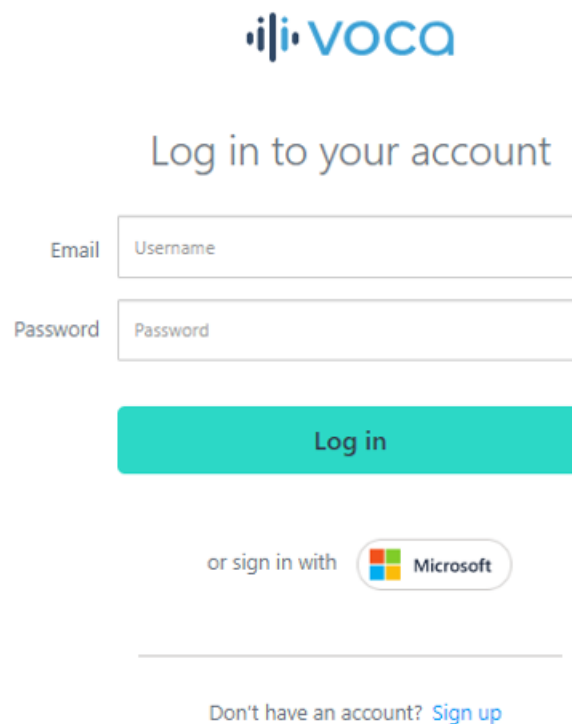
2 Getting Started

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

Logging in to Voca

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

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



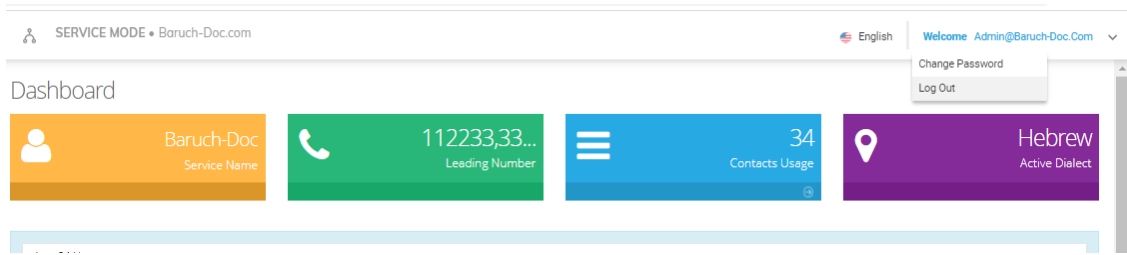
The image shows the Voca login interface. At the top is the Voca logo, which consists of a stylized 'i' icon followed by the word 'VOCA' in blue. Below the logo is the heading 'Log in to your account'. There are two input fields: the first is labeled 'Email' and contains the placeholder text 'Username';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

Changing your Password

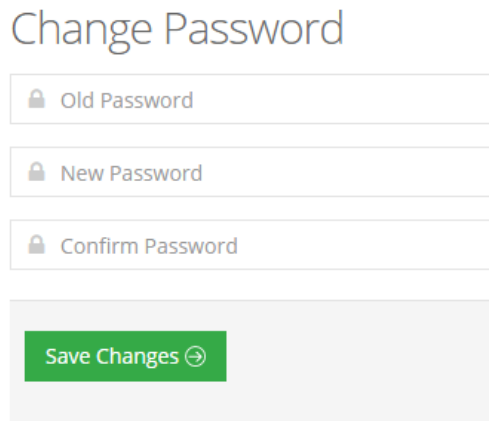
The procedure below describes how to change the login password.

➤ **To change the login password:**

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

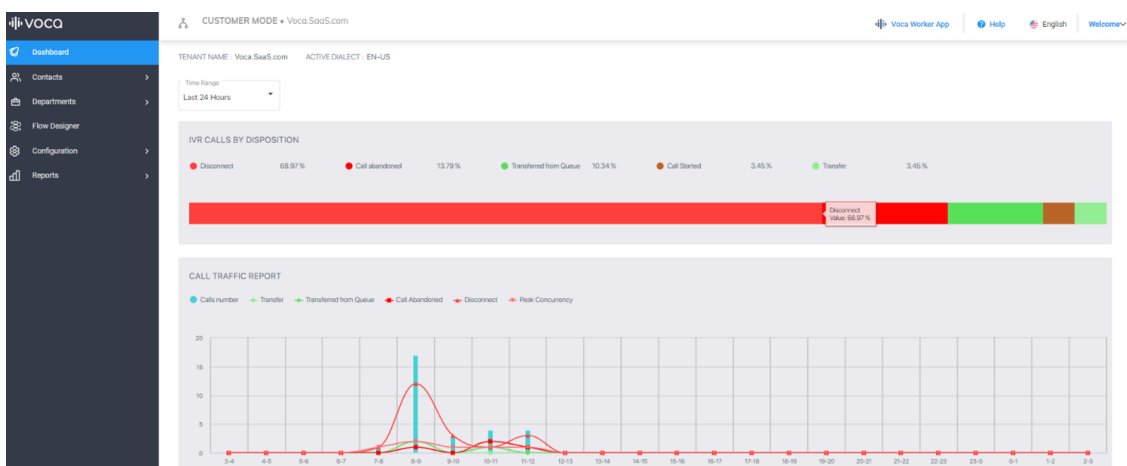


2. Select **Change Password** to change the password after initially logging in using the default (recommended); the following appears:



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:

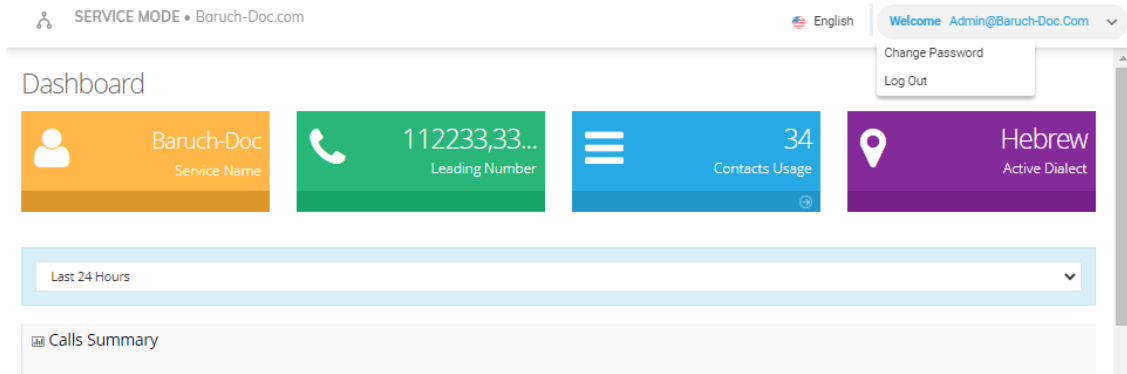
- Last 24 hours
- Last week
- Last month

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**).

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

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

New Contact

☰ New Contact - Step 1 of 2

1 Contact Details 2 Confirm

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

Provide Contact Details

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

DECT

[+ More Contacts](#)

[Continue](#)

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

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



- DECT is only available if the Administrator has configured it for a specific customer/service.
- Every contact must have a unique User ID (UID).

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

New Contact

☰ New Contact - Step 2 of 2

1 ✓ Contact Details 2 Confirm

Once the "Save Information" button is pressed, the list of contact(s) above will be added to the system.

Confirm Information

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

[⏪ Back](#)
[Save Information](#)

Figure 3-1:

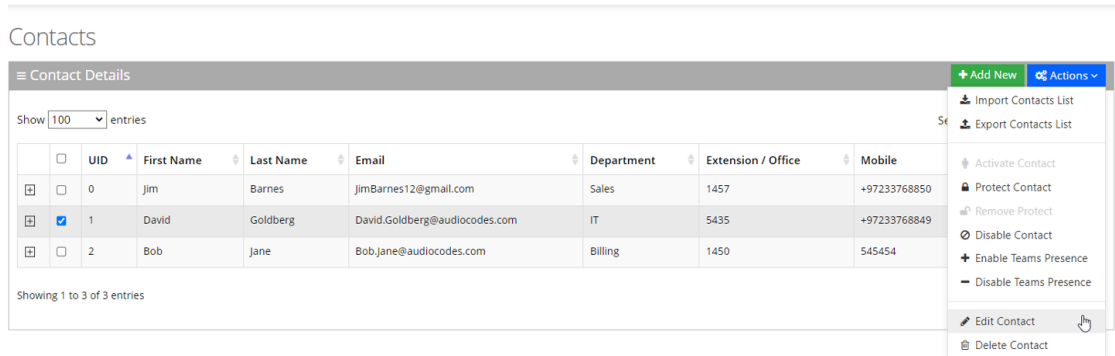
5. Click **Save Information**.

Editing a Contact

The procedure below describes how to edit a contact.

➤ **To edit a contact:**

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



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

Edit Contact

General Settings

First Name*

Last Name*

Department

Email/Teams URI

Teams Presence-Based Routing

Extension

Mobile

DECT

DTMF Routing key

Aliases

+

Save Changes

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

Creating an Alias for a Contact

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

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

The alias for the contact can be configured for:

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

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

➤ To create an alias for a contact:

1. Open the Edit Contact 1 of 2 screen (**Contacts > Contacts List**).
2. Select the contact you wish to edit by selecting the corresponding check box.
3. From the 'Actions' drop-down menu, choose **Edit Contact**.
4. Under the **Alias** group, click + sign; the following example appears:

General Settings

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

Aliases


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

Edit Contact

General Settings

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

Aliases

7. For more aliases, click the  sign.

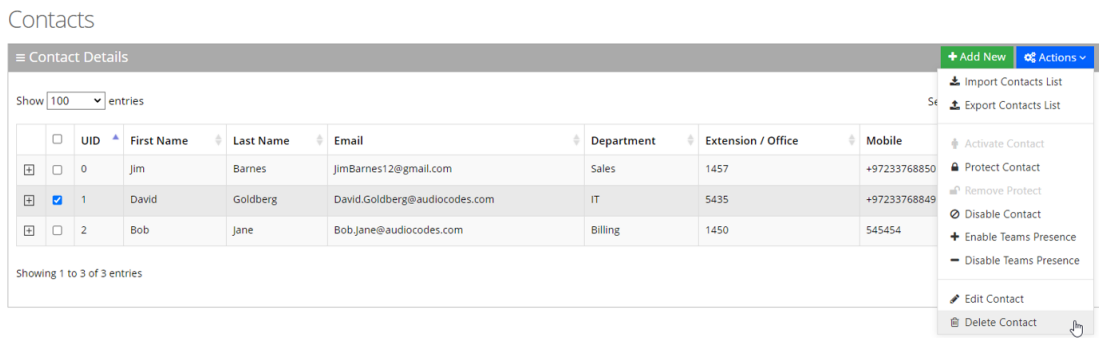
7. Click **Save Changes**.

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:**

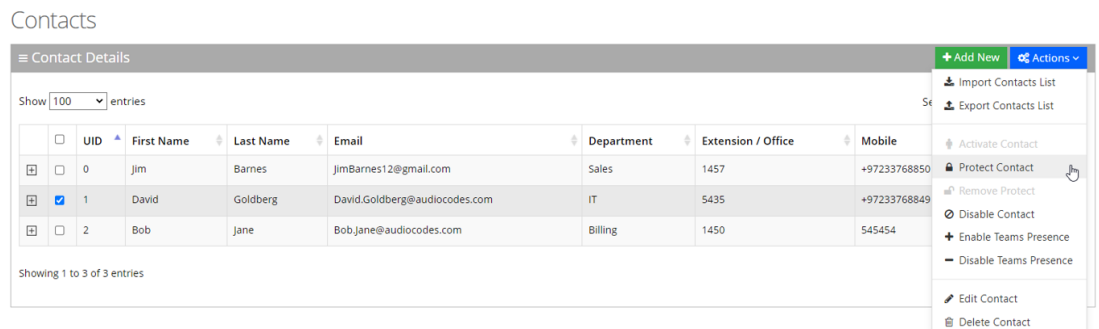
1. Open the Contacts menu (**Contacts** > <department Dictionary name>).
2. Click on the **Contact List** menu.
3. Enter the search criteria in the Search field; the searched data is displayed.

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".

Contacts

≡ Contact Details + Add New ⚙ Actions

Show entries Search:

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

Showing 1 to 3 of 3 entries < 1 >

Removing Protection from a Contact

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

➤ **To remove protection from a contact:**

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

Contacts

≡ Contact Details + Add New ⚙ Actions

Show entries Search:

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

Showing 1 to 3 of 3 entries

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

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

Contacts

≡ Contact Details + Add New ⚙ Actions

Show entries Search:

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

Showing 1 to 3 of 3 entries < 1 >

Activating a Contact

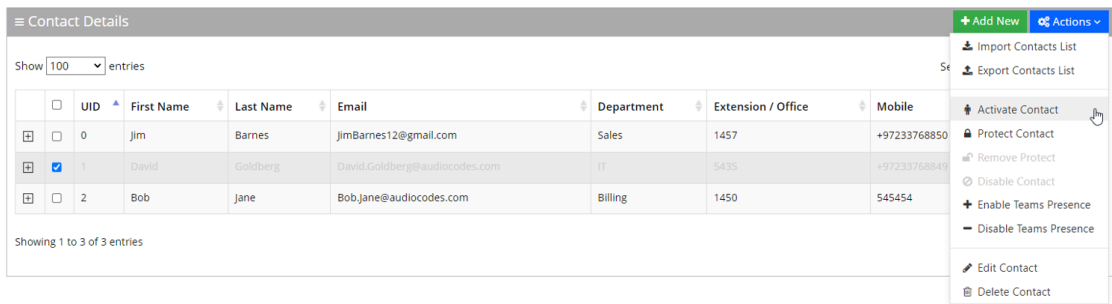
When a contact is created, it is activated (enabled) by default. The procedure below describes how to activate a contact, in case it was disabled.

➤ **To activate a contact:**

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

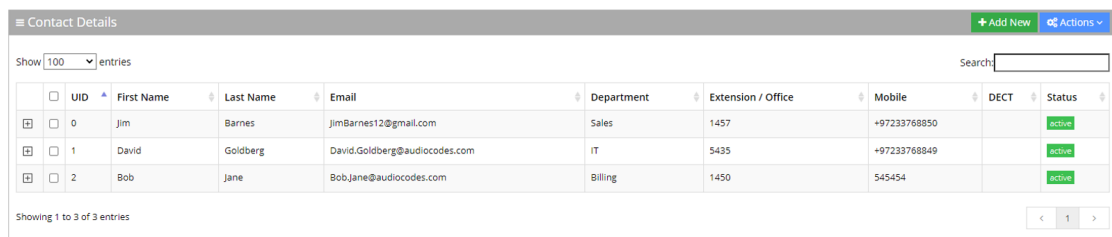
2. Select the contact you wish to activate by selecting the 'Contact' check box.

Contacts



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

Contacts



Disabling a Contact

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

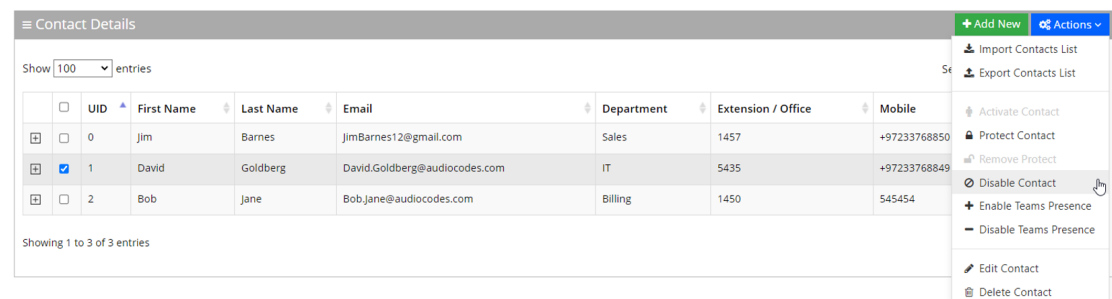
When a "disabled" contact calls the system, it will be recognized as non-employee caller.

The procedure below describes how to disable a contact.

➤ **To disable a contact:**

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

Contacts



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

Contacts

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

Importing and Exporting Contact List

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

Contacts

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

Importing Contact Information

The procedure below describes how to import Contact information.

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

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

Import Contacts List ✕

Import your contacts list from **CSV** or **Excel** files

Incremental Mode

Overwrite empty contacts aliases

Encoding:

No file chosen

The best starting point

Use an empty template

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

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

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

Pre-Import Report

≡ Pre-Import Details

Notice: The system is currently pending for action

Status	Records	Preview
New Entity	52	
Items that will be enabled (Already Exist)	0	
Update	0	
No Change	0	
Items to be disabled	0	

✔ Confirm Import
✘ Cancel Import

- This report lists the status of the contracts to be imported. In the example above, 52 new contacts are ready to be imported. Clicking the **Preview** icon displays these new contacts before they are imported. If there is an update to an existing contact, click the **Preview** icon. The contact (before the update) appears with a pink background, while the updated contact appears with a green background.

Pre-Import Report

≡ Pre-Import Details

Notice: The system is currently waiting for action

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

≡ Update
✕

Show | 25 | entries Search:

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

Showing 1 to 4 of 4 entries < 1 >

✔ Confirm Import
✘ Cancel Import

- 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.

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


Contacts

☰ Contact Details

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

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

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



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

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

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

Exporting Contact Information

The procedure below describes how to export contact information.

➤ **To export contact information:**

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

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:

New Employee

≡ New Employee - Step 2 of 2

1 ✓ Employee Details

Confirm Information

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

← Back Save Information →

5. Click **Save Information**.

4 Managing Departments

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

The Administrator can manage the department in the following ways:

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

Using the Dictionary List

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

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

Adding Department Dictionary

The procedure below describes how to add a department dictionary.

➤ To add a department dictionary:

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

New Department Dictionary

☰ New Department Dictionary - Step 1 of 2

1 Department Details

2 Confirm

Provide Department Dictionary Details

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

+ More Dictionary

Continue

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

4. Enter the required fields.

New Department Dictionary

≡ New Department Dictionary - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Dictionary Details

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

+ More Dictionary

Continue

5. Click **Continue**.

6. Click **Save Information**.

Editing Department Dictionary

The procedure below describes how to edit a Department dictionary.

➤ **To edit a department Dictionary:**

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

Departments

≡ Dictionary List + Add New Actions

Show 100 entries

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

Showing 1 to 2 of 2 entries

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**.

Departments

Dictionary List

Show 100 entries

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

Showing 1 to 2 of 2 entries

Adding a Department Manually

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

➤ To add a department manually:

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

Default - Departments

<input type="checkbox"/>	Department Name	Parent Department	Extension	Time of Day Routing Type	Working Hour Set	Actions	Status
<input type="checkbox"/>	Default			Non Working Hours (always on)	-		active

Showing 1 to 1 of 1 entries

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

New Department

New Department - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Details

UID Department Name Extension Parent Department

+ More Departments

Continue

New Department

New Department - Step 1 of 2

1 Department Details 2 Confirm

Provide Department Details

UID Department Name Extension Parent Department

+ More Departments

Continue

4. Under the **Provide Department Details** group, enter the following:

- UID
- Department Name
- Extension
- Parent Department

5. Enter the required fields.

1
Department Details

2
Confirm

Provide Department Details

UID	Department Name	Extension	Parent Department
<input type="text" value="ABC"/>	<input type="text" value="Human Resources"/>	<input type="text" value="4000"/>	<input type="text"/>

+ More Departments

Continue ↻

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

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

Editing a Department

The procedure below describes how to edit a department.

➤ **To edit a department:**

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

Default - Departments

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

Showing 1 to 7 of 7 entries

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

Edit Department

General

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

Actionable Working Hours

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

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

Time of Day Routing Type Working Hours vs. Non Working Hours ▾

Working Hour Set Default ▾

Actionable Working Hours

Action 1 Transfer to Extension ▾ Data 4242

Actionable Non-Working Hours

Action 1 Go to menu ▾ Data Default Speech Menu ▾

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

Time of Day Routing Type Actionable Working Hours (with shifts) ▾

Working Hour Set wh_shifts ▾

Actionable Working Hours

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

Actionable Non-Working Hours

Action 1 Transfer to Extension ▾ Data 5205

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

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

Actions

Action 1 Data

Activate Non-Work

Prompts

File Options

Aliases

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

Configuring Department Prompts

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

➤ To use the default department prompt:

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

Edit Department

General

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

Actionable Working Hours

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

Actionable Non-Working Hours

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

Prompts

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

Aliases

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

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

➤ To upload a prompt:

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

Prompts

File Options Upload

File Name*

File Description*

File Upload*

Aliases +

Save Changes

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

Prompts

File Options Upload

File Name*

File Description*

File Upload* Choose File

Aliases +

Save Changes

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



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

➤ **To record a prompt:**

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

Prompts

File Options Record

File Name*

File Description*

File Record* Record Stop Play Download

Aliases +

Save Changes


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

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

Creating Keywords for a Department

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

➤ To create a keyword for a department:


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


Keywords 

Save Changes

6. Enter the keyword name(s).

Keywords 

Marc 

Marc_Dept 

Save Changes

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

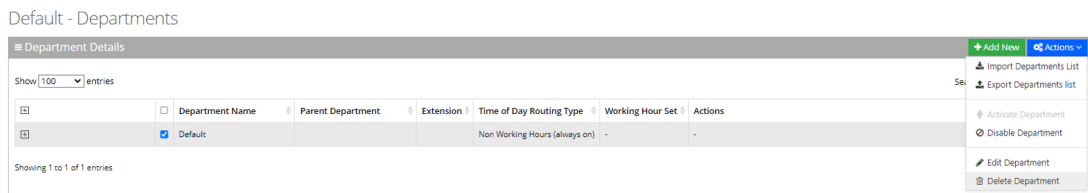
Deleting a Department

The procedure below describes how to delete a department.

➤ To delete a department:

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

3. Select the department you wish to delete.
4. From the 'Actions' drop-down menu, choose **Delete Department**.



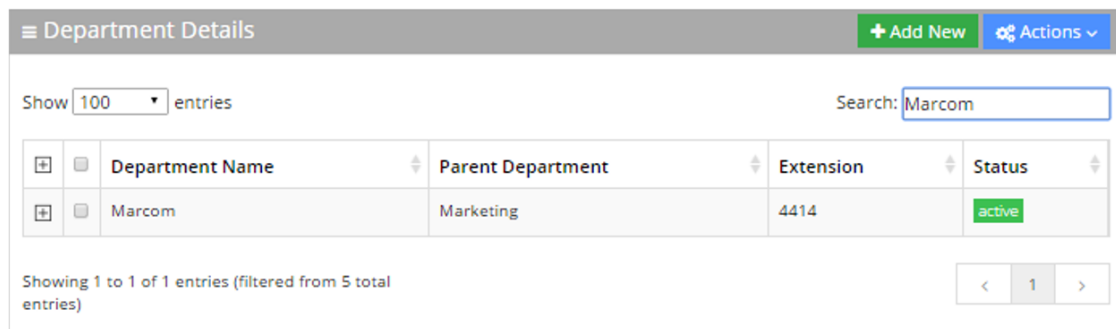
5. The following message appears: 'Are you sure you want to delete the selected department (s)?'
6. Click **OK** to delete the selected department.

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.

Departments

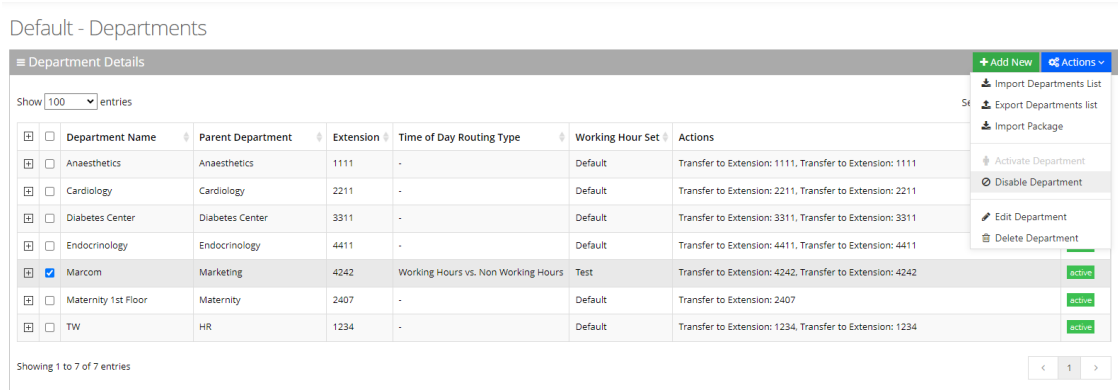


Disabling a Department

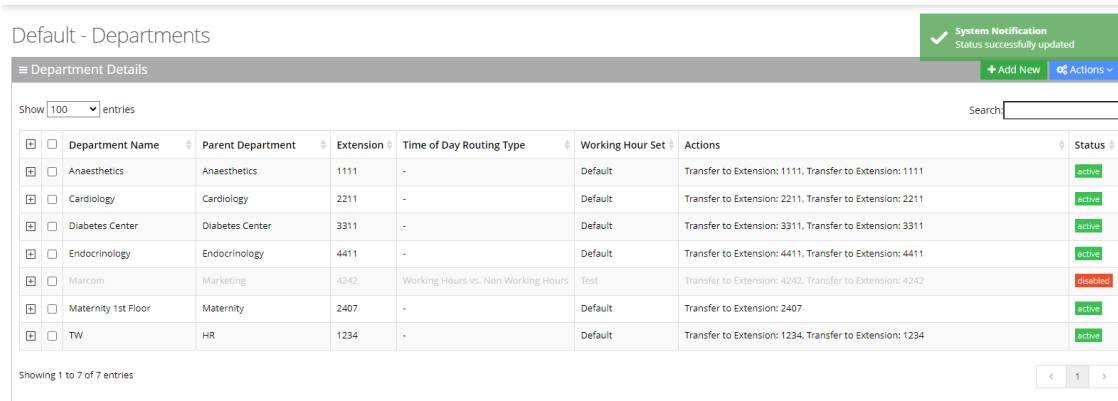
The procedure below describes how to disable a department.

- **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**.



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



Activating a Department

The procedure below describes how to activate a department.

➤ **To activate a department:**

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

Default - Departments

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

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

Default - Departments

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

Searching for a Keyword

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

Department Keywords

Keywords	Departments	Action
Marc_Dept	Marcom	Add keyword to a department

Importing/Exporting Department List

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

Default - Departments

Department Details

Show 100 entries

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
Human Resources	Management	1234	Non Working Hours (always on)	-	-
Marcom	Marketing	4242	Working Hours vs. Non Working Hours	Test	Transfer to Extension: 4242, Transfer to Extension: 4242
Maternity 1st Floor	Maternity	2407	-	Default	Transfer to Extension: 2407
TW	HR	1234	-	Default	Transfer to Extension: 1234, Transfer to Extension: 1234

Showing 1 to 8 of 8 entries

Importing Department Information

The procedure below describes how to import department information.

➤ **To import department information:**

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

Import Departments List
✕

Import your departments list from **CSV** or **Excel** files

Incremental Mode

Overwrite empty departments aliases

Encoding: UTF-8

Choose File No file chosen

The best starting point

Use an empty template


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

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

Cancel
Import Departments List

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

Pre-Import Report

Pre-Import Details		
Notice: The system is currently pending for action		
Status	Records	Preview
New Entity	52	
Items that will be enabled (Already Exist)	0	
Update	0	
No Change	0	
Items to be disabled	0	
<input checked="" type="button" value="Confirm Import"/> <input type="button" value="Cancel Import"/>		

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

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:

Default - Departments

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

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:

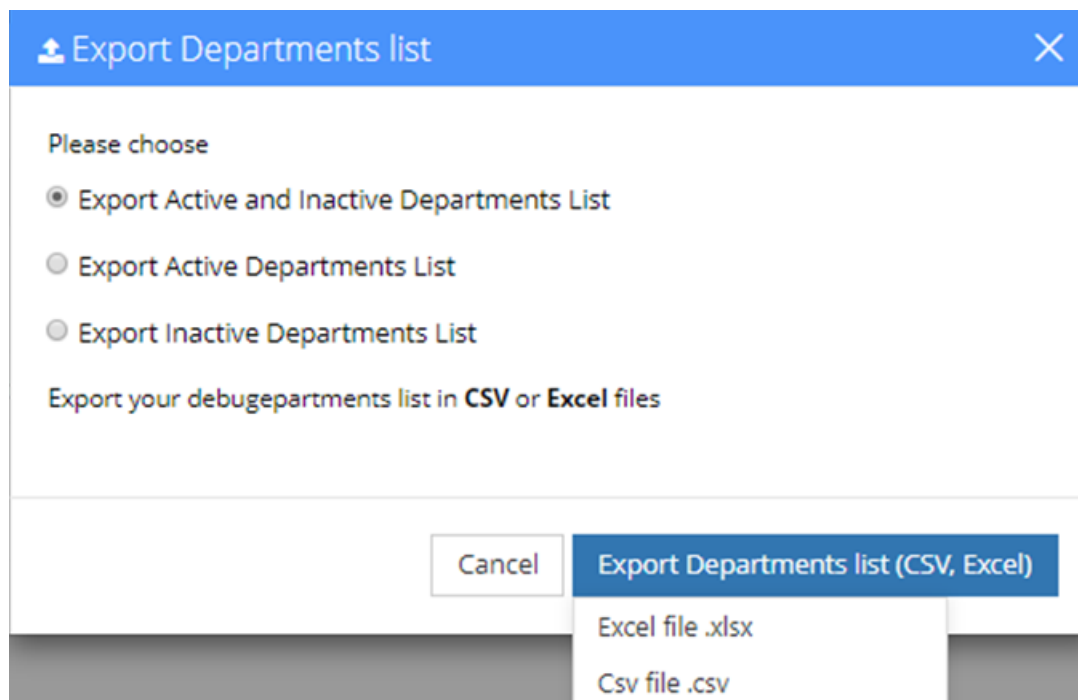
	A	B	C	D
1	UID	Department Name	Extension	Aliases
2				
3				

Exporting Department Information

The procedure below describes how to export department information.

➤ To export department information:

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



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:

- [Interaction Manager](#)
- [Prompts](#)
- [Menu Settings](#)
- [Routing](#)
- [Working Hours](#)
- [Events & Holidays](#)
- [System Settings](#)
- [Access Management](#)
- [Dial Plan Settings](#)

Configuring Interaction Manager

- [Configuring Voice Settings](#) below
- [Configuring Email Interaction Settings](#) on page 48
- [Configuring Chat Interaction Settings](#) on page 53

Configuring Voice Settings

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

➤ To view voice settings:

1. Open the Voice Settings screen (**Configuration > Interaction Manager > Voice**); the following appears.

Voice Settings

Flow Settings Details + Add New Actions

Show 100 entries Search:

<input type="checkbox"/>	DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
<input type="checkbox"/>	445566	Main	UTC -5 DST	Actionable Working Hours	Shifts	Default
<input type="checkbox"/>	+130163	SNOW Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+144075	EDU Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+178655	IT Helpdesk Flow	UTC -5 DST	Working Hours (always on)	-	Default

Showing 1 to 4 of 4 entries < 1 >

The Voice 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 150)

Adding a Flow Setting

The procedure below describes how to add a flow setting.

➤ To add a flow setting:

1. Open the Voice Settings page (**Configuration > Interaction Manager > Voice**); the following appears.

Voice Settings

≡ Flow Settings Details + Add New Actions ▾

Show 100 entries Search:

<input type="checkbox"/>	DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
<input type="checkbox"/>	445566	Main	UTC -5 DST	Actionable Working Hours	Shifts	Default
<input type="checkbox"/>	+130163	SNOW Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+144075	EDU Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+178655	IT Helpdesk Flow	UTC -5 DST	Working Hours (always on)	-	Default

Showing 1 to 4 of 4 entries < 1 >

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

Add Voice Settings

DNIS Name

DNIS Number* Operator Connect / Microsoft calling plan

Time Zone
 (UTC -4:00 DST) Eastern Time ▼

Time of Day Routing Type
 Working Hours (always on) ▼

Events & Holidays*
 Default ▼

Actions

Action 1
 Go-to menu ▼

Data
 DTMF Menu ▼

Save Changes

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



If you are using Operator Connect or Microsoft calling plan, select the check box. A Microsoft window appears prompting you to enter the designated Microsoft Teams user created for this integration. See [Appendix DNIS Number for OC MCP.htm](#).

- 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.
- 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.

Add Voice Settings

DNIS Number*	<input type="text" value="445566"/>
DNIS Name	<input type="text" value="Main"/>
Timezone	<input type="text" value="(UTC -5:00 DST) Central Time"/>
Time of Day Routing Type	<input type="text" value="Actionable Working Hours"/>
Working Hours Set	<input type="text" value="Shifts"/>
Events & Holidays*	<input type="text" value="Default"/>

Actionable Working Hours

—	Sunday	08:00	12:00		
Action 1	<input type="text" value="Go-to menu"/>			Data	<input type="text" value="DTMF Menu"/>
—		13:00	19:00		
Action 1	<input type="text" value="Go-to menu"/>			Data	<input type="text" value="DTMF Menu"/>

Actionable Non-Working Hours

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

[Save Changes](#)

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

Actionable Working Hours

— Tuesday 00:00 12:59

Action 1 Data

— 13:00 23:45

Action 1 Data

Actionable Non-Working Hours

Action 1 Data

Actionable Working Hours - Non-Emp.

— Tuesday 00:00:00 12:59:59

Action 1 Data

— 13:00:00 23:45:59

Action 1 Data

Actionable Non-Working Hours - Non-Emp.

Action 1 Data

[Save Changes](#)

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

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

Editing a Flow Setting

The procedure below describes how to edit Email Interaction Settings.

➤ **To edit Flow Settings:**

1. Open the Voice Settings page (**Configuration > Interaction Manager > Voice**); the following appears:

Voice Settings

Flow Settings Details [+ Add New](#) [Actions](#)

Show entries Search

<input type="checkbox"/>	DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
<input type="checkbox"/>	445566	Main	UTC -5 DST	Actionable Working Hours	Shifts	Default
<input type="checkbox"/>	+130163	SNOW Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+144075	EDU Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+178655	IT Helpdesk Flow	UTC -5 DST	Working Hours (always on)	-	Default

Showing 1 to 4 of 4 entries < 1 >

2. Select the voice interaction check box that you want to edit.

Flow Settings Details						
DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays	
<input checked="" type="checkbox"/> 445566	Main	UTC -5 DST	Actionable Working Hours	Shifts	Default	
<input type="checkbox"/> +13016378459	SNOW Flow	UTC -5 DST	Working Hours (always on)	-	Default	
<input type="checkbox"/> +14407501944	EDU Flow	UTC -5 DST	Working Hours (always on)	-	Default	
<input type="checkbox"/> +17865503711	IT Helpdesk Flow	UTC -5 DST	Working Hours (always on)	-	Default	

Showing 1 to 4 of 4 entries

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

Edit Voice Settings

DNIS Number*

DNIS Name

Timezone

Time of Day Routing Type

Working Hours Set

Events & Holidays*

Actionable Working Hours

— Sunday 08:00 12:00

Action 1 Data

— 13:00 19:00

Action 1 Data

Actionable Non-Working Hours

Action 1 Data

- Edit the fields you want to change.
- Click **Save Changes**.

Deleting a Flow Setting

The procedure below describes how to delete a Flow setting.

➤ **To delete a Flow setting:**

- Open the Voice Settings Details page (**Configuration > Interaction Manager > Voice**).

Voice Settings

Flow Settings Details + Add New Actions

Show 100 entries Search:

<input type="checkbox"/>	DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
<input type="checkbox"/>	445566	Main	UTC -5 DST	Actionable Working Hours	Shifts	Default
<input type="checkbox"/>	+130163	SNOW Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+144075	EDU Flow	UTC -5 DST	Working Hours (always on)	-	Default
<input type="checkbox"/>	+178655	IT Helpdesk Flow	UTC -5 DST	Working Hours (always on)	-	Default

Showing 1 to 4 of 4 entries < 1 >

2. Select the Flow Setting you want 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.

Keyword to Department Mapping

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

➤ **To add a keyword to a department:**

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

Department Keywords

Department Keywords

Keywords and the departments to which they are mapped

Show 100 entries Search:

Keywords	Departments	Action
Marc	Marcom	Add keyword to a department
Marc_Dept	Marcom	Add keyword to a department

Showing 1 to 2 of 2 entries < 1 >

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

Add keyword to department

select department:

HR
▼

HR

Logistics

Marcom




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

Department Keywords

Department Keywords

Keywords and the departments to which they are mapped

Show 100 entries Search:

Keywords	Departments	Action
Marc	 	Add keyword to a department
Marc_Dept		Add keyword to a department

Showing 1 to 2 of 2 entries < 1 >

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




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

Department Keywords

Department Keywords

Keywords and the departments to which they are mapped

Show 100 entries Search:

Keywords	Departments	Action
Marc	 	Add keyword to a department
Marc_Dept		Add keyword to a department

Showing 1 to 2 of 2 entries < 1 >

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

- Click **OK**.

Configuring Email Interaction Settings

Use Voca CIC's Email channel support to route emails efficiently and have your workers handle them easily, with controlled distribution, routing and real-time analytics.

Email settings are available for Digital Engagement Tenants.

The procedure below describe how to view and configure email settings.



Before performing the below configuration, make sure that you have configured Omnichannel settings in the System Settings section.

➤ **To view email settings:**

1. Open the email Settings screen (**Configuration > Interaction Manager > Email**); the following appears:

Email Interaction Settings

Email Interaction Settings			+ Add New	⚙ Actions
<input type="checkbox"/>	Interaction Name	Email Account	Enable/Disable	
<input type="checkbox"/>	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable	
<input type="checkbox"/>	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled	
<input type="checkbox"/>	SW Support	Software_Support@audiocodes.com	Enable	

- 'Interaction Name': Defines the name of the Email interaction.
- 'Email Account': Defines the email account for the interaction.
- Enable / Disable: An enabled interaction pulls emails from the email account into Voca.

Adding Email Interactions

The procedure below describes how to add Email Interaction settings.

➤ **To add email Interaction Settings:**

1. Open the Email Settings page (**Configuration > Interaction Manager > Email**).

Email Interaction Settings

Email Interaction Settings			+ Add New	⚙ Actions
<input type="checkbox"/>	Interaction Name	Email Account	Enable/Disable	
<input type="checkbox"/>	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable	
<input type="checkbox"/>	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled	
<input type="checkbox"/>	SW Support	Software_Support@audiocodes.com	Enable	

2. Click **Add New**.

Add Email Interaction Settings

Enable/Disable

Interaction Name*

Email Account*

Friendly Name*

Auto Response Message

Email Routing Logic

Priority	Rule Name	Subject Keywords	Match/Contains	Queues	Skills
Default:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Save Changes](#)

3. Click the 'Enable/ Disable' toggle button to enable the pulling of emails from the configured email account into Voca.
4. In the 'Interaction Name' field, type the name of the interaction.
5. In the 'Email Account' field, type the email address that is used for this interaction to receive and send emails.
6. In the 'Friendly Name' field, define the identification name of the sender, which is displayed in an email client.
7. In the 'Auto Response Message' field, type the message that is automatically sent to the customer when they send an email.
8. The **Email Routing Logic** section configures rules that connect commonly used phrases sent to the email account with queues and skills:
 - a. In the 'Priority' field, order routing logics by drag and drop to define which matches are checked first.
 - b. In the 'Subject Keywords' field, type commonly used phrases (one or more) that should be routed to the same queues and skills.



Press Enter in the text field for each phrase to save the entry.

- c. In the 'Match/Contains' drop-down list, select whether matches are based on exact or contains method.
 - ◆ **Exact Match:** a partial phrase is not considered a match.

- ◆ **Contains:** a partial phrase is considered a match.
 - d. In the 'Queues' drop-down list, select the queue to where you want the email routed.
 - e. In the 'Skills' drop-down list, select the skills that the Worker should have to receive the email.
9. Click **Save Changes**.
 10. After configuring the 'Omnichannel' email server integration on the System Setting page (see [Omnichannel Configuration](#) on page 166), configure the following PowerShell commands on the customer's Azure tenant to enable email interaction with a specific email mailbox:

```
Connect-ExchangeOnline -Organization
```

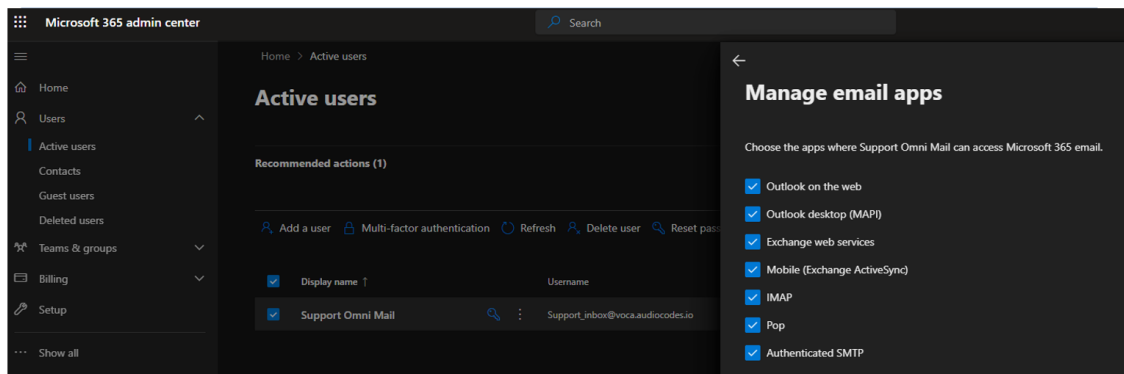
The following command is a one-time configuration; there is no need to configure it again if it has been configured before:

```
New-ServicePrincipal -AppId <Voca Omnichannel Email Application ID> -
  ObjectId <Voca Omnichannel Email Object ID>
```

Add the following command for each new mailbox interaction:

```
Add-MailboxPermission -Identity "Support_inbox@voca.audiocodes.io" -User
  <Voca Omnichannel Email Object ID> -AccessRights FullAccess
```

After applying the above command on the email mailbox make sure that this mailbox has the 'Authenticated SMTP' check box selected from the Admin Center page in your Azure:



Editing Email Interaction Settings

The procedure below describes how to edit Email Interaction Settings.

➤ To edit Email Interaction Settings:

1. Open the Email Interaction Settings page (**Configuration > Interaction Manager > Email**); the following appears:

Email Interaction Settings

Email Interaction Settings			+ Add New	⚙ Actions
<input type="checkbox"/>	Interaction Name	Email Account	Enable/Disable	
<input type="checkbox"/>	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable	
<input type="checkbox"/>	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled	
<input type="checkbox"/>	SW Support	Software_Support@audiocodes.com	Enable	

2. Select the email interaction check box that you want to edit.

Email Interaction Settings

Email Interaction Settings			+ Add New	⚙ Actions
<input type="checkbox"/>	Interaction Name	Email Account	Enable/Disable	
<input type="checkbox"/>	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable	
<input type="checkbox"/>	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled	
<input checked="" type="checkbox"/>	SW Support	Software_Support@audiocodes.com	Enable	

Edit Email Settings
 Delete Email Settings

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

Edit Email Interaction Settings

Enable/Disable

Interaction Name*

Email Account*

Friendly Name*

Auto Response Message

Email Routing Logic

Priority	Rule Name	Subject Keywords	Match/Contains	Queues	Skills
Default:	<input type="text" value="default"/>	<input type="text"/>	<input type="text" value="Contains"/>	<input type="text" value="IT HW & SW"/>	<input type="text" value="SW support x"/>

[Save Changes](#)

4. Edit the fields you want to change.

5. Click **Save Changes**.

Deleting an Email Interaction Setting

The procedure below describes how to delete Email Interaction Settings.

➤ **To delete Email Interaction Settings:**

1. Open the Email Interaction Settings page (**Configuration > Interaction Manager > Email**); the following appears:

Email Interaction Settings

Email Interaction Settings			+ Add New	⚙ Actions
<input type="checkbox"/>	Interaction Name	Email Account	Enable/Disable	
<input type="checkbox"/>	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable	
<input type="checkbox"/>	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled	
<input type="checkbox"/>	SW Support	Software_Support@audiocodes.com	Enable	

2. Select the email interaction check box that you want to delete.

Email Interaction Settings

Email Interaction Settings			+ Add New	⚙ Actions
<input type="checkbox"/>	Interaction Name	Email Account	Enable/Disable	
<input type="checkbox"/>	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable	
<input type="checkbox"/>	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled	
<input checked="" type="checkbox"/>	SW Support	Software_Support@audiocodes.com	Enable	

Edit Email Settings
 Delete Email Settings

3. From the 'Actions' drop-down list, choose **Delete Email Settings**.
4. Click **OK** to delete the selected item.

Configuring Chat Interaction Settings

Use Voca CIC's Chat channel support to customize a live chat widget and SMS interactions for the organization, enabling customer engagement while browsing or on mobile. Form fields, drop down menus, colors, contact reason selection, and branding are fully customizable. See below for configuration details on each.

- [Configuring Webchat Interactions](#) below
- [Configuring SMS interactions](#) on page 62

Configuring Webchat Interactions

This section describes how to view and configure webchat interaction settings and assign it to a website.

➤ **To view interaction settings:**

1. Open the Chat Interaction Settings page (**Configuration > Interaction Manager > Chat**); the following appears:

INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
IT Support	Webchat	IT	Default	Enabled

The Chat Interaction Settings page is described below:

- 'Interaction Name': Defines the interaction name.
- 'Interaction Type': Defines the interaction type, either webchat or SMS.
- 'Endpoint': the interaction points of the customer with the system. This is either the webchat domain or the SMS number.
- 'Working Hour Set': Defines which working hour set is used to define the working / non-working days / time for the flow.
- 'Status': Either 'Enable' or Disable'. An enabled interaction allows the appearance of the chat widget on the website or the SMS.

Adding Webchat Interaction Settings

The procedure below describes how to add Webchat Interaction Settings. Adding a webchat interaction setting includes the following three parts:

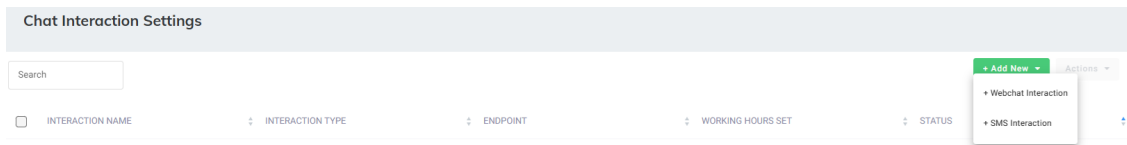
- General
- Webchat Design
- Pre-Chat

➤ To add a Webchat Interaction Setting:

1. Open the Chat Settings page (**Configuration > Interaction Manager > Chat**); the following appears:

INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
IT Support	Webchat	IT	Default	Enabled

2. Click **Add New**, and choose **+Webchat Interaction**.



The following appears, with the **General** tab displayed by default:

Add Webchat Interaction Settings

General

Enable/Disable

Webchat Name*

Customer Website Domain*

Time Zone
(UTC -11:00) Pago Pago ▼

Working Hours Set
Default ▼

Session Timeout (Minutes)
20

Automatic Responses

Welcome Greeting*
Thank you for reaching out! We will ...

Timeout Alert*

Timeout Message*

Non-Working Hours Message*

[Save Changes](#)

3. Under the **General** tab, do the following:
 - a. Click the 'Enable/ Disable' toggle switch to enable the display of the webchat on the website.
 - b. In the 'Customer Website Domain' field, type the domain of the website to connect with the webchat's widget.

- c. From the 'Time Zone' drop-down list, select the timezone associated with the webchat interaction. When interacting with this webchat, working hours, holidays and events are checked based on the timezone.
- d. From the 'Working Hours Set' drop-down list, select a working hour set to define the working / non-working days and time for the webchat interaction.
- e. In the 'Session Timeout (Minutes)' field, define the time that a customer must respond to an agent before the session is automatically closed.
- f. Under the **Automatic Responses** group, define automatic messages for different scenarios:
 - ◆ 'Welcome Greeting' field: Greet the customer when starting a new conversation.
 - ◆ 'Timeout Alert': Notify the customer that the session is about to be closed because no response has been received.
 - ◆ 'Timeout Message': Notify the customer that the session has been closed because of inactivity.
 - ◆ 'Non-Working Hours Message': Notify the customer that the chat is currently unavailable because it's outside of working hours.

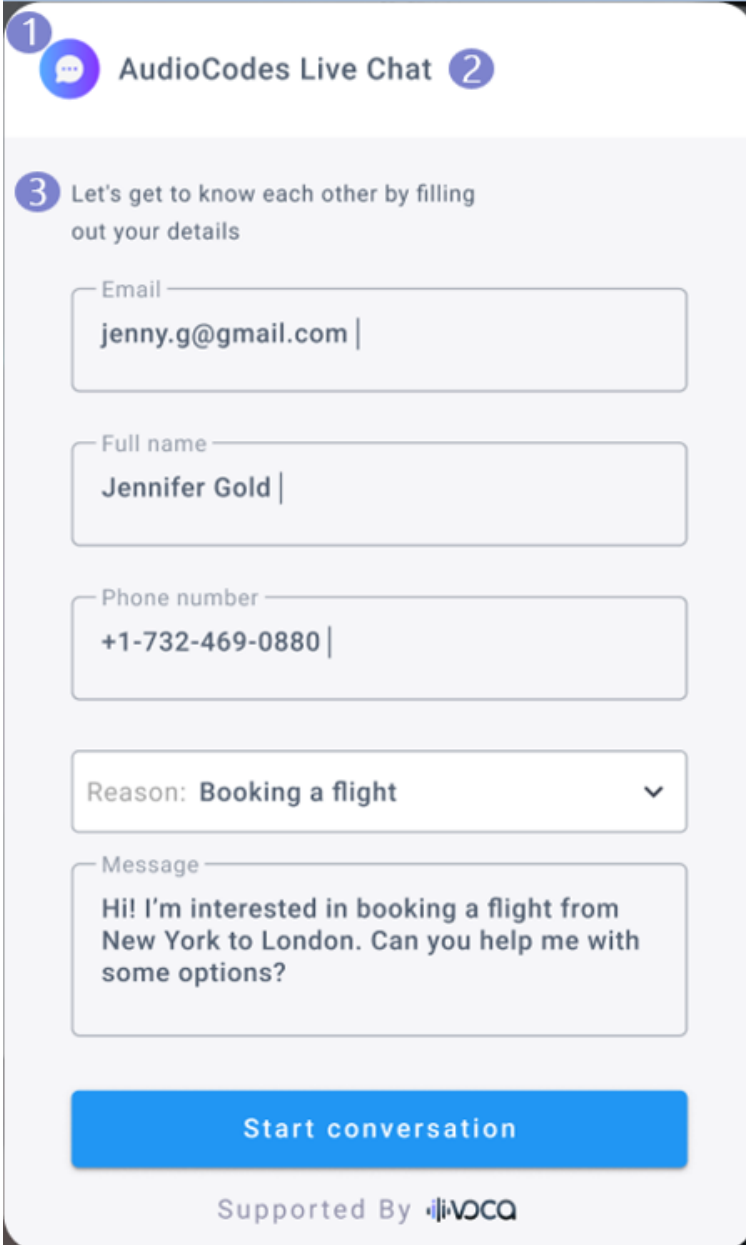
4. Select the **Webchat Design** tab; the following appears:

The screenshot shows the 'Add Webchat Interaction Settings' form with three tabs: 'General', 'Webchat Design', and 'Pre-chat'. The 'Webchat Design' tab is active. The form contains the following elements:

- Customer Logo***: A text input field with a 'Choose File' button next to it.
- Widget Title***: A text input field.
- Welcome Headline***: A text input field.
- Widget Color**: A color selection bar showing a gradient from blue to purple.
- Widget Position in Page**: A dropdown menu with 'Left' selected.

5. Define the widget's appearance:

- a. In the 'Customer Logo' field, click Choose File and then upload your organization logo (see item #1 in the example figure below).
- b. In the 'Widget' field, type the name of the widget (see item #2 in the example figure below).
- c. In the 'Welcome Headline' field, type a short webchat introduction (see item #3 in the example figure below).
- d. Click the 'Widget color' button, and then pick a widget color.
- e. From the 'Widget Position in Page' drop-down list, choose the widget's position.



The screenshot shows a mobile-style chat interface titled "AudioCodes Live Chat". It features a header with a chat icon and a title. Below the header, a message prompts the user to fill out details. The form includes input fields for Email (jenny.g@gmail.com), Full name (Jennifer Gold), and Phone number (+1-732-469-0880). A dropdown menu for "Reason" is set to "Booking a flight". A text area for "Message" contains the text: "Hi! I'm interested in booking a flight from New York to London. Can you help me with some options?". A blue "Start conversation" button is at the bottom, with the Voca logo and "Supported By" text below it.

1 AudioCodes Live Chat 2

3 Let's get to know each other by filling out your details

Email
jenny.g@gmail.com |

Full name
Jennifer Gold |

Phone number
+1-732-469-0880 |

Reason: Booking a flight

Message
Hi! I'm interested in booking a flight from New York to London. Can you help me with some options?

Start conversation

Supported By Voca

6. Select the **Pre Chat** tab; the following appears:

Add Webchat Interaction Settings

General
Webchat Design
Pre-chat

Pre Chat Form + Add new field

Required

Visible

Contact Reasons + Add new reason

Save Changes

7. Under the **Pre Chat Form** group, define the information customers should provide before starting a new conversation. Data can be viewed by an agent during the chat and in the conversation history:
 - a. In the 'Field Name' field, type a name for the field, which is displayed to the customer.
 - b. From the 'Field Type' drop-down list, select the type of input that the system expects to receive.
 - c. Click the 'Required' toggle button to turn on the field as mandatory.
 - d. Click the 'Visible' toggle button to turn on the display of the field on the widget, or turn off the toggle button to hide the field so that data is automatically pulled from signed-in users.



Implementing data extraction from hidden fields should be configured by the administrator within the provided code script.

- e. Add a new field, by clicking + **Add new field**.
8. Under the **Contact Reasons** group, define a set of contact reasons and assign them to the relevant queues and skills:
 - a. In the 'Reason' field, type a possible contact reason that is visible for the customer.
 - b. From the 'Queue Name' drop-down list, select the queue to which the email is routed.
 - c. From the 'Skills' drop-down list, select the relevant skills that the Worker should have to receive the email.
 - d. To add additional Main Contact Reasons, click the **Add new reason** button.
 - e. To delete a Main Contact Reason, click the ellipsis (...) button corresponding to the reason, and then from the drop-down menu, choose **Delete**.

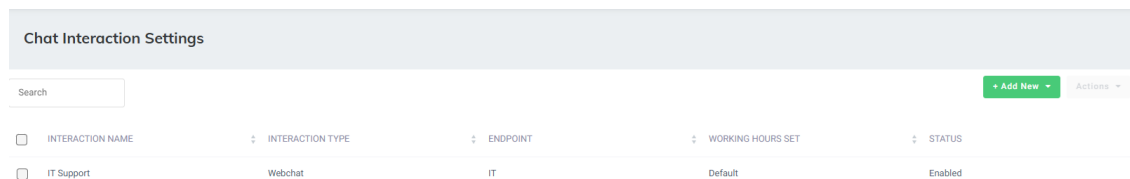
- f. To add a sub-reason to a Main Contact Reason, click the ellipsis (...) button corresponding to the reason, and then from the drop-down menu, choose **Add New**.
- g. You can add sub-reasons to sub reasons.

Connecting the Webchat Interaction to the Website

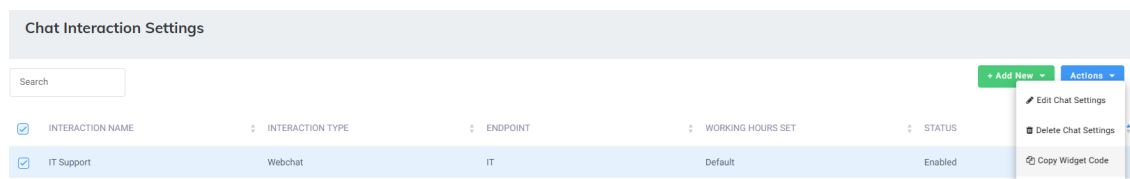
The procedure below describes how to connect the webchat widget to the website.

➤ To connect webchat widget to website:

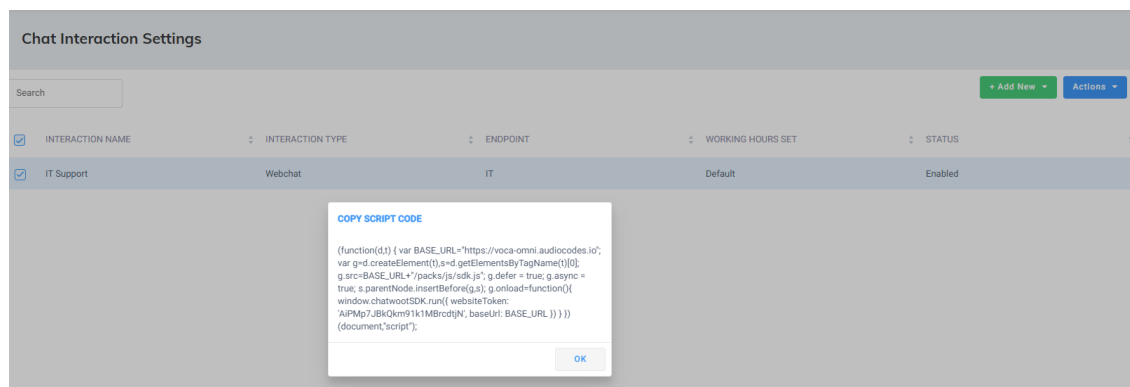
1. Open the Chat Settings page (**Configuration > Interaction Manager > Chat**); the following appears:



2. Select the Webchat interaction check box whose code you wish to copy.



3. From the 'Actions' drop-down menu, choose **Copy Widget Code** ; the following pop-up appears:



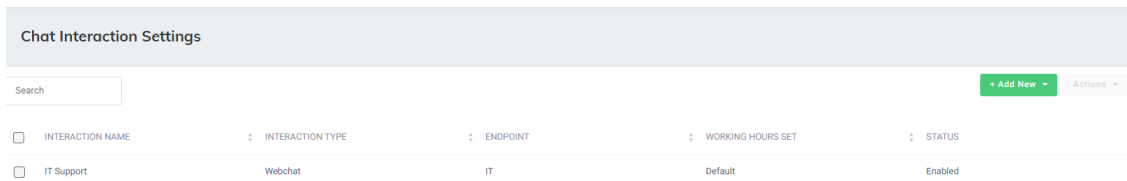
4. Copy and paste the code script into the website's HTML code.

Editing Webchat Interaction Settings

The procedure below describes how to edit Webchat Interaction Settings.

➤ **To edit a Webchat Interaction Setting:**

1. Open the Chat Interaction Settings page (**Configuration > Interaction Manager > Chat**); the following appears:

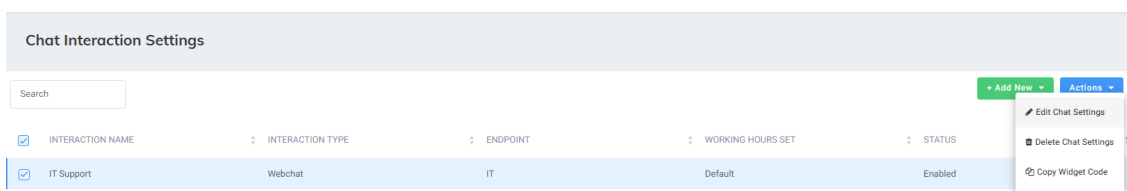


Chat Interaction Settings

Search + Add New Actions

<input type="checkbox"/>	INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
<input type="checkbox"/>	IT Support	Webchat	IT	Default	Enabled




2. Select the webchat interaction that you want to edit.



Chat Interaction Settings

Search + Add New Actions

<input checked="" type="checkbox"/>	INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
<input checked="" type="checkbox"/>	IT Support	Webchat	IT	Default	Enabled

-  Edit Chat Settings
-  Delete Chat Settings
-  Copy Widget Code

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

Edit Webchat Interaction Settings

General

Enable/Disable

Webchat Name*
Jira Support


Customer Website Domain*
IT


Time Zone
(UTC -11:00) Pago Pago


Working Hours Set
Default


Session Timeout (Minutes)
20

Automatic Responses

Welcome Greeting*
Thank you for reaching out! We will ... 

Timeout Alert*
The session is about to be closed b... 

Timeout Message*
The session has been closed becau... 

Non-Working Hours Message*
The chat is currently unavailable be... 

[Save Changes](#)

4. Edit the fields you want to change.

5. Click **Save Changes**.

Deleting Chat Interaction Settings

The procedure below describes how to delete Webchat Interaction Settings.

➤ **To delete a Webchat Interaction Setting:**

1. Open Chat Interaction Settings page (**Configuration > Interaction Manager > Chat**); the following appears:



2. Select the webchat interaction check box that you want to delete.




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

4. Click **OK**.

Configuring SMS interactions

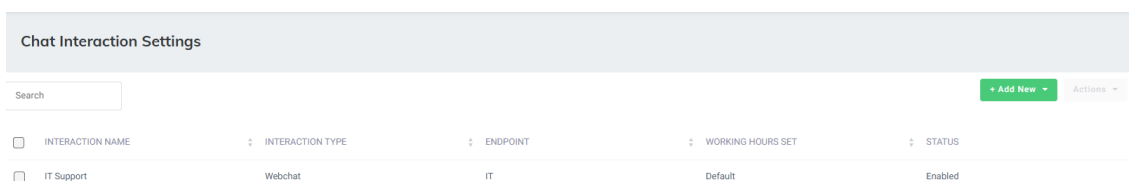
This section describes how to view and configure the SMS interactions.



You must configure SMS settings, in the System Settings *before* adding an SMS interaction. For details, see [Configuring Omnichannel settings for SMS](#).

➤ **To view interaction settings:**

1. Open the Chat Interaction Settings page (**Configuration > Interaction Manager > Chat**); the following appears:



The Chat Interaction Settings page is described below:

- 'Interaction Name': Defines the interaction name.
- 'Interaction Type': Defines the interaction type, either webchat or SMS.
- 'Endpoint': the interaction points of the customer with the system. This is either the webchat domain or the SMS number.

- 'Working Hour Set': Defines which working hour set is used to define the working / non-working days / time for the flow.
- 'Status': Either 'Enable' or 'Disable'. An enabled interaction allows the appearance of the chat widget on the website or the SMS.

Adding SMS interactions



You must configure SMS settings, in the System Settings, *before* adding an SMS interaction. For details, see [Configuring Omnichannel settings for SMS](#).

➤ To add an SMS Interaction Setting:

1. Open the Chat Settings page (**Configuration > Interaction Manager > Chat**); the following appears:

Chat Interaction Settings					
INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS	
<input type="checkbox"/> IT Support	Webchat	IT	Default	Enabled	

2. Click **Add New**, and choose **+SMS Interaction**.

Chat Interaction Settings					
INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS	
<input type="checkbox"/>					+ Add New + Webchat Interaction + SMS Interaction

The following appears, with the **General** tab displayed by default:

Add SMS Interaction Settings

General

Enable/Disable

Interaction Name*

SMS Number*

Friendly Name*

Time Zone
(UTC -11:00) Pago Pago

Working Hours Set
Default

Session Timeout (Minutes)
20

Automatic Responses

Welcome Message*

Thank you for reaching out! We will ...



Timeout Alert*



Timeout Message*



Non-Working Hours Message*



Save Changes

3. Under the **General** tab, do the following:
 - a. Click the 'Enable/ Disable' toggle switch to enable the SMS interaction.
 - b. In the 'Interaction Name' field, type the name of the interaction.
 - c. In the 'SMS Number' field, type the phone number that receives the SMS messages. This phone number connects between the SMS inbox settings and the customer's interaction.



This SMS number must be supported by the SMS service provider.

- d. In the 'Friendly Name' field, type The name that will be presented to the customer when they receive the SMS interaction.



The friendly name may not be supported in some countries due to local regulations. In some cases, SMS providers may block it, displaying the number instead of the name.

- e. From the 'Time Zone' drop-down list, select the timezone associated with the SMS interaction. When interacting with this SMS , working hours, holidays and events are checked based on the timezone.
 - f. From the 'Working Hours Set' drop-down list, select a working hour set to define the working / non-working days and time for the SMS interaction.
 - g. In the 'Session Timeout (Minutes)' field, define the time that a customer must respond to an agent before the session is automatically closed.
 - h. Under the **Automatic Responses** group, define automatic messages for different scenarios:
 - ◆ 'Welcome Greeting' field: Greet the customer when starting a new conversation.
 - ◆ 'Timeout Alert': Notify the customer that the session is about to be closed because no response has been received.
 - ◆ 'Timeout Message': Notify the customer that the session has been closed because of inactivity.
 - ◆ 'Non-Working Hours Message': Notify the customer that the chat is currently unavailable because it's outside of working hours.
4. Select the **Routing** tab to choose where customers will be routed to when sending an SMS to this number. There are two options:
 - **Predefined** - Select this to choose where all messages that are sent to this SMS number will be routed to.
 - **Quick Reply** - Select this to create a tiered menu system. This allows customers to select their contact reason and any sub-reasons, and they will be routed to the appropriate queue.

5. If you selected **Predefined**, the following appears:

Add SMS Interaction Settings

General
Routing

Choose your Routing Method during Working Hours

Predefined

Route to:

Queue Name

Skills

Quick Reply

[Save Changes](#)

- a. Under **Route to**, from the 'Queue Name' field, select the queue.
- b. From the 'Skill's drop down list, select the specialized skills associated with this queue.

6. If you selected **Quick Reply**, the following appears:

Add SMS Interaction Settings

General
Routing

Choose your Routing Method during Working Hours

Predefined

Quick Reply

Acknowledgment Message

Thank you! An agent will receive your ...

Opening Question

Pick one of the following option

[+ Add new reason](#)

Key	Reason	Queue Name	Skills	
1				...
2				...

[Save Changes](#)

- a. In the 'Acknowledgment Message' field, click the edit icon, and enter a message that will be sent to the caller after they complete the selecting all the menu options, to

notify the customer that an agent will receive their message shortly and get back to them soon.

- b. From the 'Key' field, select the number the customer should press to select a specific option. The example shows '1' and '2' for the first two options.
- c. In the 'Reason' field, enter the text that corresponds to the key. This is what the customer will see as an option (for example, "Technical Support", "Sales Inquiry").
- d. From the 'Queue Name' drop down, select the queue where messages should be routed if the customer chooses this option.
- e. From the 'Skills' drop down, select any specific skills required by agents in the chosen queue to handle this type of inquiry.
- f. Add one or more sub-reasons that appear when the customer selects a specific option. For example, if they press 1, they will see another sub-menu with additional options to refine their contact reason:
 - i. Click the three dots on the side.

Quick Reply

The screenshot shows the 'Quick Reply' configuration interface. At the top, there is an 'Acknowledgment Message' field containing the text 'Thank you! An agent will receive your ...'. Below this is an 'Opening Question' field with the text 'Pick one of the following'. To the right of the opening question is a '+ Add new reason' button. Below the opening question, there are two rows of sub-reasons. Each row consists of four fields: 'Key', 'Reason', 'Queue Name', and 'Skills'. The first row has Key '1', Reason 'Technical Issue', Queue Name 'Support Queue', and Skills 'Technical Support'. The second row has Key '2', Reason 'Sales Inquiry', Queue Name 'Sales Queue', and Skills 'Sales Operations'. To the right of the Skills field in the first row, there is a three-dot menu icon. A tooltip is visible over this icon, containing a '+ Add new' button and a 'Delete' button with a trash icon.

ii. Click Add new.

The screenshot shows the 'Quick Reply' configuration interface with a sub-reason being added. The 'Opening Question' field contains 'Pick one of the following option'. Below it, there are three rows of sub-reasons. The first row has Key '1', Reason 'Technical Issue', and a three-dot menu icon to its right. The second row has Key '1', Reason 'Hardware Issue', Queue Name 'Support Queue', Skills 'Hardware Support', and a three-dot menu icon. The third row has Key '2', Reason 'Software Issue', Queue Name 'Support Queue', Skills 'Software Support', and a three-dot menu icon. Below these is a row with Key '3' and Reason 'Previous menu' with the text 'Back to the previous menu'. At the bottom, there is a row with Key '2', Reason 'Sales Inquiry', Queue Name 'Sales Queue', Skills 'Sales Operations', and a three-dot menu icon.

iii. Enter the following details for the sub-reason: Key, Reason, Queue Name, and Skills for the additional reason.

- iv. When complete, configure a key and instructions for returning to the previous menu.
- g. If you need to add more options, click the "+ Add new reason" button and repeat the steps for each additional option.

Editing SMS interactions

The procedure below describes how to edit SMS Interaction Settings.

➤ To edit SMS Interaction Settings:

1. Open the Chat Interaction Settings page (**Configuration > Interaction Manager > Chat**); the following appears:

Chat Interaction Settings

Search + Add New ▼ Actions ▼

<input type="checkbox"/>	INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
<input type="checkbox"/>	IT	Webchat	*	Tech Limited	Enabled
<input type="checkbox"/>	Voca Test	SMS	+447401400079	Tech Limited	Enabled

2. Select the SMS interaction check box that you want to edit.

Chat Interaction Settings

Search + Add New ▼ Actions ▼

<input type="checkbox"/>	INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
<input type="checkbox"/>	IT	Webchat	*	Tech Limited	Enabled
<input checked="" type="checkbox"/>	Voca Test	SMS	+447401400079	Tech Limited	Enabled

Edit Chat Settings

Delete Chat Settings

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

Edit SMS Interaction Settings

Enable/Disable

Interaction Name*

Voca Test

SMS Number*

+447401400079

Friendly Name*

Voca Test

Time Zone

(UTC +0:00) London



Working Hours Set

Tech Limited



Session Timeout (Minutes)

20

Automatic Responses

Welcome Message*

Thank you for reaching out! We will ...



Timeout Alert*

This message will time out soon



Timeout Message*

This chat has timed out⁶⁹ -



- Under the **General** tab, edit the fields you want to change.
- Select the **Routing** tab, and edit the field you want to change.

Edit SMS Interaction Settings

General Routing

Choose your Routing Method during Working Hours

Predefined
 Quick Reply

Acknowledgment Message 🗍
 Thank you! An agent will receive your ... ✎

Opening Question
 Pick one of the following option + Add new reason

Key 1	Reason Sales	Queue Name TechWorld Sales	Skills IT_GENERAL ✕	⋮
Key 2	Reason Support	Queue Name TechWorld Helpdesk	Skills IT_GENERAL ✕	⋮

Save Changes

- Click **Save Changes**.

Deleting SMS interactions

The procedure below describes how to delete SMS Interaction Settings.

➤ **To delete an SMS Interaction Setting:**

- Open Chat Interaction Settings page (**Configuration > Interaction Manager > Chat**); the following appears:

Chat Interaction Settings

+ Add New
Actions

<input type="checkbox"/>	INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
<input type="checkbox"/>	IT	Webchat	*	Tech Limited	Enabled
<input type="checkbox"/>	Voca Test	SMS	+447401400079	Tech Limited	Enabled

- Select the SMS interaction that you want to delete.

Chat Interaction Settings

Search + Add New Actions

INTERACTION NAME	INTERACTION TYPE	ENDPOINT	WORKING HOURS SET	STATUS
IT	Webchat	*	Tech Limited	Enabled
<input checked="" type="checkbox"/> Voca Test	SMS	+447401400079	Tech Limited	Enabled

Actions menu: Edit Chat Settings, Delete Chat Settings

3. From the 'Actions' drop-down menu, choose **Delete SMS Settings**.
4. Click **OK**.

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:

Prompts

Prompt Details + Add New

No data available

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

New Prompt

Prompt Details

File Name*

File Description*

File Upload/Record* Upload Record

No file chosen

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

➤ **To upload a file:**

1. Click the **Upload** option.
2. Click **Choose File** to locate the audio file to be uploaded.

New Prompt

The screenshot shows a 'New Prompt' form with a green header 'Prompt Details'. It contains three input fields: 'File Name*' with the value 'Business Hours', 'File Description*' with the value 'Recording to be played during business hours', and 'File Upload/Record*' with the 'Upload' radio button selected. Below the radio buttons is a 'Choose File' button and the text 'No file chosen'. At the bottom of the form are two buttons: 'Save Information' and 'Cancel'.

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



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

➤ **To record a file:**

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

New Prompt

The screenshot shows a 'New Prompt' form with a green header 'Prompt Details'. It contains three input fields: 'File Name*' with the value 'aa', 'File Description*' with the value 'aa', and 'File Upload/Record*' with the 'Record' radio button selected. Below the radio buttons are four buttons: 'Record' (red), 'Stop' (grey), 'Play' (green), and 'Download' (orange). At the bottom of the form are two buttons: 'Save Information' and 'Cancel'.

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

Configuring Menu Settings

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

- [DTMF Menu](#)
- [Speech Menu](#)

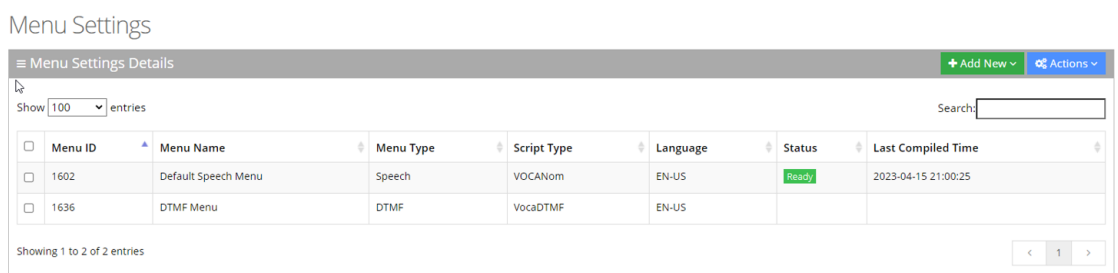
Adding a DTMF Menu

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

➤ **To add a DTMF menu:**

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

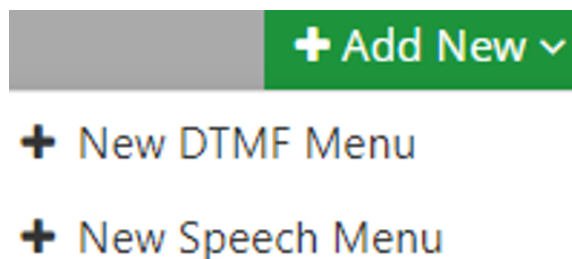
Menu Settings



Menu 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		

Showing 1 to 2 of 2 entries

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



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

New Menu Settings

General Settings

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

4. From the 'Menu Prompt' drop-down list, select the pre-configured prompt. See [Adding a Voice Prompt](#) on page 71 for more information.
5. From the 'Menu Dialect' drop-down list, select the language of the prompts. The system plays the prompts according to the menu dialect selected.
6. In the 'Max Wait Time' field, enter how much time to wait in seconds (0-30) until the user presses the DTMF.
7. In the 'Max Tries' field, enter how many times to repeat the prompts when there no response from the user.
8. In the 'Operator Extension Working Hours' field, enter the Operator's extension during working hours. This field appears only if the 'Allow transfer to operator' field is set to one of the following values:
 - Anonymous
 - Employee
 - All
 In these cases, the 'Operator extension Working Hours' field is mandatory.
9. In the 'Operator Extension Non-Working Hours' field, enter the Operator's extension during non-working hours. This field appears only if the 'Allow transfer to operator' field is set to one of the following values:
 - Anonymous
 - Employee
 - All
 In these cases, the 'Operator extension Working Hours' field is mandatory.

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

Adding a Speech Menu

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

➤ To add a Speech Menu:

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

Menu Settings

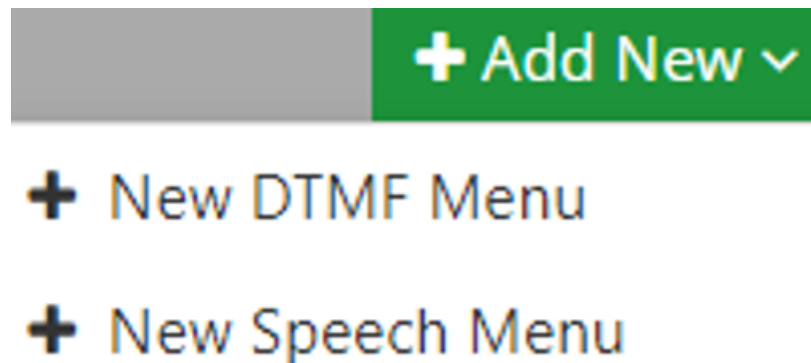
Menu Settings Details + Add New

Show entries Search

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

Showing 1 to 5 of 5 entries < 1 >

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



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

New Menu Settings

General Settings

Menu Name*

Dialect*

Dictionaries

First Dictionary*

Second Dictionary*

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

Prompts Settings

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

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

Play Phone Device Type When Transferring*

 A dropdown menu with a light blue background and a white border. The menu is open, showing three options: 'Always' (highlighted in light blue), 'Only for Multiple Devices', and 'Never'. The text 'Always' is also visible in the dropdown arrow on the right side of the menu.

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


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

Additional Settings

Play alias before transfer to department*	<input type="text" value="Short"/>
Confirm Before Transfer*	<input type="text" value="All"/>
Allow transfer to mobile phones*	<input type="text" value="All"/>
Allow transfer to operator*	<input type="text" value="Employees"/>
Operator extension	<input type="text"/>


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

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

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

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

Call Routing and Hunting - Contact

Routing Settings	Advanced routing ▾
Prompt Before Transfer	▾
No Answer Timeout (Sec.)*	120
When no Phone Type is Provided (Contacts only)*	Route by phone type priority and hunting ▾
Phone Type Priority	Office, Mobile 
Hunt on No Answer	<input checked="" type="checkbox"/>
Hunt on Busy (486)	<input type="checkbox"/>
Hunt on Other States (4xx, 5xx, 6xx)	<input type="checkbox"/>
Actions When Remote Party is not Reachable	
Action 1	▾
Action 2	▾
Action 3	▾

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

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

Call Routing and Hunting - Department

Routing Settings	Advanced routing
Prompt Before Transfer	
No Answer Timeout (Sec.)*	10
Hunting type*	Main extension first
Hunt on No Answer	<input type="checkbox"/>
Hunt on Busy (486)	<input type="checkbox"/>
Hunt on Other States (4xx, 5xx, 6xx)	<input type="checkbox"/>
Actions When Remote Party is not Reachable	
Action 1	
Action 2	
Action 3	

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

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

DTMF

Collect and route type	Transfer to extension ▼
	The minimum length of extension number <input style="width: 50px;" type="text" value="1"/> AND
	The maximum length of extension number <input style="width: 50px;" type="text" value="1"/>
DTMF keys Type	None ▼

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

Editing Menu Settings

The procedure below describes how to edit menu settings.

➤ To edit menu settings:

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

Figure 6-1:

Menu Settings

Menu Settings Details + Add New ▼ Actions ▼

Show 100 entries Search:

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

Showing 1 to 4 of 4 entries < 1 >

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

Figure 6-2:

Menu Settings

Menu Settings Details + Add New ▼ Actions ▼

Show 100 entries Search:

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

Showing 1 to 4 of 4 entries < 1 >

▼

- Edit Menu
- Delete Menu
- Recompile

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

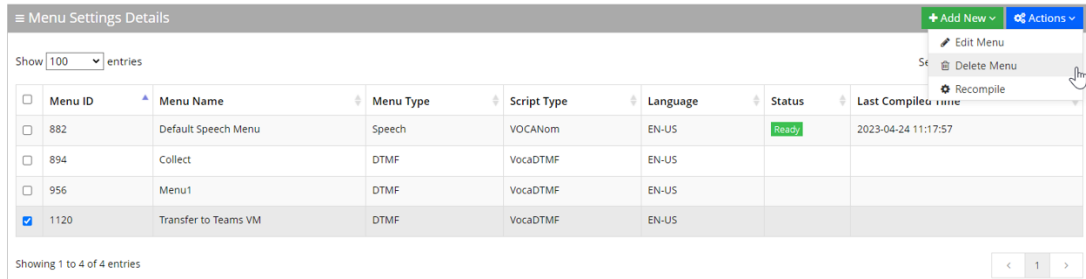
Deleting Menu Settings

The procedure below describes how to delete menu settings.

➤ To delete menu settings:

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

Menu Settings



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

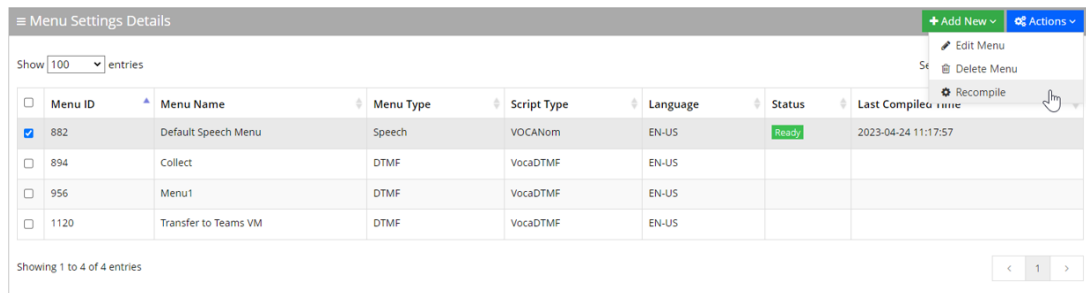
Recompile Menus

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

➤ **To recompile menus:**

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

Menu Settings



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
- Recording Profiles
- Worker status events
- Conversation Template
- Worker group
- Callback
- 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

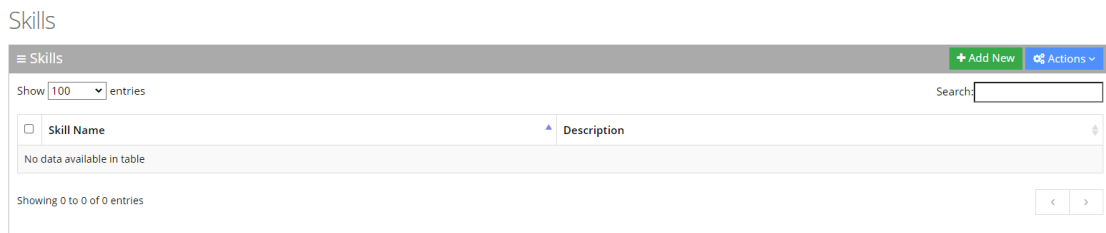
Skills are customer-definable labels assigned to workers. The Voca Interaction Center can route incoming calls to workers who have the necessary skills or sets of skills to handle the call.

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:

The screenshot shows the 'New Skill' form. It has a light blue header with the text 'New Skill'. Below the header, there are two input fields: 'Name*' and 'Description'. Below the input fields, there is a blue button labeled 'Save Changes'.

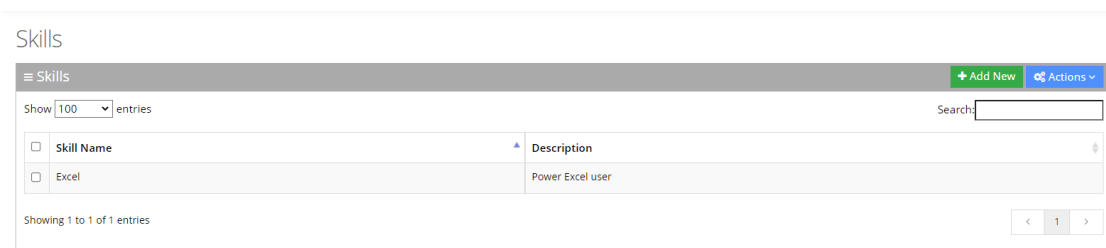
3. In the 'Name' field, enter the name of the skill (e.g., "Excel").
4. In the 'Description' field, enter a description of the skill (e.g., "Power user of Excel").
5. Click **Save Changes**.

Editing a Skill

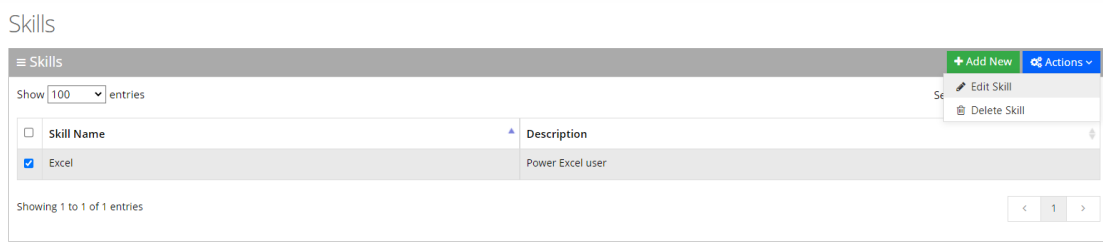
The procedure below describes how to edit a Skill.

➤ **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.



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

The screenshot shows the 'Edit Skill' form. It has a light blue header with the title 'Edit Skill'. Below the header, there are two input fields. The first is labeled 'Name*' and contains the text 'Excel'. The second is labeled 'Description' and contains the text 'Power Excel user'. Below the input fields, there is a blue button labeled 'Save Changes'.

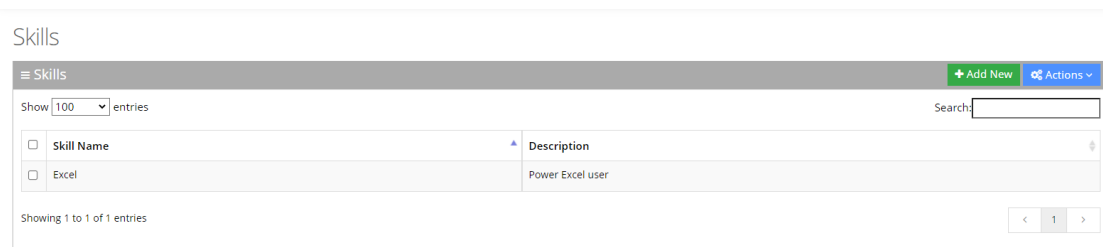
- Make your necessary changes, and then click **Save Changes**.

Deleting a Skill

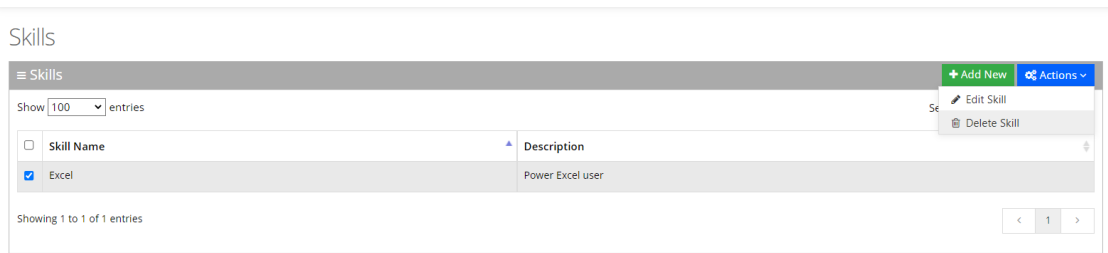
The procedure below describes how to delete a Skill.

➤ To delete a Skill:

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



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



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

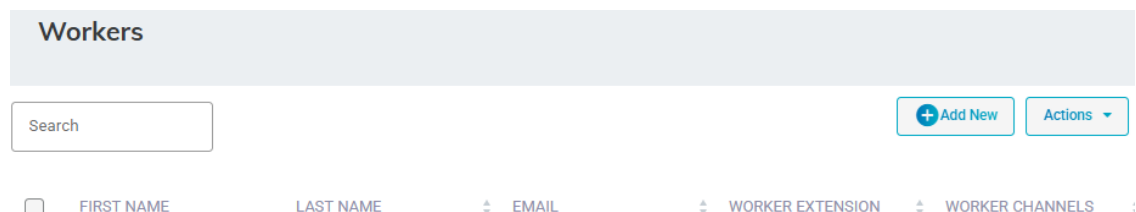
The procedure below describes how to add a Worker or Supervisor.



Before adding a worker, ensure you configured skills. For details, see [Adding a Skill](#) on page 85.

➤ To add a Worker:

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



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

New Worker

Worker ▼
 Voice Email Chat Enable Queue Missed Calls View

Assigned Skills

▼
10

Save Changes

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 to enable the Supervisor to log in to the **Voca Web Management** interface.



This check box is only displayed if you selected **Supervisor** for 'Worker Type'.

10. For Digital Engagement Tenants only:

Worker License Type
CIC3 (Omnichannel) ▼

Max. Interactions


Email 5 Chat 5

'Worker License type' settings appear only if the tenant has both CIC2 and CIC3 workers. Select the check boxes of the channels that the Worker is allowed to handle; **CIC2 (Voice)** is selected by default. If you select **CIC3 (Omnichannel)**, then configure the 'Max interactions' the worker can handle simultaneously for 'email' and 'chat'.

11. 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.
12. 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.



The skill score ranges from 1 to 10, where 1 indicates the lowest priority and 10 indicates the highest priority.

13. Click  to assign another skill to this Worker.
14. Click **Save Changes**.



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

- Flex queues that the Supervisor is assigned to as a Supervisor (see [Configuring Flex Queues](#) on page 118)
- Worker queues their supervised Workers (in relevant Worker Groups) relate to
- All Tenant Workers
- Worker Groups they supervise
- Relevant Reports

Editing a Worker

The procedure below describes how to edit a Worker.

➤ To edit a Worker:

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

Workers

Search + Add New Actions

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	WORKER EXTENSION	WORKER CHANNELS
<input type="checkbox"/>	Danielle	Smith	danielle.smith@email.com	1140	Voice, Email, Chat
<input type="checkbox"/>	Mike	Jackson	mike.jackson@email.com	1180	Voice, Email, Chat
<input type="checkbox"/>	Brad	Brown	brad.brown@email.com	1150	Voice, Email, Chat
<input type="checkbox"/>	Ruth	Wilson	ruth.wilson@email.com	1160	Voice, Email, Chat
<input type="checkbox"/>	Daniel	Black	daniel.black@email.com	1170	Voice, Email, Chat

Items per page: 25 1 - 5 of 5 Page number: 1

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

Workers

Search + Add New Actions

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	WORKER EXTENSION	WO
<input checked="" type="checkbox"/>	Danielle	Smith	danielle.smith@email.com	1140	Voice, Email, Chat

Edit Worker

Delete Worker(S)

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

Edit Worker

First Name*

Last Name*

Email*

Worker Extension*

Location

Worker Type

Worker License Type

Max. Interactions

Email Chat

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

Deleting a Worker

The procedure below describes how to delete a Worker.

➤ **To delete a Worker:**

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

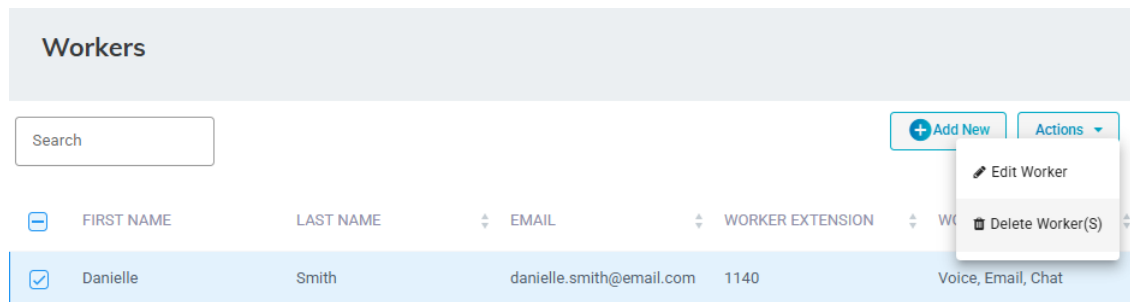
Workers

Search + Add New Actions

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	WORKER EXTENSION	WORKER CHANNELS
<input type="checkbox"/>	Danielle	Smith	danielle.smith@email.com	1140	Voice, Email, Chat
<input type="checkbox"/>	Mike	Jackson	mike.jackson@email.com	1180	Voice, Email, Chat
<input type="checkbox"/>	Brad	Brown	brad.brown@email.com	1150	Voice, Email, Chat
<input type="checkbox"/>	Ruth	Wilson	ruth.wilson@email.com	1160	Voice, Email, Chat
<input type="checkbox"/>	Daniel	Black	daniel.black@email.com	1170	Voice, Email, Chat


Items per page: 25 1 - 5 of 5 Page number: 1

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



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 Recording Profiles

A Recording Profile defines how calls are recorded and analyzed for specific agent groups and call scenarios. As an admin, you can create multiple profiles with different recording and AI policies for each call type (for example, inbound vs. outbound, specific queues) to ensure consistent and compliant behavior across the team.

Adding a Recording Profile

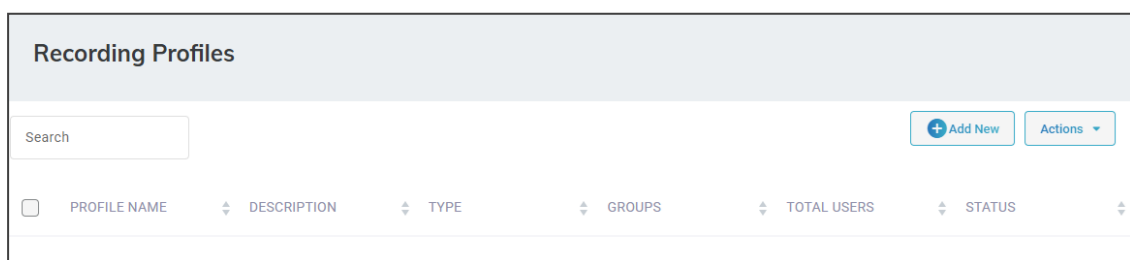
The procedure below describes how to add a Recording Profile. The Admin can configure which call types are recorded based on call direction. Calls are categorized as queued (routed to the agent through a call queue, also known as a Worker Queue) or non-queued (direct calls to the agent via the Worker App).



Calls received through Microsoft Teams are not recorded.

➤ **To add a Recording Profile:**

1. Open the Recording Profiles page (**Configuration > Routing > Recording Profiles**).



2. Click **Add New**.

New Recording Profile

Profile Name*

Description

1 Configuration

2 Group Mapping

3 M365 Policy

Call Types To Record

Queue Calls

Inbound/Outbound

Start Recording

Automatically

Allow Pause/Resume

Consult

Non-Queue Calls

Inbound

Start Recording

Automatically

Allow Pause/Resume

Outbound

Start Recording

Automatically

Allow Pause/Resume

Storage

Bring Your Own Storage

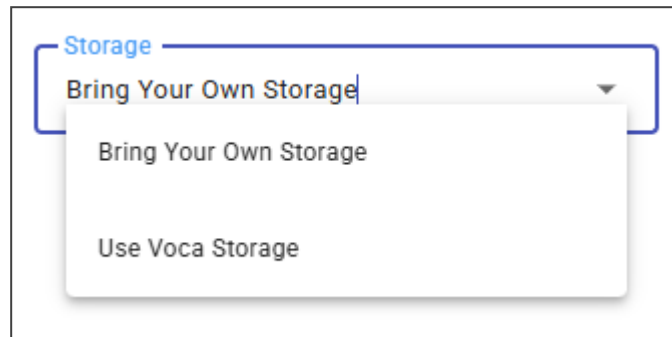
Friendly Name

None

Next

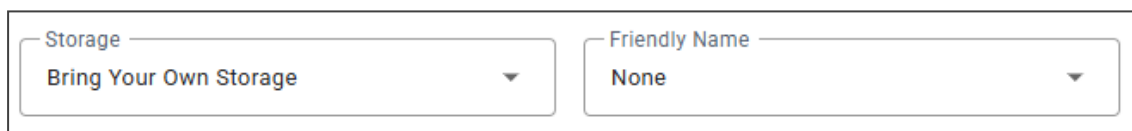
3. In the 'Name' field, enter the name of the recording profile.
4. Under 'Call Types to Record', under 'Queue Calls',
 - a. Select **Inbound/Outbound** to apply recording on queue calls answered via Worker Application.
 - b. Choose whether recording will start **Manually** or **Automatically**.
 - c. Select **Allow Pause/Resume** to let agents pause or resume recording for compliance purposes. When **Manual Recording** is selected, this option is automatically enabled and cannot be changed.
 - d. (Optional) Select **Consult** if you want to record consultation calls (when an agent consults another agent or supervisor).
5. Under 'Call Types to Record', under 'Non-Queue Calls', configure recording settings separately for inbound and outbound non-queued calls.
 - a. Select **Inbound** to apply recording on inbound non-queue calls answered via the Worker Application.
 - b. Choose whether recording will start **Manually** or **Automatically**.
 - c. Select **Allow Pause/Resume** to let agents pause or resume recording for compliance purposes. When **Manual Recording** is selected, this option is automatically enabled and cannot be changed.

- d. Select **Outbound** to apply recording on outbound non-queue calls answered via the Worker Application.
 - e. Repeat above steps.
6. Configure storage type. Choose between Voca storage or your own storage. The list is populated from System Settings. If no external storage is defined, only Voca storage will be available.



The screenshot shows a dropdown menu for the 'Storage' field. The selected option is 'Bring Your Own Storage'. The dropdown list contains two items: 'Bring Your Own Storage' and 'Use Voca Storage'.

7. Select **Bring Your Own Storage** or **Use Voca Storage**.
8. If you selected Bring Your Own Storage, give your storage a name.



The screenshot shows two dropdown menus side-by-side. The first is labeled 'Storage' and has 'Bring Your Own Storage' selected. The second is labeled 'Friendly Name' and has 'None' selected.

9. Select **Allow Agent Insights**.



This option (and related settings) is visible only if the tenant has the Agent Insight add-on.

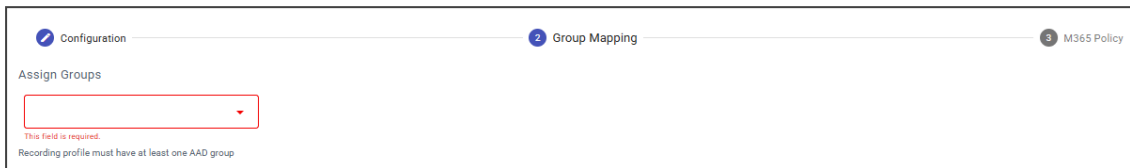


The screenshot shows the 'Allow Agent Insights' checkbox checked. Below it are two dropdown menus: 'Primary Language*' and 'Secondary language', both currently empty.

10. From 'Primary Language', select the main language for AI processing. This language will be used to create transcripts, summaries, and sentiment analysis. You need to set it manually (auto-detection is not supported). Agents can change the primary language during a call if needed.

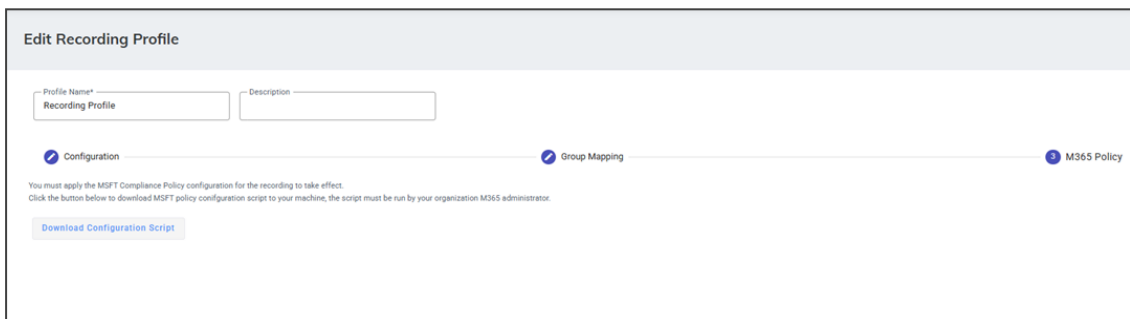
11. (Optional) From 'Secondary Language', select additional languages the agent can switch to during a call. Agents can choose from 14 supported languages (e.g., Spanish, Mexican Spanish, French).

12. Click **Next**.




13. In the Group Mapping section, under 'Assign Groups', select at least one AAD group. The security groups is automatically populated after synchronization is completed in the Call Recording tab in the System Settings that was configured earlier.

14. Click **Next**.



15. In the M365 Policy section, click **Download Configuration Steps**. Admins need to download and run the PowerShell script in the Azure environment to enable these settings. Once completed, the Recording Profile status will change to 'Success'. This is a mandatory step.



When using Microsoft Calling Plan or Operator Connect as the PSTN carrier, recording announcements are enforced by Microsoft's cloud infrastructure and cannot be modified, delayed, or suppressed.

Editing a Recording Profile

The procedure below describes how to edit a Recording Profile.

➤ **To edit a Recording Profile:**

1. Open the Recording Profiles page (**Configuration > Routing > Recording Profiles**).
2. Select the Recording Profiles you wish to edit by selecting the corresponding check box.

Recording Profiles

Search + Add New Actions

PROFILE NAME	DESCRIPTION	TYPE	GROUPS	TOTAL
<input checked="" type="checkbox"/> FSBackendRecordingPr...	FSBackendRecordingPr...	AI	BackEndCore	0
<input type="checkbox"/> RoiRecProfile1		AI	Agents	3
<input type="checkbox"/> RecProfileForCIC-6-7-8	RecProfileForCIC-6-7-8	AI	SecurityCICTest6-7-8	0
<input type="checkbox"/> FSRecordingProfile		AI	CIC6Group, CIC7Group, ...	3

Actions menu:

- Download Recording Profile Policy File
- Disable Recording Profile
- Delete Recording Profile
- Sync Recording Profile With AAD
- Edit Recording Profile**

Successful

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

Edit Recording Profile

Profile Name* FSBackendRecordingProfile Description FSBackendRecordingProfile

1 Configuration 2 Group Mapping 3 M365 Policy

Inbound Start Recording Automatically Allow Pause/Resume

Outbound Start Recording Automatically Allow Pause/Resume

Storage Use Voca Storage

Allow Agent Insights

Primary Language* EN-GB

Secondary language EN-US

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

Disabling and deleting a Recording Profile

The procedure below explains how to delete a Recording Profiles. To delete a Recording Profile, you need to first disable it.

➤ To delete a Recording Profiles:

1. Open the Recording Profiles page (**Configuration > Routing > Recording Profiles**).

The screenshot shows the 'Recording Profiles' management interface. It features a search bar at the top left and an 'Add New' button at the top right. Below these is a table with the following columns: PROFILE NAME, DESCRIPTION, TYPE, GROUPS, and TOTAL. The first row, 'FSBackendRecordingPr...', is selected. An 'Actions' dropdown menu is open over the selected row, with 'Disable Recording Profile' and 'Delete Recording Profile' highlighted in red. A green 'Successful' message is visible at the bottom right of the interface.

PROFILE NAME	DESCRIPTION	TYPE	GROUPS	TOTAL
<input checked="" type="checkbox"/> FSBackendRecordingPr...	FSBackendRecordingPr...	AI	BackEndCore	0
<input type="checkbox"/> RoiRecProfile1		AI	Agents	3
<input type="checkbox"/> RecProfileForCIC-6-7-8	RecProfileForCIC-6-7-8	AI	SecurityCICTest6-7-8	0
<input type="checkbox"/> FSRecordingProfile		AI	CIC6Group, CIC7Group, ...	3

2. Select the Recording Profile you wish to delete by selecting the corresponding check box.
3. From the 'Actions' drop-down menu, choose **Disable Recording Profile** and then **Delete Recording Profile**. A confirmation message box appears.
4. Click **OK** to confirm deletion.

Additional Actions

Additionally, you can perform the following actions on a Recording Profile:

- **Download Recording Profile Policy File** - Save and download the script later
- **Disable th Recording Profile** - Disable the Recording Profile before deleting
- **Sync Recording Profile with AAD**

➤ To do additional actions:

This screenshot is similar to the first one, but the 'Actions' dropdown menu is open, and 'Edit Recording Profile' is highlighted in red. The 'Successful' message is still present at the bottom right.

Select the Recording Profile, then from the Actions drop-down menu, then select the desired action.

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

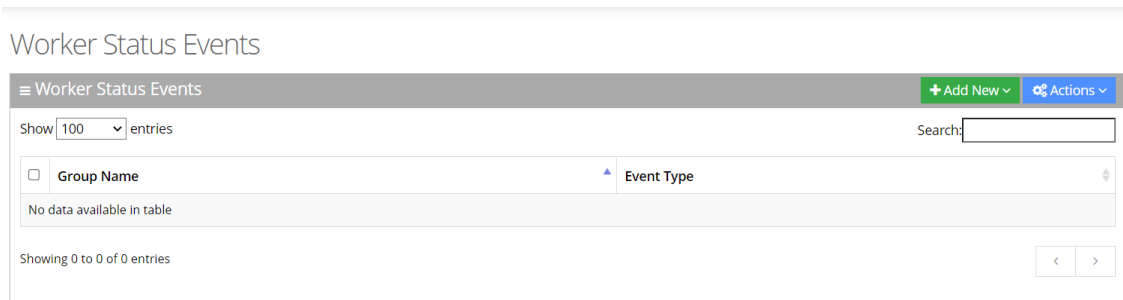
Adding Worker Status Events

The procedure below describes how to add a Worker Status Event. You can add either a wrap-up event or a Not ready group event.

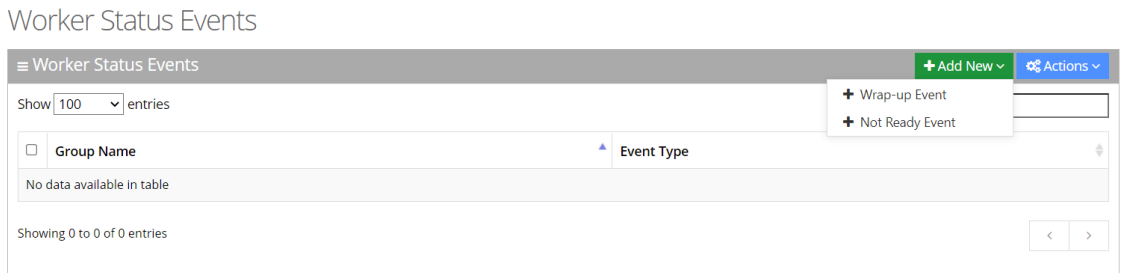
Add a Wrap-Up Event

➤ **To add a Wrap-up event:**

1. Open the Worker Status Events page (**Configuration > Routing > Worker Status Event**).



2. Click **Add new**.



3. Select the **Wrap-up Event**.

4. In the **Wrap-up Event**, enter the 'Group Name' and 'Event Name' in the appropriate fields.

New Worker Status Event

Wrap-up Group Name*

Wrap-up Events

Event Name* Time (Sec.) AI

5. For tenants with the Hybrid Worker feature enabled (System Settings > Hybrid Worker), select the 'Hybrid Wrap-up' checkbox to set a designated Wrap-up event for Hybrid Workers.
6. For tenants with Call Recordings (System Settings > Call Recordings) and the Agent Insights add-on, select **AI** to allow Workers with Agent Insights capabilities to view the call's transcript, summary, and sentiment, and to enable sending this data to the CRM.

Wrap-up Events

Event Name*

Time (Sec.)
60

+
 AI

Transcript	<input type="checkbox"/> Send to CRM	<input type="checkbox"/> Worker View
Summary	<input type="checkbox"/> Send to CRM	<input type="checkbox"/> Worker View
Sentiment	<input type="checkbox"/> Send to CRM	<input type="checkbox"/> Worker View
Additional Notes	<input type="checkbox"/> Send to CRM	<input type="checkbox"/> Worker View
Recording Link	<input type="checkbox"/> Send to CRM	

7. Configuration includes five components:
 - 'Transcript' – Contains the complete conversation between the caller and the agent, including speaker diarization that identifies who spoke and when.
 - 'Summary' – Contains key conversation highlights and a short summary with follow-up actions, generated based on the prompt assigned by the admin for this event.
 - 'Sentiment' – Displays the caller's sentiment throughout the conversation, based on the analyzed interaction.
 - 'Additional notes' – Allows Worker to add notes at the end of the call.
 - 'Recording Link' – Sends to CRM ticket a URL with call details and recording.

For each component, you can decide which information is sent to if the agent can view it.

 - a. Select **Send to CRM** - at the end of the call the information is sent to the CRM as a .json file.
 - b. Select **Worker View** to allow the Worker to view the information.

Transcript Send to CRM Worker View

Summary Send to CRM Worker View

Sentiment Send to CRM Worker View

CRM URL*

8. Enter the 'CRM URL'.
9. If you selected 'Summary', under 'Summary Prompting', select one of the top 10 predefined prompts. Voca uses the selected prompt to generate the conversation summary.

Wrap-up Events

Summary Send to CRM Worker View

Sentiment Send to CRM Worker View

Summary Prompting

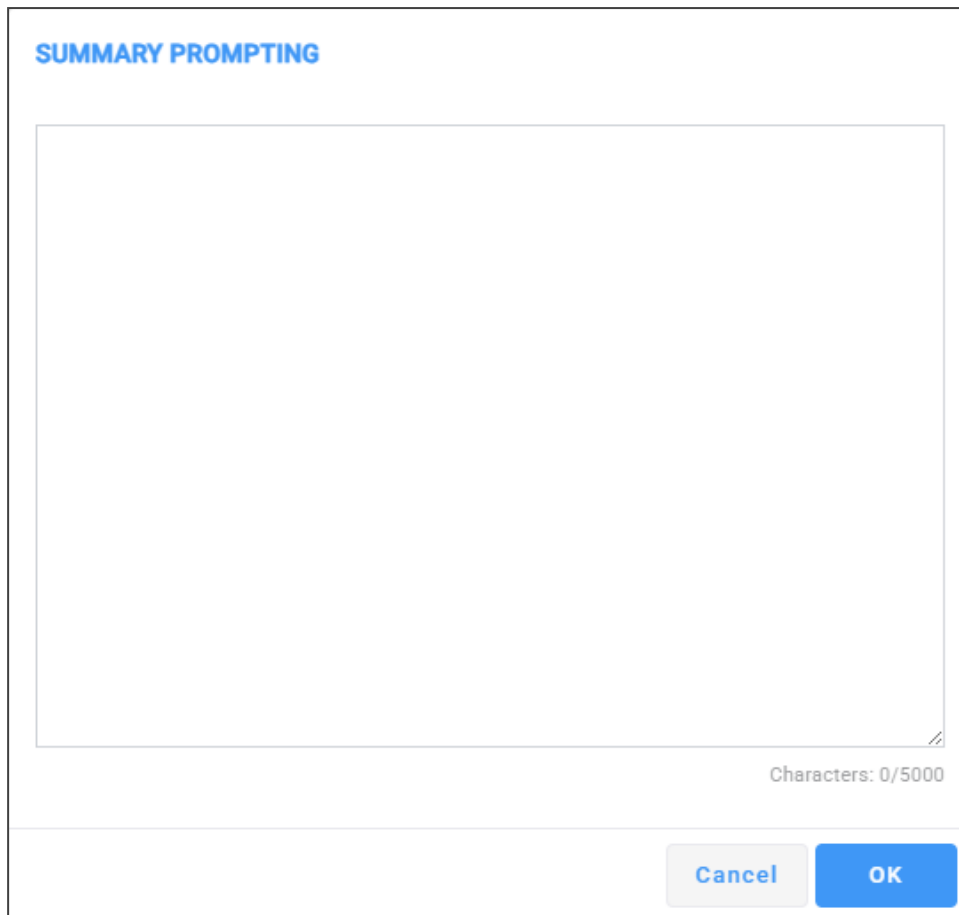
- Healthcare
- Financial Services / Banking
- Retail / eCommerce
- Telecommunications
- Insurance

10. You can write your own prompt to generate a summary. Under 'Summary Prompting', select **Custom**.

Summary Prompting

Data* 

11. Under 'Data', click the edit icon.



12. Enter your custom prompt, and click **OK**.

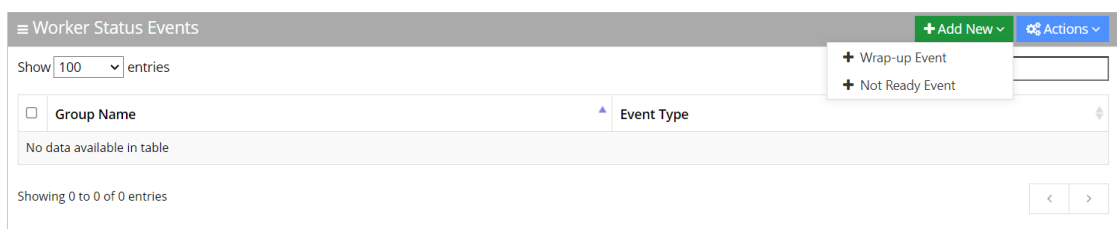
13. Click **Save Changes**.

Add a Not Ready Group Event

➤ To add a **Not Ready Group** event:

1. Open the Worker Status Events page (**Configuration > Routing > Worker Status Event**).
2. Click **Add new**.

Worker Status Events




3. Select the **Not Ready Event**.

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


New Worker Status Event

Not Ready Group Name*

Not Ready Events

Event Name* 

[Save Changes](#)

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

Editing Worker Status Events

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

➤ **To edit a Worker Status Event:**

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

Worker Status Events

Worker Status Events + Add New ⚙️ Actions

Show entries Search:

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

Showing 1 to 2 of 2 entries < 1 >

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

Worker Status Events

Worker Status Events + Add New ⚙️ Actions

Show entries Search:

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

Showing 1 to 2 of 2 entries < 1 >

Edit Worker Status Event
Delete Worker Status Event(s)

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

Edit Worker Status Event

Not Ready Group Name*
Not Ready General

Not Ready Events

Event Name*
Lunch +

Event Name*
Coffee -

[Save Changes](#)

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

Deleting Worker Status Events

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

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

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

Worker Status Events

Group Name	Event Type
Extra	Not Ready
Final Steps	Wrap Up

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

Worker Status Events

Group Name	Event Type
Extra	Not Ready
Final Steps	Wrap Up

A confirmation message box appears.

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

Configuring Conversation Templates



Available for Digital Engagement Tenants only.

You can create conversation templates that Workers can use during email or chat interactions. Templates are quick, editable replies with common and suggested messages. Any Email or Chat queue can be assigned one Template group.

Adding a Conversation Templates

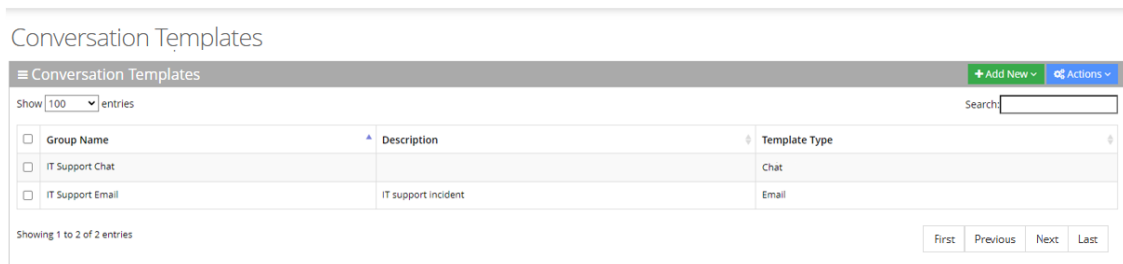
This section describes how to add a Conversation Template for email and chat interactions.

Adding an Email Conversation Template

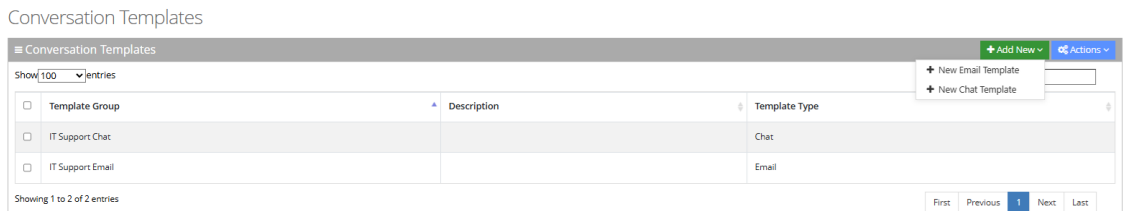
The procedure below describes how to add an Email Conversation Template.

➤ To add an Email Conversation Template:

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



2. Click **Add New**; a drop-down menu appears:



3. From the drop-down menu, choose **New Email Template**; the following appears:

Add Email Template

Email Template Group Name*

Description

Email Template

Template Name*

Data*



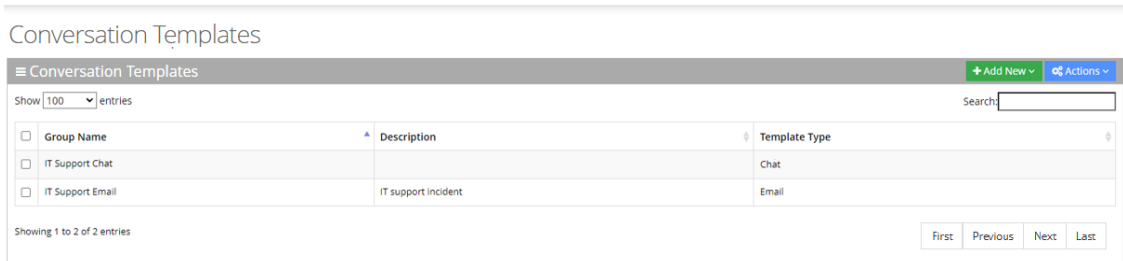
4. In the 'Email Template Group Name' field, type a name for the template group.
5. In the 'Description' field, type a description for the template group.
6. In the 'Template Name' field, type a name for the template.
7. Click the 'Data' field to add the template's content.
8. To add additional templates to the group, click .
9. Click **Save Changes**.

Adding a Chat Conversation Template

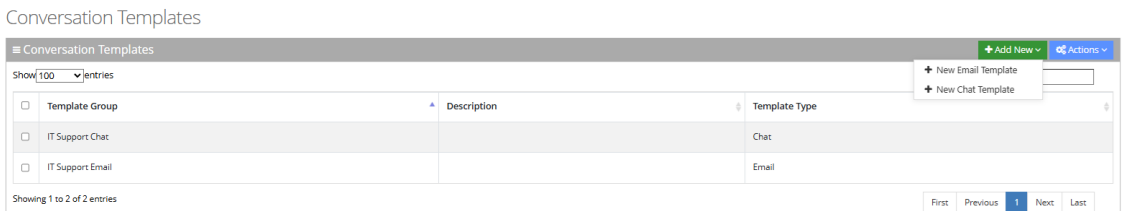
The procedure below describes how to add a Chat Conversation template.

➤ To add a Chat Conversation Template:

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



2. Click **Add New**; a drop-down menu appears:



3. From the drop-down menu, choose **New Chat Template**; the following appears:

Add Chat Template

Chat Template Group Name*

Description

Chat Template

Template Name* Data*

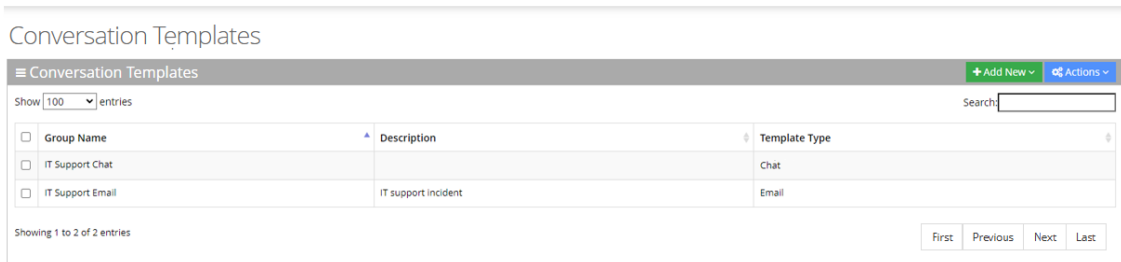
4. In the 'Chat Template Group Name' field, type a name for the template group.
5. In the 'Description' field, type a description for the template group.
6. Under Chat Template, in the 'Template Name' field, type a name for the template.
7. Click the 'Data' field to add the template's content.
8. To add additional templates to the group, click .
9. Click **Save Changes**.

Editing Conversation Template

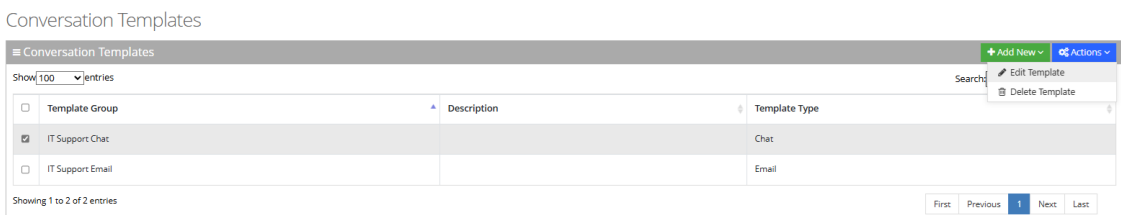
The procedure below describes how to edit a Conversation Template.

➤ ➤ **To edit a Conversation Template:**

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



2. Select the check box corresponding to the template that you wish to edit.



3. From the 'Actions' drop-down menu, choose **Edit Template**; the following appears (e.g., for editing chat template):

Edit Chat Template

Chat Template Group Name*
IT Support Chat

Description

Chat Template

Template Name* Welcome	Data* Hello, can you give m... <div style="text-align: right;">✎ +</div>
Template Name* Step-by-step guide	Data* Here is a link to... <div style="text-align: right;">✎ -</div>
Template Name* Send me a picture	Data* Are you able to send ... <div style="text-align: right;">✎ -</div>

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

Deleting a Conversation Template

The procedure below describes how to delete a Conversation Template.

➤ ➤ **To delete a Conversation Template:**

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

Conversation Templates

Conversation Templates			+ Add New	⚙ Actions
Show 100 entries			Search:	
<input type="checkbox"/>	Group Name	Description	Template Type	
<input type="checkbox"/>	IT Support Chat		Chat	
<input type="checkbox"/>	IT Support Email	IT support incident	Email	
Showing 1 to 2 of 2 entries				First Previous Next Last

2. Select the check box corresponding to the template that you wish to delete.

Conversation Templates

Conversation Templates			+ Add New	⚙ Actions
Show 100 entries			Search:	<input type="checkbox"/> Edit Template <input checked="" type="checkbox"/> Delete Template
<input type="checkbox"/>	Template Group	Description	Template Type	
<input checked="" type="checkbox"/>	IT Support Chat		Chat	
<input type="checkbox"/>	IT Support Email		Email	
Showing 1 to 2 of 2 entries				First Previous 1 Next Last

3. From the 'Actions' drop-down menu, choose **Conversation Template(s)**; a confirmation message box appears.
4. Click **OK** to confirm.

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 Workers 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:

Workers Group

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

<input type="checkbox"/>	GROUP NAME	DESCRIPTION
No data		

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

New Workers Group

Group Name*

Description

Not Ready Status Group
 None ▼

Supervisors

Supervisor* +

Live Monitoring Auto Switch Worker to Not Ready

Supervised Workers

Worker* +

Auto Switch Worker to Not Ready

[Save Changes](#)


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

7. Select **Live Monitoring** to allow the supervisor the following capabilities: listen, whisper, and barge-in.
8. Select **Auto Switch Worker to Not Ready** to automatically change the worker's status from **Ready** to **Not Ready** after they miss a call in the Worker Application.
9. From the 'Supervised Worker' drop-down list, select the appropriate Worker name.

For Tenants with the Hybrid Worker feature enabled (System Settings > Hybrid Worker), for each Worker, select their answering device, Worker Application, or Microsoft Teams.



If the worker is currently logged in, the change will take effect after they log out and log back in.

10. Click  to add additional Supervisors or Workers.
11. Click **Save Changes**.

Editing a Workers Group

The procedure below describes how to edit a Workers Group.

➤ To edit a Workers Group:

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

Workers Group

Search + Add New Actions ▾

<input type="checkbox"/>	GROUP NAME	DESCRIPTION
<input type="checkbox"/>	TW Team	Writes and manages documentation

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

Workers Group

Search + Add New Actions ▾

<input checked="" type="checkbox"/>	GROUP NAME	DESCRIPTION
<input checked="" type="checkbox"/>	TW Team	Writes and manages documentation

Edit Workers Group
 Delete Workers Group(S)

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

Edit Workers Group

Group Name*
TW Team

Description
Writes and manages documentation

Not Ready Status Group
None

Supervisors

Supervisor*
Mike Jackson

Live Monitoring Auto Switch Worker to Not Ready

Supervised Workers

Worker*
Danielle Smith

Auto Switch Worker to Not Ready

Save Changes

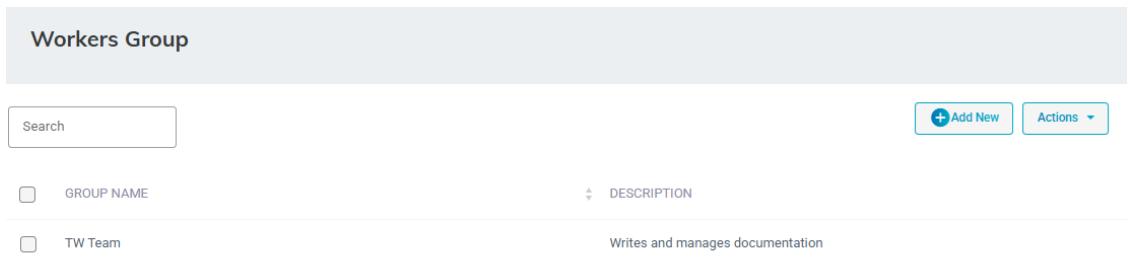
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Workers Group

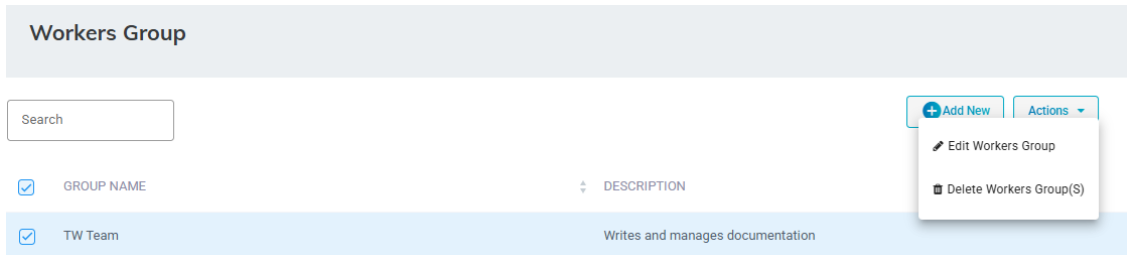
The procedure below describes how to delete a Workers Group.

➤ 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 Callback

The administrator can create callback offers that callers can use while waiting in the queue.



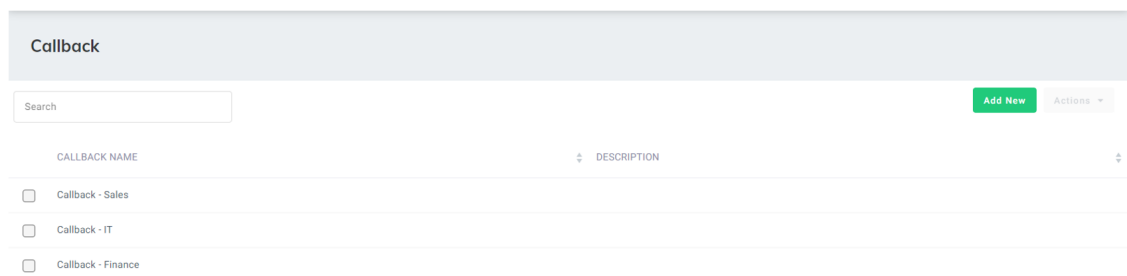
- Callback instances implementation is within the 'In Queue Settings' in the Skill Based Queue configuration.
- You can use one Callback instance for multiple Skill Based Queues, or create several.

Adding a Callback

The procedure below describes how to add a Callback.

➤ To add a Callback:

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



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

Add Callback

Callback Name*

Description

Max Tries ⓘ

Retry Timeout (Min.) ⓘ

Ringing Timeout (Sec.) ⓘ

Greeting* ▼

Save Changes

3. In the 'Callback Name' field, enter the name of the Callback.
4. In the 'Description' field, enter a description of the Callback.
5. In the 'Max Retries' field, enter the maximum number of callbacks that will be attempted to reach a caller.
6. In the 'Retry Timeout (Min.)' field, enter the number of minutes that Voca waits after a failed callback attempt before injecting the call into the queue again.
7. In the 'Ringing Timeout (Sec.)' field, enter the time that Voca waits for the remote side to answer the call.
8. From the 'Greeting' drop-down list, select the prompt that will be heard by the callers when they receive the callback once their turn arrives.
9. Click **Save Changes**.

Editing a Callback

The procedure below describes how to edit a Callback.

➤ To edit a Callback:

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

2. Select the Callback you want to edit, by selecting the corresponding check box.
3. From the 'Actions' drop-down list, choose **Edit Callback**; the following appears:

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

Deleting a Callback

The procedure below describes how to delete a Callback.

➤ To delete a Callback:

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

2. Select the Callback you want to delete, by selecting the corresponding check box.

3. From the 'Actions' drop-down list, choose **Delete Callback**; a confirmation message box appears.
4. Click **OK** to confirm deletion.

Configuring Queues

This section deals with how to configure the following Queues:

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

Configuring Flex Queues

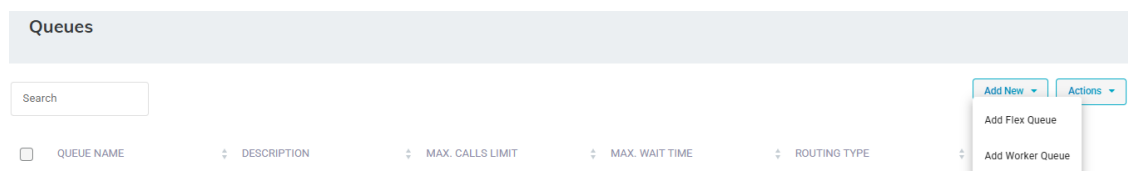
Flex Queues provide the ability to place an incoming call in a queue before transferring it to one of its destination lists. When the call is in a queue, the caller hears music on hold. The system supports defining several call queues per customer or service.

Adding a Flex Queue

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

➤ To add a new Call Queue:

1. Open the Queues page (**Configuration > Routing > Queues**).



2. From the **Add New** drop-down menu, select **Add Flex Queue**.
3. In the 'Name' field, enter the name of the queue.
4. In the 'Description' field, enter a short description for the queue.
5. From the 'Queue Greeting' drop-down list, select the greeting that will be play when the call enters the queue.
6. From the 'Music on Hold' drop-down list, select the music on hold that will be play when the caller waiting in the queue.
7. 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

8. 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.
9. From the 'Supervisors' drop-down list, select a Supervisor (see [Step 9](#) in Adding a Worker).
10. 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.
11. 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.
12. In the 'Overflow Call When All Queue Members Are ' check box, enable or disable the admin can choose on which Teams presence status will be considered as logged out. When all the queue members meet the selected presence status the caller will automatically transfer to the relevant action that configured in the 'When overflow condition is set'.

Overflow Call When All Queue Members Are

Offline

Away

Do Not Disturb

When overflow condition is set

Action 1

|

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

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

Maximum Calls in Queue

When the maximum number of calls is reached

Action 1

|

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



This limit requires the same or higher licensed channels.

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

be transferred to the relevant action configured in the 'When the maximum wait time is reached' field.

Maximum Wait Time (Min.)

When the maximum wait time is reached

Action 1 Data

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



15. To provide callers with various actions and options during their waiting time, select the 'In-queue Settings' check box; the following appears:

In-queue Settings


Start Cycle (Min.)

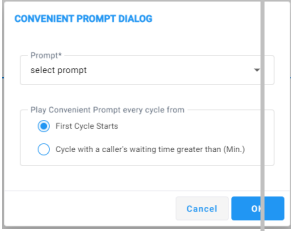

Delay Between Cycles (Min.)

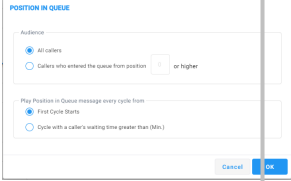
Menu Settings


Convenient Prompt  

- a. In the 'Start Cycle' field, enter the duration (in minutes) that the basic 'music on hold' is played to the caller, before playing the set of in-queue actions to the caller.
- b. In the 'Delay Between Cycles' field, enter the duration (in minutes) that the basic 'music on hold' is played to the caller after the current set of in-queue actions and before the next set of in-queue actions begins.
- c. Under **Menu Settings**, select the actions and options that are played / offered when in-queue. Their order from top to bottom is the order in which they are played during the cycle. You can change the order by dragging and dropping each item.

From drop-down list, select	Description	Edit fields
Convenient Prompt	This prompt plays a selected prompt	1. Click the 'Data' field's  icon; the following appears:

From drop-down list, select	Description	Edit fields
		 <ol style="list-style-type: none"> From the 'Prompt' drop-down list, select a prompt from the Tenant's prompts list. Under the Play Convenient Prompt every cycle from group, select one of the following options: <ul style="list-style-type: none"> ✓ First Cycle Starts - plays prompt according to duration configured in the 'Start Cycle' field (above). ✓ Cycle with a caller's waiting time greater than - prompt starts playing in the cycle that is equal to or greater than the time configured in this field.
<p>Position in Queue</p>	<p>This prompt informs callers about their position in the queue.</p>	<ol style="list-style-type: none"> Click the 'Data' field's  icon; the following appears:

From drop-down list, select	Description	Edit fields
		 <p>2. Under the Audi- ence group, choose which callers will hear this prompt:</p> <ul style="list-style-type: none"> ✓ All Callers ✓ Callers who entered the queue from position - plays the prompt only to callers who entered the queue from the position that you configure in the field or higher <p>3. Under the Play Pos- ition in Queue mes- sage every cycle from group, select one of the following options:</p> <ul style="list-style-type: none"> ✓ First Cycle Starts ✓ Cycle with a caller's waiting time greater than - prompt starts playing in the cycle that is equal to or greater than the time configured

From drop-down list, select	Description	Edit fields
		in this field.
<p>Expected Waiting Time</p>	<p>This prompt inform callers about their estimated waiting time in the queue.</p>	<ol style="list-style-type: none"> Click the 'Data' field's  icon; the following appears: <div data-bbox="1150 533 1442 730" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>EXPECTED WAITING TIME</p> <p>Audience</p> <p><input checked="" type="radio"/> All callers</p> <p><input type="radio"/> callers who entered the queue with an expected waiting time greater than (Min.)</p> <hr/> <p>Play Expected Waiting Time message every cycle from</p> <p><input checked="" type="radio"/> First Cycle Starts</p> <p><input type="radio"/> Cycle with a caller's waiting time greater than (Min.)</p> <p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="OK"/></p> </div> Under the Audience group, choose which callers will hear this prompt: <ul style="list-style-type: none"> ✓ All Callers ✓ Callers who entered the queue ... - plays the prompt only to callers who entered the queue from the position configured in the field or higher Under the Play Expected Waiting Time every cycle from group, select one of the following options: <ul style="list-style-type: none"> ✓ First Cycle Starts ✓ Cycle with a caller's waiting time greater than - prompt

From drop-down list, select	Description	Edit fields
		<p>starts playing in the cycle that is equal to or greater than the time configured in this field</p>
<p>Menu</p>	<p>Configure an in-queue DTMF menu to allow callers to make actions during their in-queue waiting time.</p>	<ol style="list-style-type: none"> From the 'Menu Prompt' drop-down list, select a pre-configured prompt. For more information about these prompts, see Adding a Voice Prompt on page 71. <div data-bbox="1145 949 1442 1279" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div> Under the Play Menu every cycle from group, select one of the following options: <ul style="list-style-type: none"> ✓ First Cycle Starts ✓ Cycle with a caller's waiting time greater than - menu's prompt starts playing in the cycle that is equal to or greater than the

From drop-down list, select	Description	Edit fields
		<p>time configured in this field.</p> <ol style="list-style-type: none"> 3. In the 'Max Wait Time' field, enter how much time to wait in seconds (0-30) until the user presses the DTMF key. 4. In the 'Max Tries' field, enter how many times to repeat the prompts when there is no response from the user. 5. Under the Key Actions group, select one or more of the following options in the 'Action' drop-down list: <ul style="list-style-type: none"> ✓ Leave a Message ✓ Send SMS ✓ Stay in Queue ✓ Disconnect ✓ Callback - allows callers to request a callback, reserving their place in the queue. When it's their turn, Voca CIC automatically

From drop-down list, select	Description	Edit fields
		<p>calls them back.</p> <p>6. For more information on the above actions, see Actions on page 279.</p>

16. Click **Save Changes**.

Editing Flex Queues

The procedure below describes how to edit a Flex Queue.

➤ **To edit a Flex Queue:**

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

QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE
JIRA expert		50	20:00	Round Robin	Worker Queue
IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue

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

QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE
<input checked="" type="checkbox"/> JIRA expert		50	20:00	Round Robin	Worker Queue
<input type="checkbox"/> IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue

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

Edit Flex Queue

Name*

Description


Queue Greeting


Music on Hold


Routing Type


No Answer Timeout (Sec.)

Supervisors

Supervisor 

Queue Members 

Queue Member* 

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

[Save Changes](#)

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

Deleting a Flex Queue

The procedure below describes how to delete a Flex Queue.

➤ **To delete a Flex Queue:**

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

Queues							
Search						Add New	Actions
<input type="checkbox"/>	QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE	
<input type="checkbox"/>	JIRA expert		50	20:00	Round Robin	Worker Queue	
<input type="checkbox"/>	IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue	

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

Queues							
Search						Add New	Actions
<input checked="" type="checkbox"/>	QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE	
<input type="checkbox"/>	JIRA expert		50	20:00	Round Robin	Worker Queue	
<input checked="" type="checkbox"/>	IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue	

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 Worker Queues

Worker Queues provide a method of intelligent routing of customers to Workers when they all registered to the queue to handle customer requests. With this skill-based routing capability, the Administrator can ensure that the interaction 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.

Digital Engagement Tenants support omnichannel capabilities, enabling integration of Voice, Email, and Chat channels.

Each channel is fully customizable and operates independently within the same queue.

Adding a Worker Queue

The procedure below describes how to add a new Worker Queue for Voice, Email and Chat channels.

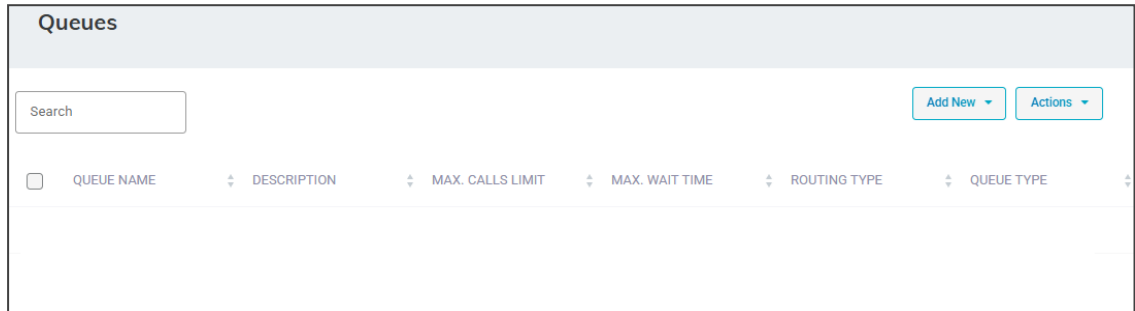
- [Adding a worker queue for voice](#) on the next page
- [Adding a worker queue for email](#) on page 138
- [Adding a worker queue for chat](#) on page 139

Adding a worker queue for voice

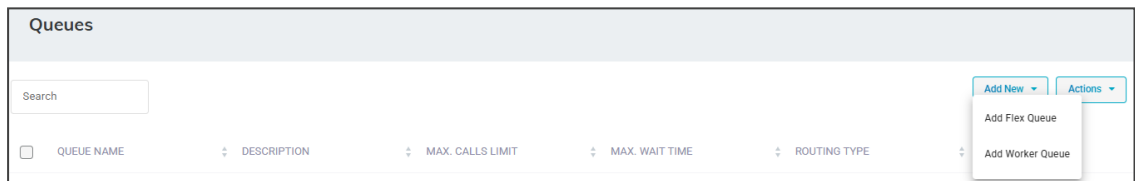
This procedure outlines the steps to create a new skill-based routing queue for voice, ensuring that incoming calls are directed to the most qualified agents based on predefined skill criteria.

➤ To add a new Worker Queue for voice:

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



2. Click **Add New**; a drop-down menu appears:



3. From the drop-down menu, choose **Add Worker Queue**; the following appears:

4. In the 'Name' field, enter the name of the Queue.
5. In the 'Description' field, enter a short description for the Queue.
6. Select the **Voice** tab; and click the toggle button to enable the establishment of the channel for the queue. The following appears:

Queue Number

Queue Greeting

Recording Notification
None ⓘ

Music on Hold
Default

Routing Type
Round Robin

No Answer Timeout (Sec.)
30

Worker* +

Wrap-up Events Group
None

Max. Calls in Queue
50

When the Max. number of calls is reached

Action 1
Disconnect

Max. Wait Time (Min.)
20

Max. Wait Time (Sec.)
0

When the Max. wait time is reached

Action 1
Disconnect

Save Changes

7. In the 'Queue Number' field, type the number to display on the customer's side when Workers make outbound calls through the queue.
8. From the ' Queue Greeting' drop-down list, select the greeting to play when the call enters the queue.
9. (Optional) Allow admins to notify their callers if the call will be recorded or recorded and analyzed.

This notification will play at the beginning of queue while the caller is waiting.

From the 'Recording Notification' drop-down list, select **Calls may be recorded** or **Calls may be recorded and analyzed by AI**. Select **None** if you don't want to notify callers.

Admins can also upload their own audio file to the Prompt section (**Configuration > Prompts**) to use a custom recording instead of the system-defined options in the drop-down. Once uploaded, the custom recording will appear in the drop-down list.

10. From the 'Music on Hold' drop-down list, select the music to play while the caller is waiting in the queue.
11. From the 'Routing Type' drop-down list, select the appropriate routing type:
 - **Round Robin:** (Default) Sequentially searches for a Worker within the queue.
 - **Longest Available Worker:** Routes calls based on the worker who has not answered queue calls for the longest time.
 - **Skill-based Priority Routing:** Routes calls based on the Worker level of expertise (score level for each skill).
12. From the 'Worker' drop-down list, select the appropriate Worker name.
13. From the 'Wrap-up Events Group' drop-down list, select the appropriate value.



Wrap-up codes are listed in the Worker Application per incoming call selected queue.

14. In the 'Max. Calls in Queue' field, enter the maximum number of calls that can wait in the queue (1 to 99). When the maximum number of calls has been reached, the caller is automatically transferred to the relevant action, which is configured in the 'When the maximum number of calls is reached' field. For more information of possible actions, see [Actions](#).

Max. Calls in Queue

50

When the Max. number of calls is reached

Action 1

Disconnect



This limit requires the same or more licensed channels.

15. In the 'Max. Wait Time (Min.)' field, enter the maximum time in minutes that a call can wait in the queue.
16. In the 'Max. Wait Time (Sec.)' field, enter the maximum time in seconds that a call can wait in the queue.

When the maximum waiting time has been reached, the caller is automatically transferred to the relevant action, which is configured in the 'When the maximum wait time is reached' field. For more information of possible actions, see [Actions](#).

The screenshot shows a configuration form with two input fields at the top: 'Max. Wait Time (Min.)' with the value '20' and 'Max. Wait Time (Sec.)' with the value '0'. Below these is the heading 'When the Max. wait time is reached'. Underneath, there is an 'Action 1' dropdown menu set to 'Transfer to Queue' and a 'Data' text field containing 'JIRA expert' with a pencil icon to its right.

17. To configure an overflow action when all workers are logged out, select the 'Check for logged out Workers' check box, and then from the 'Action' drop-down list, select the action (**Play Prompt, Go-to menu, Disconnect, Silent Transfer to Phone, Send SMS, Transfer to Queue, Go-to Flow, or Leave Message**).


The screenshot shows a configuration form with a checked checkbox labeled 'Check for Logged-out Workers'. Below the checkbox is the heading 'When all workers in the queue are logged out'. Underneath, there is an 'Action 1' dropdown menu set to 'Disconnect'.


18. To provide callers with various actions and options during their waiting time, select the 'In-queue Settings' check box; the following appears:


The screenshot shows a configuration form with a checked checkbox labeled 'In-queue Settings'. Below the checkbox are two input fields: 'Start Cycle (Min.)' with the value '1' and 'Delay Between Cycles (Min.)' with the value '2'. Below these is the heading 'Menu Settings'. Underneath, there is a 'Convenient Prompt' dropdown menu and a 'Data' text field with a pencil icon to its right and a blue plus sign button to its left.

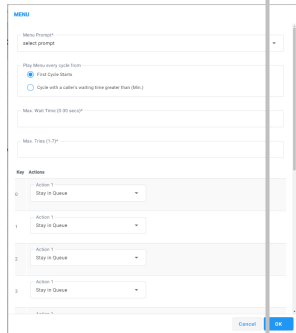
- In the 'Start Cycle' field, enter the duration (in minutes) that the basic 'music on hold' is played to the caller, before playing the set of in-queue actions to the caller.
- In the 'Delay Between Cycles' field, enter the duration (in minutes) that the basic 'music on hold' is played to the caller after the current set of in-queue actions and before the next set of in-queue actions begins.

- c. Under **Menu Settings**, select the actions and options that are played / offered when in-queue. Their order from top to bottom is the order in which they are played during the cycle. You can change the order by dragging and dropping each item.

From drop-down list, select	Description	Edit fields
<p>Convenient Prompt</p>	<p>This prompt plays a selected prompt</p>	<ol style="list-style-type: none"> 1. Click the 'Data' field's  icon; the following appears: <div data-bbox="1150 600 1442 824" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p style="margin: 0;">CONVENIENT PROMPT DIALOG</p> <p style="margin: 0;">Prompt* select prompt</p> <p style="margin: 0;">Play Convenient Prompt every cycle from</p> <p style="margin: 0;"><input checked="" type="radio"/> First Cycle Starts</p> <p style="margin: 0;"><input type="radio"/> Cycle with a caller's waiting time greater than (Min.)</p> <p style="margin: 0; text-align: right;">Cancel OK</p> </div> 2. From the 'Prompt' drop-down list, select a prompt from the Tenant's prompts list. 3. Under the Play Convenient Prompt every cycle from group, select one of the following options: <ul style="list-style-type: none"> ✓ First Cycle Starts - plays prompt according to duration configured in the 'Start Cycle' field (above). ✓ Cycle with a caller's waiting time greater than - prompt starts playing in the cycle that is equal to or greater than the

From drop-down list, select	Description	Edit fields
		time configured in this field.
<p>Position in Queue</p>	<p>This prompt informs callers about their position in the queue.</p>	<ol style="list-style-type: none"> Click the 'Data' field's  icon; the following appears: <div data-bbox="1145 571 1444 757" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>POSITION IN QUEUE</p> <p>Audience</p> <p><input checked="" type="radio"/> All callers</p> <p><input type="radio"/> Callers who entered the queue from position <input type="text" value="1"/> or higher</p> <hr/> <p>Play Position in Queue message every cycle from</p> <p><input checked="" type="radio"/> First Cycle Starts</p> <p><input type="radio"/> Cycle with a caller's waiting time greater than (Min): <input type="text" value=""/></p> <p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="OK"/></p> </div> Under the Audience group, choose which callers will hear this prompt: <ul style="list-style-type: none"> ✓ All Callers ✓ Callers who entered the queue from position - plays the prompt only to callers who entered the queue from the position that you configure in the field or higher Under the Play Position in Queue message every cycle from group, select one of the following options: <ul style="list-style-type: none"> ✓ First Cycle Starts ✓ Cycle with a caller's waiting

From drop-down list, select	Description	Edit fields
		<p>time greater than - prompt starts playing in the cycle that is equal to or greater than the time configured in this field.</p>
<p>Expected Waiting Time</p>	<p>This prompt inform callers about their estimated waiting time in the queue.</p>	<ol style="list-style-type: none"> Click the 'Data' field's  icon; the following appears: <div data-bbox="1150 813 1442 1010" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="margin: 0;">EXPECTED WAITING TIME</p> <p>Audience</p> <p><input checked="" type="radio"/> All callers</p> <p><input type="radio"/> callers who entered the queue with an expected waiting time greater than (Min.)</p> <p>Play Expected Waiting Time message every cycle from</p> <p><input checked="" type="radio"/> First Cycle Starts</p> <p><input type="radio"/> Cycle with a caller's waiting time greater than (Min.)</p> <p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="OK"/></p> </div> Under the Audience group, choose which callers will hear this prompt: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All Callers <input checked="" type="checkbox"/> Callers who entered the queue ... - plays the prompt only to callers who entered the queue from the position configured in the field or higher Under the Play Expected Waiting Time every cycle from group, select one of the following options:

From drop-down list, select	Description	Edit fields
		<ul style="list-style-type: none"> ✓ First Cycle Starts ✓ Cycle with a caller's waiting time greater than - prompt starts playing in the cycle that is equal to or greater than the time configured in this field
<p>Menu</p>	<p>Configure an in-queue DTMF menu to allow callers to make actions during their in-queue waiting time.</p>	<ol style="list-style-type: none"> 1. From the 'Menu Prompt' drop-down list, select a pre-configured prompt. For more information about these prompts, see Adding a Voice Prompt on page 71.  <ol style="list-style-type: none"> 2. Under the Play Menu every cycle from group, select one of the following options: <ul style="list-style-type: none"> ✓ First Cycle Starts ✓ Cycle with a caller's waiting

From drop-down list, select	Description	Edit fields
		<p>time greater than - menu's prompt starts playing in the cycle that is equal to or greater than the time configured in this field.</p> <p>3. In the 'Max Wait Time' field, enter how much time to wait in seconds (0-30) until the user presses the DTMF key.</p> <p>4. In the 'Max Tries' field, enter how many times to repeat the prompts when there is no response from the user.</p> <p>5. Under the Key Actions group, select one or more of the following options in the 'Action' drop-down list:</p> <ul style="list-style-type: none"> ✓ Leave a Message ✓ Send SMS ✓ Stay in Queue ✓ Disconnect ✓ Callback - allows callers to request a

From drop-down list, select	Description	Edit fields
		<p>callback, reserving their place in the queue. When it's their turn, Voca CIC automatically calls them back.</p> <p>6. For more information on the above actions, see Actions on page 279.</p>

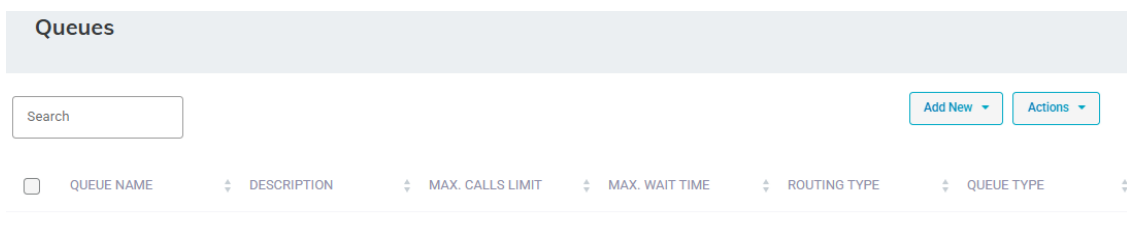
19. Click **Save Changes**.

Adding a worker queue for email

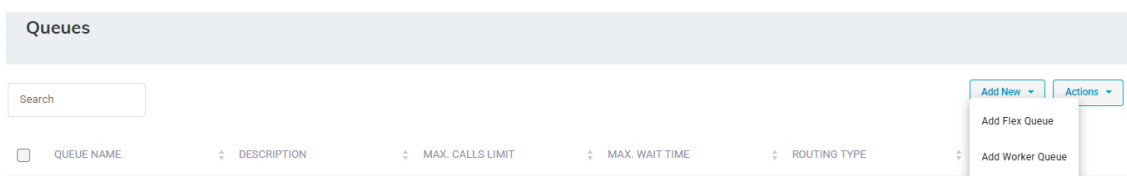
This procedure details the steps to create a new worker queue for email, ensuring that incoming emails are assigned to the most qualified agents based on predefined skill criteria

➤ **To add a new Worker Queue for email:**

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



2. Click **Add New**; a drop-down menu appears:



3. From the drop-down menu, choose **Add Worker Queue**.

4. In the 'Name' field, enter the name of the Queue.

5. In the 'Description' field, enter a short description for the Queue.

6. Select the **Email** tab; the following appears:

The screenshot shows the configuration page for the Email channel. At the top, there are three tabs: 'Voice', 'Email', and 'Chat'. The 'Email' tab is selected and underlined. On the left, there is a blue toggle switch that is turned on. Below the toggle are four configuration fields:

- Routing Type:** A dropdown menu with 'Round Robin' selected.
- Route to Last Worker:** An unchecked checkbox.
- Worker*:** A dropdown menu that is currently empty, with a blue plus icon to its right.
- Wrap-up Events Group:** A dropdown menu with 'None' selected.
- Conversation Template Group:** A dropdown menu with 'None' selected.

At the bottom right of the configuration area, there is a blue button labeled 'Save Changes'.

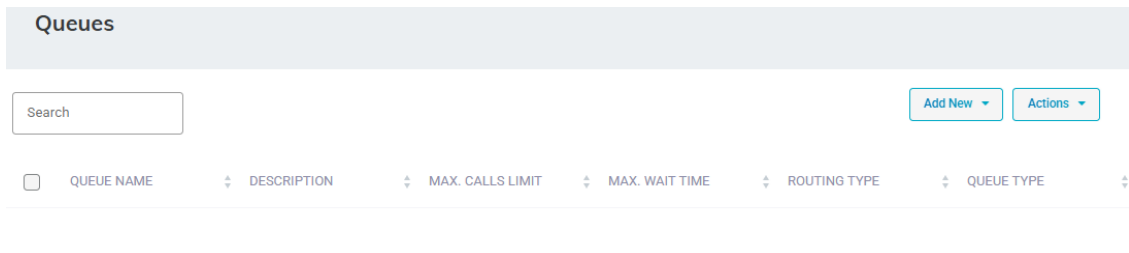
7. Click the toggle button to enable the establishment of the channel for the queue.
8. From the 'Routing Type' drop-down list, select the appropriate routing type:
 - **Round Robin:** (Default) Sequentially searches for a Worker within the queue.
 - **Longest Available Worker:** Routes emails based on the worker who has not answered queue email interactions for the longest time.
 - **Skill-based Priority Routing:** Routes calls based on the Worker level of expertise (score level per skill).
9. Select the 'Route to Last Worker' check box to route an ongoing chained emails to the last agent who handled the customer interaction. If the last agent is unavailable, the interaction is forwarded to the next available skilled Worker.
10. In the 'Last Interaction (Days)' field, define the maximum period for which an ongoing interaction is routed to the last agent.
11. From the 'Worker' drop-down list, select the appropriate Worker names.
12. From the 'Wrap-up Events Group' drop-down list, select the appropriate value.
13. From the 'Conversation Template Group' drop-down list, select the template group.
14. Click **Save Changes**.

Adding a worker queue for chat

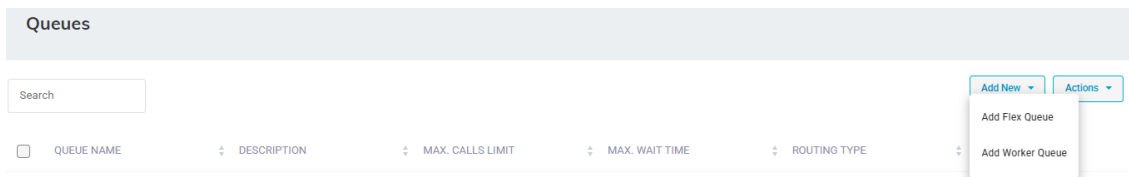
This procedure explains the steps to create a new worker queue for chat, ensuring that incoming chat requests are routed to the most qualified agents based on predefined skill criteria.

➤ **To add a new Worker Queue for chat:**

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



2. Click **Add New**; a drop-down menu appears:



3. From the drop-down menu, choose **Add Worker Queue**.
4. In the 'Name' field, enter the name of the Queue.
5. In the 'Description' field, enter a short description for the Queue.
6. Select the **Chat** tab; the following appears:

New Worker Queue

Name*

Description

Voice
 Email
 Chat

Routing Type
 Round Robin

Route to Last Worker

Worker* +

Wrap-up Events Group
 None

Conversation Template Group
 None

Workers and Customers

Max. Chats In Queue
 50

Enable Conversation Transcripts

Attachment Sharing
 Workers and Customers

Max. Chats In Queue
 50

When the Max. number of chats is reached

Action 1
 Send a message and disconnect from queue

Data*

Max. Wait Time (Min.)
 20

[Save Changes](#)

7. Click the toggle button to enable the establishment of the channel for the queue.
8. From the 'Routing Type' drop-down list, select the appropriate routing type:
 - **Round Robin:** (Default) Sequentially searches for a Worker within the queue.
 - **Longest Available Worker:** Routes chats based on the worker who has not answered queue chat interactions for the longest time.
 - **Skill-based Priority Routing:** Routes calls based on the Worker level of expertise (score level per skill).
9. Select the 'Route to Last Worker' check box to route a returning customer to the last agent who handled the customer interaction. If the last agent is unavailable, the interaction is forwarded to the next available skilled Worker.
 - In the 'Last Interaction (Days)' field, define the maximum period for which a returning customer is routed to the last agent.

10. From the 'Workers' drop-down list, select the appropriate Worker names.
11. From the 'Wrap-up Events Group' drop-down list, select the appropriate value.
12. From the 'Conversation Template' drop-down list, select the template group.
13. Click the **Enable Conversation Transcripts** toggle button to turn on the feature that allows Webchat users to download their conversation transcripts with the Workers.



This field is not applicable to SMS interactions.

14. From the 'Attachment Sharing' drop-down list, select the Webchat participants that are allowed to transfer files.



This field is not applicable to SMS interactions.

15. In the 'Max. Chats in Queue' field, enter the maximum number of chats that can wait in the queue (1 to 120). When the maximum number of calls is reached, the user is automatically transferred to the relevant action, which is configured under the **When the Max. number of chats is reached** group ('Action' and 'Data' fields).

Max. Chats In Queue

When the Max. number of chats is reached

Action 1

Data

16. In the 'Max. Wait Time' field, enter the maximum time that a chat can wait in the queue. When the maximum waiting time is reached, the user is automatically transferred to the relevant action, which is configured under the **When the Max. wait time is reached** group ('Action' and 'Data' fields).

Max. Wait Time (Min.)

When the Max. wait time is reached

Action 1

Data

17. Select **Check for Logged-out Workers**.
18. Click **Save Changes**.

Editing a Worker Queue

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

➤ To edit a Worker Queue:

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

<input type="checkbox"/>	QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE
<input type="checkbox"/>	JIRA expert		50	20:00	Round Robin	Worker Queue
<input type="checkbox"/>	IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue

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

<input checked="" type="checkbox"/>	QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE
<input checked="" type="checkbox"/>	JIRA expert		50	20:00	Round Robin	Worker Queue
<input type="checkbox"/>	IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue

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

Edit Worker Queue

Name*

Description

Voice

Queue Number

Queue Greeting

Recording Notification ⓘ

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

Deleting a Worker Queue

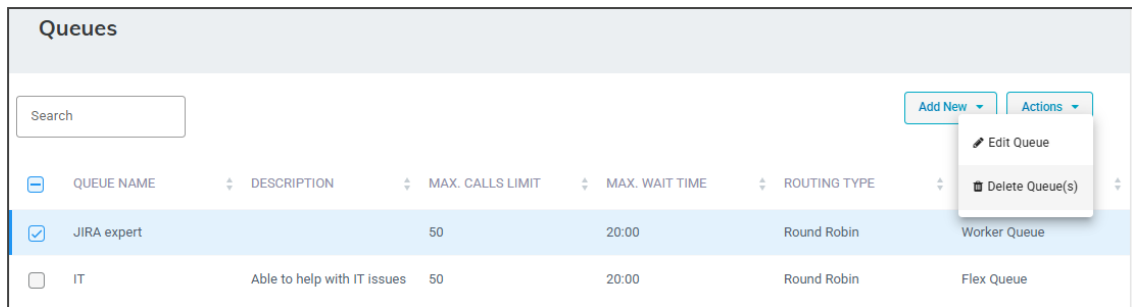
The procedure below describes how to delete a Worker Queue.

➤ To delete a Worker Queue:

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

Queues						
<input type="text" value="Search"/>	<input type="button" value="Add New"/>		<input type="button" value="Actions"/>			
<input type="checkbox"/>	QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	QUEUE TYPE
<input type="checkbox"/>	JIRA expert		50	20:00	Round Robin	Worker Queue
<input type="checkbox"/>	IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue

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



	QUEUE NAME	DESCRIPTION	MAX. CALLS LIMIT	MAX. WAIT TIME	ROUTING TYPE	
<input checked="" type="checkbox"/>	JIRA expert		50	20:00	Round Robin	Worker Queue
<input type="checkbox"/>	IT	Able to help with IT issues	50	20:00	Round Robin	Flex Queue

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.

New Working Hours

Name*

Week Day	Working Day	Start Hour		End Hour		
Sunday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>
Monday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>
Tuesday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>
Wednesday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>
Thursday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>
Friday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>
Saturday	<input type="checkbox"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="text" value="00"/>	<input type="button" value="+"/>

3. In the 'Name' field, enter the name of the working hours.
4. In the 'Working Days' check box, define the working days and hours, each appropriate working day.
5. Select the 'Start Hour' and 'End Hour' for each applicable day.
6. Click **Save Changes**.
7. In the following example, we have defined the company's working days with shifts from Monday till Friday.

New Working Hours

Name*

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

[Save Changes](#)

Editing Working Hours Set

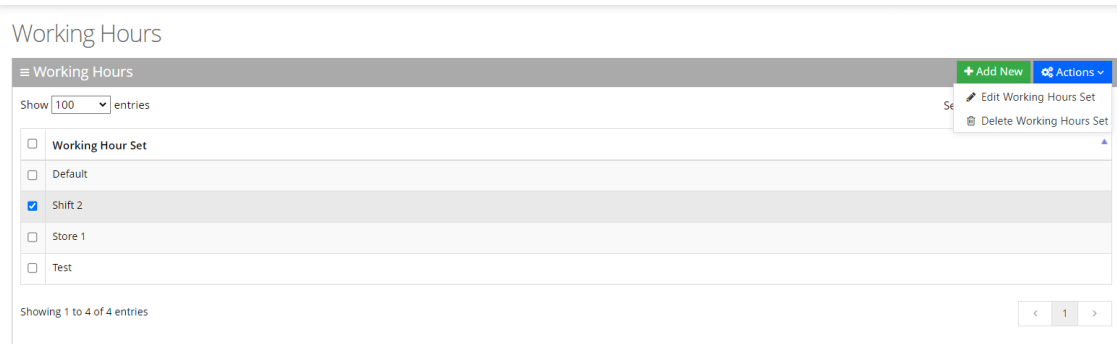
The procedure below describes how to edit a Working Hours Set.

➤ To edit a Working Hours Set:

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



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



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

New Working Hours

Name*

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

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

Deleting Working Hours Set

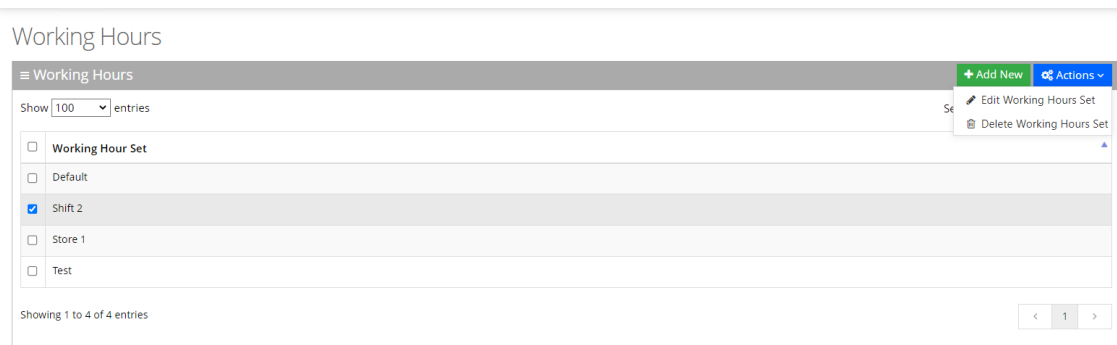
The procedure below describes how to delete a Working Hours Set.

➤ **To delete a Working Hours Set:**

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



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



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

Defining Events and Holidays

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

Adding Events and Holidays

➤ **To add events and holidays:**

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




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

Add Event Set


Event Set Name*

+ Add Event Record

Description* Event Dates 

Action 1

Save Changes

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:

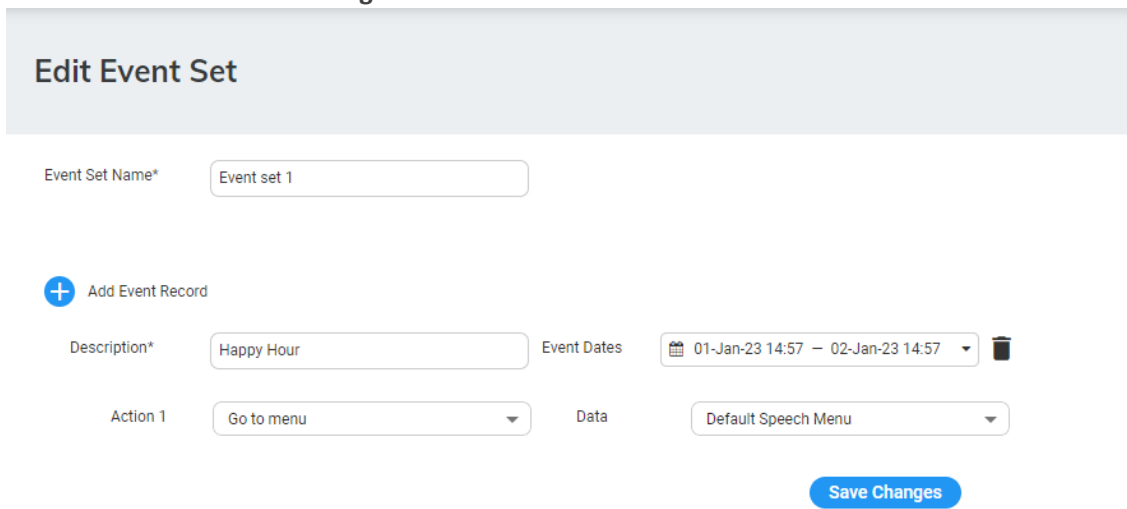
1. Open the Telephony Settings screen (**Configuration > Events & Holidays**).
2. Select the event or holiday that you wish to edit.
3. Click **Actions**; the following appears:

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](#)
- [General Email Configuration](#)
- [Hybrid Worker](#)
- [Omnichannel Configuration](#)
- [Cognitive Services](#)
- [Call Recordings](#)
- [Data Export](#)

Teams Presence Settings

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

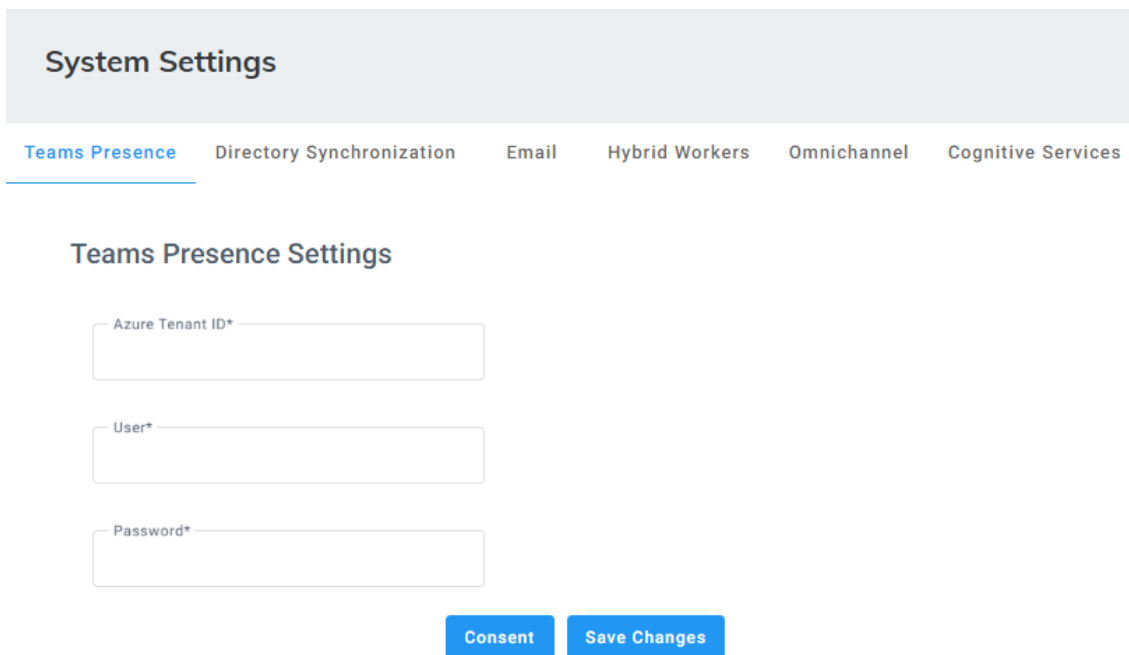


The organization Administrator (Microsoft 365) should grant tenant-wide admin consent to "Directory and Presence" applications on behalf of the organization, this is done through an app registration process:

1. Enter the Azure tenant details in the required fields below.
2. Click **Consent** to initiate the integration.
3. An **Azure Global Administrator** must approve the request to register the application with the necessary permissions.
4. Once approved, the application is created in Azure, granting Voca access to the requested data—the organization's contacts Teams presence information.

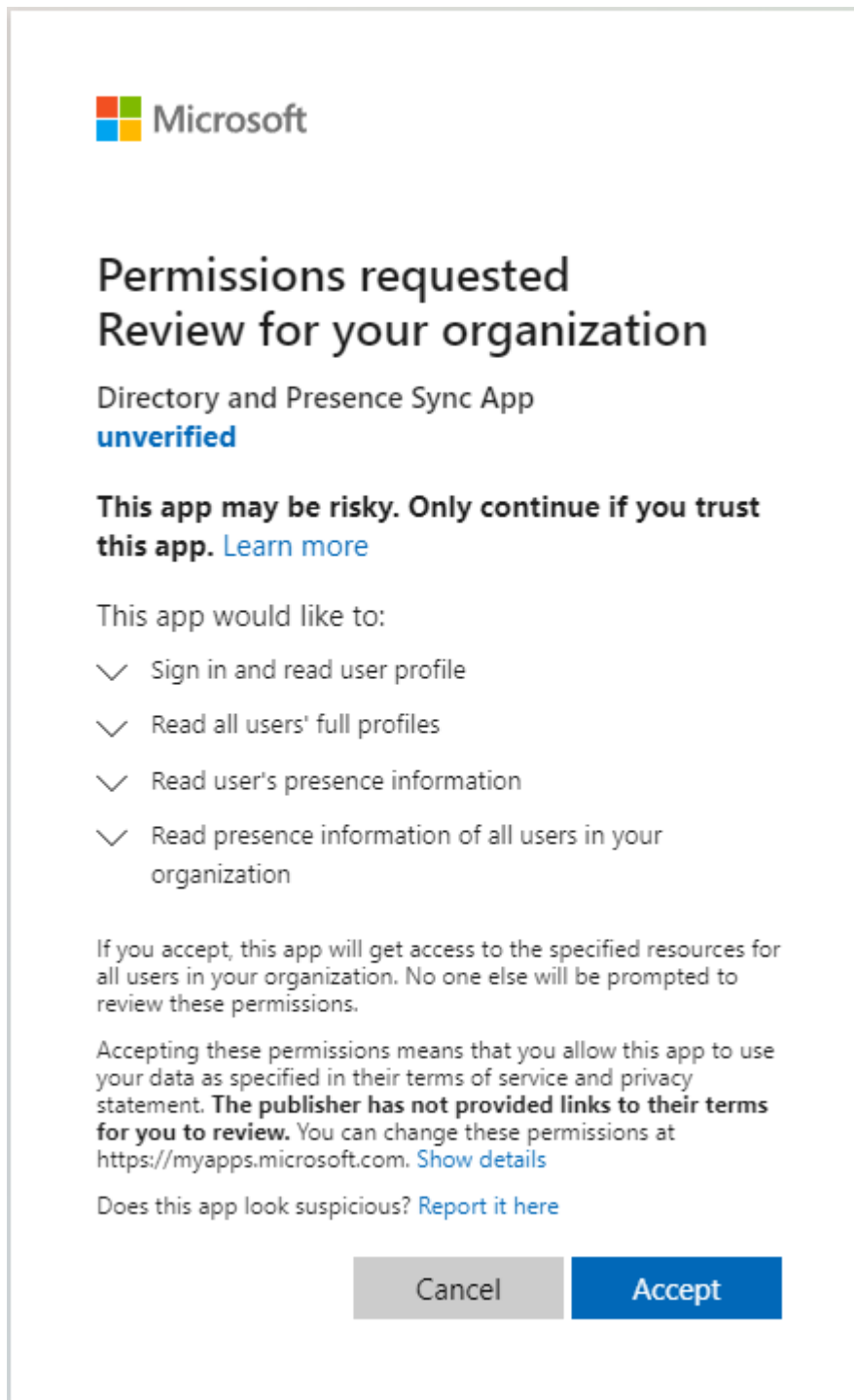
➤ **To obtain permissions:**

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



The screenshot shows the 'System Settings' page with a navigation bar containing 'Teams Presence', 'Directory Synchronization', 'Email', 'Hybrid Workers', 'Omnichannel', and 'Cognitive Services'. The 'Teams Presence' tab is selected. Below the navigation bar is the 'Teams Presence Settings' section, which contains three input fields: 'Azure Tenant ID*', 'User*', and 'Password*'. At the bottom right of the form are two buttons: 'Consent' and 'Save Changes'.

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



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

Directory Synchronization

Synchronize Contacts from Active Directory, using either Azure Active Directory (AD) or Lightweight Directory Access Protocol (LDAP) .

■ [Configure Azure AD](#)

■ [Configure LDAP](#)

Configuring Azure AD

The process below describes what is required when synchronizing between Voca tenant with Azure Active Directory.



The organization Administrator (Microsoft 365) should grant tenant-wide admin consent to “Directory and Presence” applications on behalf of the organization, this is done through an app registration process:

1. Enter the Azure tenant details in the required fields below.
2. Click **Consent** to initiate the integration.
3. An **Azure Global Administrator** must approve the request to register the application with the necessary permissions.
4. Once approved, the application is created in Azure, granting Voca access to the requested data— the organization's contact list.



The consent process is required once for Azure AD sync and once for Teams Presence.

➤ To configure Azure AD:

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

The screenshot shows the 'System Settings' page with the 'Directory Synchronization' tab selected. The 'Synchronization Mode' dropdown menu is set to 'None'. A 'Save Changes' button is visible at the bottom right.

System Settings

Teams Presence **Directory Synchronization** Email Hy

Directory Synchronization

Synchronization Mode
None

Save Changes

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

Directory Synchronization

Synchronization Mode
 Azure AD

Azure Connection Details

Azure Tenant ID*

User*

Password*

Filter

Consent

Check Connection

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


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



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



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

8. Under the **Azure AD User Attributes** group, enter the following:
 - a. In the 'Unique ID' field, enter "Id".
 - b. In the 'First Name' field, enter "givenName".
 - c. In the 'Last Name' field, enter "surname".

- d. In the 'Extension' field, enter "businessPhone".
- e. In the 'Mobile' field, enter "mobilePhone".
- f. In the 'Department' field, enter "department".
- g. In the 'Email' field, enter "mail".

Azure AD User Attributes

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

9. Select the following fields for when you want to import contacts from the Azure AD server:
 - Days
 - Start Time not before
 - Start time not before (Sec)

Import Schedule

Days

- Sunday Monday
 Tuesday Wednesday
 Thursday Friday
 Saturday

Start time not before*
23

Start time not before (.Sec)*
0

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

- None
- Success
- Failure
- All

Email Notification

Send on*
None

Email Addresses

Import Now

Save Changes

11. Click **Save Changes**.

12. Click **Import Now** to import contacts from the Azure AD server immediately (Optional).

Configuring LDAP

Synchronize between Voca tenant with LDAP (Lightweight Directory Access Protocol).

➤ To configure LDAP:

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

System Settings

Teams Presence

Directory Synchronization

Email

Hy

Directory Synchronization

Synchronization Mode
None

Save Changes

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

System Settings

Teams Presence

Directory Synchronization

Email

Directory Synchronization

Synchronization Mode
LDAP

LDAP Connection

Server*

Port*
389

LDAP Version*
Default

User*

Password*

baseDN*

Filter Usage
Append to default

Filter

Encoding
Default

Check Connection

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.

LDAP User Attributes

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

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

- Days
- Start Time
- Start time not before (Sec)

Import Schedule

Days

- Sunday Monday
 Tuesday Wednesday
 Thursday Friday
 Saturday

Start time not before*

23

Start time not before (.Sec)*

0

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

Auto Attendant Address Book Sync

Incremental Mode

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

- None
- Success
- Failure
- All

Email Notification

Send on*

None

Email Addresses

Import Now

Save Changes

16. Click **Save Changes**.

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

General Email Configuration

The procedure below describes how to configure general email settings. It is used for sending AD synchronization alarms, scheduled reports, missed calls notifications, and 'leave a message'.

Configuration depends on your server type:

- [Configuring Email for Azure](#) below
- [Configuring Email for SMTP](#) on page 165

Configuring Email for Azure

➤ To configure general email settings for Azure:

- Open the System Settings page (**Configuration > System Settings > Email**); the following appears:

Email Settings

General Email Configuration

Server Type*
None ▼

Test Email

Save Changes

- Under **General Email Configuration**, from the 'Server Type' drop-down list, select **Azure**; the following appears:

Email Settings

General Email Configuration

Server Type*
Azure ▼

Connect Method*
Audiocodes Hosted App ▼

Azure Tenant ID*

From Address*

Consent

Test Email

Save Changes

3. From the 'Connect Method' drop down list, choose **AudioCodes Hosted App, Self-Hosted App (Delegated), or Self-Hosted App (Application)**.
4. Follow these steps based on the 'Connect Method' you selected:

Connect Method	Steps
AudioCodes Hosted App:	<ol style="list-style-type: none"> 1. In the 'Azure Tenant ID' field, enter the Azure Tenant ID from which to receive the emails. 2. In the 'From Address' field, enter the address from where emails are sent.
Self-Hosted App (Delegated)	<ol style="list-style-type: none"> 1. In the 'Azure Tenant ID' field, type the Azure Tenant ID from which to receive the emails. 2. In the 'App ID' field, type the App ID. 3. In the 'Username' field, type the name of the user that is defined on the Azure tenant with permissions to access the emails. 4. In the 'Password' field, type the user's password. 5. In the 'From Address' field, type the address from where emails are to be sent.
Self-Hosted App (Application)	<ol style="list-style-type: none"> 1. In the 'Azure Tenant ID' field, type the Azure Tenant ID from which to receive the emails. 2. In the 'App ID', type the App ID. 3. In the 'Secret Key', type the application secret key. 4. In the 'From Address', type the address from where emails are to be sent.

5. Click **Save Changes**.

Configuring Email for SMTP

➤ **To configure general email settings for SMTP:**

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

Email Settings

General Email Configuration

Server Type*
None ▼

Test Email

Save Changes

2. Under **General Email Configuration**, from the 'Server Type' drop-down list, select **SMTP**; the following appears:

Email Settings

General Email Configuration

Server Type*
SMTP ▼

SMTP

Server Address*

TLS

Port*

Username

Password

From Address*

Test Email

Save Changes

3. In the 'Server Address' field, type the URL of the email server. It can include an FQDN or IP address.
4. Select the 'TLS' check box if the email server uses TLS.

5. In the 'Port' field, type the port ('25' or '587') used for the email server.
6. In the 'Username' field, type the username for the email address you're using.
7. In the 'Password' field, type the password for the email address you're using.
8. In the 'From Address' field, type the address from where the email is to be sent.
9. Click **Save Changes**.

Hybrid Workers

Enable this feature to allow selected Workers to receive calls via Microsoft Teams native application. The selection is done within the 'Workers Group' page or by Supervisors via the Worker Application.

➤ To enable Hybrid Workers:

1. Open the System Settings page (**Configuration > System Settings > Hybrid Workers**), the following appears:

Hybrid Workers

Allow Hybrid Worker ⓘ

Allow Routing on Teams Presence Status

- Available
- Busy
- Away

Save Changes

2. Select the 'Allow Hybrid Worker' check box to enable the feature in the Tenant.
3. Under 'Allow Routing on Teams Presence Status', select the Workers' presence status in Microsoft Teams that is considered 'Ready' to accept a call.



Currently, statuses 'Available', 'Busy', and 'Away' are not configurable.

Omnichannel Configuration

The procedures below describe how to configure omnichannel settings. This configuration enables Voca to manage Email and SMS interactions by integrating with your Email server and/or SMS Provider.

Configuration depends on your server type:

- [Configuring Omnichannel Email for Azure on the next page](#)
- [Configuring Omnichannel Email for SMTP & IMAP on page 168](#)

■ [Configuring Omnichannel settings for SMS on page 170](#)

Configuring Omnichannel Email for Azure

Configure your Azure tenant so that email interactions can be managed by Voca.

This process requires the the organization Administrator (Microsoft 365) to grant tenant-wide admin consent to omnichannel email applications on behalf of the organization.

➤ **To configure omnichannel email settings for Azure:**

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

Email Configuration

Server Type*
None

Test Email Save Changes

2. From the 'Server Type' drop-down list, select **Azure**; the following appears:

Email Configuration

Server Type*
Azure

Connect Method*
AudioCodes Hosted App

Azure Tenant ID*

From Address*

Consent Test Email Save Changes

3. From the 'Connect Method' drop down list, choose **AudioCodes Hosted App, Self-Hosted App (Delegated), or Self-Hosted App (Application)**.
4. Follow these steps based on the 'Connect Method' you selected:

Connect Method	Steps
AudioCodes Hosted App	<ol style="list-style-type: none"> 1. In the 'Azure Tenant ID' field, enter the Azure Tenant ID from

Connect Method	Steps
	<p>which to receive the emails.</p> <ol style="list-style-type: none"> <li data-bbox="954 327 1394 434">2. In the 'From Address' field, enter the address from where emails are sent.
Self-Hosted App (Delegated)	<ol style="list-style-type: none"> <li data-bbox="954 479 1362 586">1. In the 'Azure Tenant ID' field, type the Azure Tenant ID from which to receive the emails. <li data-bbox="954 613 1353 685">2. In the 'App ID' field, type the App ID. <li data-bbox="954 712 1394 864">3. In the 'Username' field, type the name of the user that is defined on the Azure tenant with permissions to access the emails. <li data-bbox="954 891 1385 963">4. In the 'Password' field, type the user's password. <li data-bbox="954 990 1378 1097">5. In the 'From Address' field, type the address from where emails are to be sent.
Self-Hosted App (Application)	<ol style="list-style-type: none"> <li data-bbox="954 1142 1362 1249">1. In the 'Azure Tenant ID' field, type the Azure Tenant ID from which to receive the emails. <li data-bbox="954 1276 1385 1312">2. In the 'App ID', type the App ID. <li data-bbox="954 1339 1337 1411">3. In the 'Secret Key', type the application secret key. <li data-bbox="954 1438 1378 1545">4. In the 'From Address', type the address from where emails are to be sent.

5. Click **Save Changes**.

Configuring Omnichannel Email for SMTP & IMAP

Configure your SMTP & IMAP server so that email interactions can be managed by Voca.

➤ To configure email settings for SMTP & IMAP:

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

Email Configuration

Server Type*
None

Test Email Save Changes

- From the 'Server Type' drop-down list, select **SMTP & IMAP**; the following appears:

Email Configuration

Server Type*
SMTP & IMAP

SMTP

Server Address*
danielle.blander@audioco

TLS

Port*

Username
danielle.blander@audiocodes.i

Password

From Address*
danielle.blander@audiocodes.i

Test Email Save Changes

IMAP

Server Address*

TLS

Port*

Username*

Password*

Save Changes

3. Under **SMTP**, in the 'Server Address' field, type the URL of the email server. It can include an FQDN or IP address.
4. Select the 'TLS' check box if the email server uses TLS.
5. In the 'Port' field, type the port ('25' or '587') used for the email server.
6. In the 'Username' field, type the username for the email address you're using.
7. In the 'Password' field, type the password for the email address you're using.
8. In the 'From Address' field, type the address from where the email is to be sent.
9. Click **Save Changes**.



To complete the integration with your email channel, make sure that you configure the PowerShell commands described in [Adding Email Interactions](#) on page 49, on the customer's Azure Tenant to enable email interaction with a specific email mailbox.

10. Under **IMAP**, in the 'Server Address' field, type the URL of the email server. It can include an FQDN or IP address.
11. Select the 'TLS' check box if the email server uses TLS.
12. In the 'Port' field, type the port ('25' or '587') used for the email server.
13. In the 'Username' field, type the username for the email address you're using.
14. In the 'Password' field, type the password for the email address you're using.
15. Click **Save Changes**.

Configuring Omnichannel settings for SMS

Configure the integration with the service provider you will be using for the SMS omnichannel interactions.

➤ To configure omnichannel settings for SMS:

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

SMS

Telecom Provider
Twilio

Account SID*

Authentication Token*

Save Changes

- Under **SMS**, from the 'Telecom Provider' drop-down menu, select **Twilio** or **Bandwith**.
- Do the following per your chosen provider, enter the required information from your provider:

Telecom Provider	Enter values for...
Twilio	<ul style="list-style-type: none"> <input type="checkbox"/> Account SID <input type="checkbox"/> Authentication Token
Bandwith	<ul style="list-style-type: none"> <input type="checkbox"/> Account ID' <input type="checkbox"/> Application ID <input type="checkbox"/> API Key <input type="checkbox"/> API Secret

- Click **Save Changes**.

Cognitive Services

By default, our system provides the AudioCodes Text-to-Speech (TTS) service. However, you now have the option to use your own Azure TTS service. To do so, configure it in the System Settings under the **Cognitive Services** section by entering your Azure TTS key and region.

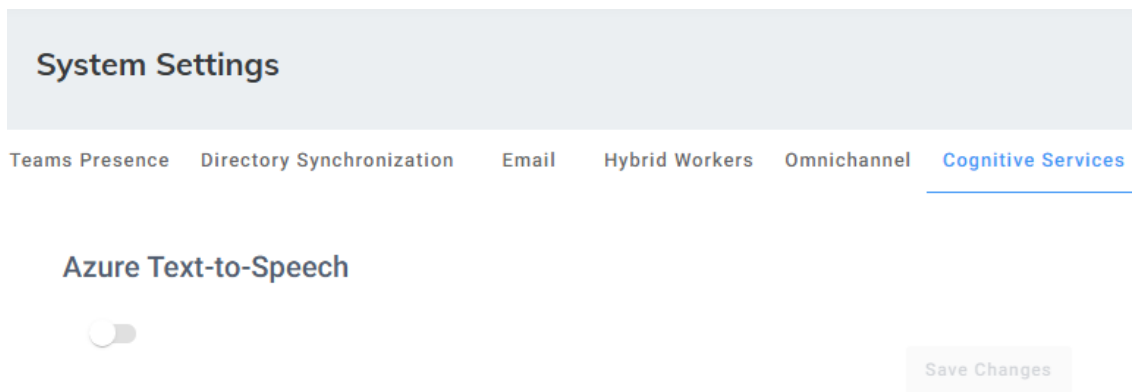


This change applies only to the Text-to-Speech block in the Flow Designer.

- If no configuration is provided, the system defaults to AudioCodes TTS.
- Once configured, Voca automatically switches to the specified Azure TTS service.

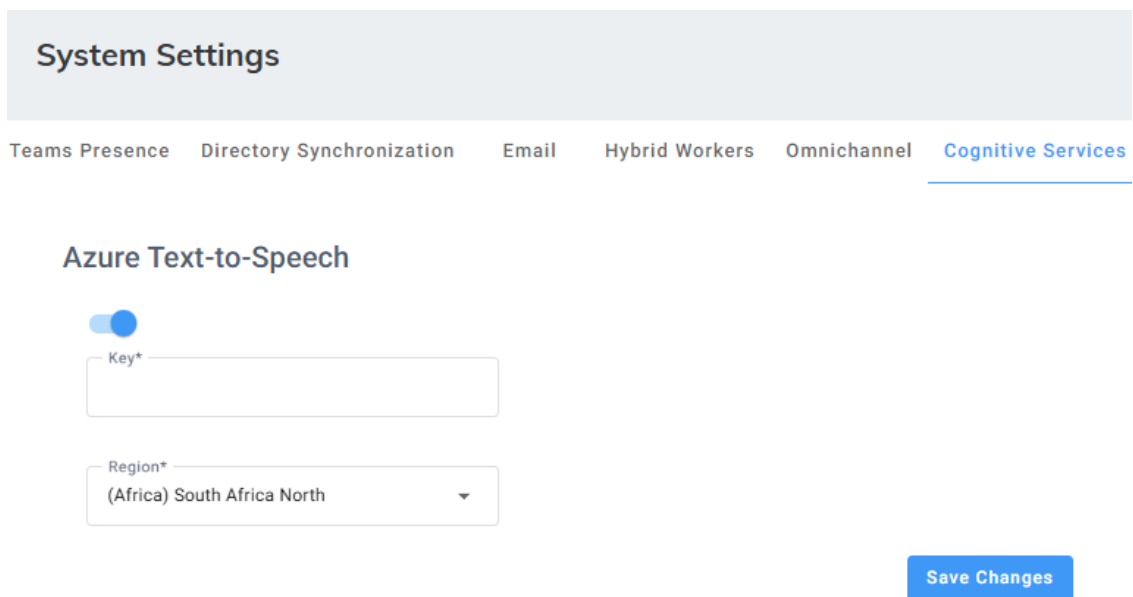
➤ To configure Azure TTS:

- Open the System Settings page (**Configuration > System Settings > Cognitive Services**); the following appears:



The screenshot shows the 'System Settings' page with the 'Cognitive Services' tab selected. Under the 'Azure Text-to-Speech' section, a toggle switch is currently turned off. A 'Save Changes' button is visible on the right side of the page.

2. Under **Azure Text-to-Speech**, Click the 'Enable/ Disable' toggle button; the following appears:



The screenshot shows the 'System Settings' page with the 'Cognitive Services' tab selected. Under the 'Azure Text-to-Speech' section, the toggle switch is now turned on. Below the toggle, there is a text input field labeled 'Key*' and a dropdown menu labeled 'Region*' with '(Africa) South Africa North' selected. A blue 'Save Changes' button is visible on the right side of the page.

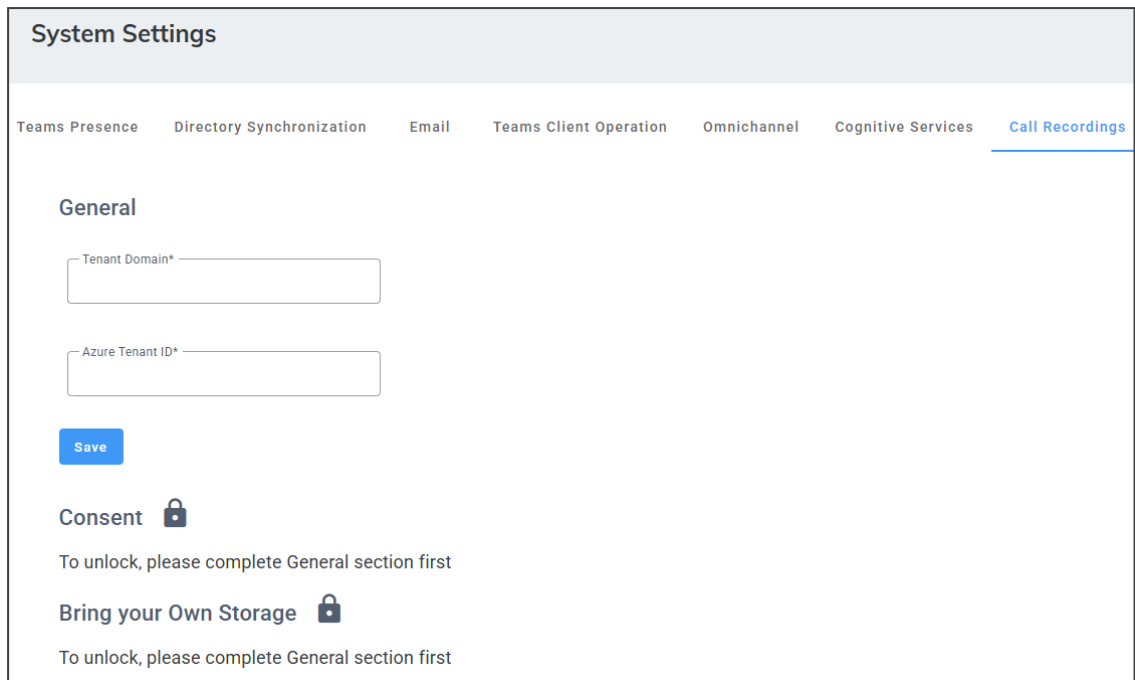
3. In the 'Key' field, enter the your Azure Text-to-Speech key.
4. From the 'Region' field, select the Azure locale voice.
5. Click **Save Changes**.

Call Recordings



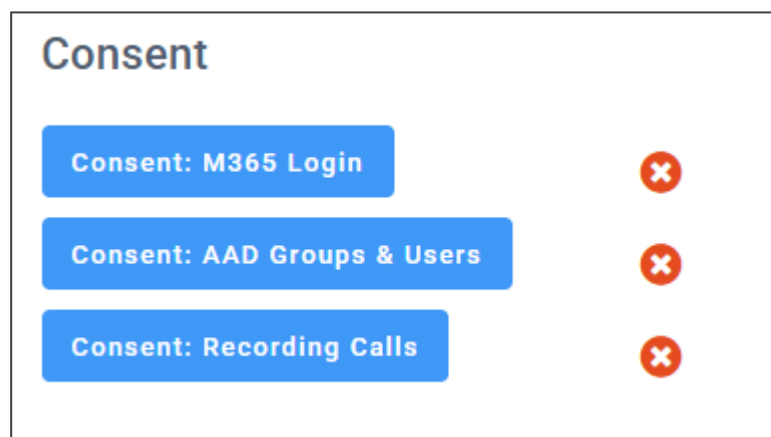
The Call Recordings tab is available only for tenants that have CIC2 or CIC3 configured as a built-in option.

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



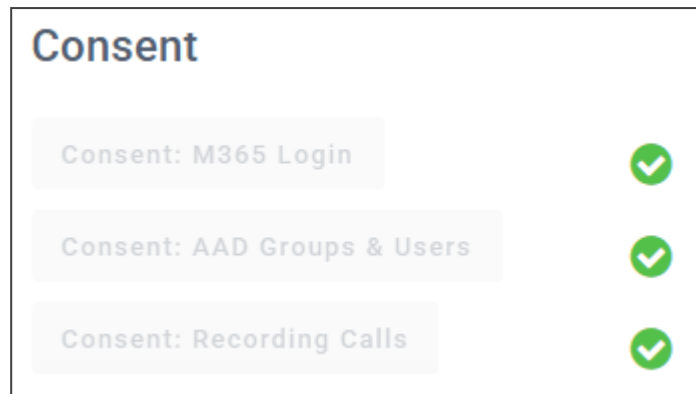
The screenshot shows the 'System Settings' interface for 'Call Recordings'. At the top, there is a navigation bar with tabs for 'Teams Presence', 'Directory Synchronization', 'Email', 'Teams Client Operation', 'Omnichannel', 'Cognitive Services', and 'Call Recordings'. The 'Call Recordings' tab is selected. Below the navigation bar, the 'General' section is visible. It contains two text input fields: 'Tenant Domain*' and 'Azure Tenant ID*'. Below these fields is a blue 'Save' button. Underneath the 'Save' button, there are two sections, both of which are locked (indicated by a padlock icon): 'Consent' and 'Bring your Own Storage'. Both sections have a message: 'To unlock, please complete General section first'.

2. Under 'General' field, enter the Tenant Domain and Azure Tenant ID.
3. Click **Save**. After saving, you need to complete three consent actions.

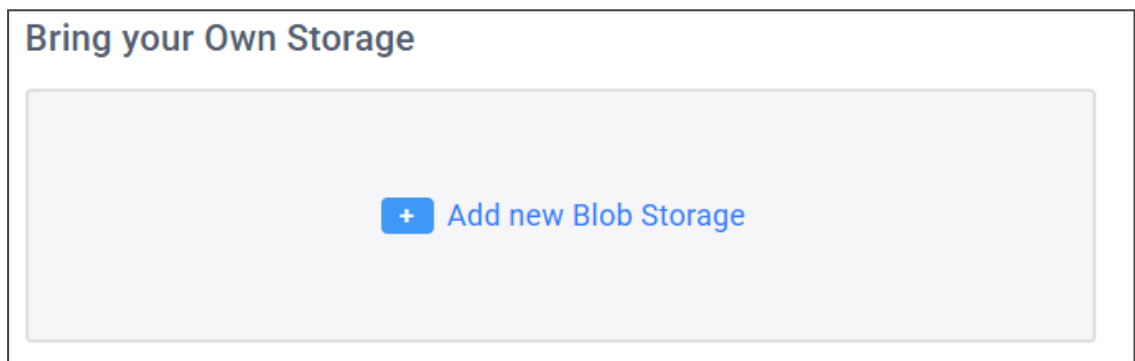


The screenshot shows the 'Consent' section of the System Settings. It features three blue buttons, each with a red 'X' icon to its right, indicating that the consent actions are not yet completed. The buttons are labeled: 'Consent: M365 Login', 'Consent: AAD Groups & Users', and 'Consent: Recording Calls'.

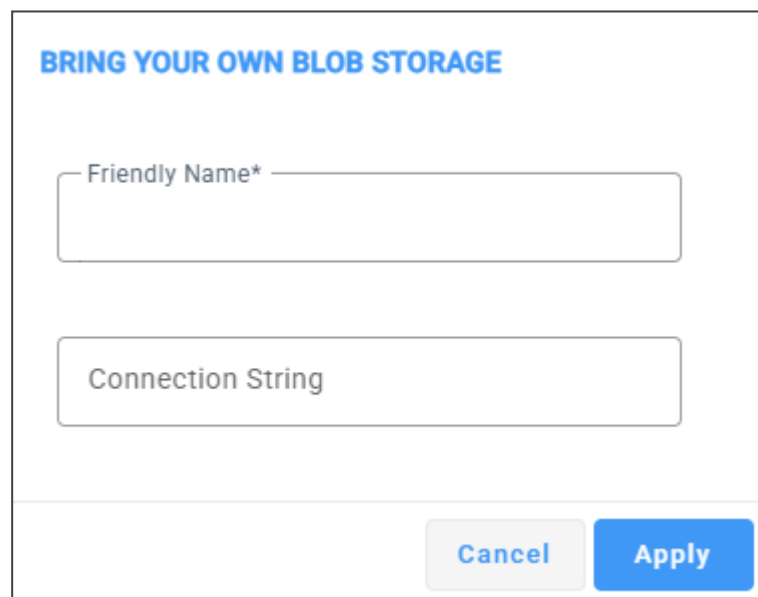
4. Click each of the buttons below and complete the Microsoft consent process. These consents are mandatory to enable call functionality in the customer's environment.
 - **Consent: M365 Login**
 - **Consent: AAD Groups & Users**
 - **Consent: Recording Calls**



5. Once completed, you can optionally configure your own storage (up to 10).



6. Click **Add new Blob Storage**.



The screenshot shows a form titled 'BRING YOUR OWN BLOB STORAGE' with the following elements:

- A text input field labeled 'Friendly Name*'.
- A text input field labeled 'Connection String'.
- At the bottom right, there are two buttons: a light gray 'Cancel' button and a blue 'Apply' button.

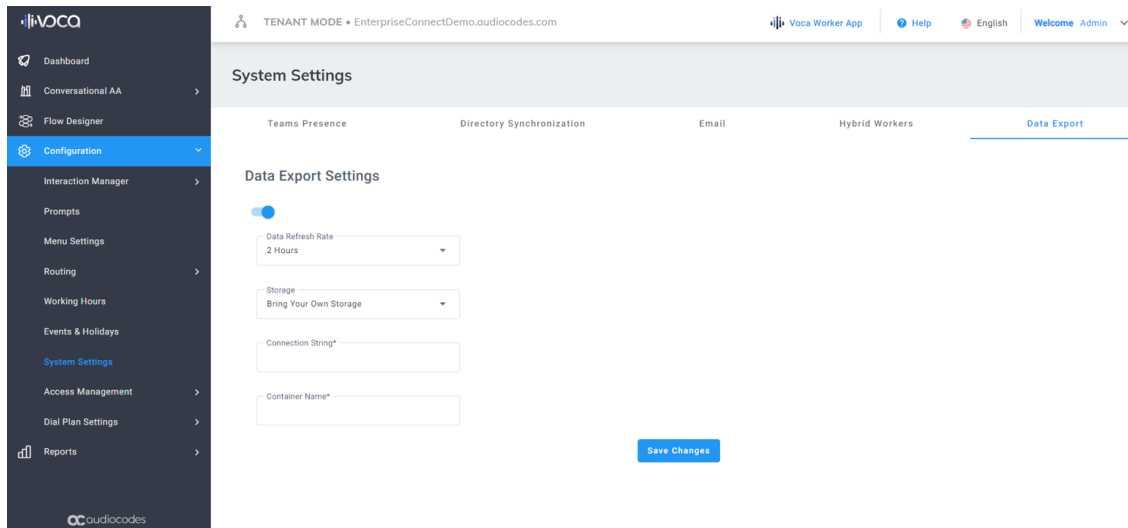
7. Click **Save Changes** to save your changes.
8. In the 'Friendly Name' field, enter a name for your storage.
9. Enter a connection string. An Azure Blob Storage connection string is a text value that specifies how your application connects to a specific storage account, including its location and authentication details.
10. Click **Apply**.

Data Export

The procedure below describes how to extract interaction raw data records from Voca CIC.

➤ To export data:

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



2. Click the toggle button to enable the Data Export feature.
3. From the Data Refresh Rate' drop-down list, choose the intervals in which new data will be downloaded (as a compressed '.tar' file containing multiple CSV files) to the storage platform defined below.
4. From the 'Storage' drop-down list, select one of the following:
 - **Bring Your Own Storage:** enables Voca CIC to automatically download interaction records to your designated storage.
 - i. In the 'Connection String' field, enter the connection string.
 - ii. In the 'Container Name' field, enter the container name.
 - **Voca Storage:** uses Voca's storage for extracting interaction records.
 - ◆ Click the **Generate Key** button to generate a token in UUID format, which can be used to authorize the request to download files using the API.



When generating a New Key, copy and save it immediately. It will not be displayed again.

5. Click **Save Changes**.

Pulling Tenant Data from VOCA CIC storage via API

To securely pull Tenant's data from Voca Storage, use the following external APIs:

- **Get Token:** <https://<domain>/api/DataExport/External/token> on the next page

- **Get Files:** <https://<domain>/api/DataExport/External/Files> below

Current Domain for All Voca CIC Environments

Region	Domain
IO	voca-dm.audiocodes.io
APAC	vocaaau-dm.audiocodesaas.com
EMEA	voca-dm.audiocodesaas.com
INDIA	vocaindia-dm.audiocodesaas.com
AMER	vocaus-dm.audiocodesaas.com

Get Token: <https://<domain>/api/DataExport/External/token>

files using the ``/api/DataExport/External/Files`` API (see the next section).

Usage

- URL: <https://<domain>/api/DataExport/External/token>
- Method: GET
- Request Headers: x-api-key: <user-api-key>
- The API key is generated in the UI during the initialization process.

Responses

- 200 OK: Token generation was successful.
- Example Response Body:

```
{"token": "123e4567-e89b-12d3-a456-426614174000"}
```

- 401 Unauthorized: Invalid API key
- 500 Internal Server Error: Failed to generate the token

Get Files: <https://<domain>/api/DataExport/External/Files>

This API is triggered by users to obtain download links to a tar file containing CSV files representing their data stored in the Voca Storage account. The user must provide a valid token, which can be retrieved using the ``/api/DataExport/External/token`` API.

Usage

- URL: <https://<domain>/api/DataExport/External/Token>

- Method: GET
- Request Headers: `Authorization: Bearer <token>`

The token is generated via the `/api/DataExport/External/token` API.

Responses

- 200 OK: Successfully retrieved file URLs.

Example Response Body

```
[
```

```
"https://<AzureResourceName>.blob.core.windows.net/<containerName>/<fileName>.tar",
```

```
"https://<AzureResourceName>.blob.core.windows.net/<containerName>/<fileName>.tar"
```

```
]
```

- 401 Unauthorized: Invalid token.
- 500 Internal Server Error: Failed to retrieve file links.



- The download links provide access to the `.tar` files from Voca Storage.`
- The links are valid for 30 minutes and must be used before they expire.
- Ensure that the token is still valid; it expires 1 hour after generation.

Access Management

Access Management lets you add or edit users and assign them specific Tenant privileges. By default, there are two predefined profiles available, Tenant Admin and Analytic Users. You can also create custom profiles, as needed. These profiles can be assigned to new or existing users, ensuring everyone has the right level of access based on their role.

Create a user and assign them a specific profile. The assigned profile determines the different of viewing or editing capabilities in the Voca CIC Tenant.

- [User Lists](#) - here you add or edit users.
- [Access Profiles](#) - here you can create a customized profile , edit the predefined profiles or clone profiles.
- [Recording Links](#) - here you can also can control who can access call recording links.

Configuring Users

This section describes how to add, edit and delete users from the Users List.

Adding Users

Add users to the organization's list. Create a user and assign a specific profile. The assigned profile determines the different of viewing or editing capabilities in the Tenant Voca CIC management.

➤ To add a user:

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

Users List

Email	Access Profile
eriel.smith@gmail.com	Analytic Users
danielle.blander@audiocodes.com	Tenant Admin
danielle.smith@gmail.com	Tenant Admin
GeorgeWhite@audiocodes.com	Synced Access Profile
mike.jackson@email.com	Supervisor

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

The User Lists page is described below:

- **Email:** Displays the user's email.
 - **Access Profile:** Displays 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.
2. Click **+Add New** to add a new user, the following appears:

New User

General Settings

Email*


Contact Name*

Contact Phone

Company Name

Country*

SSO

Password*  **Generate**

Access Profile*
None

Save Changes

3. Under 'General Settings', in the 'Email' field, enter the user's email address.
4. In the 'Contact Name' field, enter the name of the user.
5. In the 'Contact Phone' field, enter the user's phone number.
6. In the 'Company Name' field, enter the name of the user's organization name.
7. From the 'Country' drop-down list, select the location of the organization.
8. If you are defining an SSO user with Azure AD (as configured in the system setting > AD sync), toggle the SSO button.
9. In the 'Password' field, click the **Generate** button to auto-generate a password.
10. From the 'Access Profile' drop-down list, select a profile to assign the user. Profiles are defined in [Create a profile](#).



This is mandatory 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.

Editing Users

You can edit user details to change their access profile and enable or disable SSO.

➤ To edit a user:

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

Users List

User Details		+ Add New	⚙ Actions												
Show 100 entries Search <input type="text"/>	<table border="1"> <thead> <tr> <th>Email</th> <th>Access Profile</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> eriel.smith@gmail.com</td> <td>Analytic Users</td> </tr> <tr> <td><input type="checkbox"/> danielle.blander@audiocodes.com</td> <td>Tenant Admin</td> </tr> <tr> <td><input type="checkbox"/> danielle.smith@gmail.com</td> <td>Tenant Admin</td> </tr> <tr> <td><input type="checkbox"/> GeorgeWhite@audiocodes.com</td> <td>Synced Access Profile</td> </tr> <tr> <td><input type="checkbox"/> mike.jackson@email.com</td> <td>Supervisor</td> </tr> </tbody> </table>	Email	Access Profile	<input type="checkbox"/> eriel.smith@gmail.com	Analytic Users	<input type="checkbox"/> danielle.blander@audiocodes.com	Tenant Admin	<input type="checkbox"/> danielle.smith@gmail.com	Tenant Admin	<input type="checkbox"/> GeorgeWhite@audiocodes.com	Synced Access Profile	<input type="checkbox"/> mike.jackson@email.com	Supervisor		
Email	Access Profile														
<input type="checkbox"/> eriel.smith@gmail.com	Analytic Users														
<input type="checkbox"/> danielle.blander@audiocodes.com	Tenant Admin														
<input type="checkbox"/> danielle.smith@gmail.com	Tenant Admin														
<input type="checkbox"/> GeorgeWhite@audiocodes.com	Synced Access Profile														
<input type="checkbox"/> mike.jackson@email.com	Supervisor														
Showing 1 to 5 of 5 entries		First Previous 1 Next Last													

2. Select the user that you want to edit.

Users List

User Details		+ Add New	⚙ Actions												
Show 100 entries Search <input type="text"/>	<table border="1"> <thead> <tr> <th>Email</th> <th>Access Profile</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> eriel.smith@gmail.com</td> <td>Analytic Users</td> </tr> <tr> <td><input type="checkbox"/> danielle.blander@audiocodes.com</td> <td>Tenant Admin</td> </tr> <tr> <td><input type="checkbox"/> danielle.smith@gmail.com</td> <td>Tenant Admin</td> </tr> <tr> <td><input type="checkbox"/> GeorgeWhite@audiocodes.com</td> <td>Synced Access Profile</td> </tr> <tr> <td><input type="checkbox"/> mike.jackson@email.com</td> <td>Supervisor</td> </tr> </tbody> </table>	Email	Access Profile	<input checked="" type="checkbox"/> eriel.smith@gmail.com	Analytic Users	<input type="checkbox"/> danielle.blander@audiocodes.com	Tenant Admin	<input type="checkbox"/> danielle.smith@gmail.com	Tenant Admin	<input type="checkbox"/> GeorgeWhite@audiocodes.com	Synced Access Profile	<input type="checkbox"/> mike.jackson@email.com	Supervisor		Edit User Delete User
Email	Access Profile														
<input checked="" type="checkbox"/> eriel.smith@gmail.com	Analytic Users														
<input type="checkbox"/> danielle.blander@audiocodes.com	Tenant Admin														
<input type="checkbox"/> danielle.smith@gmail.com	Tenant Admin														
<input type="checkbox"/> GeorgeWhite@audiocodes.com	Synced Access Profile														
<input type="checkbox"/> mike.jackson@email.com	Supervisor														
Showing 1 to 5 of 5 entries		First Previous 1 Next Last													

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

Edit User

General Settings

Email*
ariel.smith@gmail.com

Contact Name*
Ariel Smith

Contact Phone
039764277

Company Name

Country*
Israel

SSO

Access Profile
Analytic Users

Save Changes

4. Edit the fields you want to change.
5. Click **Save Changes**.

Deleting Users

You can delete users from the Users List.

➤ To delete a user:

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

Users List

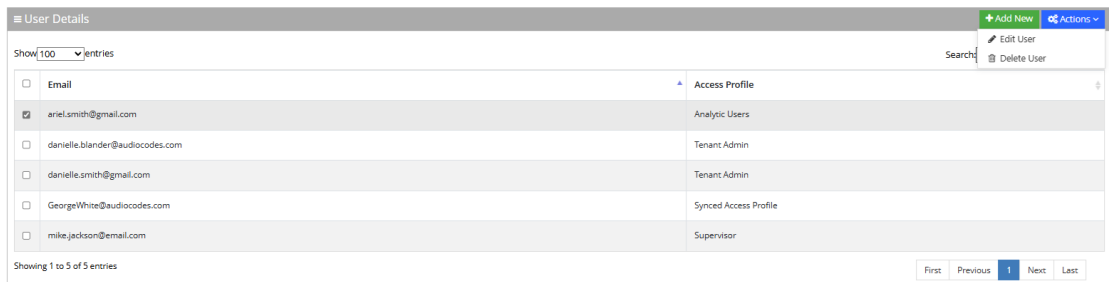
User Details		+ Add New	⚙ Actions
Show 100 entries		Search	
<input type="checkbox"/>	Email	Access Profile	
<input type="checkbox"/>	ariel.smith@gmail.com	Analytic Users	
<input type="checkbox"/>	danielle.blander@audiocodes.com	Tenant Admin	
<input type="checkbox"/>	danielle.smith@gmail.com	Tenant Admin	
<input type="checkbox"/>	GeorgeWhite@audiocodes.com	Synced Access Profile	
<input type="checkbox"/>	mike.jackson@email.com	Supervisor	

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

2. Select the user(s) that you want to delete.

Users List



The screenshot shows a 'Users List' interface. At the top, there is a 'User Details' header with a search bar and an 'Actions' dropdown menu containing 'Add New', 'Edit User', and 'Delete User'. Below the header, there is a table with columns for 'Email' and 'Access Profile'. The table contains five rows of user data. The first row is selected, and its 'Access Profile' is 'Analytic Users'. The other rows have 'Access Profiles' of 'Tenant Admin', 'Tenant Admin', 'Synced Access Profile', and 'Supervisor'. At the bottom of the table, there is a pagination control showing 'Showing 1 to 5 of 5 entries' and buttons for 'First', 'Previous', '1', 'Next', and 'Last'.

Email	Access Profile
<input checked="" type="checkbox"/> ariel.smith@gmail.com	Analytic Users
<input type="checkbox"/> danielle.blander@audiocodes.com	Tenant Admin
<input type="checkbox"/> danielle.smith@gmail.com	Tenant Admin
<input type="checkbox"/> GeorgeWhite@audiocodes.com	Synced Access Profile
<input type="checkbox"/> mike.jackson@email.com	Supervisor

3. From the 'Actions' drop-down menu, choose **Delete User**.
4. Click **OK**.

Configuring Profiles

This section covers the following access profile management actions:

- Add new custom profiles
- Edit:
 - Custom profiles can be fully edited.
 - Default profiles (Tenant Admin and Analytic Users) can only have their AD Security Groups configured.
- Clone custom profiles. You can clone custom profiles you created to quickly create new profiles with similar settings. You cannot clone the default predefined profiles (Tenant Admin and Analytic Users).
- Delete custom profiles



The core permissions of the default Tenant Admin and Analytic Users profiles are system-protected and cannot be edited, cloned, or deleted.

Creating Profiles

The Access Profile list comes with two built-in non-editable profiles (except AD Security Groups). 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.

➤ To create a profile:

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

Access Profile

Profile Name	Description	Security Group Names	# of Assigned Users
Tenant Admin	Default System Profile		2
Analytic Users	Default System Profile		1

The Access Profile page is described below:

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

Add Access Profile

Profile Name*

Description

AD Security Groups

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

Save Changes

3. In the 'Profile Name' field, enter a name for the profile.
4. (Optional) In the Description field, enter a description of the profile you are creating.
5. In the 'AD Security Groups' field, enter the Azure Directory Security group name/s. This will automatically assign 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.

6. Under 'Access Areas', selectively check specific sections/pages to allow users with this Profile viewing and/or editing those sections/pages.

Editing Profiles

Customize user access by editing custom profiles. While predefined profiles (Tenant Admin and Analytic Users) are locked and cannot be modified, you can configure their AD Security Groups.

➤ To edit a profile:

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

Access Profile

Profile Name	Description	Security Group Names	# of Assigned Users
Tenant Admin	Default System Profile		2
Analytic Users	Default System Profile		1

Showing 1 to 2 of 2 entries

2. Select the profile that you want to edit.

Access Profile

Profile Name	Description	Security Group Names	# of Assigned Users
Managers	Manager access		1
IT Access	IT access to entire org		0
<input checked="" type="checkbox"/> Technical Writer	Assigned to TWs		1
Tenant Admin	Default System Profile		1
Analytic Users	Default System Profile		1

Showing 1 to 5 of 5 entries

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

Edit Access Profile

Profile Name*
Technical Writer

Description
Assigned to TWs

AD Security Groups

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

Save Changes

- Edit the fields you want to change.



Default profiles (Tenant Admin and Analytic Users) are limited to AD Security Group configuration only.

- Click **Save Changes**.

Cloning Profiles

Clone custom profiles you created to quickly create new profiles with similar settings. You cannot clone the default predefined profiles (Tenant Admin and Analytic Users).

➤ To clone a profile:

- Open the User List page (**Configuration > Access Management > Access Profile**); the following appears:

Access Profile

<input type="checkbox"/>	Profile Name	Description	Security Group Names	# of Assigned Users
<input type="checkbox"/>	Managers	Manager access		1
<input type="checkbox"/>	IT Access	IT access to entire org		0
<input type="checkbox"/>	Technical Writer	Assigned to TWs		1
<input type="checkbox"/>	Tenant Admin	Default System Profile		1
<input type="checkbox"/>	Analytic Users	Default System Profile		1

Showing 1 to 5 of 5 entries

2. Select the custom profile that you want to clone.

Access Profile

<input type="checkbox"/>	Profile Name	Description	Security Group Names	# of Assigned Users
<input checked="" type="checkbox"/>	Managers	Manager access		1
<input type="checkbox"/>	IT Access	IT access to entire org		0
<input type="checkbox"/>	Technical Writer	Assigned to TWs		1
<input type="checkbox"/>	Tenant Admin	Default System Profile		1
<input type="checkbox"/>	Analytic Users	Default System Profile		1

Showing 1 to 5 of 5 entries

3. From the 'Actions' drop-down list, choose **Clone Access Profile**. The following appears:

Clone Access Profile

Profile Name*
Managers - copy

Description
Manager access

AD Security Groups

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

[Save Changes](#)

4. You can modify the profile or proceed without modification.
5. Click **Save Changes**.

Deleting Profiles

Delete custom profiles you created. You cannot delete the default predefined profiles (Tenant Admin and Analytic Users).

➤ To delete a profile:

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

Access Profile

<input type="checkbox"/>	Profile Name	Description	Security Group Names	# of Assigned Users
<input type="checkbox"/>	Managers	Manager access		1
<input type="checkbox"/>	IT Access	IT access to entire org		0
<input type="checkbox"/>	Technical Writer	Assigned to TWs		1
<input type="checkbox"/>	Tenant Admin	Default System Profile		1
<input type="checkbox"/>	Analytic Users	Default System Profile		1

2. Select the custom profile that you want to delete.

Access Profile

<input checked="" type="checkbox"/>	Profile Name	Description	Security Group Names	# of Assigned Users
<input checked="" type="checkbox"/>	Managers	Manager access		1
<input type="checkbox"/>	IT Access	IT access to entire org		0
<input type="checkbox"/>	Technical Writer	Assigned to TWs		1
<input type="checkbox"/>	Tenant Admin	Default System Profile		1
<input type="checkbox"/>	Analytic Users	Default System Profile		1

3. From the 'Actions' drop-down list, choose **Delete Access Profile**.
4. Click **OK**.

Recording Links

The Recording Links section in Access Management controls who can access call-recording links. In the Worker Call Report, calls that include recordings display a shareable recording link. By default, only Tenant Admins and Tenant Analysts can open these links.

This section describes how to grant additional users or groups access to recording links. Each recorded call is associated with a Recording Profile. When you grant access to a user or an Azure AD security group for a specific Recording Profile, they can view all recordings associated with that profile.

Assigning Access to Recording Links

- **To assign access to a recording link:**

1. Open the Recording Links page (Configuration > Access Management > Recording Links).

<input type="checkbox"/>	RECORDING PROFILE	STATUS	GROUPS	OTHER USERS
<input type="checkbox"/>	Help Desk Recording Profile	Active	0	1
<input type="checkbox"/>	Sales Recording Profile	Active	0	1

The Recording Links page is described below:

- **Recording Profile:** Displays the Recording Profile name.
- **Status:** Displays the Recording Profile status.

- **Groups:** Displays the number of Azure AD Security Groups with access to recording links for this profile.
 - **Other Users:** Displays the number of individual users (not part of Azure AD groups) with access to recording links for this profile.
2. Select the Recording Profile that you want to add access to groups/users to access the Recording Profile's recording links.

	RECORDING PROFILE	STATUS	GROUPS	OTHER USERS	Actions
<input checked="" type="checkbox"/>	Help Desk Recording Profile	Active	0	1	▼ Edit
<input type="checkbox"/>	Sales Recording Profile	Active	0	1	

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

Edit Recording Link

Recording Profile
Help Desk Recording Profile

AD Security Groups
Help Desk ✕

Selected Users
▼

[Save Changes](#)

4. In the 'AD Security Groups' field, enter the Azure Directory Security group name/s. All SSO users within the selected groups will be granted access to the recordings associated with this Recording Profile.



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

5. In the 'Selected users' field, choose individual users from the drop-down list to grant them access to the recordings associated with this Recording Profile.

Dialplan Settings

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

Configuring Outgoing Rules


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

➤ To create a new outgoing rule:

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



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

3. Under the General Details group, in the 'Rule Name' field, enter the name of the new manipulation rule to be added.
4. Under the Dialed Number Condition group, in the "The number is between" field, enter the number of digits (minimum and maximum) required for the manipulation.
5. Click the Green plus  button to enter a prefix.
6. Under the Dialed Number Manipulation group:

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

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

New Outgoing Rule

≡ New Outgoing Rule - Step 2 of 2

1 Rule Details 2 Confirm

Confirm Information

General Details

Rule Name: gg

Dialed Number Condition

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

Dialed Number Manipulation

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

⏪ Back Save Information ⏩

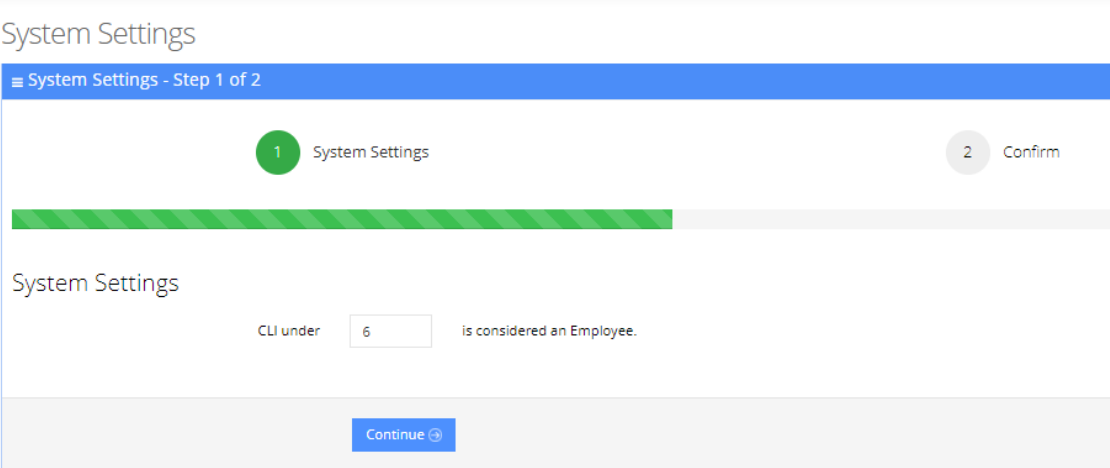
8. Click **Save Information**.

Configuring Incoming Rules

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

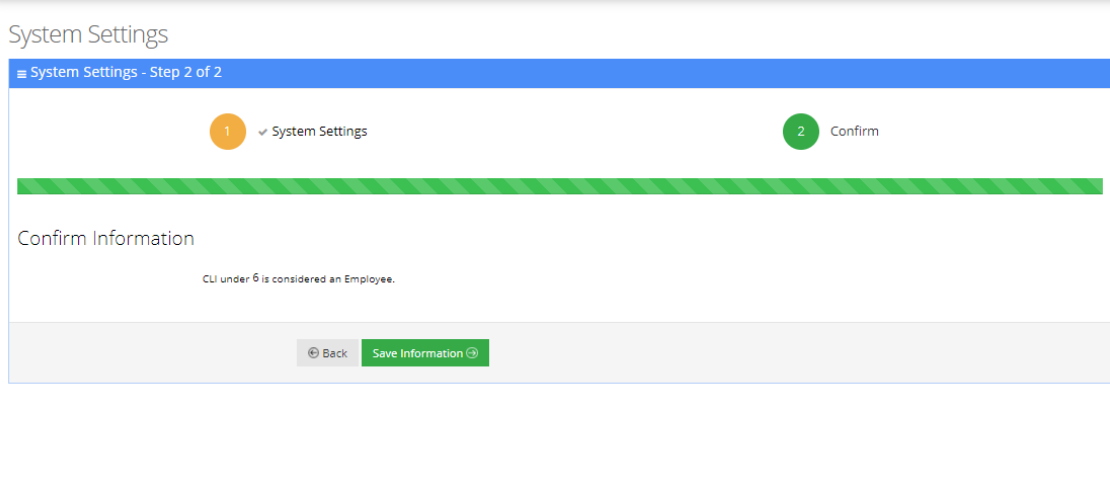
➤ **To configure a new incoming rule:**

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



The screenshot shows the 'System Settings' configuration page, Step 1 of 2. At the top, a blue header bar reads 'System Settings - Step 1 of 2'. Below this, a progress bar indicates the current step: a green circle with the number '1' is positioned above 'System Settings', and a grey circle with the number '2' is positioned above 'Confirm'. A green diagonal-striped bar highlights the 'System Settings' section. Below this bar, the text 'System Settings' is followed by a form field labeled 'CLI under' containing the number '6', and the text 'is considered an Employee.' Below the form field is a blue button labeled 'Continue' with a right-pointing arrow.

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**.



The screenshot shows the 'System Settings' configuration page, Step 2 of 2. At the top, a blue header bar reads 'System Settings - Step 2 of 2'. Below this, a progress bar indicates the current step: an orange circle with the number '1' is positioned above 'System Settings' (which has a small downward arrow), and a green circle with the number '2' is positioned above 'Confirm'. A green diagonal-striped bar highlights the 'Confirm Information' section. Below this bar, the text 'Confirm Information' is followed by the text 'CLI under 6 is considered an Employee.' Below this text are two buttons: a grey button labeled 'Back' with a left-pointing arrow, and a green button labeled 'Save Information' with a right-pointing arrow.

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 Report](#)
- [Overall Report](#)
- [Call Date Report](#)
- [Drilldown Report](#)
- [Real-time Dashboard](#)

Report Scheduler

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



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

Adding a Report Scheduler

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

- **To add a new Report Scheduler:**
 1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

Search Action + New Scheduled

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

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

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

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

NEW SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name

Report export method ▼

Start date & time 🗓

End date & time 🗓

Export Frequency

At

Daily ▼

Time

🕒

Export Format ▼

Email Subject

Recipients

Report Details

Reports ▼

Cancel
Schedule

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

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

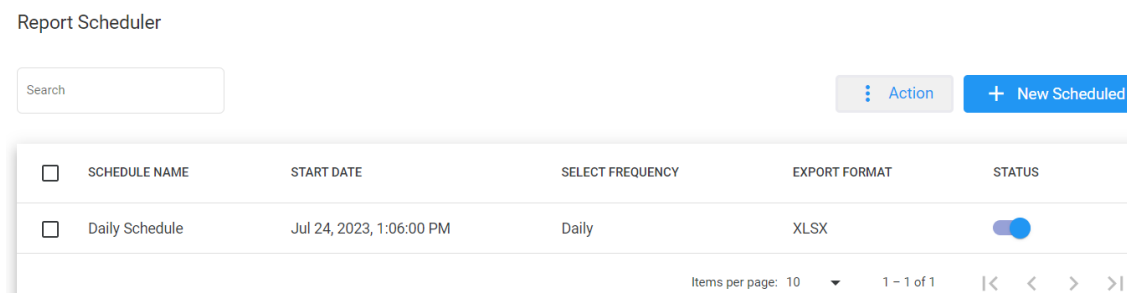
6. Click **Save Changes**.

Editing a Report Scheduler

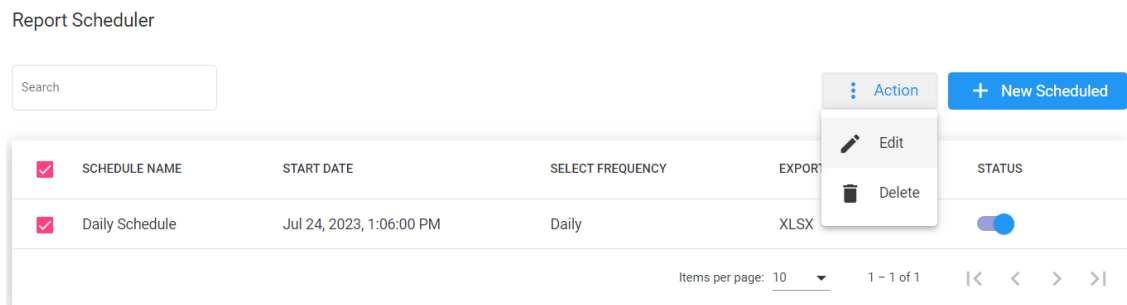
The procedure below describes how to edit a Report Scheduler.

➤ **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:

EDIT SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name
Daily Schedule

Report export method
Email

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

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

Export Frequency
At
Daily

Time
01:41 PM

Export Format
XLSX

Email Subject
Overall - Daily

Recipients
admin@voca.audiocodes.com

Report Details
Reports
Overall

Queue Name

Call Source
Exact

Call Destination
Exact

Wait Time (Sec.)
From To

Status
Any

Timezone Display Mode
Tenant Time zone

Cancel Schedule

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

Delete a Report Scheduler

The procedure below describes how to delete a Report Scheduler.

➤ **To delete a Report Scheduler:**

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

Report Scheduler

Action + New Scheduled

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

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

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

Report Scheduler

Search Action + New Scheduled

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

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

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

Journey Manager Report

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

➤ To generate the Journey Manager report:

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

Interaction Center Reports

≡ Journey Manager

▼ Filter Options

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

- 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 281.
 - **Timezone Display Mode:** Displays this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Displays the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Displays the information in this report based on the time zone configured under the **Telephony Setting** settings.
 - ◆ **Local time zone (Web):** Displays the information in this report based on the browser local time zone.
3. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.
 4. The following is a description of the report fields.

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

Call Queue Reports

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

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

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

Overall Report

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

➤ **To generate an Overall report:**

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

Call Queue Reports

≡ Call Queue Overall

▼ Filter Options

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

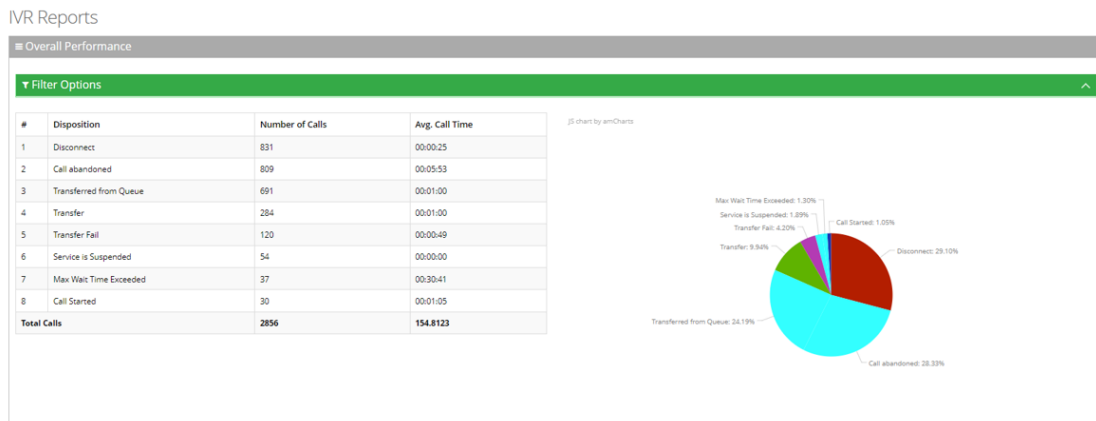
2. Select the appropriate filter fields to generate your report:

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

IVR Reports

Call Date

Filter Options

Date From:

Date To:

Call Source: Begins wit

Call Routed: Begins wit

Call Duration: to

Call Disposition: Any

DNIS: Any

Timezone Display Mode: Tenant Time zone

2. Select the appropriate filter fields:

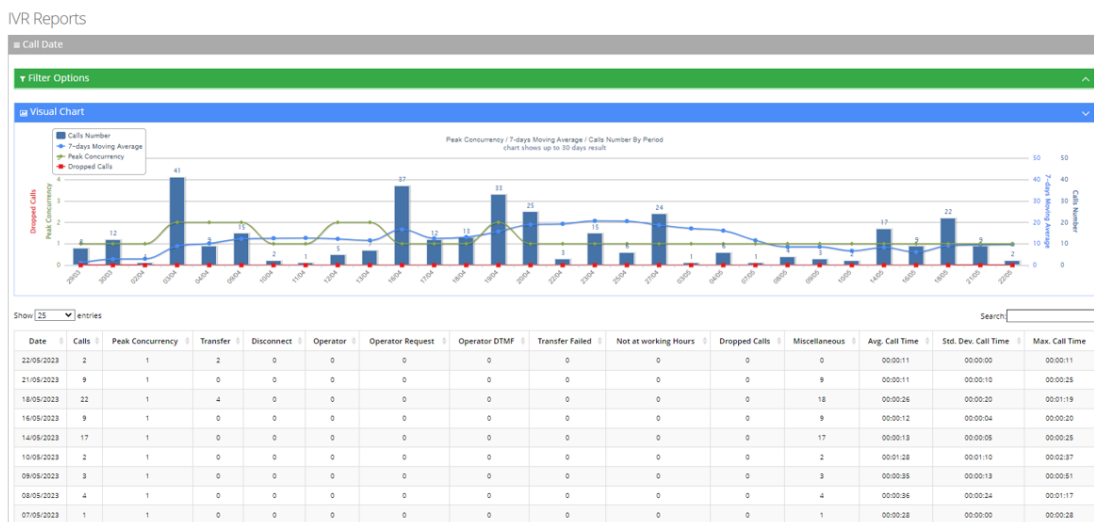
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Call Source:** Defines information that is related to a specific source number.
- **Call Routed:** Defines information that is related to a call that was routed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



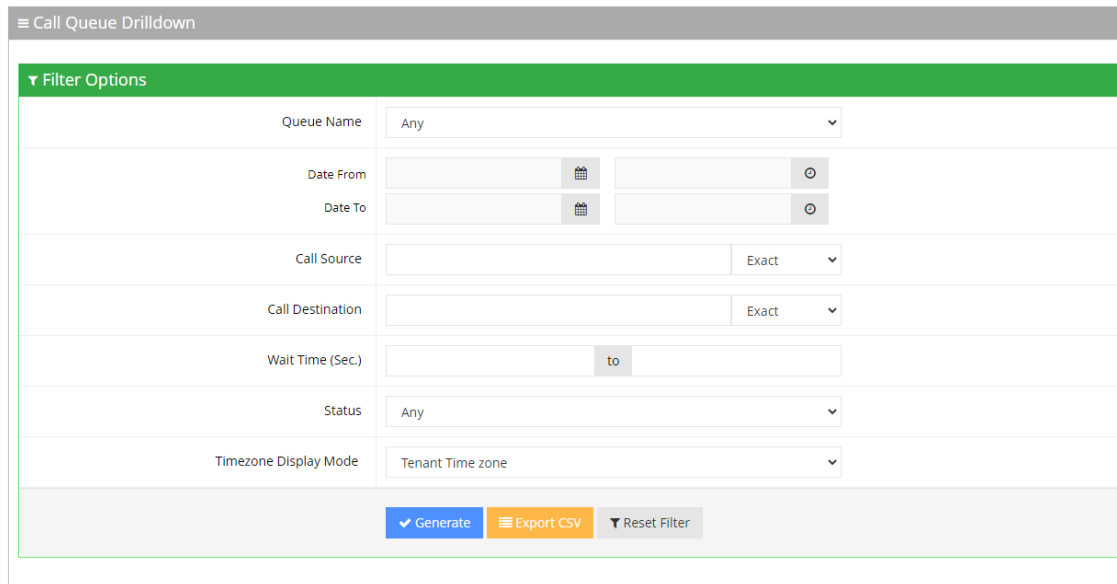
Drilldown Report

The procedure below describes how to generate an Drilldown report.

➤ **To generate a Drilldown report:**

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

Call Queue Reports



Call Queue Drilldown

Filter Options

Queue Name: Any

Date From: [Date Picker] Date To: [Date Picker]

Call Source: [Text Input] Exact

Call Destination: [Text Input] Exact

Wait Time (Sec.): [Text Input] to [Text Input]

Status: Any

Timezone Display Mode: Tenant Time zone

Generate Export CSV Reset Filter

2. Select the appropriate filter fields:

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

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

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

Call Queue Reports

Call Queue Drilldown

Filter Summary

Filter Options

Show 25 entries

Search

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

Showing 1 to 3 of 3 entries

Callback Detail Report

The Callback Detailed Report provides an overview of all callbacks in the system, including whether they were resolved or unresolved. It also shows the number of attempts made and the specific attempt in which the callback was successfully handled.

➤ To generate an Callback Detail Report:

1. Open the Callback Detail Report page (**Reports > Call Queue Reports > Callback Detail Report**).

Call Queue Reports

☰
Callback Detail Report

▼ Filter Options
▼

Date From	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
Date To	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
Resolved	<input style="width: 100%;" type="text" value="All"/> ▼	
Queue Name	<input style="width: 100%;" type="text" value="Any"/> x	
Contact Name	<input style="width: 100%;" type="text" value="Any"/> ▼	
Time Zone Display Mode	<input style="width: 100%;" type="text" value="Tenant Time Zone"/> ▼	

▼ Generate
☰ Export CSV
▼ Reset Filter

2. Select the appropriate filter fields to generate your report:
 - **Date From:** Defines this report for a specific time range.
 - **Date To:** Defines this report for a specific time range.
 - **Resolved:** Number of times callers engaged with a agent via Callback
 - **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
 - **Contact Name:** Defines information that is related to a specific contact.
 - **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
Queue Name	Defines the queue to which the call is queued.
Call Skills	The skill through which the Caller was delivered to the agent.

Report Column	Description
	Defines the skills that are associated with the queue to which the call is routed.
Source	The phone number that the contact called from.
Destination	The phone number that the contact dialed to call you.
Request Time	Time of Callback Request
Resolved	Yes – Caller engaged with an agent No – Caller didn't engage with an agent
Contact Name	Contact name that accepts the callback call. If Callback isn't resolved – enter "N/A"
Attempts	The total number of callback attempts, including the one that succeeded.
Attempts Time	Displayed when user use "+" button to extend the record.
Attempt #1	YYYY/MM/DD HH/MM/SS
Attempt #2	YYYY/MM/DD HH/MM/SS (If there was no second retry, fill with "N/A")
Attempt #3	YYYY/MM/DD HH/MM/SS (If there was no third retry, fill with "N/A")

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

Callback Summary Report

The Callback Summary Report provides an overview of all callback requests, showing how many were resolved or unresolved. It also includes the resolution rate and the average number of attempts made to complete a callback.

➤ To generate a Callback Summary Report:

1. Open the Callback Summary Report page (**Reports > Call Queue Reports > Callback Summary Report**); the following appears:

Call Queue Reports

☰
Callback Summary Report

▼ Filter Options
▼

Interval Use Interval

Date From

Date To

Queue Name

Time Zone Display Mode

✔ Generate
☰ Export CSV
▼ Reset Filter

2. Select the appropriate filter fields to generate your report:
 - **Date From:** Defines this report for a specific time range.
 - **Date To:** Defines this report for a specific time range.
 - **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 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
Queue Name	Indicates the Queue name.
Requested	Number of times callers requested a Callback
Resolved	Number of times callers engaged with a agent via Callback
Unresolved	Number of times callers didn't engaged with a agent after request-

Report Column	Description
	ing a callback
% Resolved	Resolved / Requested
Avg. Attempts	The total number of callback attempts, including the one that succeeded.

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

Real-Time Dashboard

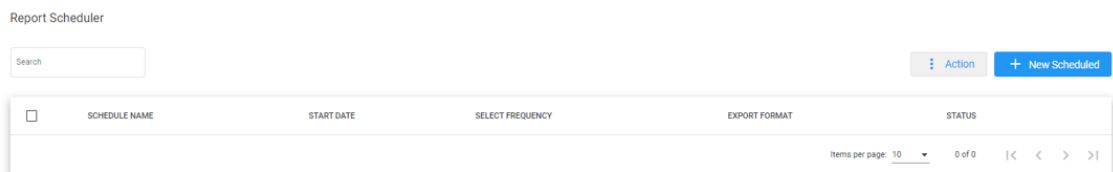
The Real-Time Dashboard provides an easy way to monitor the queue activity and to get real-time insights on queues.

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:

New Dashboard

Name*

Description

Queue Name*

Pending Calls ● 0 ● 1

Calls Abandoned ● 0 ● 1

Overflowed Calls (Max Time) ● 0 ● 1

Overflowed Calls (Max Limit) ● 0 ● 1

Queue Members ● 0 ● 1

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

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

+

Save Changes

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.
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.

Field	Description
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.



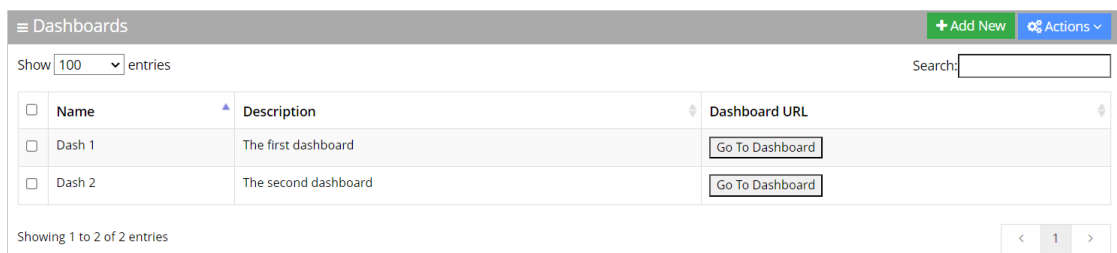
- The graphic view is generated automatically when up to two queues are configured. If more than two queues are configured, the dashboard displays a table view. The dashboard's data is reset every 24 hours at 00:00.

Editing a Dashboard

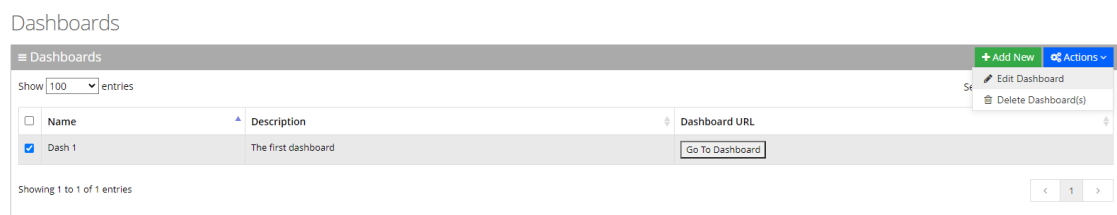
The procedure below describes how to edit a dashboard.

➤ **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:

Edit Dashboard

Name*

Description

Queue Name*

Pending Calls

Calls Abandoned

Overflowed Calls (Max Time)

Overflowed Calls (Max Limit)

Queue Members

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

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

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:

<input type="checkbox"/>	Name	Description	Dashboard URL
<input type="checkbox"/>	Dash 1	The first dashboard	<input type="button" value="Go To Dashboard"/>
<input type="checkbox"/>	Dash 2	The second dashboard	<input type="button" value="Go To Dashboard"/>

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

<input type="checkbox"/>	Name	Description	Dashboard URL
<input type="checkbox"/>	Dash 1	The first dashboard	<input type="button" value="Go To Dashboard"/>
<input checked="" type="checkbox"/>	Dash 2	The second dashboard	<input type="button" value="Go To Dashboard"/>

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

Dashboards			+ Add New	⚙️ Actions
Show 100 entries			Sc	<ul style="list-style-type: none"> Edit Dashboard Delete Dashboard(s)
<input type="checkbox"/>	Name	Description	Dashboard URL	
<input type="checkbox"/>	Dash 1	The first dashboard	Go To Dashboard	
<input checked="" type="checkbox"/>	Dash 2	The second dashboard	Go To Dashboard	
Showing 1 to 2 of 2 entries			<input type="button" value="1"/>	

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

Interaction Center Reports

You can generate the following Interaction Center historical reports:

- [Report Scheduler](#) below
- [Voice Reports](#)
- [Email Reports](#)
- [Chat Reports](#)
- [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:**
 - Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:

Report Scheduler

Search Action + New Scheduled

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

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

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

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

NEW SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name

Report export method ▼

Start date & time End date & time

Export Frequency

At

Daily ▼

Time

--:-- -- ⊙

Export Format ▼

Email Subject

Recipients

Report Details

Reports ▼

Cancel
Schedule

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

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

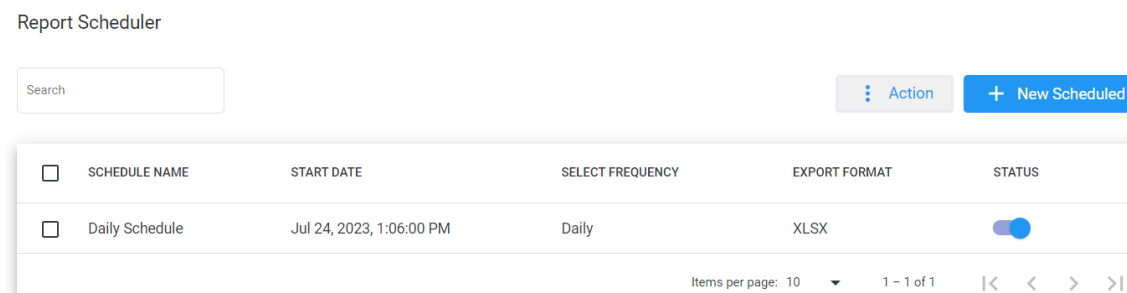
6. Click **Save Changes**.

Editing a Report Scheduler

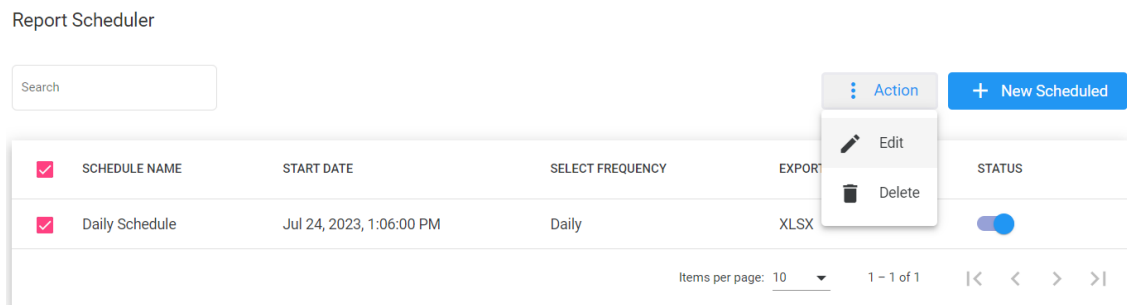
The procedure below describes how to edit a Report Scheduler.

➤ **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:

EDIT SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name
Daily Schedule

Report export method
Email

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

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

Export Frequency
At
Daily

Time
01:41 PM

Export Format
XLSX

Email Subject
Overall - Daily

Recipients
admin@voca.audiocodes.com

Report Details
Reports
Overall

Queue Name

Call Source
Exact

Call Destination
Exact

Wait Time (Sec.)
From: To:

Status
Any

Timezone Display Mode
Tenant Time zone

Cancel Schedule

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

Deleting a Report Scheduler

The procedure below describes how to delete a Report Scheduler.

➤ **To delete a Report Scheduler:**

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

Report Scheduler

Action
+ New Scheduled

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

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

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

Report Scheduler

Search

Action
+ New Scheduled

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

Edit
 Delete

Items per page: 10 1 - 1 of 1

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

Interaction Center Reports - Voice

You can generate the following Voice Interaction Center historical reports:

- Journey Manager
- Worker Activity Report
- Queue Activity Report
- Abandoned Call Detail Activity Report
- Worker Call Report
- Worker State Summary Report
- Worker Login-Logout Report
- Worker State Detail Report
- Callback Detail Report
- Callback Summary Report

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:

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

Interaction Center Reports

The screenshot shows the 'Filter Options' section in the Journey Manager interface. It contains the following fields and controls:

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

At the bottom of the filter options, there are two buttons: a blue 'Generate' button and a grey 'Reset Filter' button.

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 281.
- **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

The screenshot shows the 'Journey Manager' interface with a 'Filter Options' bar and a table of call records. The table has 11 columns: Date, Timezone, Source, Destination, Duration, DNIS Name, Queue Name, Queue Time, Talk Time, Disposition, and Routed To. There are 11 rows of data, each with a plus icon in the first column. The 'Routed To' column contains phone numbers like +97239764820 and +97239.

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 Worker Activity Report page (**Reports > Interaction Center Reports > Voice Reports > Worker Activity Report**); the following appears:

Interaction Center Reports

Worker Activity Report

Filter Options

Interval Use Interval

Date From

Date To

Worker

Worker Group

Extension Exact

Timezone Display Mode

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

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

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

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

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

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

Interaction Center Reports

Worker Activity Report

Filter Summary

Filter Options

Show 25 entries

Search:

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

Queue Activity Report

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

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

➤ **To generate a queue activity report:**

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

Interaction Center Reports

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

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

The following is a description of the report fields.

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

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

Interaction Center Reports

Abandoned Call Report

Filter Summary

Filter Options

Show 25 entries Search

#	Call Start Time	Called Number	Call ANI	Call Routed Queue	Call Abandonment Time	Time to Abandon
1	2022-02-28 11:56:31	+97281234567	+97227654321	Support1	2022-02-28 12:00:05	00:03:34
2	2022-02-27 14:48:56	+97281234567	+97227654321	Support1	2022-02-27 14:49:54	00:00:58

Worker Call Report

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

➤ To generate an Worker Call Report:

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

Interaction Center Reports

The screenshot shows the 'Worker Call Report' filter options interface. It features a green header with a dropdown arrow. Below the header, there are several filter fields:

- Date From** and **Date To**: Each has a text input field, a calendar icon, and a clear icon.
- Worker**: A dropdown menu with 'Any' selected.
- Worker Extension**: A text input field and a dropdown menu with 'Exact' selected.
- Queue Name**: A dropdown menu with 'Any' selected.
- Called Number**: A text input field and a dropdown menu with 'Exact' selected.
- Call ANI**: A text input field and a dropdown menu with 'Exact' selected.
- Call Type**: A dropdown menu with 'Any' selected.
- Time Zone Display Mode**: A dropdown menu with 'Tenant Time Zone' selected.

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

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

- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.
- **Workers:** Defines information that is related to a specific worker.
- **Workers Extension:** Defines information that is related to a specific extension.
- **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
- **Called Number:** Defines information that is related to a specific destination number.
- **Call ANI:** Defines information that is related to a specific source number.
- **Call Type:** Defines information that is related to a specific call type:
 - ◆ **Any:** Defines the information that is related to inbound and outbound calls.
 - ◆ **Inbound:** Defines the information that is related to all the inbound calls.
 - ◆ **Outbound:** Defines the information that is related to all the outbound calls.
- **Timezone Display Mode:** Display this report in different time zone. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Display the information in this report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Display the information in this report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Display the information in this report on the browser local time zone.

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

Report Column	Description
Worker Name	Defines the name of the worker.
Worker Extension	Defines the extension of the worker.
Call Start Time	Defines the date and time the call started.
Call End Time	Defines the date and time the call ended.
Call Type	Defines whether the call was inbound or outbound.
Answering Device	Defines whether the call was answered via the Voca Worker App or via Microsoft Teams.
Call Duration	Defines the duration of the call.
Status	Defines whether the call was 'Accepted' or 'Declined' by the worker.
Called Number	Defines the telephone number that the caller dialed.
Call ANI	Defines the originator's telephone number (ANI = Automatic Number Identification).
Call Routed Queue	Defines the queue to which the call is queued.
Call Skills	Defines the skills that are associated with the queue to which the call is routed.
Participants	Defines the number of additional participants added to the call.
Talk Time	Defines how long the worker was in the talking state.
Hold Time	Defines how long the call was put on hold.
Consult Time	Defines how long the Worker connected with supervisors or others for consultation.
Wrap-up Time	Defines how long the Worker was in Wrap-up state.
Wrap-up State	Defines the selected Wrap-up state.
Recording	Defines whether the call was recorded or not.
Sentiment	Defines the emotional tone of the call.

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

Interaction Center Reports

Worker Call Report

Filter Summary
Queue Name: Any | Worker Name: Any |

Filter Options

Show 25 entries

	Call End Time	Call Type	Answering Device	Call Duration	Status	Called Number	Call ANI	Call Routed Queue	Call Skills	Talk Time	Hold Time	Consult Time	Wrap-up Time	Wrap-up State	Recording	Sentiment
6:19	2025-11-27 11:26:30	Outbound	Voca Worker App	00:00:11	Accepted	1800111000	N/A	N/A	N/A	00:00:05	00:00:00	00:00:00	00:00:00	N/A		
5:35	2025-11-27 11:25:46	Outbound	Voca Worker App	00:00:11	Accepted	1800111000	N/A	N/A	N/A	00:00:06	00:00:00	00:00:00	00:00:00	N/A		
4:03	2025-11-27 11:24:14	Outbound	Voca Worker App	00:00:11	Accepted	1800111000+150020	N/A	skill	N/A	00:00:06	00:00:00	00:00:00	00:00:00	N/A		
3:20	2025-11-27 11:23:32	Inbound	Voca Worker App	00:00:12	Accepted	+150020	1800111000	skill	Sales	00:00:11	00:00:00	00:00:00	00:00:00	No Wrap up		
1:53	2025-11-27 11:22:03	Outbound	Voca Worker App	00:00:10	Accepted	1800111000	N/A	N/A	N/A	00:00:05	00:00:00	00:00:00	00:00:00	N/A		

5. Expand call record to view call recording details.

- For any recorded call, you can:
 - ◆ **Listen** to the call recording using playback controls that allow you to forward or rewind by 10 seconds for easy navigation.
 - ◆ **Download the recording.** From the **Save Call** drop-down, select **Recording** and click **Save**.
 - ◆ **Share** call recording link by clicking the **Copy link** icon, located to the right of the playback controls. By default, only Tenant Admins and Tenant Analysts can access these links. To grant additional users or groups access to recording link, see the [Recording Links](#) on page 188 configuration under the [Access Management](#) on page 177 section.
- If the call used the Agent Insights Add-on, you can also view:
 - ◆ **Transcript**
 - ◆ **Summary**
 - ◆ **Sentiment** - the emotional tone of the call, which can be:
 - ◆ **Positive** – The conversation was constructive and friendly.
 - ◆ **Negative** – The conversation involved frustration or conflict.
 - ◆ **Neutral** – The conversation was matter-of-fact with no strong emotions.
 - ◆ **Combined sentiments (e.g., Neutral–Negative)** – The call’s tone shifted during the conversation. For example, the call may have started professionally but became tense as the agent or customer grew frustrated.
- **Additional Notes** - You can view agent’s notes added at the end of the call.

The screenshot displays a call record for a worker named Yakov Agent. At the top, a table lists call details: Worker Name (Yakov Agent), Extension (+97233821063), Call Start Time (2026-04-28 11:46:15), Call End Time (2026-04-28 11:47:37), Call Type (Inbound), Answering Device (Voca Worker App), Call Duration (00:01:22), Status (Accepted), Called Number (+16072467134), Call ANI (+13059008267), Call Routed Queue (Hospital Main), Call Skills (Hospital Main), and Participants (0). Below the table is a call duration bar from 0:00 to 0:37. A 'Save Call' dropdown is set to 'none'. The transcript shows a conversation about a billing dispute. The summary includes 'Call Highlights' (customer followed up on a \$247 charge), 'Executive Summary' (agent confirmed billing team work), and 'Action Items Completed During the Call' (Yakov Agent verified ticket status).

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 Worker Login-Logout Report page (**Reports > Interaction Center Reports > Voice Reports > Worker Login-Logout Report**); the following appears:

Interaction Center Reports

The screenshot shows the 'Worker Login-Logout Report' page. It features a 'Filter Options' section with the following fields: 'Date From' and 'Date To' (both with calendar icons), 'Worker' (dropdown menu set to 'Any'), 'Worker Group' (dropdown menu set to 'Any'), and 'Timezone Display Mode' (dropdown menu set to 'Tenant Time zone'). At the bottom of the filter section are three buttons: 'Generate', 'Export CSV', and 'Reset Filter'.

2. Select the appropriate filter fields to generate your report:
 - **Date From:** Defines this report for a specific time range.
 - **Date To:** Defines this report for a specific time range.
 - **Worker:** Defines information that is related to a specific worker.

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

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

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

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

Interaction Center Reports

The screenshot shows a web interface for a report titled "Worker Login-Logout Report". It includes a "Filter Summary" section, a "Filter Options" section with a search bar, and a table displaying report data. The table has the following columns: Worker Name, Logged-in Time, Logged Out Time, Logged Out Reason, and Duration. The data rows show various login and logout events for "Worker 1" with specific timestamps and reasons like "Connection Lost" and "Worker Logout".

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

Worker State Detail Report

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

➤ To generate a Worker State Detail Report:

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

Interaction Center Reports

The screenshot shows the 'Worker State Detail Report' filter options. It includes a green header with a dropdown arrow and the text 'Filter Options'. Below this are several filter fields: 'Date From' and 'Date To' (each with a calendar icon and a clear icon), 'Worker' (a dropdown menu with 'Any' selected), 'State' (a dropdown menu with 'Any' selected), and 'Timezone Display Mode' (a dropdown menu with 'Tenant Time zone' selected). At the bottom of the filter section are three buttons: 'Generate' (blue), 'Export CSV' (orange), and 'Reset Filter' (grey).

2. Select the appropriate filter fields 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.
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.

Interaction Center Reports

The screenshot shows a web interface for a 'Worker State Detail Report'. At the top, there is a header 'Worker State Detail Report' and a green 'Filter Options' bar. Below the filter bar, there is a 'Show All entries' dropdown and a search box. The main content is a table with the following data:

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

Worker State Summary Report

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

➤ **To generate a Worker State Report:**

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

≡ Worker State Summary Report

▼ Filter Options

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

Generate
Export CSV
Reset Filter

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

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

Report Column	Description
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.

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

Interaction Center Reports

Worker State Summary Report

Filter Summary

Filter Options

Show All entries Search

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

Callback Detail Report

The Callback Detailed Report provides an overview of all callbacks in the system, including whether they were resolved or unresolved. It also shows the number of attempts made and the specific attempt in which the callback was successfully handled.

- To generate an Callback Detail Report:

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

Interaction Center Reports

Callback Detail Report

Filter Options

Date From [] []

Date To [] []

Resolved All

Queue Name Any

Worker Any

Time Zone Display Mode Tenant Time Zone

Generate Export CSV Reset Filter

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

- **Date To:** Defines this report for a specific time range.
- **Resolved:** Number of times callers engaged with a Worker via Callback
- **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
- **Worker:** Defines information that is related to a specific worker.
- **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
Queue Name	Defines the queue to which the call is queued.
Call Skills	The skill through which the Caller was delivered to the agent. Defines the skills that are associated with the queue to which the call is routed.
Source	The phone number that the contact called from.
Destination	The phone number that the contact dialed to call you.
Request Time	Time of Callback Request
Resolved	Yes – Caller engaged with an agent No – Caller didn't engage with an agent
Worker Name	Worker name that accepts the callback call. If Callback isn't resolved – enter "N/A"
Attempts	The total number of callback attempts, including the one that succeeded.
Attempts Time	Displayed when user use "+" button to extend the record.
Attempt #1	YYYY/MM/DD HH/MM/SS
Attempt #2	YYYY/MM/DD HH/MM/SS (If there was no second retry, fill with

Report Column	Description
	"N/A")
Attempt #3	YYYY/MM/DD HH/MM/SS (If there was no third retry, fill with "N/A")

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

Interaction Center Reports

☰ Callback Detail Report

Filter Summary
 Queue Name: Any | Worker Name: Any |

▼ Filter Options ^

Show entries Search:

	Queue Name	Call Skills	Source	Destination	Request Time	Resolved	Worker Name
+	Support Queue	Help Desk	+9726245536	+97233820512	2024-08-19 15:20:03	Resolved	Rachel Green
+	Support Queue	Help Desk	+9726245536	+97233820512	2024-08-19 15:20:03	Resolved	Rachel Green
+	Support Queue	Help Desk	+9726245536	+97233820512	2024-08-19 15:15:12	Unresolved	N/A

Showing 1 to 3 of 3 entries

Callback Summary Report

The Callback Summary Report provides an overview of all callback requests, showing how many were resolved or unresolved. It also includes the resolution rate and the average number of attempts made to complete a callback.

➤ **To generate a Callback Summary Report:**

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

Interaction Center Reports

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.
- **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 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
Queue Name	Indicates the Queue name.
Requested	Number of times callers requested a Callback
Resolved	Number of times callers engaged with a Worker via Callback
Unresolved	Number of times callers didn't engaged with a Worker after requesting a callback
% Resolved	Resolved / Requested
Avg. Attempts	The total number of callback attempts, including the one that succeeded.

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

Interaction Center Reports

☰ Callback Summary Report

Filter Summary

Queue Name: Any |

▼ Filter Options

Show 25 entries Search:

Queue Name	Requested	Resolved	Unresolved	% Resolved	Avg. Attempts
Support Queue	3	2	1	66.67	1.33

Showing 1 to 1 of 1 entries
First Previous 1 Next Last

Interaction Center Reports - Email

You can generate the following Email Interaction Center historical reports:

- Worker Activity Report
- Queue Activity Report
- Worker Report

Worker Activity Report

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

➤ **To generate a Worker Activity report:**

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

Interaction Center Reports

☰ Worker Activity Report

▼ Filter Options

Interval Use Interval

Date From

Date To

Worker Any ▼

Worker Group Any ▼

Time Zone Display Mode Tenant Time Zone ▼

Generate
Export CSV
Reset Filter

2. Select the appropriate filter fields:

- **Interval:** Defines how the report's date intervals are segmented. Select the check box to view 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 the report for a specific date/time range.
- **Date To:** Defines the report for a specific date/time range.
- **Worker:** Defines information related to a specific worker.
- **Worker Group:** Defines information related to a specific worker group.
- **Timezone Display Mode:** Defines the report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Display the information 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.
Emails Presented	Defines the number of emails routed to the Worker, regardless of whether the Worker replied to the email.
Emails Handled	Defines the number of emails that were accepted by the worker.
Emails Declined	Defines the number of emails that were not answered or were declined by the Worker.
Handle Ratio (%)	Defines the Handle ratio: emails that the Worker handled / emails that are routed to the Worker (overall percentage).
Transfer Out	Defines the available field for queued emails. Defines the number of emails that were transferred by the Worker to other Workers.
Max	Defines the longest interacting time of any email that the Worker

Field	Description
Interaction Time	handled. Talk Time refers to the elapsed time between the time a Worker accepted the email and the time that the email was sent or transferred.
Avg. Interaction Time	Defines the average interacting time for emails that the Worker handled.

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

Interaction Center Reports

≡ Email Worker Activity Report

Filter Summary
Worker Name: Any | Worker Group Name: Any |

Filter Options

Show 25 entries Search:

Worker Name	Emails Presented	Emails Handled	Emails Declined	Handle Ratio (%)	Transfer Out	Max. Talk Time	Avg. Talk Time
John Wesselman	33	23	10	70	0	04:53:48	00:48:57
Oren Batchelor	3	2	1	67	0	00:04:07	00:03:47

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Queue Activity Report

The Queue Activity Report displays summarized information of emails per queue (e.g., Presented and Handled).

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

➤ **To generate a Queue Activity report:**

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

Interaction Center Reports

≡ Queue Activity Report

Filter Options

Interval Use Interval

Date From

Date To

Queue Name

Time Zone Display Mode

Generate Export CSV Reset Filter

- 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 the report for a specific date/time range.
- **Date To:** Defines the report for a specific date/time range.
- **Queue Name:** Defines information related to a specific queue name or 'Any' to show statistics for all call queues.
- **Timezone Display Mode:** Defines the report in a different time zone.
 - ◆ **Tenant time zone:** Defines the information in the report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Defines the information in the report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Defines the information in the 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 email is queued.
Emails Presented	Defines the number of emails routed to the queue, regardless of whether a Worker replied.
Emails Handled	Defines the number of emails that are handled by this Queue. An email is handled if a customer is connected to a Worker while queued for this Queue.
Max. Handle Time	Defines the longest handle time of any email that the queue handled by the Worker.
Avg. Handle Time	Defines the average handle time for all emails that the queue handled by the Worker.
Avg. Queue Time	Defines the average queue time for all emails routed to the Queue.
Max. Queue	Defines the longest queue time of any one email that was routed to the

Field	Description
Time	Queue.
Avg. Answer Speed	Defines the Average Answer Speed: Total queue time / emails handled.

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

Interaction Center Reports

≡ Email Queue Activity Report

Filter Summary
Queue Name: Any |

Filter Options

Show 25 entries Search:

Queue Name	Emails Presented	Emails Handled	Max. Handle Time	Avg. Handle Time	Avg. Queue Time	Max. Queue Time	Avg. Answer Speed
IT HW & SW	27	27	04:53:48	00:32:27	04:24:09	17:30:05	04:24:09

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Worker Report

The Worker Report presents a summary of each email that is received by the Worker.

➤ **To generate a Worker report:**

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

Interaction Center Reports

≡ Worker Report

Filter Options

Date From

Date To

Worker Any

Queue Name Any

Time Zone Display Mode Tenant Time Zone

Generate Export CSV Reset Filter

2. Select the appropriate filter fields to generate your report:
 - **Date From:** Defines the report for a specific time range.
 - **Date To:** Defines the report for a specific time range.
 - **Worker:** Defines information related to a specific worker.

- **Queue Name:** Defines information related to a specific queue name or 'Any' to show statistics for all call queues.
- **Timezone Display Mode:** Display the report in a different time zone. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Display the information in the report based on the tenant configured time zone.
 - ◆ **Flow time zone:** Display the information in the report based on the time zone configured under the Telephony Setting settings.
 - ◆ **Local time zone (Web):** Display the information in the 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.
Email Start Time	Defines the date and time the email started.
Email End Time	Defines the date and time the email ended.
Email Duration	Defines the duration of the email.
Status	Defines whether the email was 'Accepted' or 'Declined' by the worker.
Email Routed Queue	Defines the queue to which the email is queued.
Email Skills	Defines the skills that are associated with the queue to which the email is routed.
Interaction Time	Defines how long the worker handled the email.
Wrap-up Time	Defines the duration it took the worker to complete the wrap-up.

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

Interaction Center Reports

Webchat Worker Report

Filter Summary
Queue Name: Any | Worker Name: Any |

Filter Options

Show 25 entries Search:

Worker Name	Chat Start Time	Chat End Time	Chat Duration	Status	Chat Routed Queue	Chat Skills	Interaction	Wrap-up Time
John Wesselman	2024-03-18 05:41:38	2024-03-18 05:55:46	00:14:08	Accepted	IT HW & SW	IT Support	00:14:03	00:00:00
	2024-03-25 10:52:25	2024-03-25 10:57:50	00:05:25	Accepted	IT HW & SW	HW support	00:05:22	00:00:00
	2024-03-25 14:18:29	2024-03-25 14:26:41	00:08:12	Accepted	IT HW & SW	HW support	00:08:00	00:00:00
	2024-03-25 15:11:49	2024-03-25 15:14:42	00:02:53	Accepted	IT HW & SW	HW support	00:02:39	00:00:00
	2024-03-25 16:24:12	2024-03-25 16:26:35	00:02:23	Accepted	IT HW & SW	HW support	00:02:12	00:01:00
	2024-03-26 11:11:22	2024-03-26 11:21:33	00:10:11	Accepted	IT HW & SW	HW support	00:10:04	00:00:00

Interaction Center Reports - Chat

You can generate the following Chat Interaction Center historical reports:

- Worker Activity Report
- Queue Activity Report
- Worker Report

Worker Activity Report

The Chat Worker Activity report displays a summary of workers' chat activities, including chats and workers state activities.

➤ **To generate Worker Activity report:**

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

Interaction Center Reports

Worker Activity Report

Filter Options

Interval Use Interval

Date From

Date To

Worker

Worker Group

Interaction Type

Time Zone Display Mode

Generate Export CSV Reset Filter

2. Select the appropriate filter fields:

- **Interval:** Defines how the report's date intervals are segmented. Select the 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:** 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.
- **Worker:** Defines information that is related to a specific worker.
- **Worker Group:** Defines information that is related to a specific worker group.
- **Interaction Type:** Defines if the interaction is a webchat or an SMS or both (All).
- **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.
Chats Presented	Defines the number of chats routed to the Worker, regardless of whether the Worker replayed the chat.
Chats Handled	Defines the number of chats that were accepted by the worker.
Chats Declined	Defines the number of chats that were not answered or were declined by the Worker.
Handle Ratio (%)	Defines the Handle ratio: chats that the Worker handled / chats that are routed to the Worker (Overall percentage).
Transfer Out	Defines the available field for queued chats: number of chats that were

Field	Description
	transferred by the worker to other workers.
Max Interaction Time	Defines the longest interacting time of any chat that the Worker handled. Talk Time refers to the elapsed time between the time a Worker accepted the chat and the time that the chat was sent or transferred.
Avg. Interaction Time	Defines the average interacting time for chats that the Worker handled.

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

Interaction Center Reports

Webchat Worker Activity Report

Filter Summary
Worker Name: Any | Worker Group Name: Any |

Filter Options

Show 25 entries Search:

Worker Name	Chats Presented	Chats Handled	Chats Declined	Handle Ratio (%)	Transfer Out	Max. Talk Time	Avg. Talk Time
John Wesselman	35	33	2	94	0	03:05:18	00:18:41
Oren Batchelor	3	3	0	100	0	00:05:24	00:02:28

Showing 1 to 2 of 2 entries First Previous 1 Next Last

Queue Activity Report

The Queue Activity Report displays summarized information of chats per queue (e.g., Presented and Handled).

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

➤ To generate Queue Activity report:

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

Interaction Center Reports

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.
- **Interaction Type:** Defines if the interaction is a webchat or an SMS or both (All).
- **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 chat is queued.

Field	Description
Chats Presented	Defines the number of chats routed to the queue, regardless of whether a Worker replied.
Chats Handled	Defines the number of chats that are handled by this Queue. A chat is handled if a customer is connected to a Worker while queued for this Queue.
Max. Handle Time	Defines the longest handle time of any chat that the queue handled by the Worker.
Avg. Handle Time	Defines the average handle time for all chats that the queue handled by the Worker.
Avg. Queue Time	Defines the average queue time for all chats routed to the Queue.
Max. Queue Time	Defines the longest queue time of any one chat that was routed to the Queue.
Avg. Answer Speed	Defines the Average Answer Speed (total queue time / chats handled).

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

Interaction Center Reports

Webchat Queue Activity Report

Filter Summary
Queue Name: Any |

Filter Options

Show 25 entries

Queue Name	Chats Presented	Chats Handled	Max. Handle Time	Avg. Handle Time	Avg. Queue Time	Max. Queue Time	Avg. Answer Speed
IT HW & SW	41	40	03:05:18	00:17:20	00:01:39	00:36:54	00:01:42

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Worker Report

The Worker Report presents a summary of each chat that is received by the Worker.

➤ To generate Worker Report:

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

Interaction Center Reports

The screenshot shows a 'Worker Report' filter options panel. It contains the following fields:

- Date From:** A date input field with a calendar icon and a clear button.
- Date To:** A date input field with a calendar icon and a clear button.
- Worker:** A dropdown menu currently set to 'Any'.
- Queue Name:** A text input field with 'Any' and a clear button.
- Interaction Type:** A text input field with 'All' and a clear button.
- Time Zone Display Mode:** A dropdown menu currently set to 'Tenant Time Zone'.

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

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.
- **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
- **Interaction Type:** Defines if the interaction is a webchat or an SMS or both (All).
- **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.
Chat Start Time	Defines the date and time the chat started.
Chat End Time	Defines the date and time the chat ended.
Chat Duration	Defines the duration of the chat.
Status	Defines whether the chat was 'Accepted' or 'Declined' by the worker.

Report Column	Description
Chat Routed Queue	Defines the queue to which the chat is queued.
Chat Skills	Defines the skills that are associated with the queue to which the chat is routed.
Interaction Time	Defines how long the worker handled the chat.
Wrap-up Time	Defines the duration it took the worker to complete the wrap-up.

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

Interaction Center Reports

≡ Webchat Worker Report

Filter Summary
Queue Name: Any | Worker Name: Any |

Filter Options

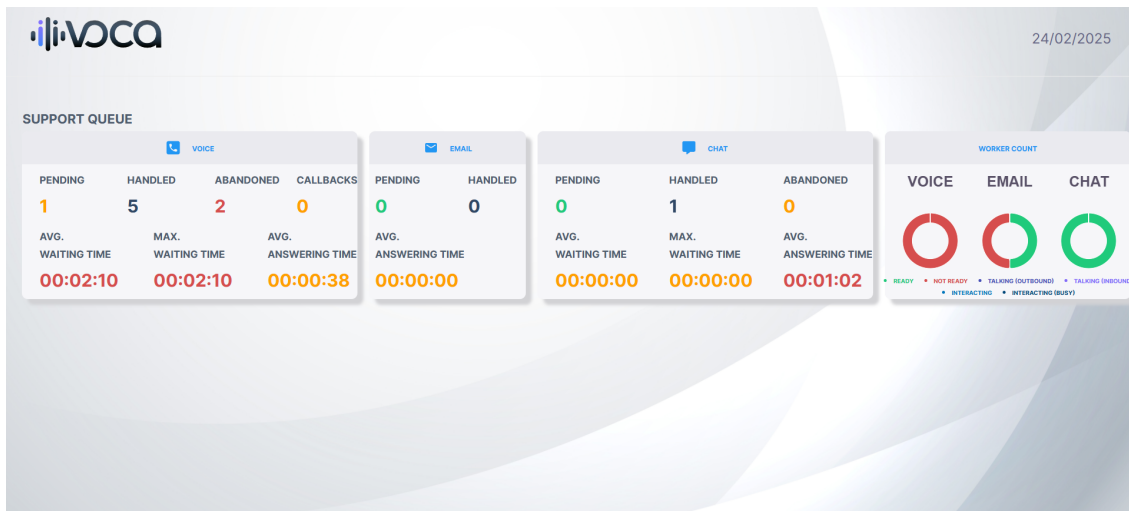
Show 25 entries Search:

Worker Name	Chat Start Time	Chat End Time	Chat Duration	Status	Chat Routed Queue	Chat Skills	Interaction	Wrap-up Time
John Wesselman	2024-03-18 05:41:38	2024-03-18 05:55:46	00:14:08	Accepted	IT HW & SW	IT Support	00:14:03	00:00:00
	2024-03-25 10:52:25	2024-03-25 10:57:50	00:05:25	Accepted	IT HW & SW	HW support	00:05:22	00:00:00
	2024-03-25 14:18:29	2024-03-25 14:26:41	00:08:12	Accepted	IT HW & SW	HW support	00:08:00	00:00:00
	2024-03-25 15:11:49	2024-03-25 15:14:42	00:02:53	Accepted	IT HW & SW	HW support	00:02:39	00:00:00
	2024-03-25 16:24:12	2024-03-25 16:26:35	00:02:23	Accepted	IT HW & SW	HW support	00:02:12	00:01:00
	2024-03-26 11:11:22	2024-03-26 11:21:33	00:10:11	Accepted	IT HW & SW	HW support	00:10:04	00:00:00

Real-Time Dashboard

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

For Tenant with Digital Engagement (omnichannel), the real-time dashboard displays all essential statistics for each communication channel on one-screen.



Adding a Real-Time Dashboard

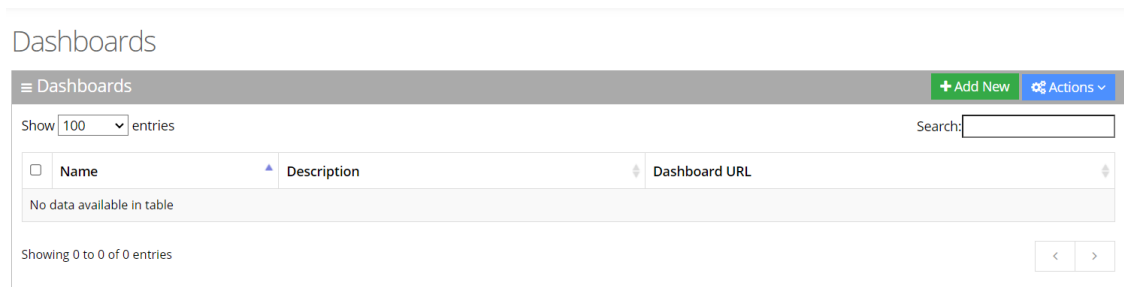
The procedure below describes how to add a new real-time dashboard.



Before adding a dashboard, ensure you have configured a Skill-based Queue, for details, see [Configuring Worker Queues](#) on page 128.

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

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



The following is displayed:

- **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:

Access Permission

Public

Selected Users

Selected Users ⓘ

Danielle Smith ✕

Supervisors

Mike Jackson

Workers

Brad Brown

Ruth Wilson

Daniel Black



The drop-down list displays eligible users for the real-time dashboard. These users are either:

- SSO users with view/edit permissions (configured in the Users list). For details, see [Access Management](#).
- Supervisors and workers configured in this tenant. For details, see [Adding a Worker](#) on page 88.

5. Toggle the **Enable** button to display the statistics on the real-time dashboard.
6. From the 'Queue Name', select the queue to be monitored.
7. Enter threshold values for voice, email, and chat (if applicable). The threshold colors are determined by the upper limit of each color's number range.



Example:

If you're setting thresholds for pending calls:

- Define the yellow: 2 calls (warning)
- Define the red: 4 calls (critical)

By default, up to 2 calls (0 or 1) will be green (optimal).

- **Voice information:**

Field	Description
Pending Calls	Defines the minimum and maximum threshold for calls waiting in the queue.
Calls Abandoned	Defines the minimum and maximum threshold for abandoned calls.
Pending Callbacks	Defines calls that were scheduled for a follow-up but have not yet been completed.
Longest Waiting	Defines the minimum and maximum threshold for the longest call

Field	Description
Time	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).

- **Email information**

Field	Description
Pending Email	Defines the minimum and maximum threshold for emails waiting in the queue.
Average Answering Time	Defines the minimum and maximum threshold for the average answering time.

- **Chat information**

Field	Description
Pending Chats	Defines the minimum and maximum threshold for chats waiting in the queue.
Chats Abandoned	Defines the minimum and maximum threshold for abandoned chats.
Longest Waiting Time	Defines the minimum and maximum threshold for the longest chat 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).


Editing a Real-Time Dashboard

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

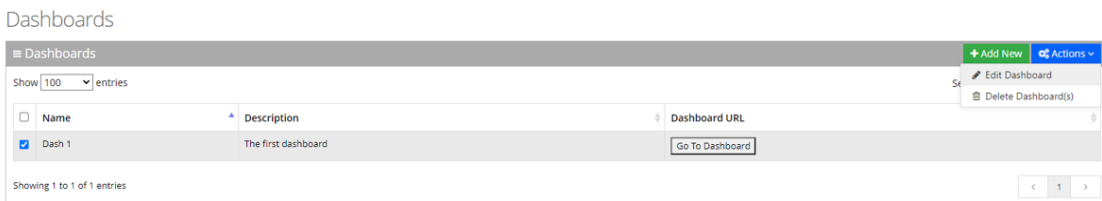
➤ **To edit a real-time dashboard:**

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



 Click **Go to Dashboard** to view the real-time dashboard interface.

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:

The 'Edit Dashboard' form contains several sections:

- Name:** A text input field containing 'Tech Writer Board'.
- Description:** An empty text input field.
- Access Permission:** Radio buttons for 'Public' and 'Selected Users' (which is selected).
- Selected Users:** A dropdown menu showing three selected users: 'Mike Jackson', 'Danielle Smith', and 'George White'.
- Enabled:** A radio button that is selected.
- Queue Name:** A dropdown menu showing 'JIRA expert'.
- Pending Emails:** Two input fields, one with '0' and one with '1'.
- Average Answering Time:** Two input fields, both showing '00:00:00'.

 At the bottom of the form is a blue 'Save Changes' button.

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

Deleting a Real-Time Dashboard

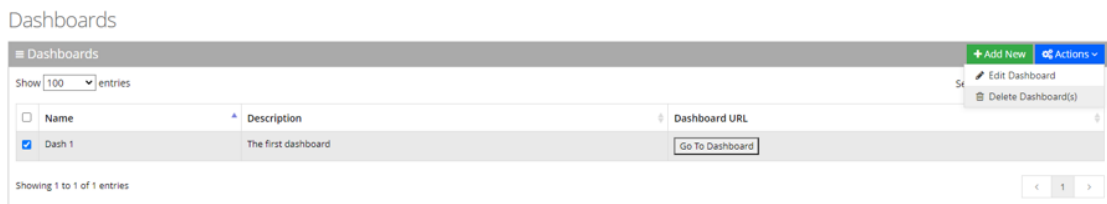
The procedure below describes how to delete a real-time dashboard.

➤ **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.



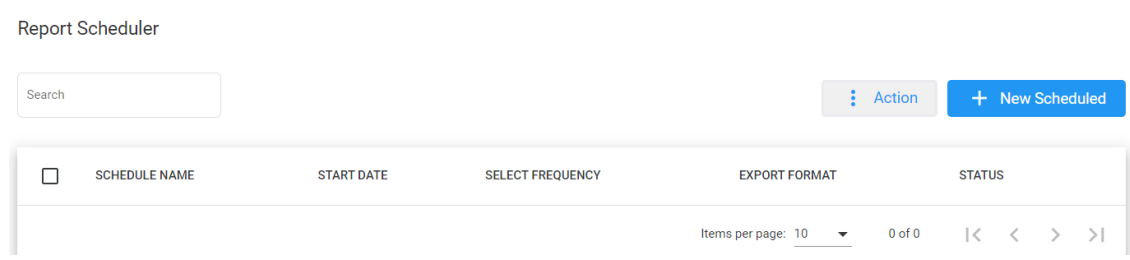
The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click [here](#).

Adding a Report Scheduler

The procedure below describes how to add a Report Scheduler.

➤ **To add a new Report Scheduler:**

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



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

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

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

NEW SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name

Report export method

Start date & time mm/dd/yyyy --:-- --

End date & time mm/dd/yyyy --:-- --

Export Frequency

At

Daily

Time

--:-- --

Export Format

Email Subject

Recipients

Report Details

Reports

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.

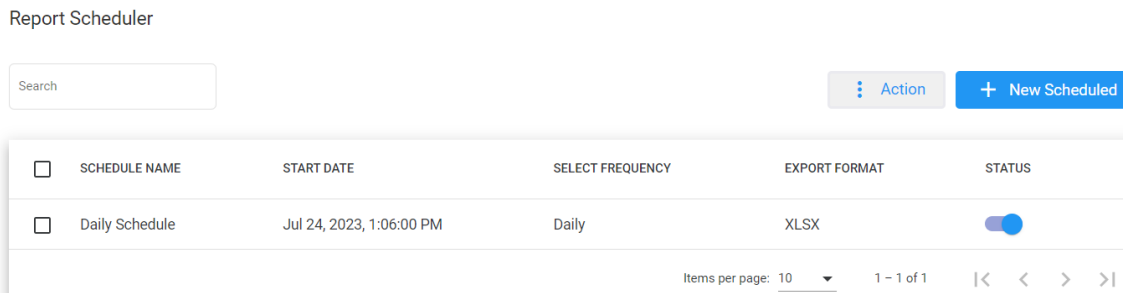
6. Click **Save Changes**.

Editing a Report Scheduler

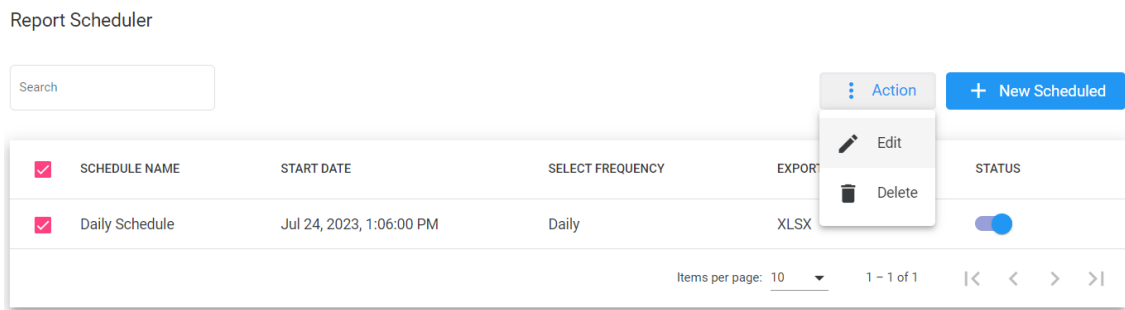
The procedure below describes how to edit a Report Scheduler.

➤ **To edit a Report Scheduler:**

1. Open the Report Scheduler page (**Reports > 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:

EDIT SCHEDULED REPORT

Please edit the details of your Scheduled Reports

Schedule Name
Daily Schedule

Report export method
Email

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

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

Export Frequency
At
Daily

Time
01:41 PM

Export Format
XLSX

Email Subject
Overall - Daily

Recipients
admin@voca.audiocodes.com

Report Details

Reports
Overall

Queue Name

Call Source
Exact

Call Destination
Exact

Wait Time (Sec.)
From To

Status
Any

Timezone Display Mode
Tenant Time zone

Cancel Schedule

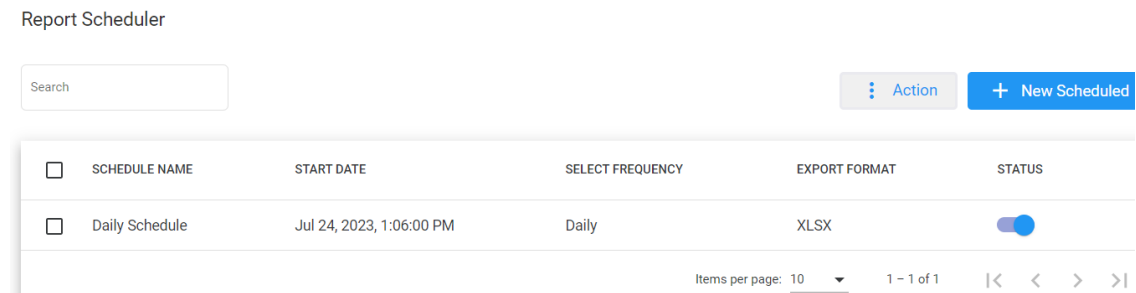
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

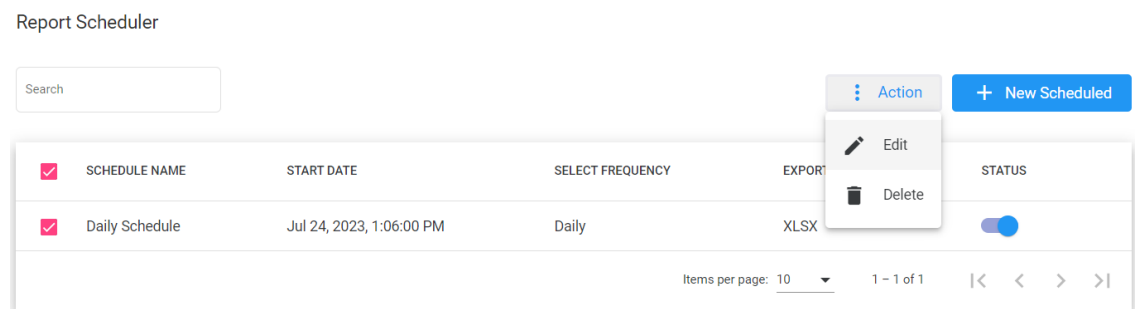
The procedure below describes how to delete a Report Scheduler.

➤ To delete a Report Scheduler:

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

IVR Reports

Drill-down

Filter Options

Date From	<input type="text"/>	<input type="text"/>
Date To	<input type="text"/>	<input type="text"/>
Call Source	<input type="text"/>	Exact
Call Routed	<input type="text"/>	Exact
Call Duration	<input type="text"/>	To <input type="text"/>
Call Disposition	Any	
DNIS	Any	
Timezone Display Mode	Tenant Time zone	

Generate Export CSV Reset Filter

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

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

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

Each recognition includes the following:

Field	Description
Result string	Displays the analyzed result returned from the ASR.
State ID	Displays the ID that specifies the step within the call that the 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

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 > IVR Reports > Journey Manager**); the following appears:

Interaction Center Reports

The screenshot shows the 'Filter Options' section in the Journey Manager interface. It contains the following fields and controls:

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

At the bottom of the filter options, there are two buttons: a blue 'Generate' button and a grey 'Reset Filter' button.

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 281.
- **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
Tenant	Defines
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 time zone of the call.
Duration	Defines the duration of the call.

IVR Reports

≡ Journey Manager

Filter Summary

Queue Name: Any |

Filter Options

Show 25 entries Search:

	Tenant	Domain	Source	Destination	Start Time	End Time	Time Zone	Duration	Status
+	Voca Training s1	Vocatraining.com	+972	+972	2025-09-29 15:09:55	2025-09-29 15:11:14	UTC +3:00	79	Call abandoned
+	Voca Training s1	Vocatraining.com	+6000	+7000	2025-09-16 12:24:57	2025-09-16 12:25:42	UTC +3:00	45	Transferred from Queue
+	Voca Training s1	Vocatraining.com	+6000	+7000	2025-09-16 10:51:12	2025-09-16 10:52:13	UTC +3:00	61	Transferred from Queue
+	Voca Training s1	Vocatraining.com	+6000	+7000	2025-09-16 10:50:34	2025-09-16 10:50:50	UTC +3:00	16	Disconnect
+	Voca Training s1	Vocatraining.com	+6000	+7000	2025-09-15 13:34:33	2025-09-15 13:34:58	UTC +3:00	25	Missed calls notification
+	Voca Training s1	Vocatraining.com	+6006	+7000	2025-09-15 13:33:31	2025-09-15 13:33:34	UTC +3:00	3	Disconnect
+	Voca Training s1	Vocatraining.com	+6000	+7000	2025-09-15 13:32:53	2025-09-15 13:33:14	UTC +3:00	21	Disconnect

- 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	-	-	-					

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 Overall Performance page (**Reports > IVR Reports > Overall Performance**); the following appears.

IVR Reports

☰
Overall Performance

▼ Filter Options

Date From	<input type="text"/>	📅	<input type="text"/>	🕒	
Date To	<input type="text"/>	📅	<input type="text"/>	🕒	
Call Source	<input type="text"/>		Exact	▼	
Call Routed	<input type="text"/>		Exact	▼	
Call Duration	<input type="text"/>	to	<input type="text"/>		
Call Disposition	<input type="text" value="Any"/>				
DNIS	<input type="text" value="Any"/>				
Timezone Display Mode	<input type="text" value="Tenant Time zone"/>				

Generate
Reset Filter

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

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

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

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

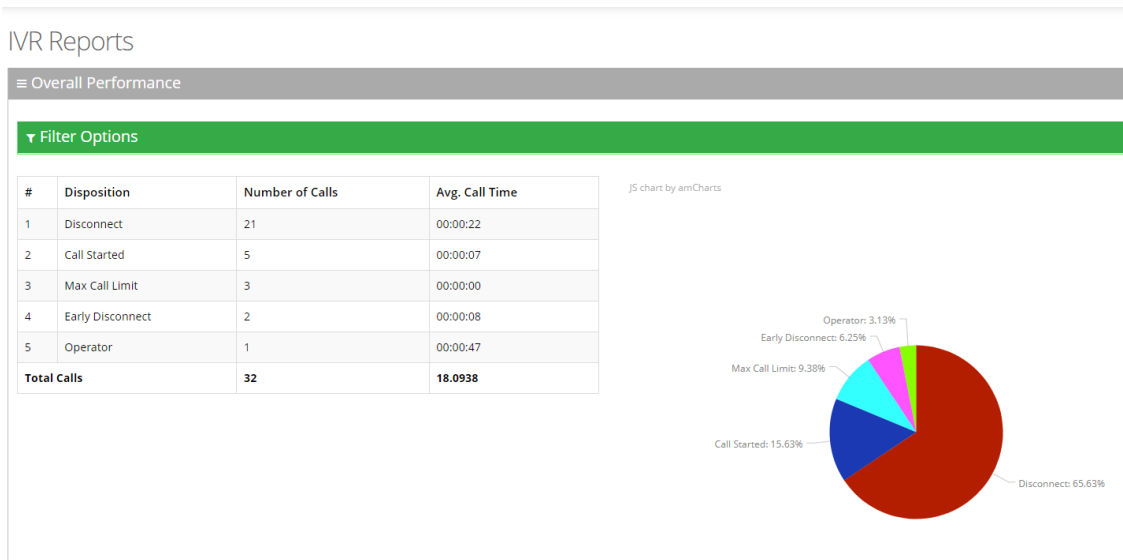
The time zone of calls can be one of the following options:

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

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

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

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



Call Hour Report

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

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

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

Figure 7-1: Call Hour IVR Filter Options

The screenshot shows the 'Filter Options' section of the Call Hour report. It includes several input fields and dropdown menus for filtering data.

- Date From:** Input field with a calendar icon.
- Date To:** Input field with a calendar icon.
- Call Source:** Input field with an 'Exact' dropdown menu.
- Call Routed:** Input field with an 'Exact' dropdown menu.
- Call Duration:** Input field with a 'To' button.
- Call Disposition:** Dropdown menu set to 'Any'.
- DNIS:** Dropdown menu set to 'Any'.
- Timezone Display Mode:** Dropdown menu set to 'Tenant Time zone'.

At the bottom of the form, there are three buttons: 'Generate', 'Export CSV', and 'Reset Filter'.

2. Select the appropriate filter fields:

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

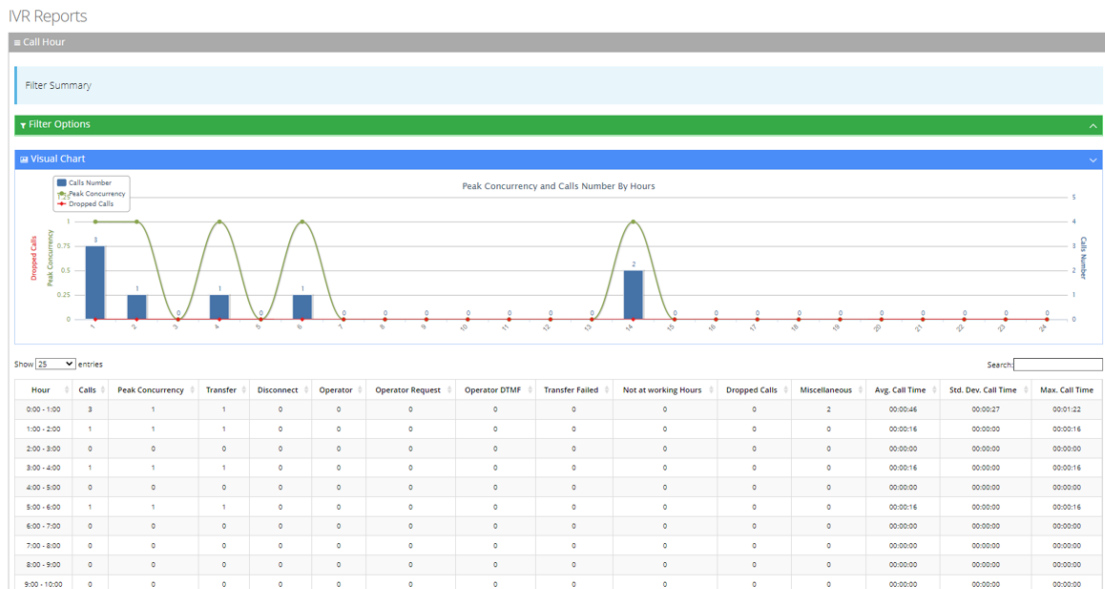
- **DNIS:** Defines information that is related to a specific destination number.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
 - ◆ **Tenant time zone:** Defines the information in this report based on the tenant 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.
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

Report Column	Description
	parameter represents the dropped calls for the past day. The calls are dropped when the Media Gateway module, which controls the total number of IVR ports, is configured with X number of channels. The X+1 call is rejected by the Media Gateway with SIP Error 404.
Miscellaneous	Defines the number of calls with disposition other to the ones in other columns.
Avg. Call Time (sec)	Defines the average call time in seconds.
Std. Dev. Call Time (sec)	Defines the standard deviation in call time, in seconds.
Max. Call Time (sec)	Defines the maximum call time in seconds.

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



Requested Contacts Report

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

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

1. Open the Requested Contacts page (**Reports > IVR Reports > Requested Contacts**); the following appears.

The screenshot shows the 'IVR Reports' interface. At the top, there is a header 'Requested Contacts'. Below it is a 'Filter Options' section with a green background. The filter options include:

- Date From:** A date input field with a calendar icon and a clear button.
- Date To:** A date input field with a calendar icon and a clear button.
- Menu:** A dropdown menu currently set to 'Any'.
- Timezone Display Mode:** A dropdown menu currently set to 'Tenant Time zone'.

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

2. Select the IVR 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

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

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

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

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

IVR Reports

Requested Departments										
Filter Summary										
Filter Options										
Show 25 entries										Search: <input type="text"/>
Department Name	Calls	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Miscellaneous	
Marketing	1	1	0	0	0	0	0	0	0	0
Purchasing	1	0	0	0	0	0	0	0	0	1
Sales	2	2	0	0	0	0	0	0	0	0

8 Actions

The following actions are supported by 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.

- **Callback:** Lets users request a callback, reserving their place in the queue. When their turn arrives, Voca CIC automatically calls them back.



The **Callback** action is available only for in-queue menus configured within the queue configuration page.

9 Call Dispositions

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

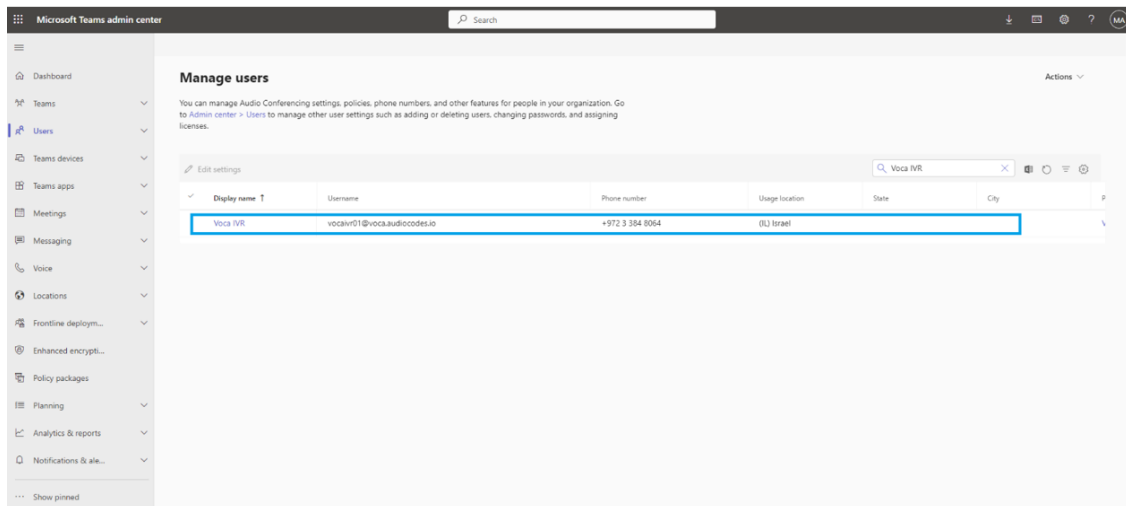
- **All Agents are Offline:** All worker/queue members are logged out from the queue.
- **Call Abandoned:** The call was abandoned while waiting in the queue.
- **Call Started:** Script execution failed. Error in Communication Portal software. Please contact Voca Team.
- **Disconnect:** Refers to calls 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.

A Appendix: DNIS Number for Operator Connect / Microsoft Calling Plan

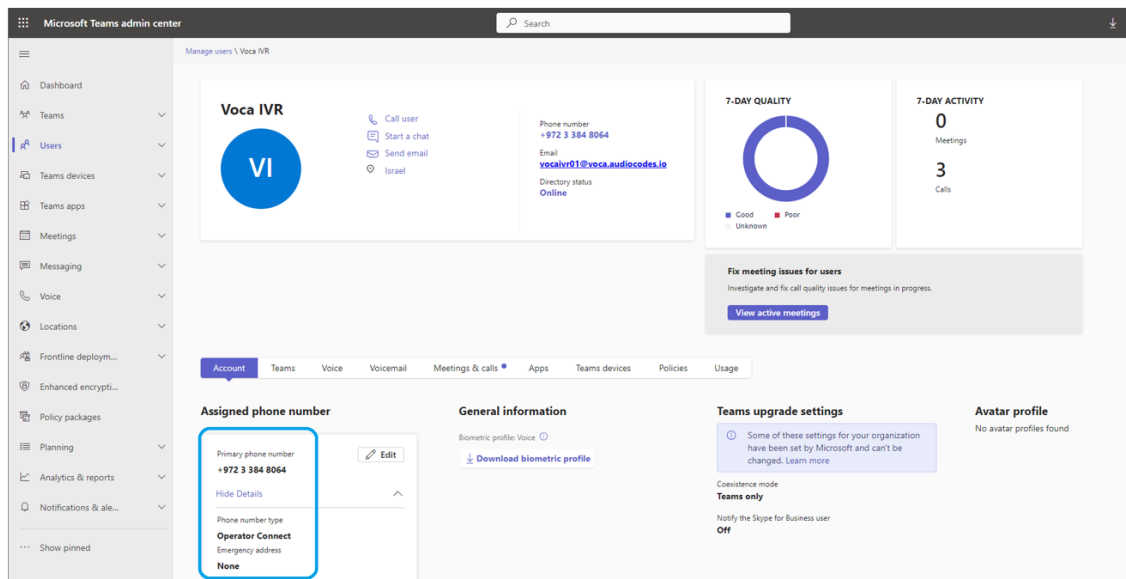
To use a DNIS number that supports Operator Connect or Microsoft Calling plan, make sure you have a designated Microsoft Teams user for it. If not, do the following:

1. Create a new Teams user and assign them a Teams phone license.
2. Make sure the user is visible within the Microsoft Teams Admin Center:



3. Assign the Operator Connect/ Calling Plan number to the new user. Each Microsoft Teams user can be associated with one DNIS number.

4. Make sure that the calling policy that is assigned to this user has the “SIP devices can be used for calls” enabled.



3. When done, proceed to configure this phone number's flow settings, for details, see [Adding a Flow Setting](#) on page 42.

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Document #: LTRT-28857

