Administrator's Guide

AudioCodes Voice.AI Solutions

Voca Conversational Interaction Center

Version 12.1

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Contact Us

International Headquarters

6 Ofra Haza Street
Naimi Park
Or Yehuda, 6032303, Israel
Tel: +972-3-976-4000
Fax: +972-3-976-4040

AudioCodes Inc.

80 Kingsbridge Rd
Piscataway, NJ 08854, USA
Tel: +1-732-469-0880
Fax: +1-732-469-2298

For other AudioCodes offices, go to https://www.audiocodes.com/corporate/offices-worldwide.

Contact us:https://www.audiocodes.com/corporate/offices-worldwide

Website:https://www.audiocodes.com/

Related Documentation

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Voca CIC Flow Designer User's Manual
Voca CIC Worker & Supervisor Application User's Manual

Document Revision Record

LTRT	Description
28856	Initial release for version 12.1

Table of Contents

1 Introduction

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

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

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

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

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

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

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

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

About this Guide

This guide is intended for 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)

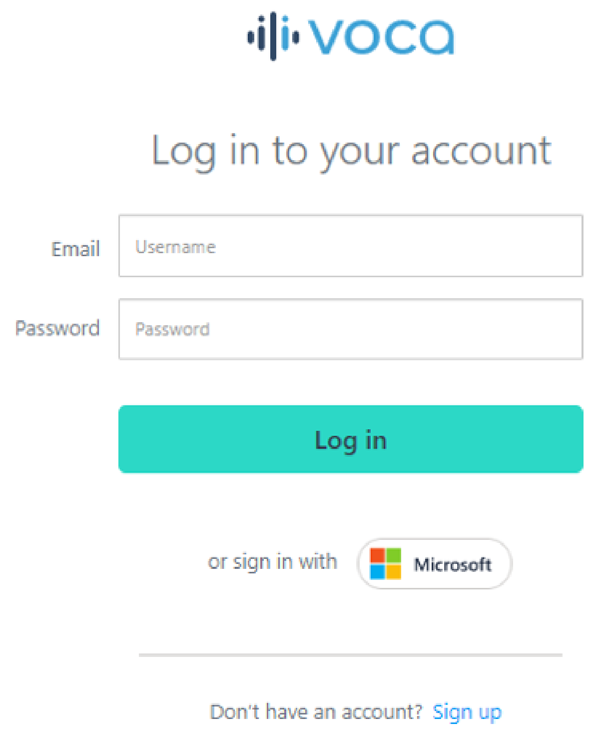
2 Getting Started

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.

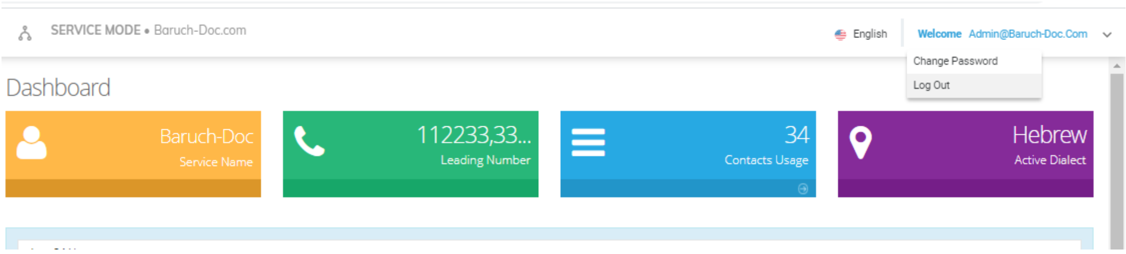


Changing your Password

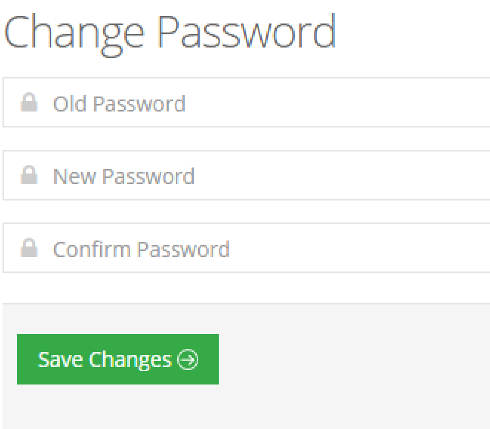
The procedure below describes how to change the login password.

➢ **To change the login password:**

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

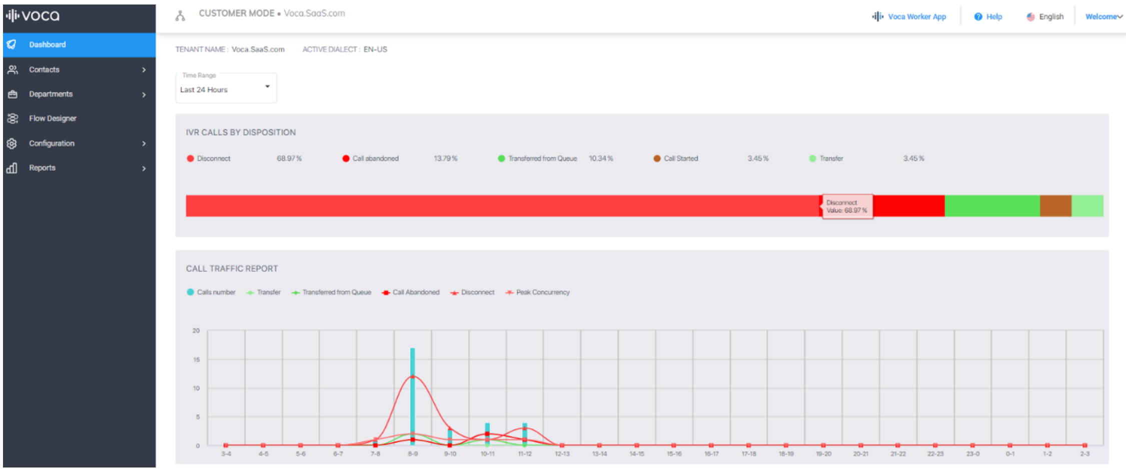


2. Select **Change Password** to change the password after initially logging in using the default (recommended); the following appears:



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

Getting Familiar with the GUI



Sidebar Panel

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

- **Dashboard:** This option displays Tenant Name, Active Dialect, and graphical summary statistics.
- **Contacts:** This option allows you to manage details of all your contacts, including adding, editing, and deleting contacts. You can also import and export your Contact list using CSV files.
- **Departments:** This option allows you to manage your Department Dictionaries and details of all your departments inside the Department Dictionary. The Department Dictionary is a list of departments which belong to a specific Application Support Package (ASP) and may be used as separate grammar when performing voice detection. Using the Departments menu, you can add, edit, and delete Department Dictionaries and Departments. You can also import and export your departments list from the ASP or from CSV files.
- **Flow Designer:** This option allows you to configure, design and manage complex call flows including API interactions.
- **Configuration:** This option allows you to configure various Voca system settings.
- **Reports:** This option allows you to produce a range of reports.

Dashboard

The following Dashboard titles appear in the colored boxes:

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

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

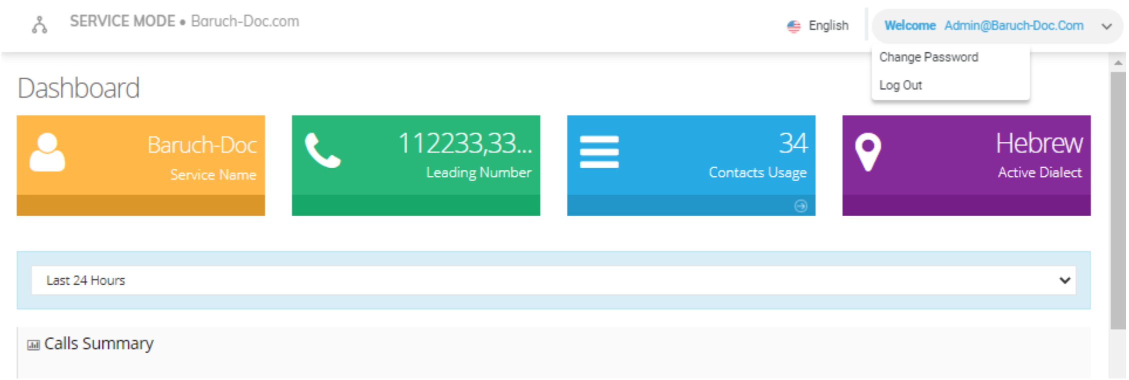
- Last 24 hours
- Last week
- Last month

Logging Out

The procedure below describes how to log out from Voca.

➢ **To log out from Voca:**

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



2. Select **Log Out**.

3 Managing Contacts

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

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

The Administrator can manage contacts in different ways:

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

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

For more information, refer to Directory Synchronization.

Contact Details Actions

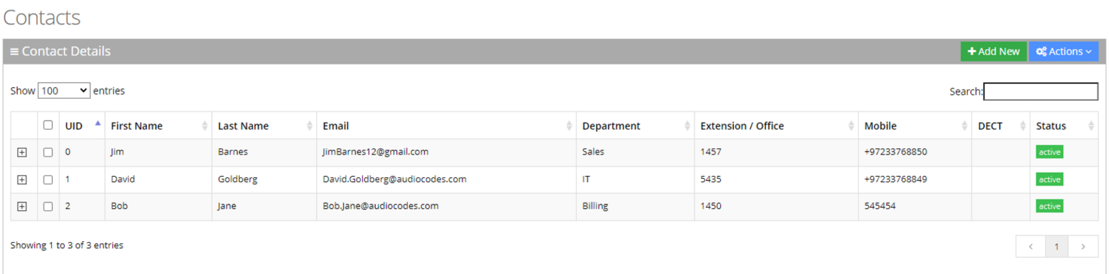
This section describes the various Contact Details actions that can be performed.

Adding a Contact

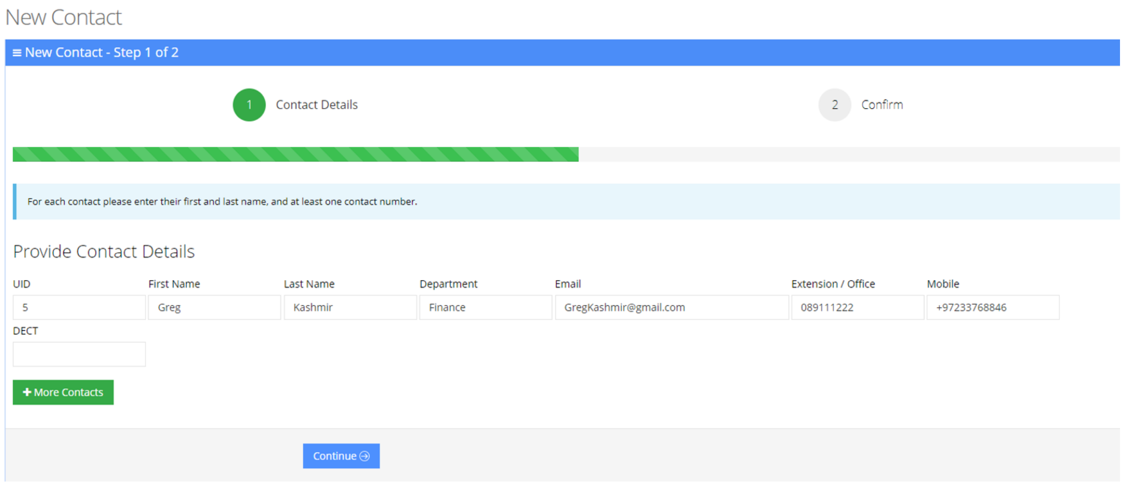
The following describes how to add a contact.

➢ **To add a contact:**

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



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



3. Under the Provide Contact Details group, enter the following:
    - UID
    - First Name
    - Last Name
    - Department
    - Email
    - Extension/Office
    - Mobile
    - DECT

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

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

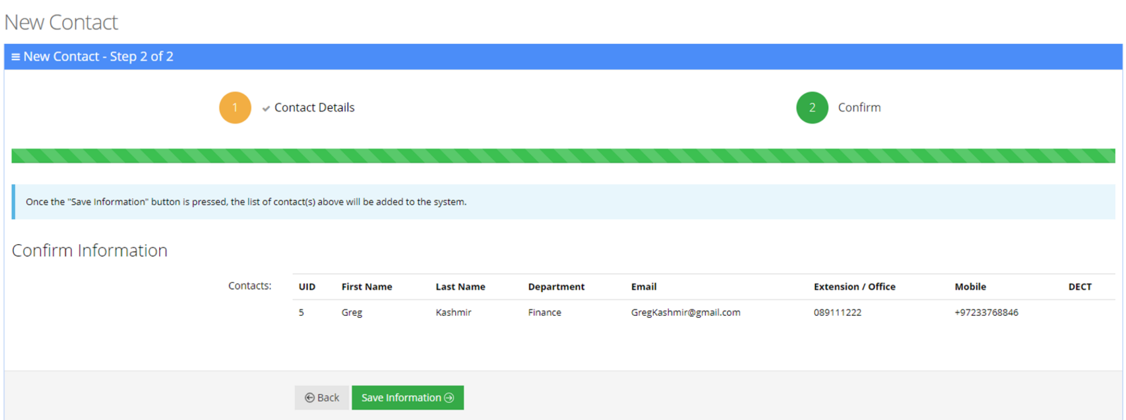


Figure 3-1:

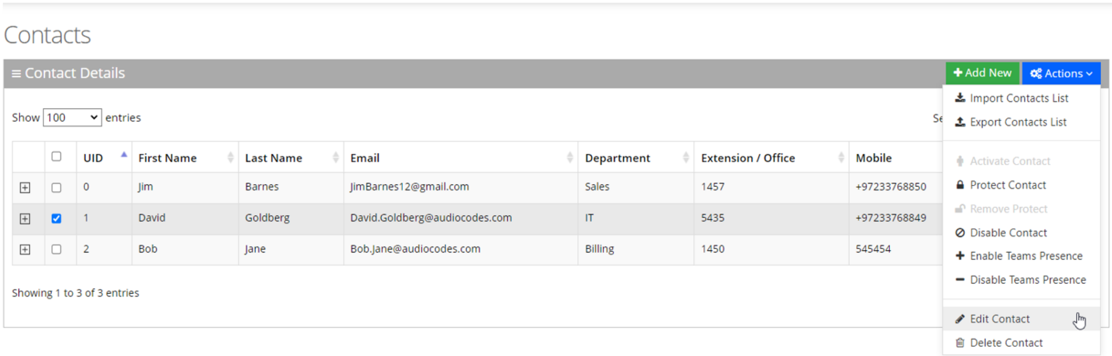
5. Click **Save Information**.

Editing a Contact

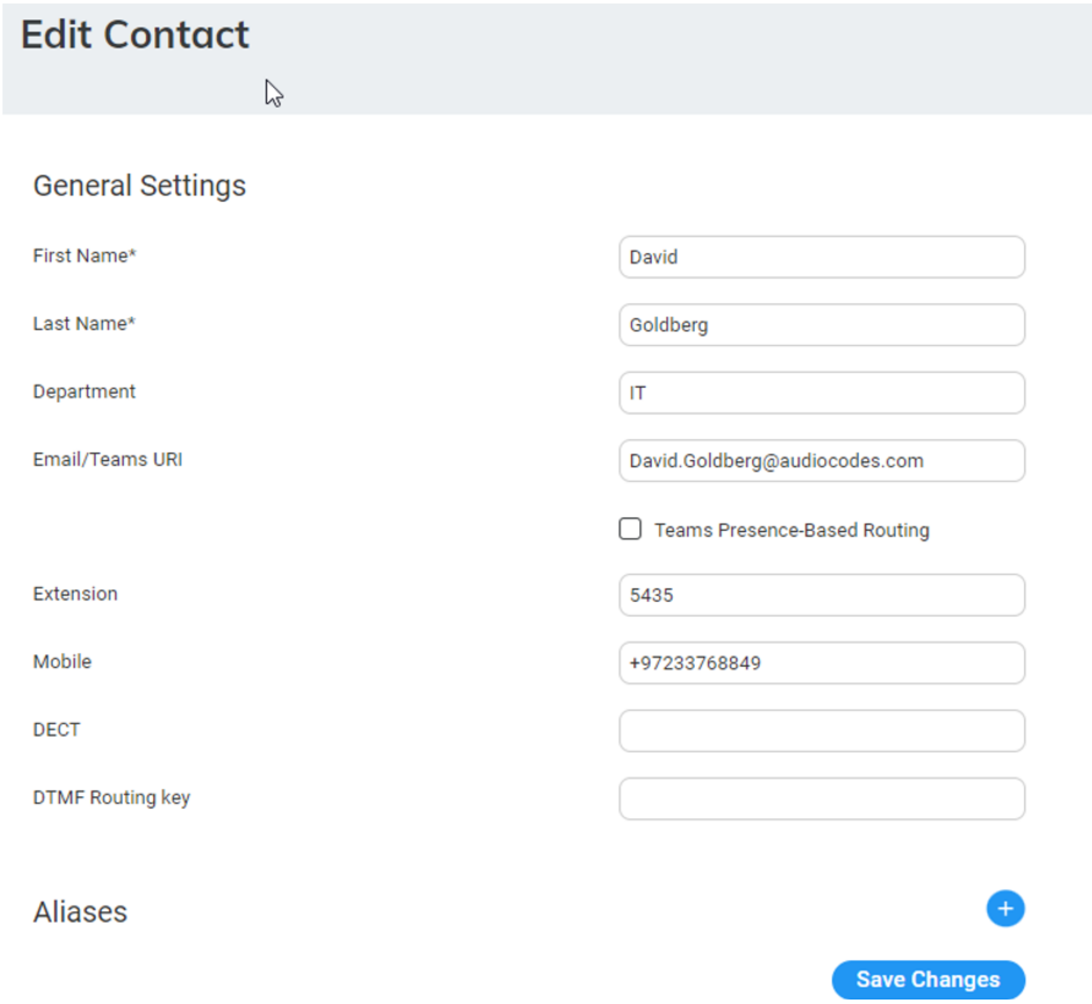
The procedure below describes how to edit a contact.

➢ **To edit a contact:**

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



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



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

Creating an Alias for a Contact

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

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

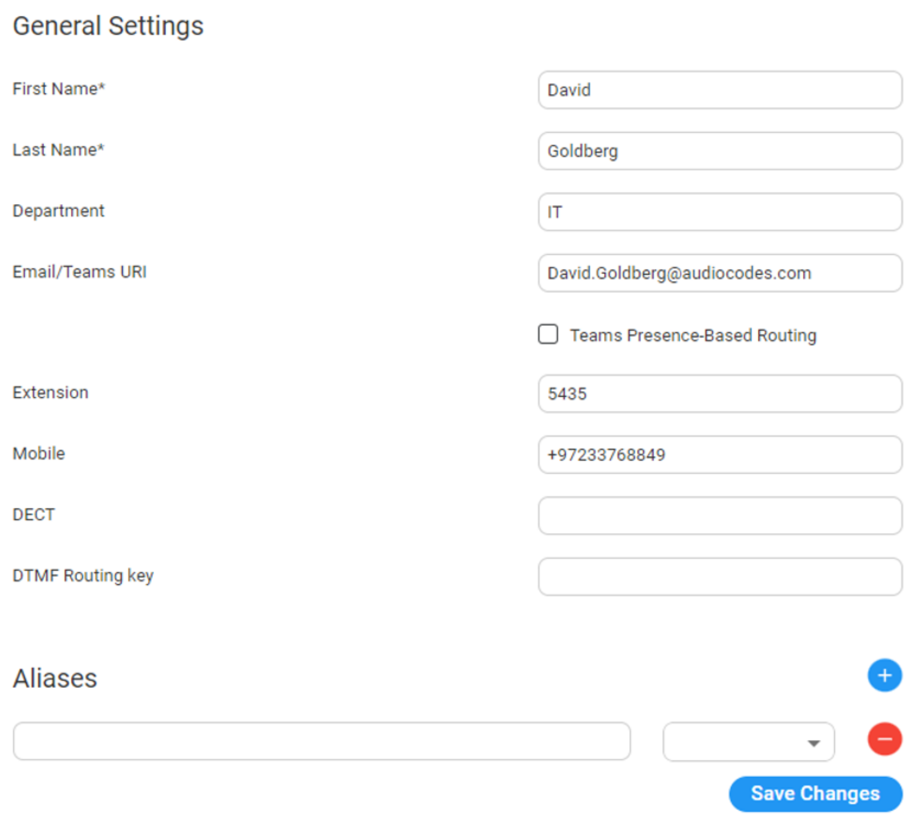
The alias for the contact can be configured for:

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

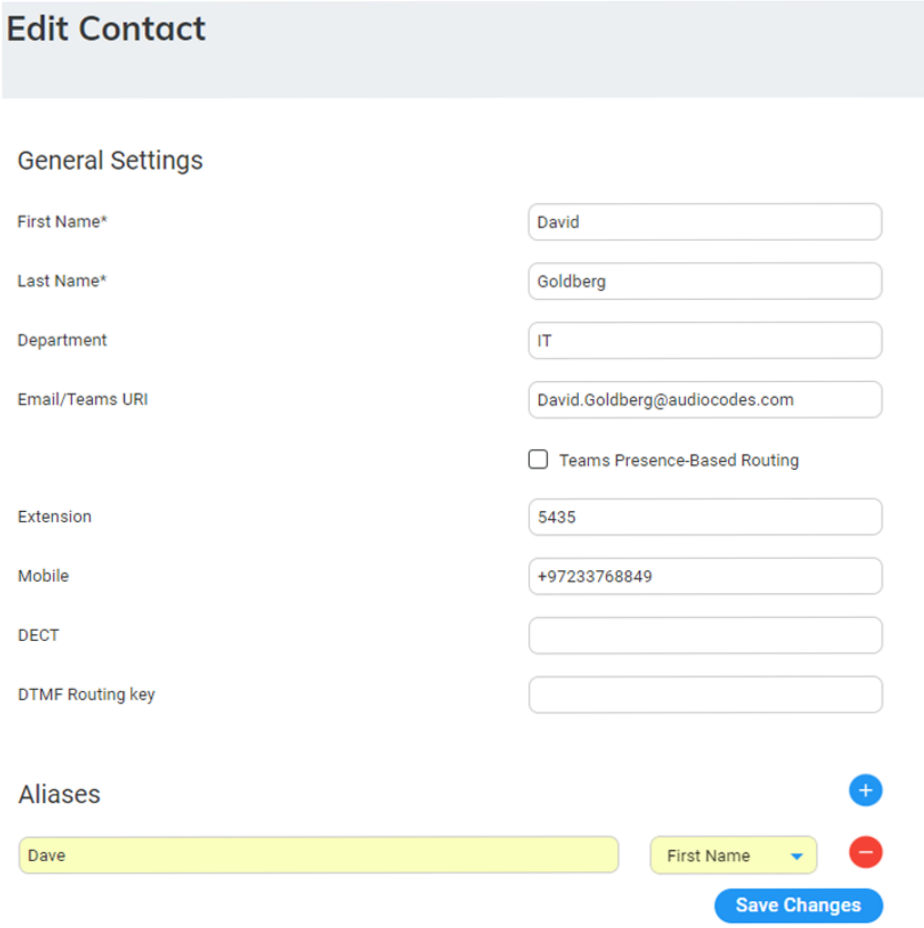
Depending on the configured option, the system will search for the contact with selected alias.

➢ **To create an alias for a contact:**

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



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



7. For more aliases, click the  sign.

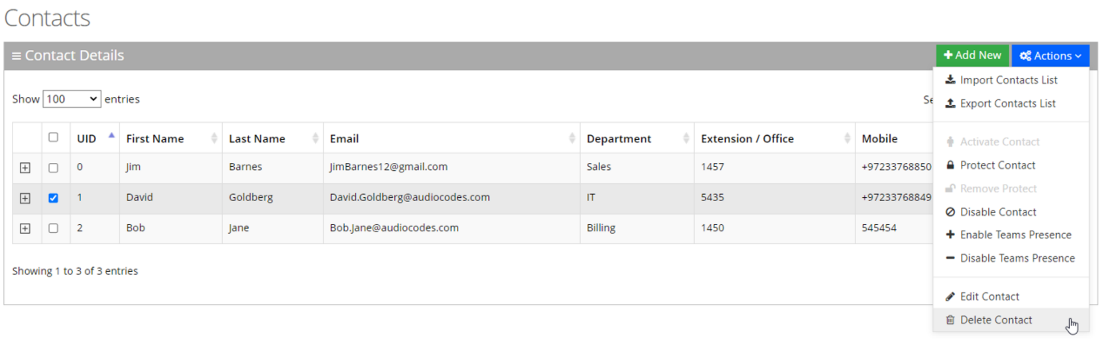
7. Click **Save Changes**.

Deleting a Contact

The procedure below describes how to delete a contact.

➢ **To delete a contact:**

1. Open the Contact Details screen (**Contacts** > **Contacts List**).
2. Select the contact you wish to delete by selecting the 'Contact' check box.
3. From the ‘Actions’ drop-down menu, choose **Delete Contact**.



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

Searching a Contact

The procedure below describes how to search for a contact.

➢ To search for a contact:

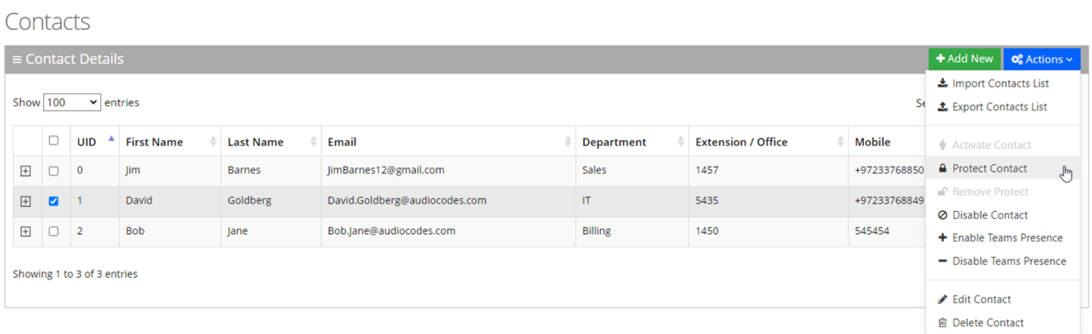
1. Open the Contacts menu (**Contacts** > <department Dictionary name>).
2. Click on the **Contact List** menu.
3. Enter the search criteria in the Search field; the searched data is displayed.

Protecting a Contact

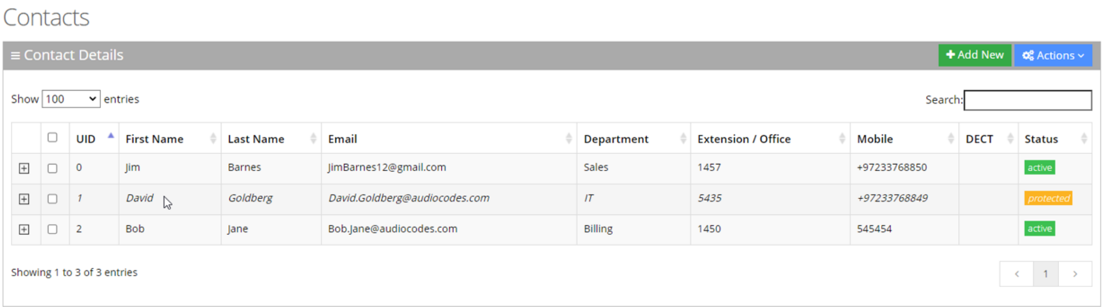
In most cases, the Contacts List is retrieved from an external source (e.g., Active Directory or a CSV file). Organization administrators have the option to change specific contact details and set the contact to Protect mode. By doing this, a re-synchronization of the Contacts List will not override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

➢ To protect a contact:

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



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

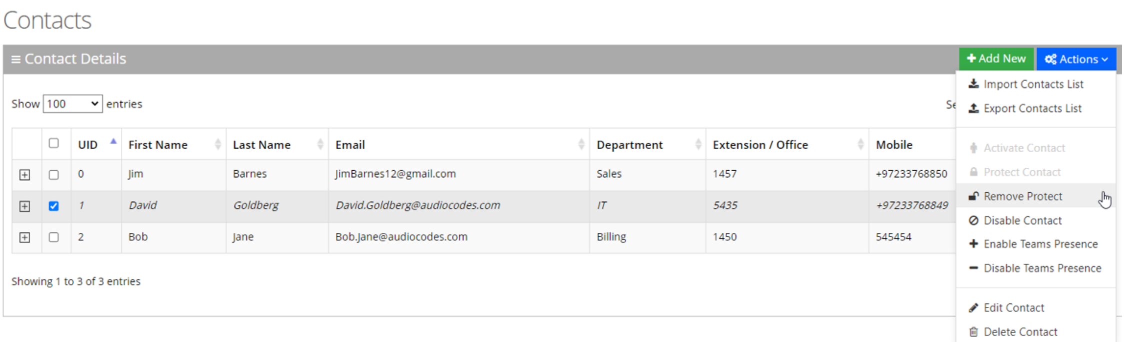


Removing Protection from a Contact

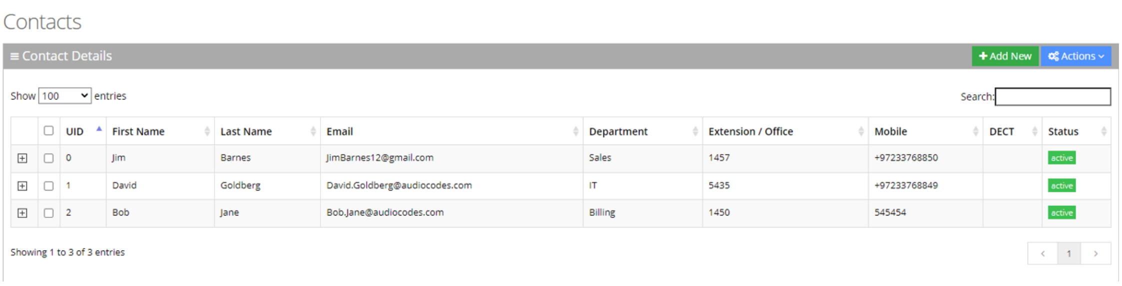
The procedure below describes how to remove protection from a contact.

➢ To remove protection from a contact:

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



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



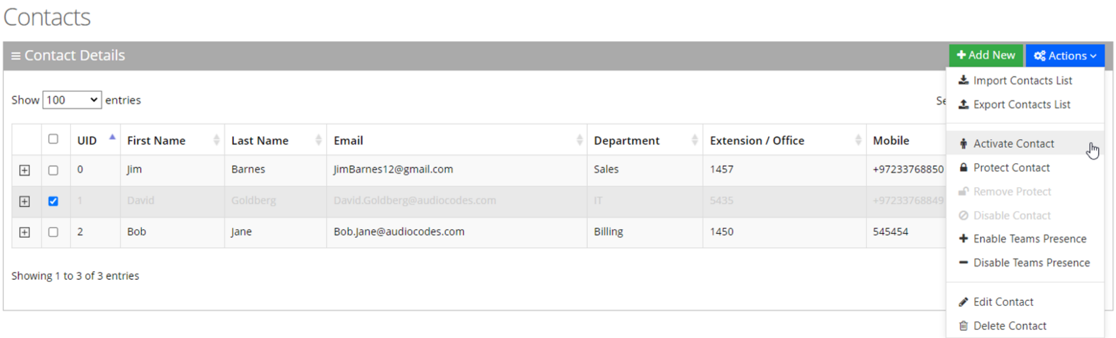
Activating a Contact

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

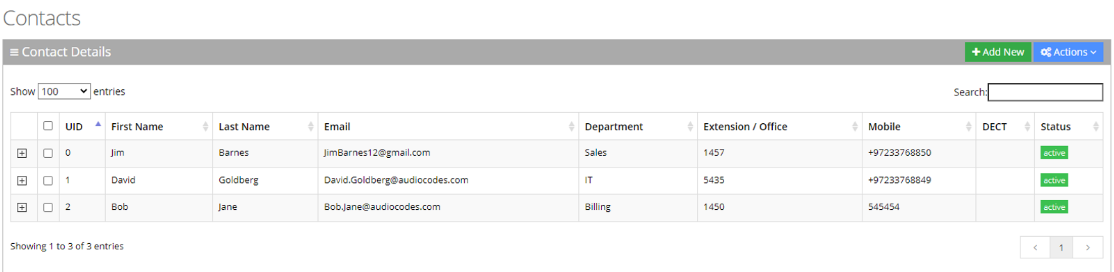
➢ To activate a contact:

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

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



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



Disabling a Contact

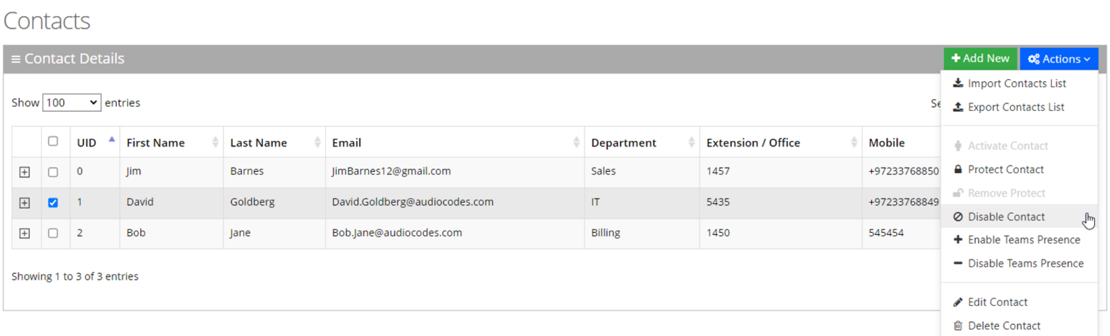
When you disable a contact, the system removes the contact from the Contact Detection List.

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

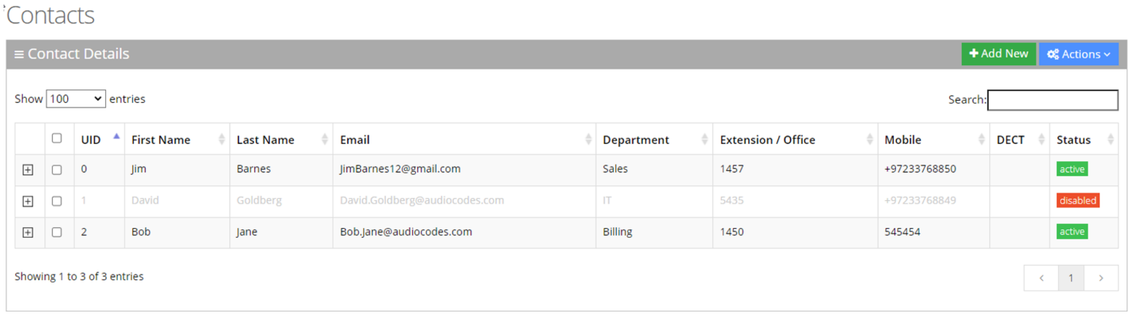
The procedure below describes how to disable a contact.

➢ To disable a contact:

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

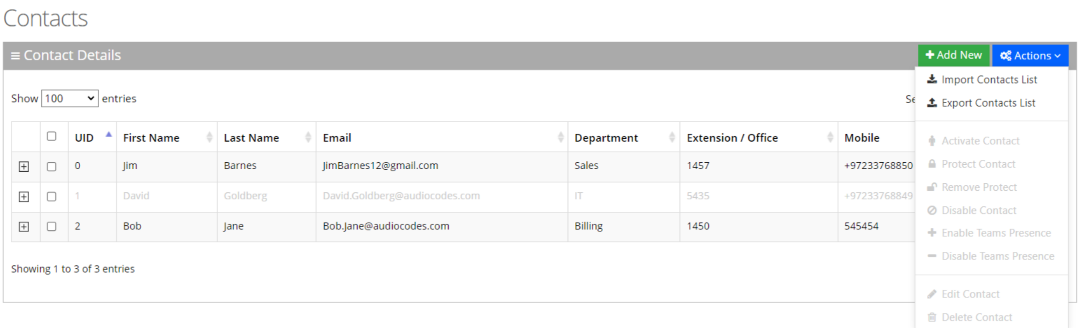


4. The status is set to "disabled" as shown in the figure below:



Importing and Exporting Contact List

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

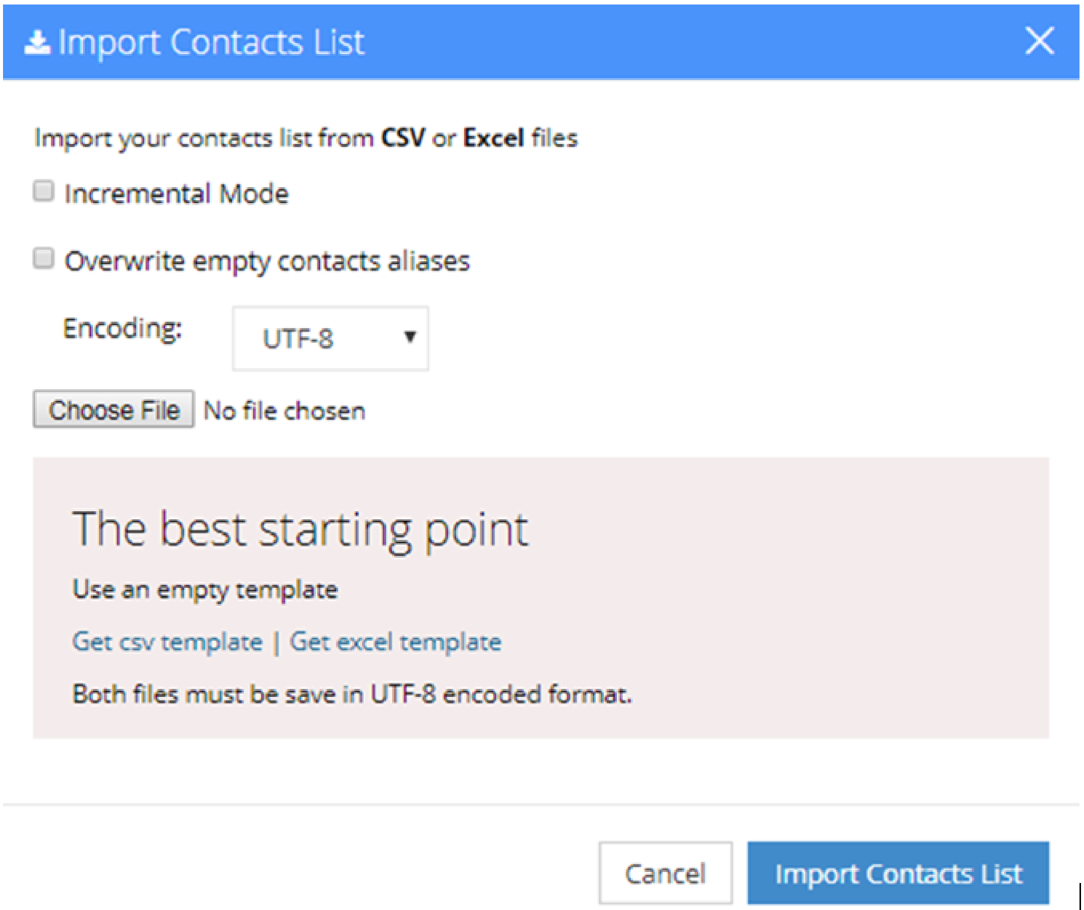


Importing Contact Information

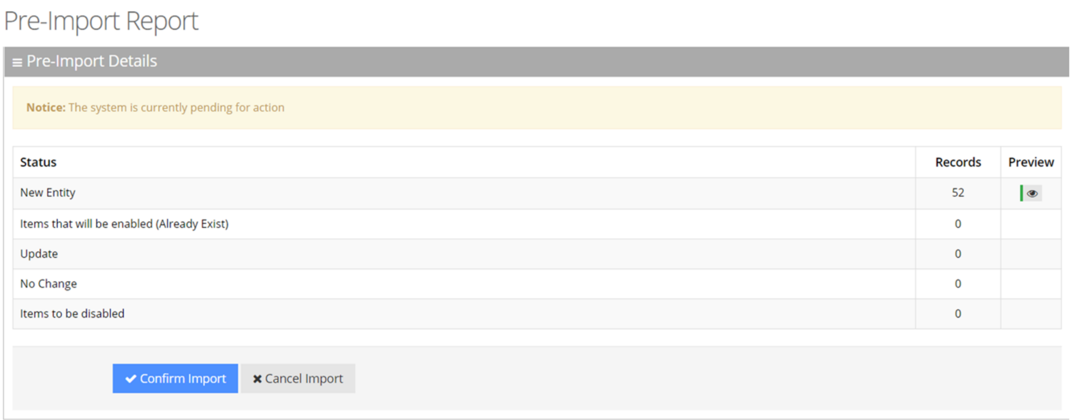
The procedure below describes how to import Contact information.

➢ To import contact information from a CSV file:

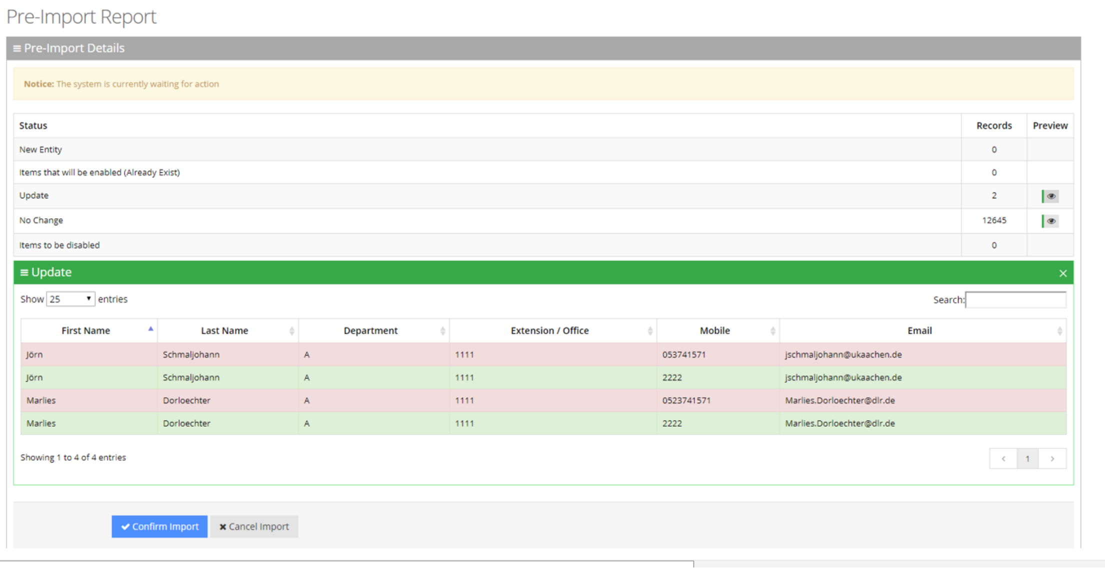
1. From the Actions drop-down list, on the Contact Details screen, click **Import Contacts List**.



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



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

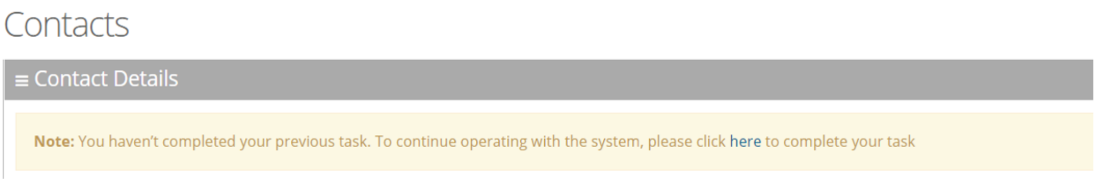


9. Click **Confirm Import** to import the contacts. If you wish to cancel the import process, click **Cancel Import**.

If you do not click **Confirm Import** or **Cancel Import**, or you switch to another tab, the actual import will be pending and all contacts will be disabled.

The same behavior applies for Contacts that have been disabled.

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



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

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

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

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

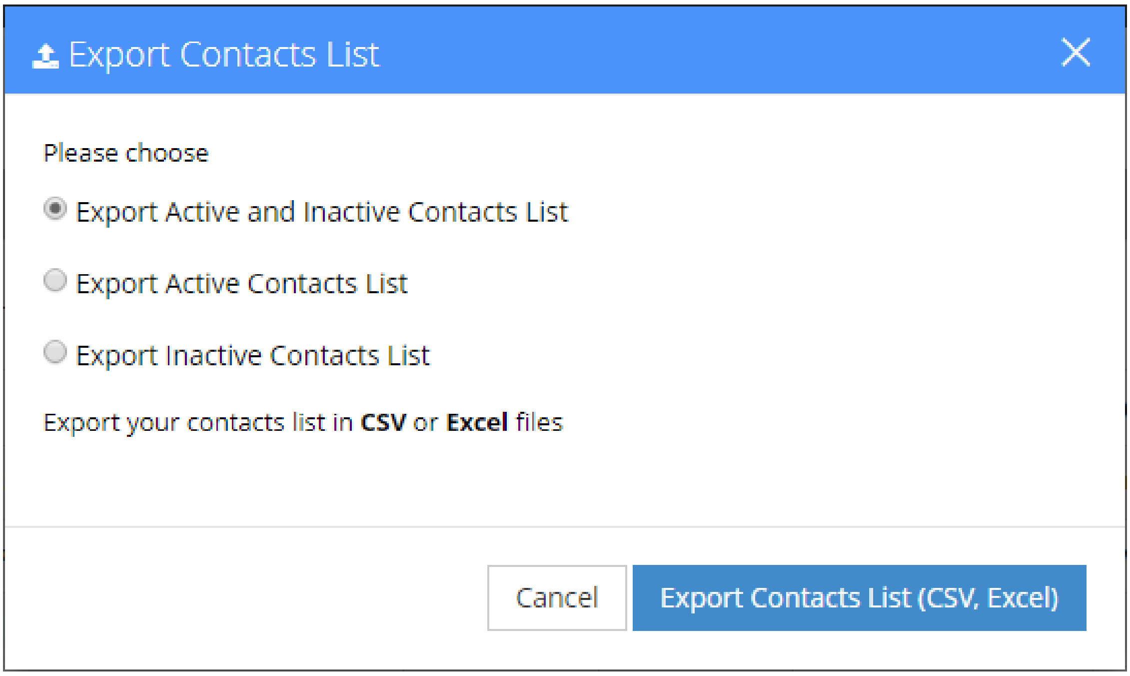
	A	B	C	D	E	F	G	H	I	J
1	UniqueID	FirstName	LastName	Extension	Mobile	Department	Email	FirstName	LastNameAliases	FullNameAliases
2										
3										
4										
5										

Exporting Contact Information

The procedure below describes how to export contact information.

➢ To export contact information:

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



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

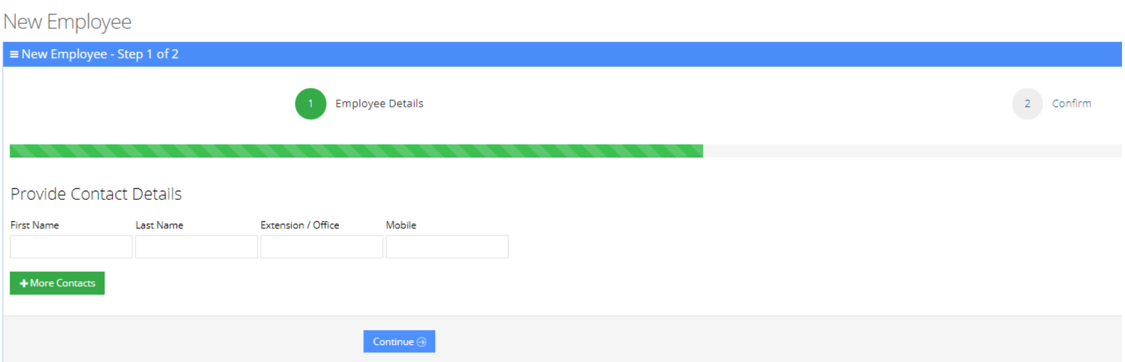
Defining Additional Employees

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

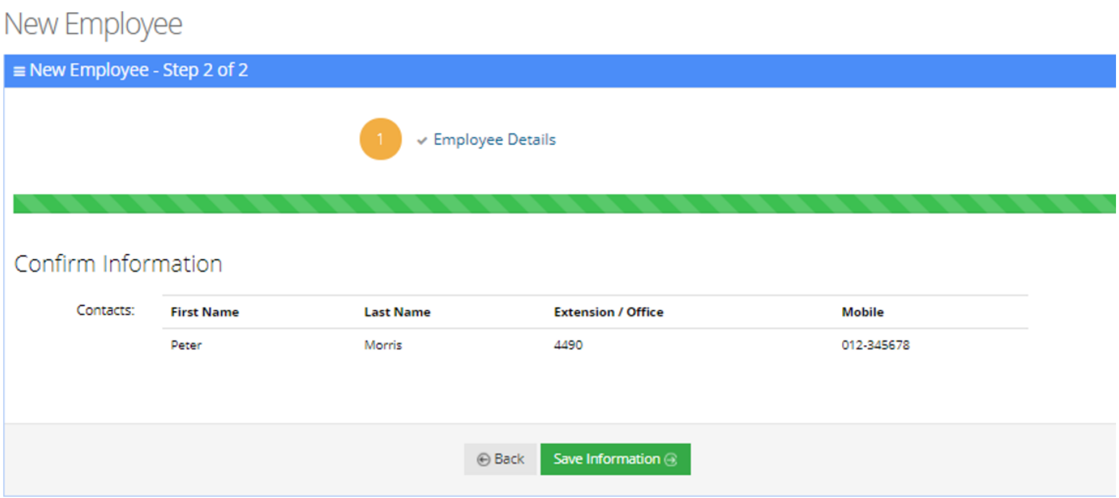
Configuring additional employees allows the organization Administrator to add more contacts which will not be included in the organization's contact list. These additional employees will not be reached through voice dialing, but will be part of the organization and will be provided with employee privileges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

➢ To define the additional employees:

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



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



5. Click **Save Information**.

4 Managing Departments

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

The Administrator can manage the department in the following ways:

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

Using the Dictionary List

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

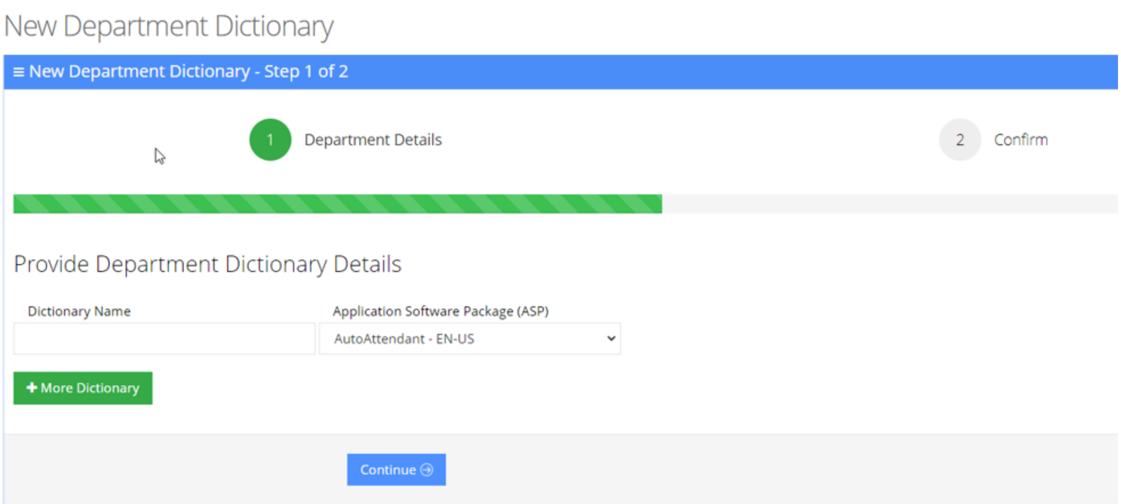
For every tenant/service the "Default" Dictionary List is pre-defined and can't be deleted. It can be used for creating your list or alternatively you can create a new department list with your required name.

Adding Department Dictionary

The procedure below describes how to add a department dictionary.

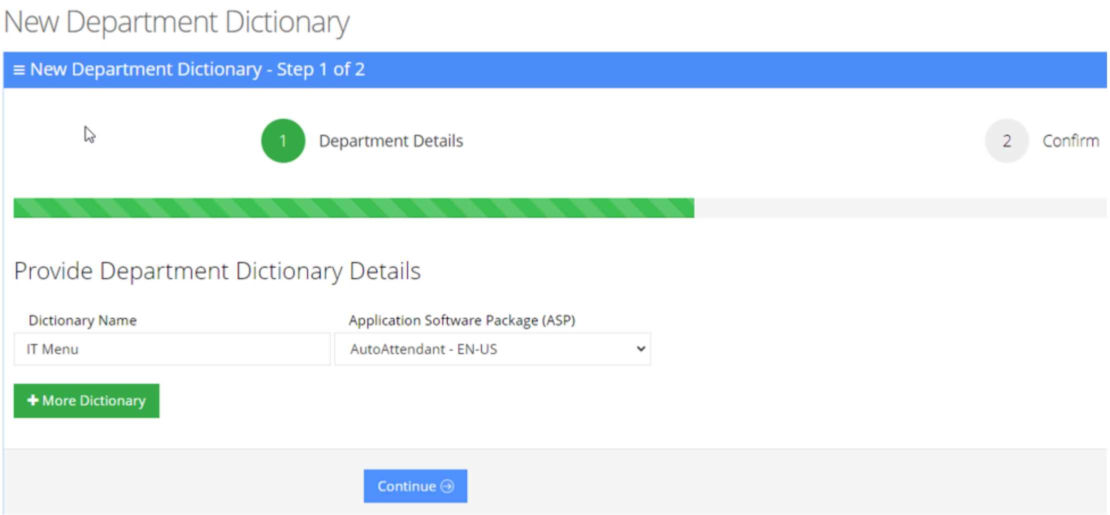
➢ **To add a department dictionary:**

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



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

4. Enter the required fields.



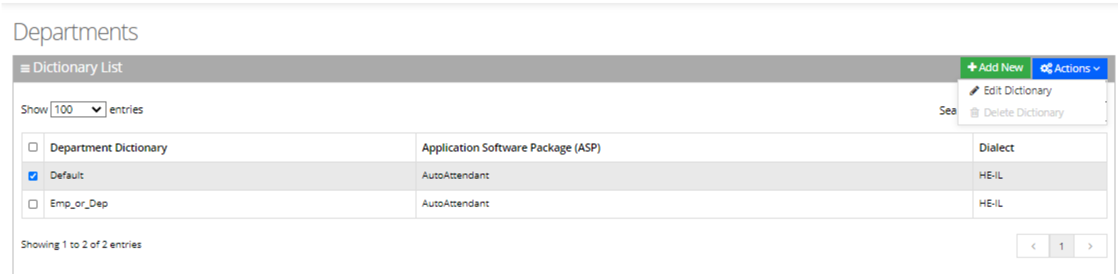
5. Click **Continue**.
6. Click **Save Information**.

Editing Department Dictionary

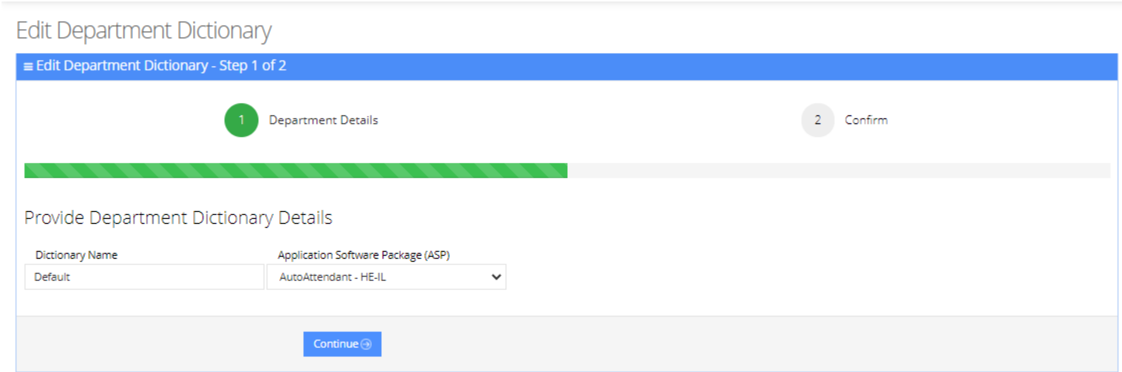
The procedure below describes how to edit a Department dictionary.

➢ To edit a department Dictionary:

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



4. Edit the required fields.



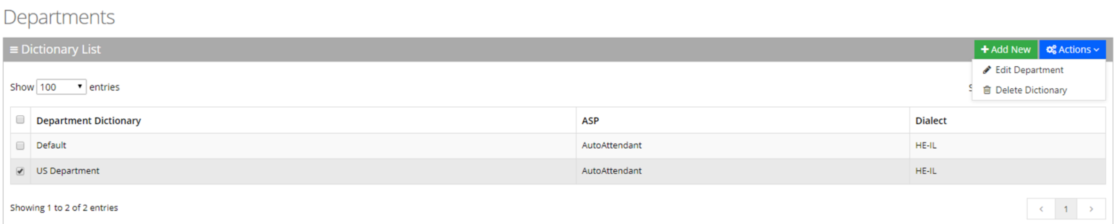
5. Click **Continue**.
6. Click **Save Information**.

Deleting Department Dictionary

The procedure below describes how to delete a department Dictionary.

➢ To Delete a department Dictionary:

1. Open the Department Dictionary menu (**Departments** > **Dictionary List**).
2. Check the Department Dictionary that you wish to Delete.
3. From the drop-down action list select **Delete Dictionary**.

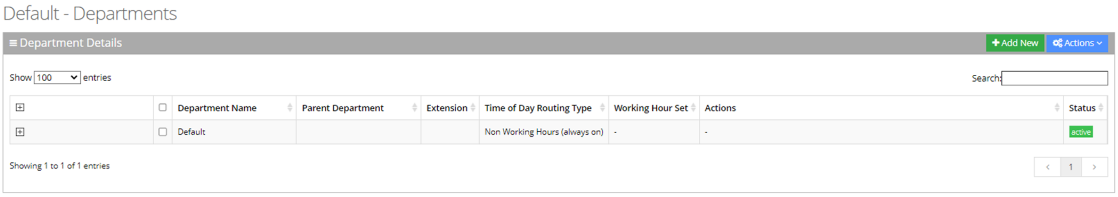


Adding a Department Manually

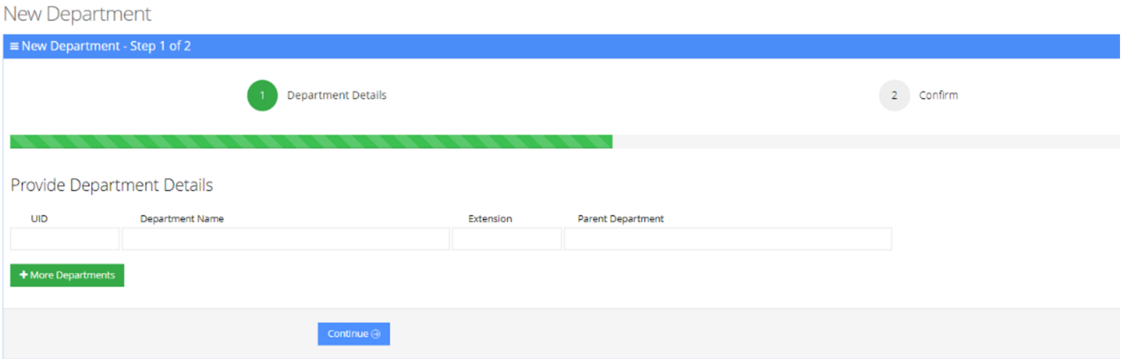
The procedure below describes how to add a department to a specific department Dictionary manually.

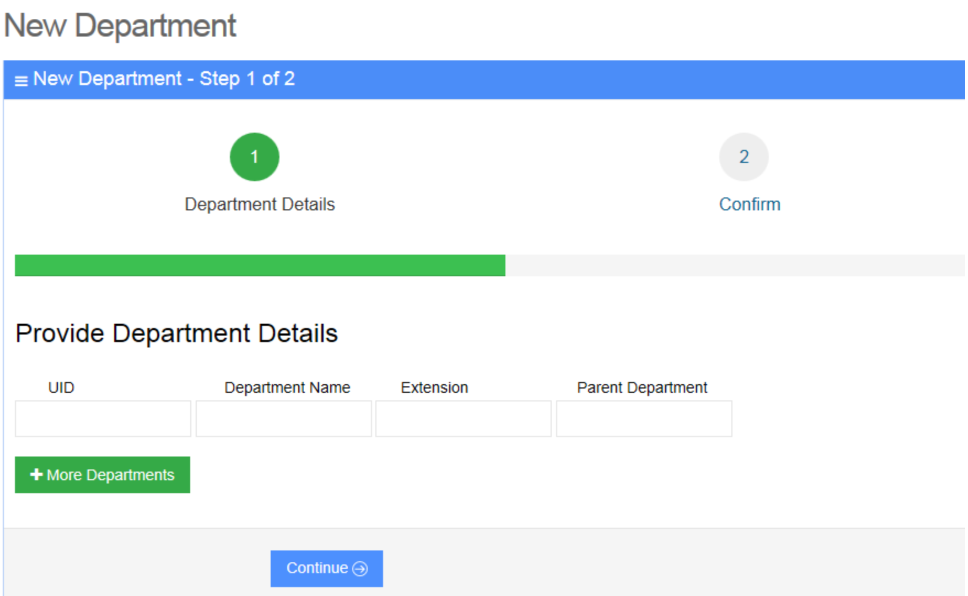
➢ To add a department manually:

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

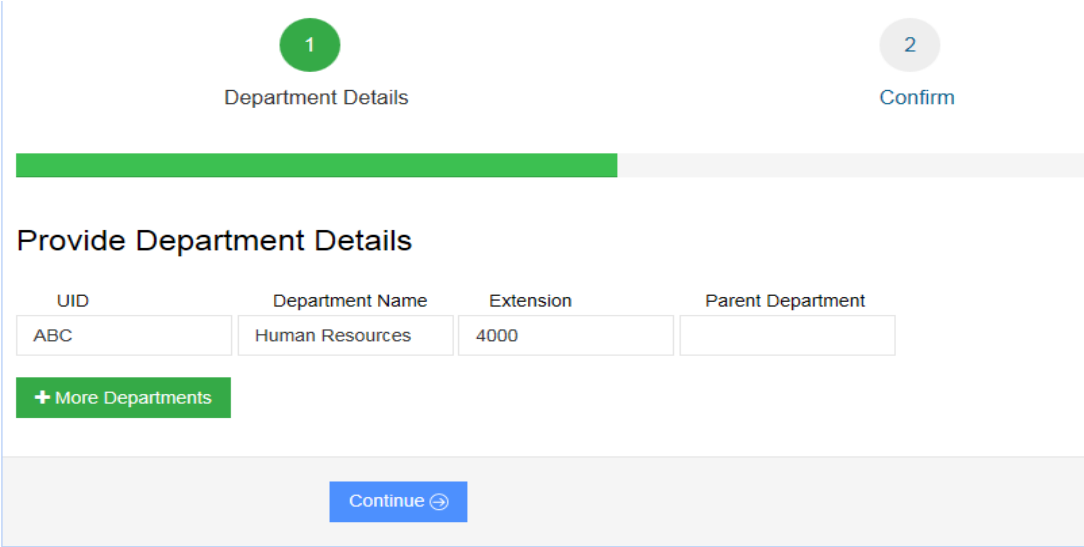


3. Click **Add New;** the following appears:





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



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

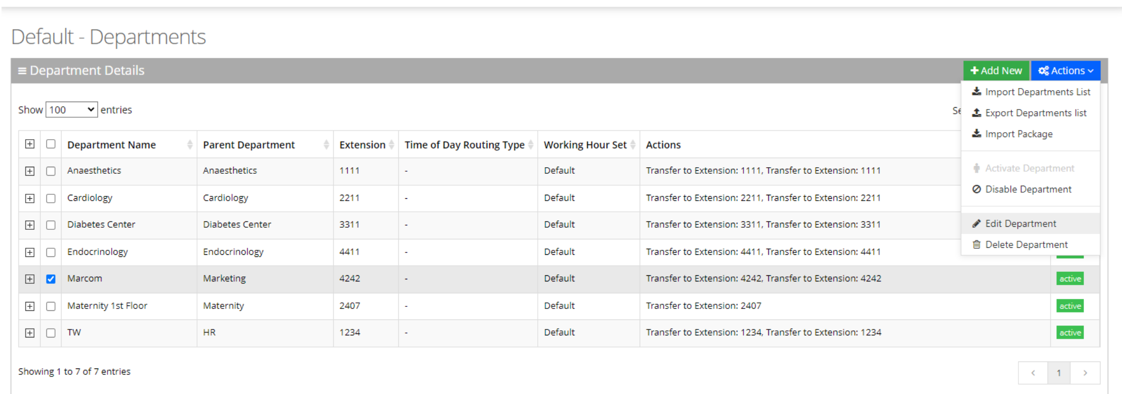
- Every Department must have a unique ID. It can either be a unique number or a name (e.g., ABC123).
- The 'Parent Department' field can be ignored for this step.

Editing a Department

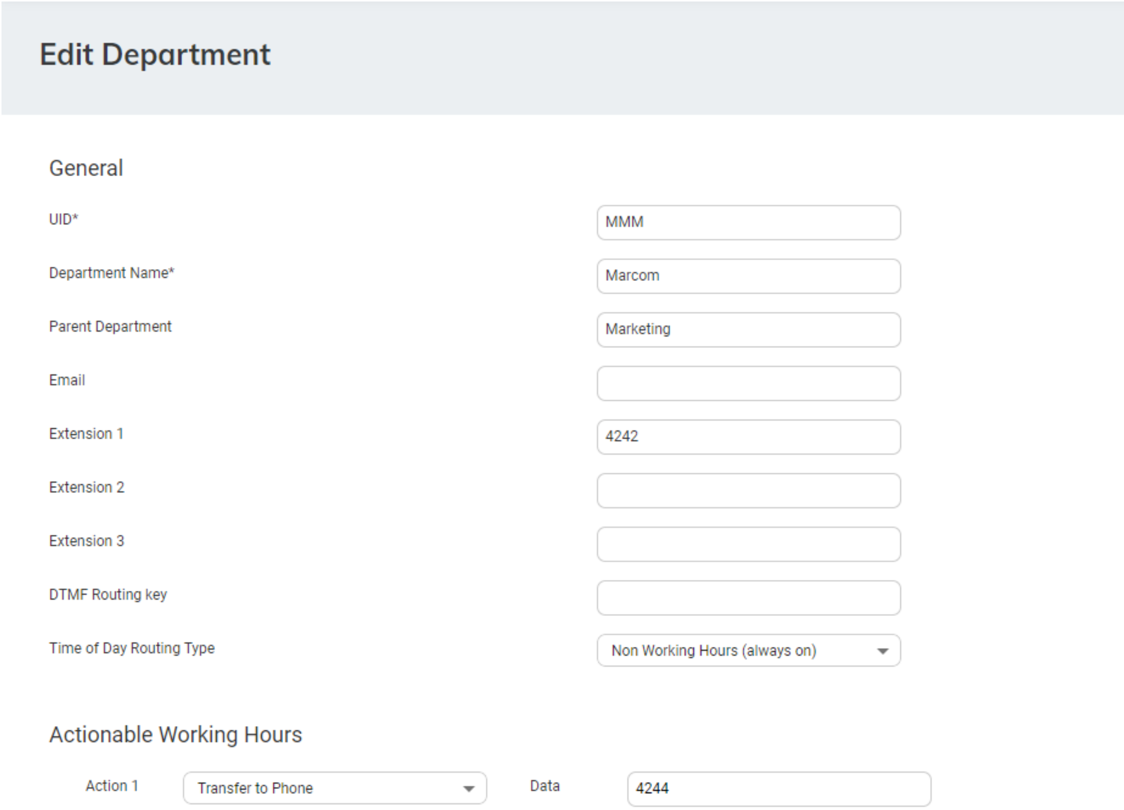
The procedure below describes how to edit a department.

➢ To edit a department:

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



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



5. In the ‘Parent Department’ field, enter additional an name for the selected department. If there is more than one department with the same name, Voca checks for the Parent Department that is configured.

6. In the 'Email' field, enter the main department email address that can be used for sending missed call notifications for that department.

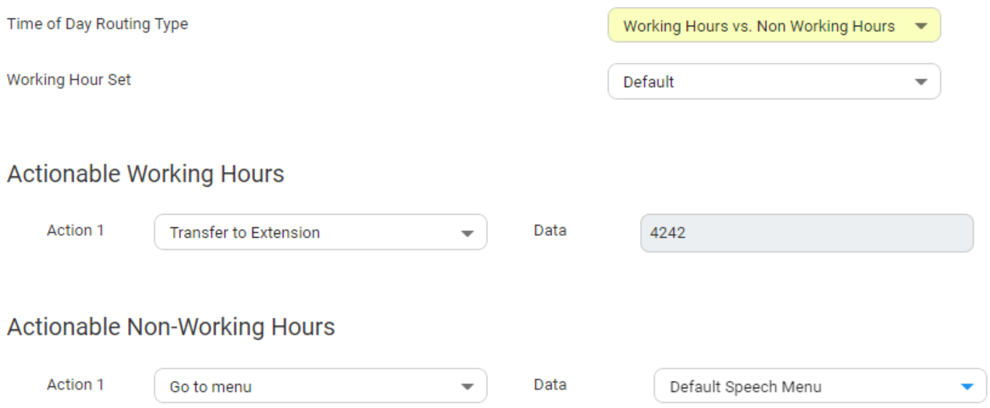
7. In the 'Extension 1/2/3' fields, enter the extension numbers for the department. These extensions might be used if Call Hunting is activated for departments in the Speech menu.

8. In the 'DTMF Routing key' field, enter the DTMF routing key. This key is used to reach this department, when entering this DTMF code during the Speech menu (if **Transfer by DTMF routing key** is enabled in the menu). The key must be unique within the service.

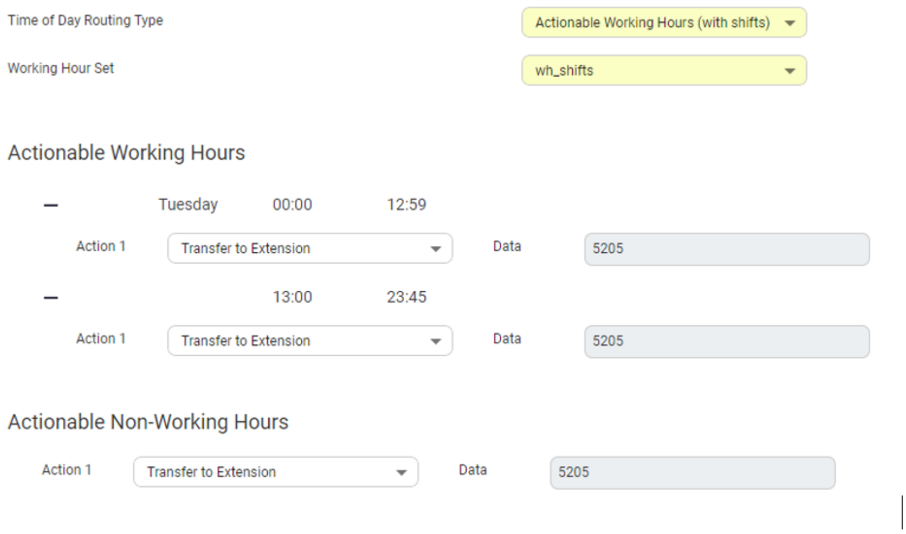
9. The 'Time Of Day Routing Type' drop-down list determines how to handle the incoming call based on working hours. There are three possible options:

   - If you select **Working Hours (always on)**, all incoming call, regardless of any working hours, are always handled according to the actions selected.

   - If you select **Working Hours Vs Non Working Hours**, calls are handled based on working hours. When selecting this option, a Working Hours Set should be selected. Actions will be configured for actionable working hours and for actionable Non-working hours.

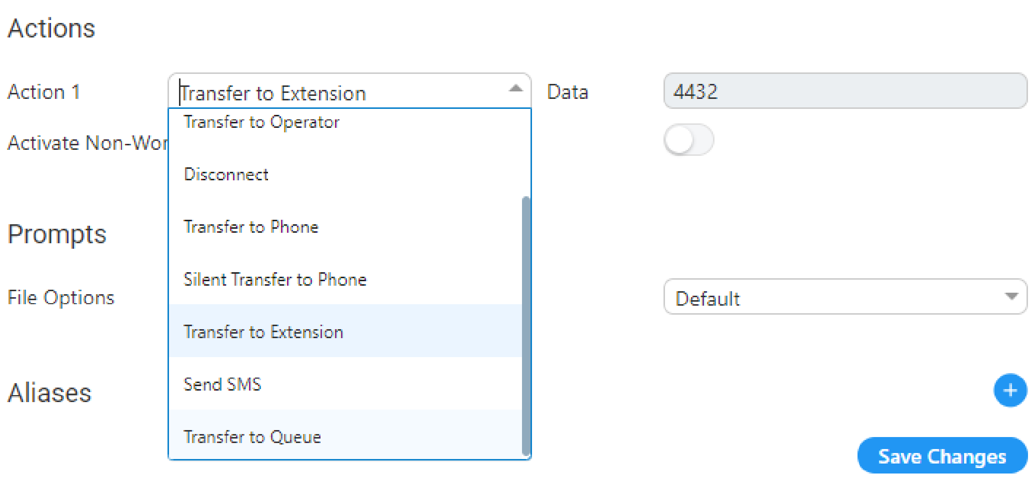


- If you select **Actionable Working Hours (with shifts)**, calls are handled based on working hours. When selecting this option, a Working Hours Set should be selected. All shifts defined in that set will be displayed and for each working hour shift.



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

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



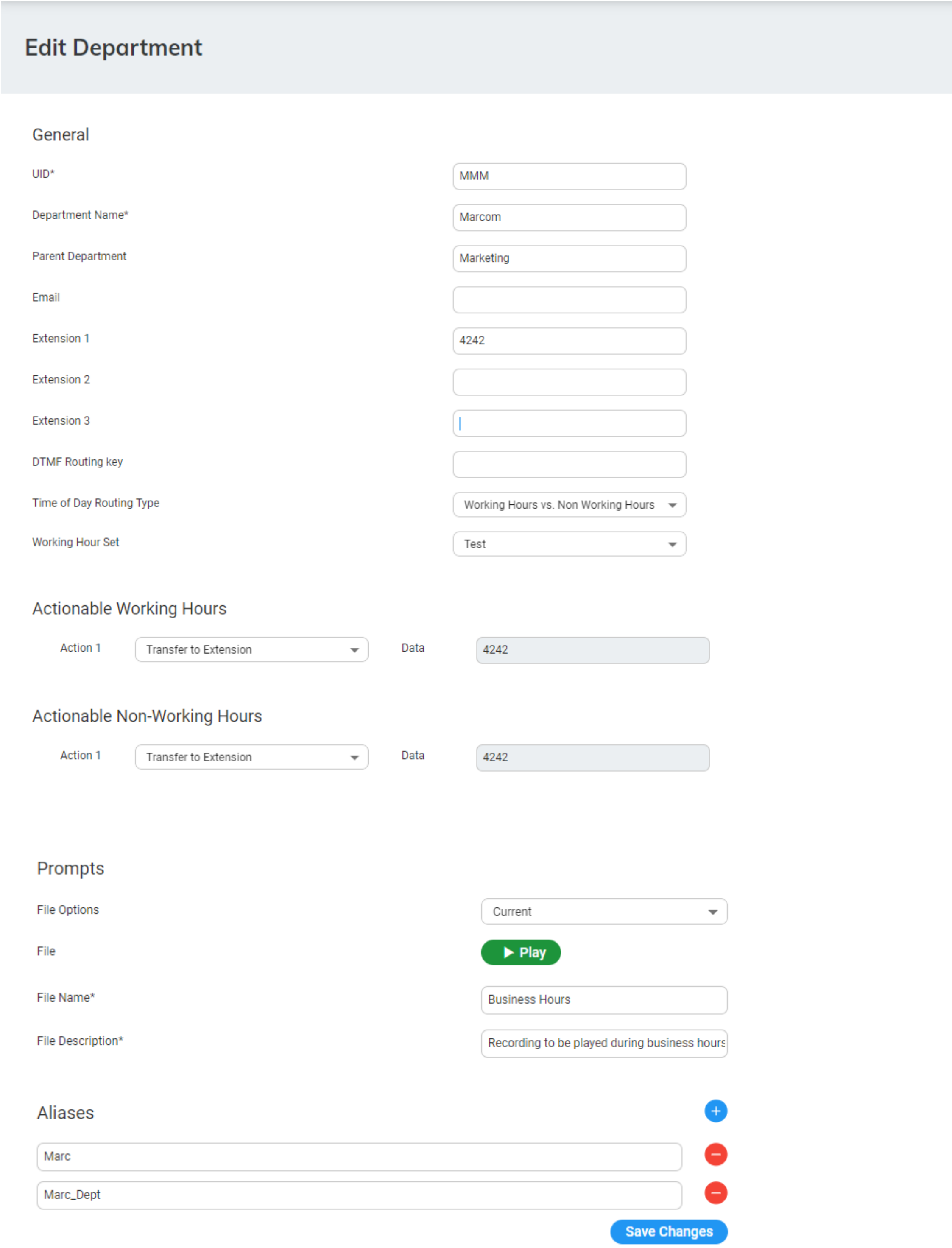
11. In the 'Action1 Data' field, enter the related action data for the 'Action 1' field. For more information of the possible Actions, see Actions.
12. Make your changes, and then click **Save Changes**.

Configuring Department Prompts

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

➢ To use the default department prompt:

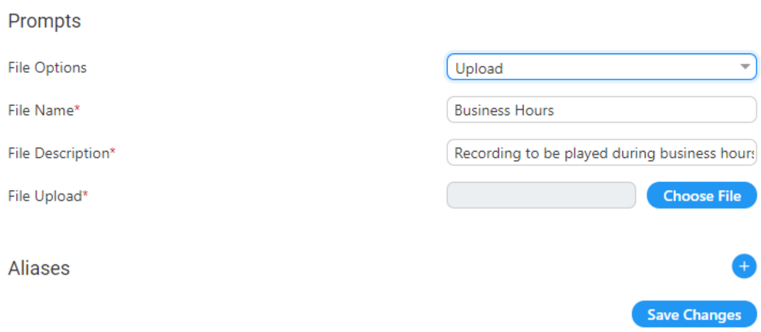
1. Open the Department menu and click on the required department (**Departments** > **{department Dictionary name}**).
2. Click on the **Department List** menu.
3. Select the department you wish to edit by selecting the **Department** check box.
4. From the ‘Actions’ drop-down list, select **Edit Department**;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



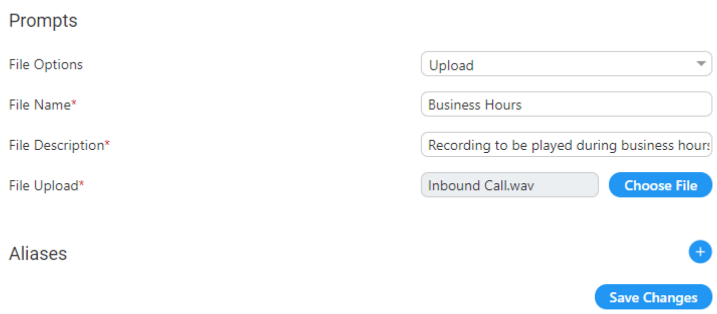
5. Under the **Prompts** group, select 'default' to use a pre-existing prompt.

➢ To upload a prompt:

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



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

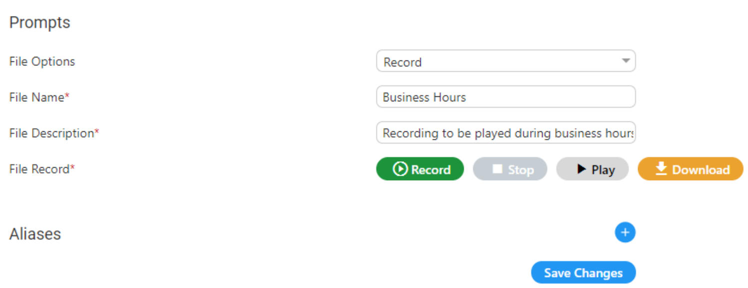


5. Click **Save Changes** to complete the upload process. A 'department Successfully Updated' message appears.

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

➢ To record a prompt:

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



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

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

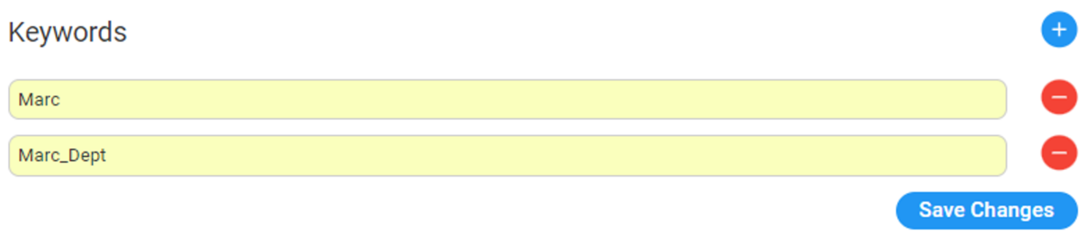
Creating Keywords for a Department

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

➢ **To create a keyword for a department:**

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

6. Enter the keyword name(s).



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

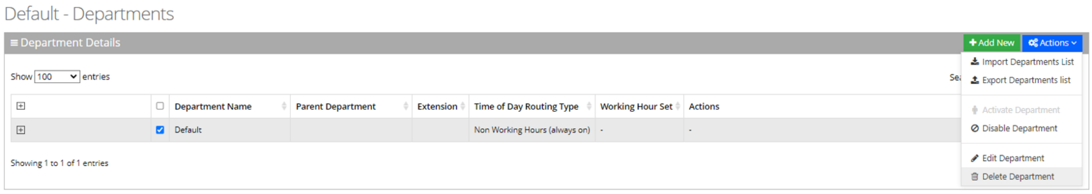
Deleting a Department

The procedure below describes how to delete a department.

➢ **To delete a department:**

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

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



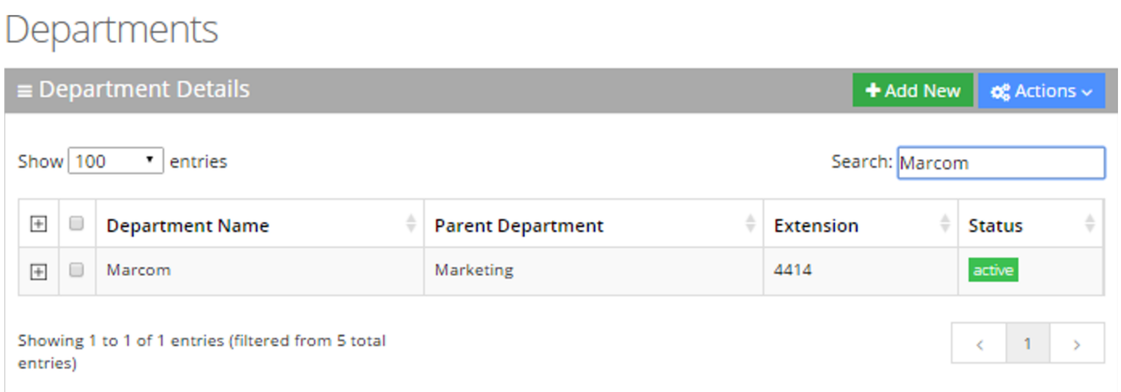
5. The following message appears: 'Are you sure you want to delete the selected department (s)?'
6. Click **OK** to delete the selected department.

Searching a Department

The procedure below describes how to search for a department.

➢ To search for a department:

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



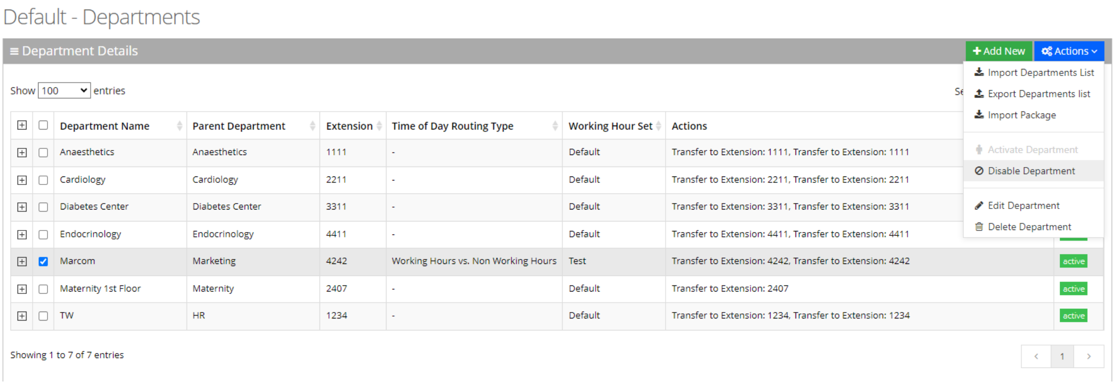
Disabling a Department

The procedure below describes how to disable a department.

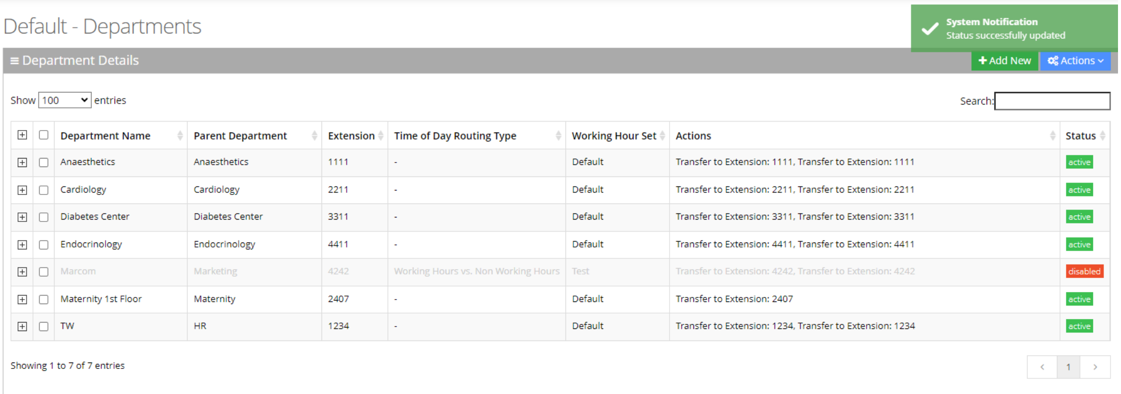
➢ To disable a department:

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

3. Select the department you wish to disable by selecting the **Department** check box.
4. From the ‘Actions’ drop-down menu, choose **Disable Department**.



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

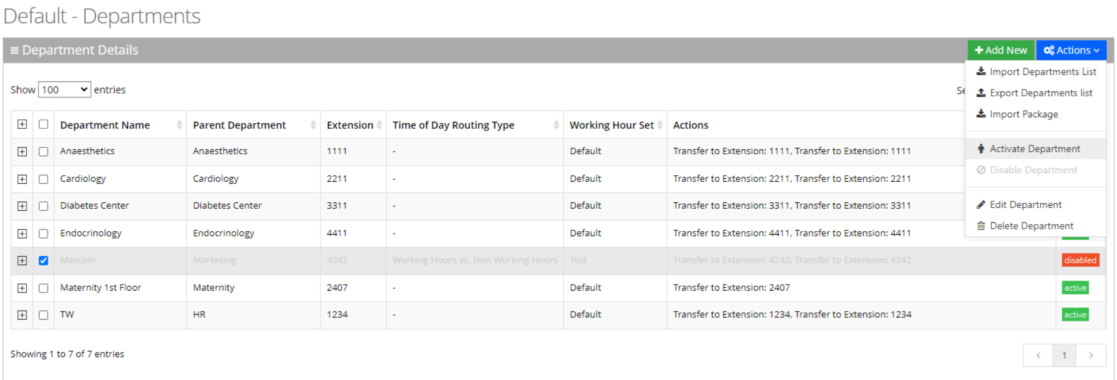


Activating a Department

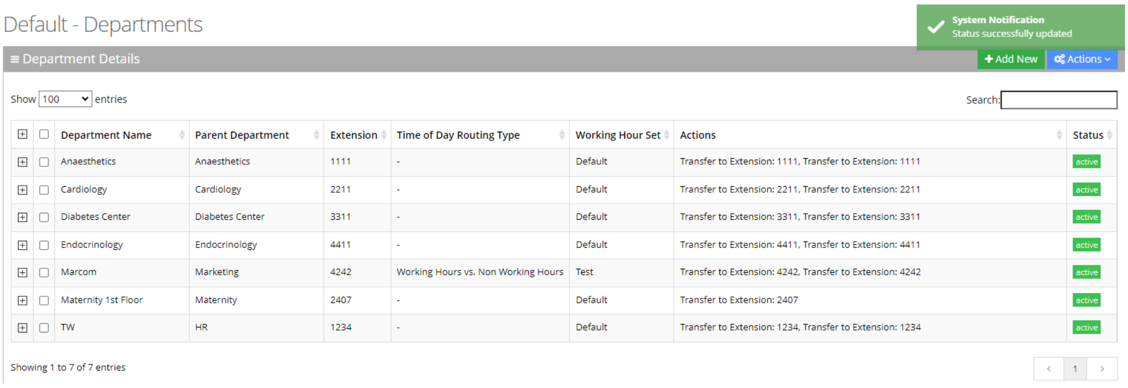
The procedure below describes how to activate a department.

➢ 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**.

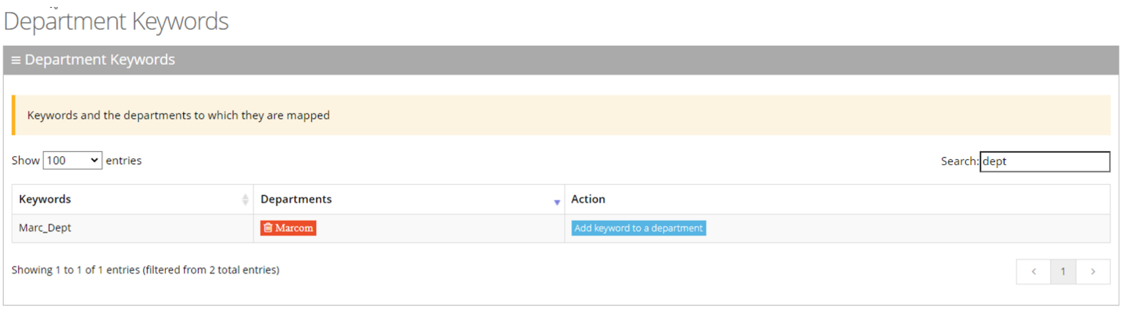


5. The disabled department appears with a green status of "active", as shown below.



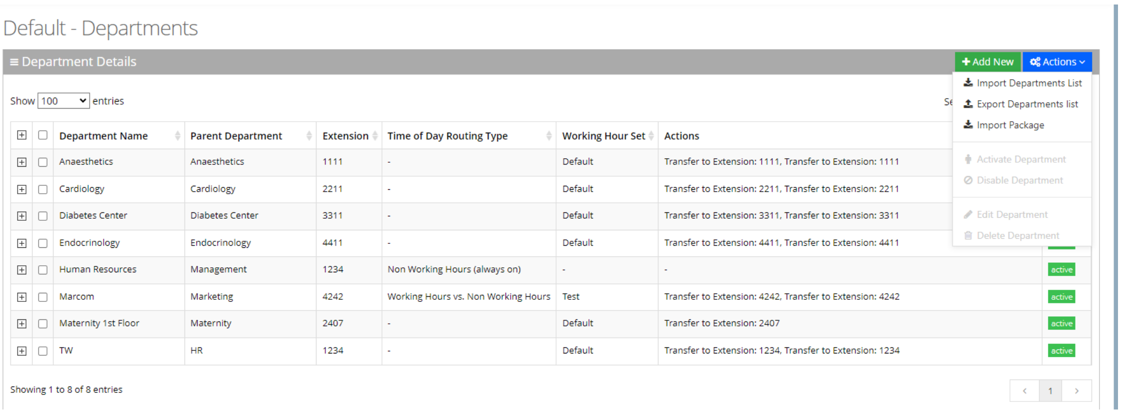
Searching for a Keyword

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



Importing/Exporting Department List

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

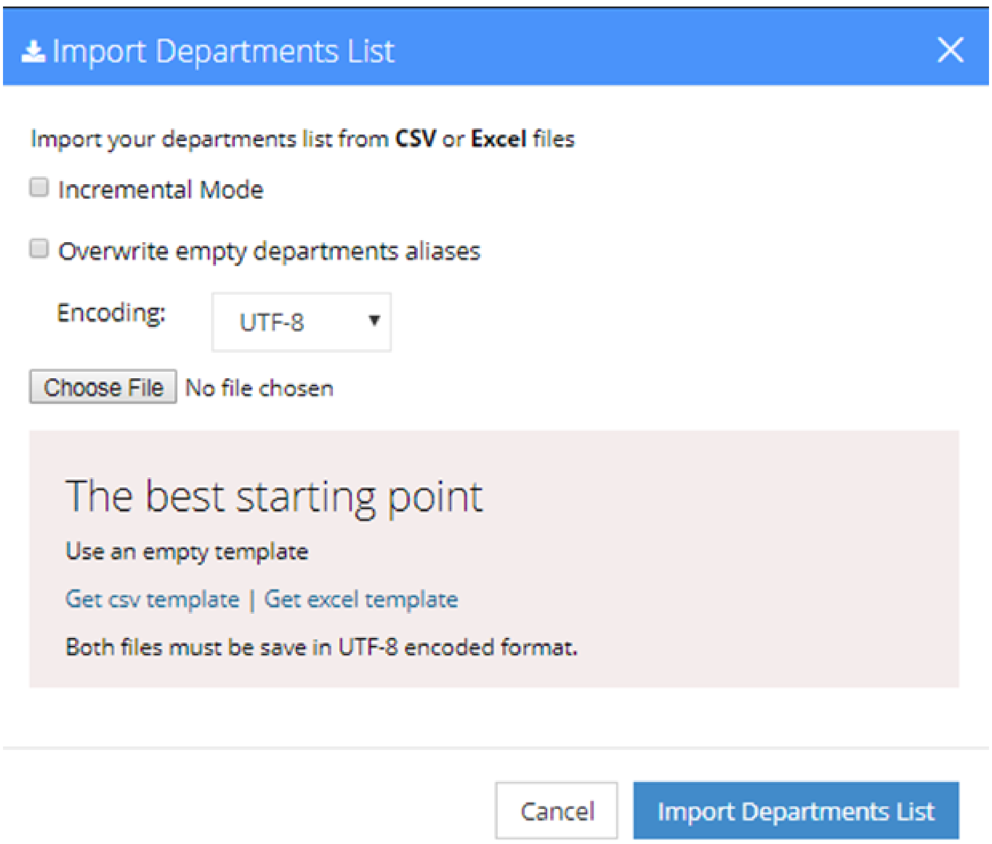


Importing Department Information

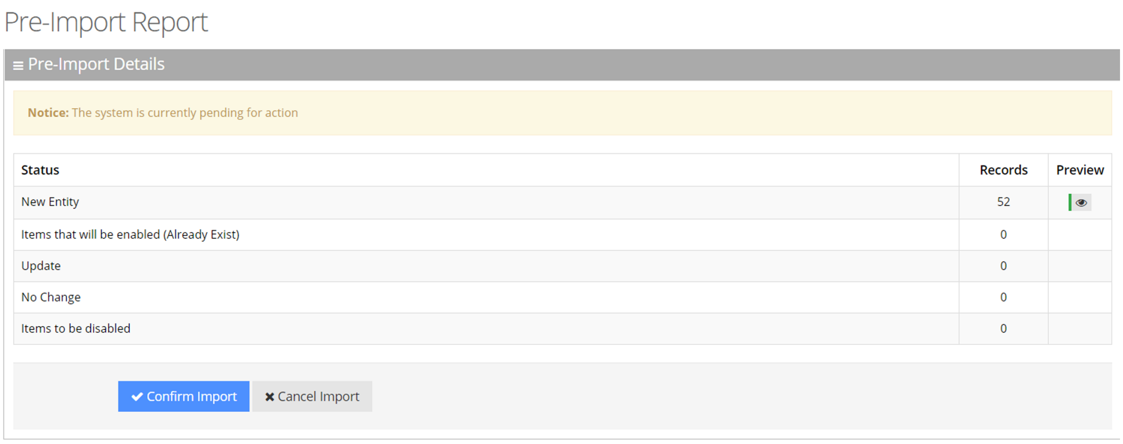
The procedure below describes how to import department information.

➢ To import department information:

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



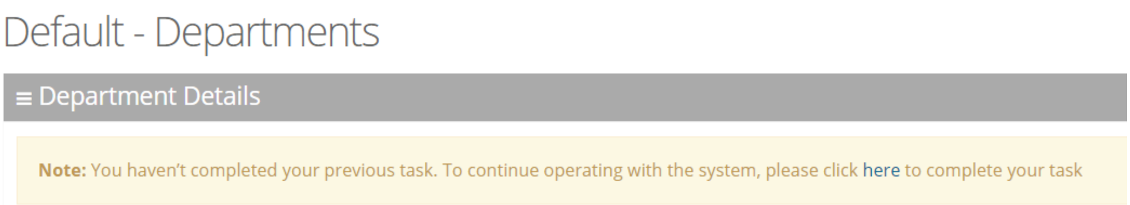
4. If you select the 'Incremental Mode' check box, only the records that you are importing are activated in your Departments List. All pre-existing records are disabled.
5. If you select the 'Overwrite empty departments aliases' check box, all empty departments aliases in the imported file are overwritten.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



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

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

    If you do not click **Confirm Import/Cancel Import** or switch to another tab, the actual import will be pending and all departments will be disabled. the following appears:



11. You can return to the **Confirm Import** or **Cancel Import** processes by clicking on the **here** link.
12. The CSV to be imported should contain the following:
    - UID (mandatory) - a Department ID or any unique number, name or both need to be entered.
    - Department name
    - Extension number

- Aliases separated by ";"

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

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

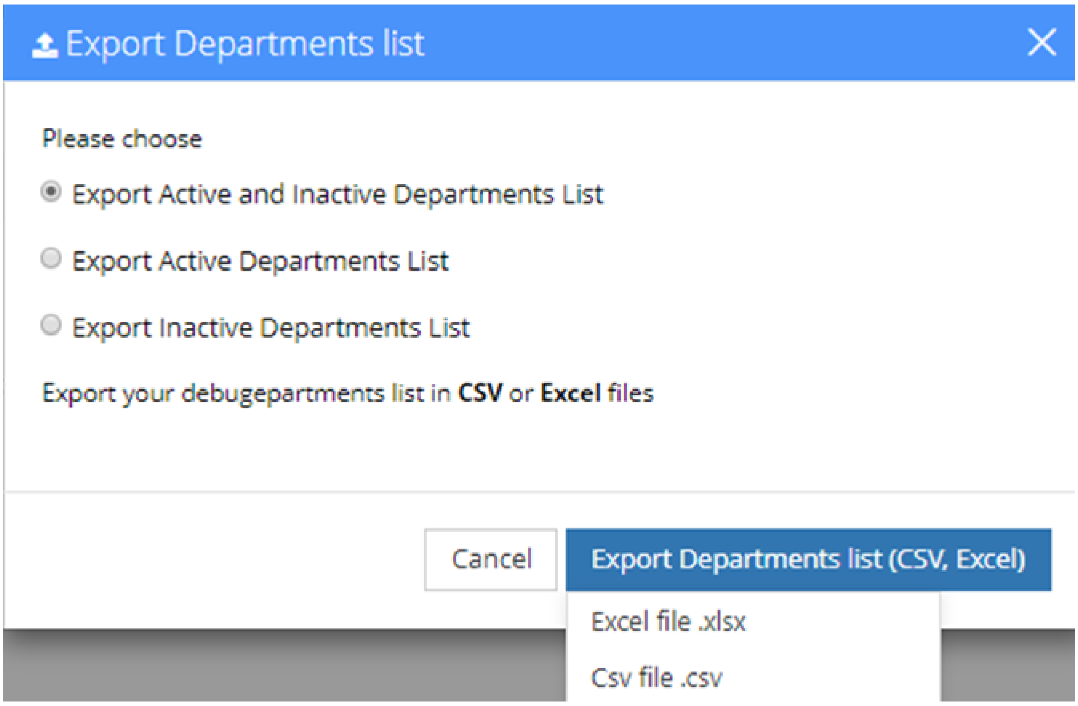
	A	B	C	D
1	UID	Department Name	Extension	Aliases
2				
3				

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

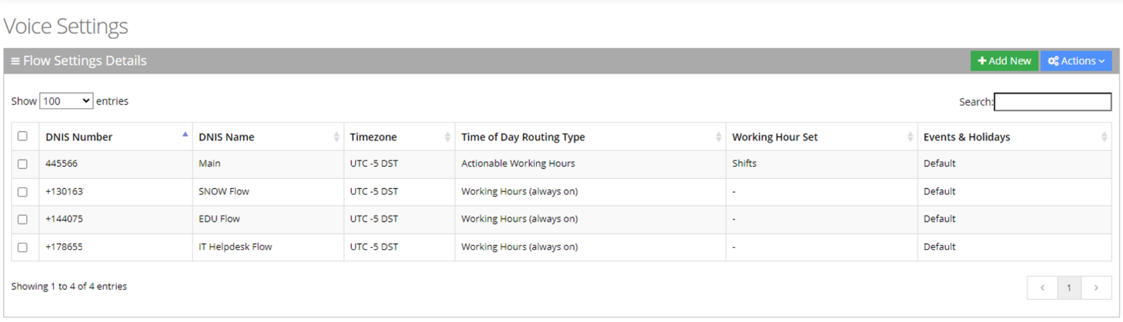
- Configuring Voice Settings below
- Configuring Email Interaction Settings on page 48
- Configuring Chat Interaction Settings on page 53

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.



The Voice Settings page is described below:

- **DNIS Number:** Defines the Access phone number for the IVR service. e.g., 5555

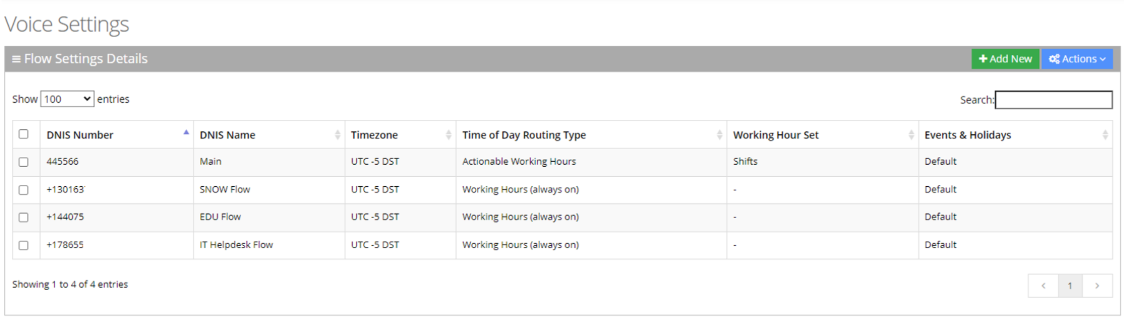
- **DNIS Name:** Defines the name of the IVR service.
- **Timezone:** Defines the timezone associated with the DNIS number. When calling this number, working hours, holidays and events are checked based on the timezone.
- **Time Of Day Routing Type:** Defines how to handle incoming calls based on working 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 149)

Adding a Flow Setting

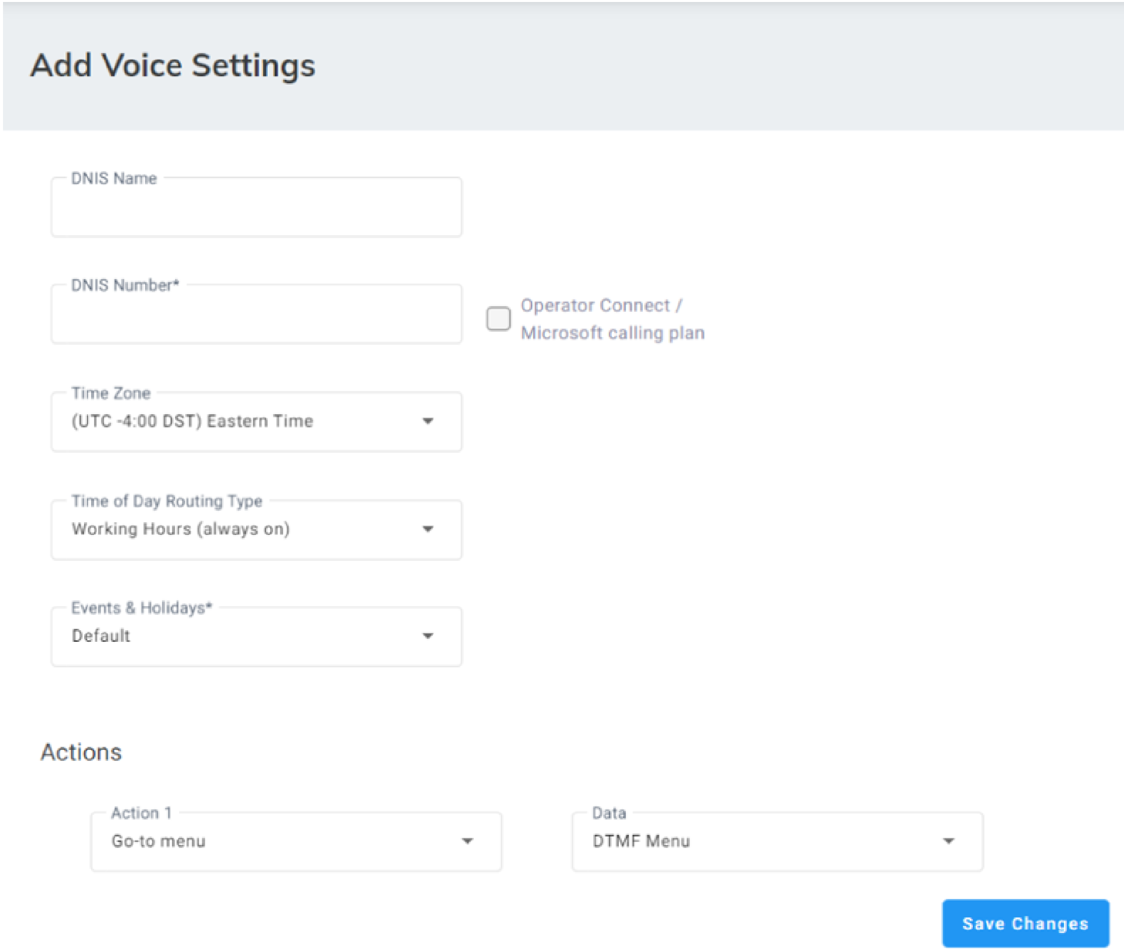
The procedure below describes how to add a flow setting.

➢ To add a flow setting:

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



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



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

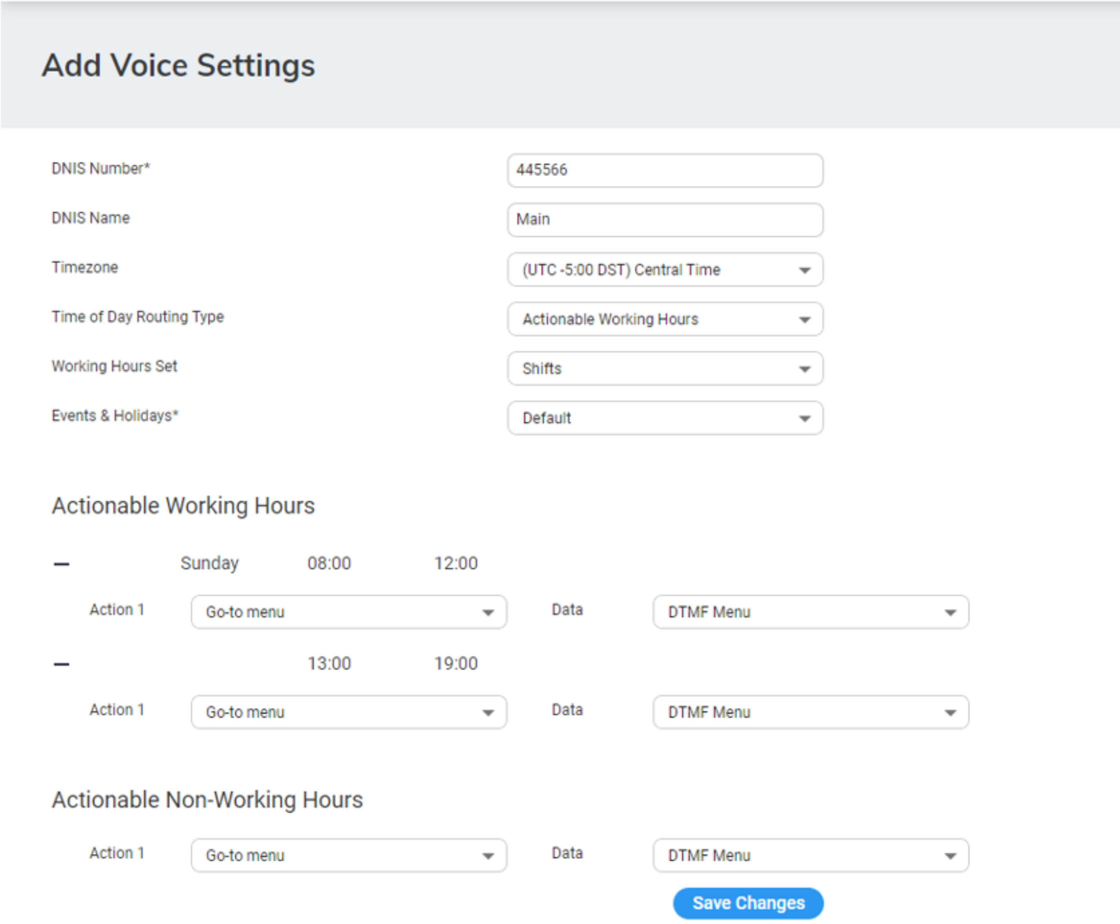
> If you are using Operator Connect or Microsoft calling plan, select the check box. A Microsoft window appears prompting you to enter the designated Microsoft Teams user created for this integration. See Appendix DNIS Number for OC MCP.htm.

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

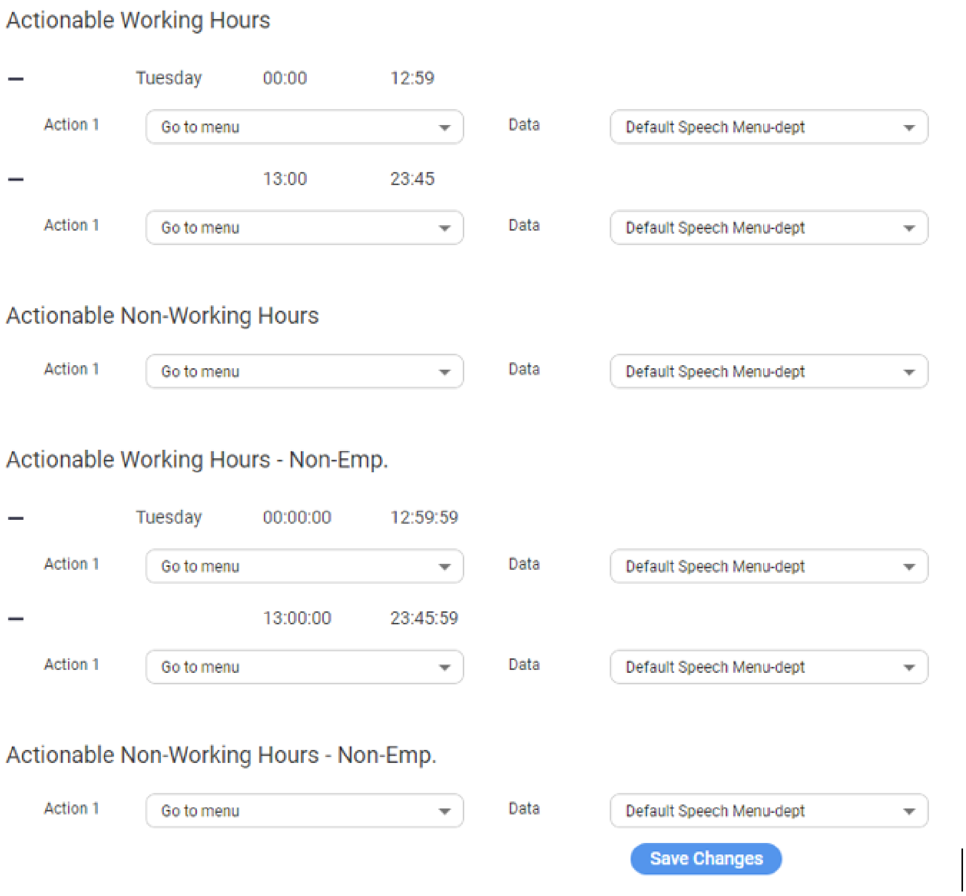
> Events & Holidays actions always take precedence.

- If you select **Working Hours (always on)**, all incoming calls, regardless of any working hours, are always handled according to the 'Actions' configured below.

- If you select **Actionable working hours**, calls are handled based on the working hours. When selecting this option, a Working Hours Set should be selected. All shifts defined in that set are displayed and for each working hour shift, relevant actions can be configured. Relevant actions can be also configured for non-working hours.



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



For more information of the possible Actions, see Actions.

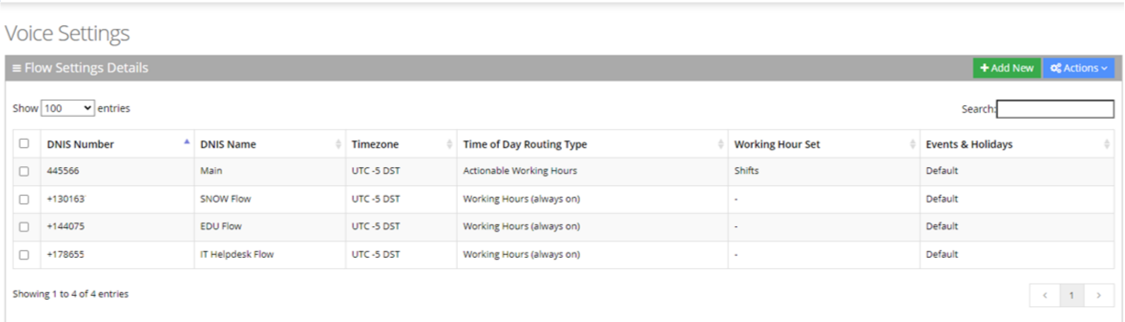
7. Add your details, and then click **Save Changes**.

Editing a Flow Setting

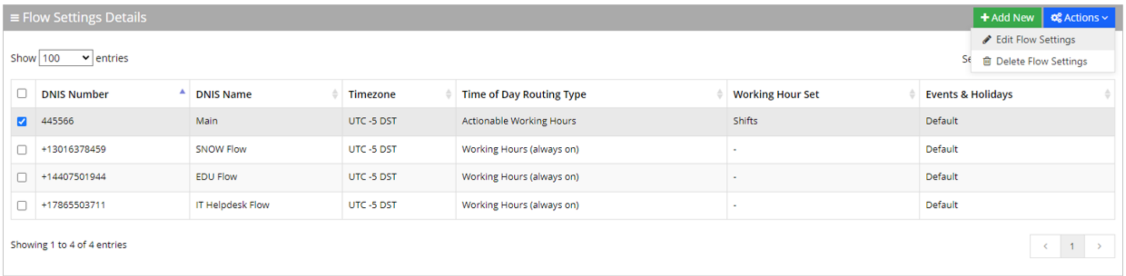
The procedure below describes how to edit Email Interaction Settings.

➢ To edit Flow Settings:

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

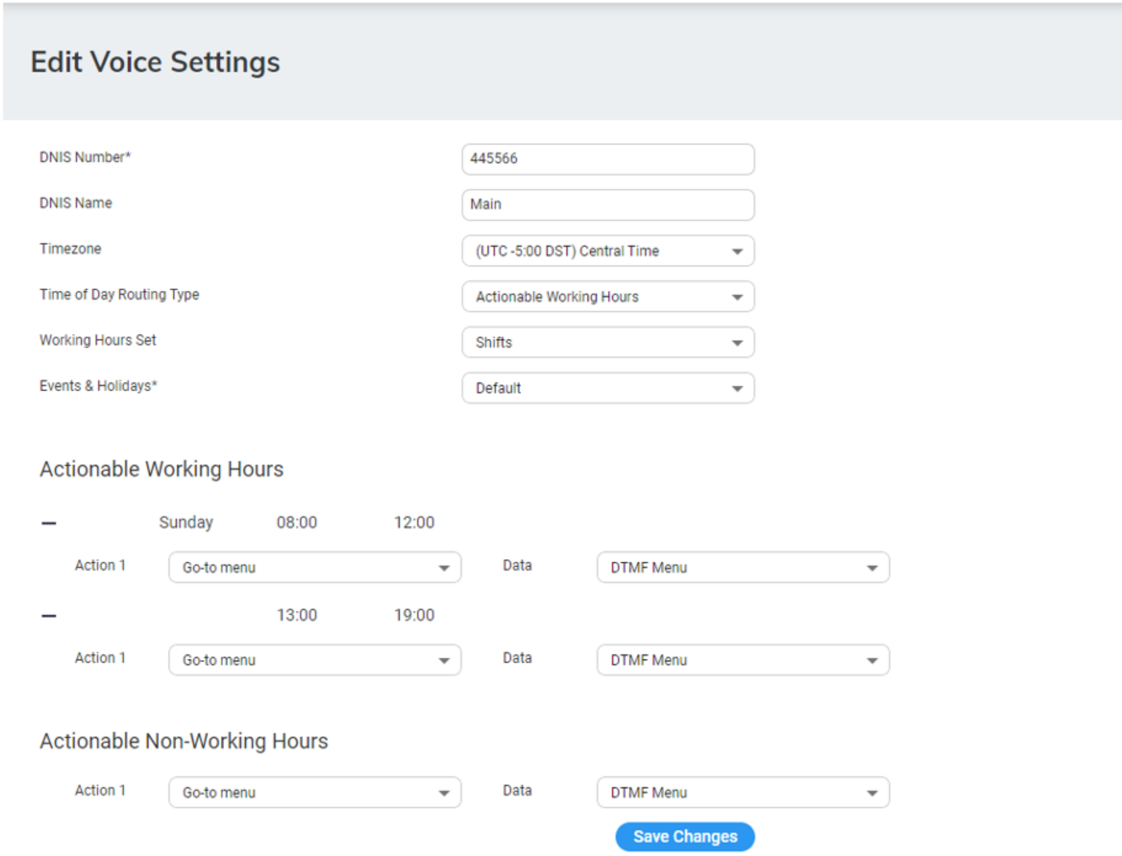


2. Select the voice interaction check box that you want to edit.



DNIS Number	DNIS Name	Timezone	Time of Day Routing Type	Working Hour Set	Events & Holidays
445566	Main	UTC -5 DST	Actionable Working Hours	Shifts	Default
+13016378459	SNOW Flow	UTC -5 DST	Working Hours (always on)	-	Default
+14407501944	EDU Flow	UTC -5 DST	Working Hours (always on)	-	Default
+17865503711	IT Helpdesk Flow	UTC -5 DST	Working Hours (always on)	-	Default

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



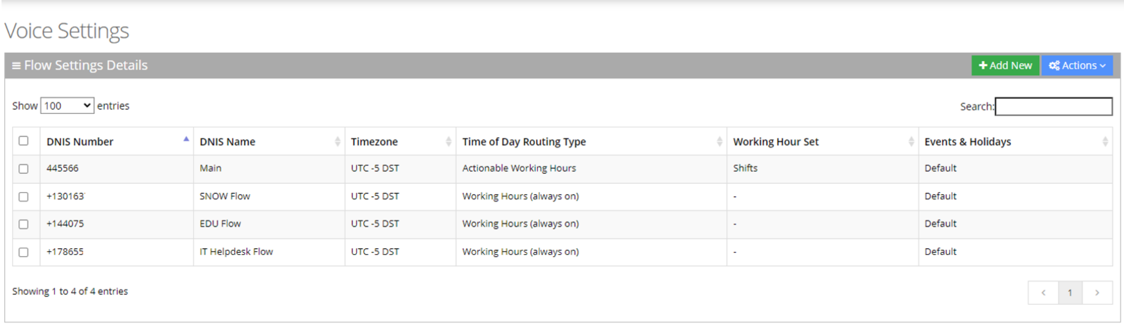
4. Edit the fields you want to change.
5. Click **Save Changes**.

Deleting a Flow Setting

The procedure below describes how to delete a Flow setting.

➢ To delete a Flow setting:

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



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.

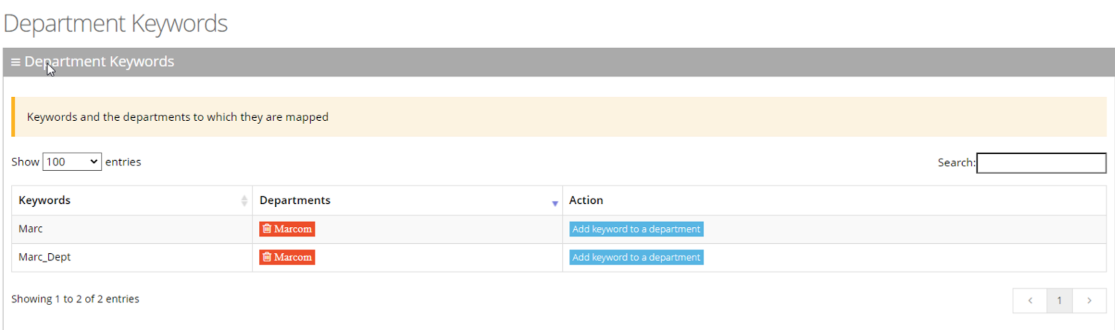
Keyword to Department Mapping

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}**).

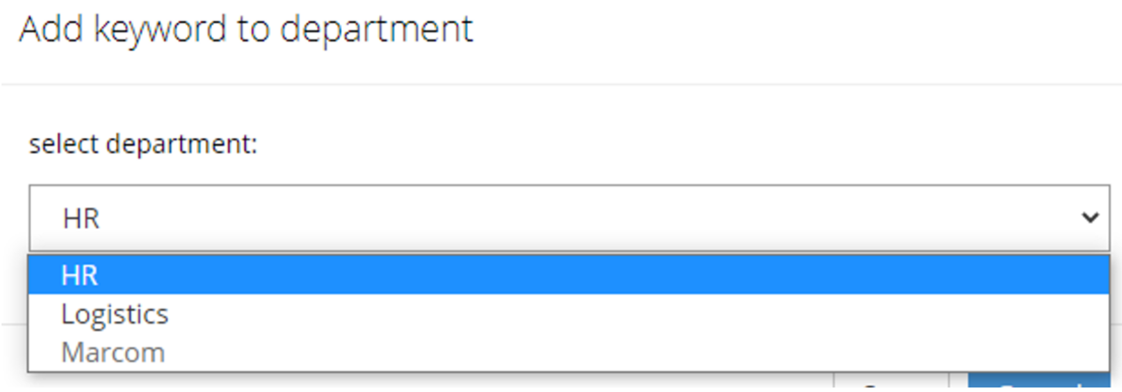
2. Click on the **Department Keywords** menu.



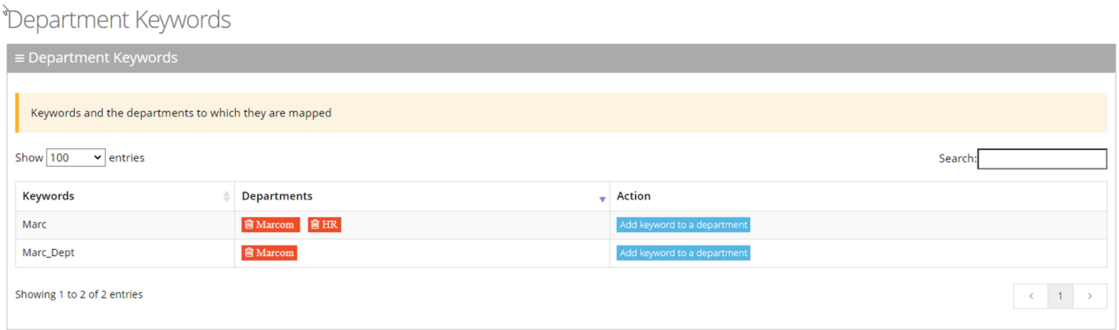
3. Place the cursor on the keywords that you wish to have the department mapped to.

4. In the **Action** column, click the Add keyword to a department button.

5. From the **Department** drop-down list, select the department you wish to map to the alias.

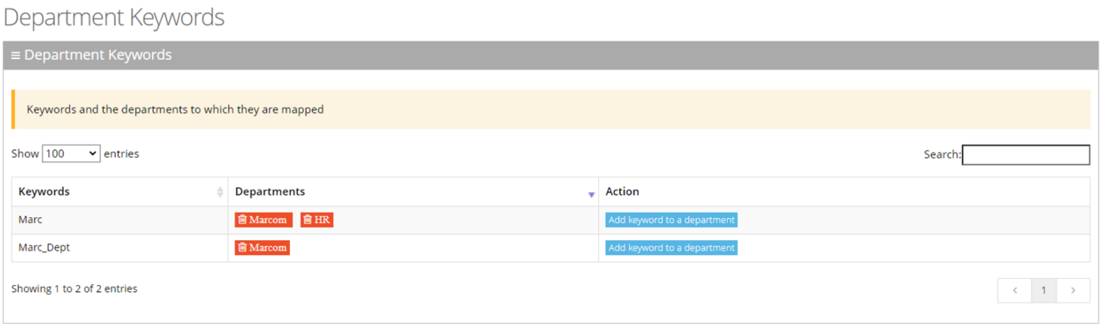


6. Click **Save**; In our example, **HR** was added to the Marc keywords name.



➢ To delete an Alias from a Department:

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



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

4. Click **OK**.

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.

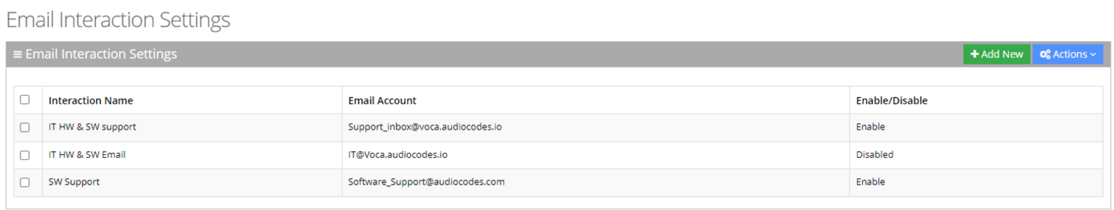
Email settings are available for Digital Engagement Tenants.

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

	Interaction Name	Email Account	Enable/Disable
☐	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable
☐	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled
☐	SW Support	Software_Support@audiocodes.com	Enable

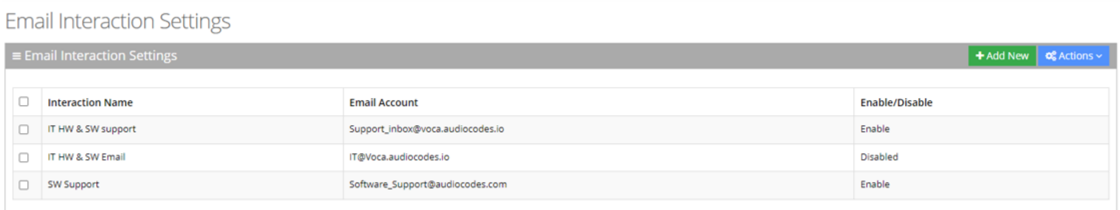
- 'Interaction Name': Defines the name of the Email interaction.
- 'Email Account': Defines the email account for the interaction.
- Enable / Disable: An enabled interaction pulls emails from the email account into Voca.

Adding Email Interactions

The procedure below describes how to add Email Interaction settings.

➢ To add email Interaction Settings:

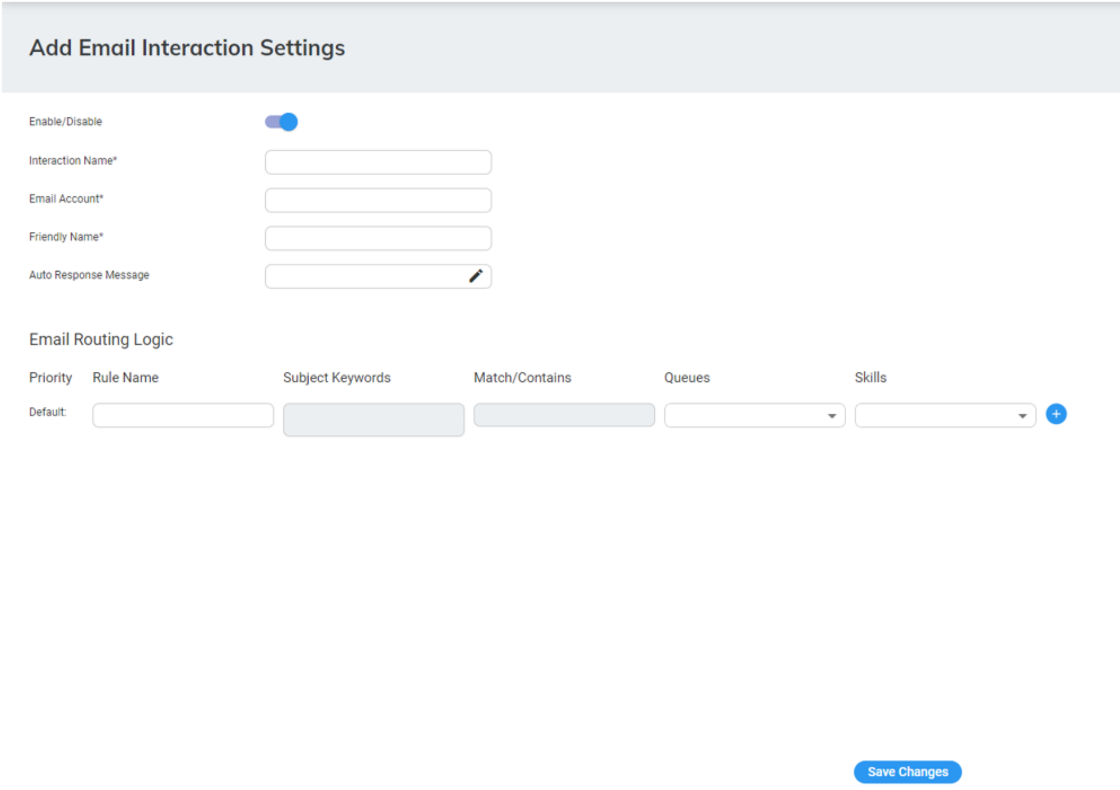
1. Open the Email Settings page (**Configuration** > **Interaction Manager** > **Email**).


Email Interaction Settings

≡ Email Interaction Settings + Add New Actions

	Interaction Name	Email Account	Enable/Disable
☐	IT HW & SW support	Support_inbox@voca.audiocodes.io	Enable
☐	IT HW & SW Email	IT@Voca.audiocodes.io	Disabled
☐	SW Support	Software_Support@audiocodes.com	Enable

2. Click **Add New**.



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 165), configure the following PowerShell commands on the customer's Azure tenant to enable email interaction with a specific email mailbox:

```
Connect-ExchangeOnline -Organization
```

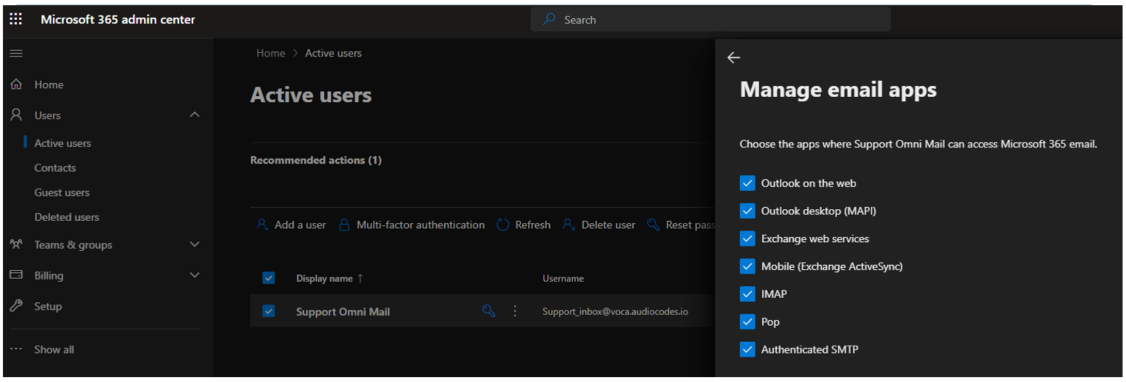
The following command is a one-time configuration; there is no need to configure it again if it has been configured before:

```
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:

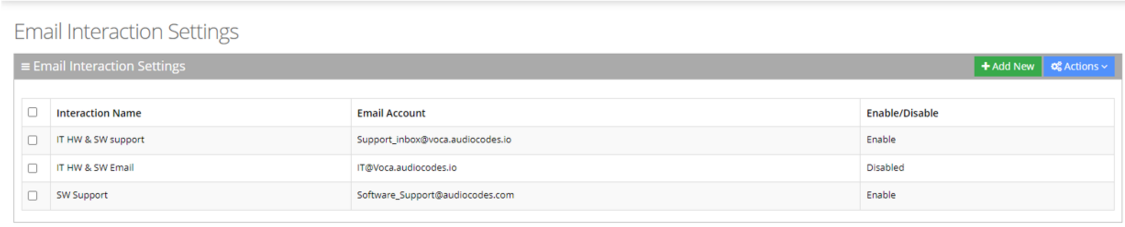


Editing Email Interaction Settings

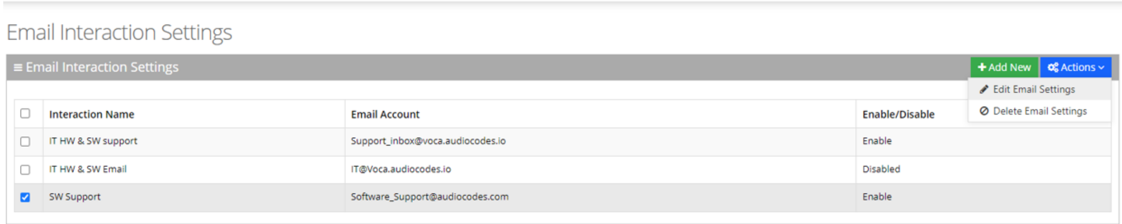
The procedure below describes how to edit Email Interaction Settings.

➢ To edit Email Interaction Settings:

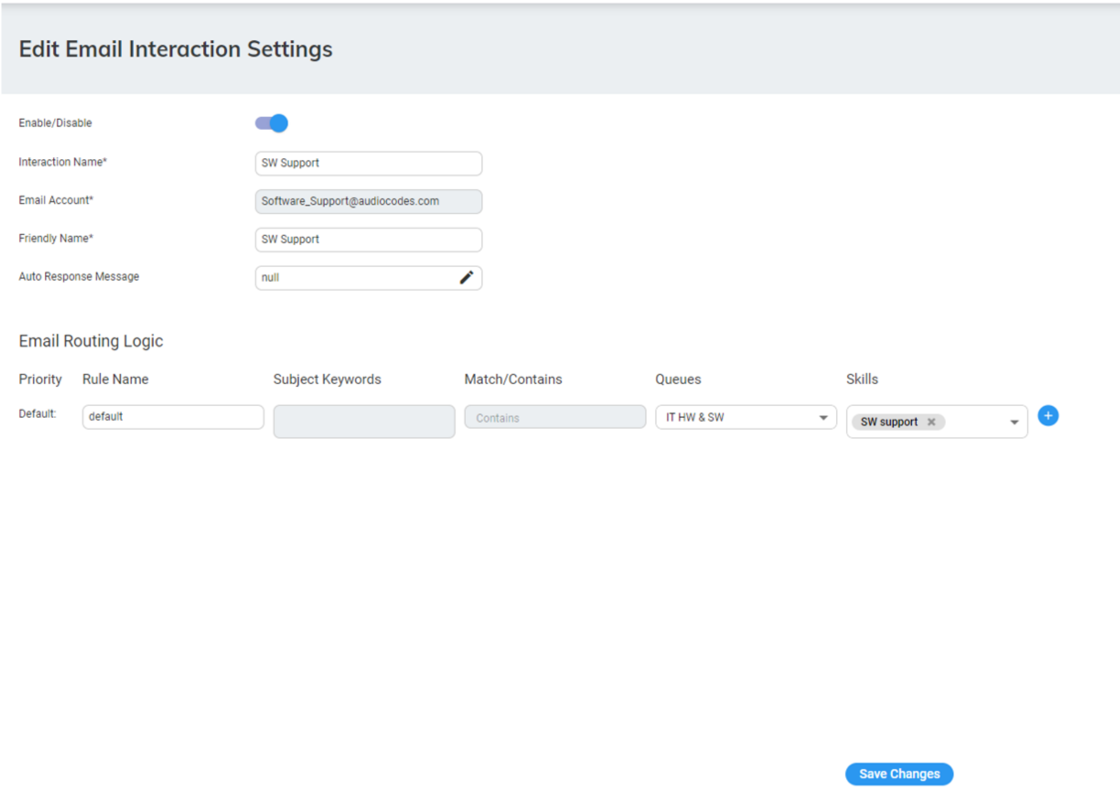
1. Open the Email Interaction Settings page (**Configuration** > **Interaction Manager** > **Email**); the following appears:



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



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



4. Edit the fields you want to change.

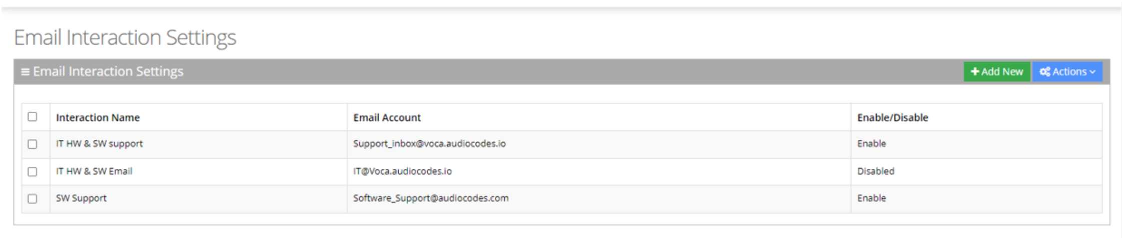
5. Click **Save Changes**.

Deleting an Email Interaction Setting

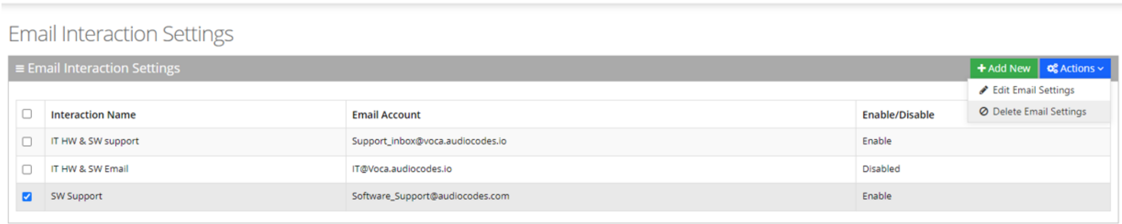
The procedure below describes how to delete Email Interaction Settings.

➢ To delete Email Interaction Settings:

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



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



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.

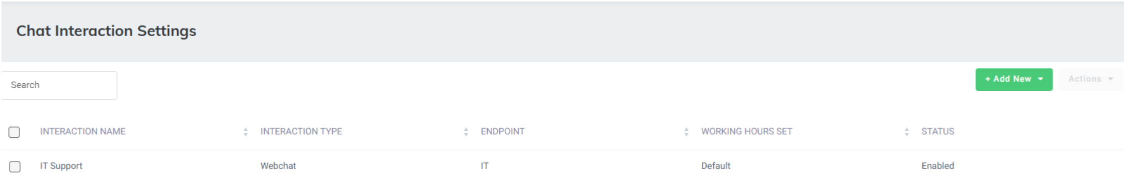
- Configuring Webchat Interactions below
- Configuring SMS interactions on page 62

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:



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.

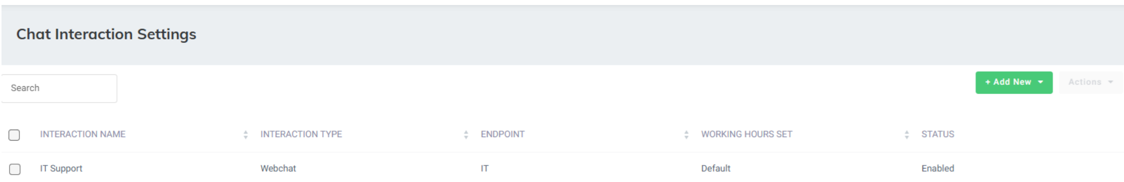
Adding Webchat Interaction Settings

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

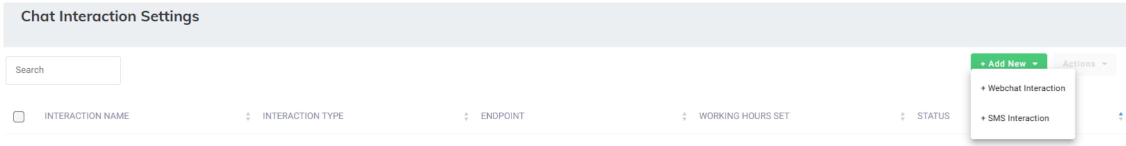
- General
- Webchat Design
- Pre-Chat

➢ To add a Webchat Interaction Setting:

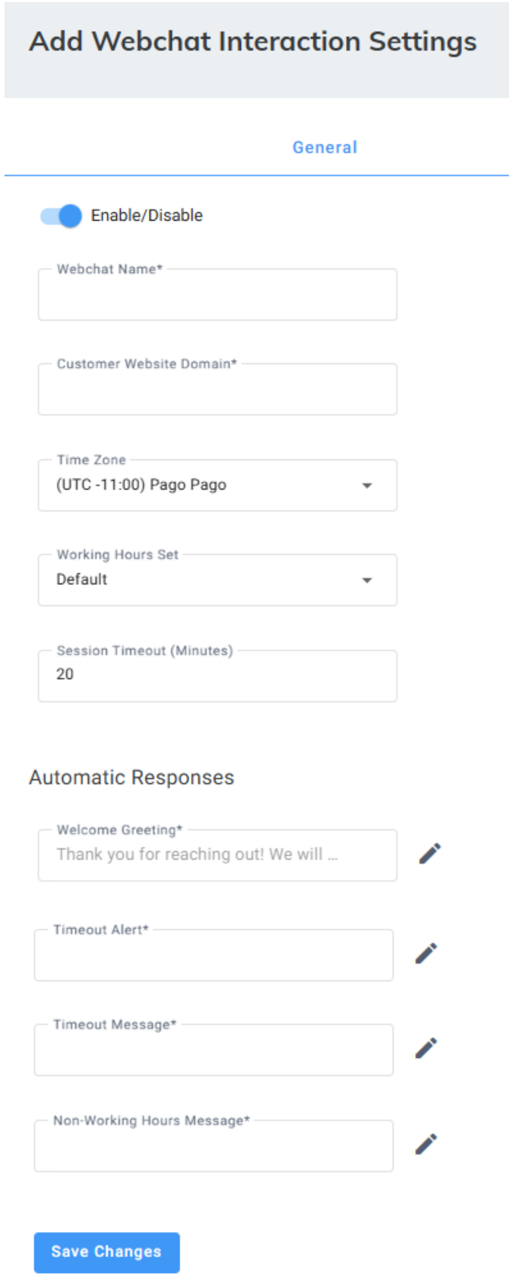
1. Open the Chat Settings page (**Configuration** > **Interaction Manager** > **Chat**); the following appears:



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



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



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.

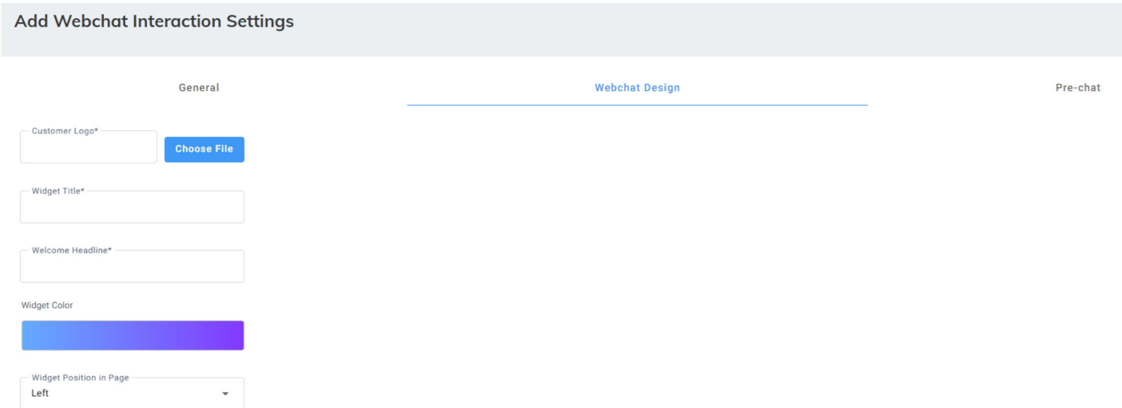
d. From the 'Working Hours Set' drop-down list, select a working hour set to define the working / non-working days and time for the webchat interaction.

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:



5. Define the widget's appearance:

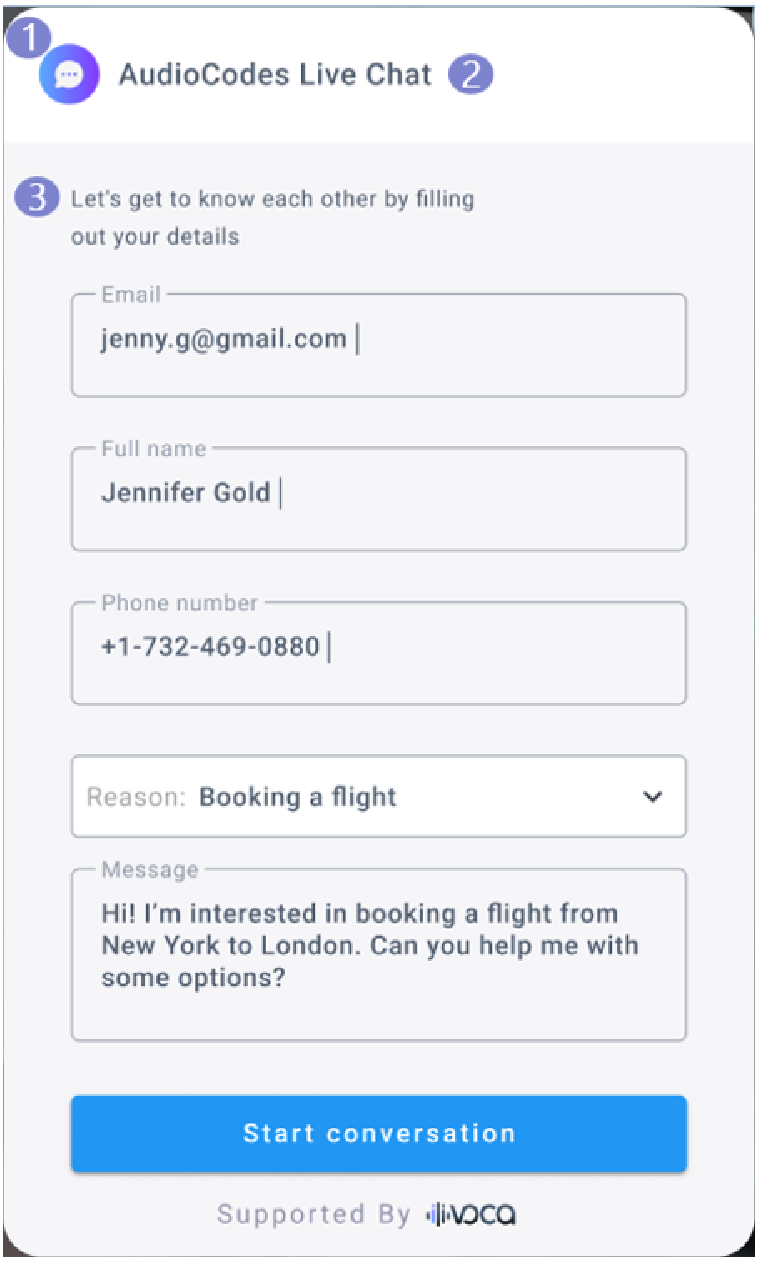
a. In the 'Customer Logo' field, click Choose File and then upload your organization logo (see item #1 in the example figure below).

b. In the 'Widget' field, type the name of the widget (see item #2 in the example figure below).

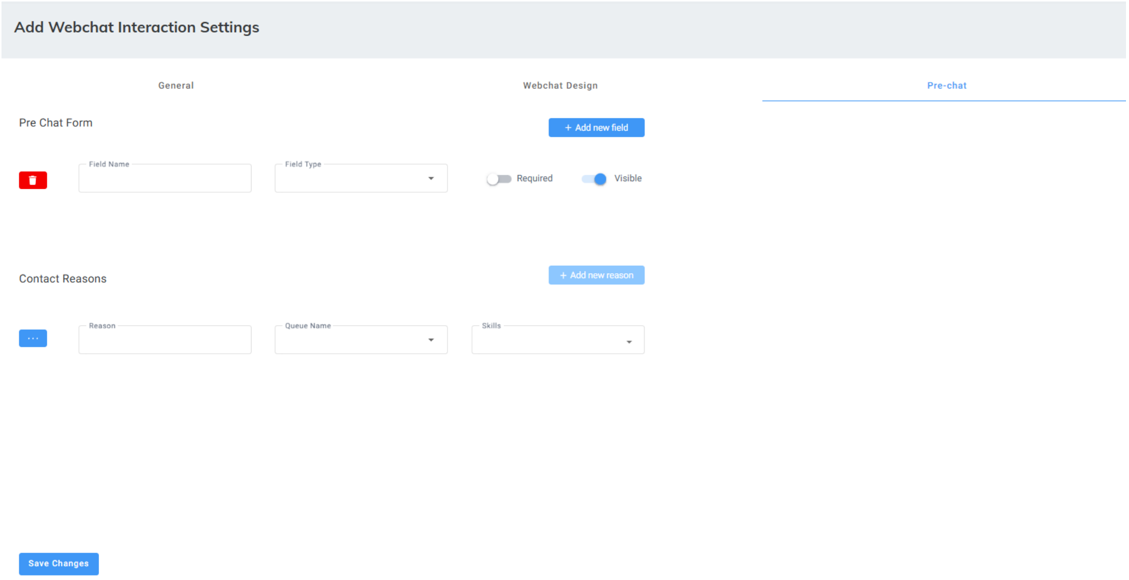
c. In the 'Welcome Headline' field, type a short webchat introduction (see item #3 in the example figure below).

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.



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



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**.

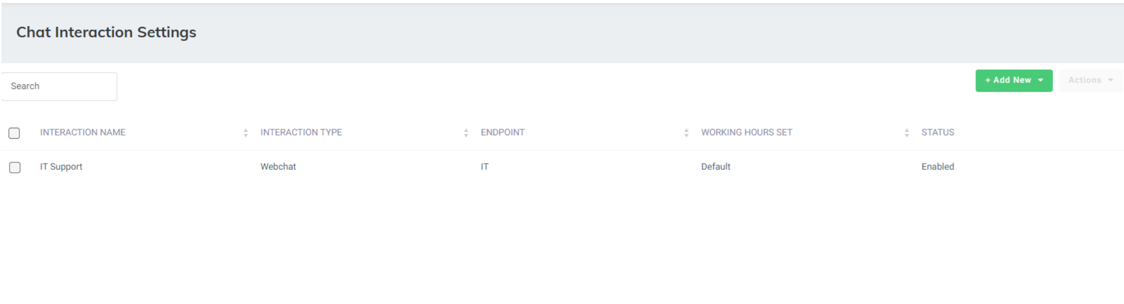
g. You can add sub-reasons to sub reasons.

Connecting the Webchat Interaction to the Website

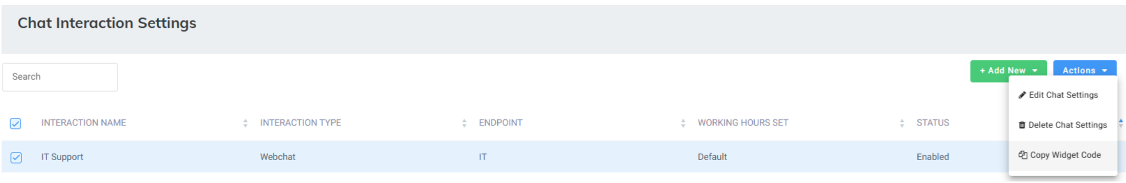
The procedure below describes how to connect the webchat widget to the website.

➢ To connect webchat widget to website:

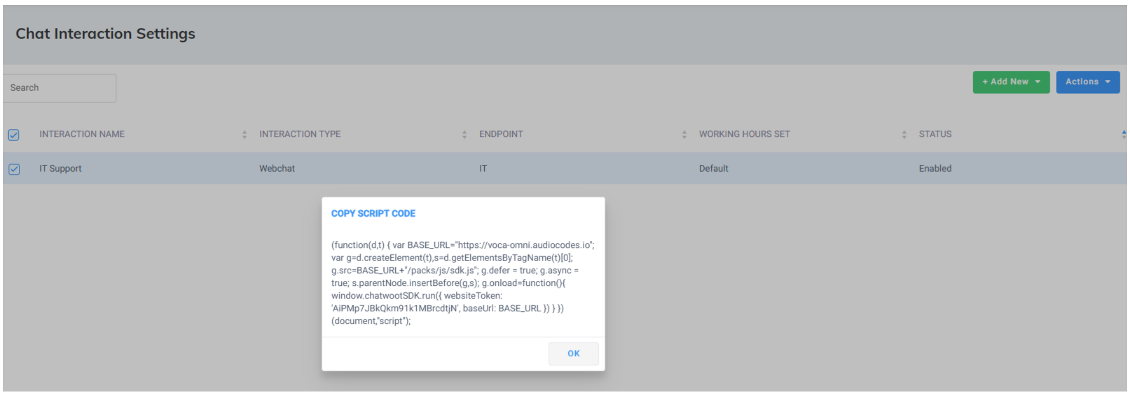
1. Open the Chat Settings page (**Configuration** > **Interaction Manager** > **Chat**); the following appears:



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:



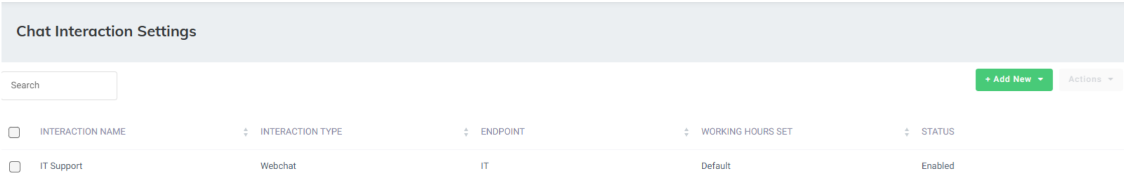
4. Copy and paste the code script into the website's HTML code.

Editing Webchat Interaction Settings

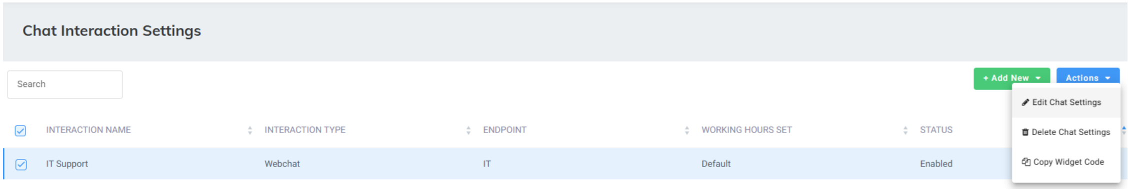
The procedure below describes how to edit Webchat Interaction Settings.

➢ To edit a Webchat Interaction Setting:

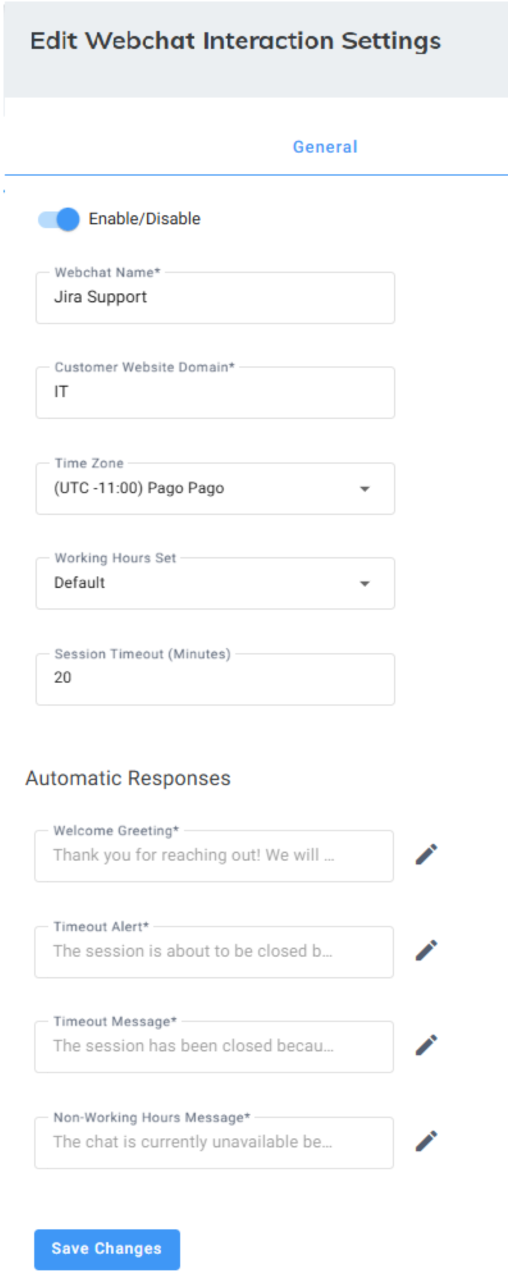
1. Open the Chat Interaction Settings page (**Configuration** > **Interaction Manager** > **Chat**); the following appears:



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



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



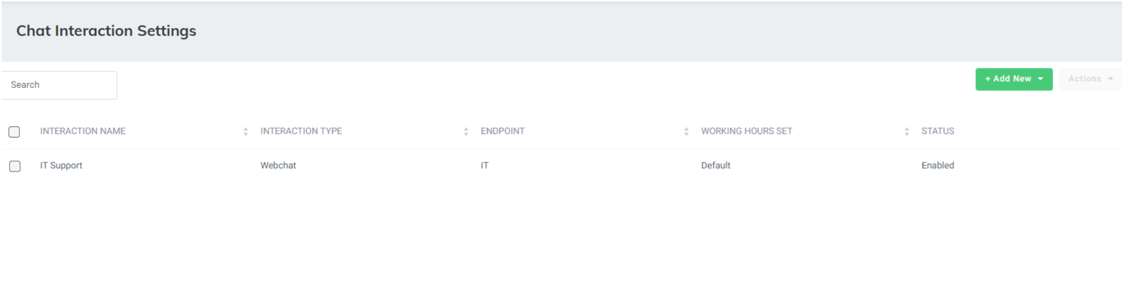
4. Edit the fields you want to change.
5. Click **Save Changes**.

Deleting Chat Interaction Settings

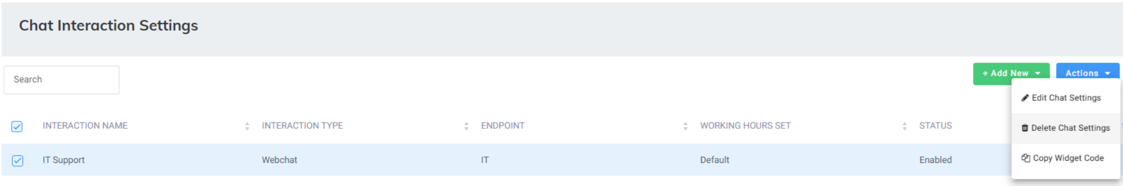
The procedure below describes how to delete Webchat Interaction Settings.

➢ **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**.

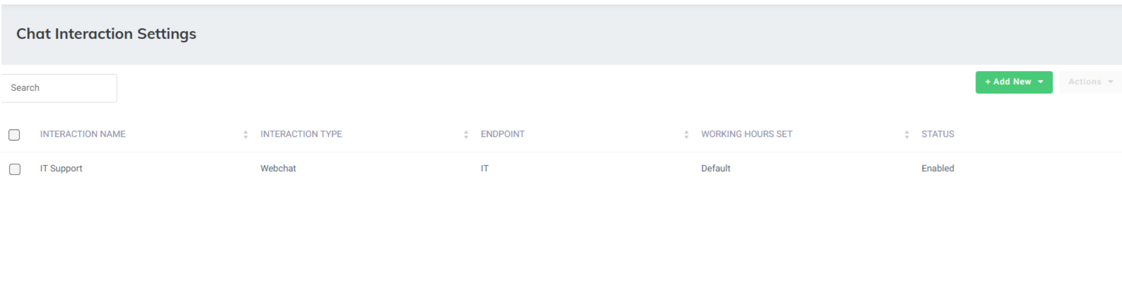
Configuring SMS interactions

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.

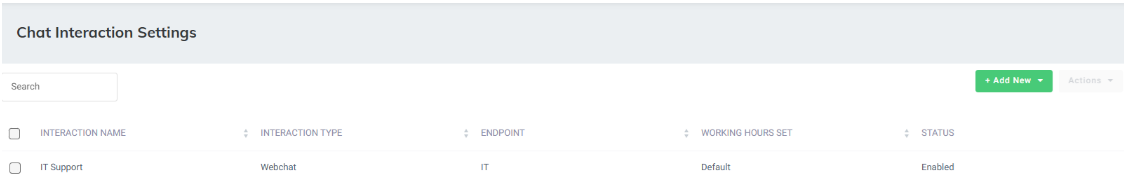
- 'Working Hour Set': Defines which working hour set is used to define the working / non-working days / time for the flow.
- 'Status': Either 'Enable' or Disable'. An enabled interaction allows the appearance of the chat widget on the website or the SMS.

Adding SMS interactions

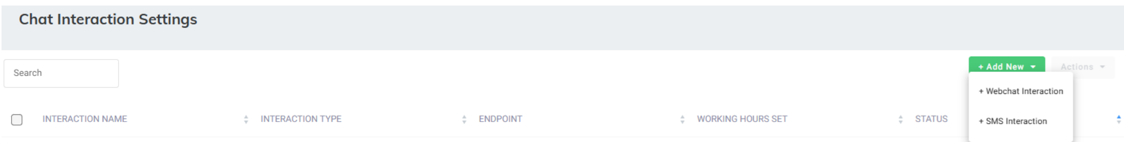
You must configure SMS settings, in the System Settings, *before* adding an SMS interaction. For details, see Configuring Omnichannel settings for SMS.

➢ To add an SMS Interaction Setting:

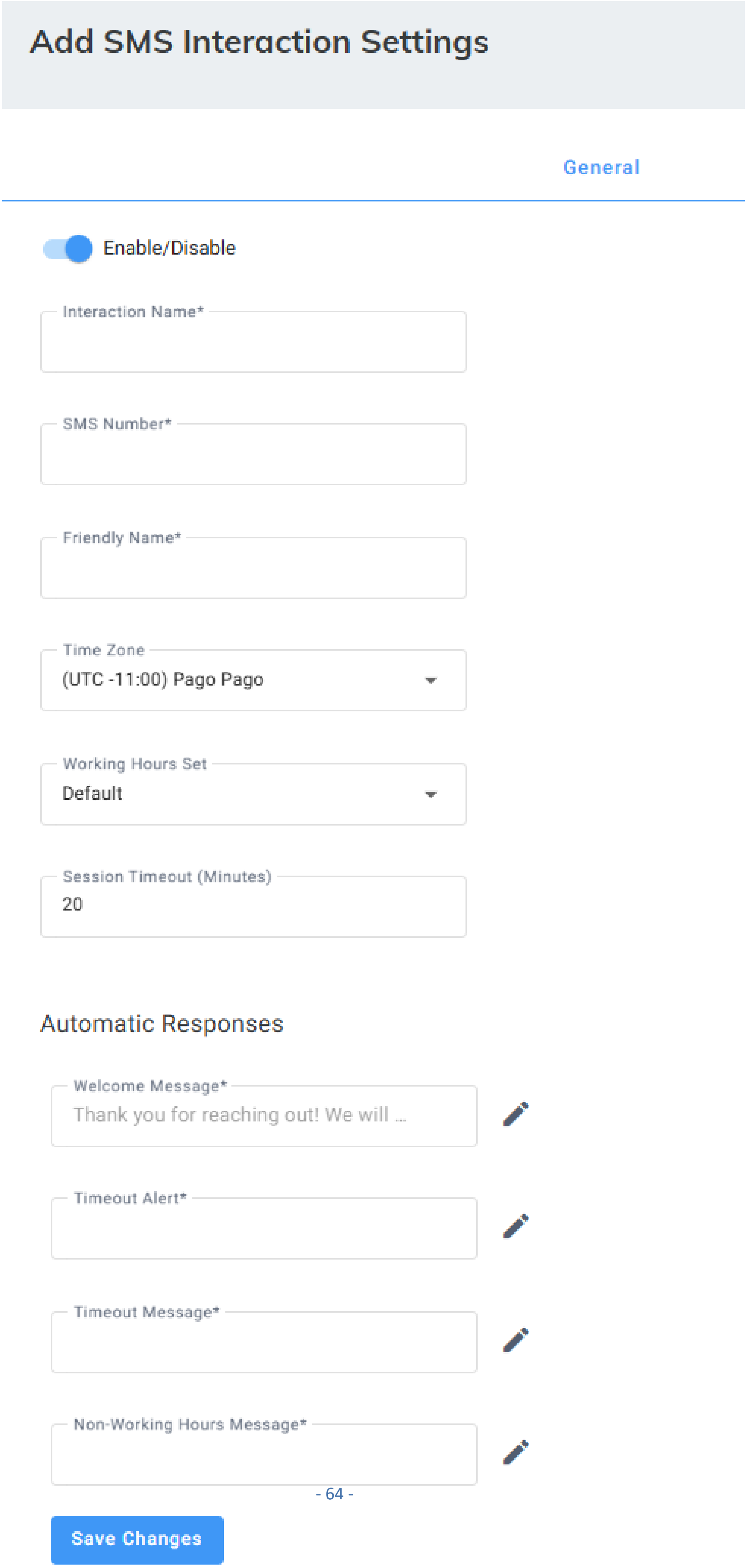
1. Open the Chat Settings page (**Configuration** > **Interaction Manager** > **Chat**); the following appears:



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

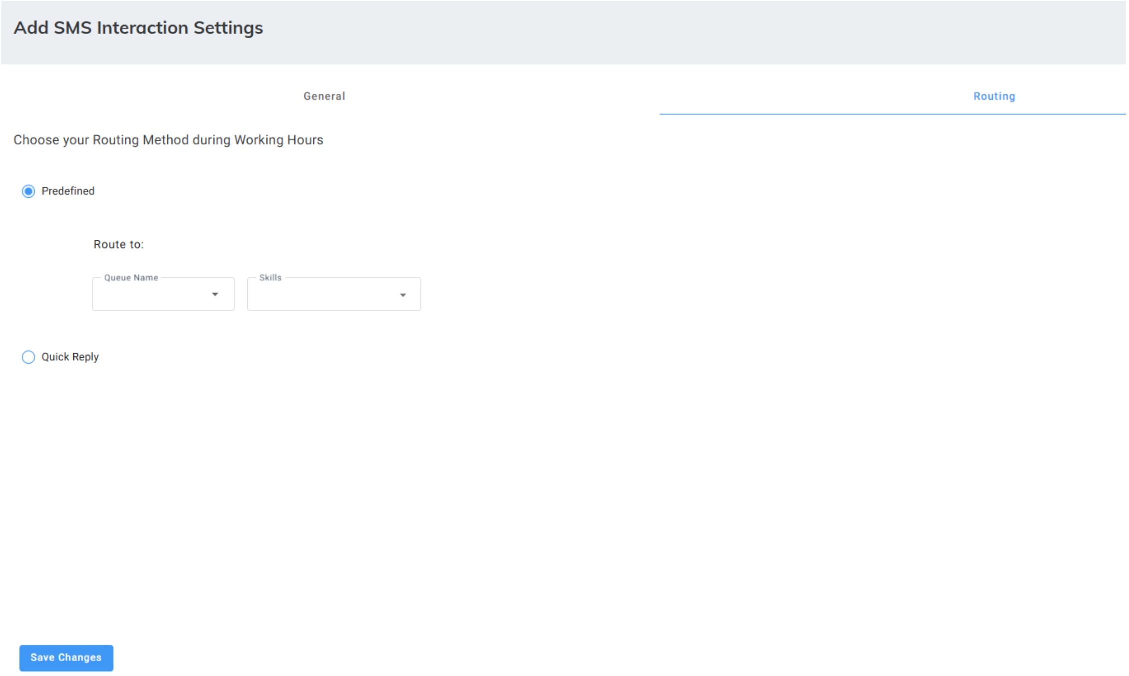
   h. Under the **Automatic Responses** group, define automatic messages for different scenarios:

      - '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.

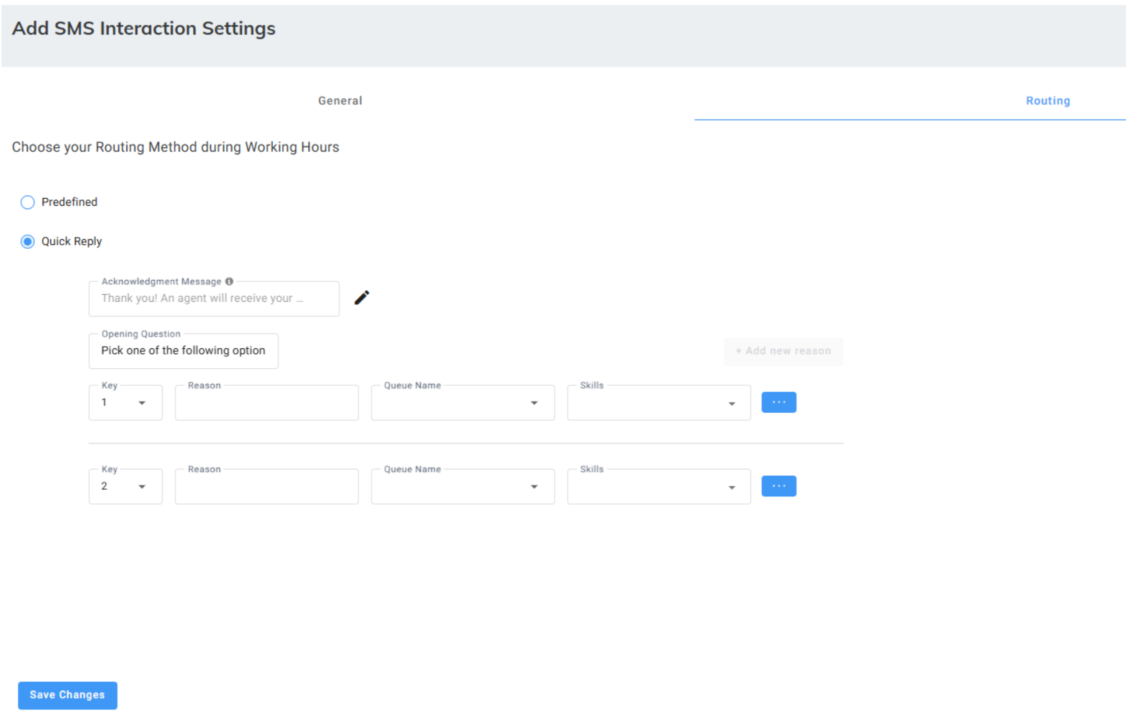
5. If you selected **Predefined**, the following appears:



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:



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.

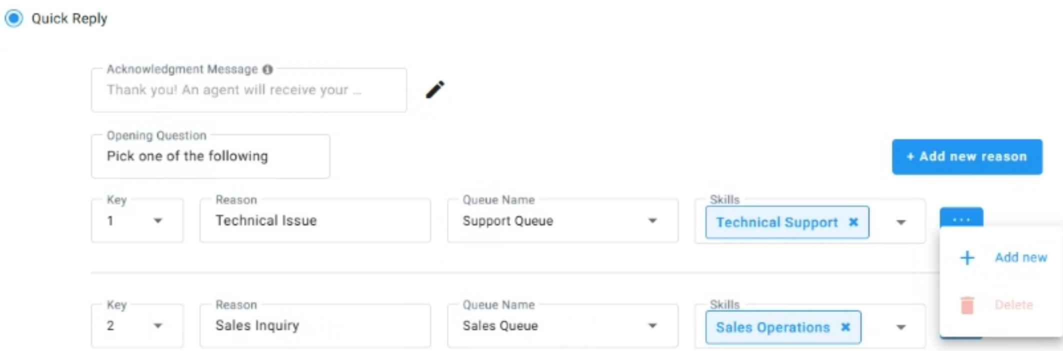
c. In the 'Reason' field, enter the text that corresponds to the key. This is what the customer will see as an option (for example, "Technical Support", "Sales Inquiry").

d. From the 'Queue Name' drop down, select the queue where messages should be routed if the customer chooses this option.

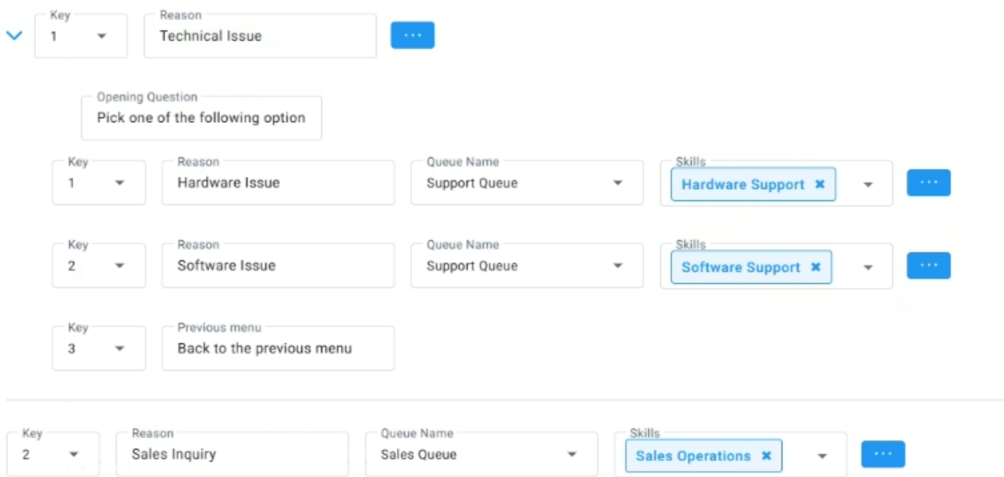
e. From the 'Skills' drop down, select any specific skills required by agents in the chosen queue to handle this type of inquiry.

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.



ii. Click **Add new.**



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.

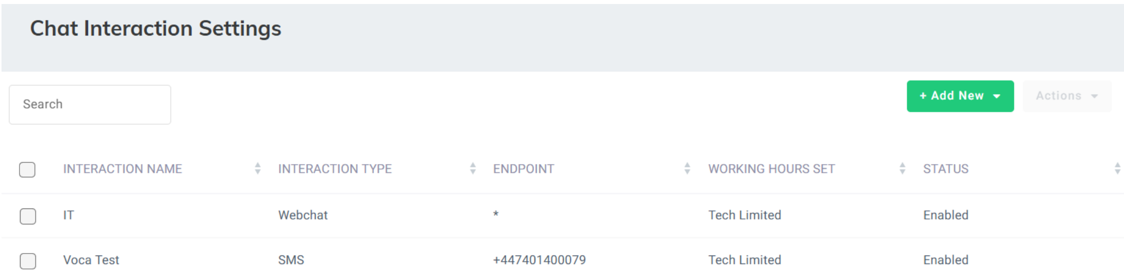
g. If you need to add more options, click the "+ Add new reason" button and repeat the steps for each additional option.

Editing SMS interactions

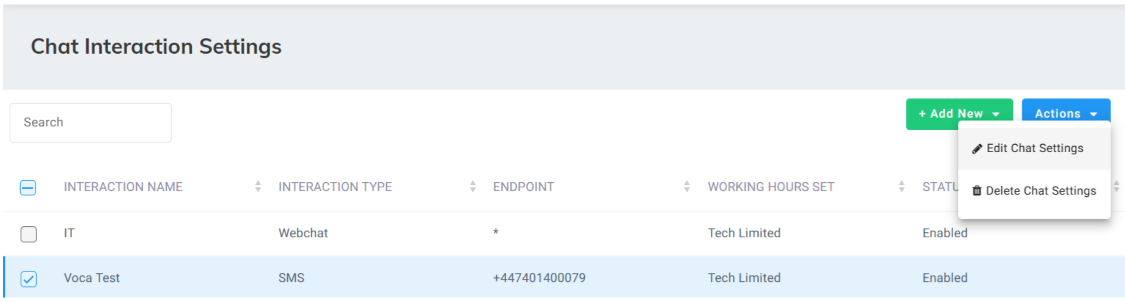
The procedure below describes how to edit SMS Interaction Settings.

➢ To edit SMS Interaction Settings:

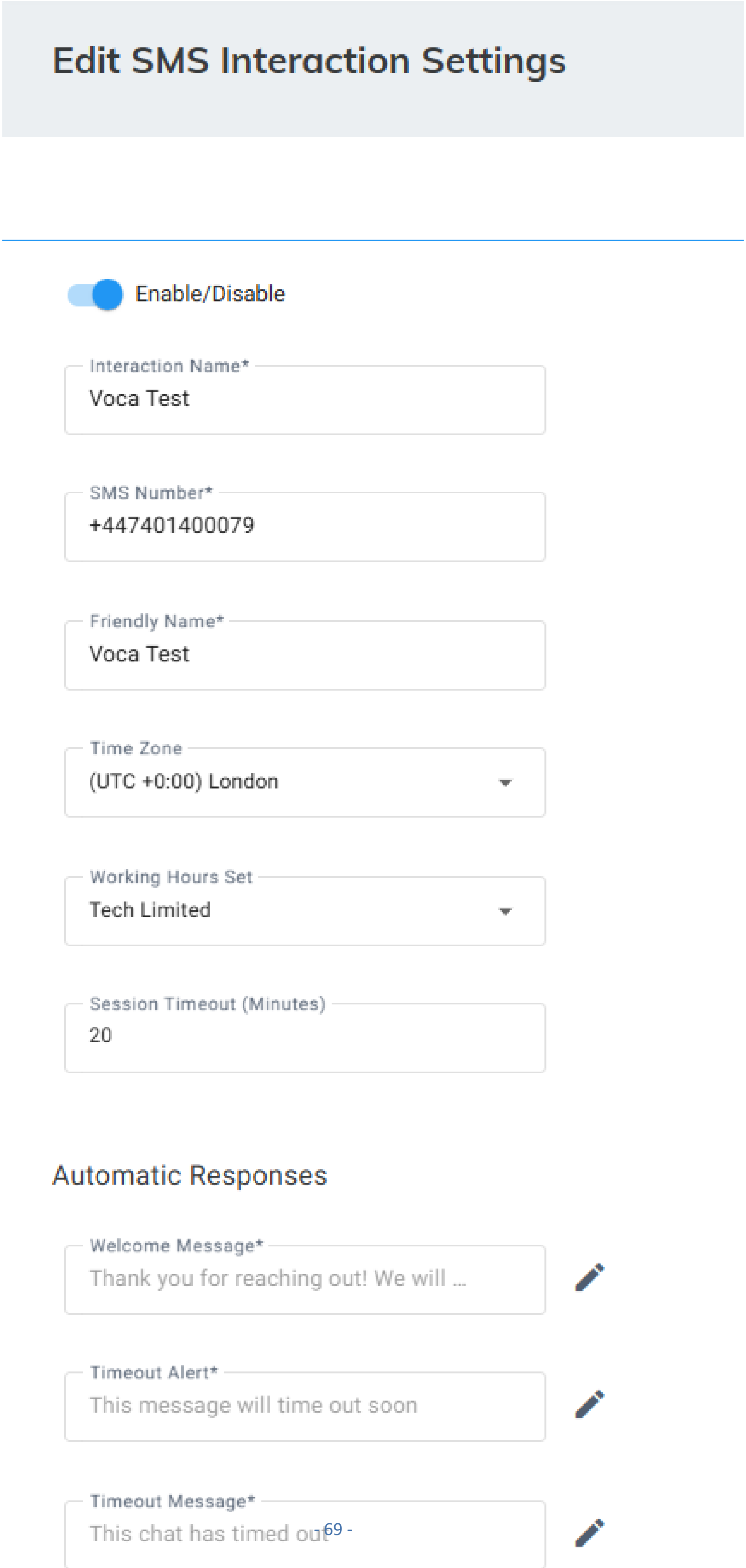
1. Open the Chat Interaction Settings page (**Configuration** > **Interaction Manager** > **Chat**); the following appears:



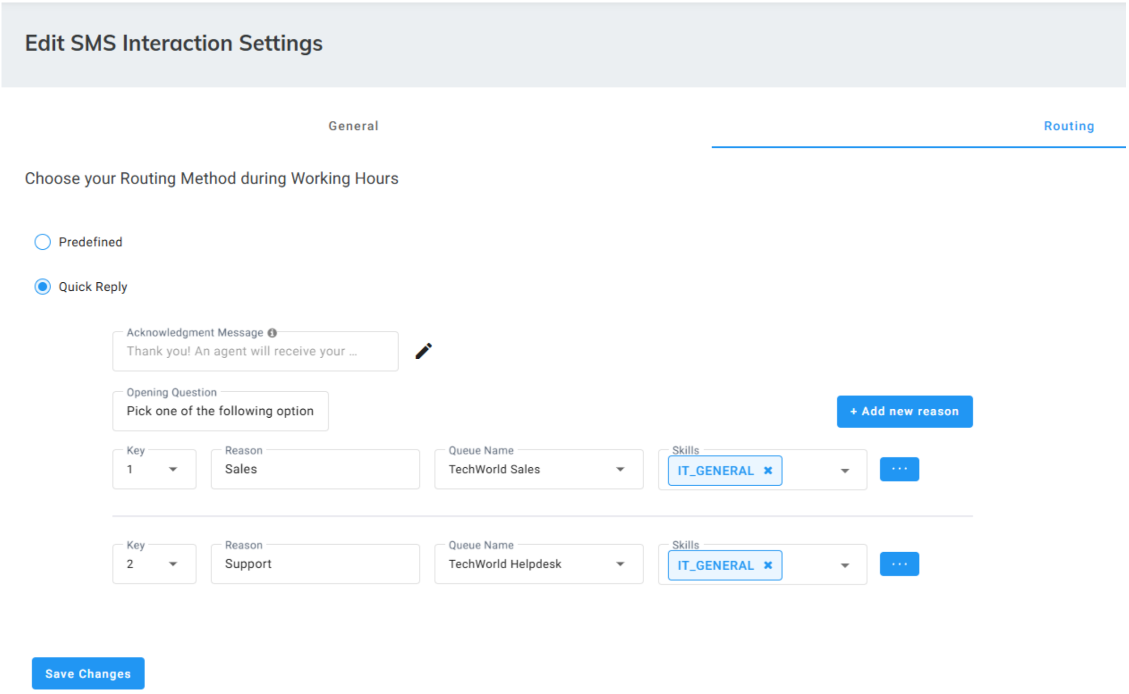
2. Select the SMS interaction check box that you want to edit.



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 out

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



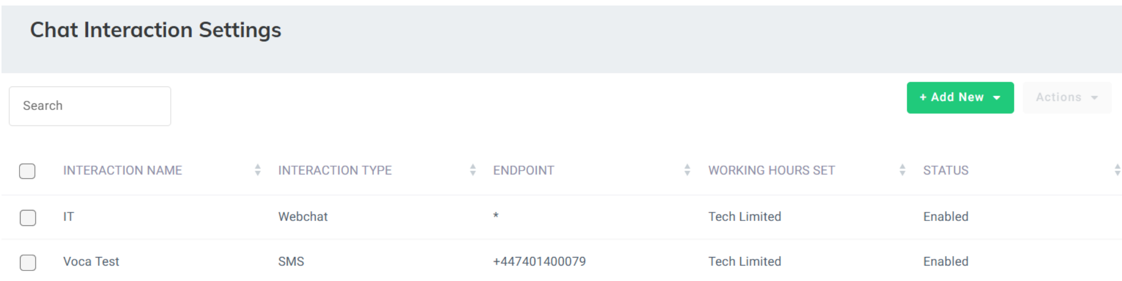
6. Click **Save Changes**.

Deleting SMS interactions

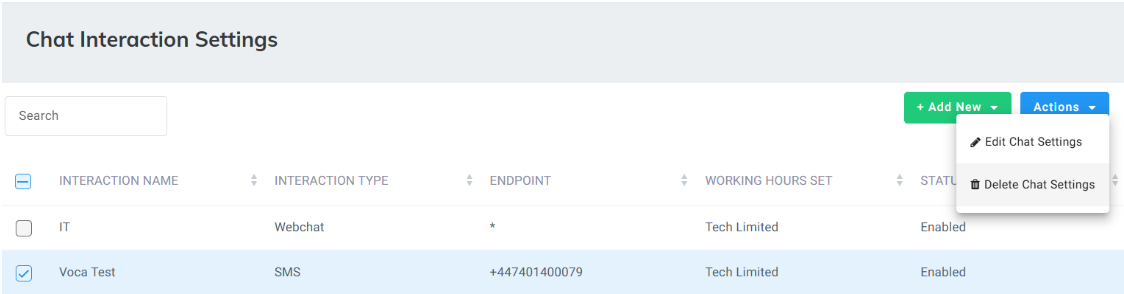
The procedure below describes how to delete SMS Interaction Settings.

➢ To delete an SMS Interaction Setting:

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



2. Select the SMS interaction that you want to delete.



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

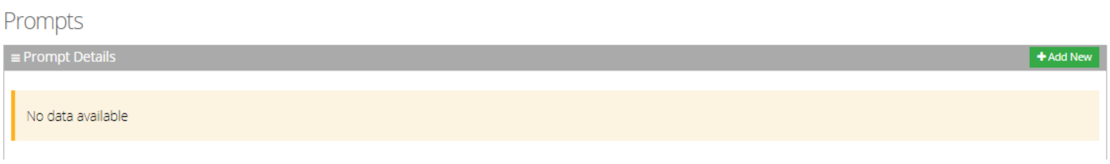
Adding a Voice Prompt

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.

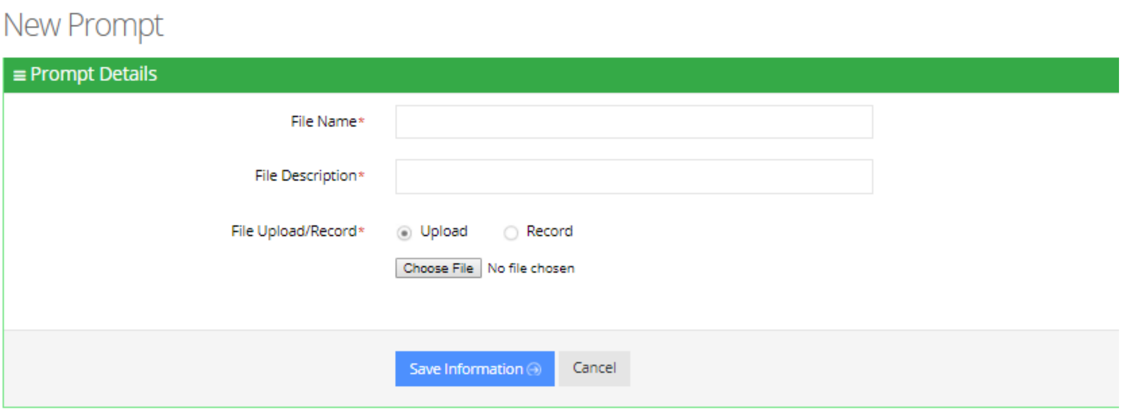
The procedure below describes how to upload an audio prompt for the Voca service.

➢ To add a new prompt:

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



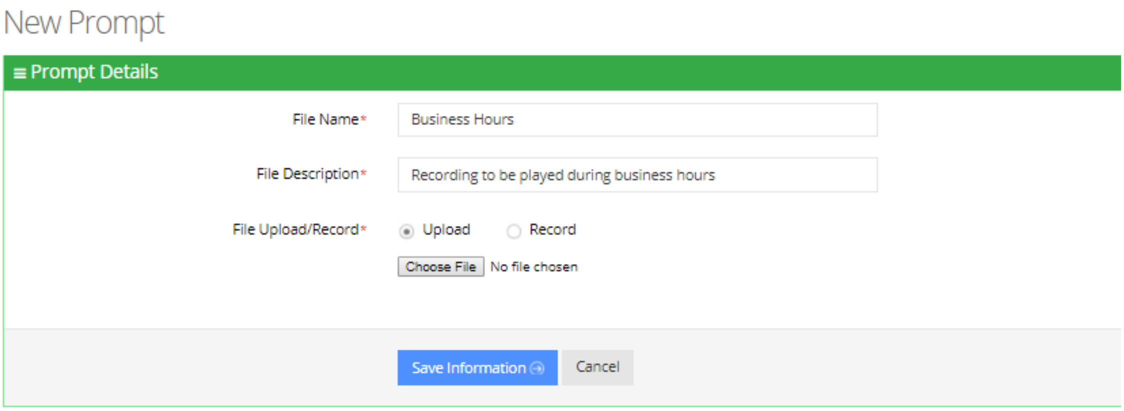
2. From the Prompts screen, click **Add New**; the following appears:



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

➢ To upload a file:

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

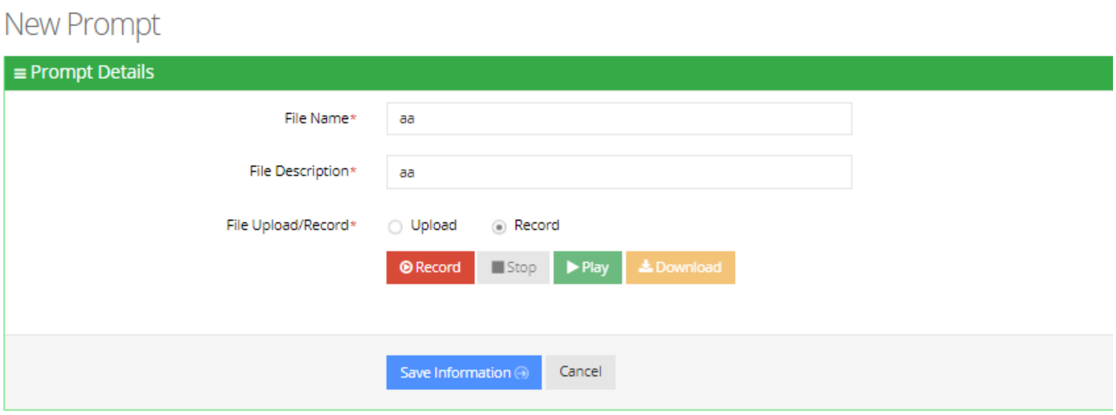


3. Click **Save Information** to complete the upload process.

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

➢ To record a file:

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



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

Configuring Menu Settings

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

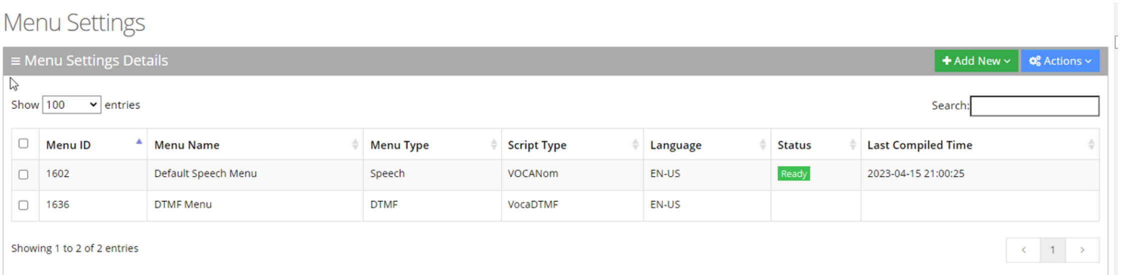
- DTMF Menu
- Speech Menu

Adding a DTMF Menu

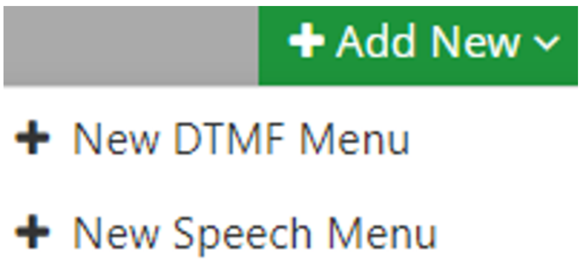
The procedure below describes how you can add a DTMF menu.

➢ **To add a DTMF menu:**

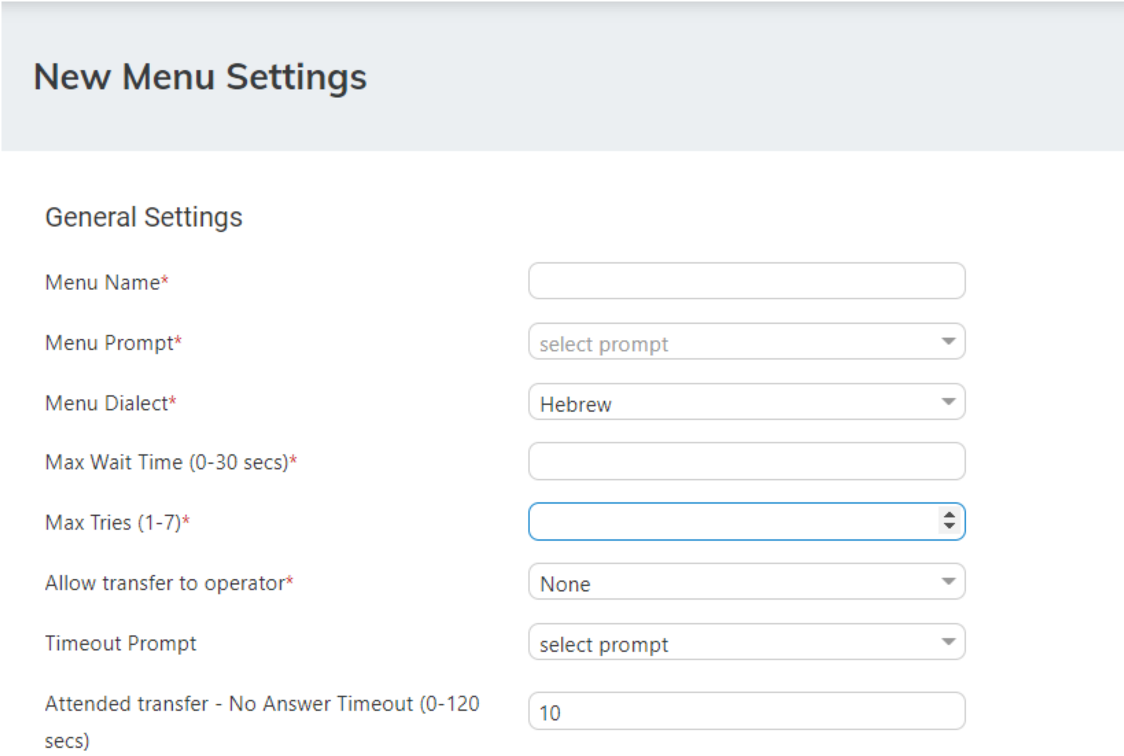
1. Open the Menu Settings page (**Configuration** > **Menu Settings**); the following screen example appears.



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



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



4. From the 'Menu Prompt' drop-down list, select the pre-configured prompt. See Adding a Voice Prompt on page 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.

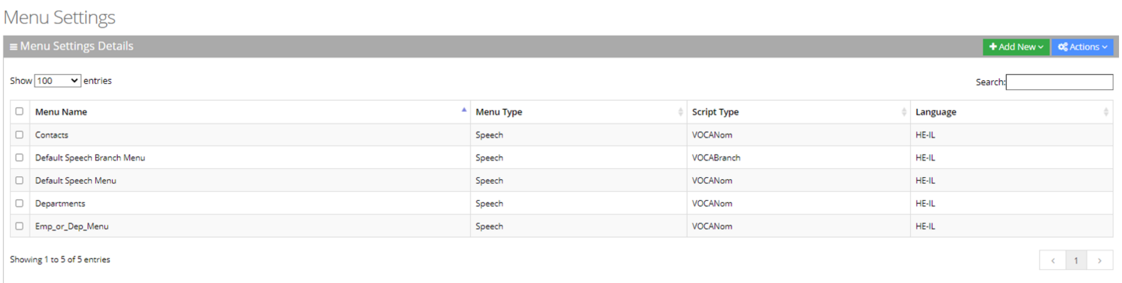
13. Click **Save Changes**.

Adding a Speech Menu

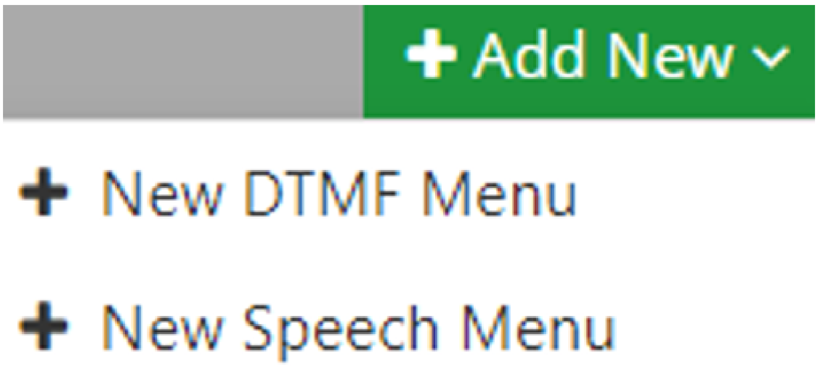
The procedure below describes how to add an Interactive Voice Response (IVR) speech menu.

➢ **To add a Speech Menu:**

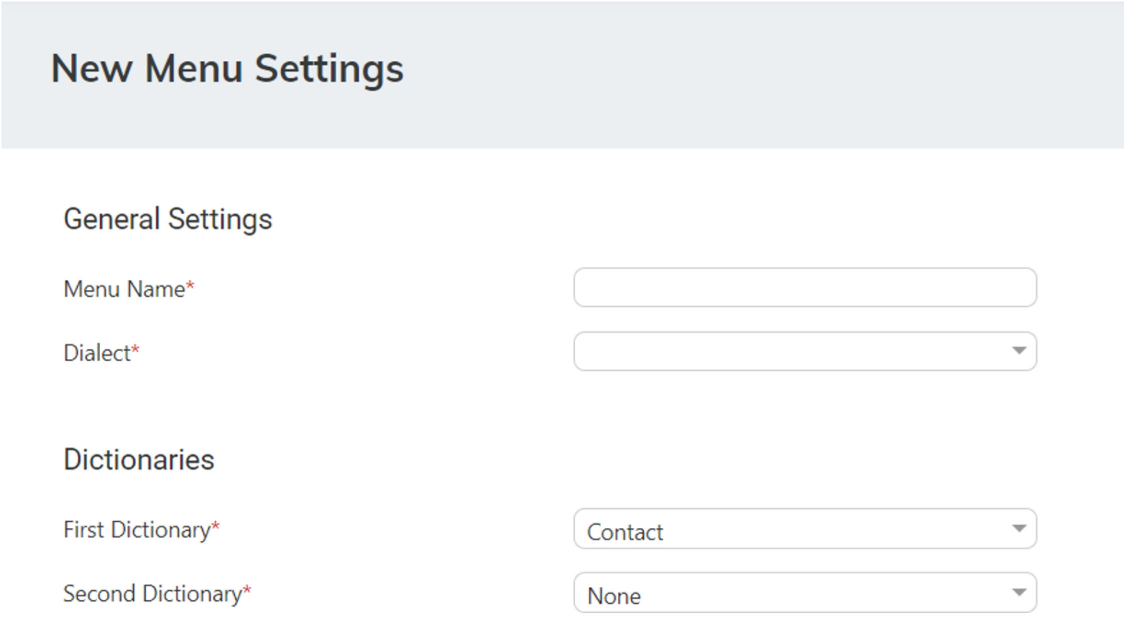
1. Open the Menu Settings page (**Configuration** > **Menu Settings**); the following example appears.



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



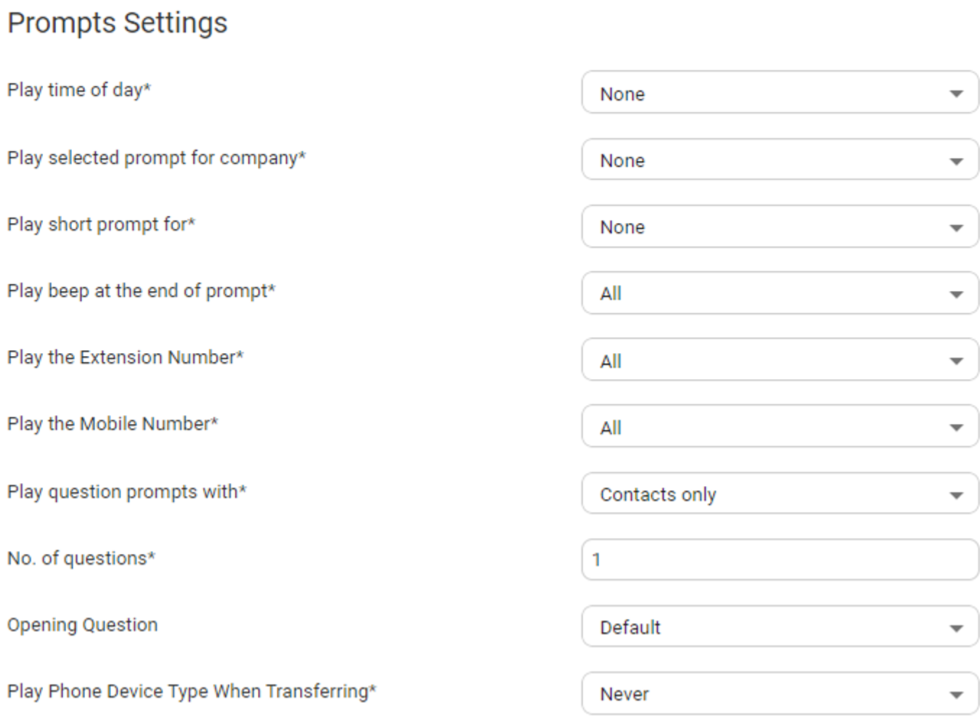
3. Select the **+ New Speech Menu**; the New Menu Settings page appears:



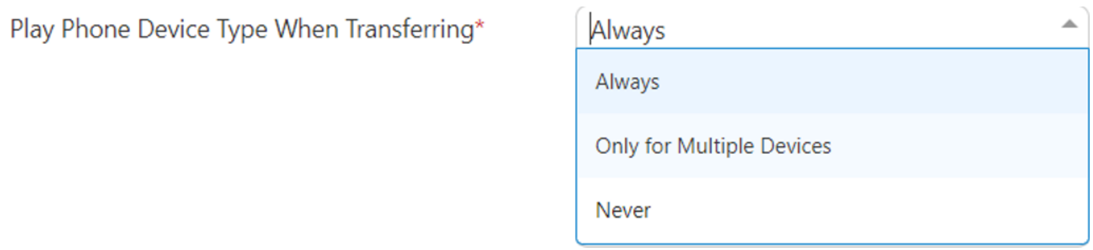
4. Under the **Dictionaries** group, select the 'First Dictionary' and 'Second Dictionary' fields to be used for the menu. The 'Second Dictionary' can be set to "None". The Contact dictionary contains Contact Names without departments. The dictionaries are taken from the Dictionary List in the Department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

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

   - None
   - Anonymous
   - Employees
   - All

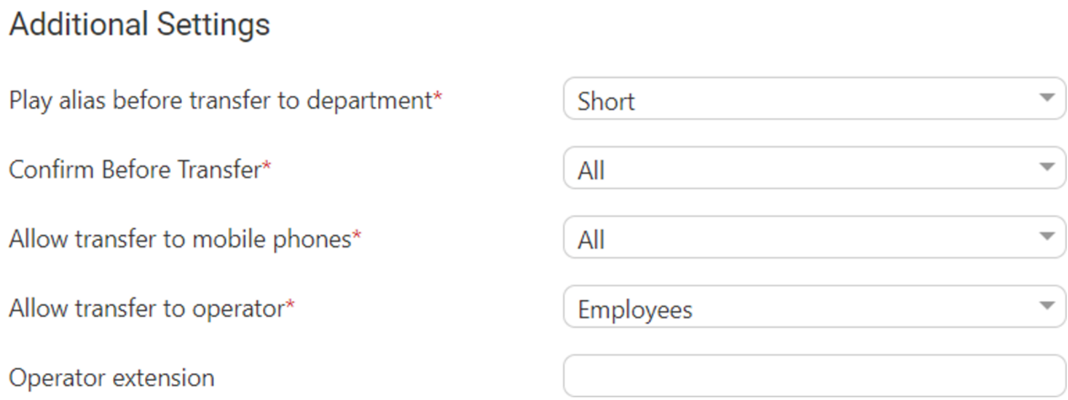


- **'Play time of day':** Select for which group you are playing the time system menu prompts.
- **'Play selected prompt for company':** Select for which group you are playing the selected prompt.
- **'Play short prompt for':** Select for which group you are playing the short prompt.
- **'Play beep at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



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

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



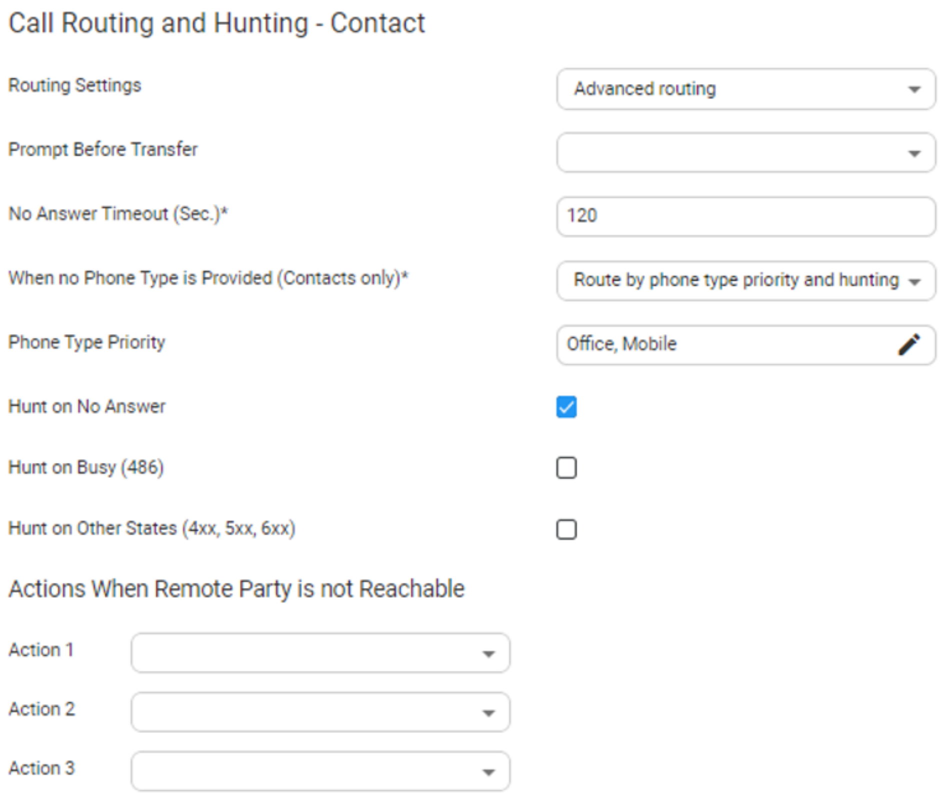
- 'Play alias before transfer to department' field: select one of the following options:
  - **Short:** If the alias was recognized, the system plays the recognized alias instead of the Department name before the transfer. If there is disambiguation between departments, the alias is played before playing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

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

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

- 'Operator extension' field: Select the number to dial when the user presses "0" or says "operator".

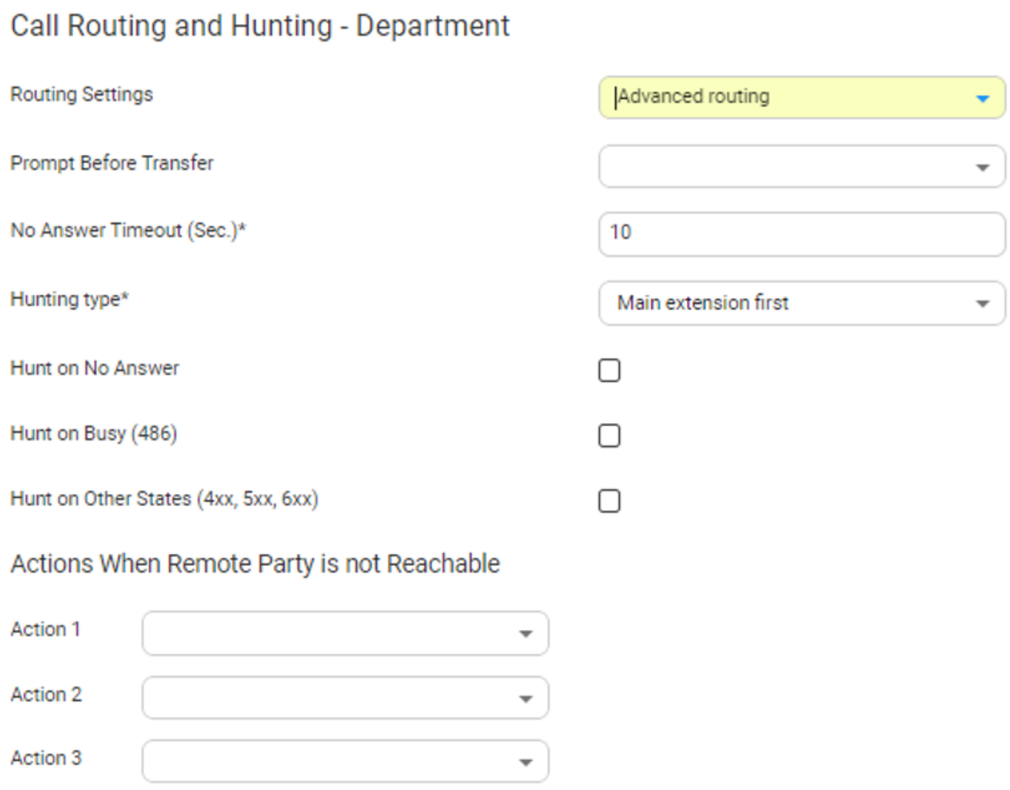
7. Under the **Call Routing and Hunting - Contact** group from the 'Routing Settings' drop-down list, select either:
   - **Basic routing (default):** The call routing process remains as it is currently set.
   - **Advanced routing:** The call is set according to the following parameters:



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

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

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

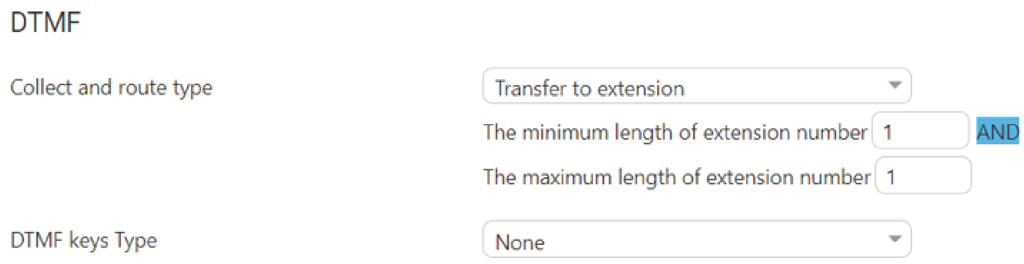


- From the 'Prompt Before Transfer' drop-down list, select a prompt from a list of available prompts, before the call is transferred.
- In the 'No answer timeout (0-120 secs)' field, set the time you want the system to wait for the remote side to answer the call, before moving to the next phone type, when hunting or doing an action when the remote party is not reachable.
- From the 'Hunting type' drop-down list, select one of the options:
    - **Main extension first:** Select this option when hunting for a free extension always start from Extension 1.
    - **Round robin:** Select this option when hunting for a free extension. Always start from the extension following the last one used.
- Voca can perform Call Hunting based on the selected option. Configure which of the following states performs the hunting:
    - Hunt on No Answer
    - Hunt on Busy (486)
    - Hunt on Other States (4XX,5XX,6XX)

9. Under the **Actions when Remote Party is not Reachable** group, from the 'Action 1' drop-down list, select the appropriate value. When Voca transfers a call to a destination, the remote side (whether it is a contact or a department) may not be reachable. In such a case, Voca performs pre-defined actions.
   For an explanation of the above actions, see Actions.

10. Under the **DTMF** group, from the 'Collect and route type' drop-down list, select the appropriate value. This is used to collect and route by one or more digits:

- **None (default):** Functionality is disabled.
- **Transfer to extension:** Instead of saying a contact/department name, you can enter the entity phone number by DTMF and selecting either:
    - Minimum length of extension number
    - Maximum length of extension number



- **Transfer by DTMF routing key:** The collected digits are used to route the call to the contact or department tagged with the same DTMF routing key:
    - The minimum length of routing key
    - The maximum length of routing key

11. Under the **DTMF** group, from the 'DTMF keys Type' drop-down list, select **Second Language**. This option maps actions for DTMF keys. If this option is activated, the 'Collect and route type' field cannot be configured to collect only one digit. Select one of the following:

- **DTMF:** Configures the DTMF key that is pressed to trigger the required behavior
- **Behavior:** Defines the behavior of the DTMF key:
    - **Operator:** The call is diverted to the operator
    - **Go to menu:** The call is diverted to another menu

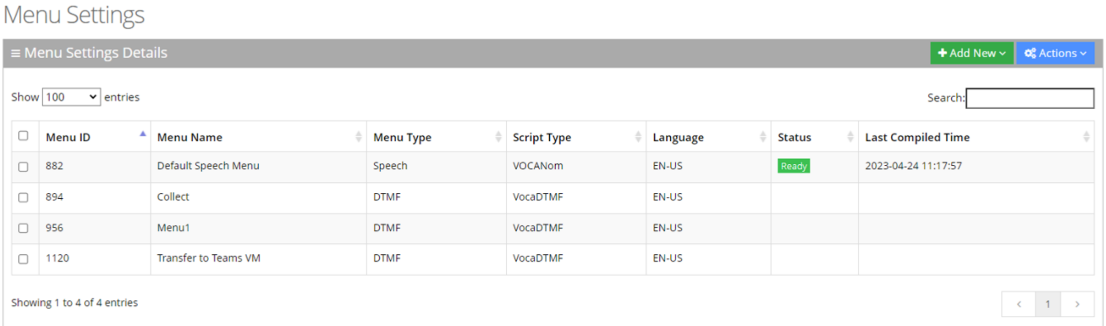
Editing Menu Settings

The procedure below describes how to edit menu settings.

➢ **To edit menu settings:**

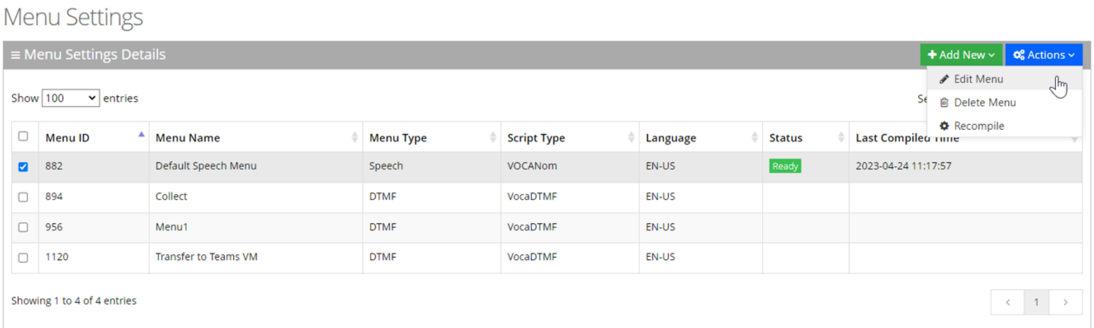
1. Open the Menu Settings screen (**Configuration** > **Menu Settings**); the following screen example appears:

Figure 6-1:



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

Figure 6-2:



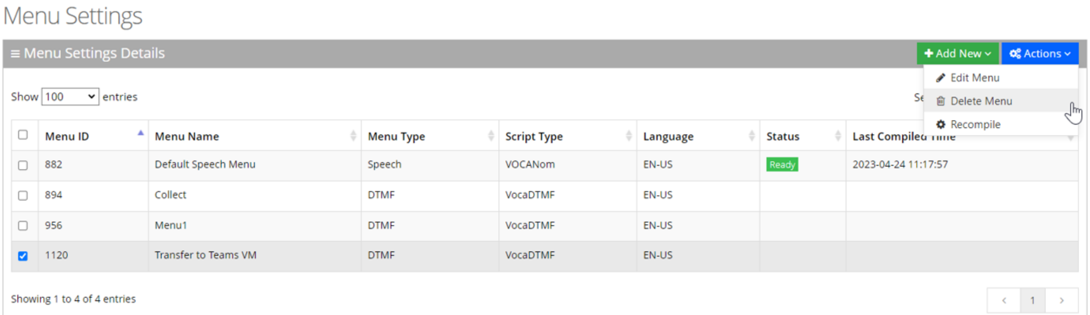
4. Select **Edit Menu**.
5. Edit the fields you want to change.
6. Click **Continue**.
7. Click **Save Changes**.

Deleting Menu Settings

The procedure below describes how to delete menu settings.

➢ To delete menu settings:

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



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

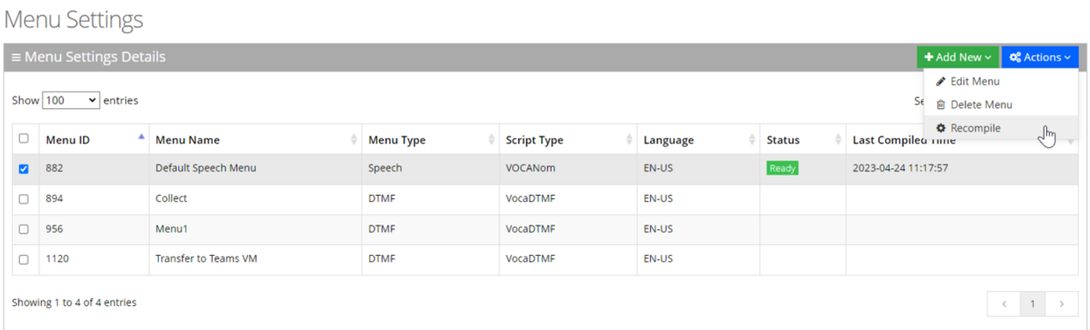
Speech menus (IVR and Branch) that include phrase list for recognition, must be compiled to support the recognitions. Compilation is done automatically in the background but can also be triggered by the customer. The procedure below describes how to compile menus.

➢ 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**.



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

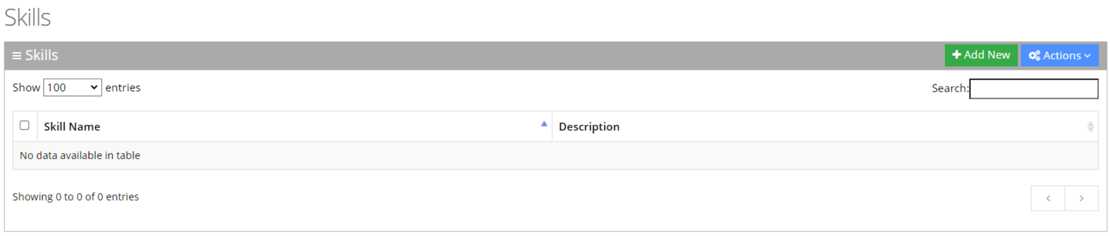
Skills are customer-definable labels assigned to workers. The Voca Interaction Center can route incoming calls to workers who have the necessary skills or sets of skills to handle the call.

Adding a Skill

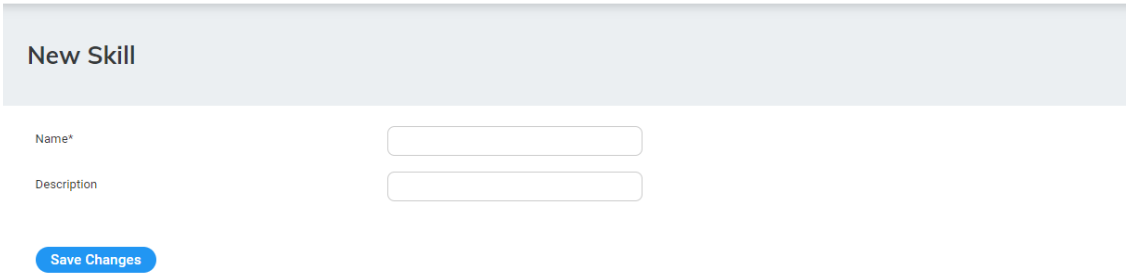
The procedure below describes how to add a Skill.

➢ To add a skill:

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



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



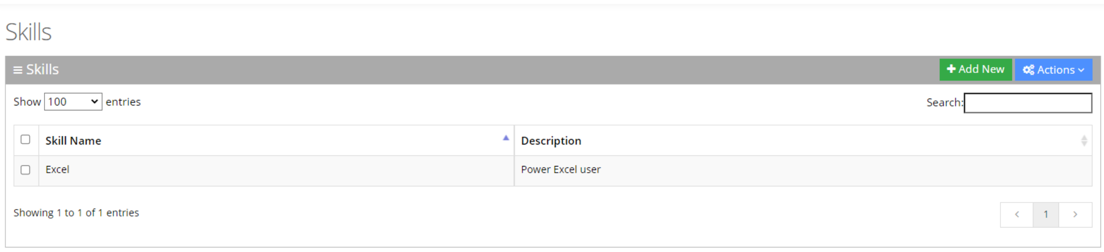
3. In the 'Name' field, enter the name of the skill (e.g., "Excel").
4. In the 'Description' field, enter a description of the skill (e.g., "Power user of Excel").
5. Click **Save Changes**.

Editing a Skill

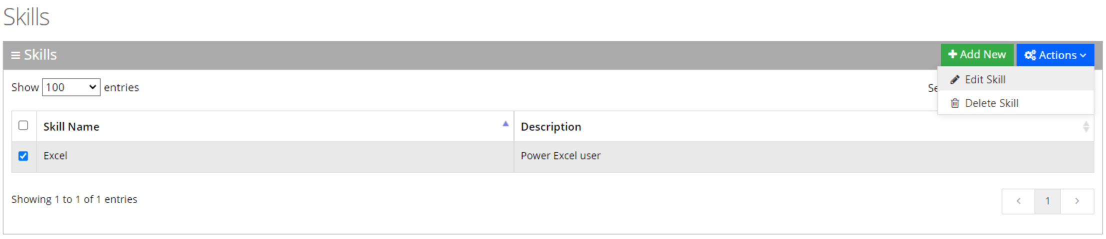
The procedure below describes how to edit a Skill.

➢ To edit a Skill:

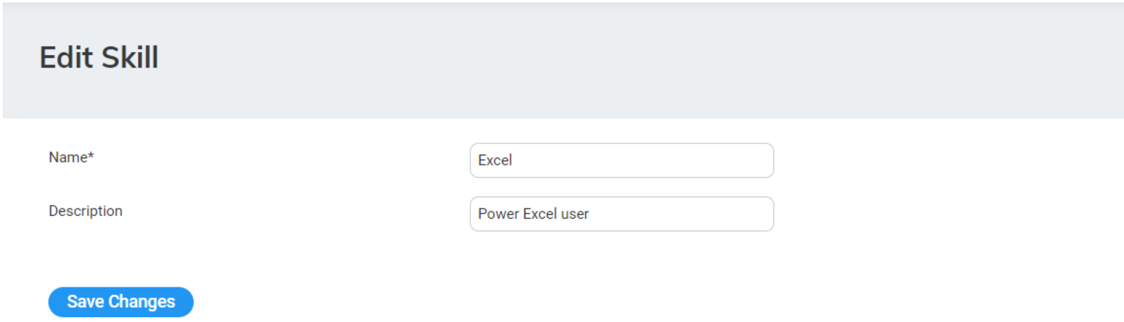
1. Open the Skills page (**Configuration** > **Routing** > **Skills**); the following appears:



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



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



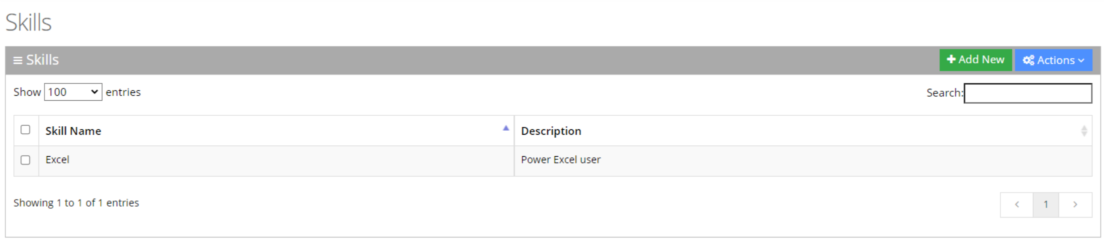
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Skill

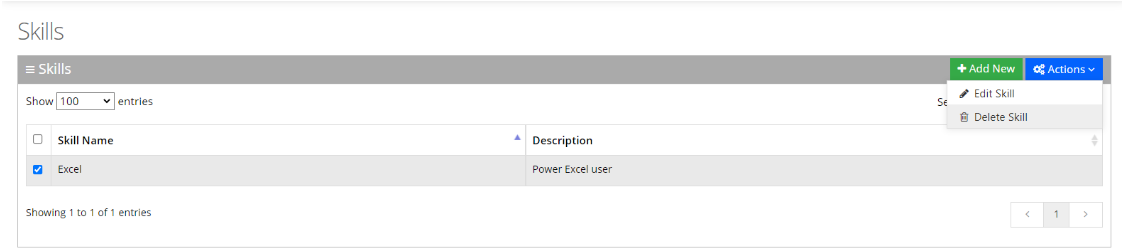
The procedure below describes how to delete a Skill.

➢ To delete a Skill:

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



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



A confirmation message box appears.

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

Configuring Workers

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

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

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

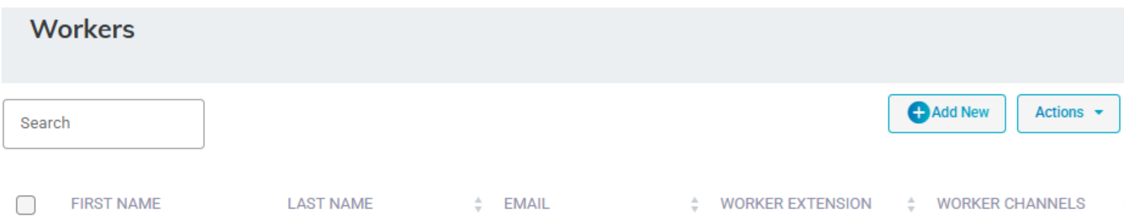
Adding a Worker

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

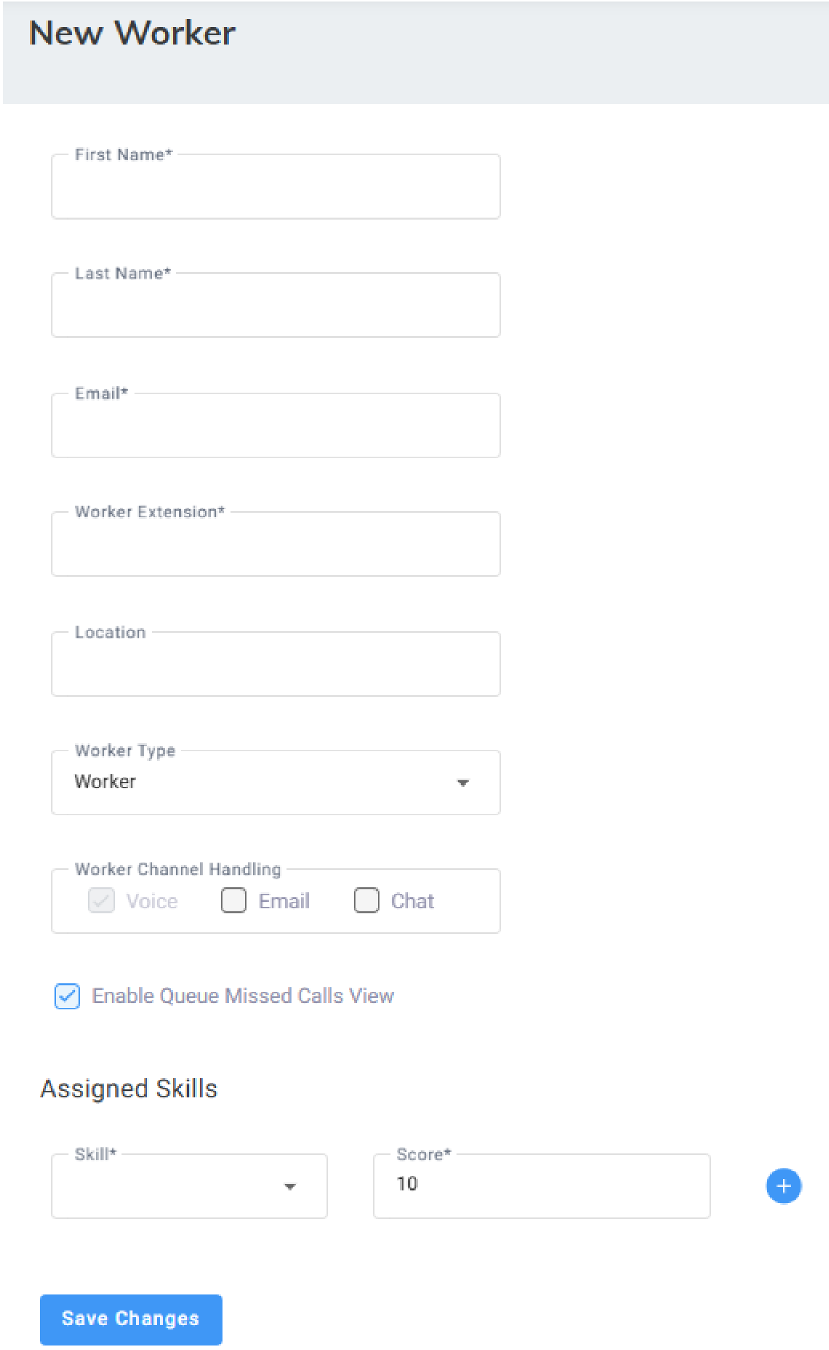
> Before adding a worker, ensure you configured skills. For details, see Adding a Skill on page 85.

➢ To add a Worker:

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



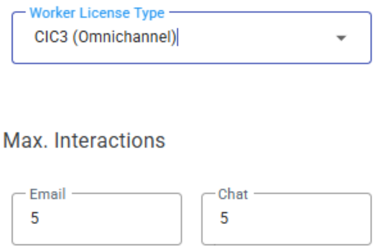
2. Click **Add New**; the following appears:



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' 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:

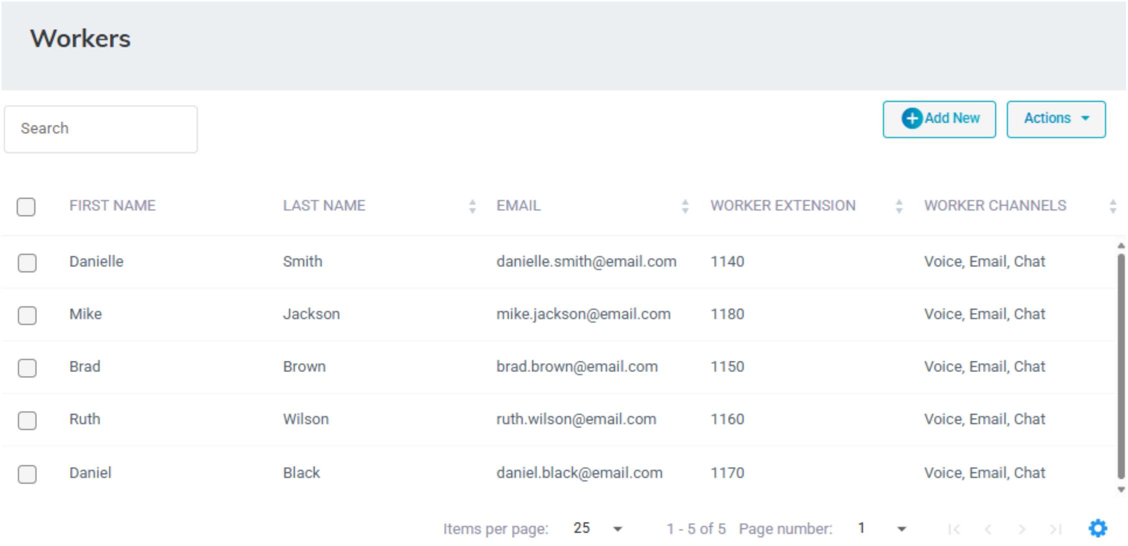
- Flex queues that the Supervisor is assigned to as a Supervisor (see Configuring Flex Queues on page 117)
- Worker queues their supervised Workers (in relevant Worker Groups) relate to
- All Tenant Workers
- Worker Groups they supervise
- Relevant Reports

Editing a Worker

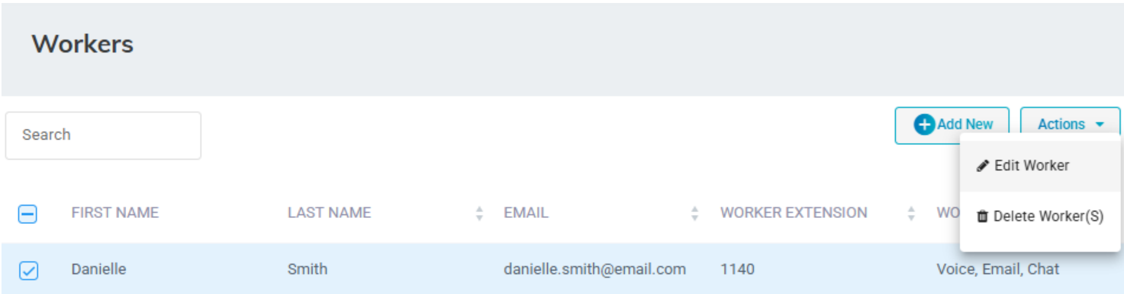
The procedure below describes how to edit a Worker.

➢ To edit a Worker:

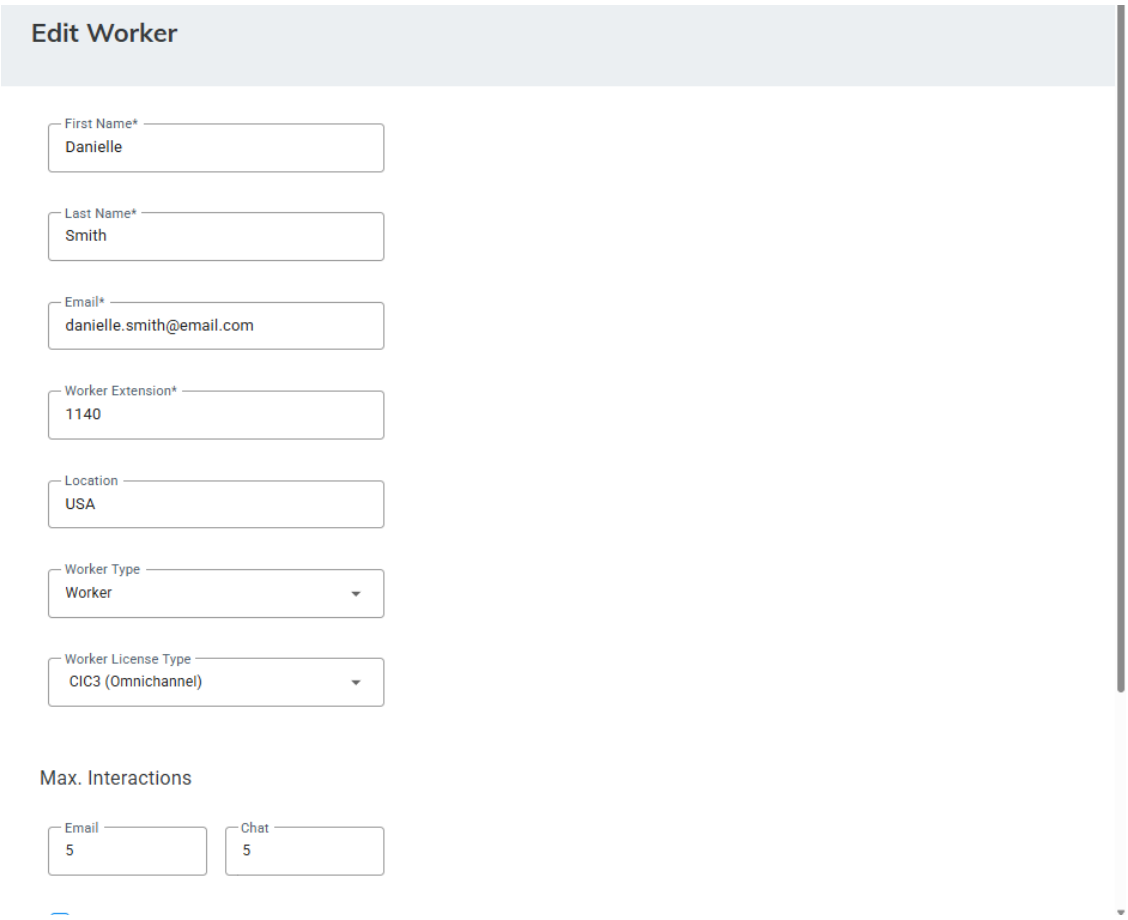
1. Open the Workers page (**Configuration** > **Routing** > **Workers**); the following appears:



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



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



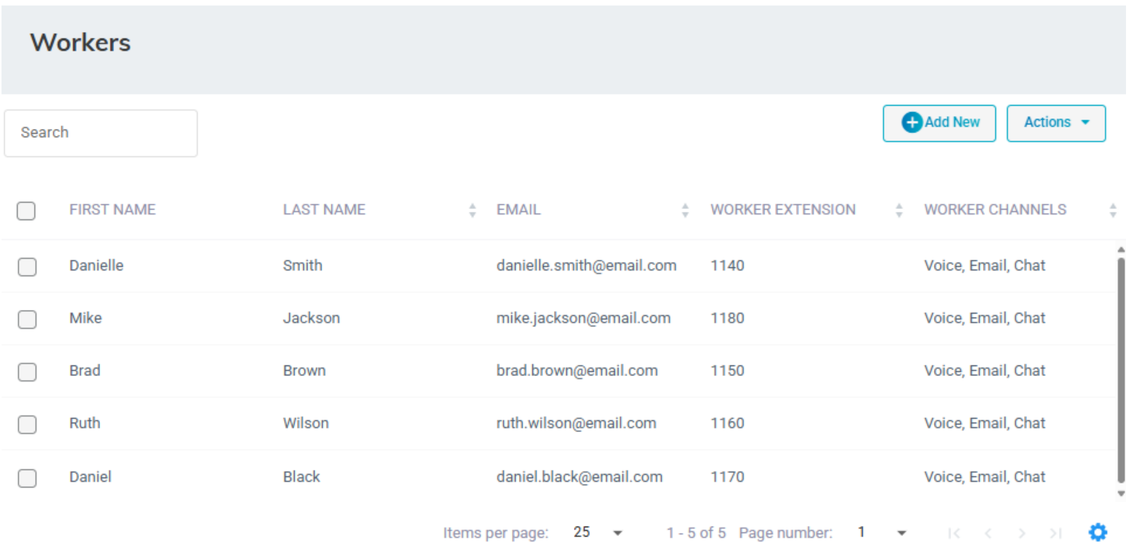
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Worker

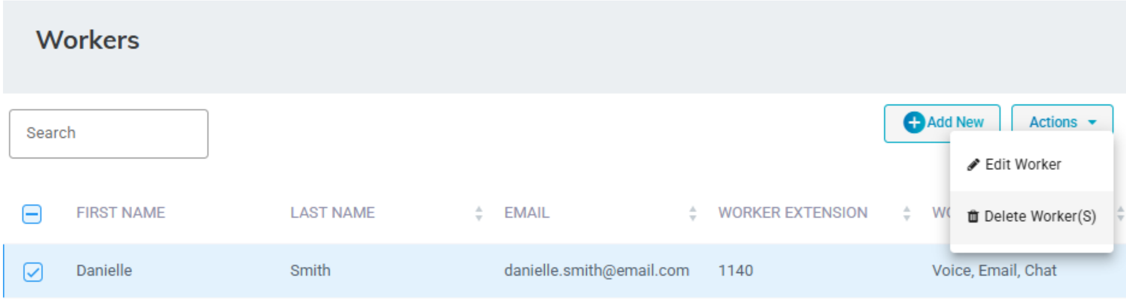
The procedure below describes how to delete a Worker.

➢ To delete a Worker:

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



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



A confirmation message box appears.

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

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

Configuring 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.

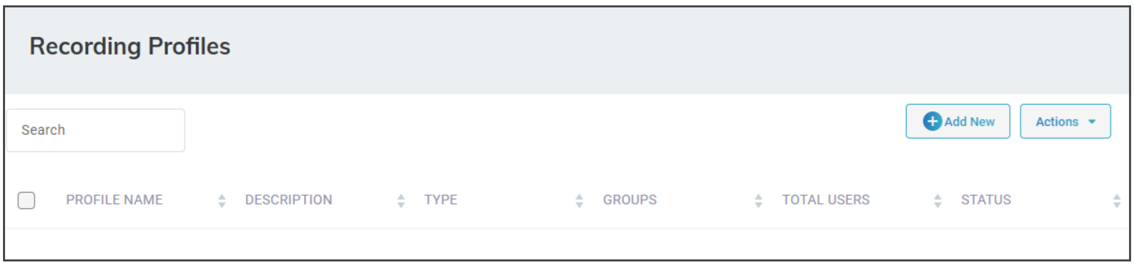
Adding a Recording Profile

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).

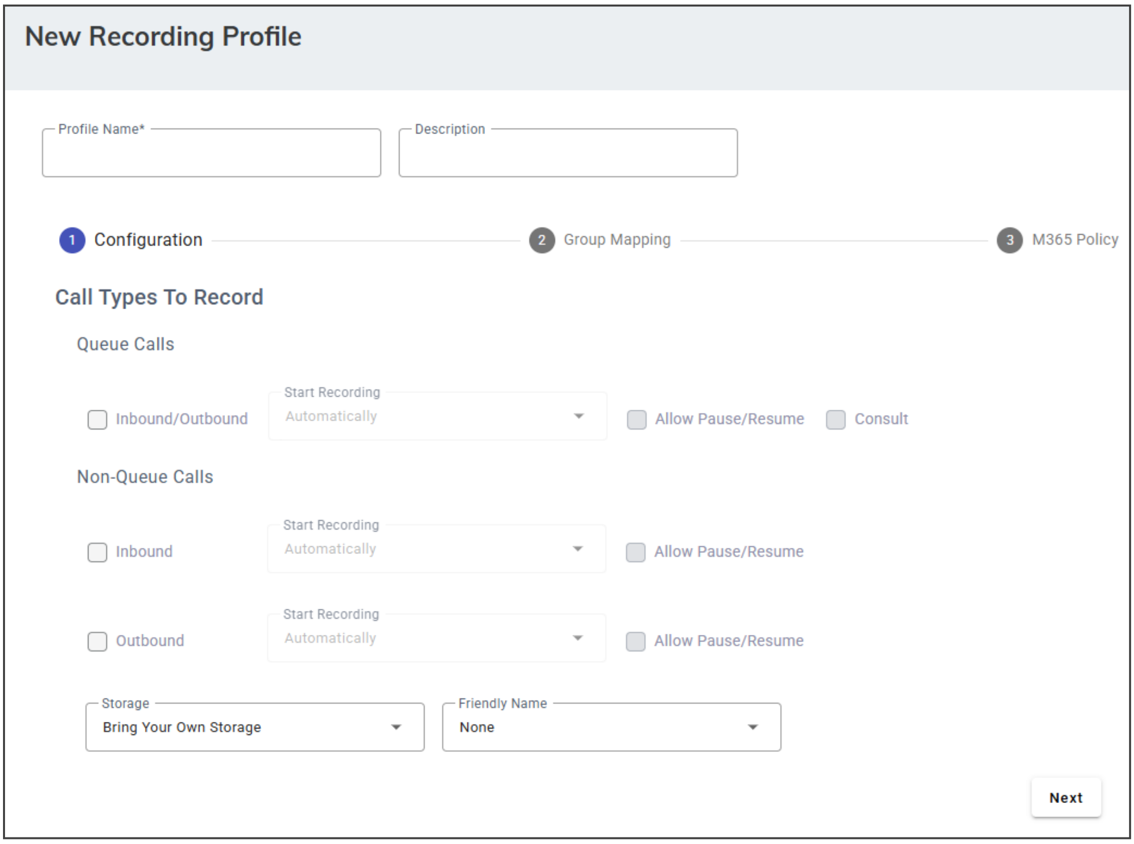
Calls received through Microsoft Teams are not recorded.

➢ **To add a Recording Profile:**

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

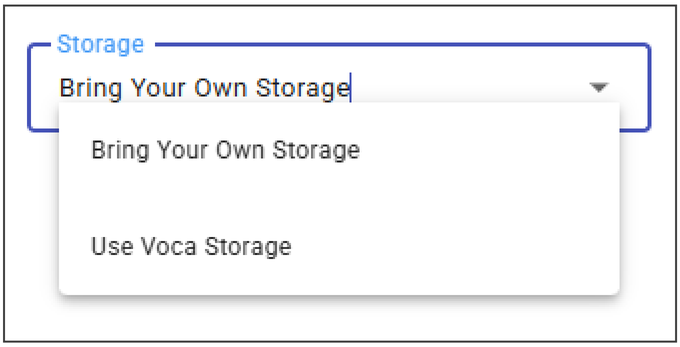


2. Click **Add New.**



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.**
   b. Choose whether recording will start **Manually** or **Automatically**.
   c. If you selected automatic recording, select **Allow Pause/Resume** to allow agents to pause or resume for compliance purposes. If you selected manual recording, **Allow Pause/Resume** is enabled by default 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.**
   b. Choose whether recording will start **Manually** or **Automatically**.
   c. If you selected automatic recording, select **Allow Pause/Resume** to allow agents to pause or resume for compliance purposes. If you selected manual recording, **Allow Pause/Resume** is enabled by default and cannot be changed.
   d. Select **Outbound**.
   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.

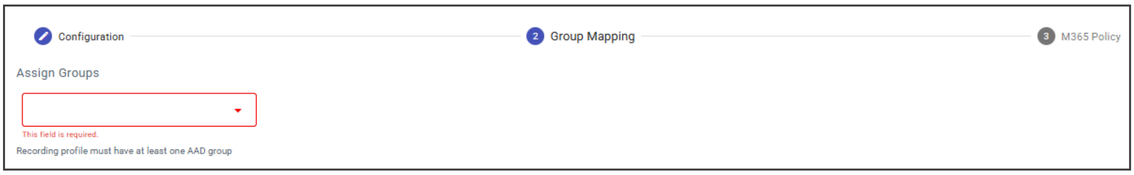


7. Select **Bring Your Own Storage** or **Use Voca Storage**.
8. If you selected Bring Your Own Storage, give your storage a name.

9. Select **Allow Agent Insights**.

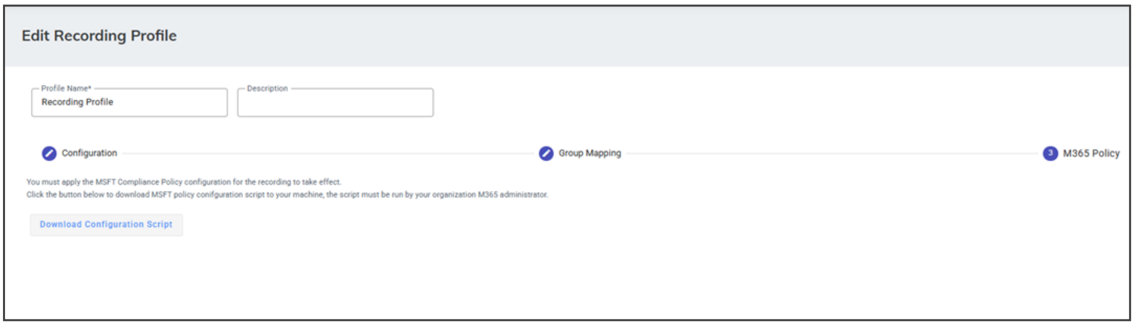
> This option (and related settings) is visible only if the tenant has the Agent Insight add-on.

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. 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 System Settings tab 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.

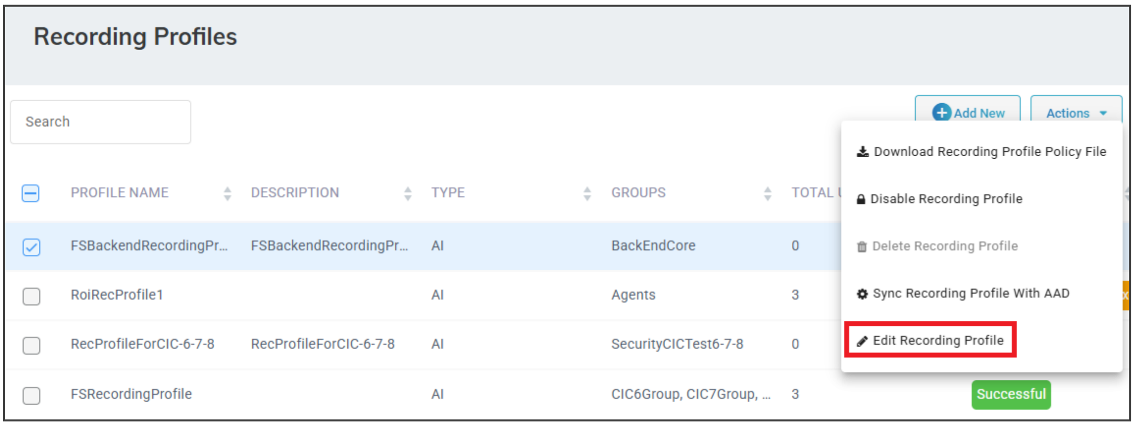
Editing a Recording Profile

The procedure below describes how to edit a Recording Profile.

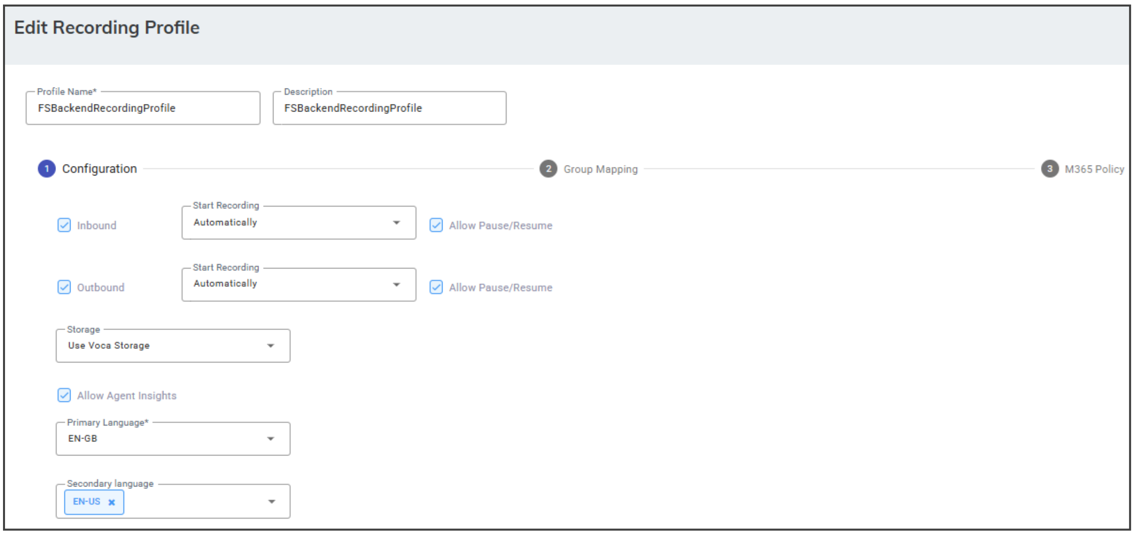
➢ To edit a Recording Profile:

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.



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



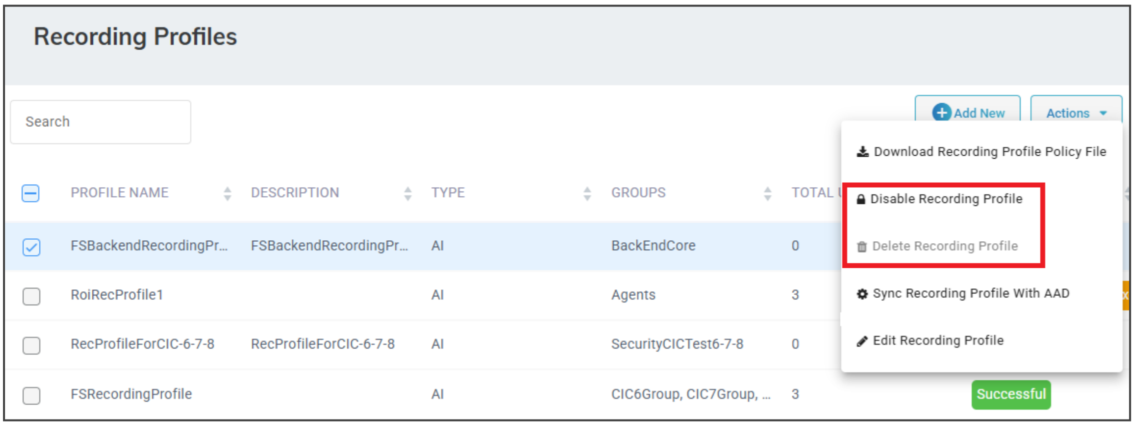
4. Make your necessary changes, and then click **Save Changes**.

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**).



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.

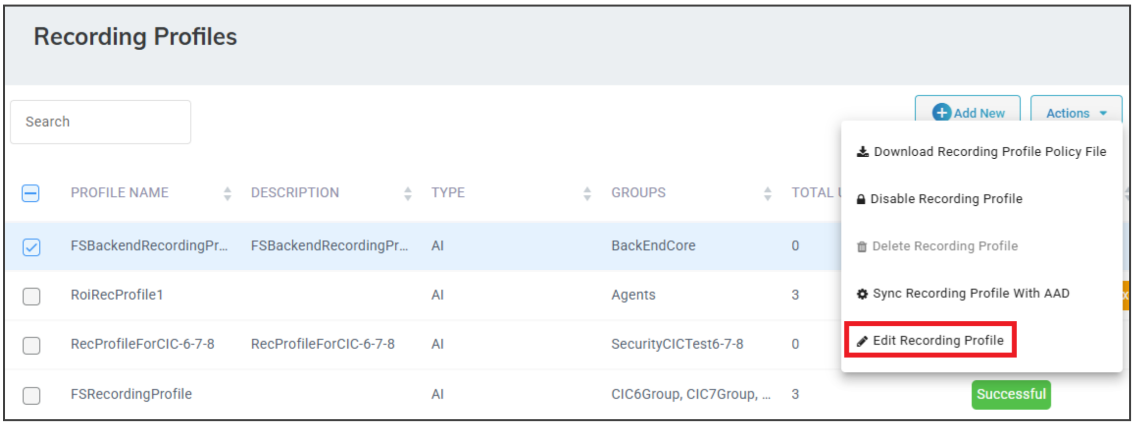
Additional Actions

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:



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

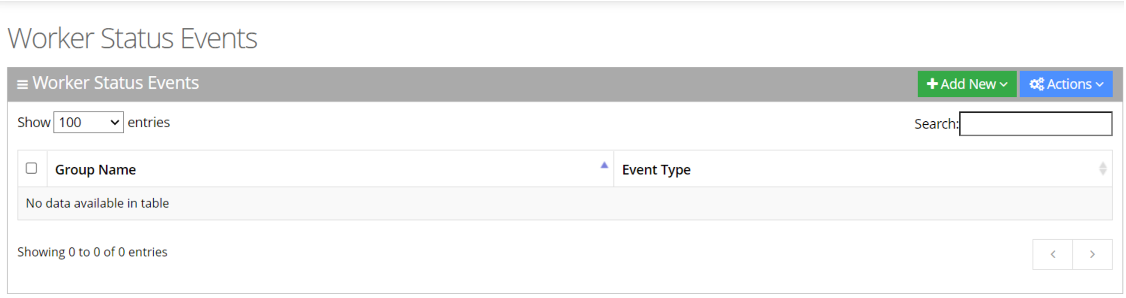
Adding Worker Status Events

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.

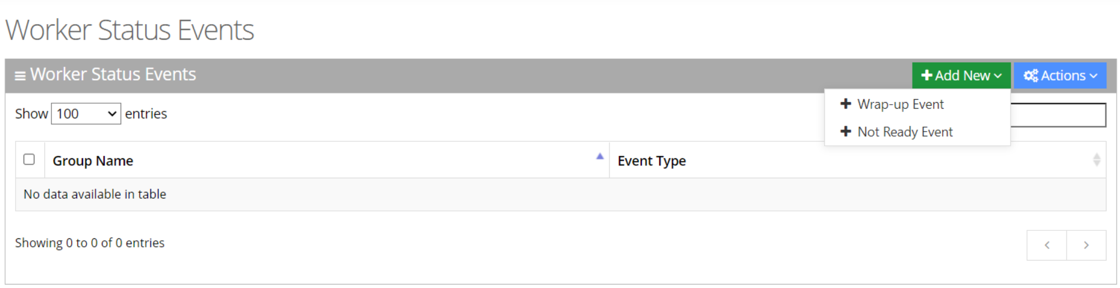
Add a Wrap-Up Event

➢ **To add a Wrap-up event:**

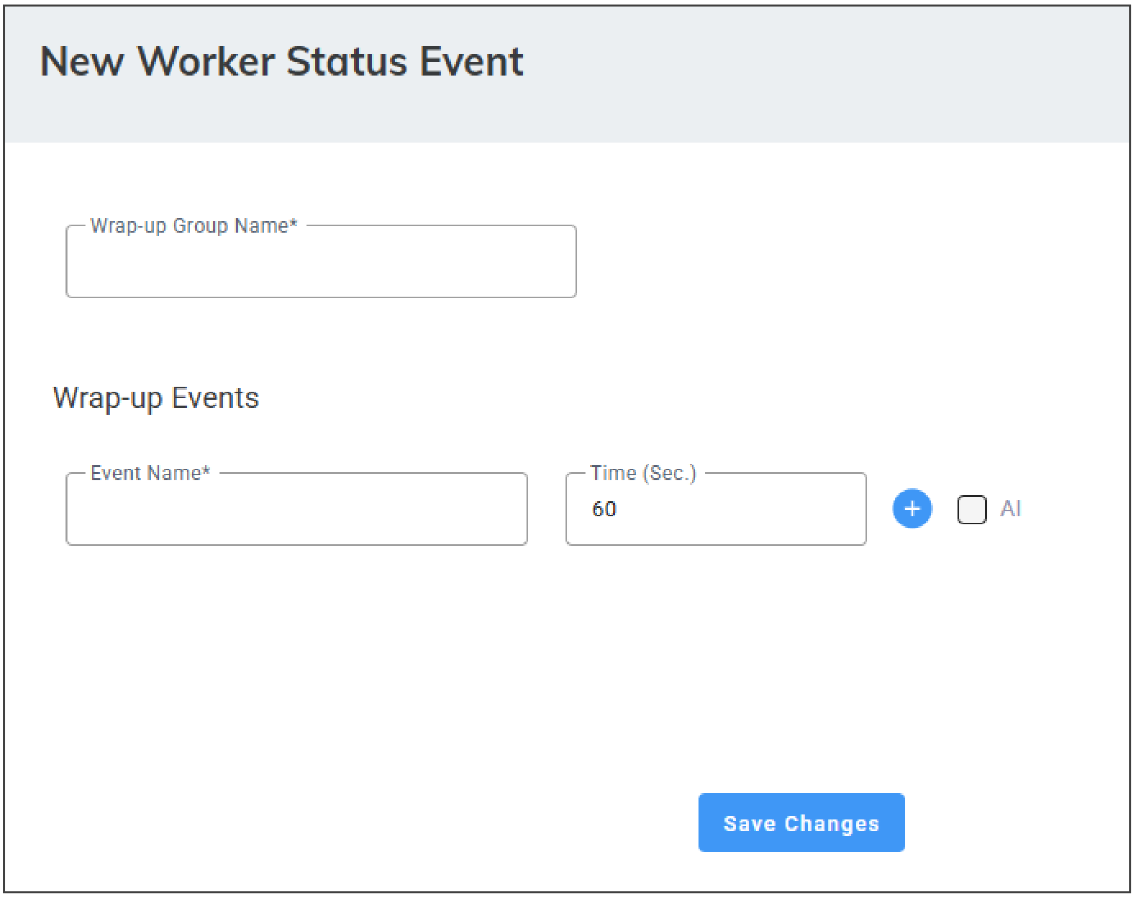
1. Open the Worker Status Events page (**Configuration** > **Routing** > **Worker Status Event**).



2. Click **Add new**.



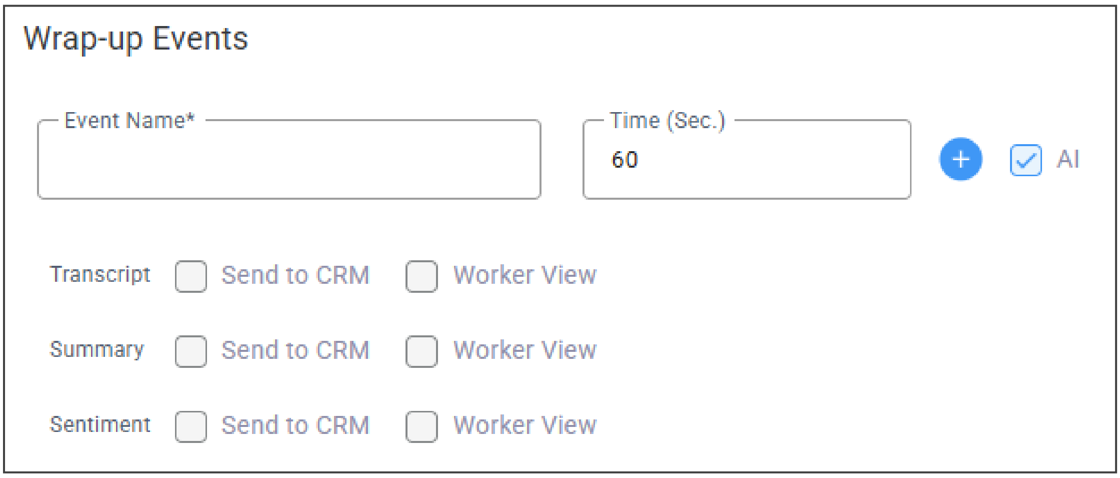
3. Select the **Wrap-up Event**.
4. In the **Wrap-up Event**, enter the 'Group Name' and 'Event Name' in the appropriate fields.



5. 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.

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

6. Admins can enable AI Wrap-Up, allowing agents to finish a call with AI-generated insights. If the tenant has the Agent Insights add-on, the **AI** checkbox will be visible. Select **AI**.



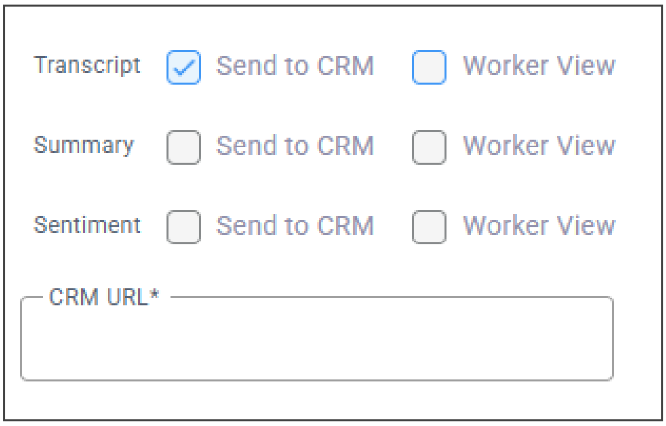
7. Configuration includes three components:

- '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.

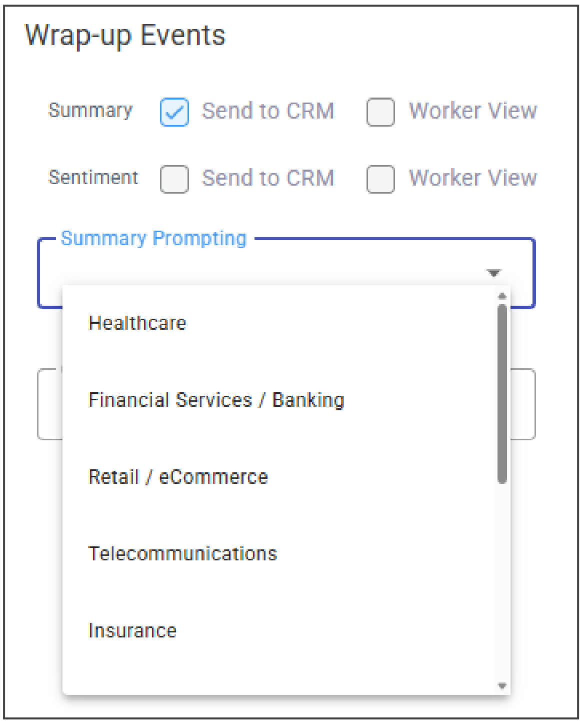
For each component, you can decide which information is sent to if the agent can view it.

a. Select **Send to CRM** - at the end of the call the information is sent to the CRM as a .json file.

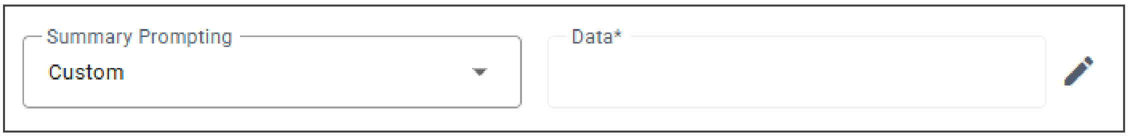
b. Select **Worker View**, and the worker (agent) will be able to view the transcript.



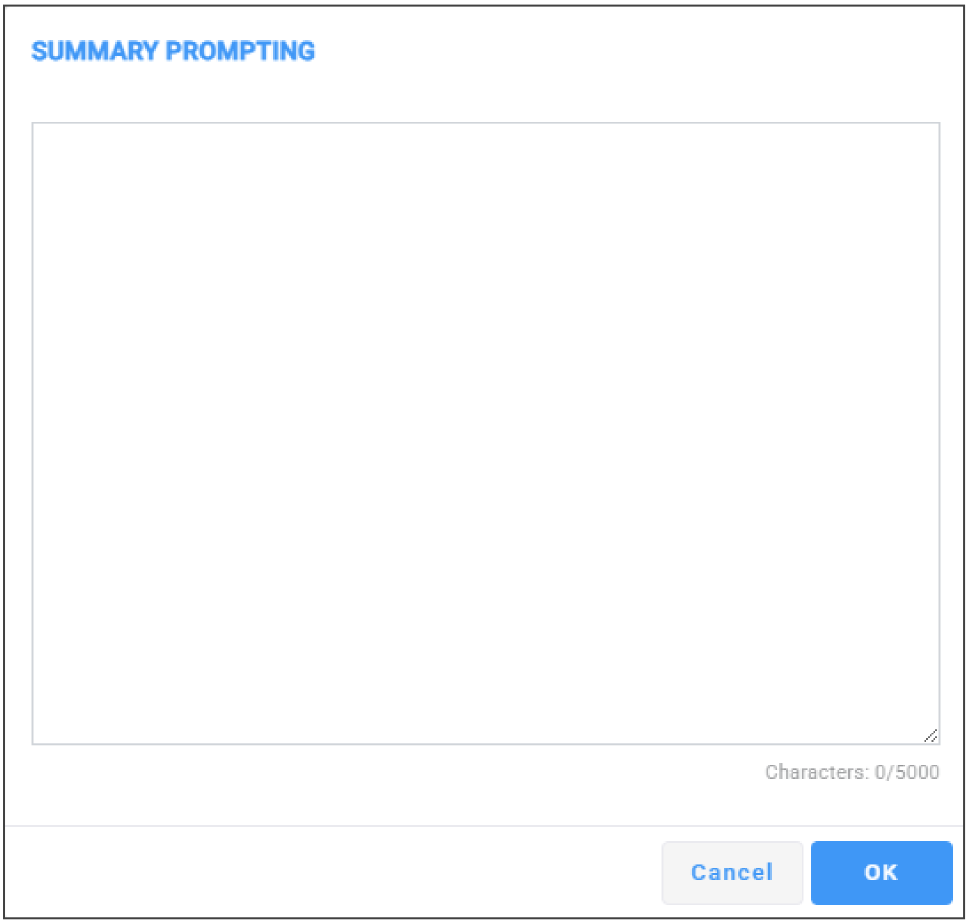
8. Enter the 'CRM URL'.
9. If you selected 'Summary', under 'Summary Prompting', select one of the top 10 predefined prompts. Voca uses the selected prompt to generate the conversation summary.



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



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



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

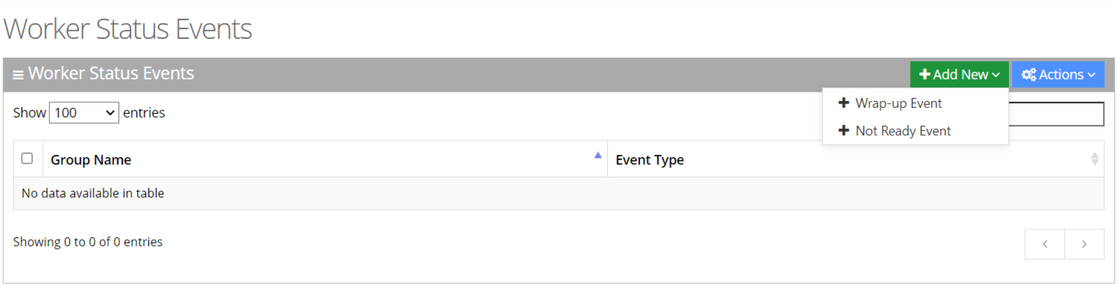
13. Click **Save Changes**.

Add a Not Ready Group Event

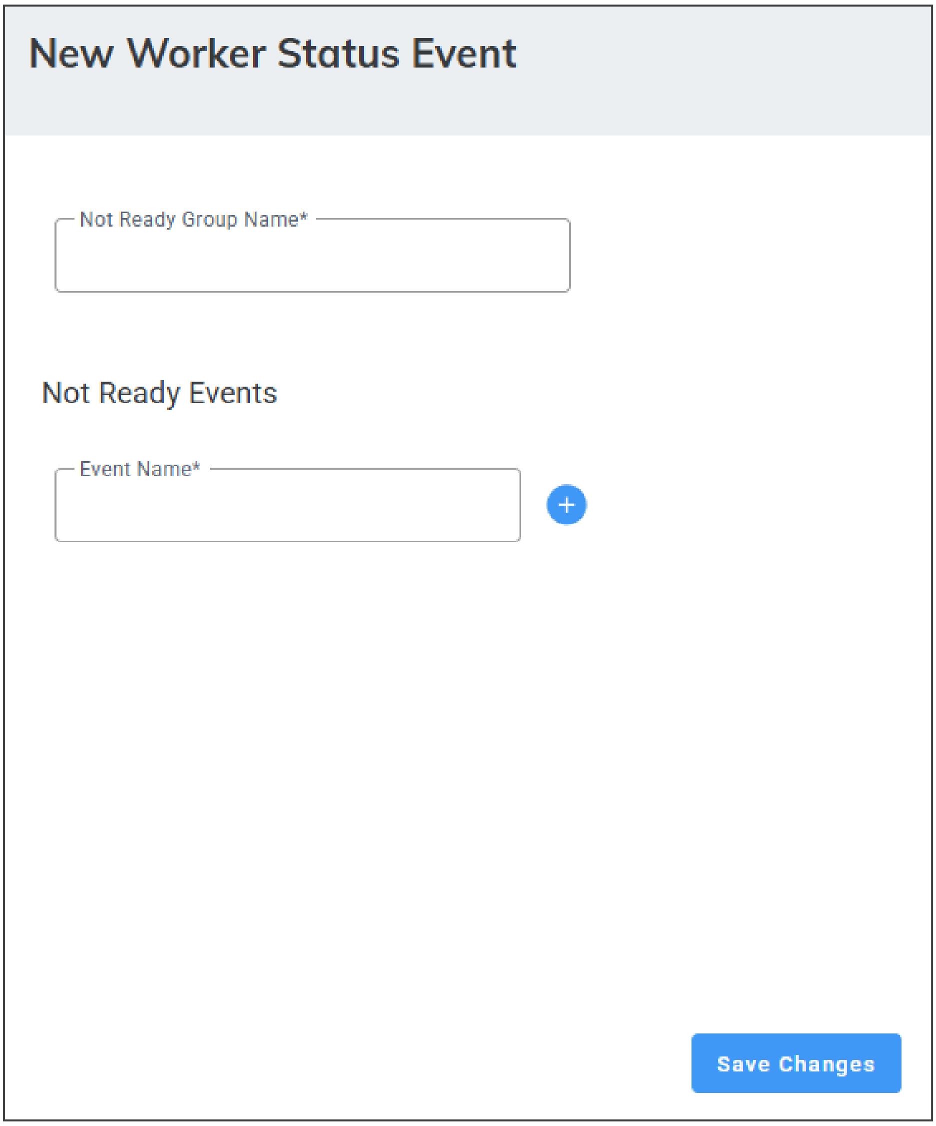
➢ **To add a Not Ready Group event:**

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

2. Click **Add new**.



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



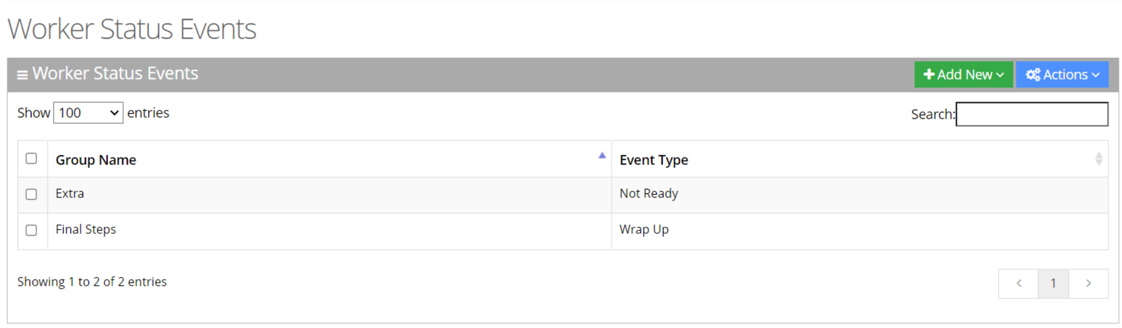
5. Click to add additional events.
6. Click **Save Changes**.

Editing Worker Status Events

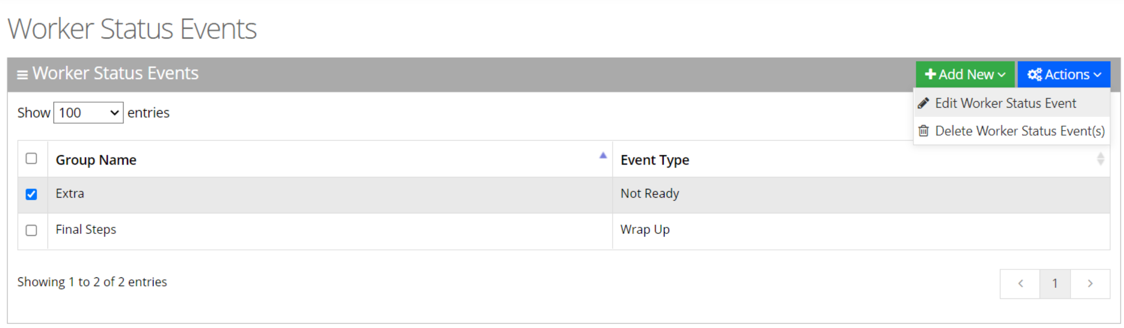
The procedure below describes how to edit a Worker Status Event.

➢ To edit a Worker Status Event:

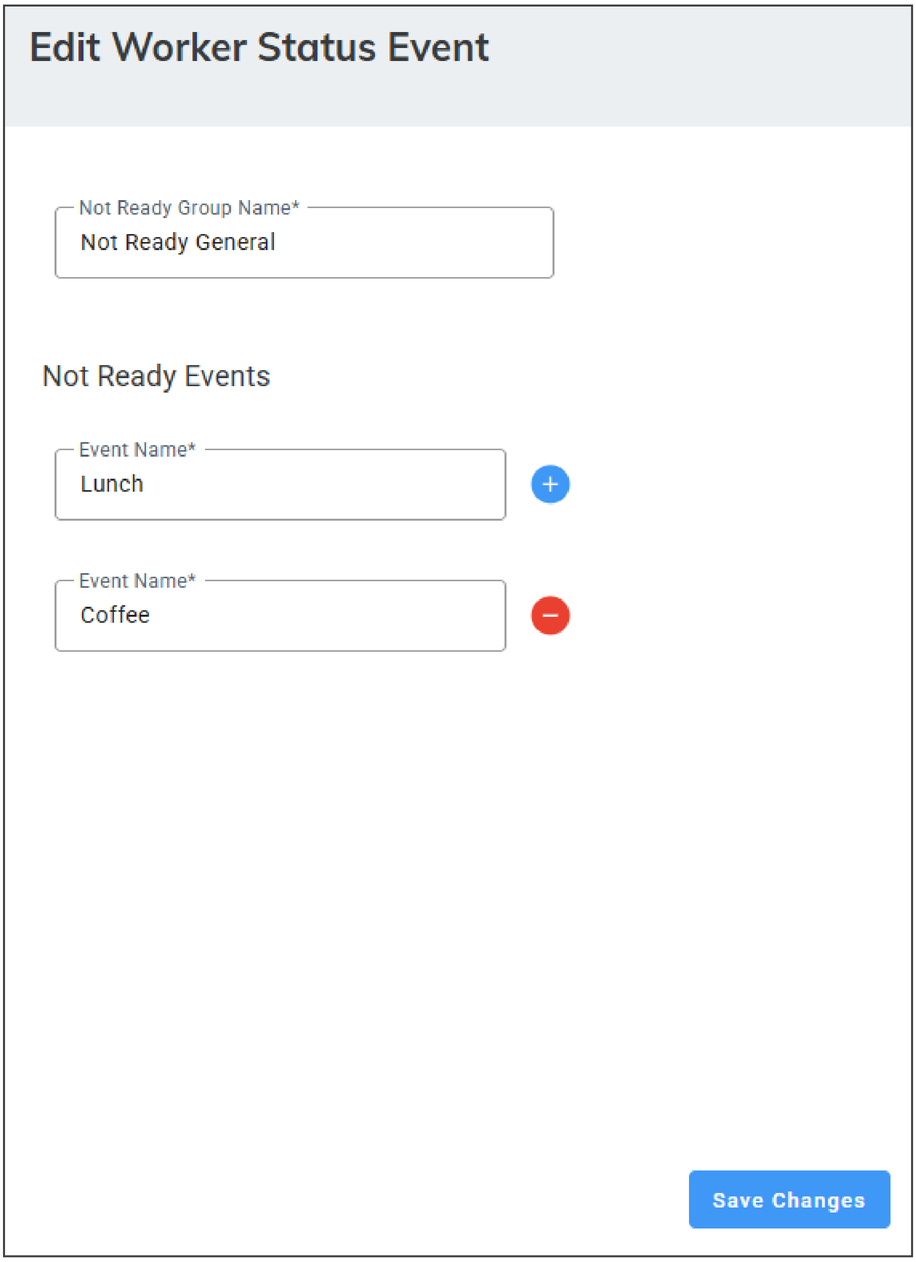
1. Open the Worker Status Events page (**Configuration** > **Routing** > **Worker Status Events**); the following appears:



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



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



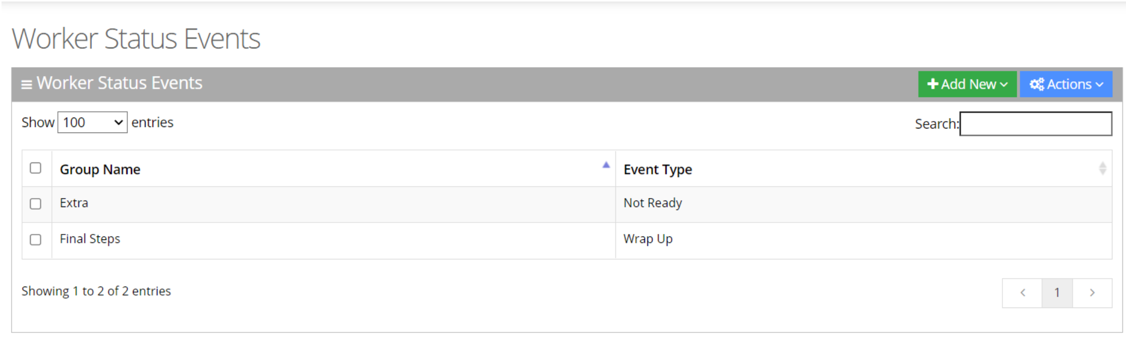
4. Make your necessary changes, and then click **Save Changes**.

Deleting Worker Status Events

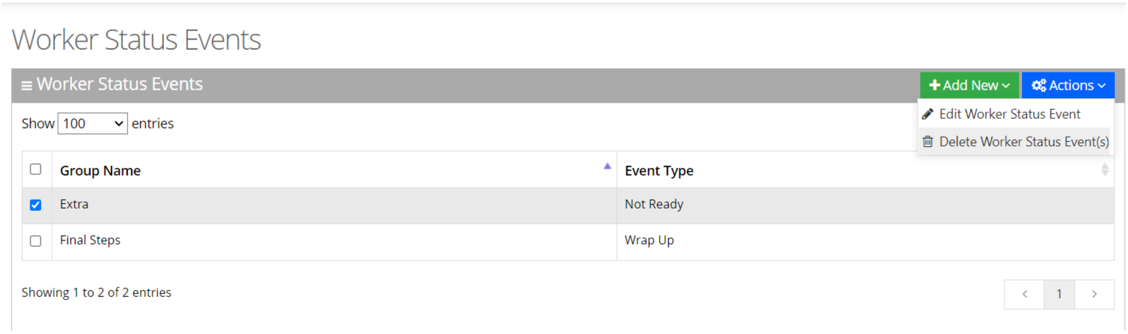
The procedure below describes how to delete a Worker Status Event.

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

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



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



A confirmation message box appears.

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

Configuring 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

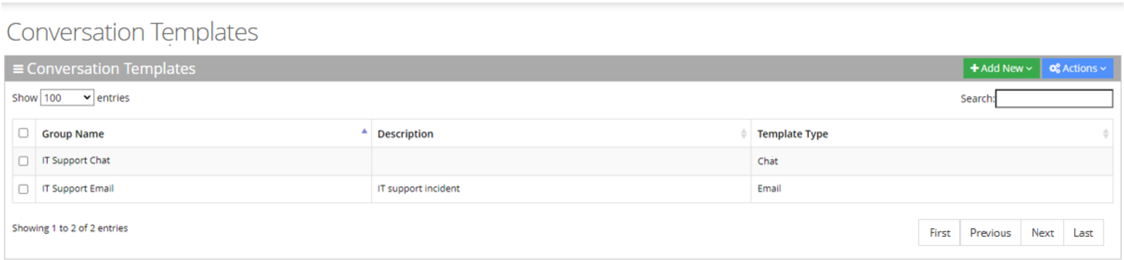
This section describes how to add a Conversation Template for email and chat interactions.

Adding an Email Conversation Template

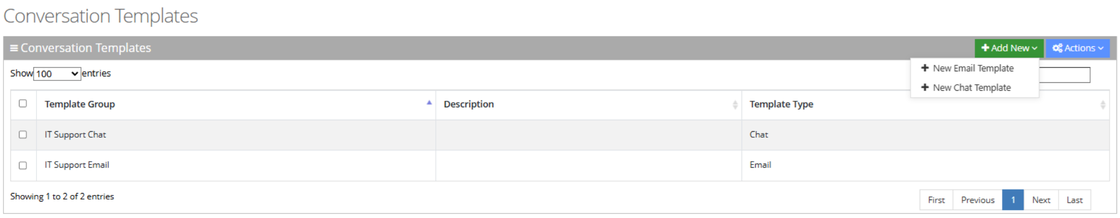
The procedure below describes how to add an Email Conversation Template.

➢ **To add an Email Conversation Template:**

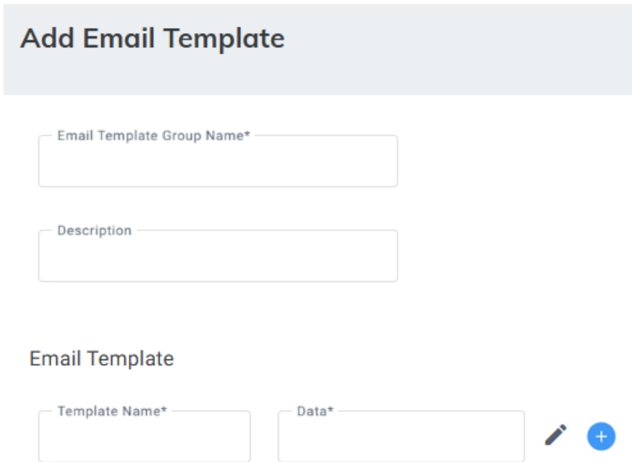
1. Open the Conversation Templates page (**Configuration** > **Routing** > **Conversation Templates**); the following appears:



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



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



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**.

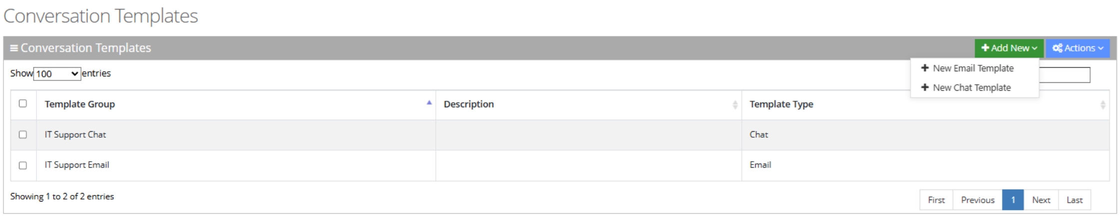
Adding a Chat Conversation Template

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

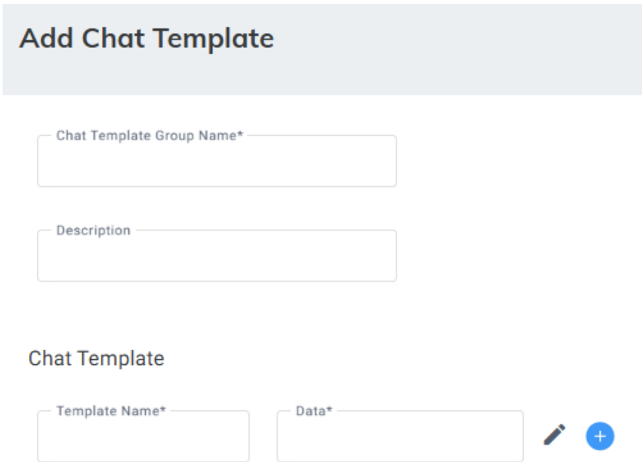
➢ To add a Chat Conversation Template:

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:



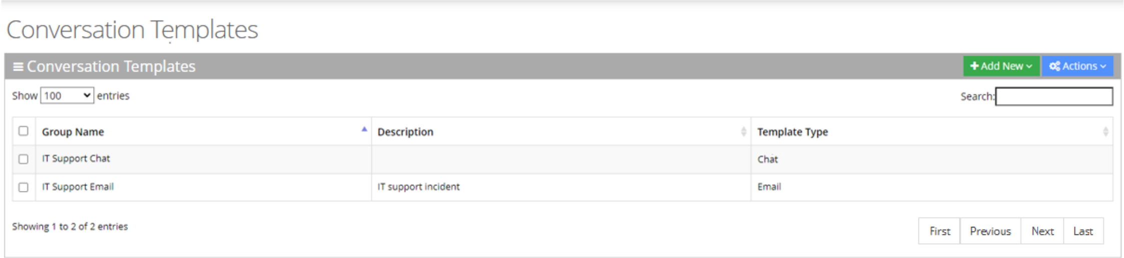
4. In the ‘Chat Template Group Name’ field, type a name for the template group.
5. In the 'Description' field, type a description for the template group.
6. Under Chat Template, in the ‘Template Name’ field, type a name for the template.
7. Click the 'Data' field to add the template's content.
8. To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

Editing Conversation Template

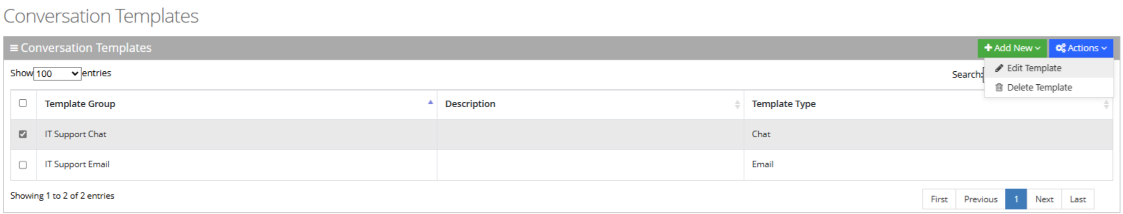
The procedure below describes how to edit a Conversation Template.

➢ To edit a Conversation Template:

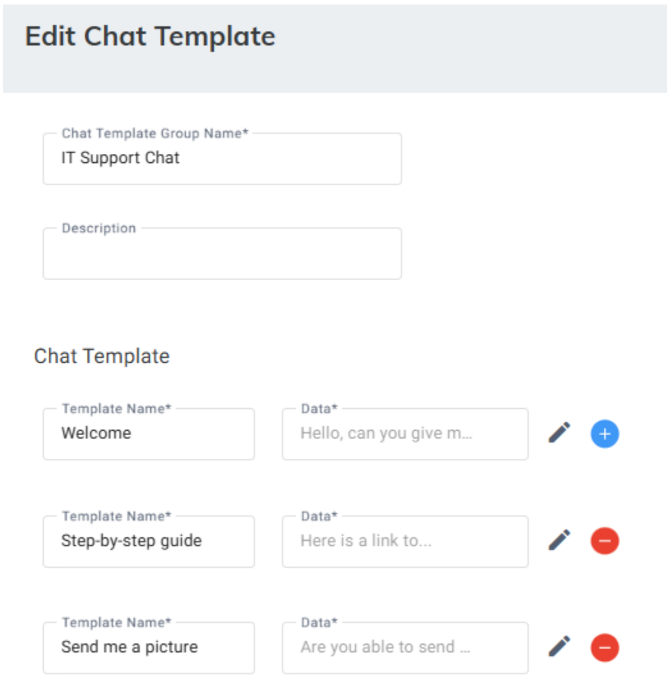
1. Open the Conversation Templates page (**Configuration** > **Routing** > **Conversation Templates**); the following appears:



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):



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

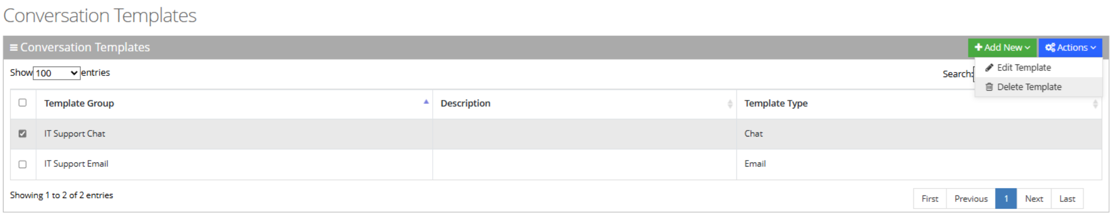
Deleting a Conversation Template

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:

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



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.

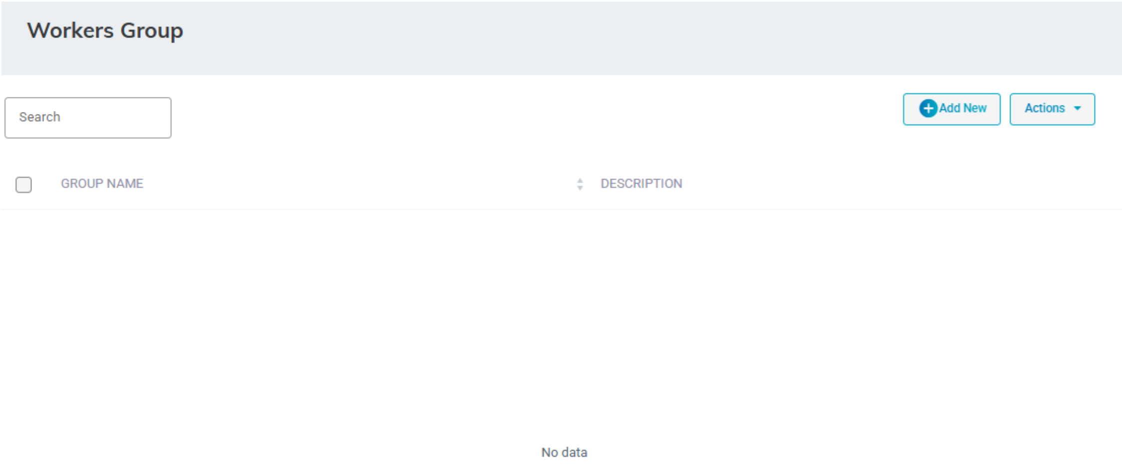
- Workers can be assigned to only one group.
- A Worker Group can only contain one Not-Ready Status event.

Adding a Workers Group

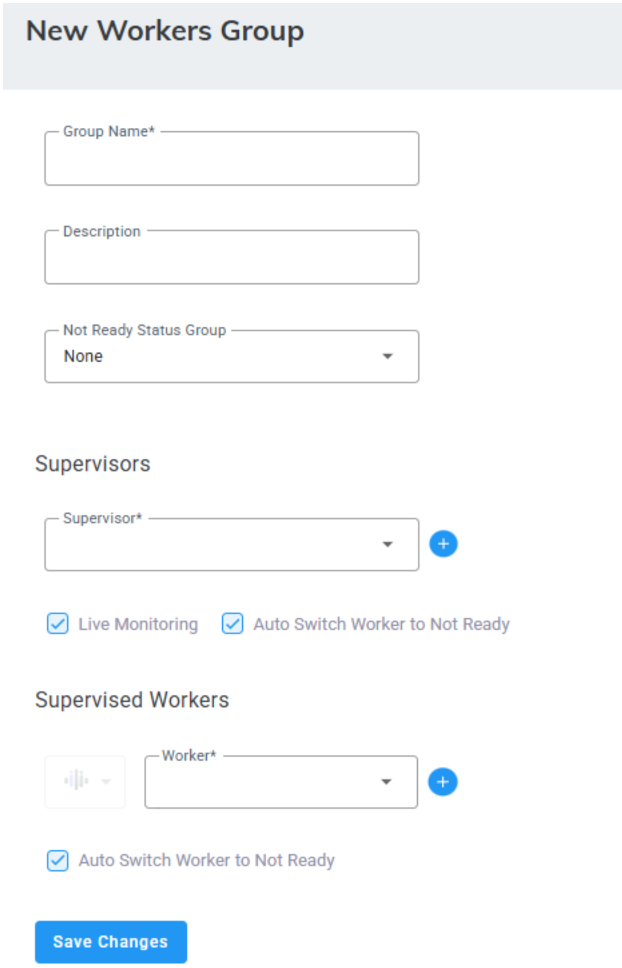
The procedure below describes how to add a Workers Group.

➢ To add a Workers Group:

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



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



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

7. 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.

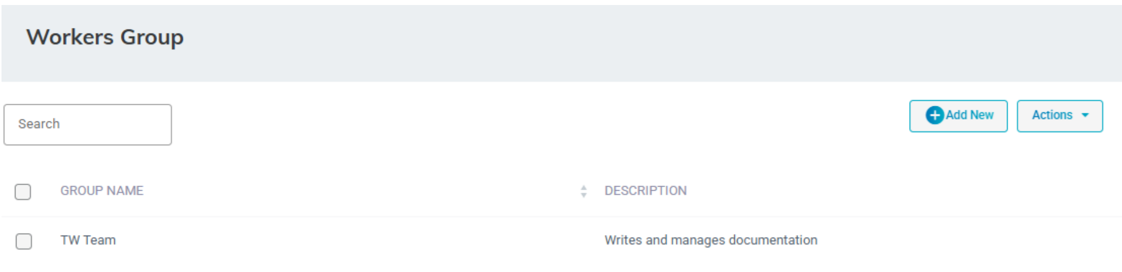
10. Click + to add additional Supervisors or Workers.
11. Click **Save Changes**.

Editing a Workers Group

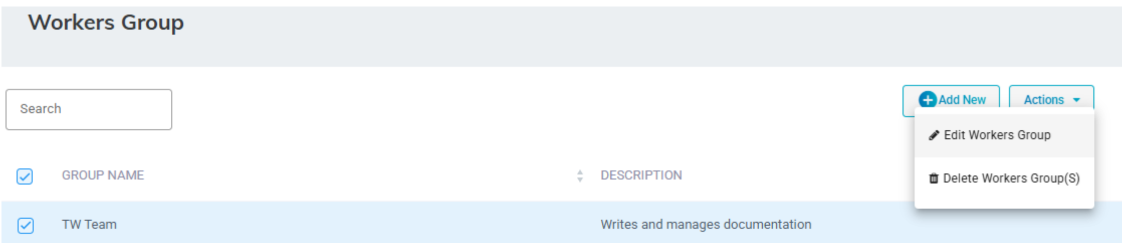
The procedure below describes how to edit a Workers Group.

➢ To edit a Workers Group:

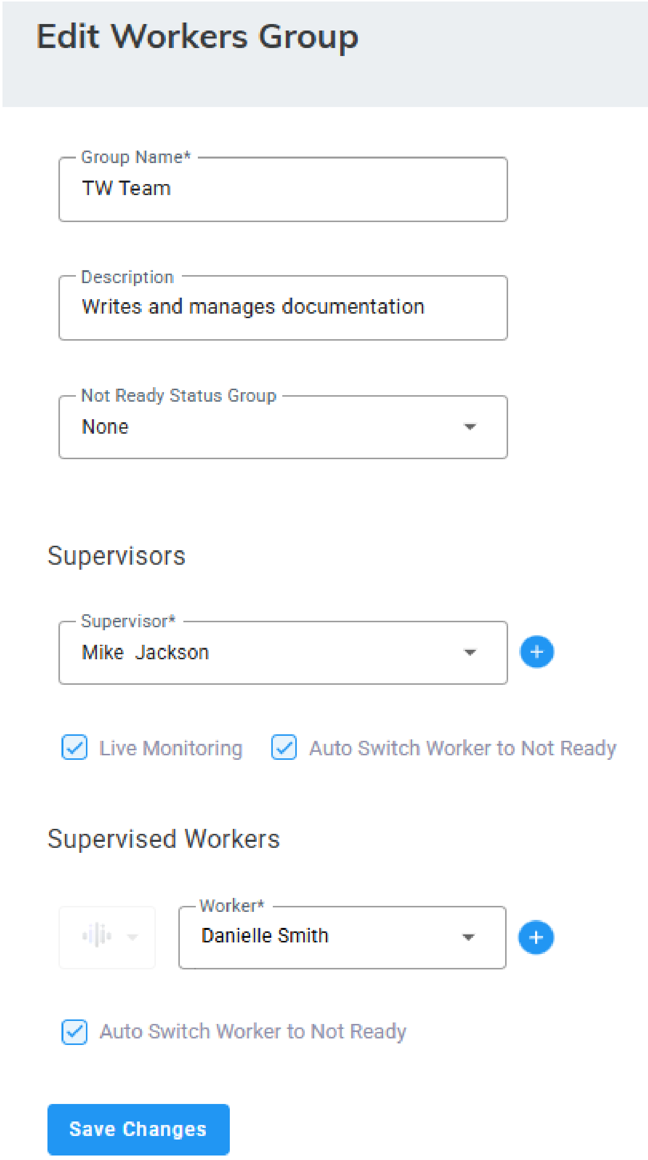
1. Open the Workers Group page (**Configuration** > **Routing** > **Workers Group**); the following appears:



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



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



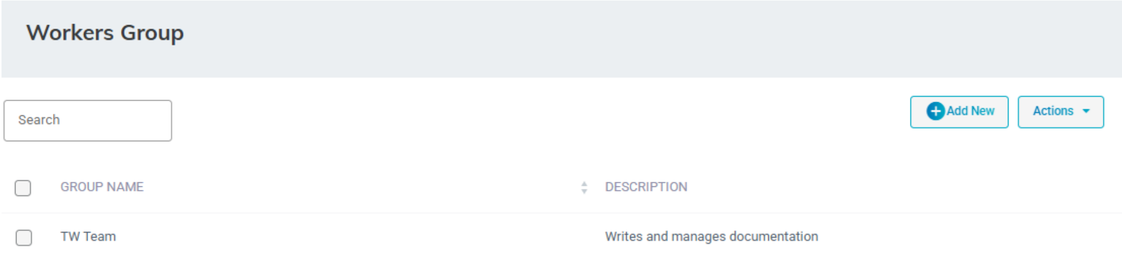
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Workers Group

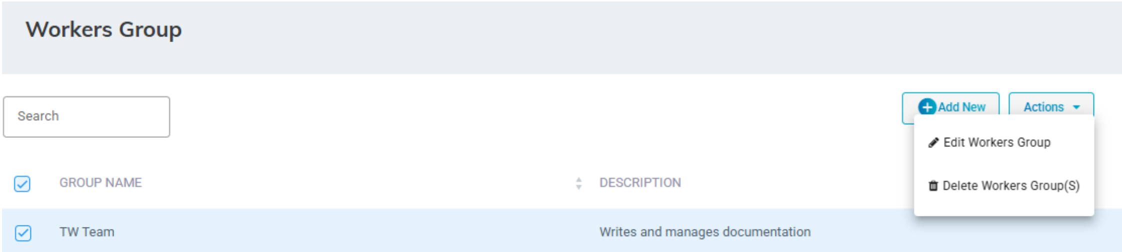
The procedure below describes how to delete a Workers Group.

➢ 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.

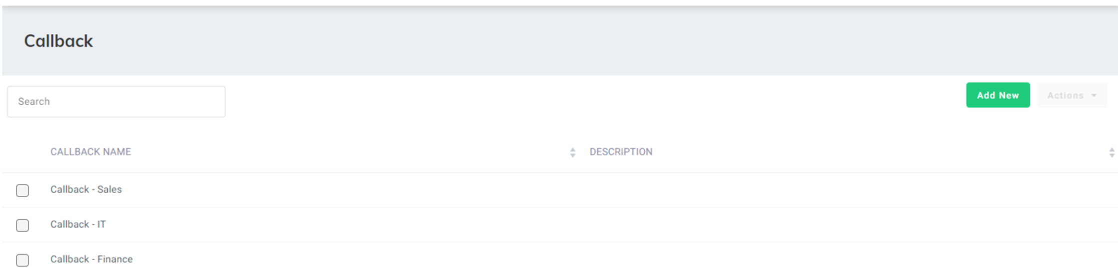
- Callback instances implementation is within the ‘In Queue Settings’ in the Skill Based Queue configuration.
- You can use one Callback instance for multiple Skill Based Queues, or create several.

Adding a Callback

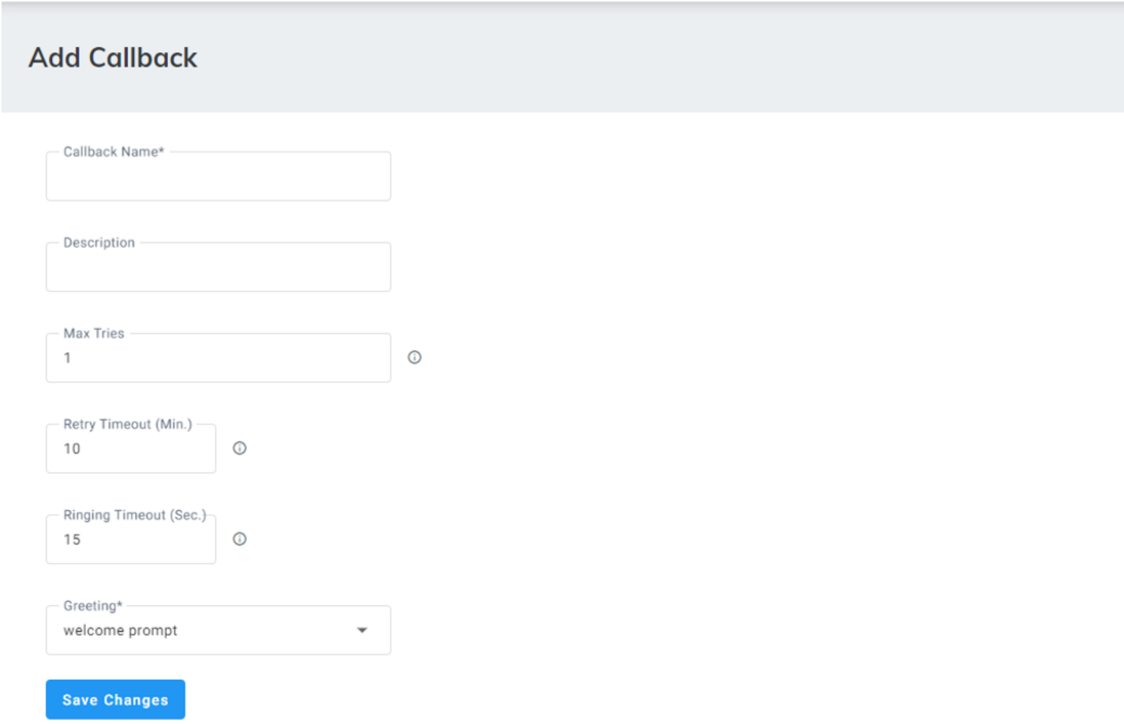
The procedure below describes how to add a Callback.

➢ **To add a Callback:**

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



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



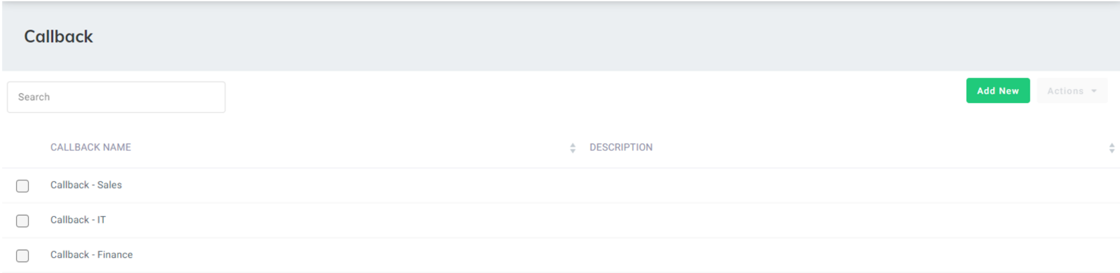
3. In the 'Callback Name' field, enter the name of the Callback.
4. In the 'Description' field, enter a description of the Callback.
5. In the 'Max Retries' field, enter the maximum number of callbacks that will be attempted to reach a caller.
6. In the 'Retry Timeout (Min.)' field, enter the number 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

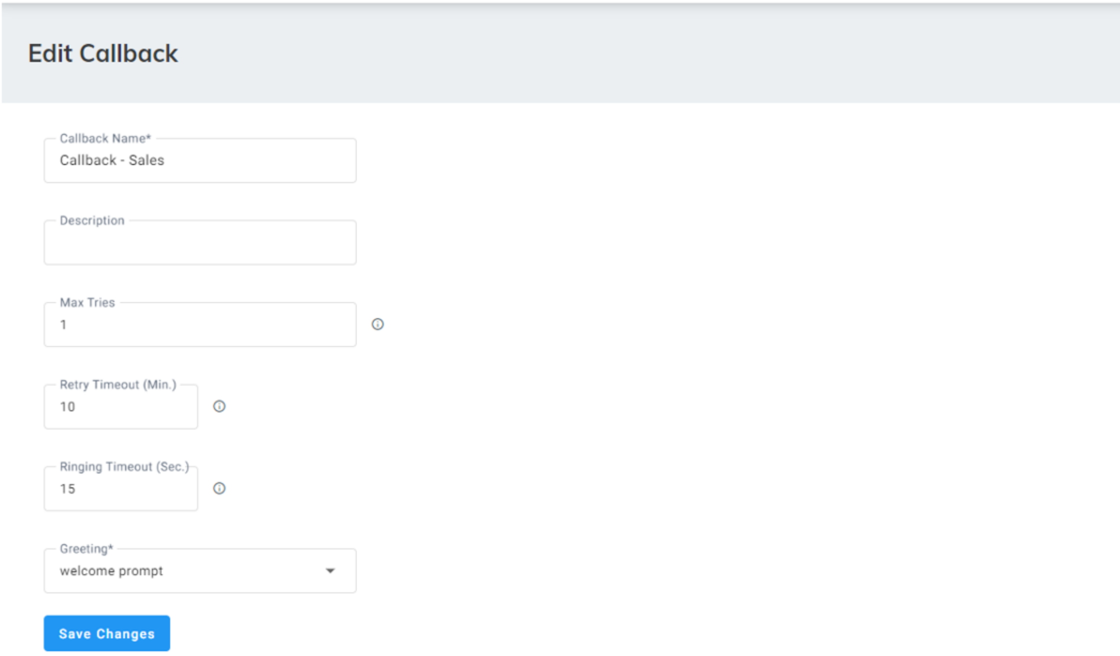
The procedure below describes how to edit a Callback.

➢ **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:



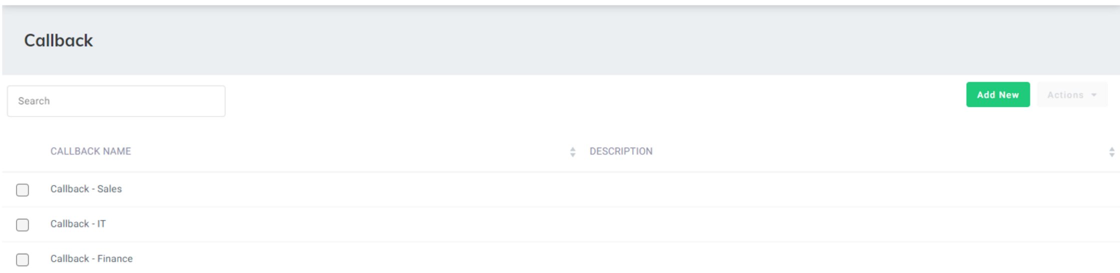
4. Make your necessary changes, and then click **Save Changes**.

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

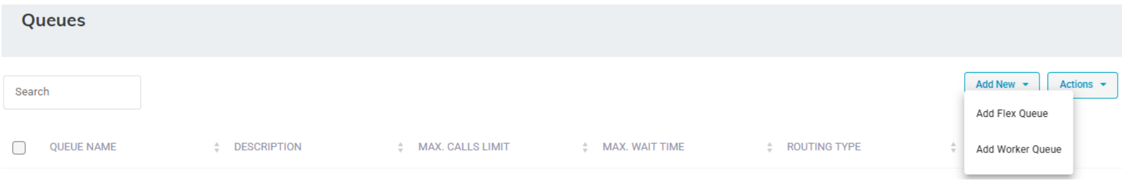
Flex Queues provide the ability to place an incoming call in a queue before transferring it to one of its destination lists. When the call is in a queue, the caller hears music on hold. The system supports defining several call queues per customer or service.

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

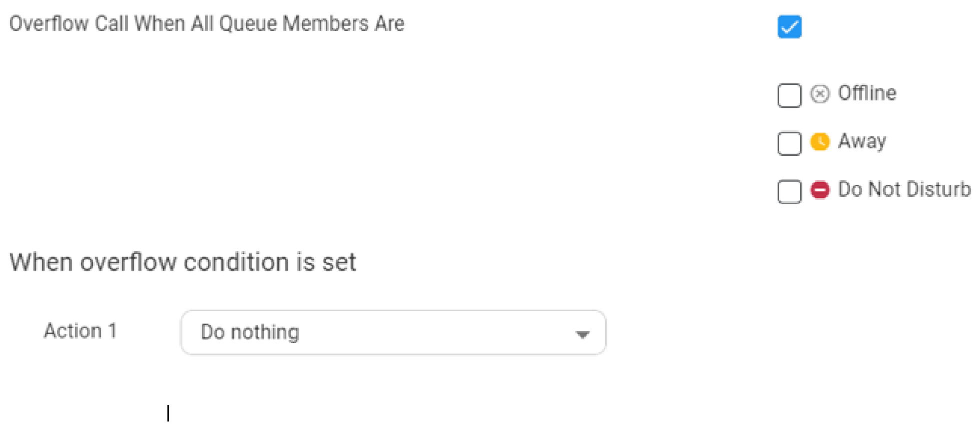
8. In the 'No Answer Timeout(Sec.)' field, enter the ringing time at the destination after which the call is considered as not answered by the destination.

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.

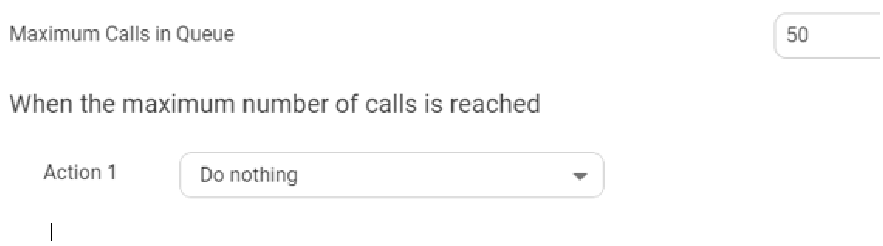
11. In the 'Allow Routing on Teams Presence Status' check box, enable or disable for which Teams Presence Status the call should transfer. Available is always marked for transfer.

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'.



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'.

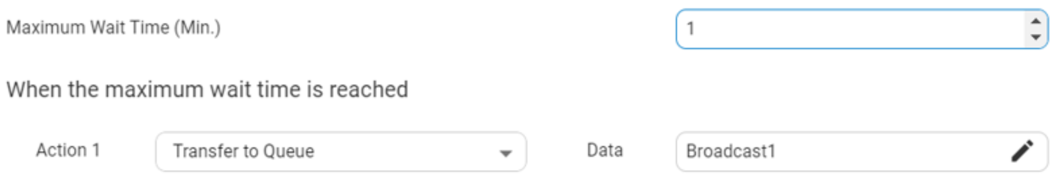


For more information of the possible Actions, see Actions.

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

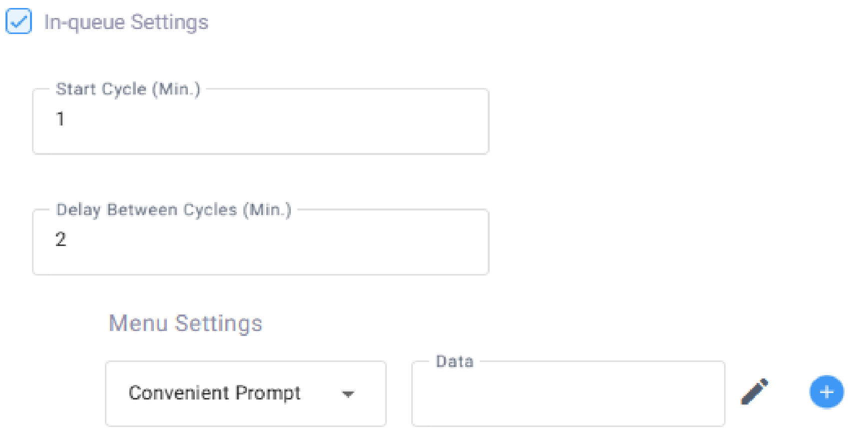
14. In the 'Maximum Wait Time (Min.)' field, enter the maximum time for a call to be waiting in the queue. When the maximum wait time has been reached, the caller will automatically

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



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:

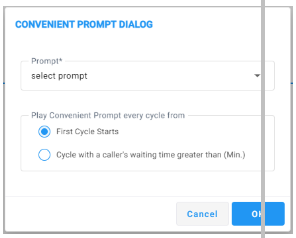


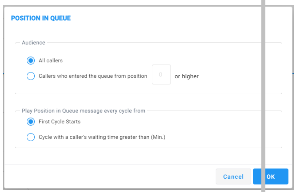
a. In the ‘Start Cycle’ field, enter the duration (in minutes) that the basic ‘music on hold’ is played to the caller, before playing the set of in-queue actions to the caller.

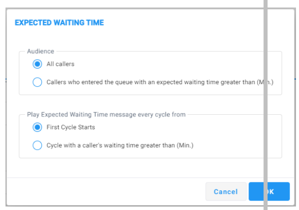
b. In the ‘Delay Between Cycles’ field, enter the duration (in minutes) that the basic ‘music on hold’ is played to the caller after the current set of in-queue actions and before the next set of in-queue actions begins.

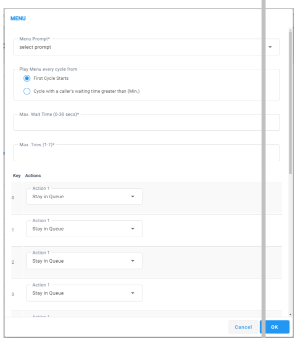
c. Under **Menu Settings**, select the actions and options that are played / offered when in-queue. Their order from top to bottom is the order in which they are played during the cycle. You can change the order by dragging and dropping each item.

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
		 **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: ✓ **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.
Position in Queue	This prompt informs callers about their position in the queue.	**1.** Click the ‘Data’ field's icon; the following appears:

From drop-down list, select	Description	Edit fields
		 2. Under the **Audience** group, choose which callers will hear this prompt: ✓ **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 3. Under the **Play Position in Queue message every cycle from** group, select one of the following options: ✓ **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.
Expected Waiting Time	This prompt inform callers about their estimated waiting time in the queue.	**1.** Click the 'Data' field's icon; the following appears:  **2.** Under the **Audi-ence** group, choose which callers will hear this prompt: ✓ **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 **3.** Under the **Play Expected Waiting Time every cycle from** group, select one of the following options: ✓ **First Cycle Starts** ✓ **Cycle with a caller's waiting time greater than** - prompt

From drop-down list, select	Description	Edit fields
		starts playing in the cycle that is equal to or greater than the time configured in this field
Menu	Configure an in-queue DTMF menu to allow callers to make actions during their in-queue waiting time.	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.  2. Under the **Play Menu every cycle from** group, select one of the following options: ✓ **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
		time configured in this field. **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: ✓ **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
		calls them back. **6.** For more information on the above actions, see Actions on page 276.

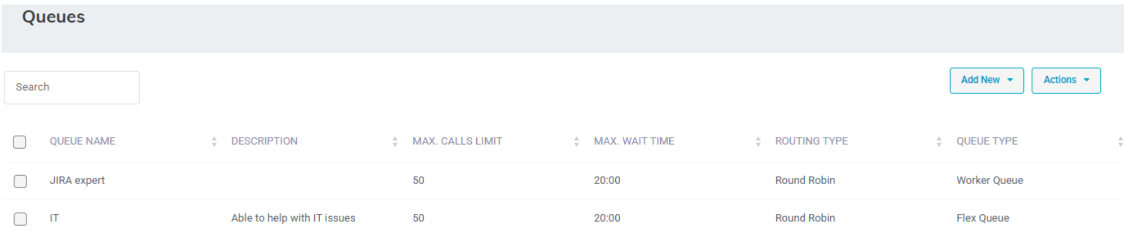
16. Click **Save Changes**.

Editing Flex Queues

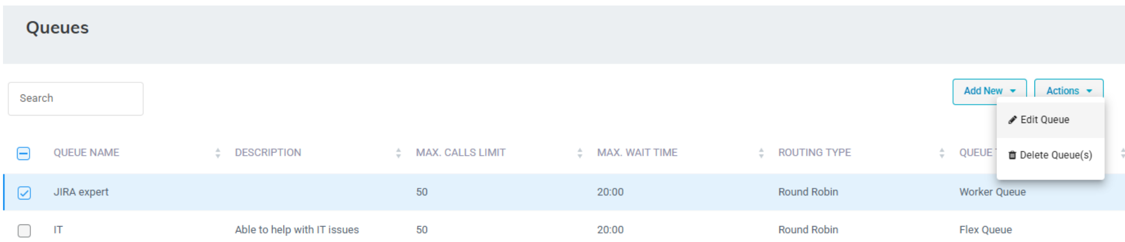
The procedure below describes how to edit a Flex Queue.

➢ To edit a Flex Queue:

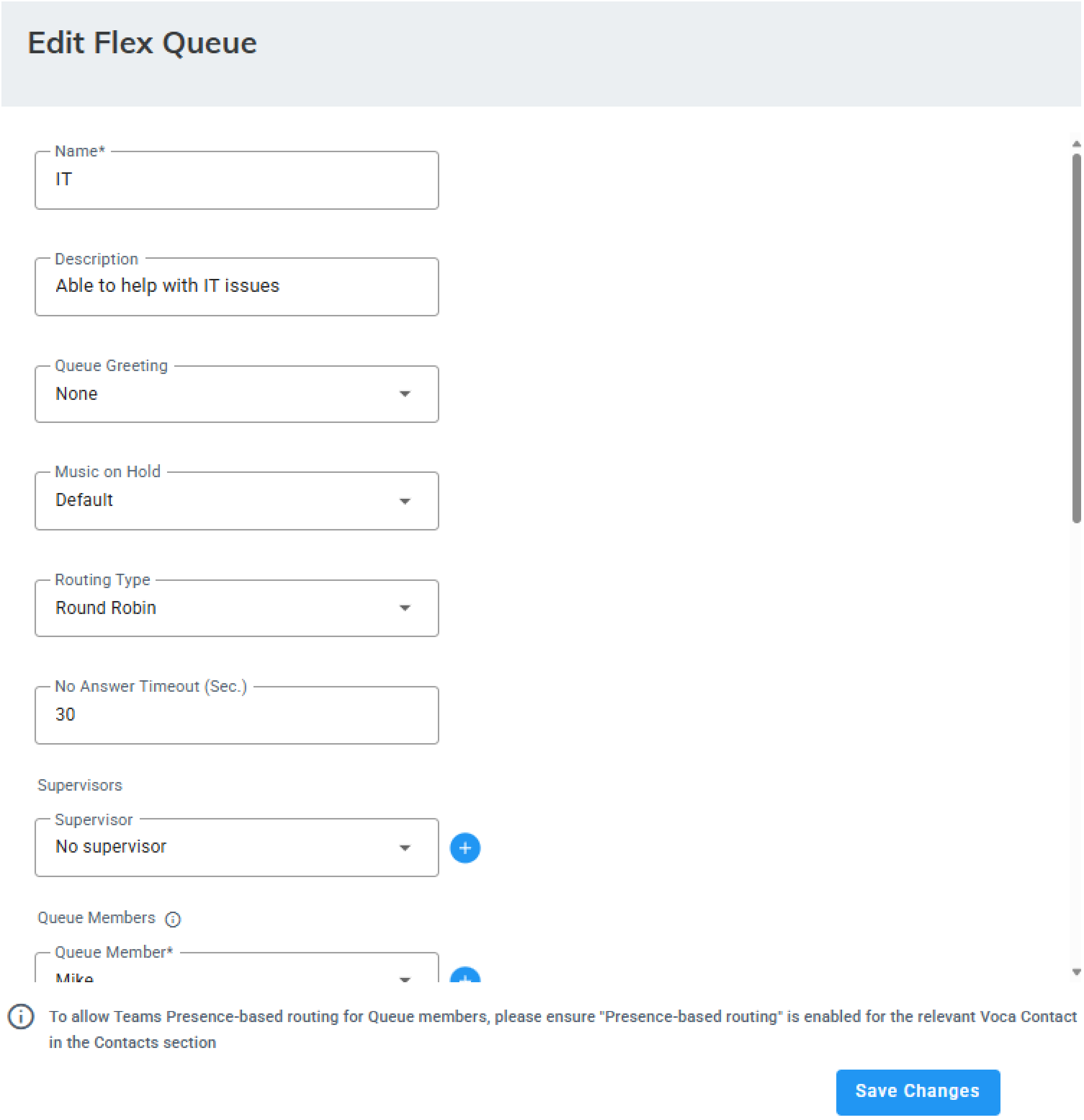
1. Open the Queues page (**Configuration** > **Routing** > **Queues**); the following appears:



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



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



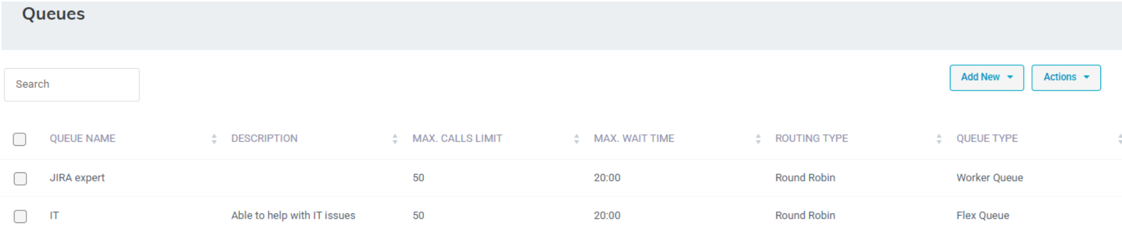
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Flex Queue

The procedure below describes how to delete a Flex Queue.

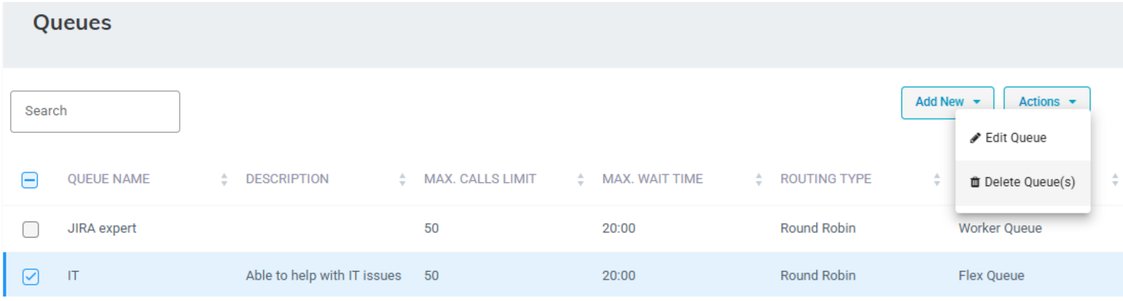
➢ To delete a Flex Queue:

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



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)**.



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.

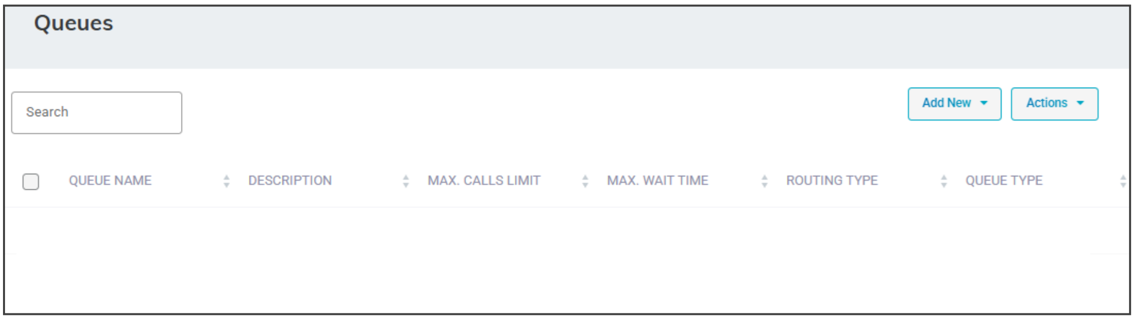
- Adding a worker queue for voice on the next page
- Adding a worker queue for email on page 137
- Adding a worker queue for chat on page 138

Adding a worker queue for voice

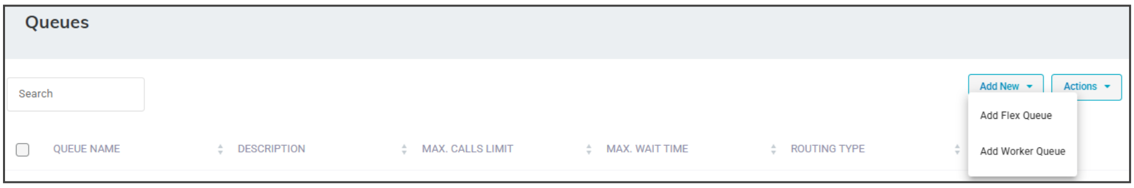
This procedure outlines the steps to create a new skill-based routing queue for voice, ensuring that incoming calls are directed to the most qualified agents based on predefined skill criteria.

➢ To add a new Worker Queue for voice:

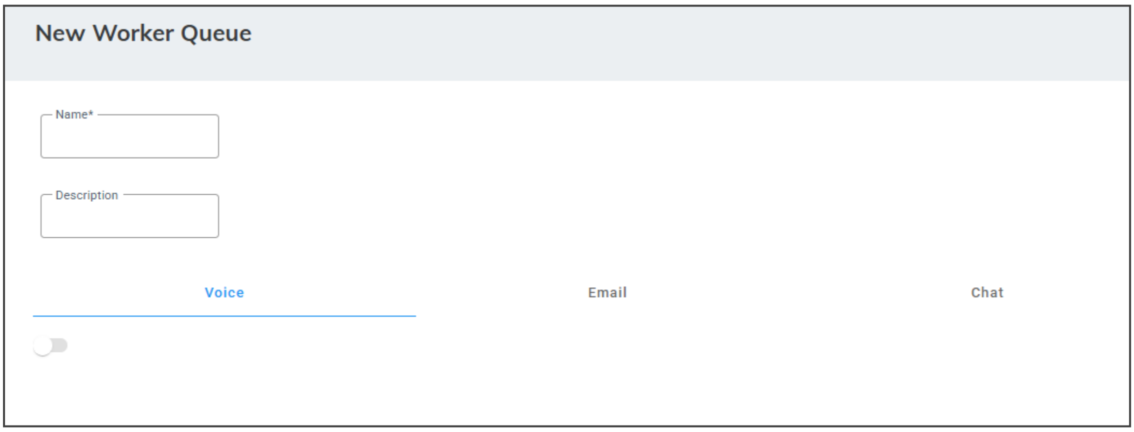
1. Open the Queues page (**Configuration** > **Routing > Queues**); the following appears:



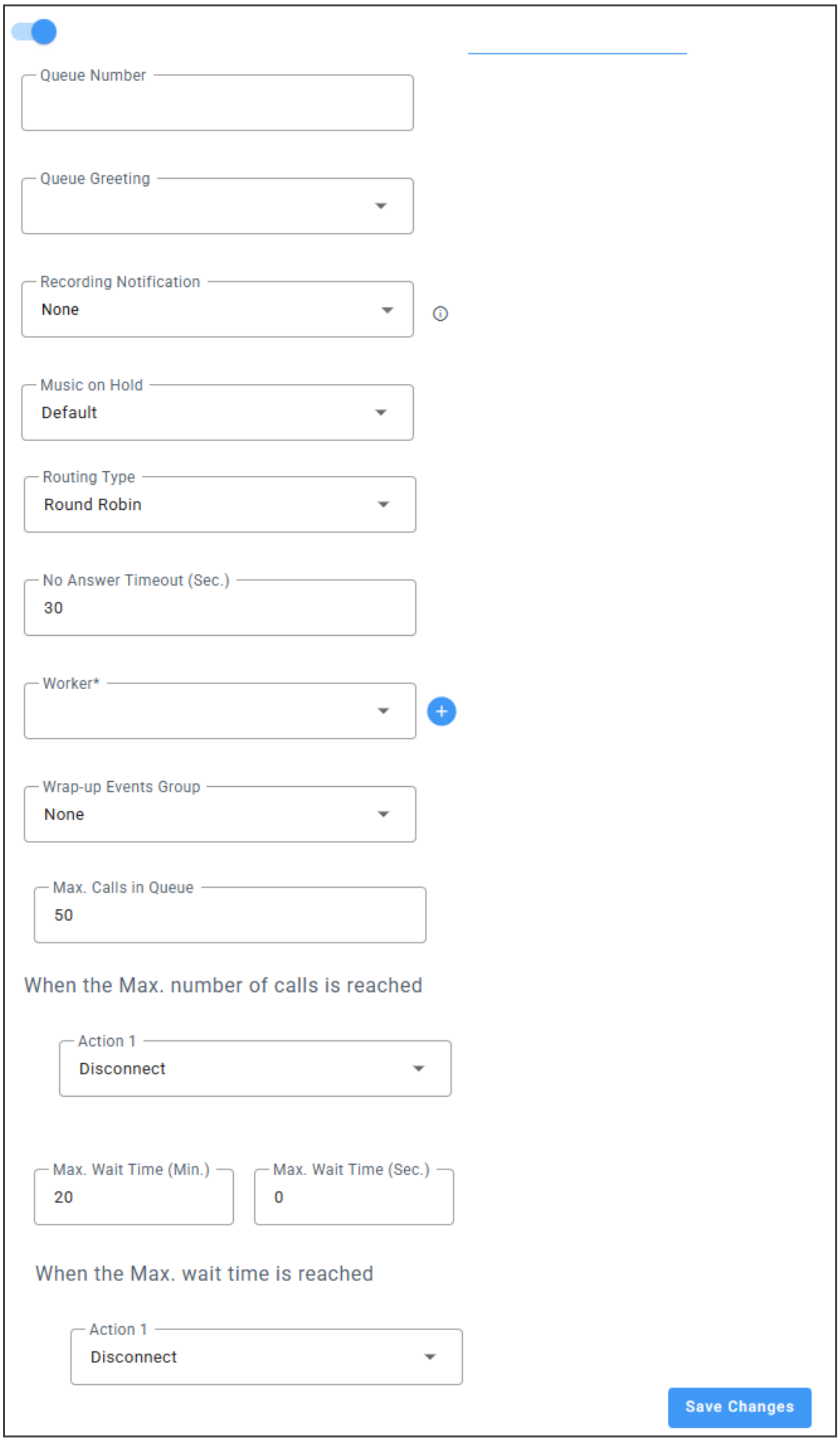
2. Click **Add New**; a drop-down menu appears:



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:



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.

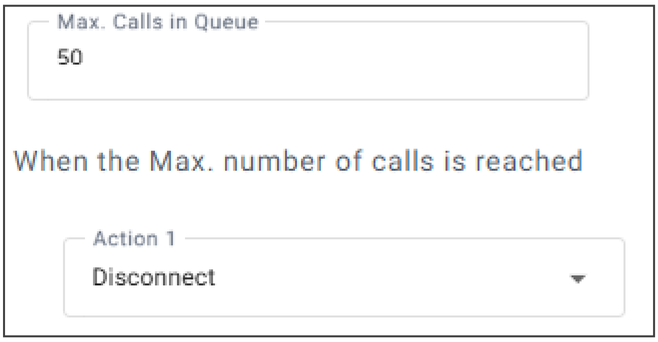
From the 'Recording Notification' drop-down list, select **Calls may be recorded** or **Calls may be recorded and analyzed by AI**. Select **None** if you don't want to notify callers.

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.

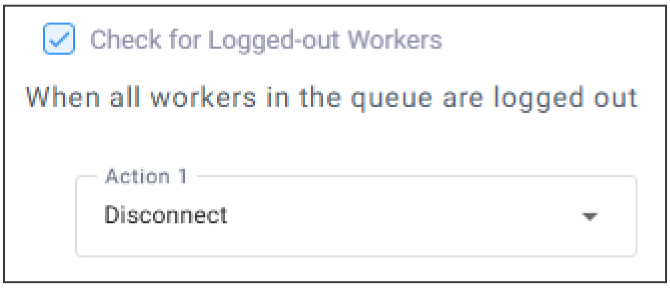


This limit requires the same or more licensed channels.

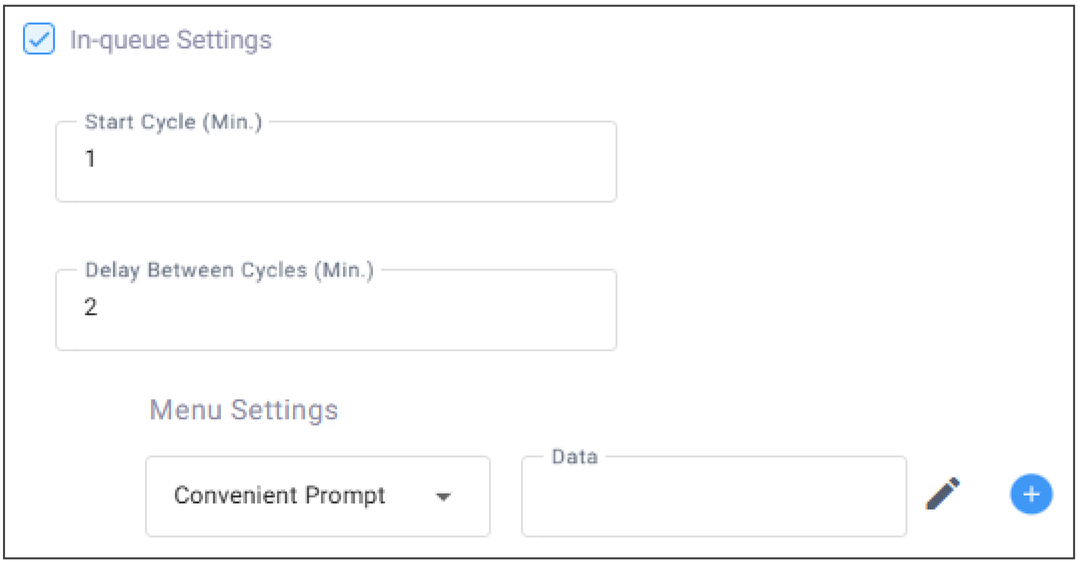
15. In the 'Max. Wait Time (Min.)' field, enter the maximum time in minutes that a call can wait in the queue.
16. In the 'Max. Wait Time (Sec.)' field, enter the maximum time in seconds that a call can wait in the queue.

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.

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**).



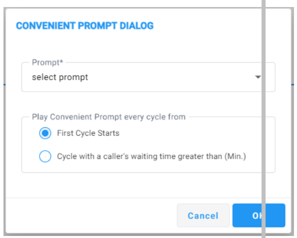
18. To provide callers with various actions and options during their waiting time, select the 'In-queue Settings' check box; the following appears:

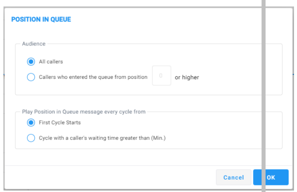


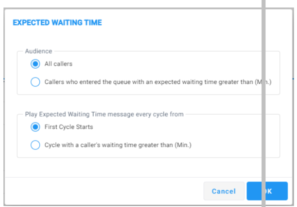
a. In the 'Start Cycle' field, enter the duration (in minutes) that the basic 'music on hold' is played to the caller, before playing the set of in-queue actions to the caller.

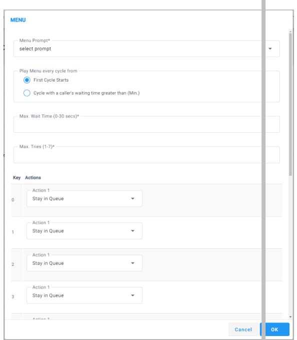
b. In the 'Delay Between Cycles' field, enter the duration (in minutes) that the basic 'music on hold' is played to the caller after the current set of in-queue actions and before the next set of in-queue actions begins.

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:  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: ✓ **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.
Position in Queue	This prompt informs callers about their position in the queue.	**1.** Click the 'Data' field's icon; the following appears:  **2.** Under the **Audience** group, choose which callers will hear this prompt: ✓ **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 **3.** Under the **Play Position in Queue message every cycle from** group, select one of the following options: ✓ **First Cycle Starts** ✓ **Cycle with a caller's waiting**

From drop-down list, select	Description	Edit fields
		time greater than - prompt starts playing in the cycle that is equal to or greater than the time configured in this field.
Expected Waiting Time	This prompt inform callers about their estimated waiting time in the queue.	**1.** Click the ‘Data’ field's icon; the following appears:  **2.** Under the **Audience** group, choose which callers will hear this prompt: ✓ **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 **3.** Under the **Play Expected Waiting Time every cycle from** group, select one of the following options:

From drop-down list, select	Description	Edit fields
		✓ **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
Menu	Configure an in-queue DTMF menu to allow callers to make actions during their in-queue waiting time.	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.  2. Under the **Play Menu every cycle from** group, select one of the following options: ✓ **First Cycle Starts** ✓ **Cycle with a caller's waiting**

From drop-down list, select	Description	Edit fields
		time greater than - menu's prompt starts playing in the cycle that is equal to or greater than the time configured in this field. 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: ✓ **Leave a Message** ✓ **Send SMS** ✓ **Stay in Queue** ✓ **Disconnect** ✓ **Callback** - allows callers to request a

From drop-down list, select	Description	Edit fields
		callback, reserving their place in the queue. When it's their turn, Voca CIC automatically calls them back. 6. For more information on the above actions, see Actions on page 276.

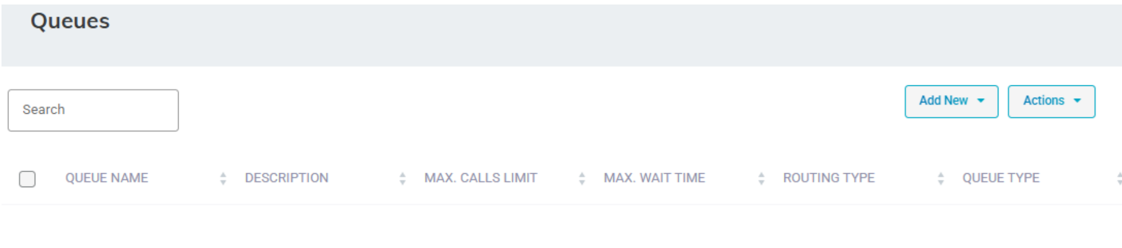
19. Click **Save Changes**.

Adding a worker queue for email

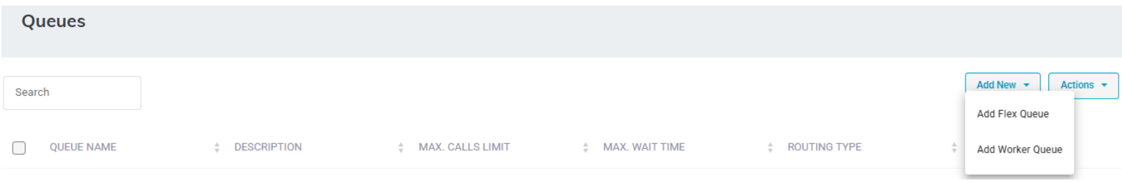
This procedure details the steps to create a new worker queue for email, ensuring that incoming emails are assigned to the most qualified agents based on predefined skill criteria

➢ To add a new Worker Queue for email:

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

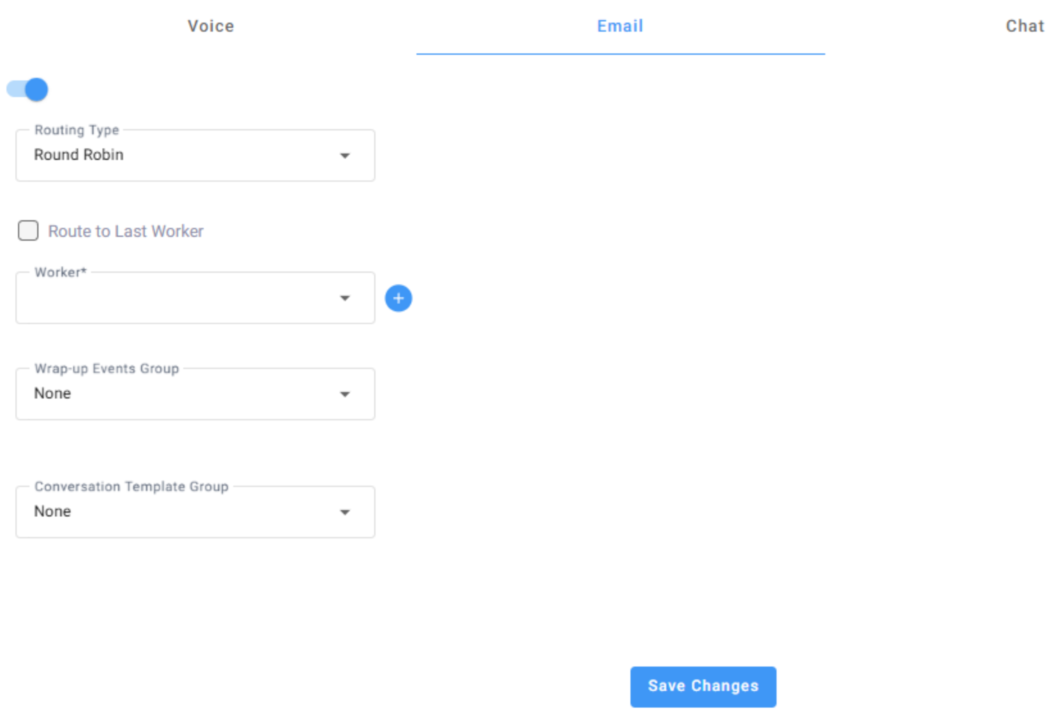


2. Click **Add New**; a drop-down menu appears:



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:



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.

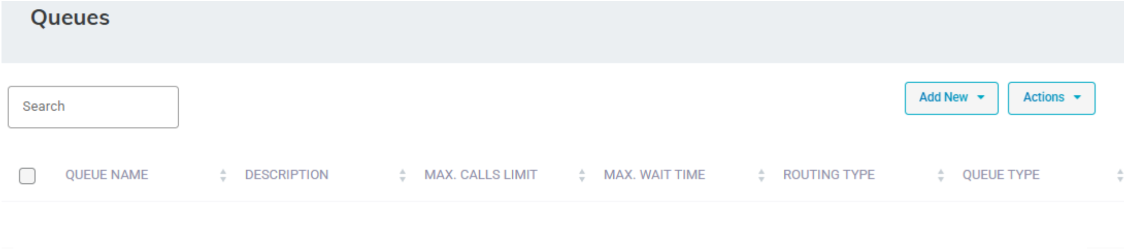
14. Click **Save Changes**.

Adding a worker queue for chat

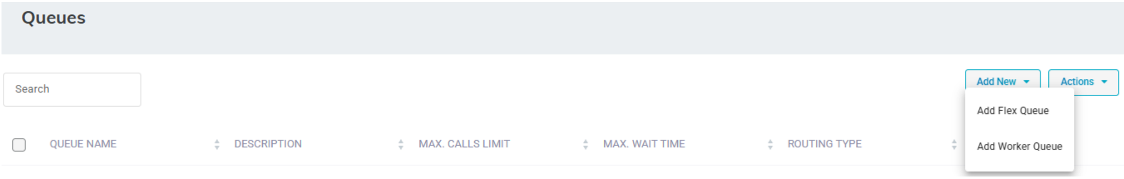
This procedure explains the steps to create a new worker queue for chat, ensuring that incoming chat requests are routed to the most qualified agents based on predefined skill criteria.

➢ To add a new Worker Queue for chat:

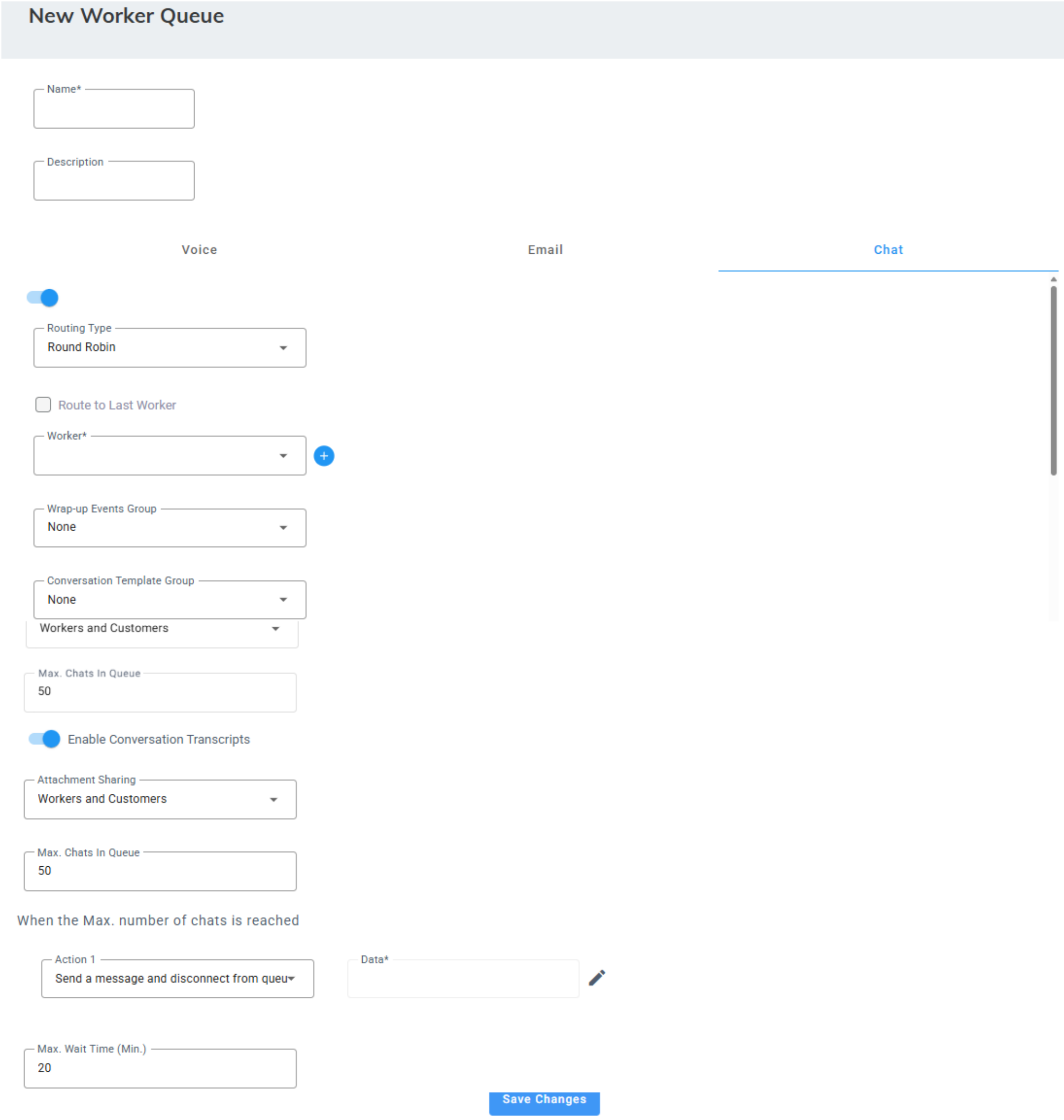
1. Open the Queues page (**Configuration** > **Routing > Queues**); the following appears:



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:



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.

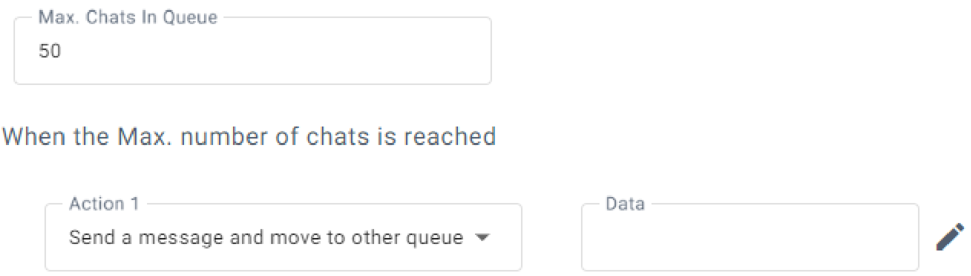
10. From the 'Workers' drop-down list, select the appropriate Worker names.
11. From the 'Wrap-up Events Group' drop-down list, select the appropriate value.
12. From the 'Conversation Template' drop-down list, select the template group.
13. Click the **Enable Conversation Transcripts** toggle button 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.

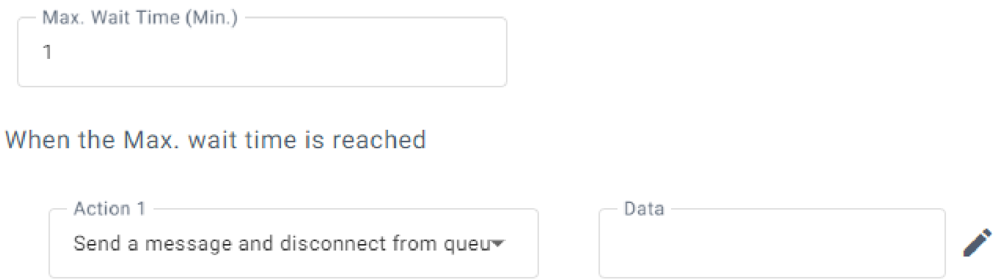
14. From the 'Attachment Sharing' drop-down list, select the Webchat participants that are allowed to transfer files.

> 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).



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).



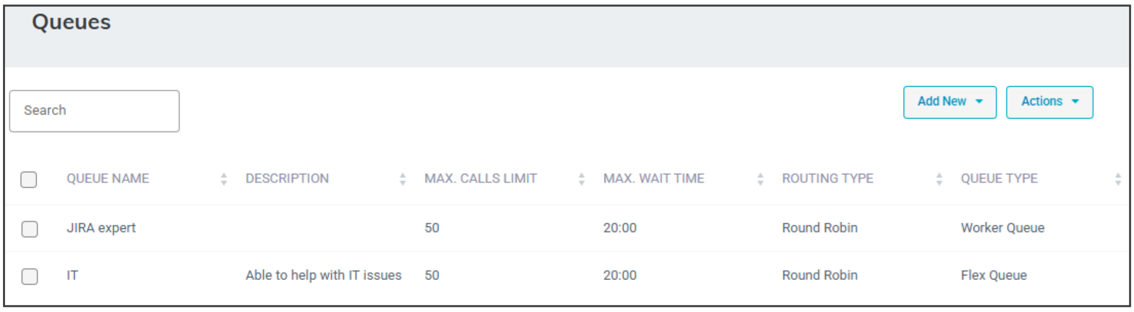
17. Select **Check for Logged-out Workers**.
18. Click **Save Changes**.

Editing a Worker Queue

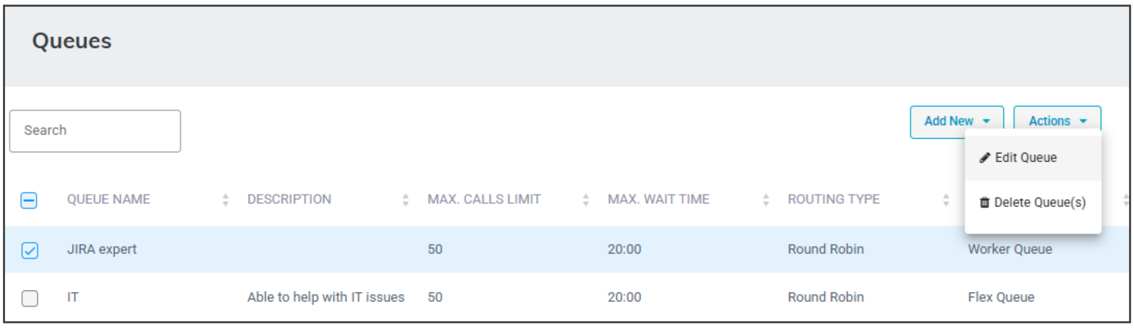
The procedure below describes how to edit a skill-based Routing Queue.

➢ **To edit a Worker Queue:**

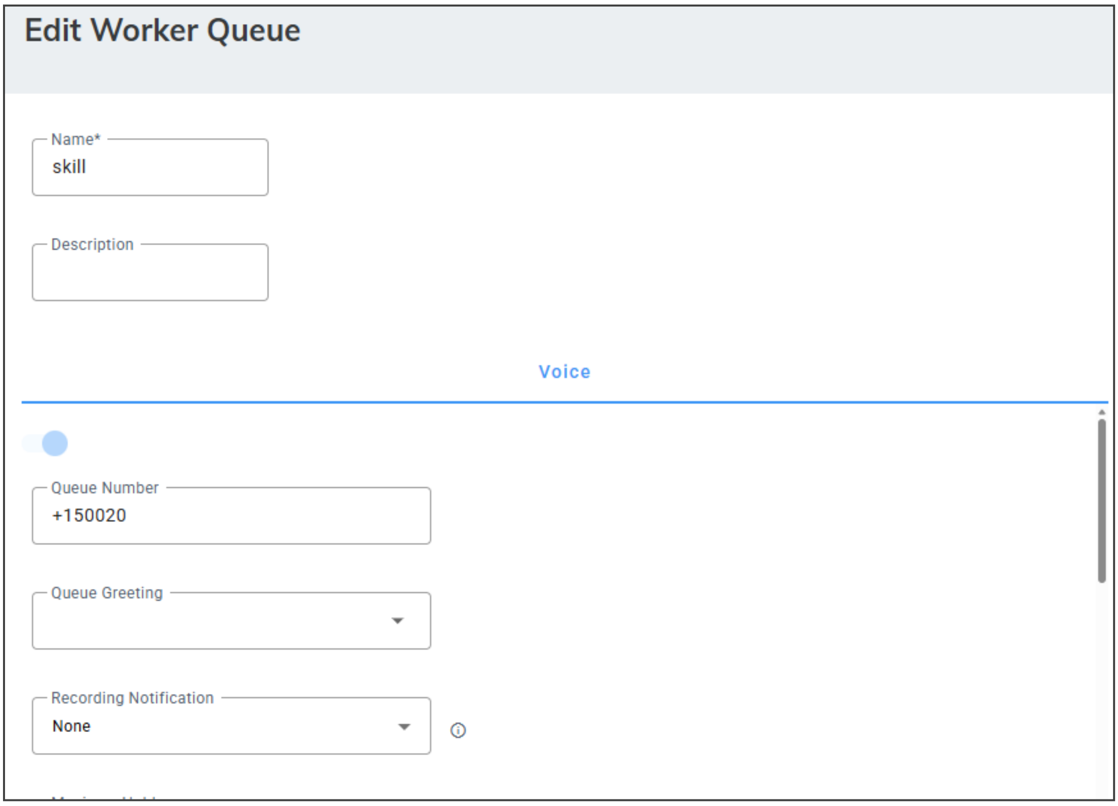
1. Open the Call Queue page (**Configuration** > **Routing** > **Queues**); the following appears:



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



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



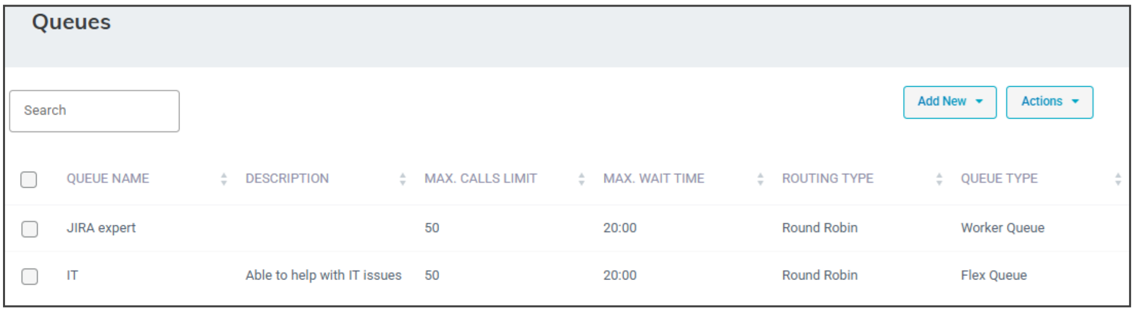
4. Make your necessary changes, and then click **Save Changes**.

Deleting a Worker Queue

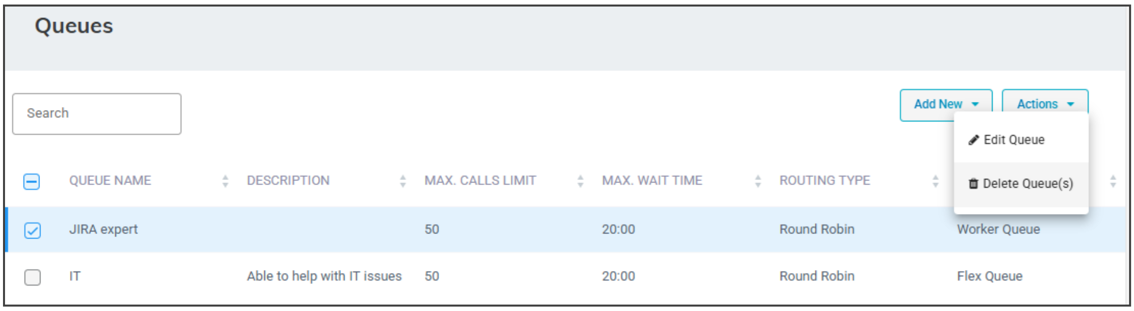
The procedure below describes how to delete a Worker Queue.

➢ To delete a Worker Queue:

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



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)**.



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

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

Defining Working Hours

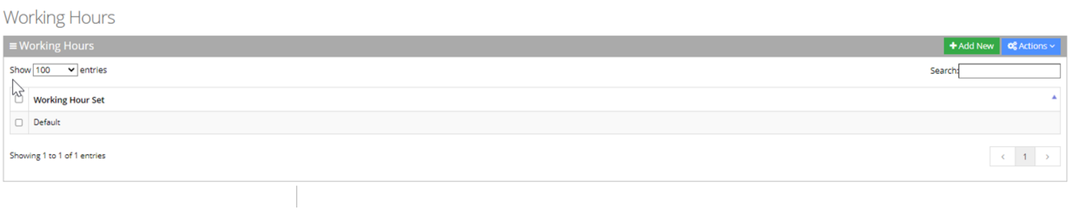
The system supports defining several sets of working hours per customer/service to allow the definition of different non-working and working time. By default, every customer/service has one working time set which can't be deleted.

Adding Working Hours Set

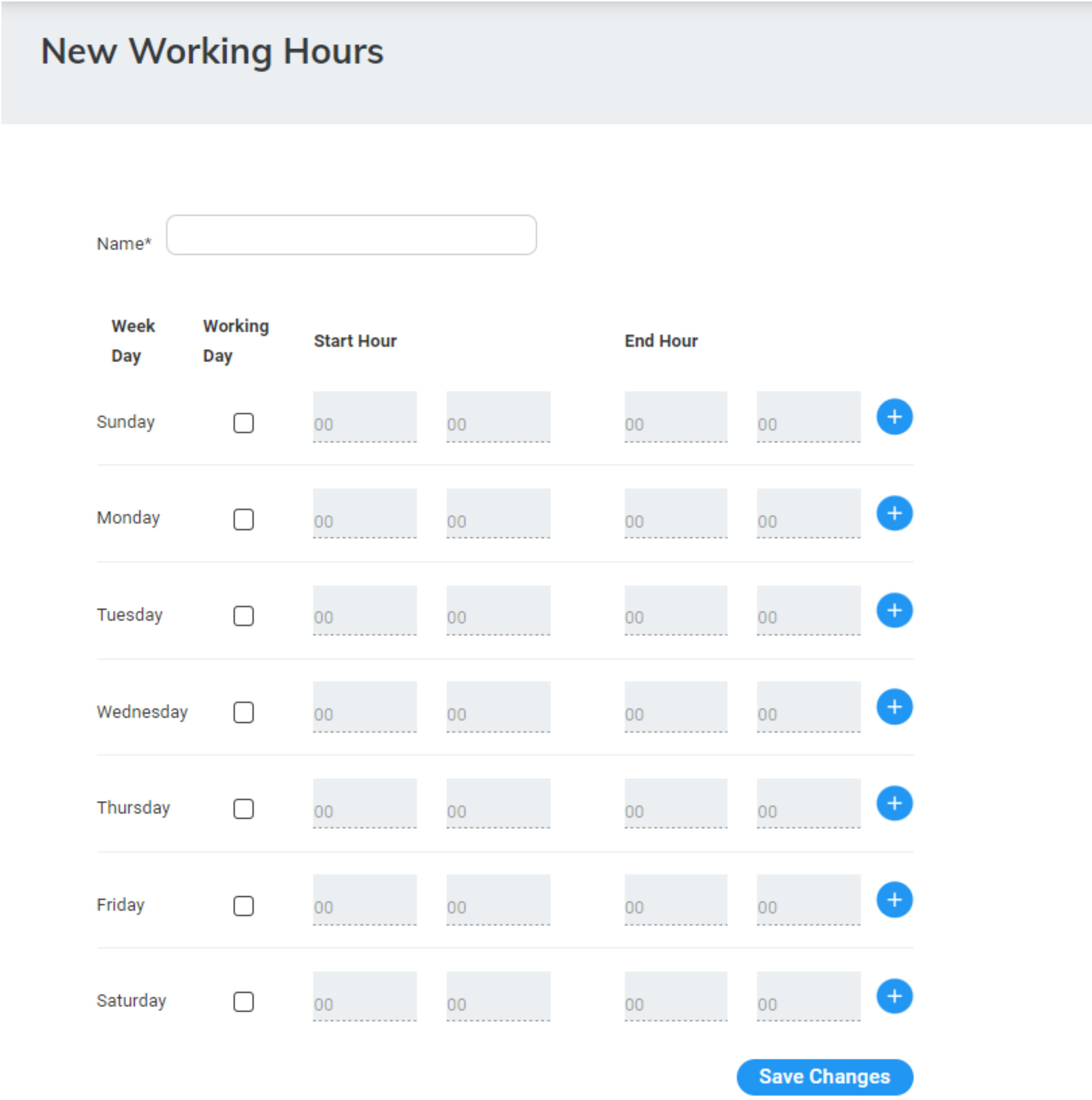
The procedure below describes how to add a new Working Hours Set.

➢ To add a new Working Hours Set:

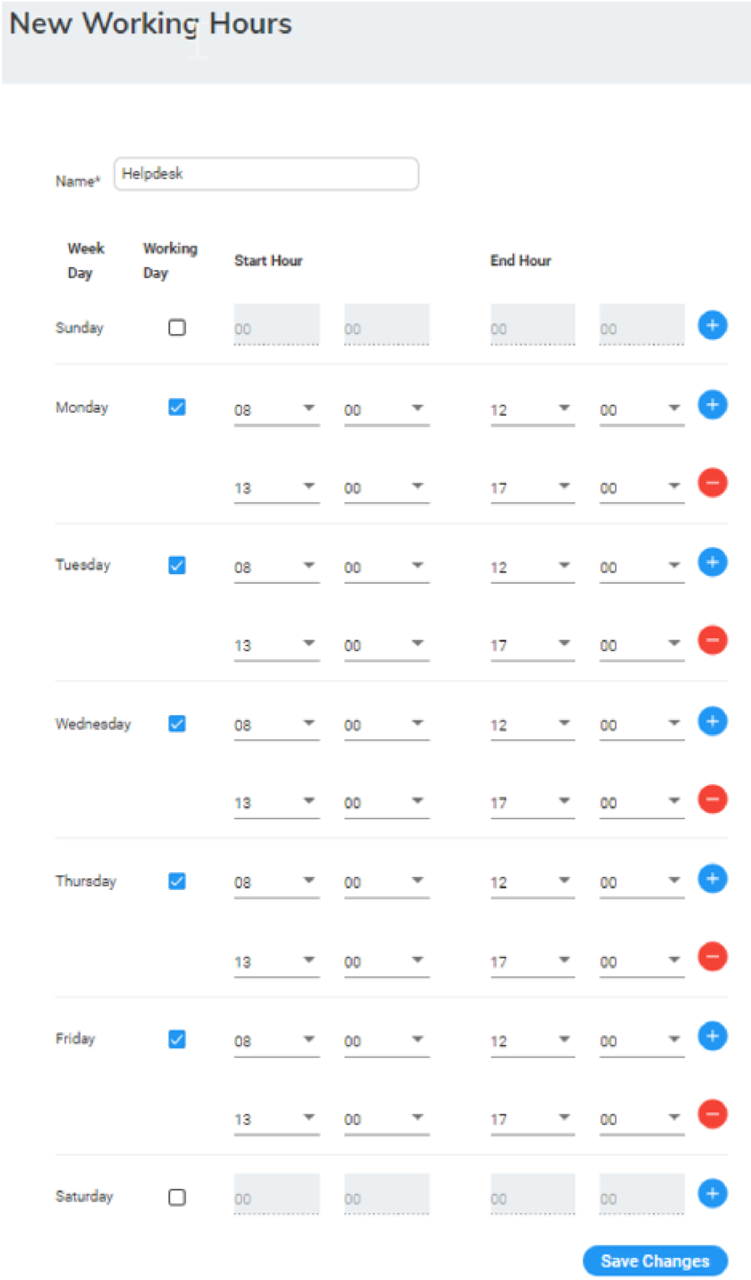
1. Open the Working Hours Details screen (**Configuration** > **Working Hours**); the following appears:



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



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

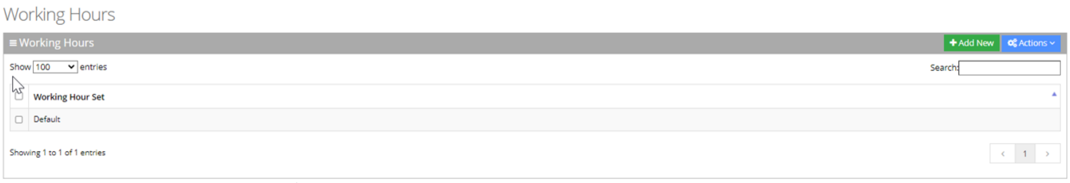


Editing Working Hours Set

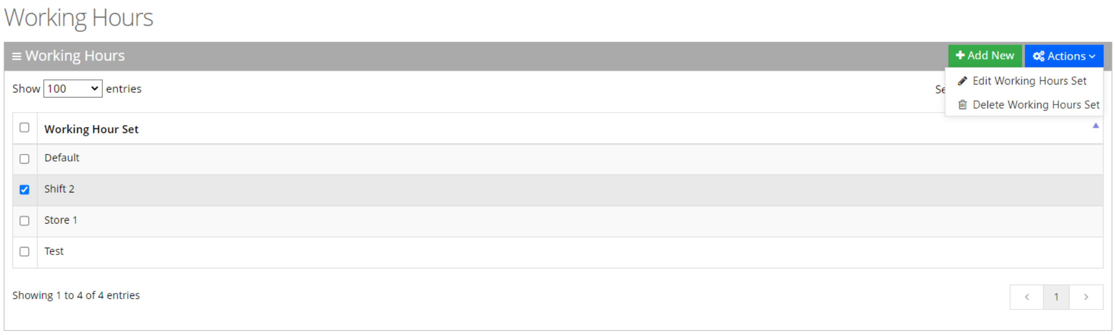
The procedure below describes how to edit a Working Hours Set.

➢ To edit a Working Hours Set:

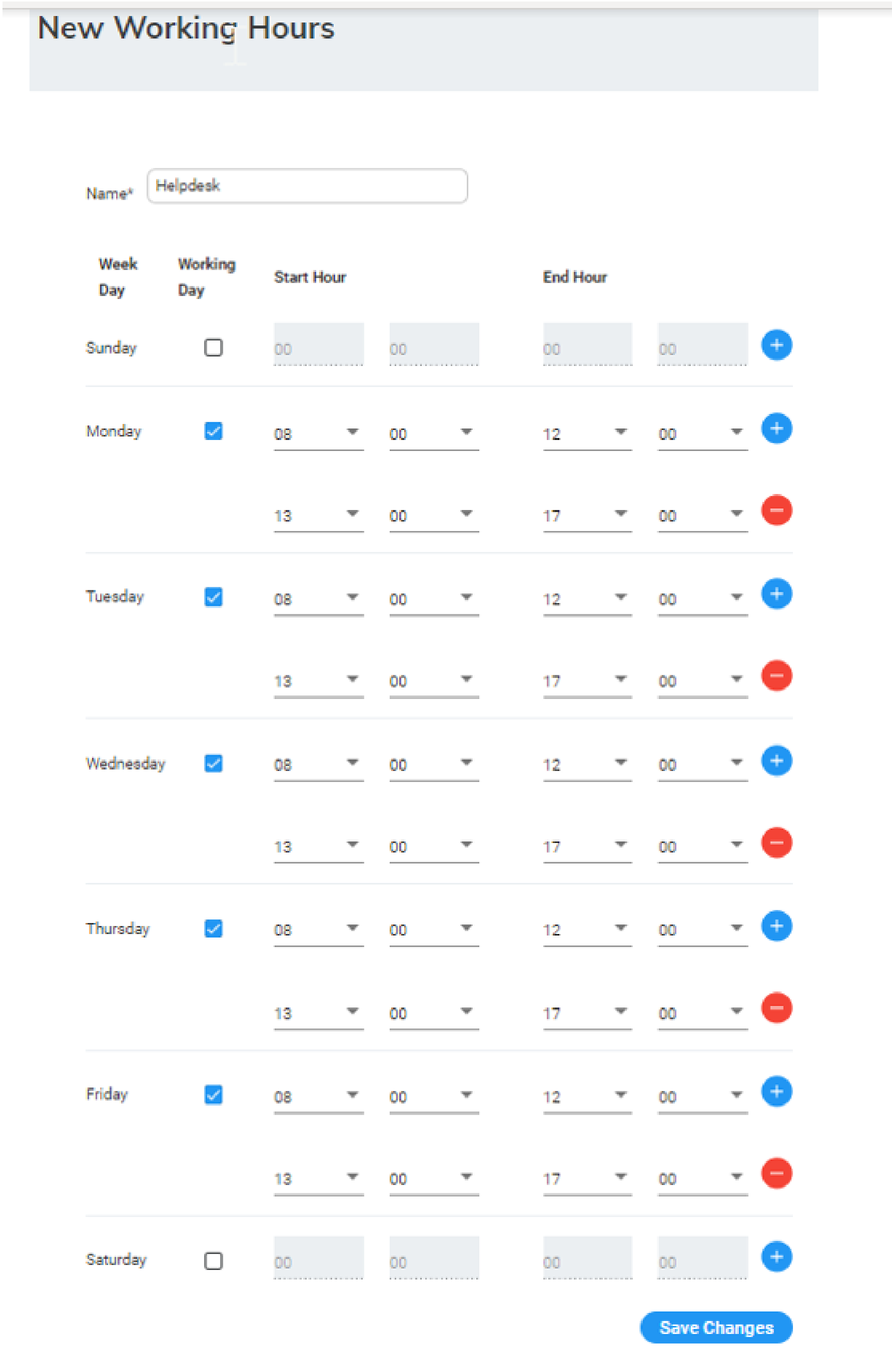
1. Open the Working Hours Details screen (**Configuration** > **Working Hours**); the following appears:



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



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



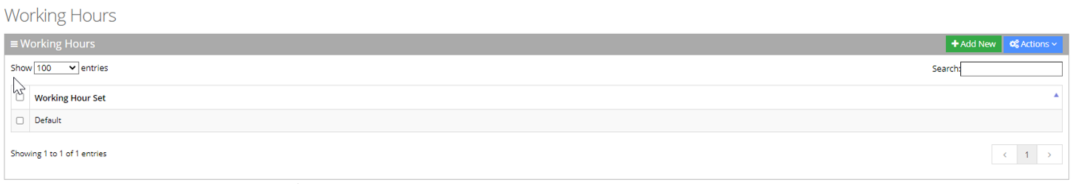
5. Edit the working days and hours, by selecting the check box of each appropriate working day.
6. Edit the 'Start Hour' and 'End Hour' for each applicable day.
7. Click **Save Changes**.

Deleting Working Hours Set

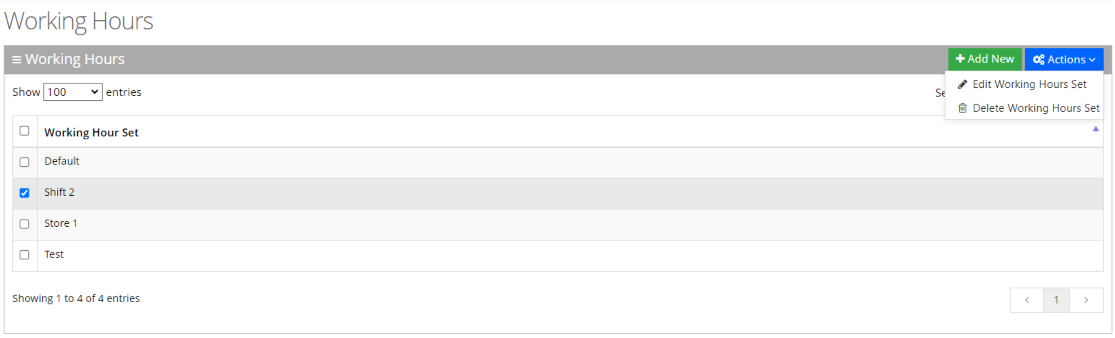
The procedure below describes how to delete a Working Hours Set.

➢ To delete a Working Hours Set:

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



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



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

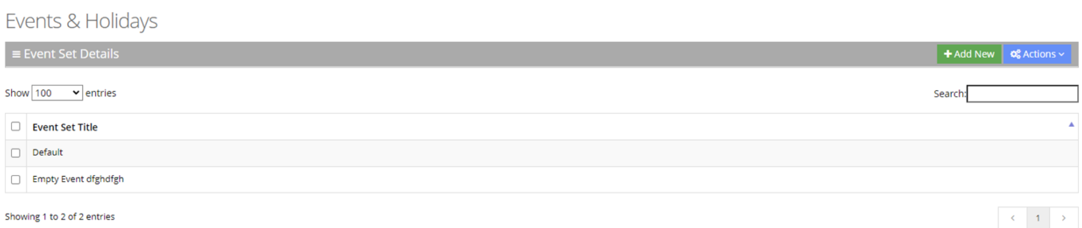
Defining Events and Holidays

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

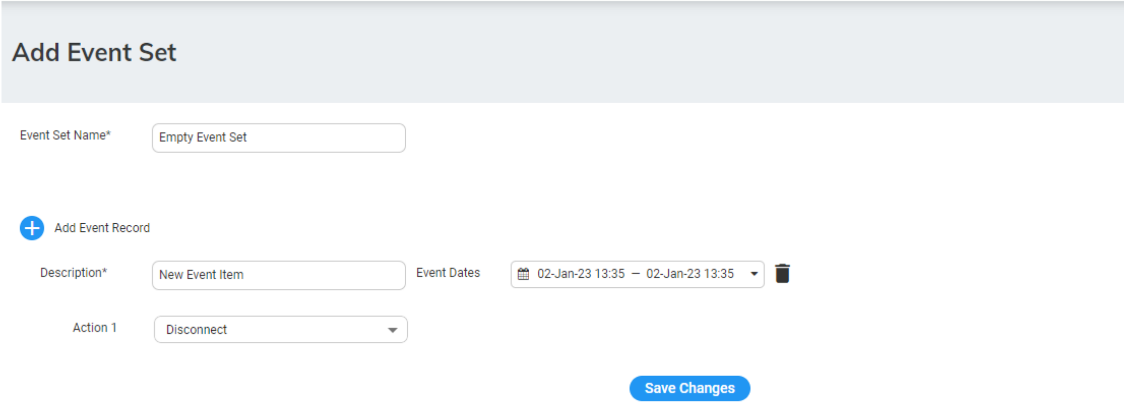
Adding Events and Holidays

➢ To add events and holidays:

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



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



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

Editing Events and Holidays

The procedure below describes how to edit Events and Holidays.

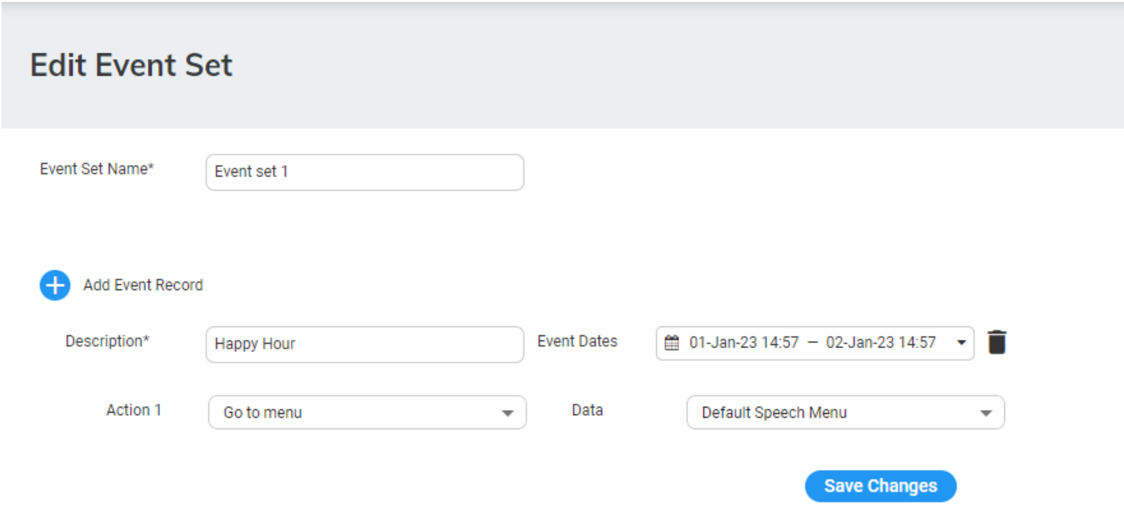
➢ **To edit Events and Holidays:**

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

Figure 6-3:

4. Select **Edit Event**.

Figure 6-4:



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

Delete Events and Holidays

The procedure below describes how to delete Events and Holidays.

➢ To delete Events and Holidays:

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

Figure 6-5:

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

System Settings

System settings consists of the following:

- Teams Presence Settings
- Directory Synchronization
- General Email Configuration
- Hybrid Worker
- Omnichannel Configuration
- Cognitive Services
- Call Recordings
- Data Export

Teams Presence Settings

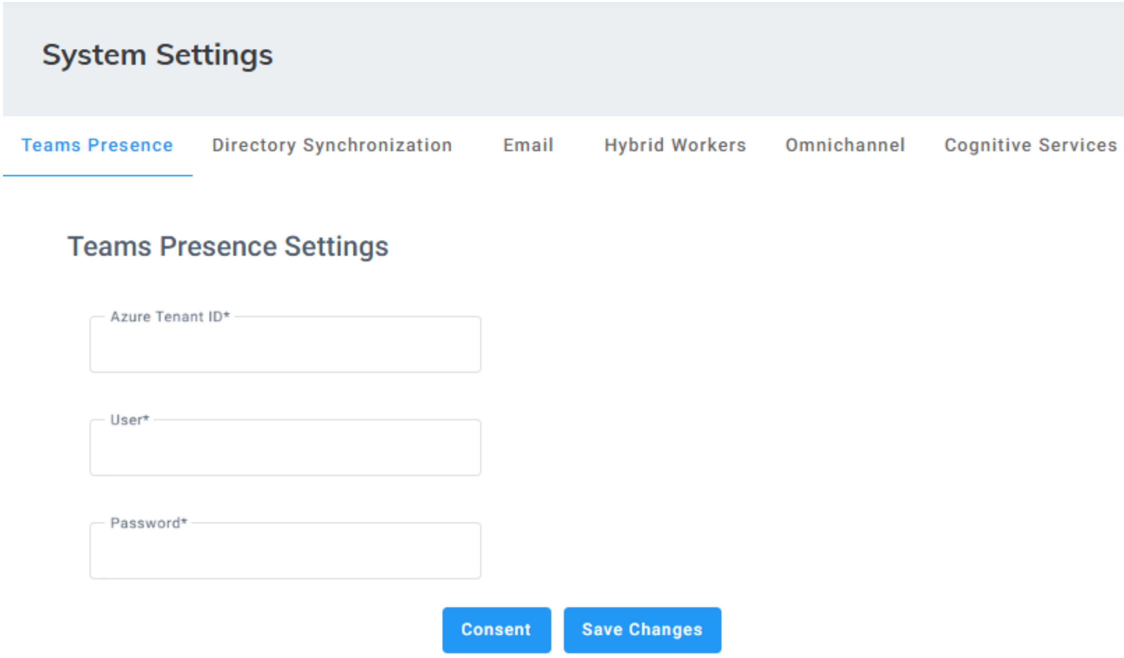
To get the presence of Azure tenant users, the application should get permissions for accessing this information.

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:

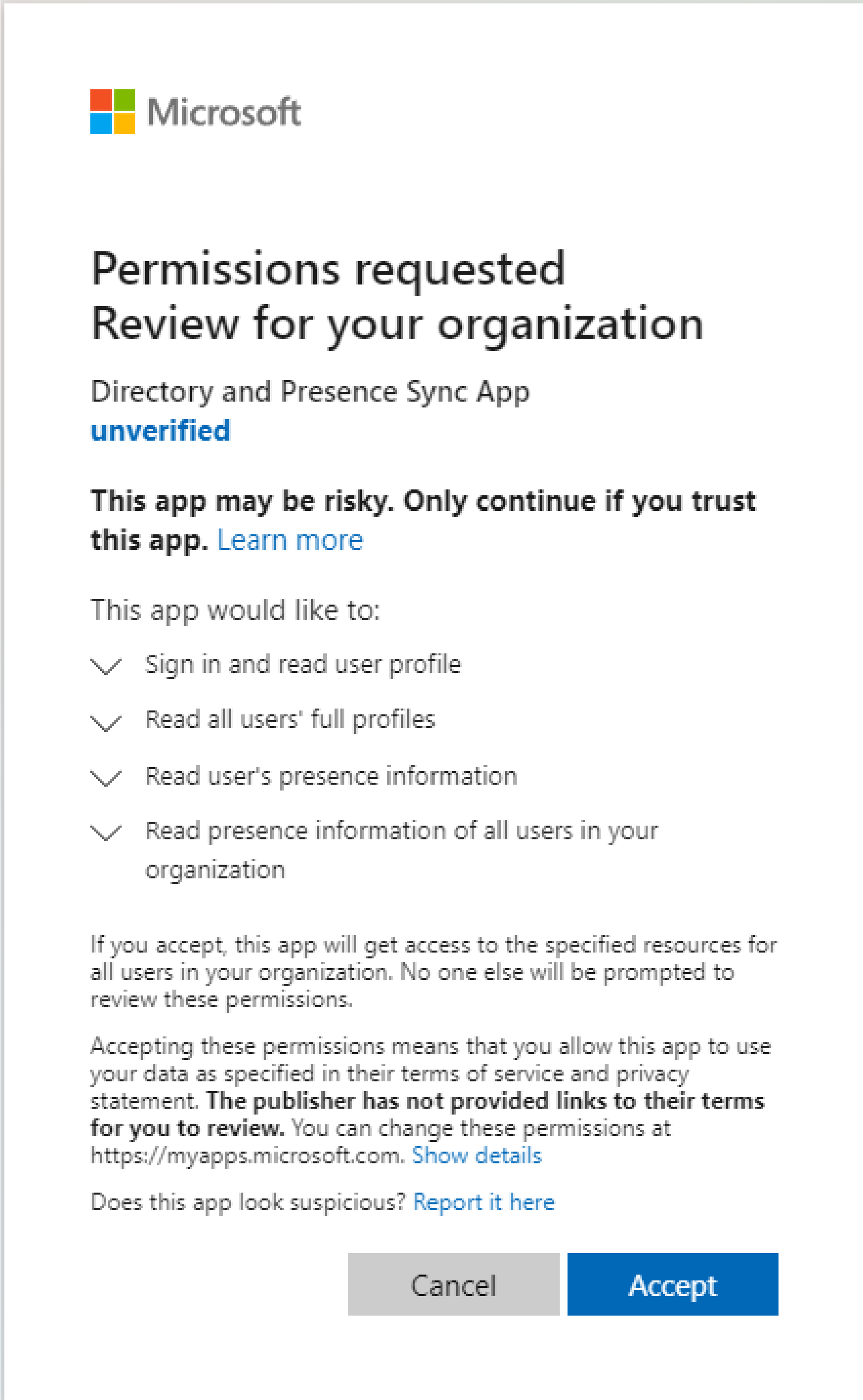
1. Enter the Azure tenant details in the required fields below.
2. Click **Consent** to initiate the integration.
3. An **Azure Global Administrator** must approve the request to register the application with the necessary permissions.
4. Once approved, the application is created in Azure, granting Voca 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:



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 Light-weight 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.

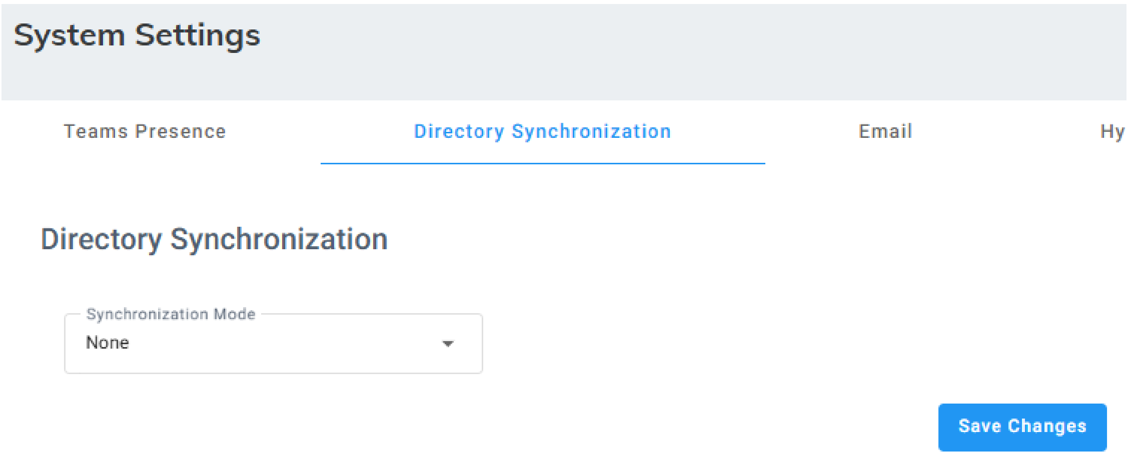
The organization Administrator (Microsoft 365) should grant tenant-wide admin consent to “Directory and Presence” applications on behalf of the organization, this is done through an app registration process:

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.

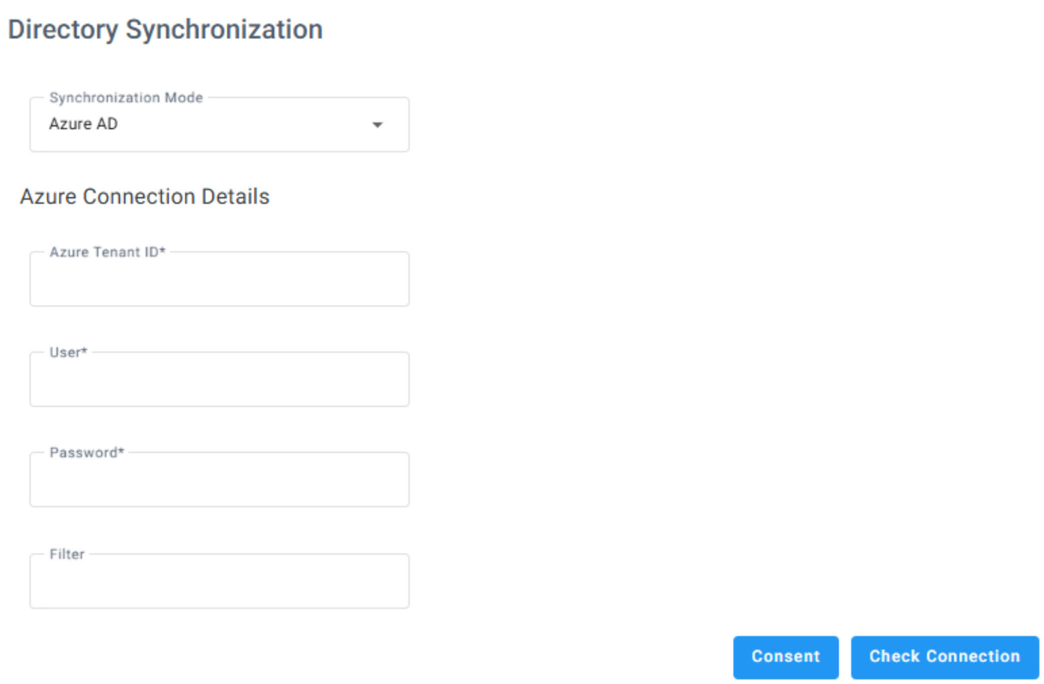
The consent process is required once for Azure AD sync and once for Teams Presence.

➢ **To configure Azure AD:**

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



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



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

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

7. Click **Consent**.

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

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

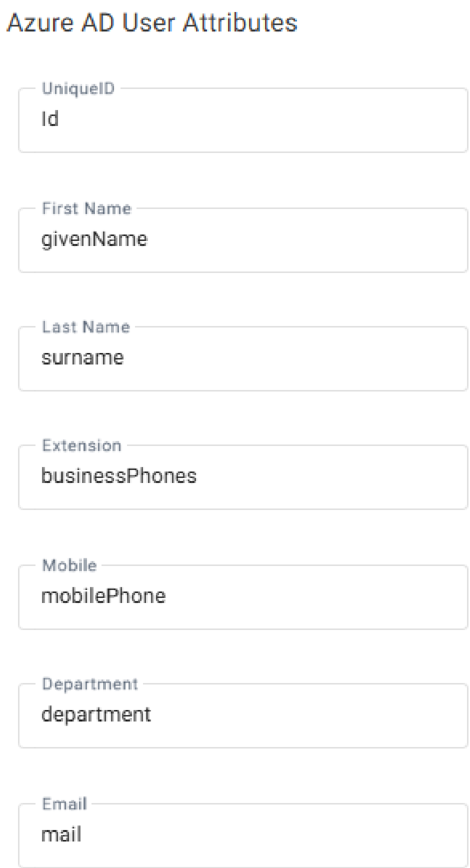
8. Under the **Azure AD User Attributes** group, enter the following:
   a. In the 'Unique ID' field, enter "Id".
   b. In the 'First Name' field, enter "givenName".
   c. In the 'Last Name' field, enter "surname".

d. In the 'Extension' field, enter "businessPhone".

e. In the 'Mobile' field, enter "mobilePhone".

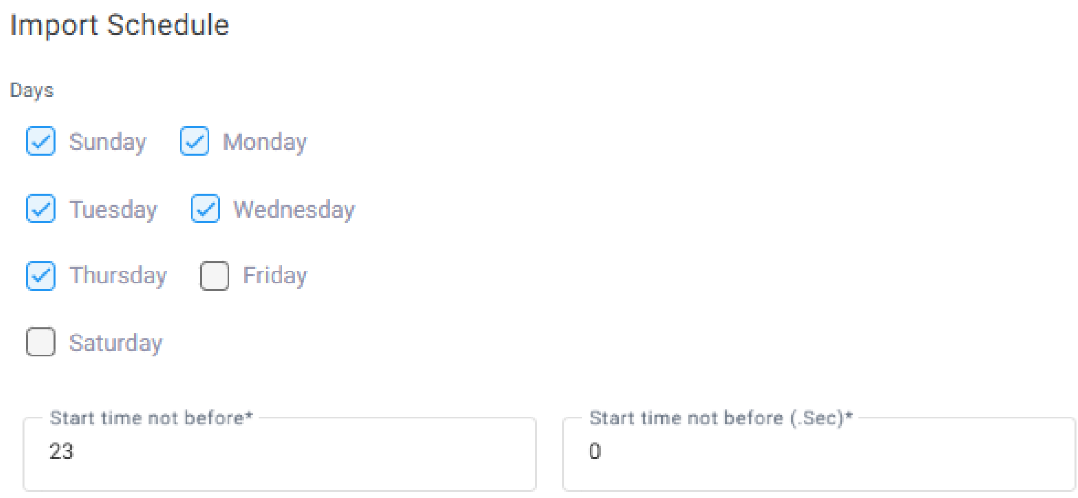
f. In the 'Department' field, enter "department".

g. In the 'Email' field, enter "mail".



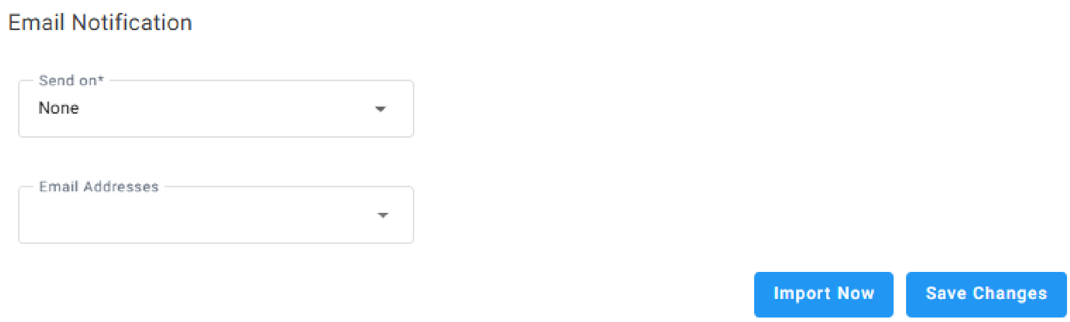
9. Select the following fields for when you want to import contacts from the Azure AD server:

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



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



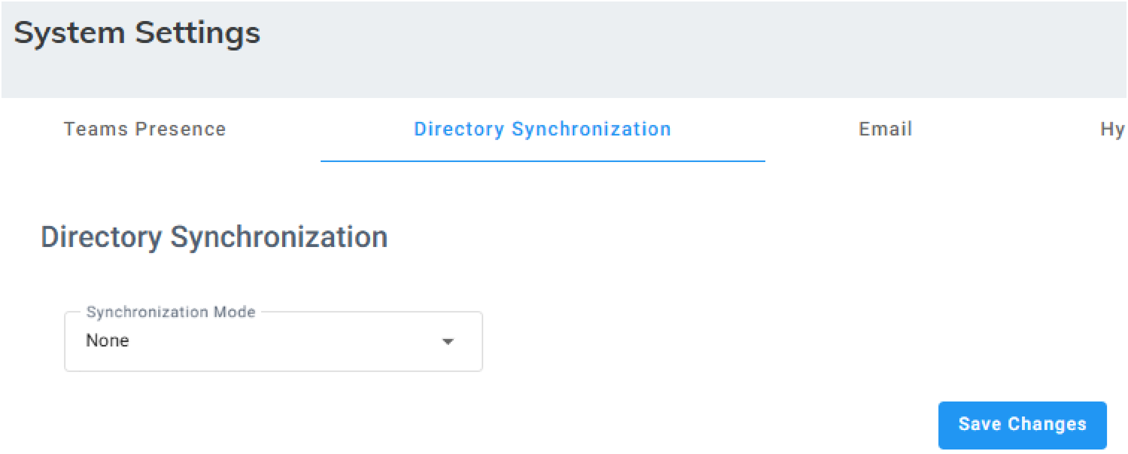
11. Click **Save Changes**.
12. Click **Import Now** to import contacts from the Azure AD server immediately (Optional).

Configuring LDAP

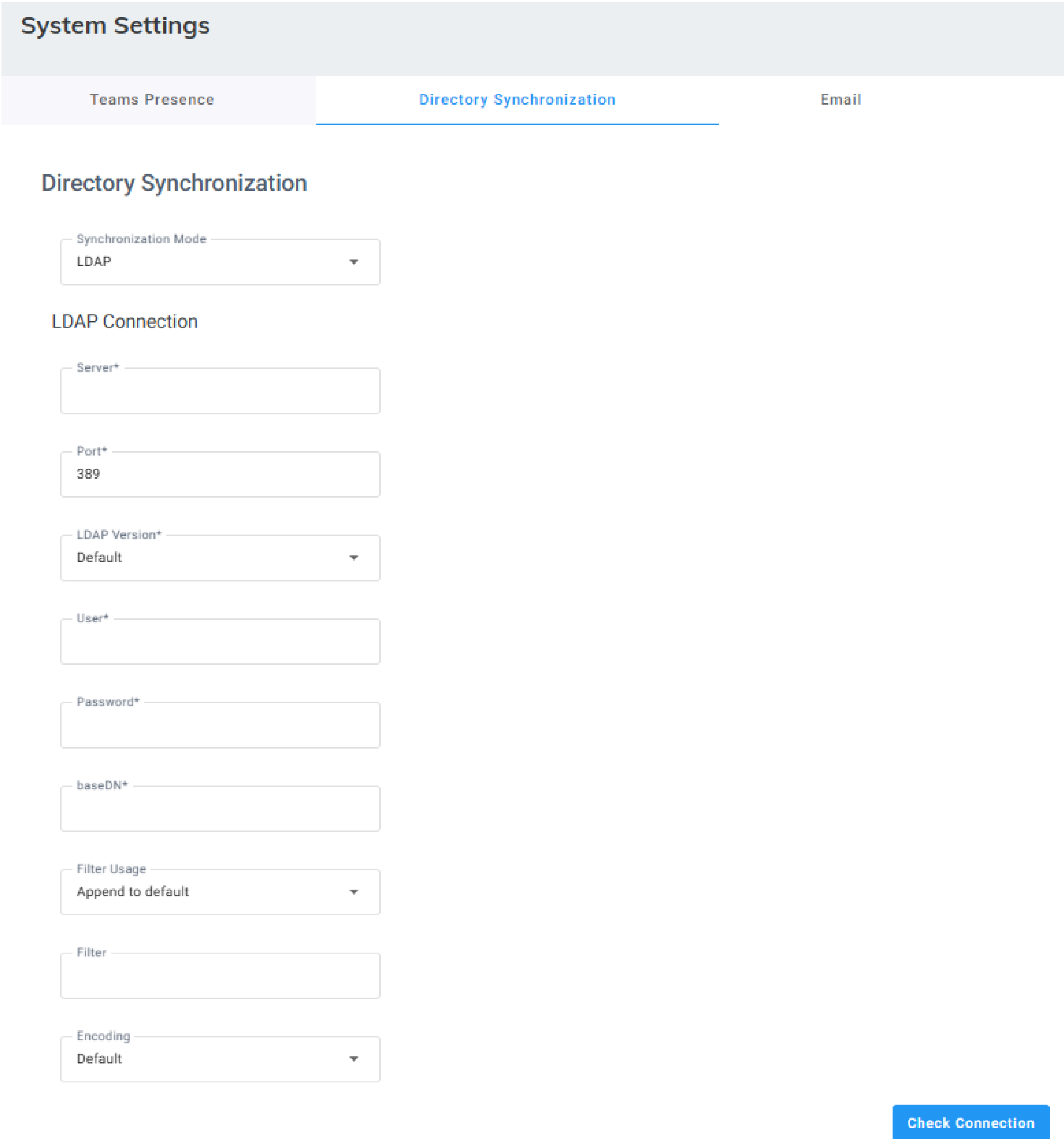
Synchronize between Voca tenant with LDAP (Lightweight Directory Access Protocol).

➢ **To configure LDAP:**

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



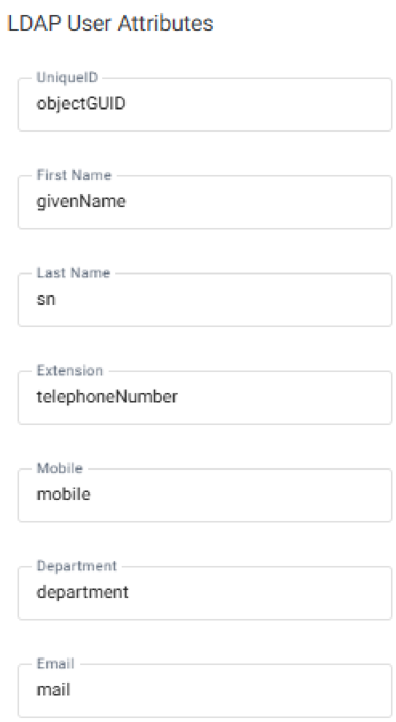
2. Under the **Directory Synchronization** group, from the 'Synchronization Mode' drop-down list, select **LDAP**; the following appears:



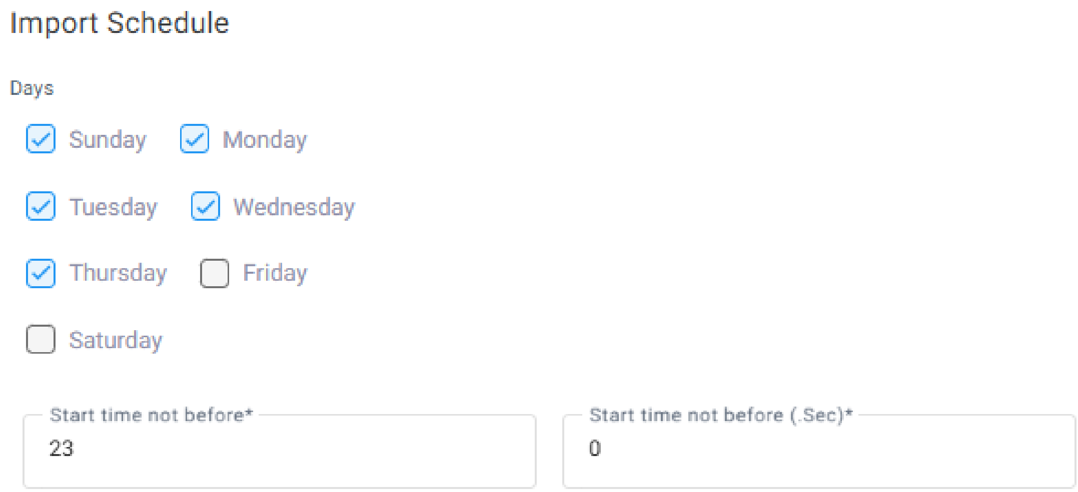
3. In the 'Server' field, enter the URL of the LDAP server. It can include either FQDN or an IP Address.
4. In the 'Port' field, enter the port that synchronizes with LDAP. Enter either "398" or "3268".
5. From the 'LDAP Version' drop-down list, select the LDAP Version.
6. In the 'User' field, enter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

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

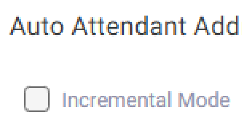
12. Under the LDAP User Attributes group, you can enter different attributes to import for LDAP or use the default.



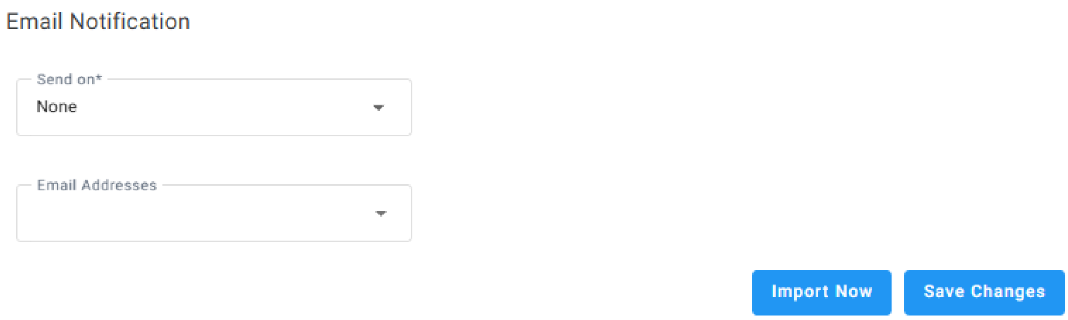
13. Select the following fields when you want to import contacts from the Azure AD server:
    - Days
    - Start Time
    - Start time not before (Sec)



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



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



16. Click **Save Changes**.

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

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'.

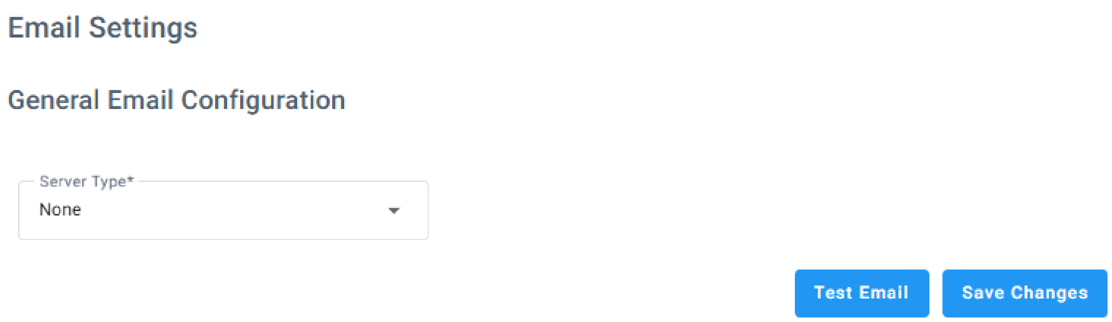
Configuration depends on your server type:

- Configuring Email for Azure below
- Configuring Email for SMTP on page 164

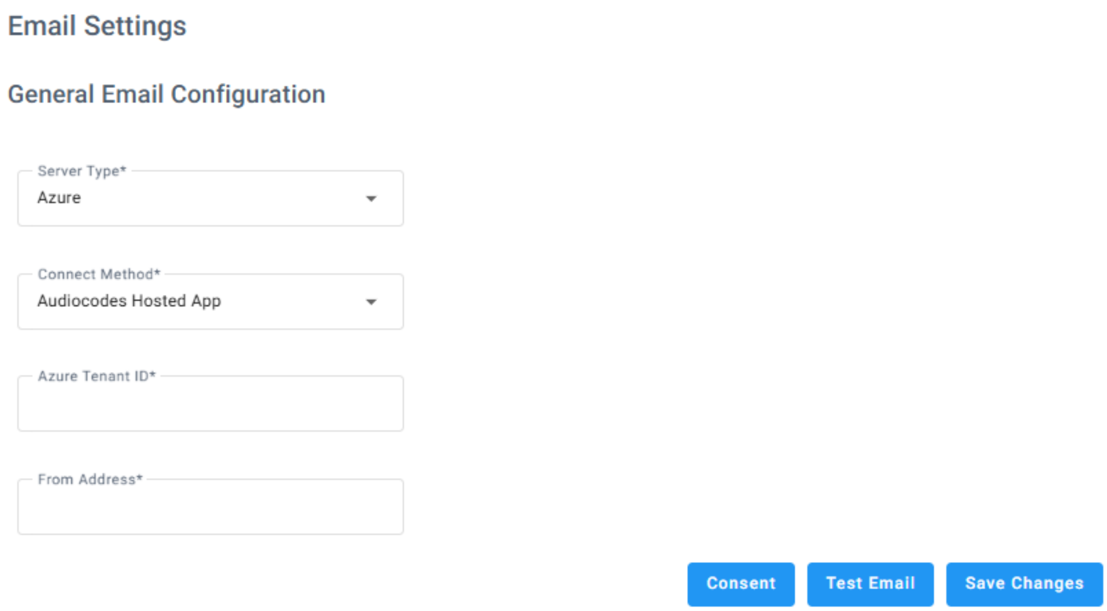
Configuring Email for Azure

➢ **To configure general email settings for Azure:**

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



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



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:

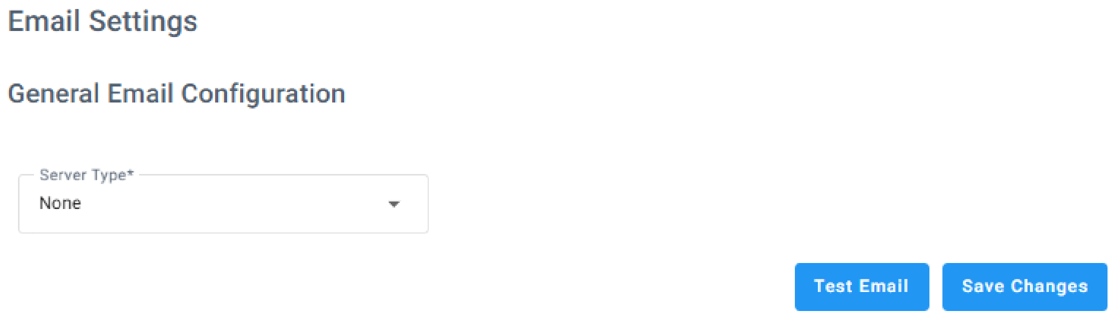
Connect Method	Steps
AudioCodes Hosted App:	1. In the 'Azure Tenant ID' field, enter the Azure Tenant ID from which to receive the emails. 2. In the 'From Address' field, enter the address from where emails are sent.
Self-Hosted App (Delegated)	1. In the ‘Azure Tenant ID’ field, type the Azure Tenant 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)	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 applic-ation secret key. 4. In the ‘From Address’, type the address from where emails are to be sent.

5. Click **Save Changes**.

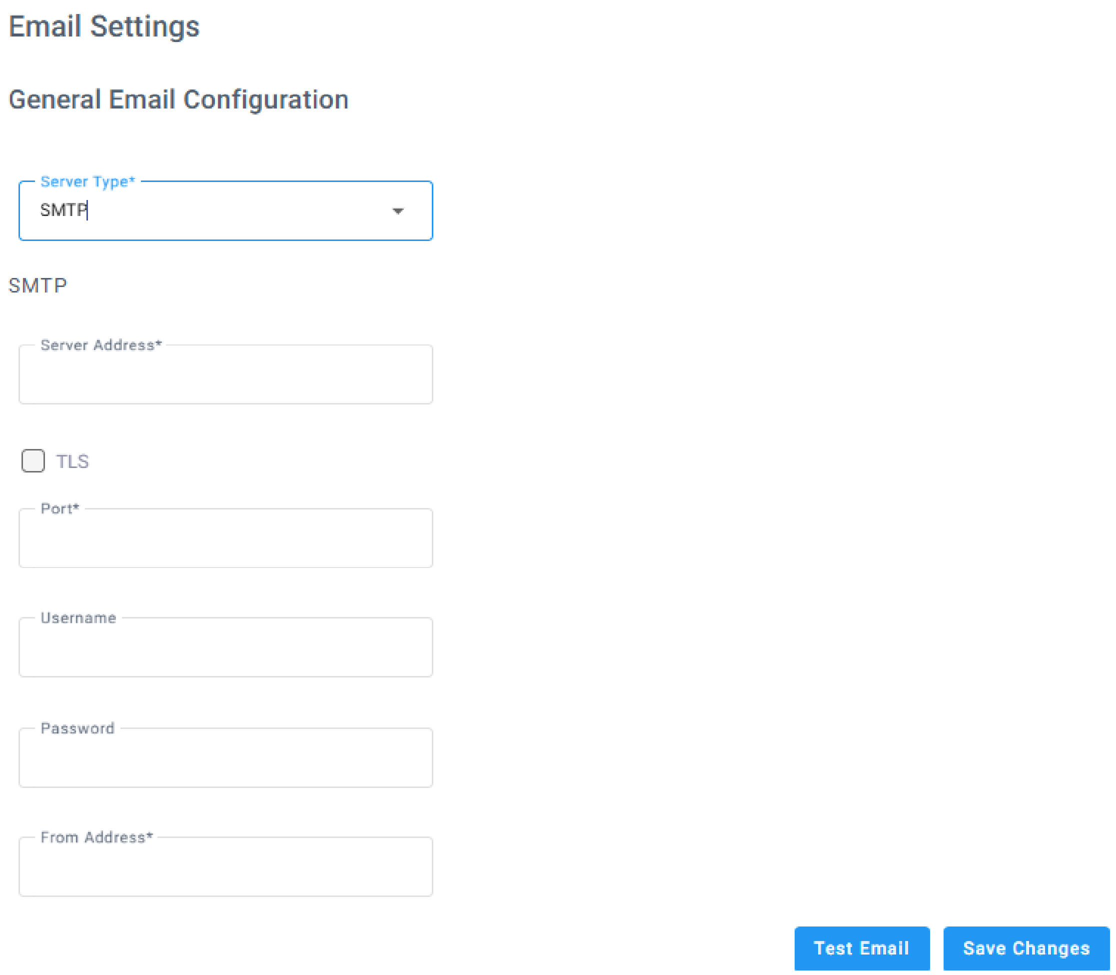
Configuring Email for SMTP

➢ To configure general email settings for SMTP:

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



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



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.

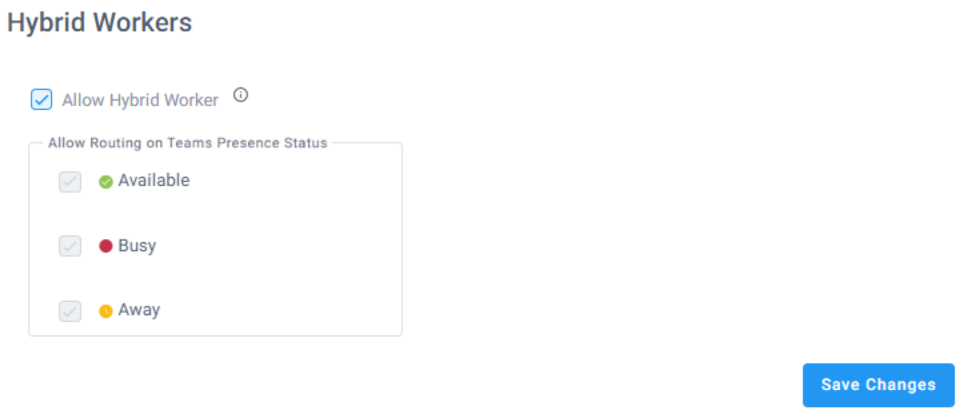
5. In the 'Port' field, type the port ('25' or '587') used for the email server.
6. In the 'Username' field, type the username for the email address you’re using.
7. In the 'Password' field, type the password for the email address you’re using.
8. In the 'From Address' field, type the address from where 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:



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 167

- Configuring Omnichannel settings for SMS on page 169

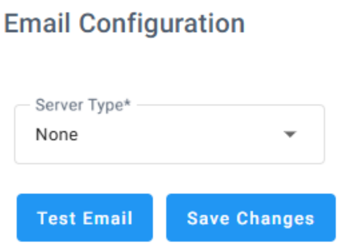
Configuring Omnichannel Email for Azure

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

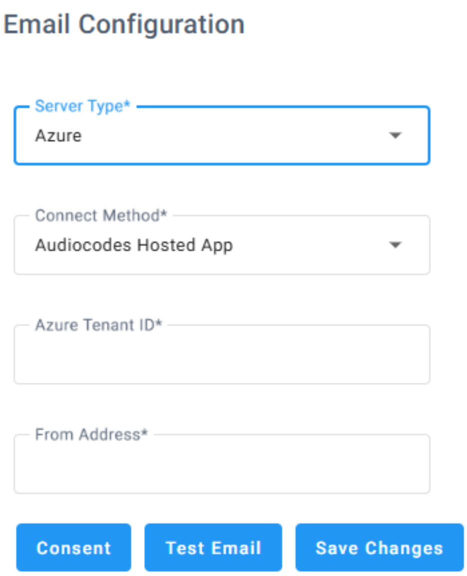
This process requires the the organization Administrator (Microsoft 365) to grant tenant-wide admin consent to omnichannel email applications on behalf of the organization.

➢ To configure omnichannel email settings for Azure:

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



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



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	1. In the 'Azure Tenant ID' field, enter the Azure Tenant ID from

Connect Method	Steps
	which to receive the emails. 2. In the 'From Address' field, enter the address from where emails are sent.
Self-Hosted App (Delegated)	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)	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.

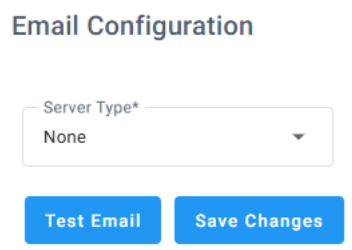
5. Click **Save Changes**.

Configuring Omnichannel Email for SMTP & IMAP

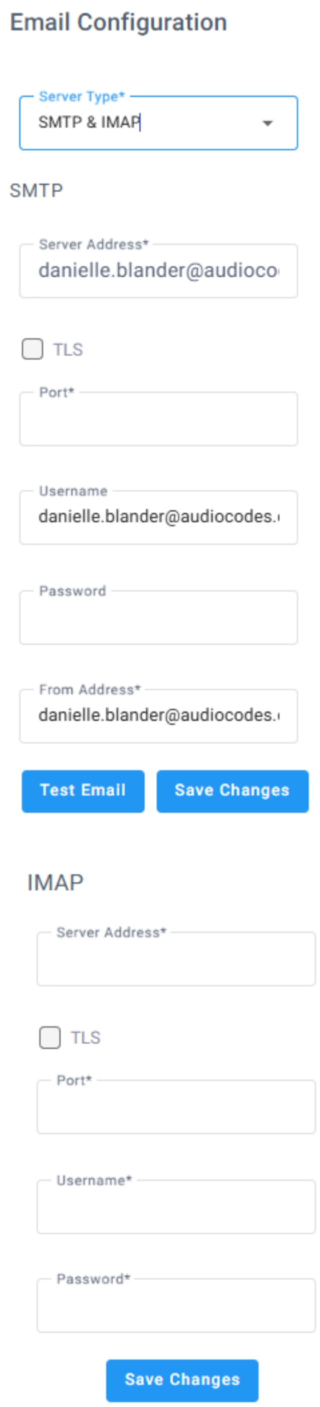
Configure your SMTP & IMAP server so that email interactions can be managed by Voca.

➢ To configure email settings for SMTP & IMAP:

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



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



3. Under **SMPT**, 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.

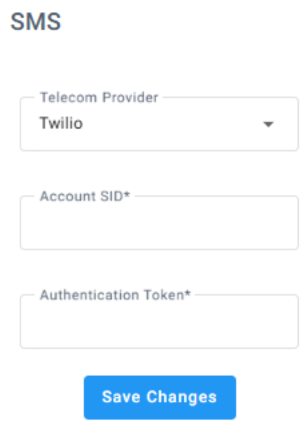
10. Under **IMAP**, in the 'Server Address' field, type the URL of the email server. It can include an FQDN or IP address.
11. Select the 'TLS' check box if the email server uses TLS.
12. In the 'Port' field, type the port ('25' or '587') used for the email server.
13. In the 'Username' field, type the 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:



2. Under **SMS**, from the 'Telecom Provider' drop-down menu, select **Twilio** or **Bandwith**.

3. Do the following per your chosen provider, enter the required information from your provider:

Telecom Provider	Enter values for...
Twillio	■ Account SID ■ Authentication Token
Bandwith	■ Account ID' ■ Application ID ■ API Key ■ API Secret

4. Click **Save Changes**.

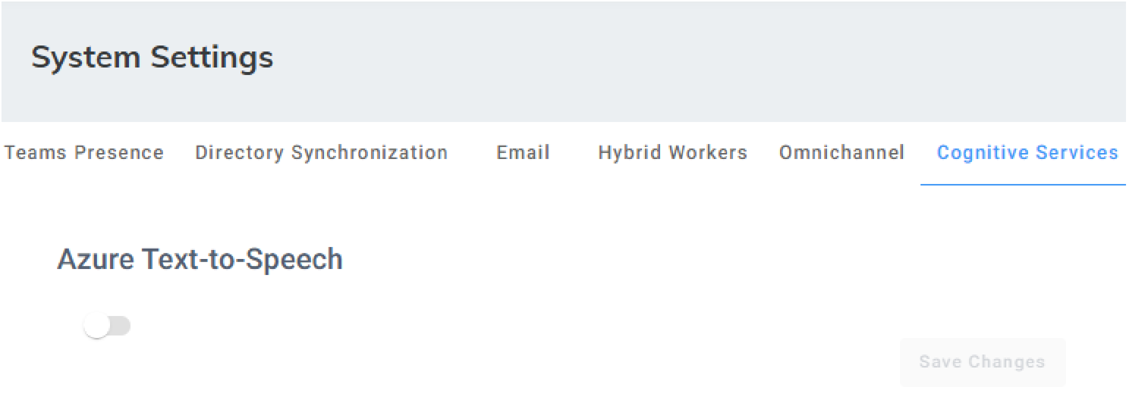
Cognitive Services

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.

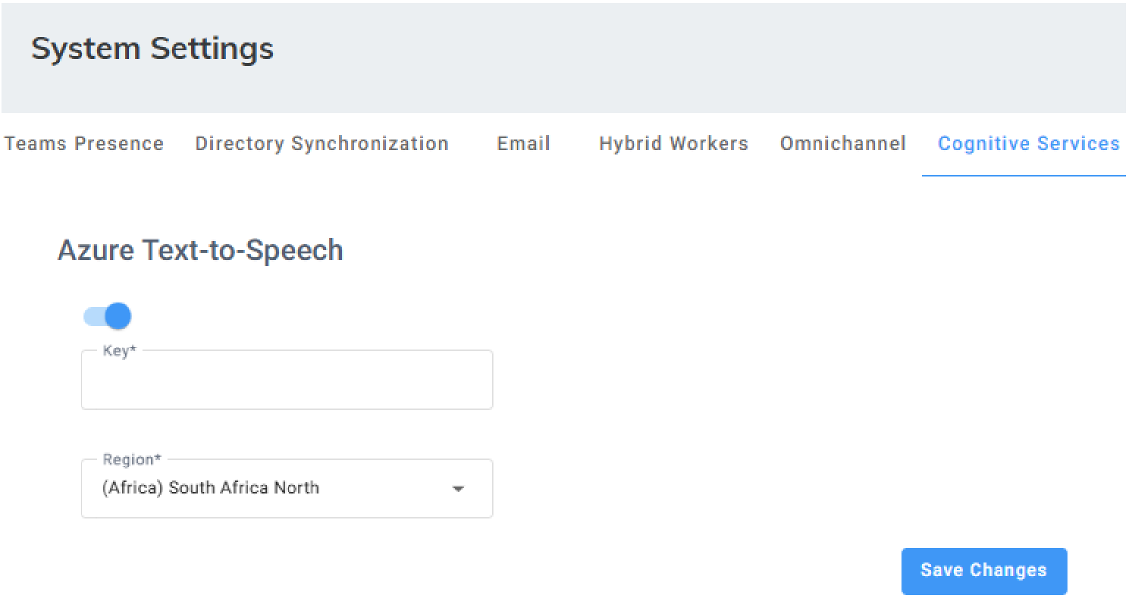
> This change applies only to the Text-to-Speech block in the Flow Designer.
> - If no configuration is provided, the system defaults to AudioCodes TTS.
> - Once configured, Voca automatically switches to the specified Azure TTS service.

➢ **To configure Azure TTS:**

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



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

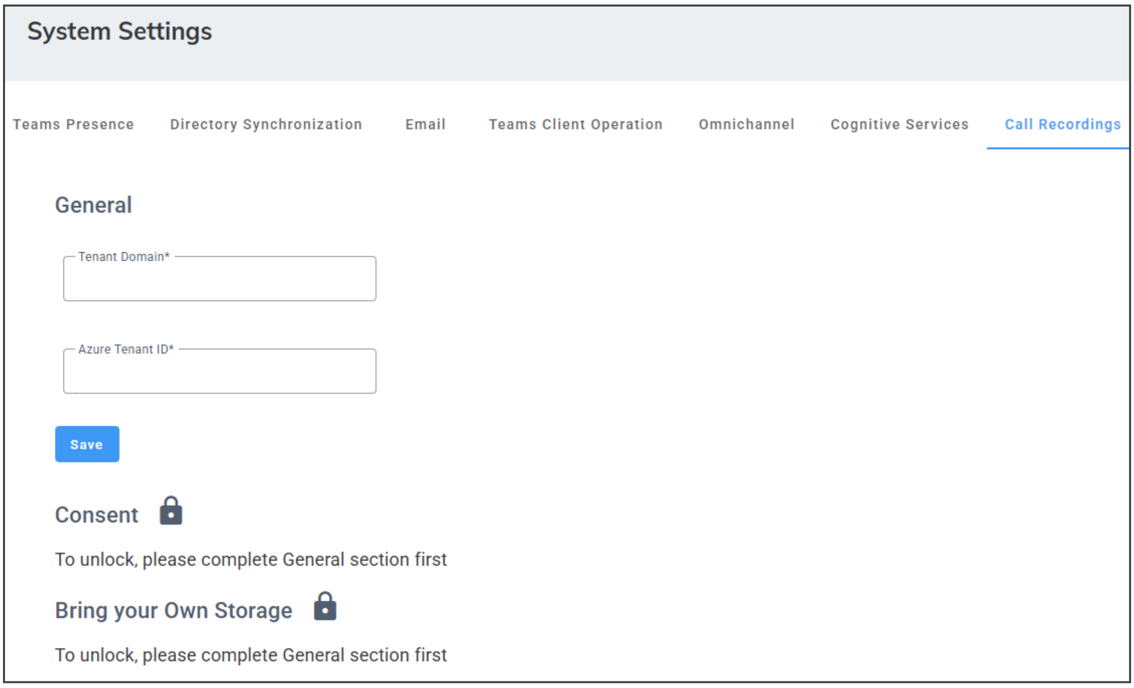


3. In the 'Key' field, enter the your Azure Text-to-Speech key.
4. From the 'Region' field, select the Azure locale voice.
5. Click **Save Changes**.

Call Recordings

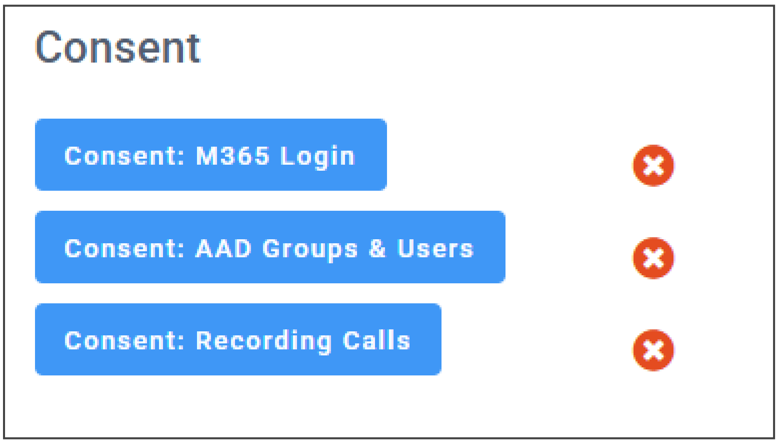
> The Call Recordings tab is available only for tenants that have CIC2 or CIC3 configured as a built-in option.

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



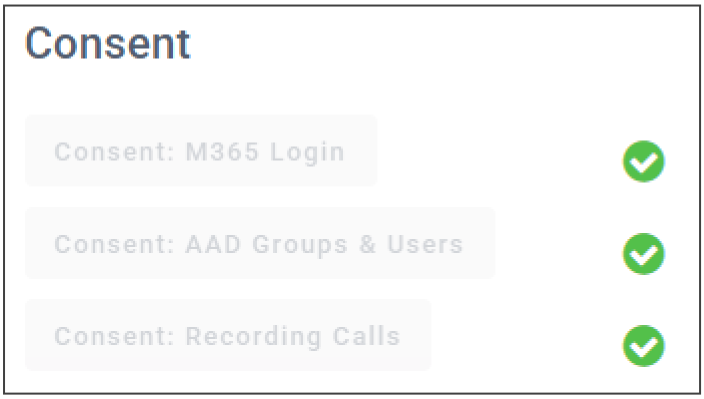
2. Under 'General' field, enter the Tenant Domain and Azure Tenant ID.

3. Click **Save**. After saving, you need to complete three consent actions.



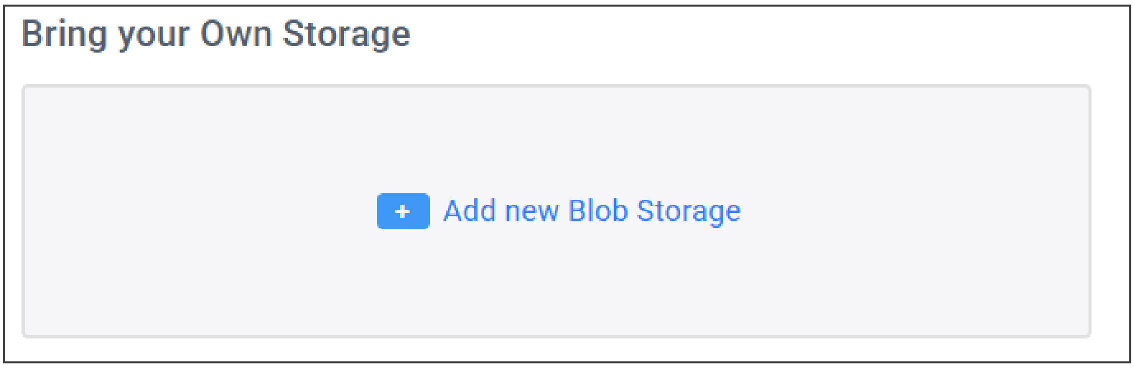
4. Click each of the buttons below and complete the Microsoft consent process. These consents are mandatory to enable call functionality in the customer's environment.

   - **Consent: M365 Login**
   - **Consent: AAD Groups & Users**
   - **Consent: Recording Calls**

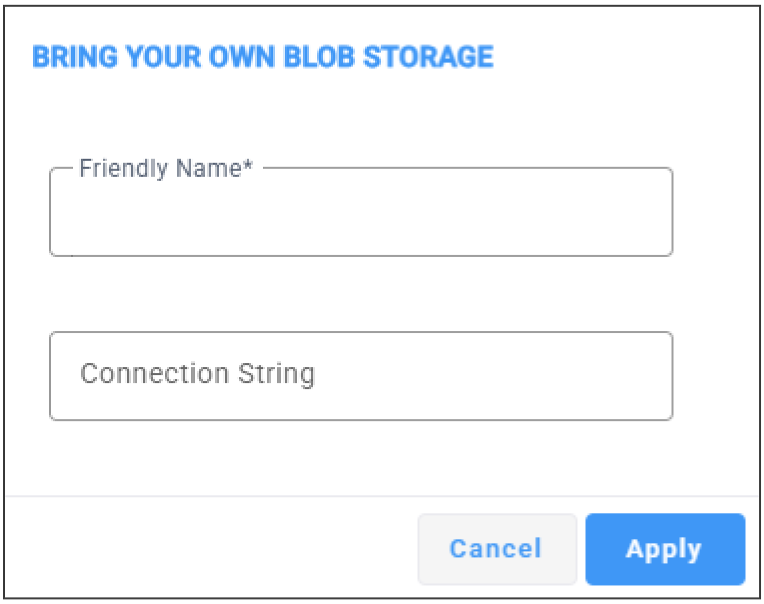


5. Once completed, you can optionally configure your own storage. You can add up to 10 external storage locations.

- This is only relevant if the customer prefers to use their own storage.
- By default, Voca provides built-in storage for up to 12 months.
- Customers requiring retention beyond 12 months must configure their own storage.



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



7. Click **Save Changes** to save your changes.

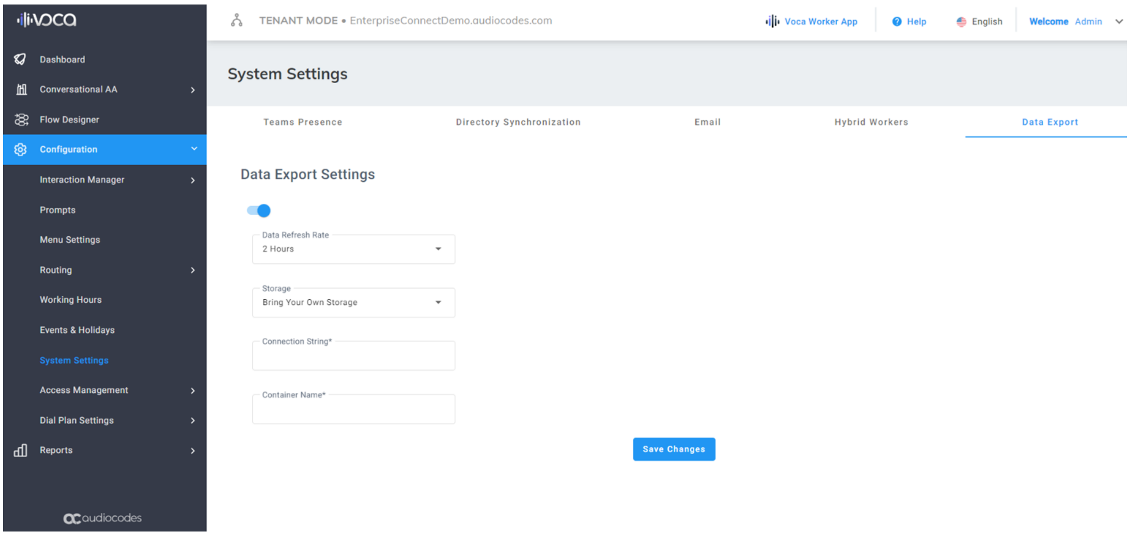
8. In the 'Friendly Name' field, enter a name for your storage.
9. Enter a connection string.An Azure Blob Storage connection string is a text value that specifies how your application connects to a specific storage account, including its location and authentication details.
10. Click **Apply**.

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 below
- Get Files: https://<domain>/api/DataExport/External/Files on the next page

Current Domain for All Voca CIC Environments

Region	Domain
IO	voca-dm.audiocodes.io
APAC	vocaau-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.

Configuring Users

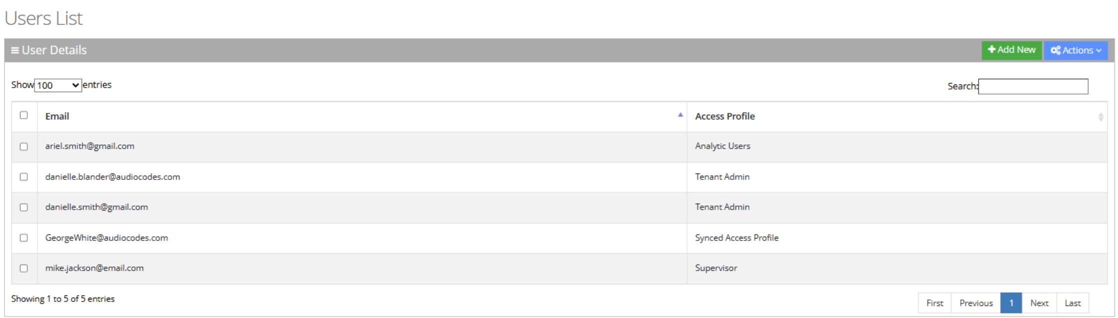
This section describes how to add, edit and delete users from the Users List.

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:**

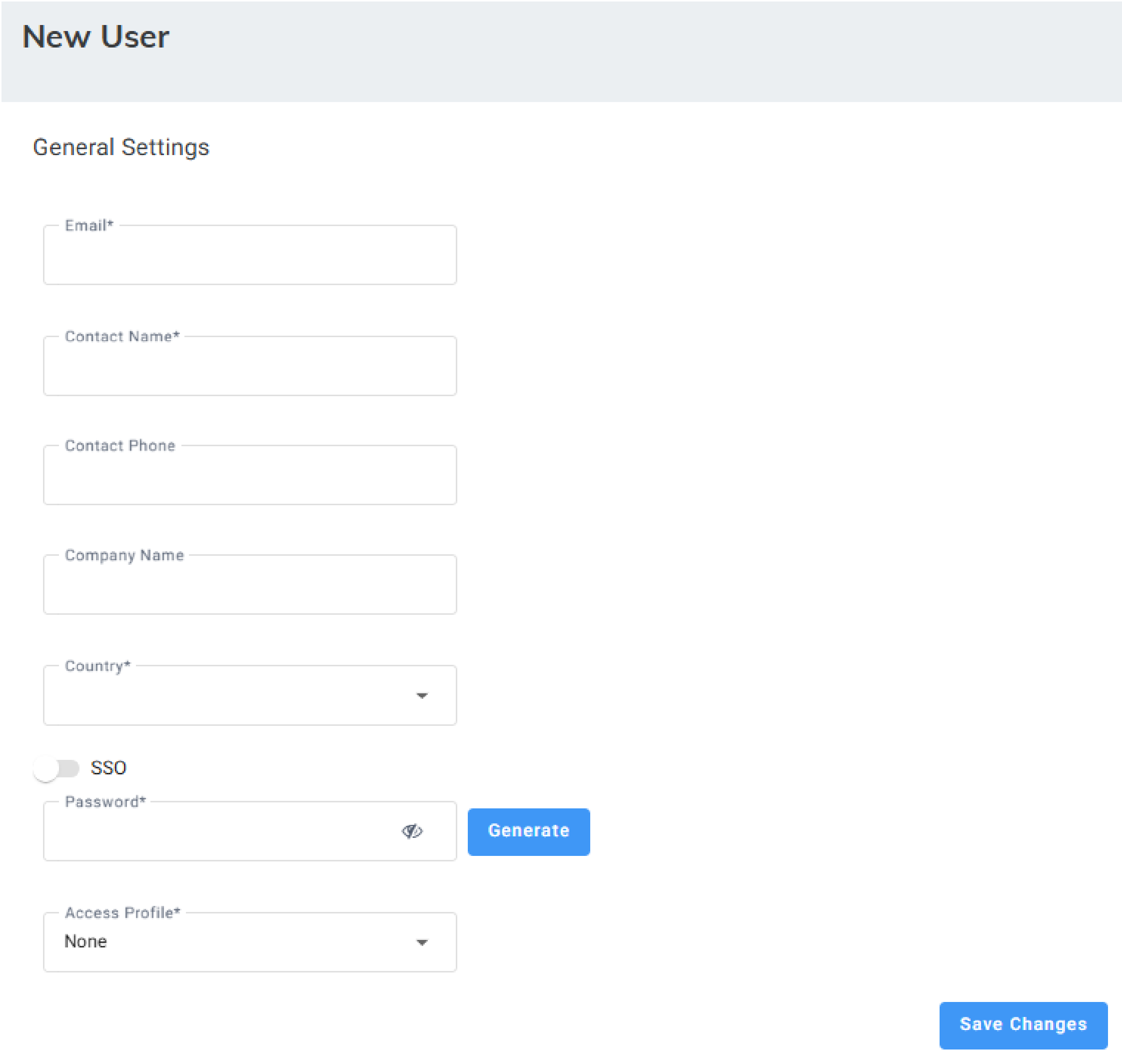
1. Open the User List page (**Configuration** > **Access Management** > **Users List**); the following appears:



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:



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:

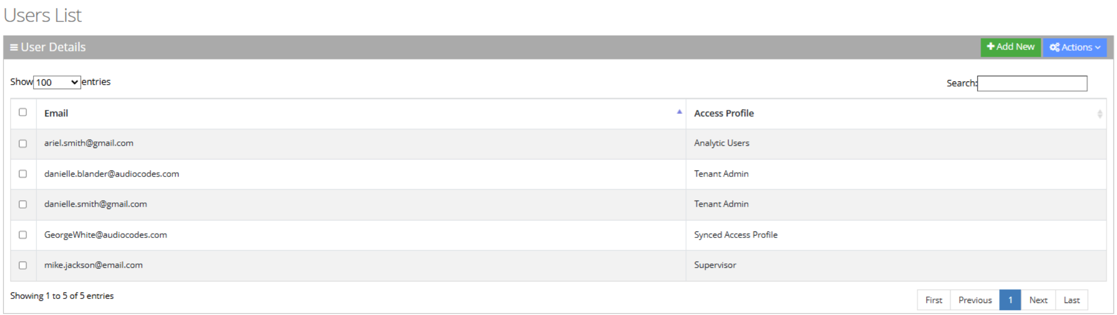
- The SSO user belongs to exactly one Azure Security Group
- The Azure Security Group is assigned to a profile on the Profile Page.

Editing Users

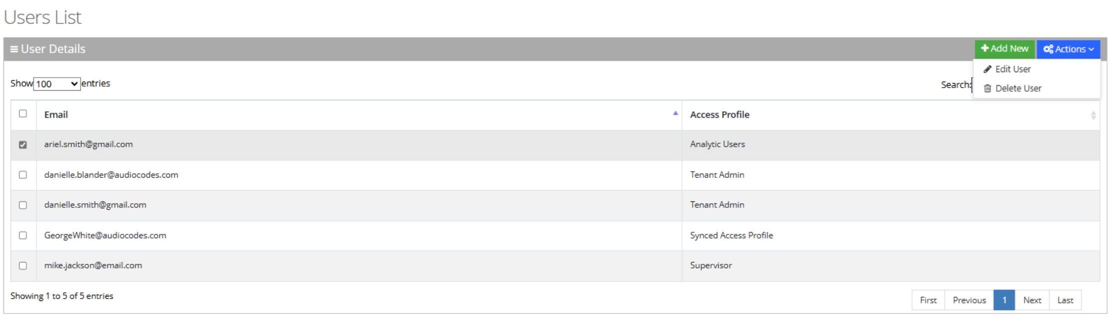
You can edit user details to change their access profile and enable or disable SSO.

➢ To edit a user:

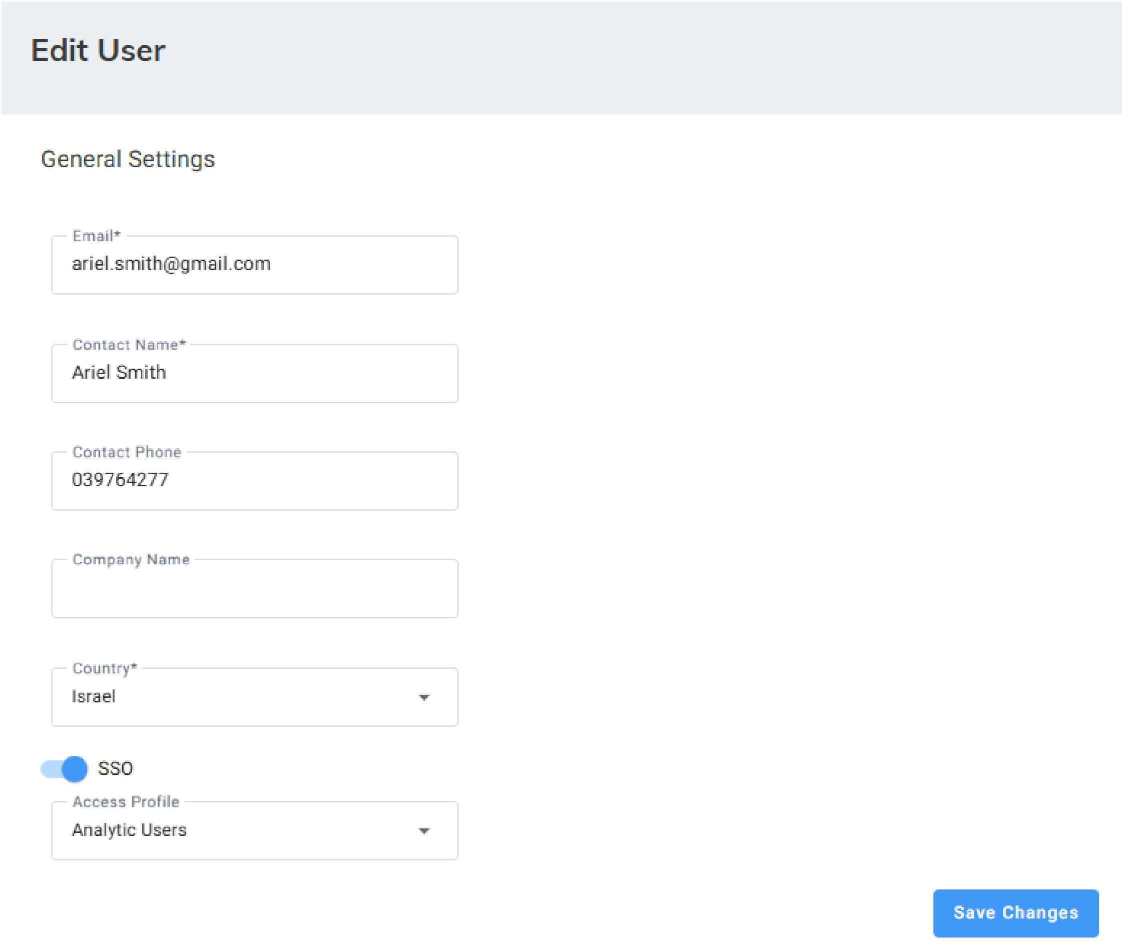
1. Open the User List page (**Configuration** > **Access Management** > **Users List**); the following appears:



2. Select the user that you want to edit.



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



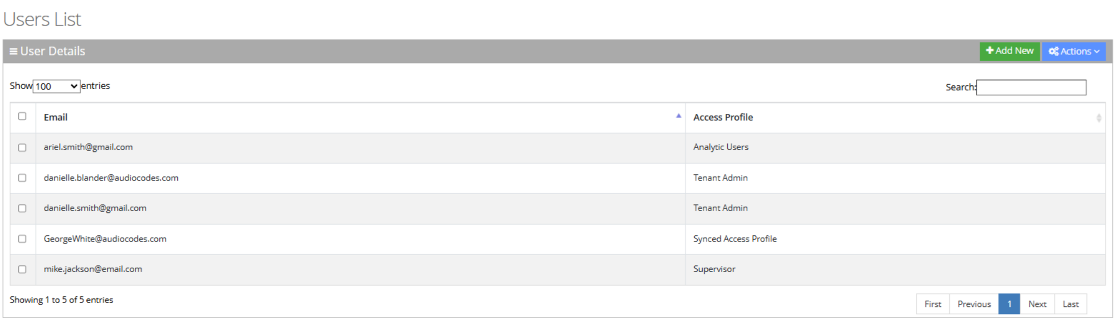
4. Edit the fields you want to change.
5. Click **Save Changes**.

Deleting Users

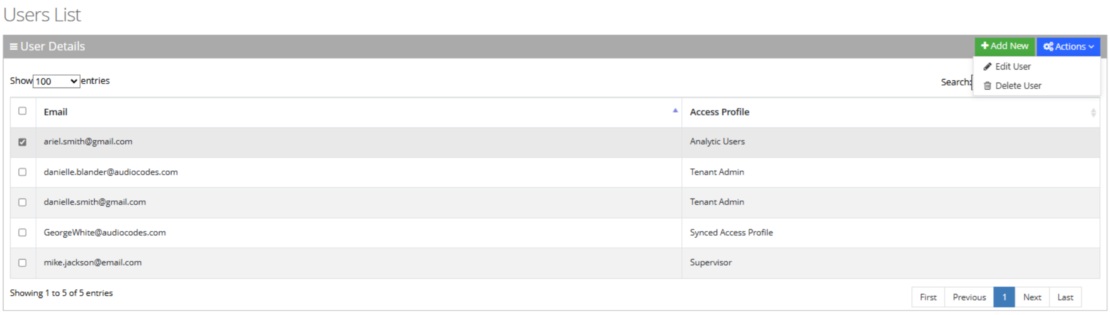
You can delete users from the Users List.

➢ To delete a user:

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



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



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

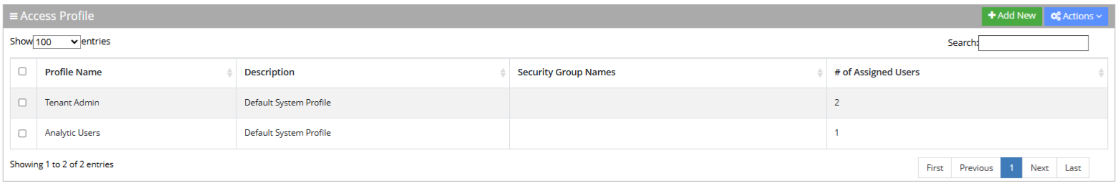
The Access Profile list comes with two built-in non-editable profiles (except AD Security Groups). The assignment to these profiles is similar to the assignment of manually configured profiles.

- **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:

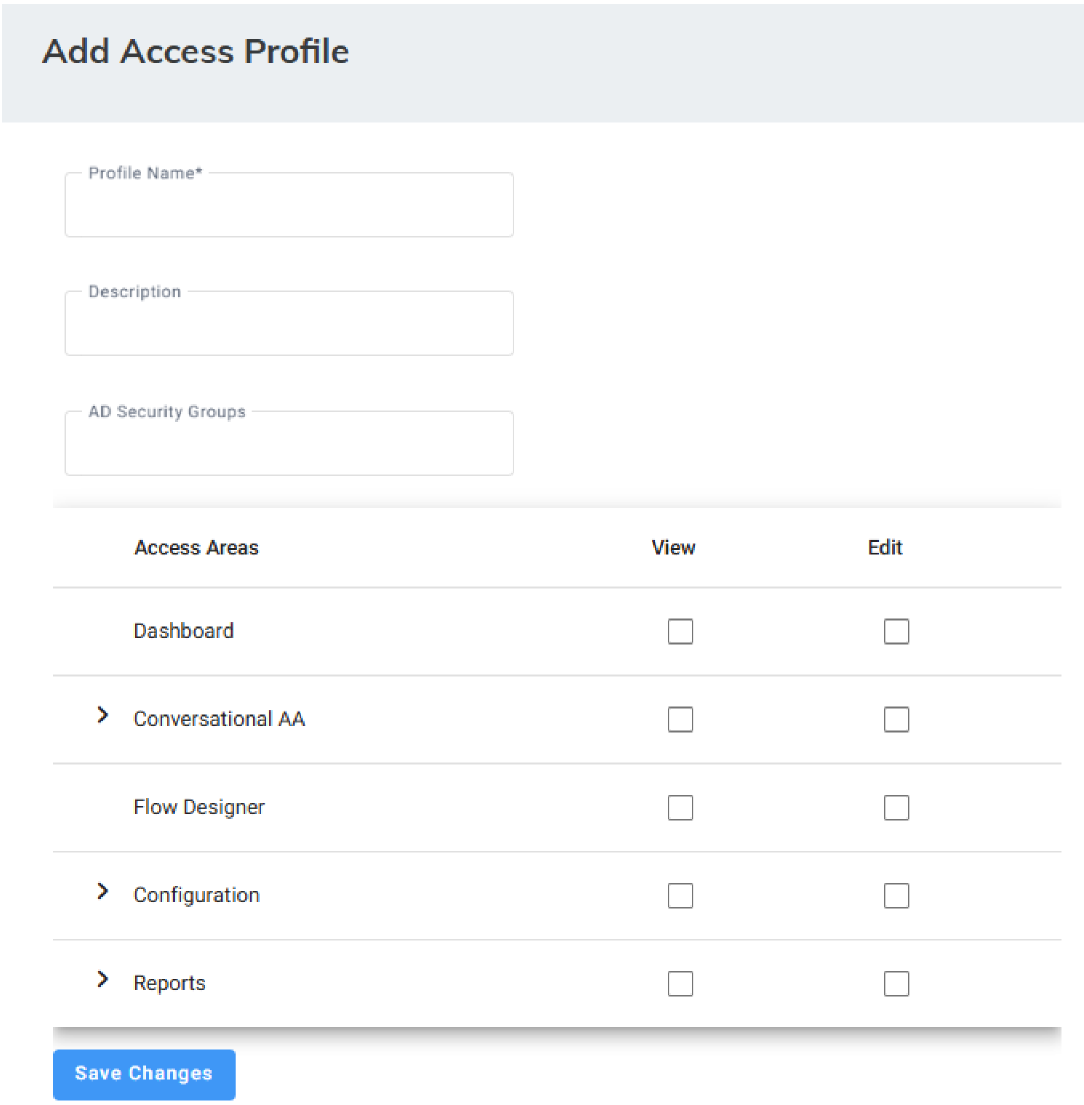
Access Profile



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:



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.

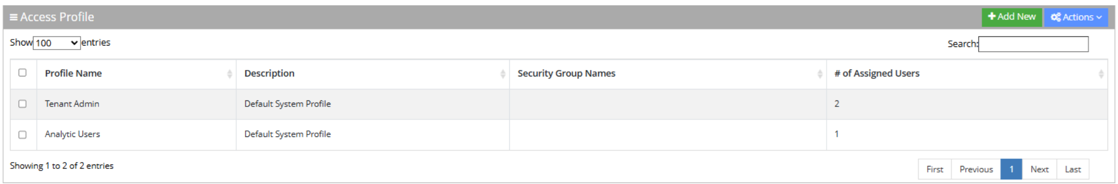
Editing Profiles

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:

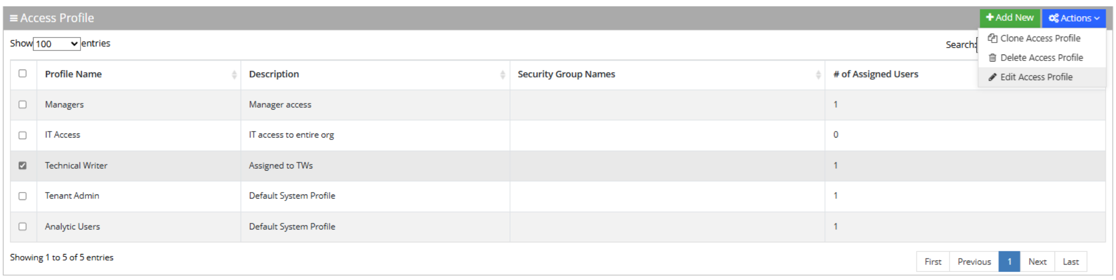
1. Open the User List page (**Configuration** > **Access Management** > **Access Profile**); the following appears:

Access Profile

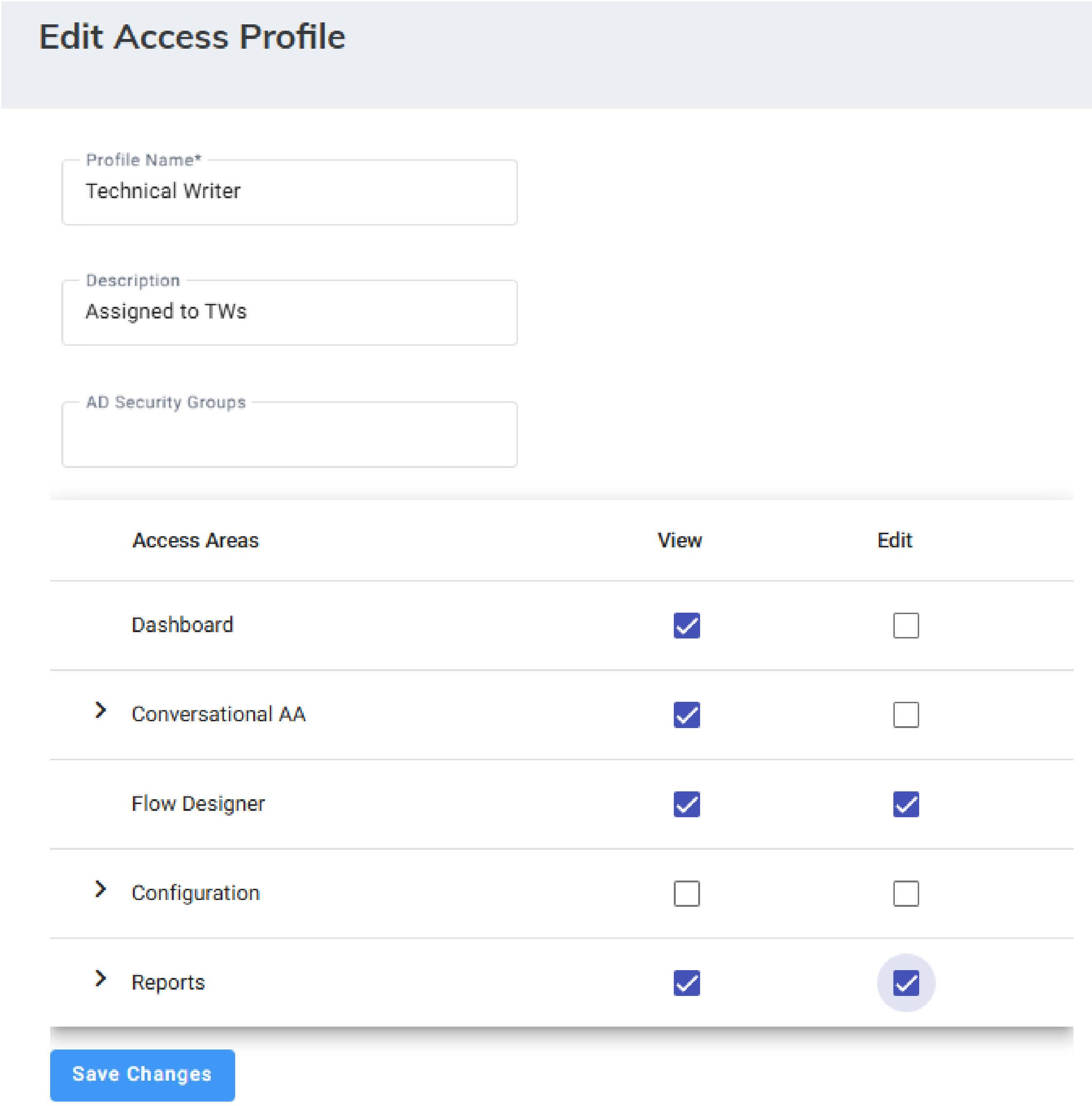


2. Select the profile that you want to edit.

Access Profile



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



4. Edit the fields you want to change.

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

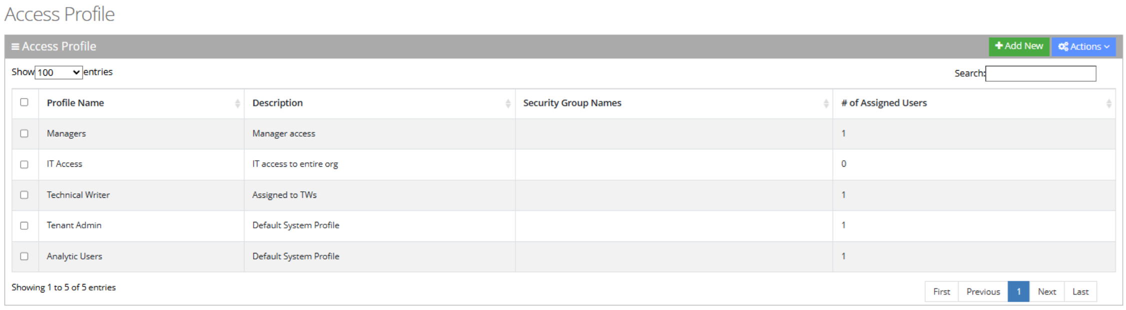
5. Click **Save Changes**.

Cloning Profiles

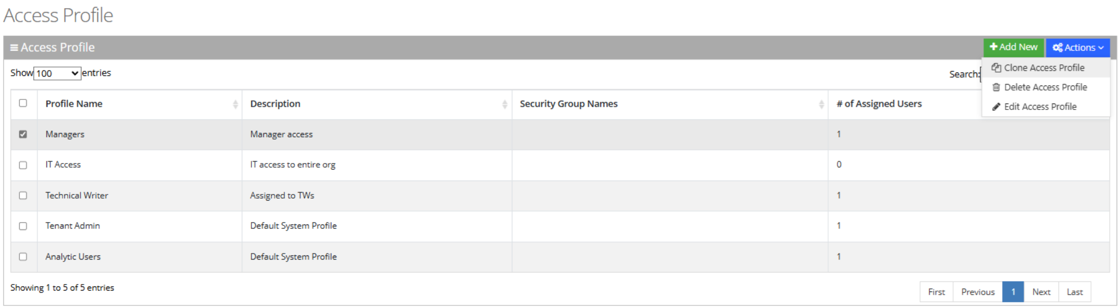
Clone custom profiles you created to quickly create new profiles with similar settings. You cannot clone the default predefined profiles (Tenant Admin and Analytic Users).

➢ To clone a profile:

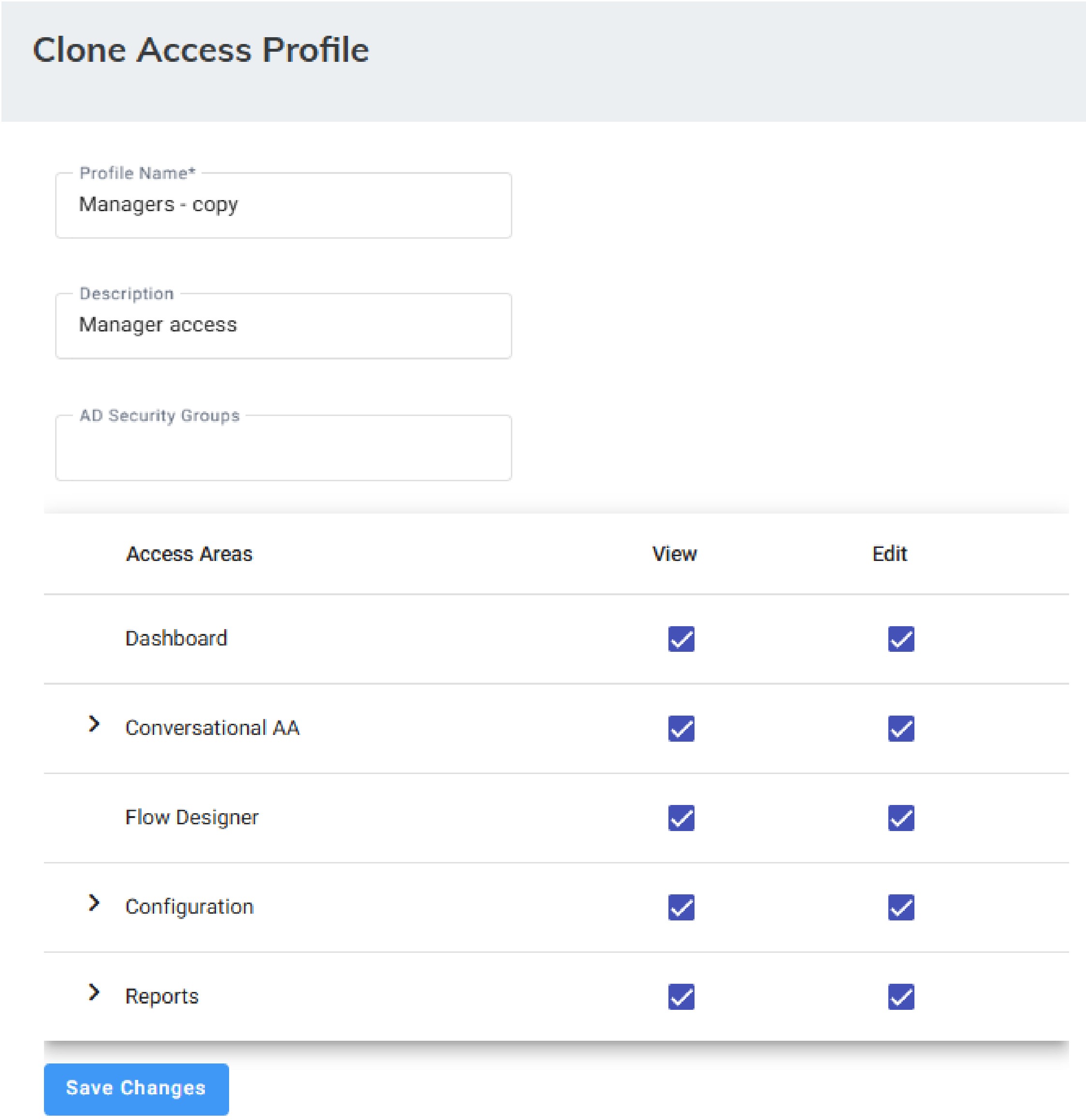
1. Open the User List page (**Configuration** > **Access Management** > **Access Profile**); the following appears:



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



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



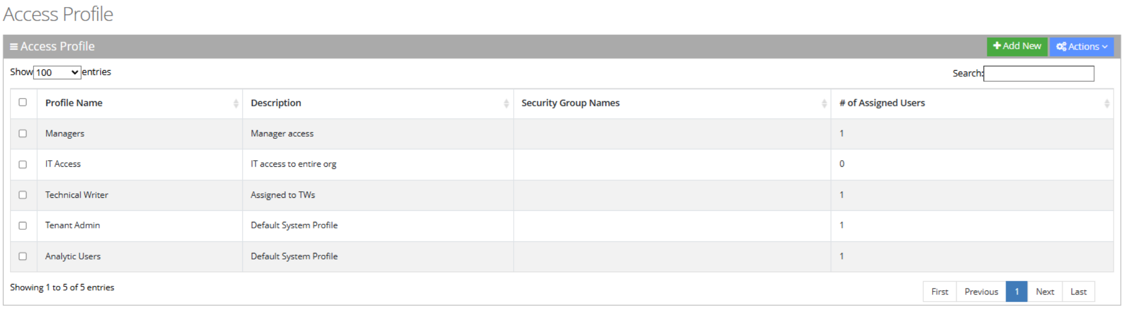
4. You can modify the profile or proceed without modification.
5. Click **Save Changes**.

Deleting Profiles

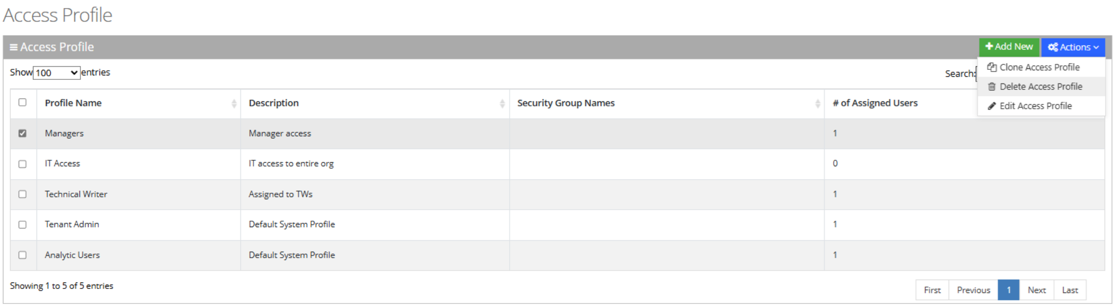
Delete custom profiles you created. You cannot delete the default predefined profiles (Tenant Admin and Analytic Users).

➢ To delete a profile:

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



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



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

4. Click **OK**.

Dialplan Settings

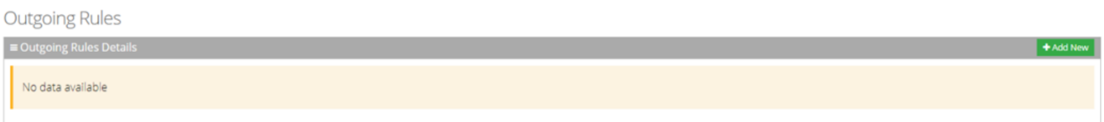
This section gives the Administrator the option to configure and manage inbound and outbound basic routing manipulations on Voca, sent out to the customer's SBC/IP PBX.

Configuring Outgoing Rules

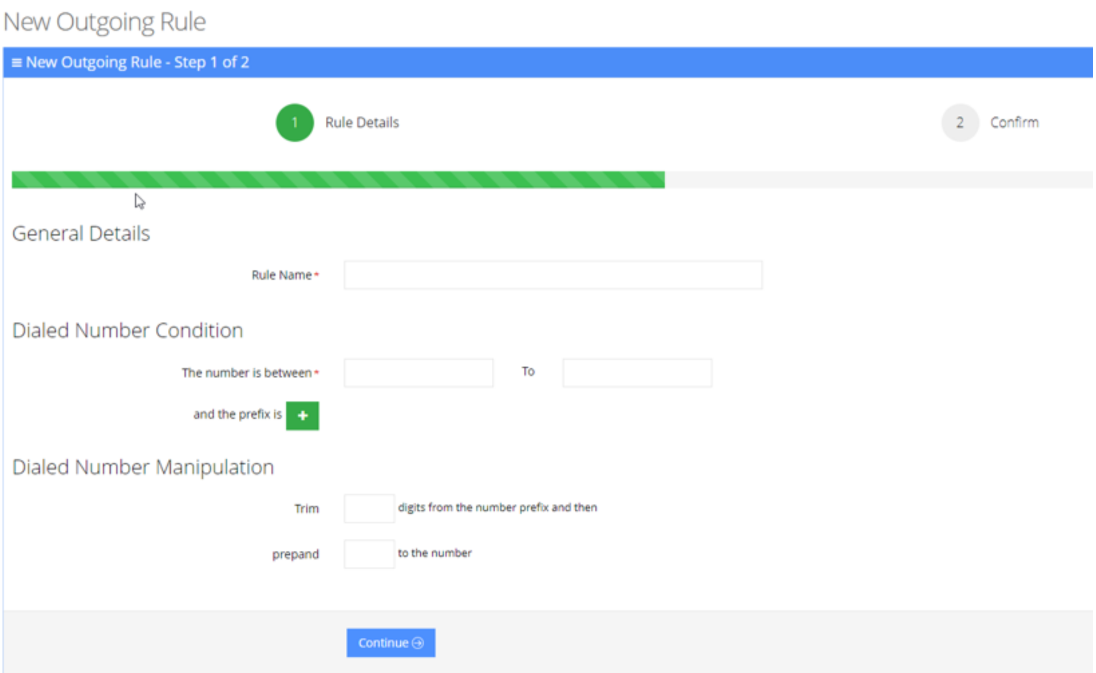
The procedure below describes how to define outgoing phone number manipulation rules.

➢ To create a new outgoing rule:

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



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



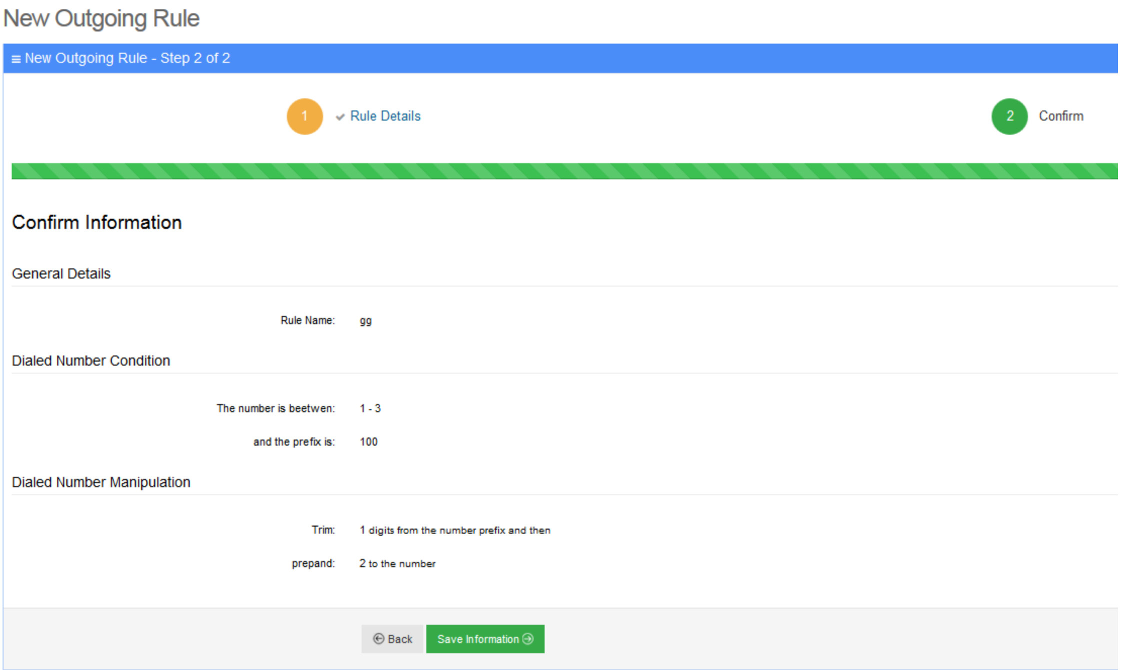
3. Under the General Details group, in the 'Rule Name' field, enter the name of the new manipulation rule to be added.

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

5. Click the Green plus  button to enter a prefix.

6. Under the Dialed Number Manipulation group:
   - In the 'Trim' field, enter the number of digits to be removed from the prefix of the Destination number.
   - In the 'Prepend' field, enter the number to be added to the Destination number.

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



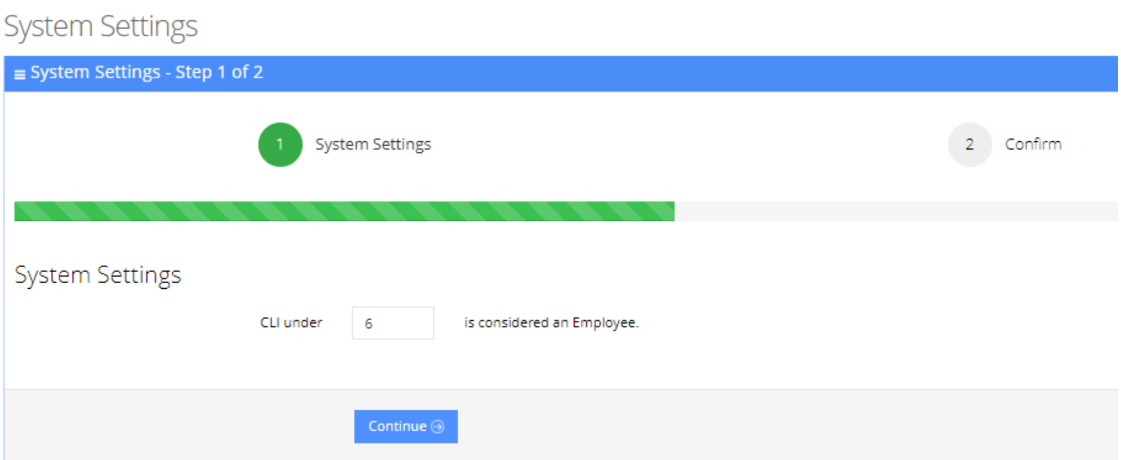
8. Click **Save Information**.

Configuring Incoming Rules

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

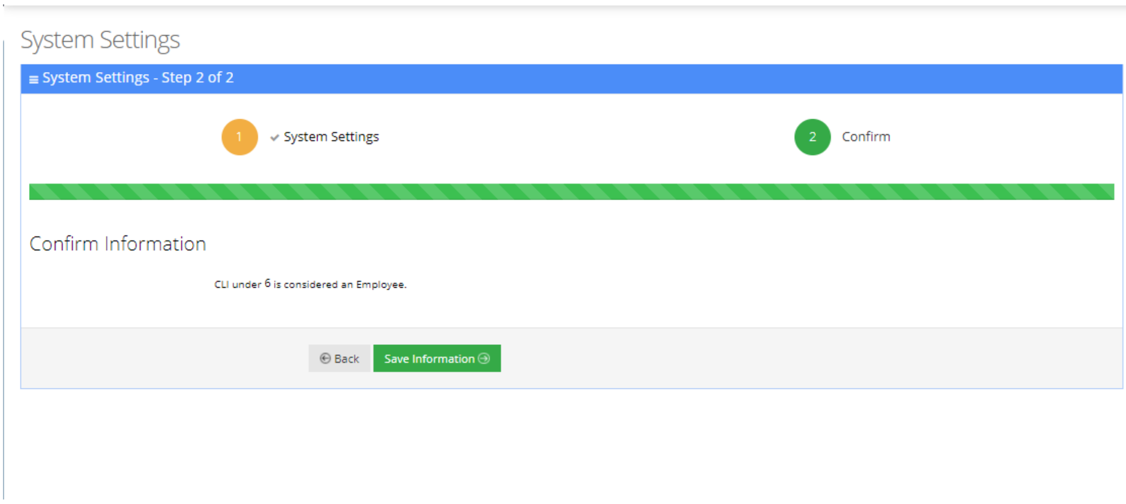
➢ To configure a new incoming rule:

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



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

3. Click **Continue**.



4. Click **Save Information**.

7 Generating Reports

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

- Call Queue Reports
- Interaction Center Reports
- IVR Reports

Call Queue Reports

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

- Report Scheduler
- Journey Manager 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.

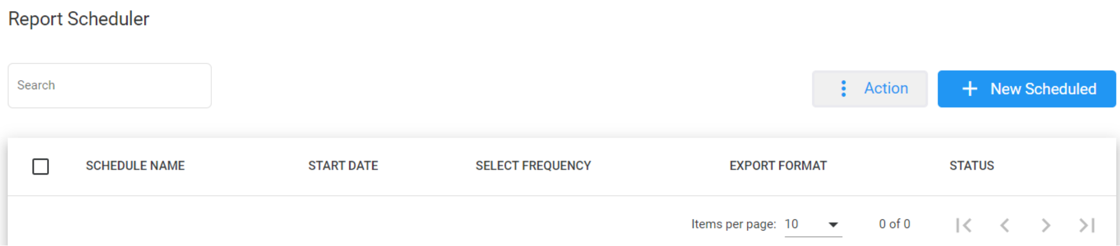
> The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click here.

Adding a Report Scheduler

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

➢ **To add a new Report Scheduler:**

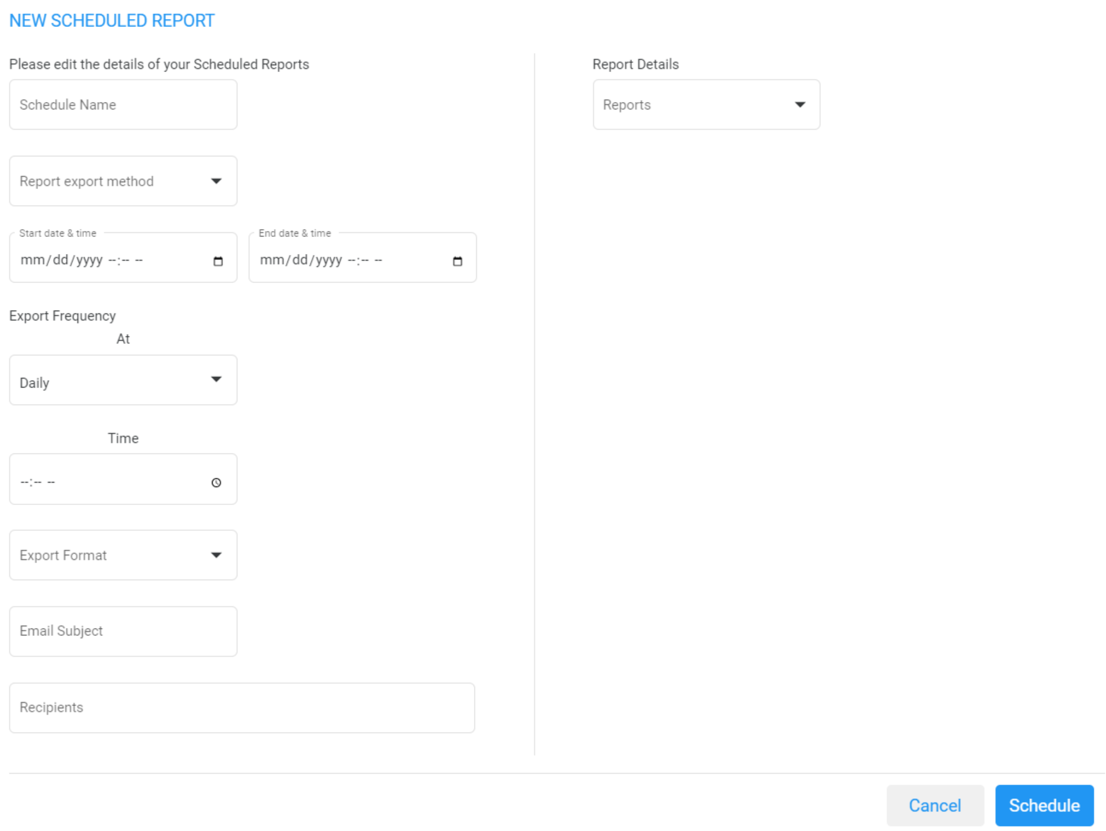
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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

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

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



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

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

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

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

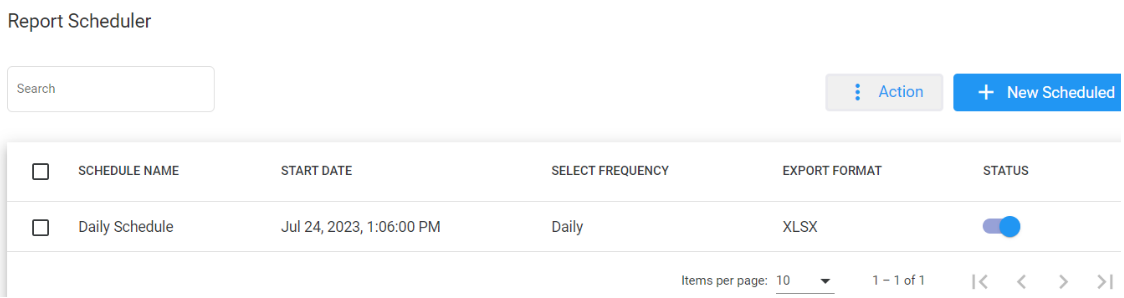
6. Click **Save Changes**.

Editing a Report Scheduler

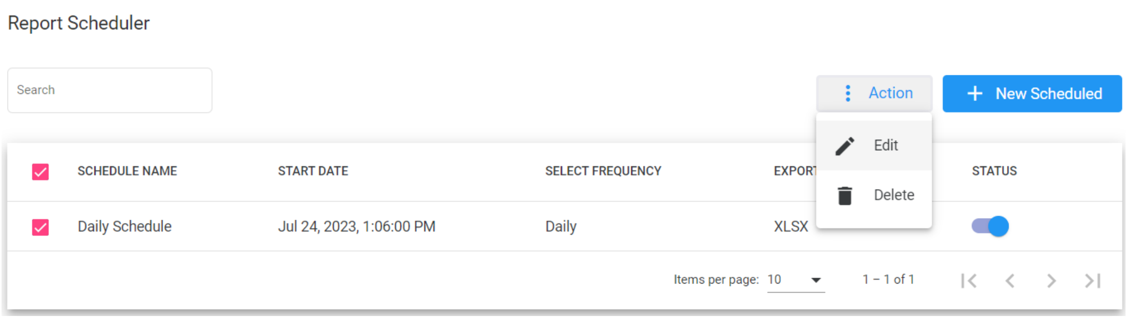
The procedure below describes how to edit a Report Scheduler.

➢ To edit a Report Scheduler:

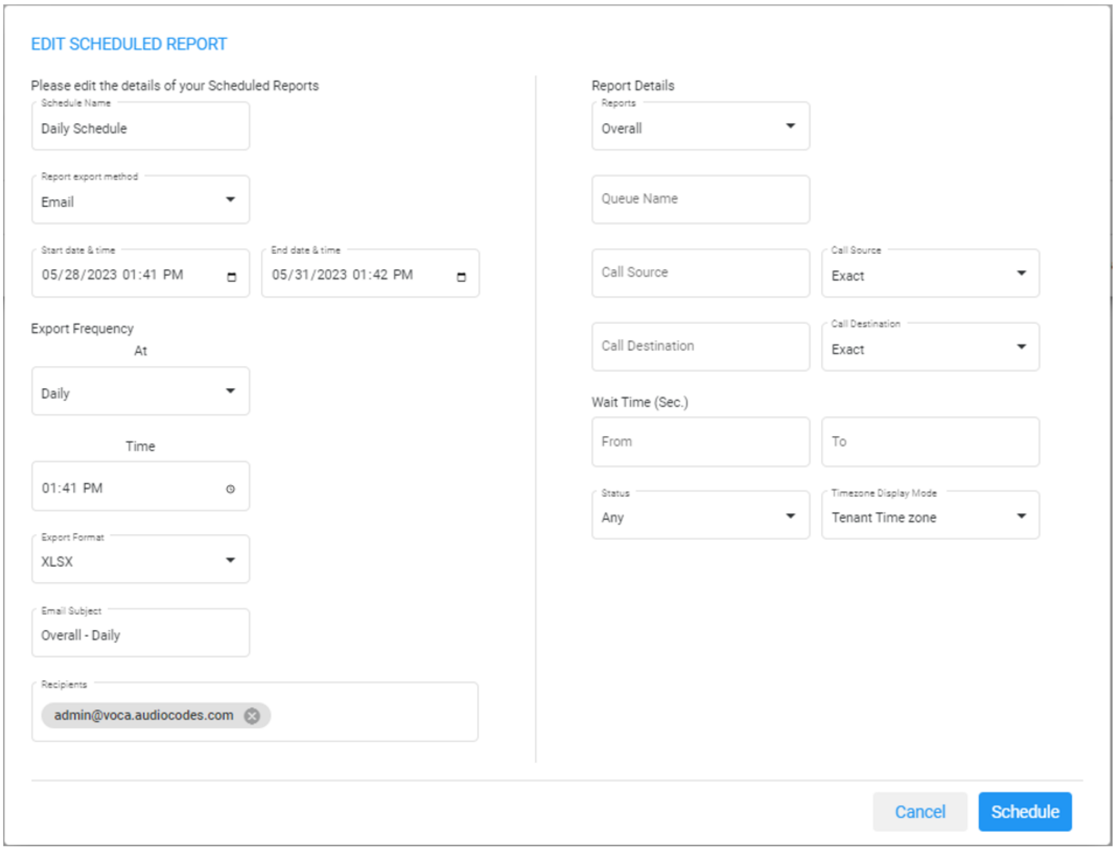
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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



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



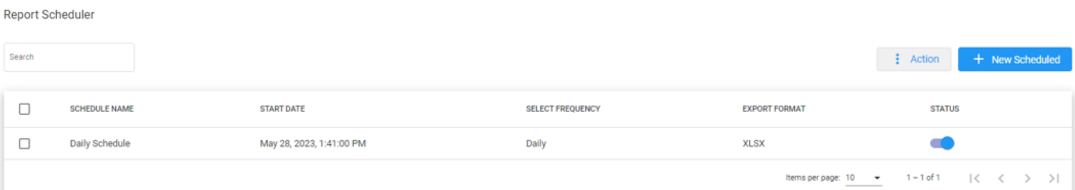
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Delete a Report Scheduler

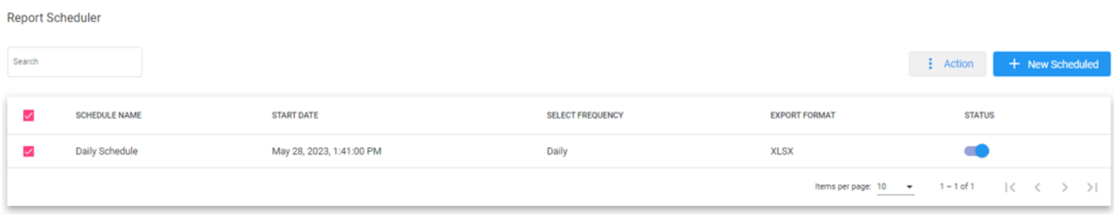
The procedure below describes how to delete a Report Scheduler.

➢ To delete a Report Scheduler:

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



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



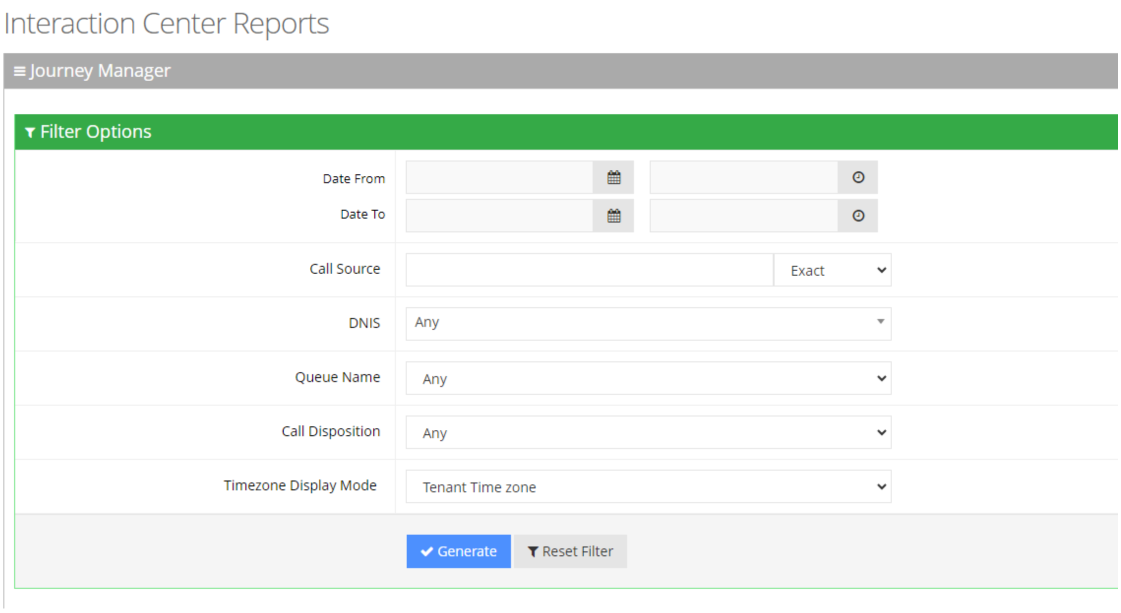
3. From the ‘Actions’ drop-down menu, choose **Delete**.

Journey Manager Report

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

➢ To generate the Journey Manager report:

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



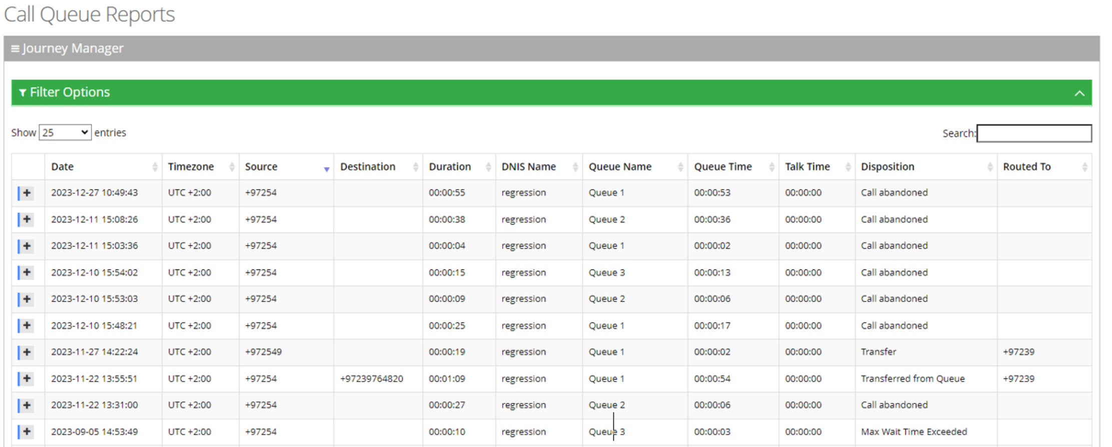
2. Select the appropriate filter fields to generate your report:

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

- **Call Disposition:** Defines information that relate to calls that end with a specific disposition or "Any'. For an explanation of the different call disposition, refer to Call Dispositions on page 278.
- **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

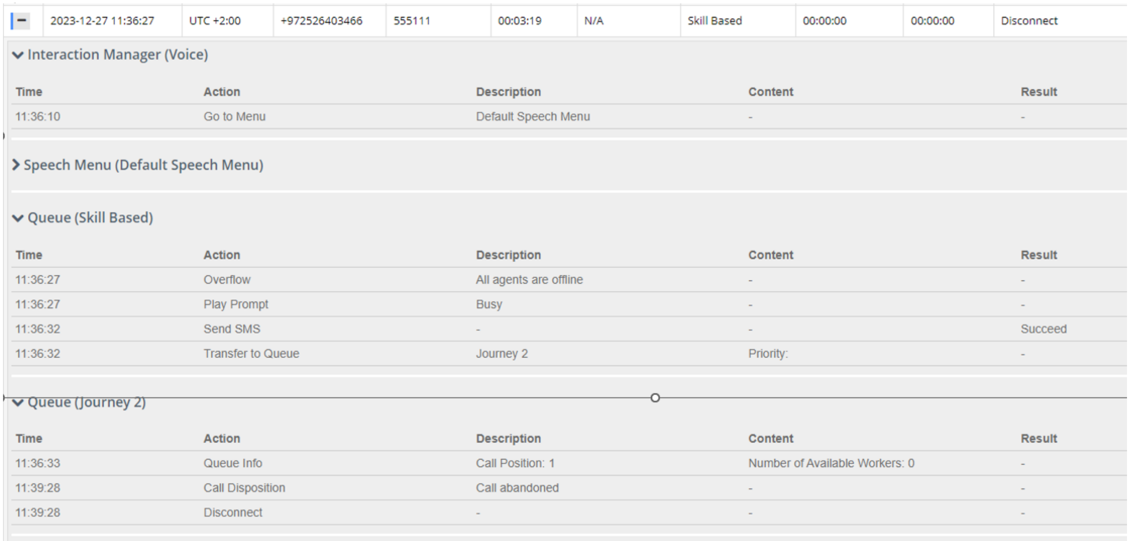
≡ Journey Manager

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.


−	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)

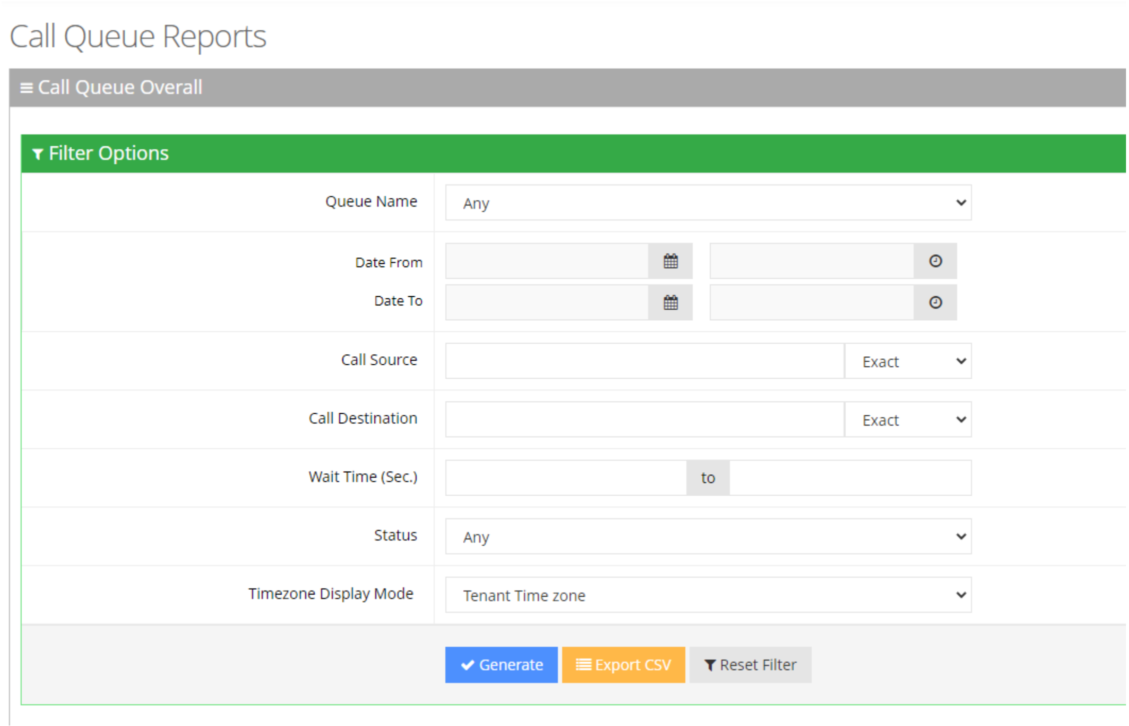
Time	Action	Description	Content	Result
11:36:33	Queue Info	Call Position: 1	Number of Available Workers: 0	-
11:39:28	Call Disposition	Call abandoned	-	-
11:39:28	Disconnect	-	-	-

Overall Report

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

➢ To generate an Overall report:

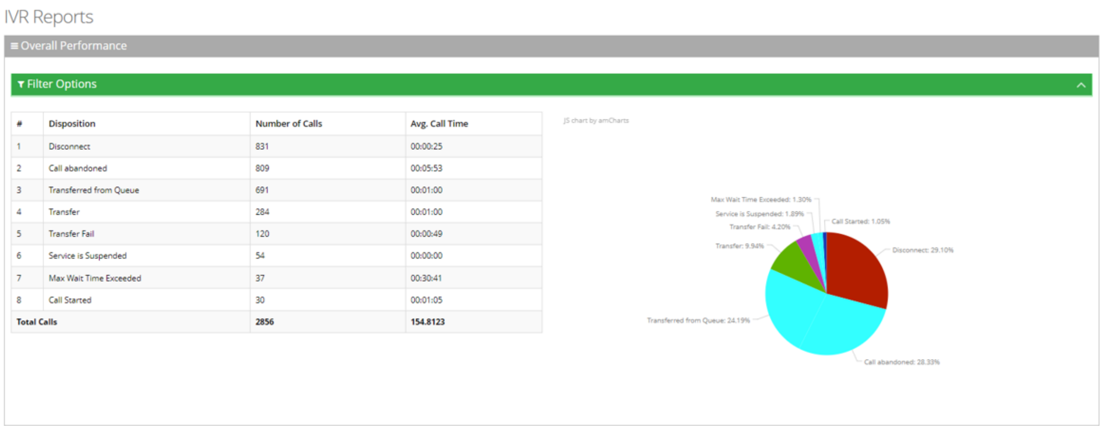
1. Open the Overall Report page (**Reports** > **Call Queues Reports** > **Overall**); the following appears.



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

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

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

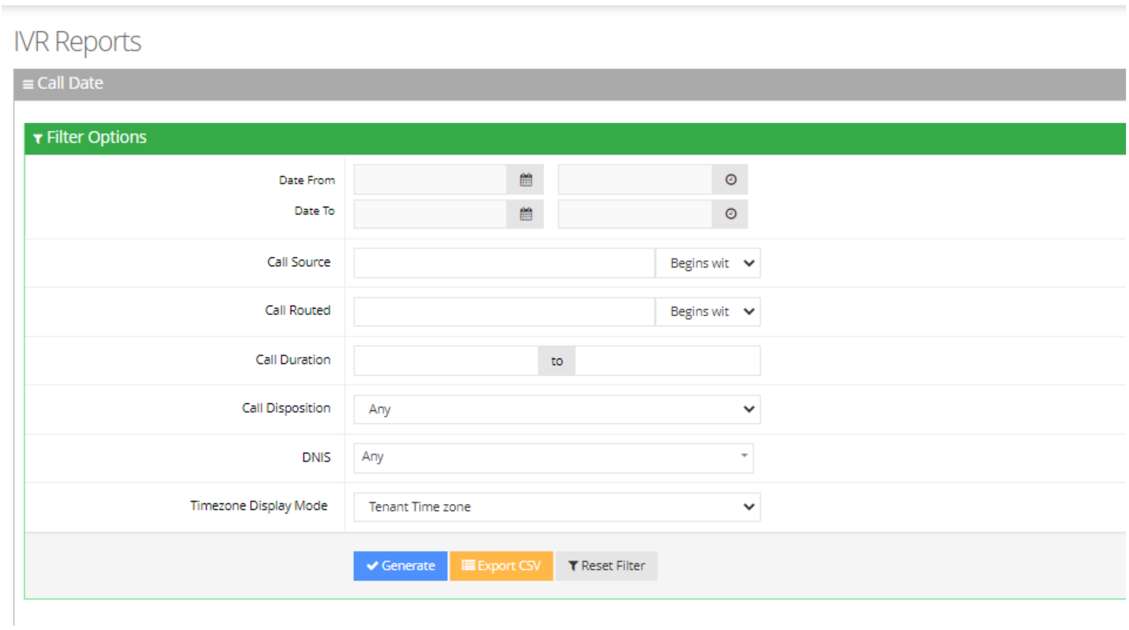


Call Date Report

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

➢ To generate a Call Date IVR report:

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



2. Select the appropriate filter fields:

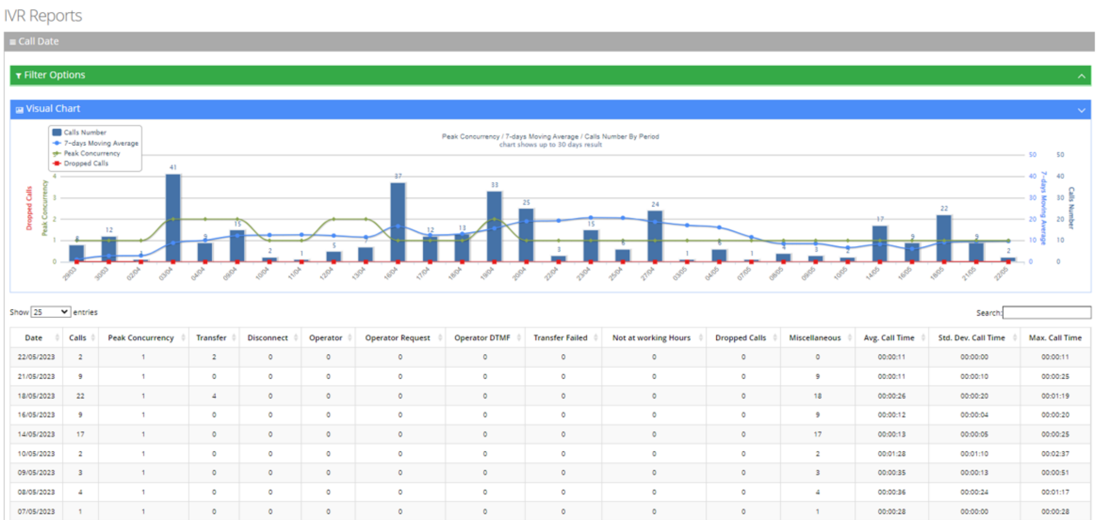
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Call Source:** Defines information that is related to a specific source number.
- **Call Routed:** Defines information that is related to a call that was routed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

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

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

Field	Description
Transfer Fail	Defines the number of calls that failed to be transferred.
Not at Working Hours	Defines the number of calls that entered the system, outside of the working hours.
Dropped Calls	Defines the number of calls dropped by the Media Gateway module when it exceeds the number of the concurrent channel license capacity. This deposition parameter represents the dropped calls for the past day. The calls are dropped when the Media Gateway module, which controls the total number of IVR ports, is configured with X number of channels. The X+1 call is rejected by the Media Gateway with SIP Error 404.
Miscellaneous	Defines the number of calls that do not come under other dispositions in this report.
Average Call Time (sec)	Defines the average call time in seconds.
STD Dev Call Time (sec)	Defines the standard deviation in call time in seconds.
Max Call Time (sec)	Defines the maximum call time in seconds.

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



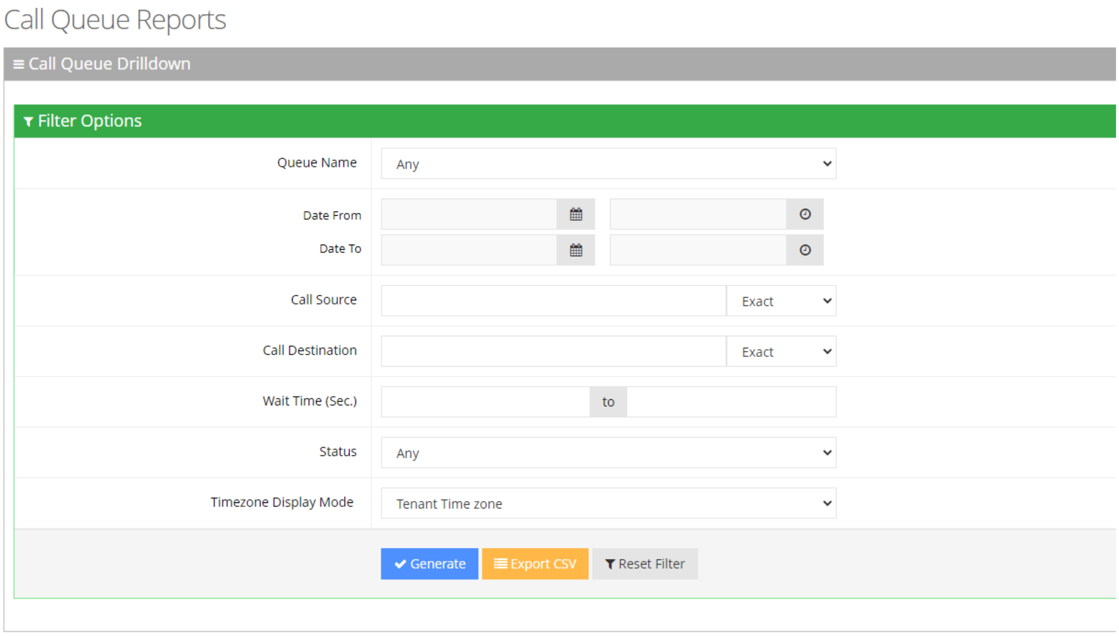
Date	Calls	Peak Concurrency	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Dropped Calls	Miscellaneous	Avg. Call Time	Std. Dev. Call Time	Max. Call Time
22/05/2023	2	1	2	0	0	0	0	0	0	0	0	00:00:11	00:00:00	00:00:11
21/05/2023	9	1	0	0	0	0	0	0	0	0	9	00:00:11	00:00:10	00:00:25
18/05/2023	22	1	4	0	0	0	0	0	0	0	18	00:00:26	00:00:20	00:01:19
16/05/2023	9	1	0	0	0	0	0	0	0	0	9	00:00:12	00:00:04	00:00:20
14/05/2023	17	1	0	0	0	0	0	0	0	0	17	00:00:13	00:00:05	00:00:25
10/05/2023	2	1	0	0	0	0	0	0	0	0	2	00:01:28	00:01:10	00:02:37
09/05/2023	3	1	0	0	0	0	0	0	0	0	3	00:00:35	00:00:13	00:00:51
08/05/2023	4	1	0	0	0	0	0	0	0	0	4	00:00:36	00:00:24	00:01:17
07/05/2023	1	1	0	0	0	0	0	0	0	0	1	00:00:28	00:00:00	00:00:28

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 Report**s > **Drilldown**); the following appears:

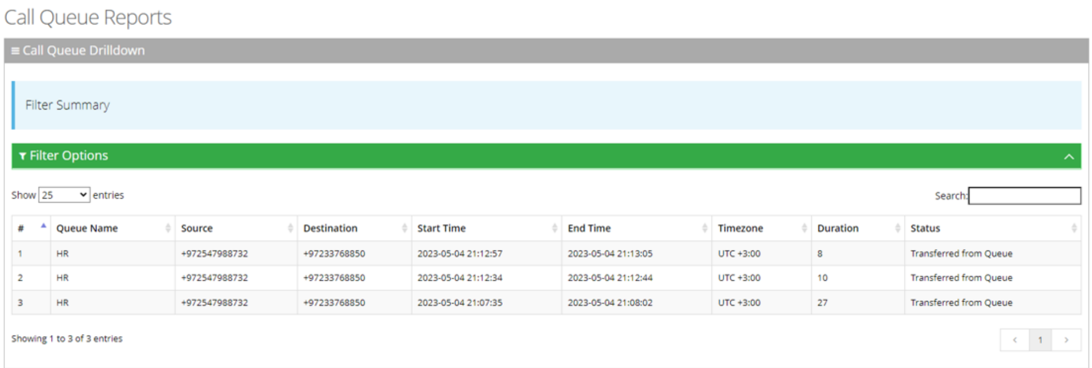


2. Select the appropriate filter fields:

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

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

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

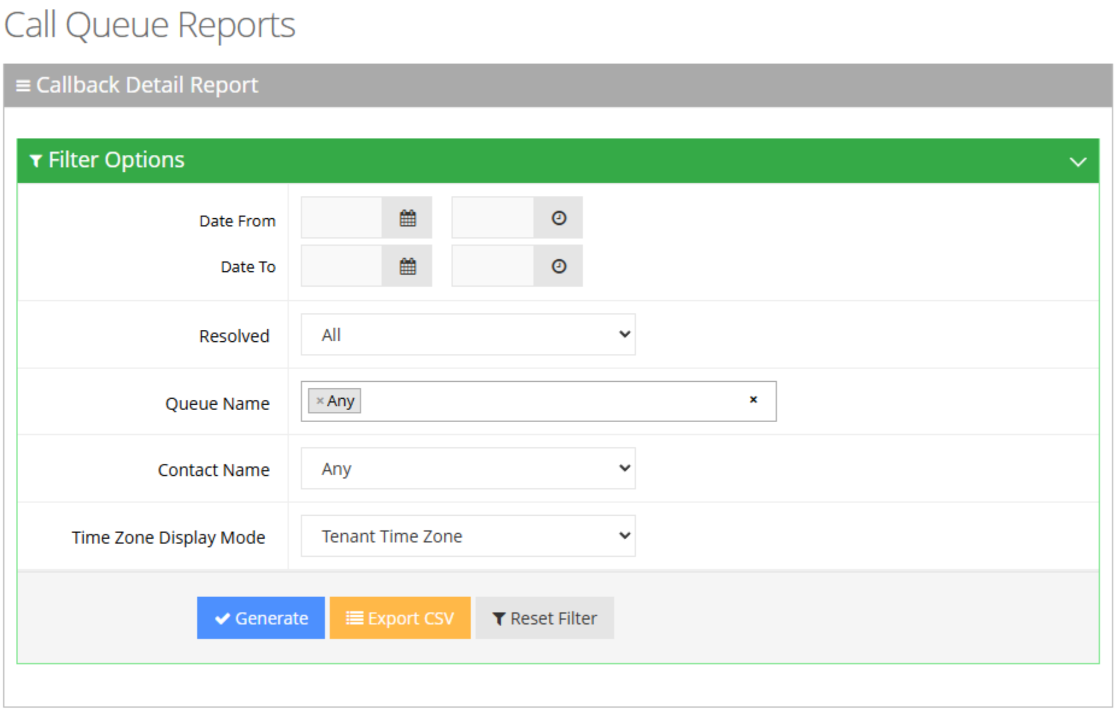


Callback Detail Report

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**).



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")

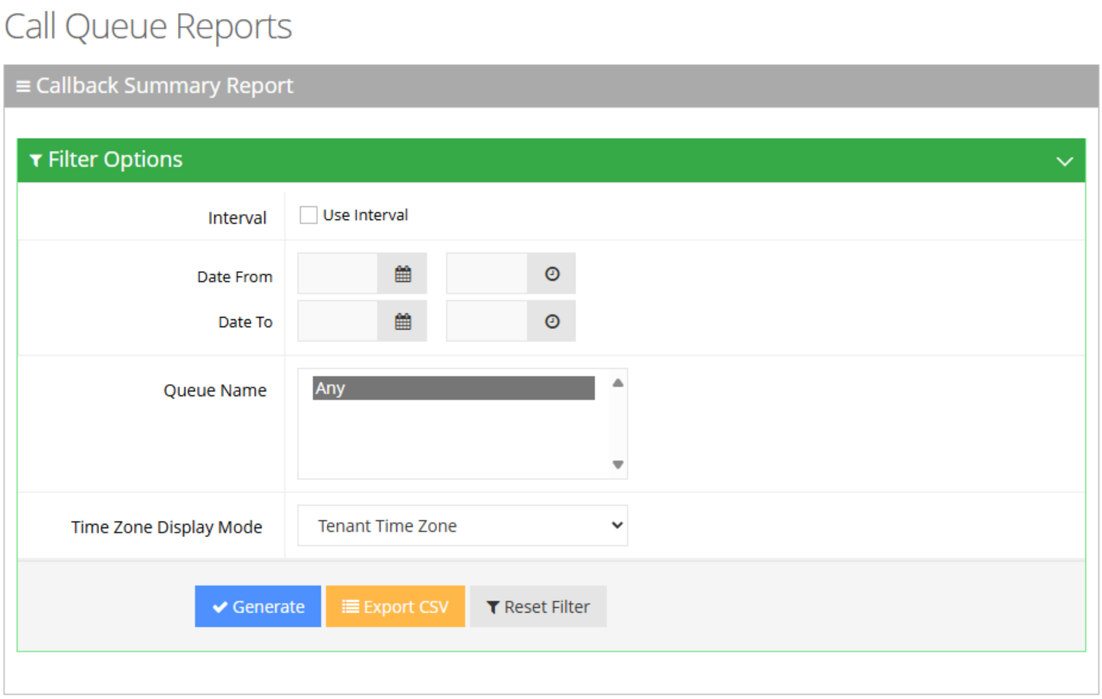
4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.

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:



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

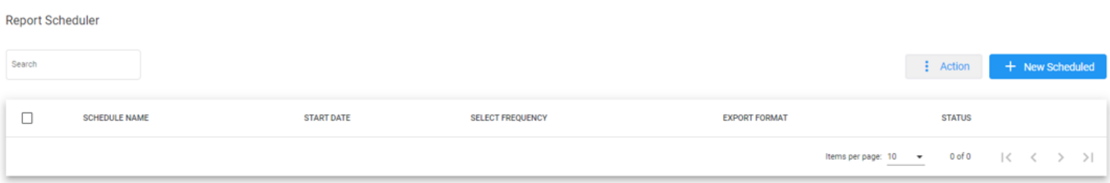
The Real-Time Dashboard provides an easy way to monitor the queue activity and to get real-time insights on queues.

Adding a New Dashboard

The procedure below describes how to add a new dashboard.

➢ **To add a new dashboard:**

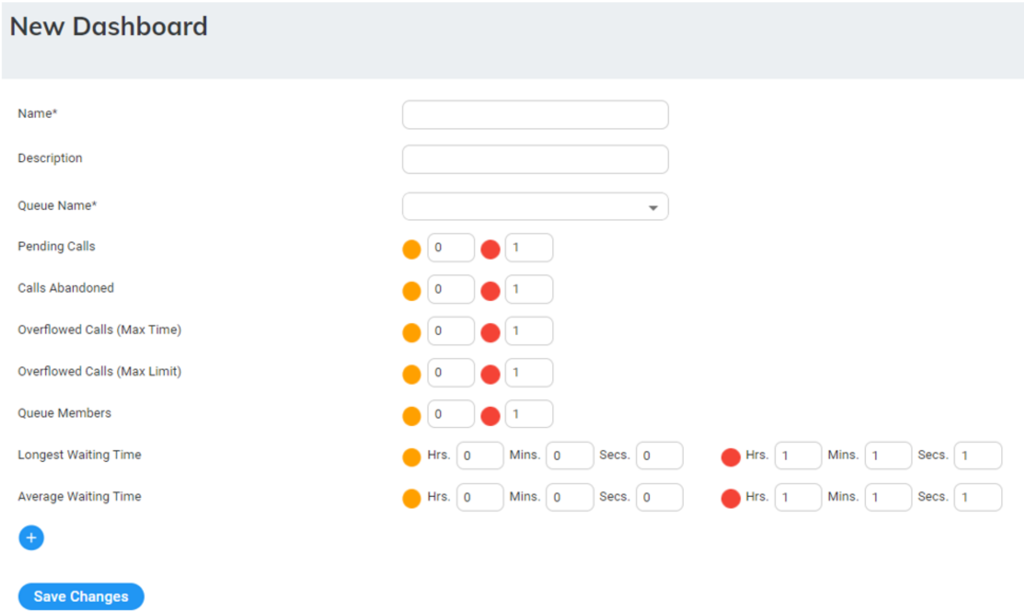
1. Open the Dashboards page (**Reports > Call Queue Reports > Real-time Dashboard**); the following appears:



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:



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.

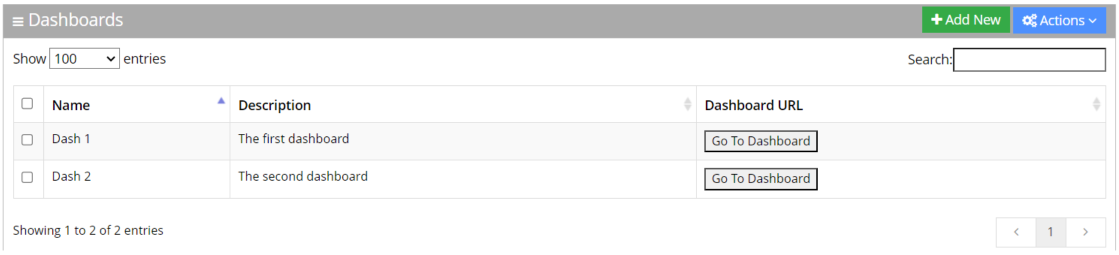
- The graphic view is generated automatically when up to two queues are configured. If more than two queues are configured, the dashboard displays a table view. The dashboard's data is reset every 24 hours at 00:00.

Editing a Dashboard

The procedure below describes how to edit a dashboard.

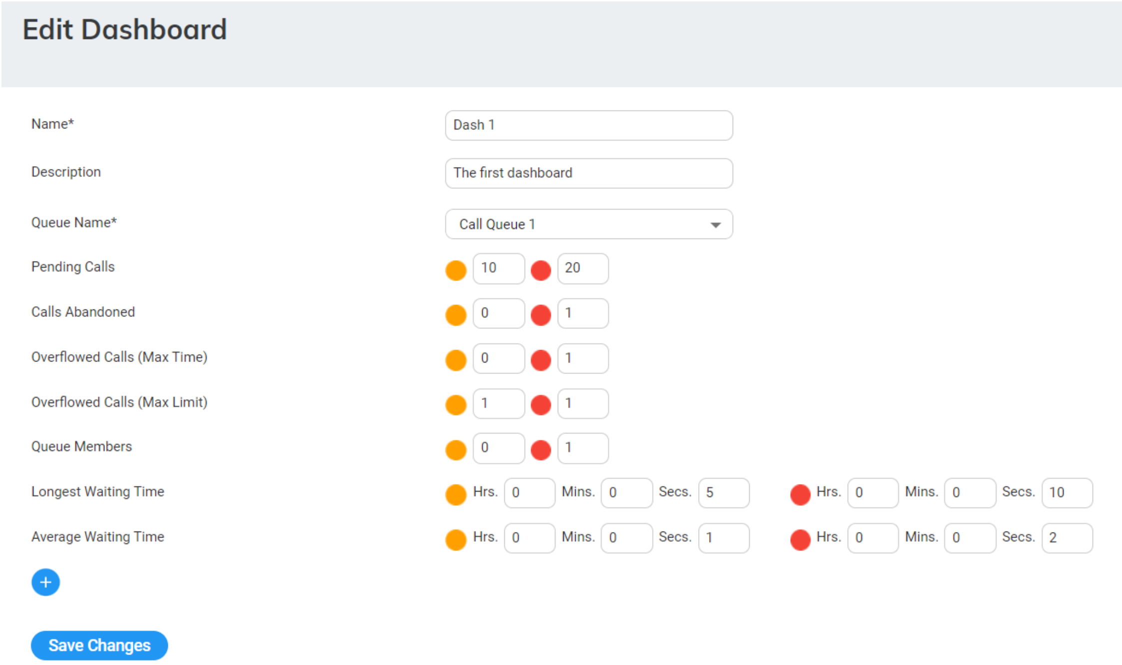
➢ To edit a dashboard:

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:



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

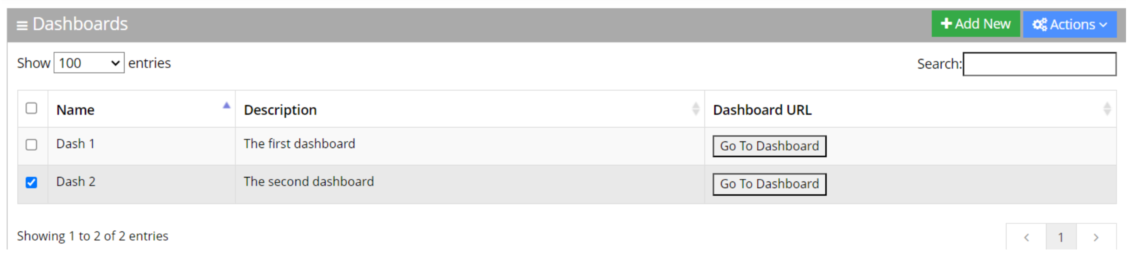
Deleting a Dashboard

The procedure below describes how to delete a dashboard.

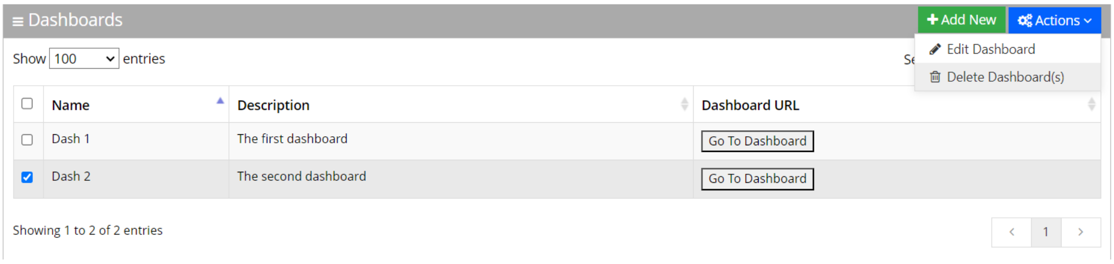
➢ To delete a dashboard:

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

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



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



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

5. Click **OK** to delete the selected dashboard.

Interaction Center Reports

You can generate the following Interaction Center historical reports:

- 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.

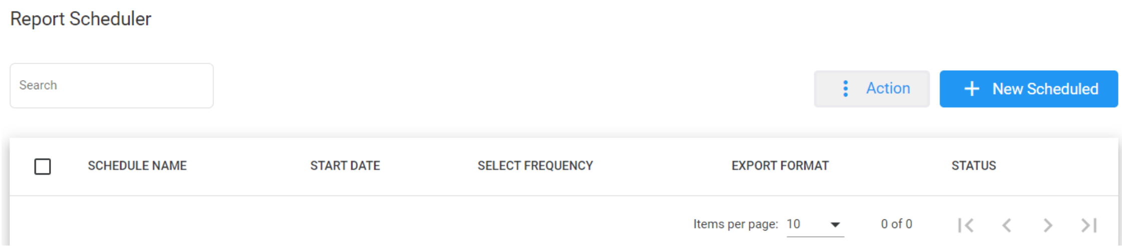
> The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click here.

Adding a Report Scheduler

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

➢ **To add a new Report Scheduler:**

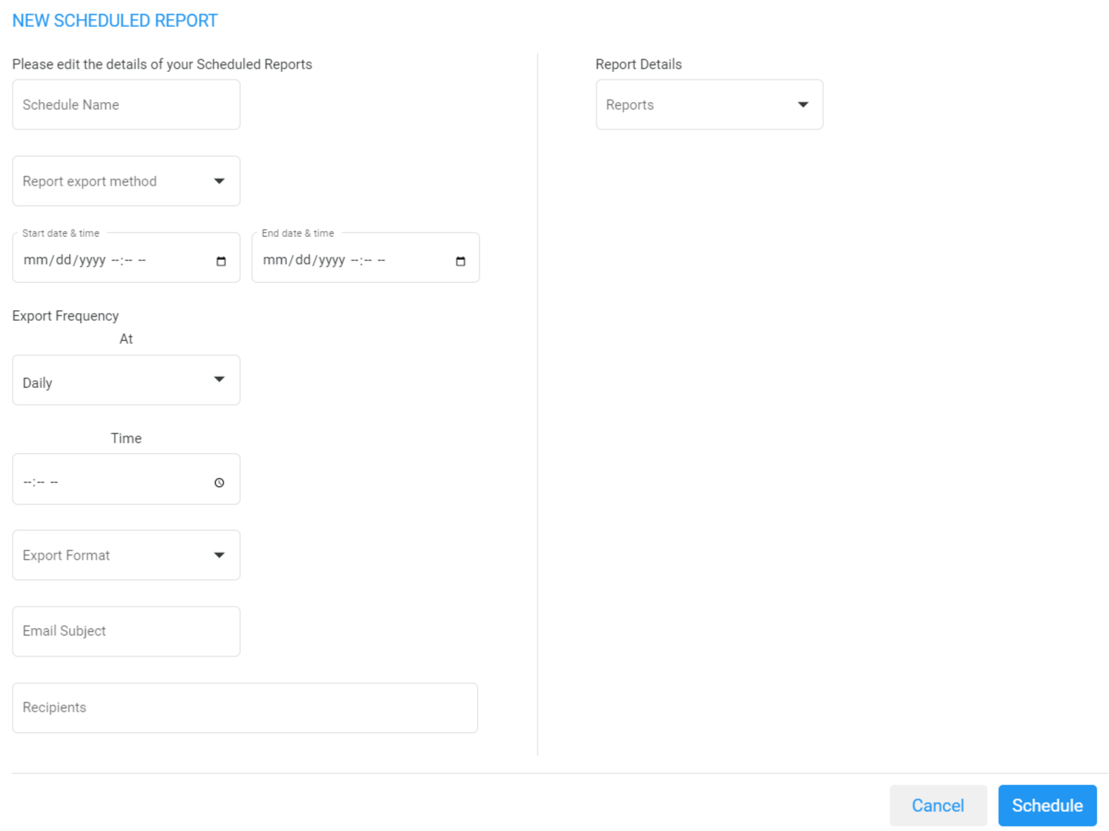
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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

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

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



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

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

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

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

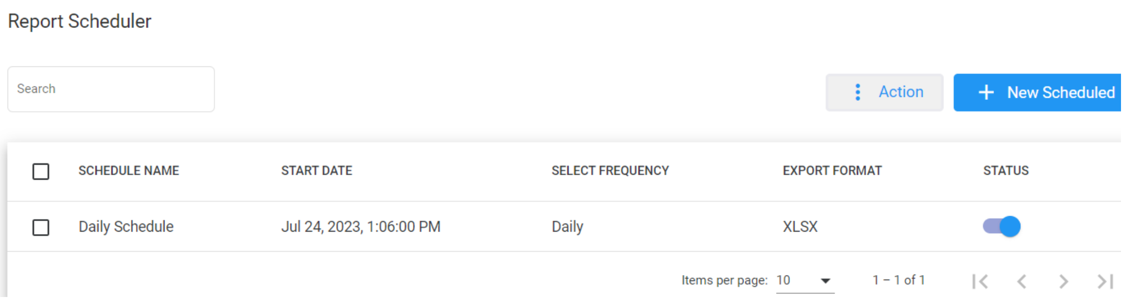
6. Click **Save Changes**.

Editing a Report Scheduler

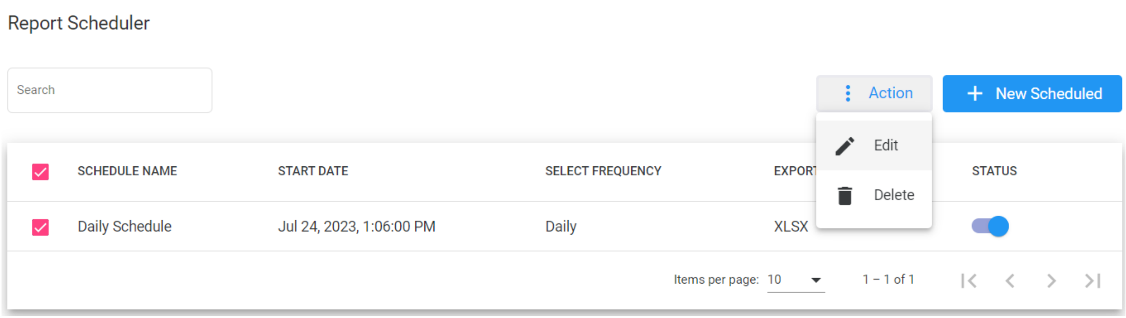
The procedure below describes how to edit a Report Scheduler.

➢ To edit a Report Scheduler:

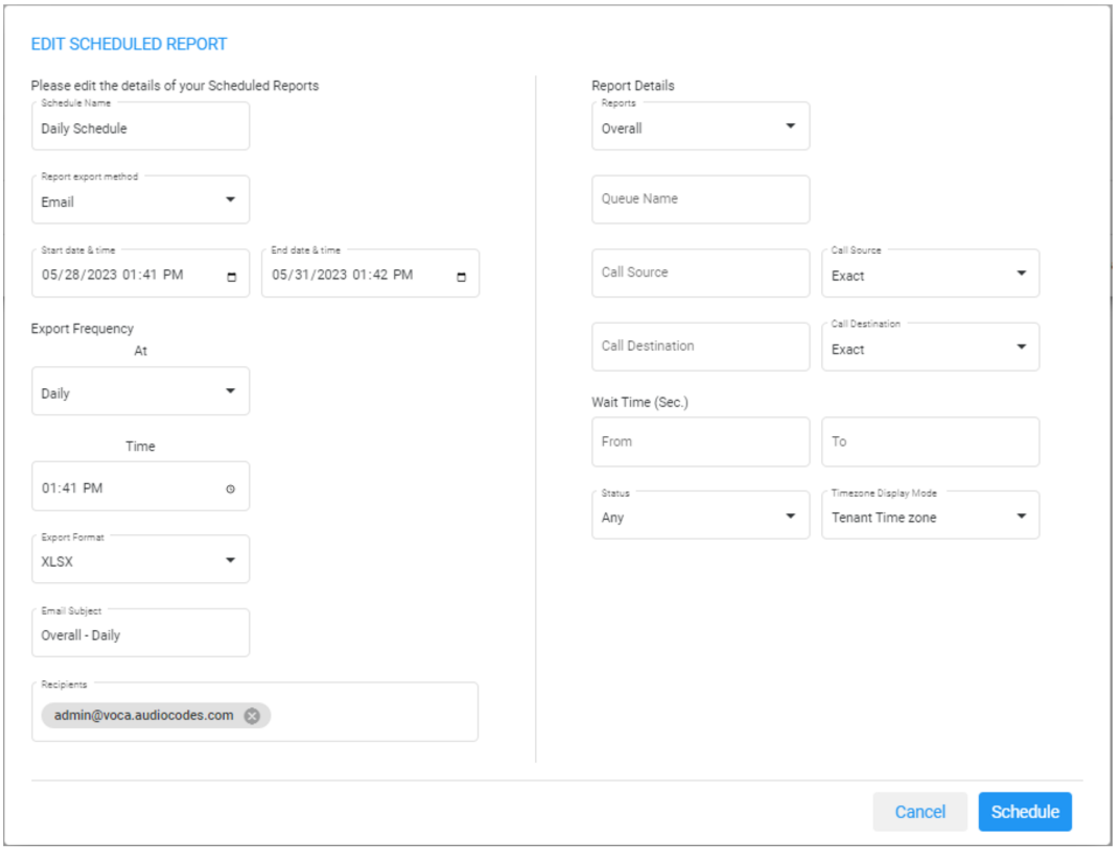
1. Open the Report Scheduler page (**Reports > Interaction Center Reports > Report Scheduler**); the following appears:



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



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



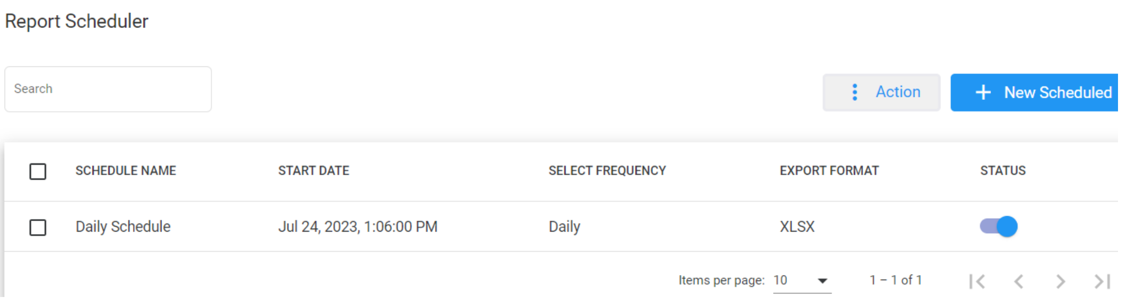
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

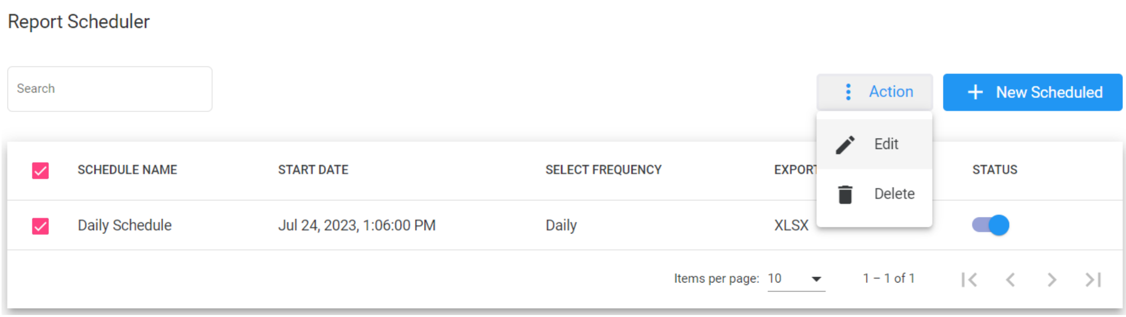
The procedure below describes how to delete a Report Scheduler.

➢ To delete a Report Scheduler:

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



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



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

Interaction Center Reports - Voice

You can generate the following Voice Interaction Center historical reports:

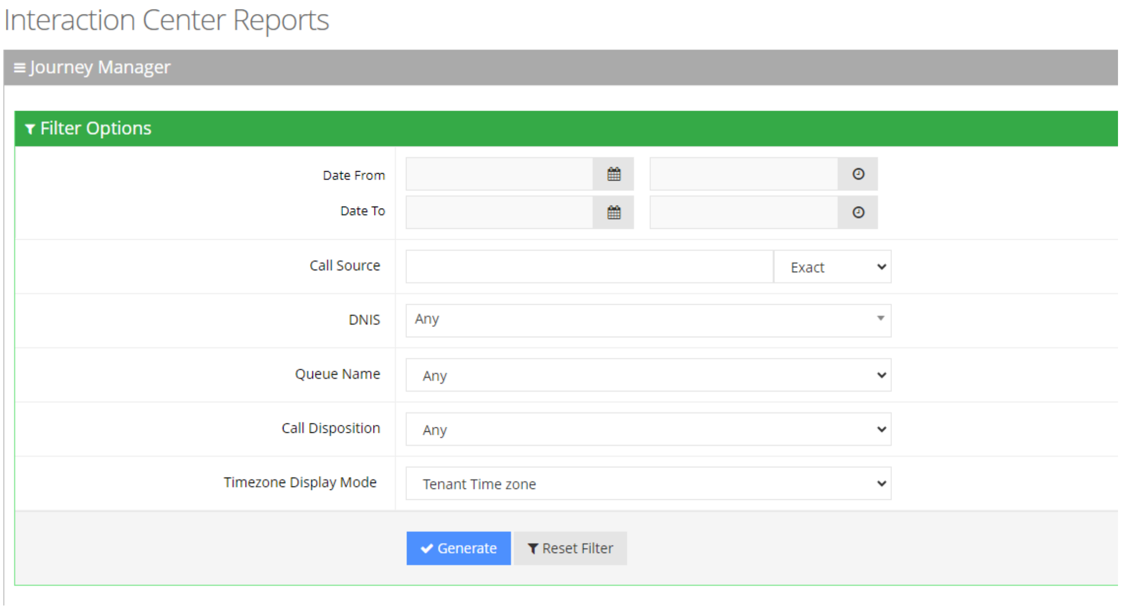
- Journey Manager
- Worker Activity Report
- Queue Activity Report
- Abandoned Call Detail Activity Report
- Worker Call Report
- Worker State Summary Report
- Worker Login-Logout Report
- Worker State Detail Report
- Callback Detail Report
- Callback Summary Report

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:**

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



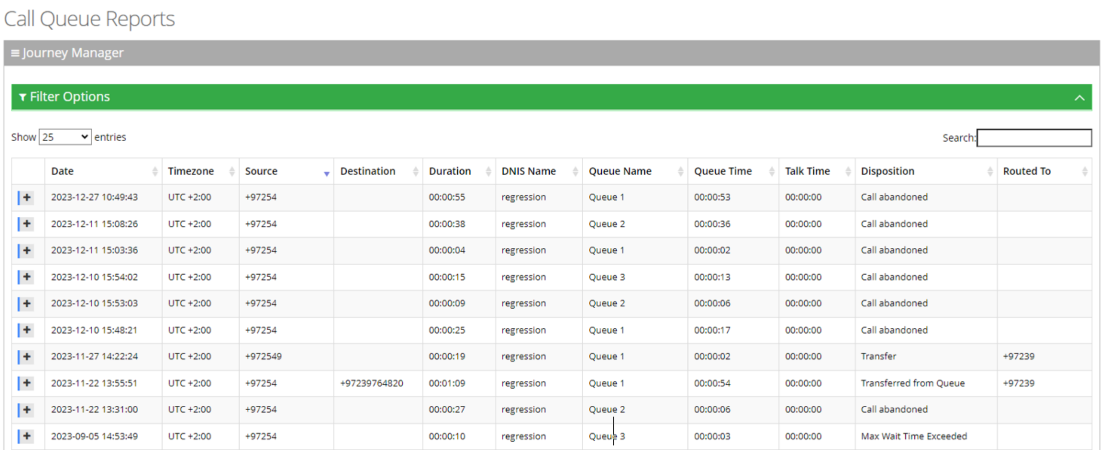
2. Select the appropriate filter fields to generate your report:

- **Date From:** Displays this report for a specific date/time range.
- **Date To:** Displays this report for a specific date/time range.
- **Call Source:** Displays information that is related to a specific source number.
- **DNIS:** Defines the internal phone number that is called to access Voca. You can select the appropriate value from the drop-down list.
- **Queue Name:** Defines a specific queue name or 'Any' to show statistics for all call queues.
- **Call Disposition:** Defines information that relates to calls that ended with a specific disposition or "Any'. For an explanation of the different call disposition, refer to Call Dispositions on page 278.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
  - **Tenant time zone:** Displays the information in this report based on the tenant configured time zone.
  - **Flow time zone:** Displays the information in this report based on the time zone configured under the Telephony Setting settings.
  - **Local time zone (Web):** Displays the information in this report based on the browser local time zone.

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

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

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


Call Queue Reports

≡ Journey Manager

Filter Options

Show 25 entries

Search:

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

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

2023-12-27 11:36:27	UTC +2:00	+972526403466	555111	00:03:19	N/A	Skill Based	00:00:00	00:00:00	Disconnect

Interaction Manager (Voice)

Time	Action	Description	Content	Result
11:36:10	Go to Menu	Default Speech Menu	-	-

Speech Menu (Default Speech Menu)

Queue (Skill Based)

Time	Action	Description	Content	Result
11:36:27	Overflow	All agents are offline	-	-
11:36:27	Play Prompt	Busy	-	-
11:36:32	Send SMS	-	-	Succeed
11:36:32	Transfer to Queue	Journey 2	Priority:	-

Queue (Journey 2)

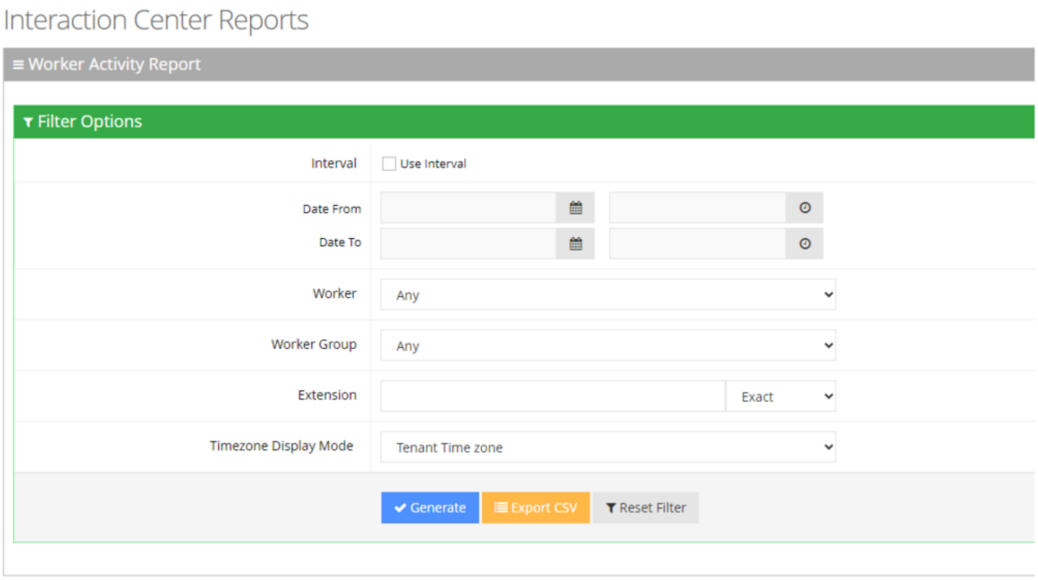
Time	Action	Description	Content	Result
11:36:33	Queue Info	Call Position: 1	Number of Available Workers: 0	-
11:39:28	Call Disposition	Call abandoned	-	-
11:39:28	Disconnect	-	-	-

Worker Activity Report

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

➢ To generate a Worker Activity report:

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



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

- **Last Month:** Displays data from the previous month, categorized by weeks.
- **Last Year:** Displays data from the last year, organized by months.

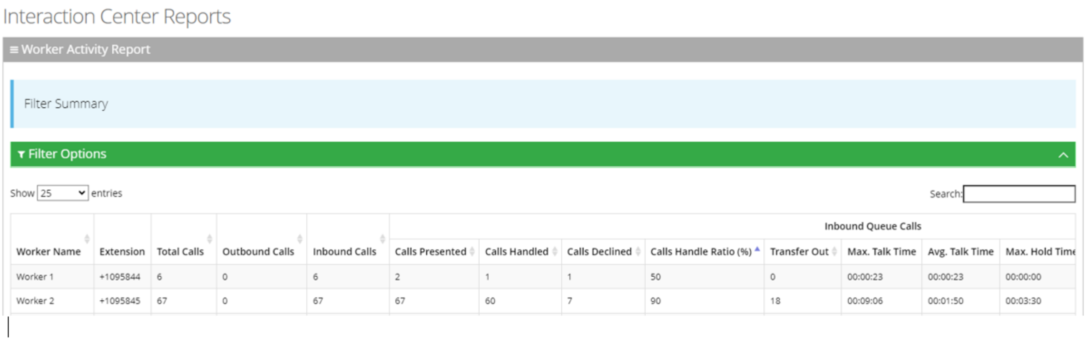
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Workers:** Defines information that is related to a specific worker.
- **Worker Group:** Defines information that is related to a specific worker group.
- **Extension:** Defines information that is related to a specific extension.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
  - **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
  - **Flow time zone:** Defines the information in this report based on the time zone configured under the **Telephony Setting** settings.
  - **Local time zone (Web):** Display the information in this report on the browser local time zone.

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

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

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

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



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

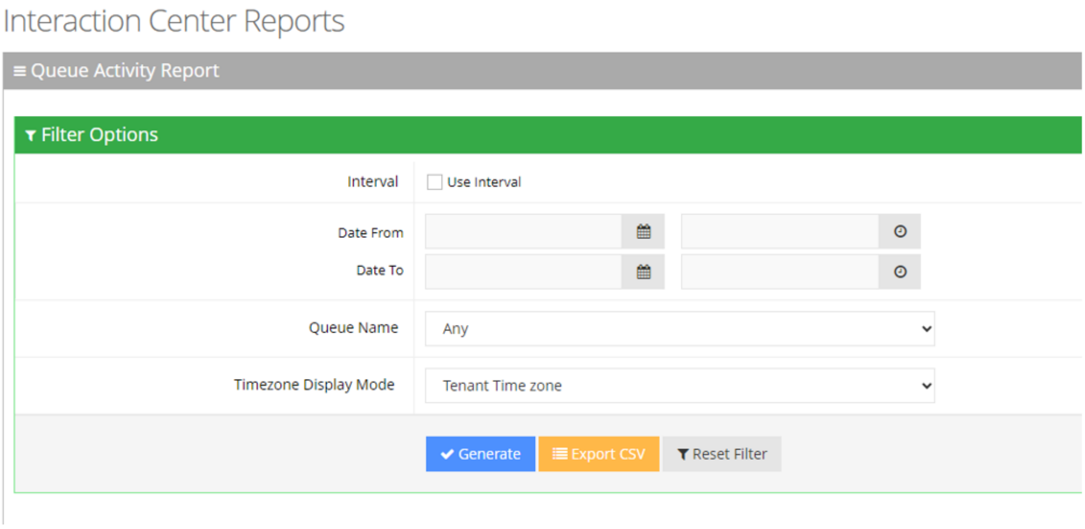
Queue Activity Report

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

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

➢ To generate a queue activity report:

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



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

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

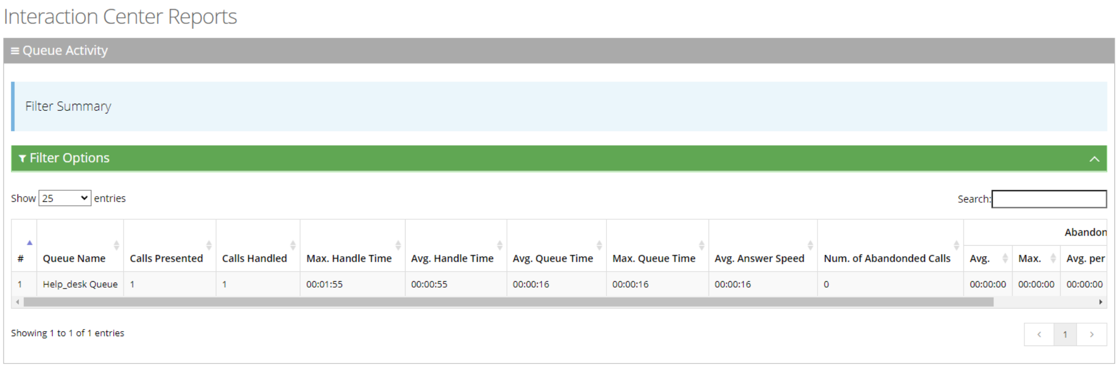
3. The following is a description of the report fields.

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

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

Field	Description
ing Time	agents are logged out.

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



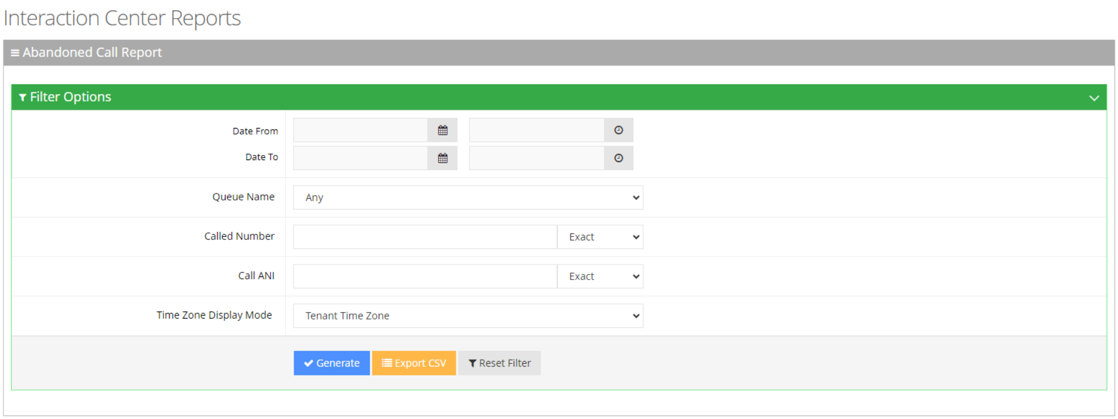
Abandoned Call Report

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

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

➢ To generate an Abandoned Call Report:

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



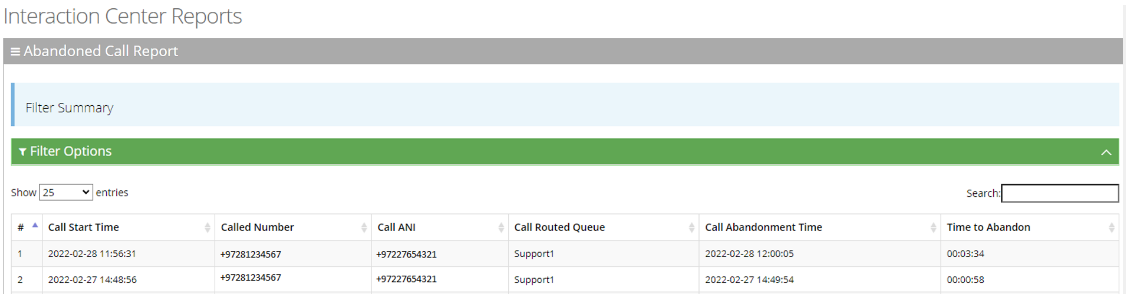
2. Select the appropriate filter fields:
   - **Date From:** Defines this report for a specific time range.
   - **Date To:** Defines this report for a specific time range.
   - **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
   - **Called Number:** Defines information that is related to a specific destination number.
   - **Called ANI:** Defines information that is related to a specific source number.

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

The following is a description of the report fields.

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

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

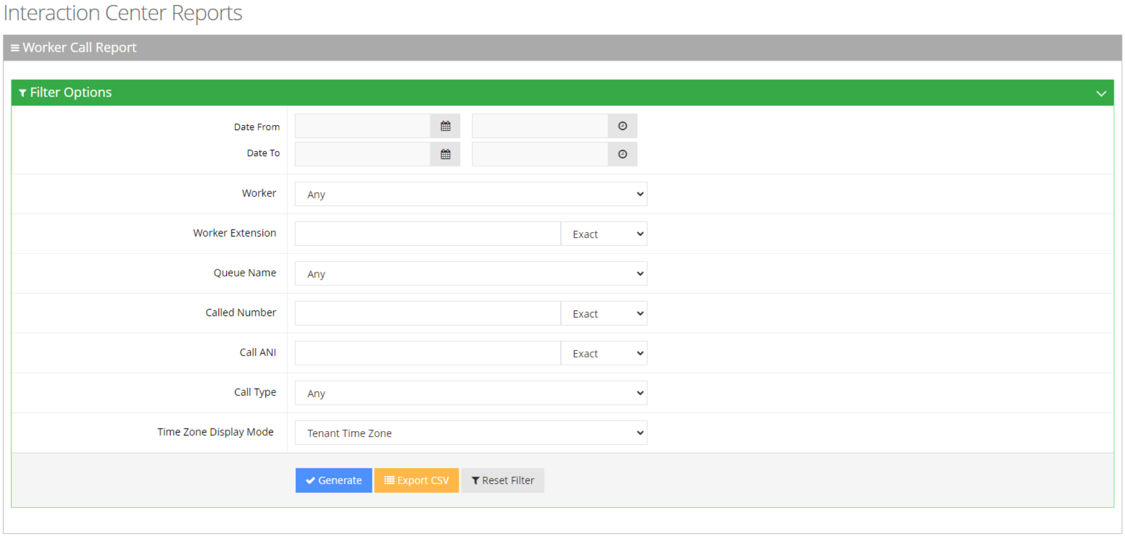


Worker Call Report

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

➢ To generate an Worker Call Report:

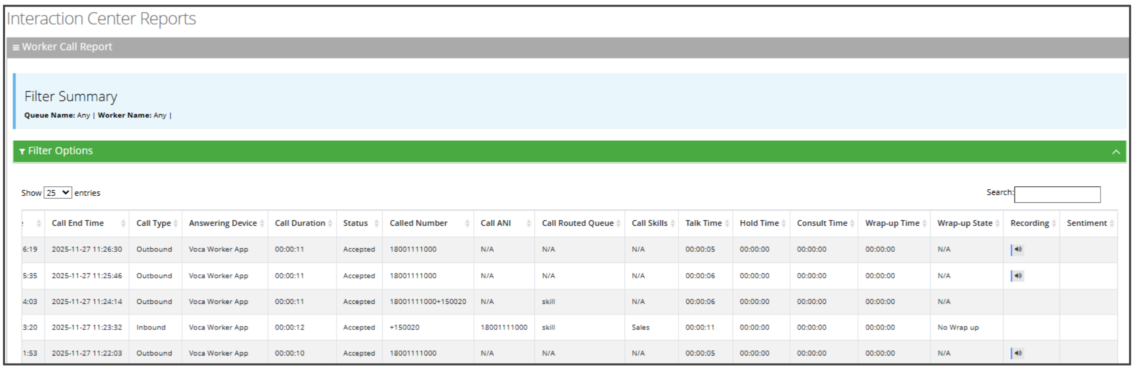
1. Open the Worker Call Report page (**Reports** > **Interaction Center Reports** > **Voice Reports** > **Worker Call Report**); the following appears:



2. Select the appropriate filter fields to generate your report:
   - **Date From:** Defines this report for a specific time range.
   - **Date To:** Defines this report for a specific time range.
   - **Workers:** Defines information that is related to a specific worker.
   - **Workers Extension:** Defines information that is related to a specific extension.
   - **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics for all call queues.
   - **Called Number:** Defines information that is related to a specific destination number.
   - **Call ANI:** Defines information that is related to a specific source number.
   - **Call Type:** Defines information that is related to a specific call type:
     - **Any:** Defines the information that is related to inbound and outbound calls.
     - **Inbound:** Defines the information that is related to all the inbound calls.
     - **Outbound:** Defines the information that is related to all the outbound calls.
   - **Timezone Display Mode:** Display this report in different time zone. The time zone of calls can be one of the following options:
     - **Tenant time zone:** Display the information in this report based on the tenant configured time zone.
     - **Flow time zone:** Display the information in this report based on the time zone configured under the Telephony Setting settings.
     - **Local time zone (Web):** Display the information in this report on the browser local time zone.
3. The following is a description of the report fields.

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

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

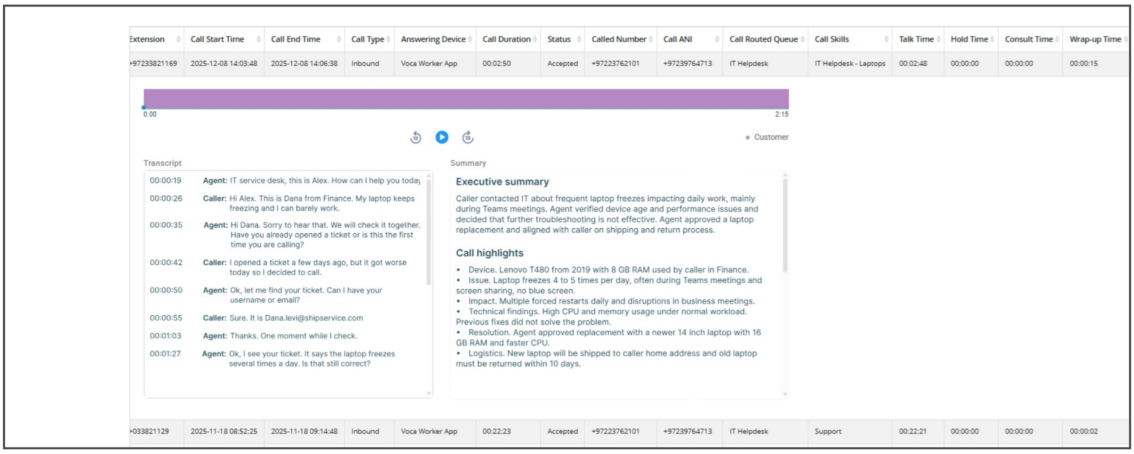


5. Listen to call recordings with playback controls that allow you to forward or rewind by 10 seconds for easy navigation. Select the call you want to review, and click the Recording icon.

   If you have the Agent Insight Add-On, the transcript and summary is displayed below the recording. Sentiment can be positive, negative, neutral, or a combination (e.g., Neutral_ Negative) if the tone shifted during the call.

   The sentiment analysis shows 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 if the agent or customer grew frustrated.

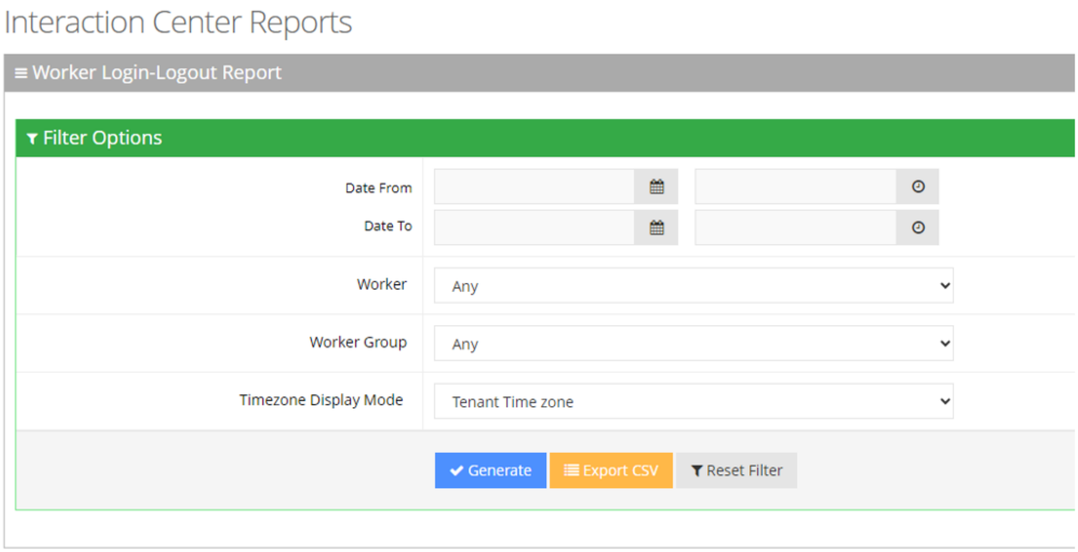


Worker Login-Logout Report

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:



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

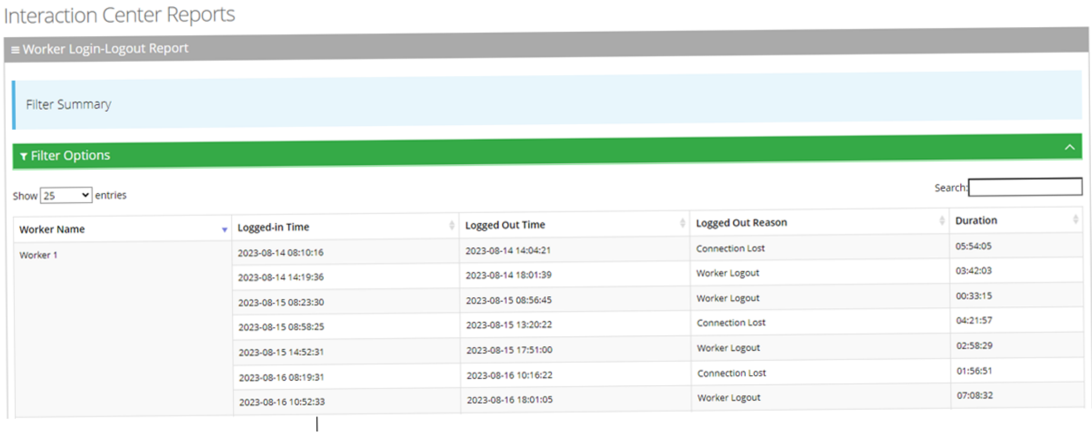
- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.
- **Worker:** Defines information that is related to a specific worker.
- **Worker Group:** Defines information that is related to a specific worker group.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
    - **Tenant time zone:** Defines the information in this report based on the tenant configured time zone.
    - **Flow time zone:** Defines the information in this report based on the time zone configured under the Telephony Setting settings.
    - **Local time zone (Web):** Defines the information in this report on the browser local time zone.

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

Report Column	Description
Worker Name	Defines the name of the worker.
Logged-In Time	Defines the date and hour of the login.
Logged-Out Time	Defines the date and hour of the logout.
Logged-Out Reason	Defines the cause of the logout: 1. Supervisor Logout: When the supervisor logs out the worker. 2. Connection Lost: Indicating network issues.

Report Column	Description
	3. Worker Logout: Worker-initiated logout from the Worker Application.
Duration	Defines the elapsed time between the login and logout time.

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

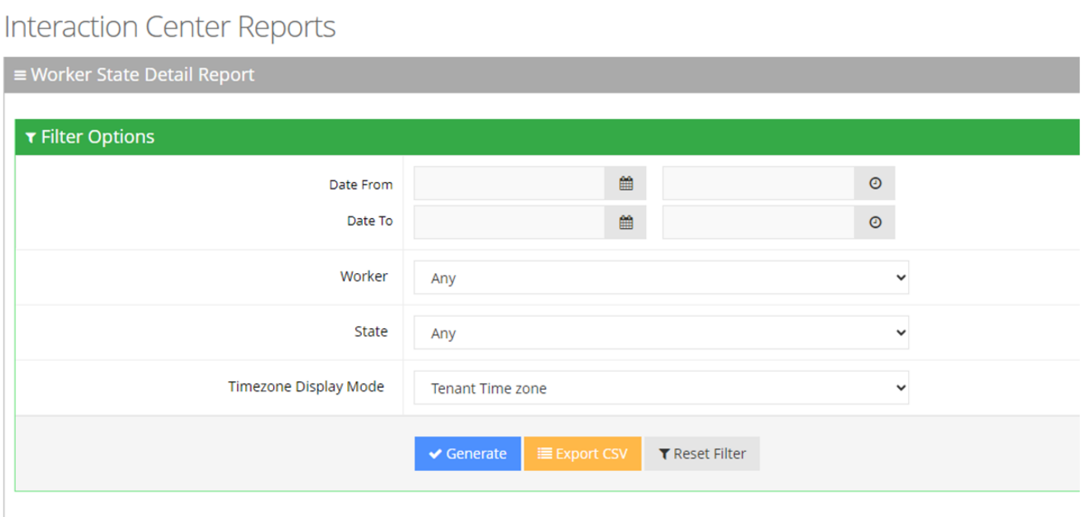


Worker State Detail Report

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

➢ To generate a Worker State Detail Report:

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



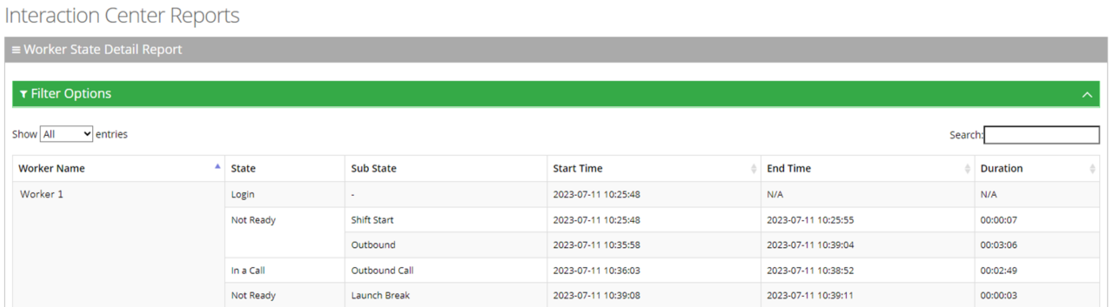
2. Select the appropriate filter fields to generate your report:

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

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

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

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



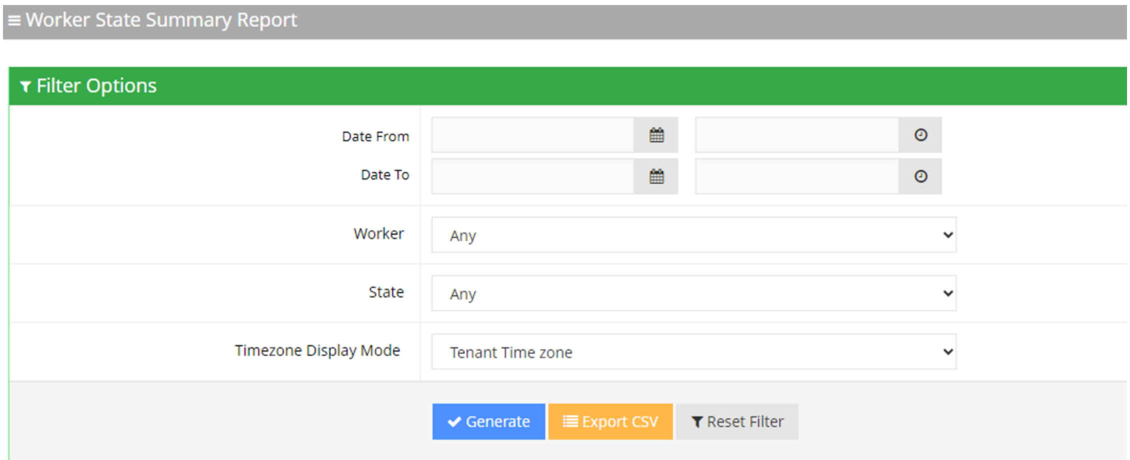
Worker Name	State	Sub State	Start Time	End Time	Duration
Worker 1	Login	-	2023-07-11 10:25:48	N/A	N/A
	Not Ready	Shift Start	2023-07-11 10:25:48	2023-07-11 10:25:55	00:00:07
		Outbound	2023-07-11 10:35:58	2023-07-11 10:39:04	00:03:06
	In a Call	Outbound Call	2023-07-11 10:36:03	2023-07-11 10:38:52	00:02:49
	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:



2. Select the appropriate filter fields to generate your report:
   - **Date From:** Defines this report for a specific time range.
   - **Date To:** Defines this report for a specific time range.
   - **Worker:** Defines information that is related to a specific worker.
   - **State:** Defines information that is related to a specific worker state or “Any’. The worker state can be any of the following values:
     - **Any:** Defines the information that relates to all states.
     - **Logged-in:** Defines the information that is related only to the login time.
     - **Ready:** Defines the information that is related only to the ready time.
     - **Not Ready:** Defines the information that is related only to the not ready time.
     - **In a Call:** Defines the information that is related only to the talking time.

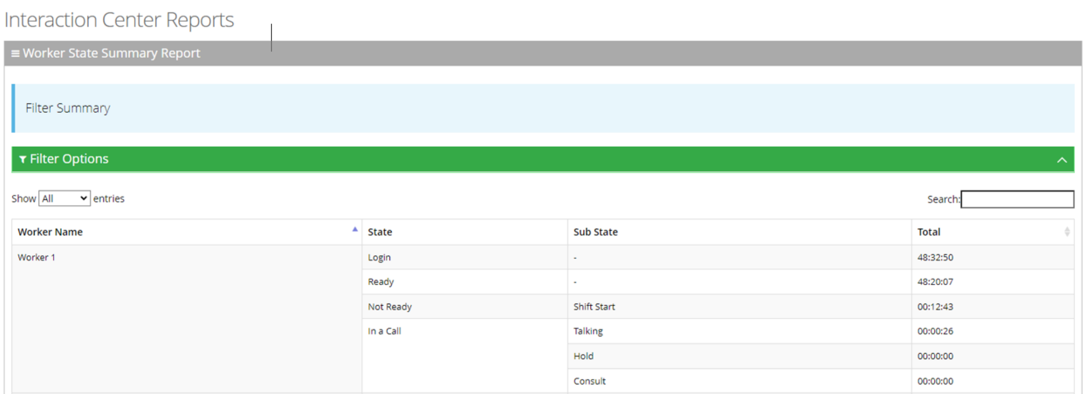
    - **Wrap-up:** Defines the information that is related only to the wrap-up time.

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

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

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

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

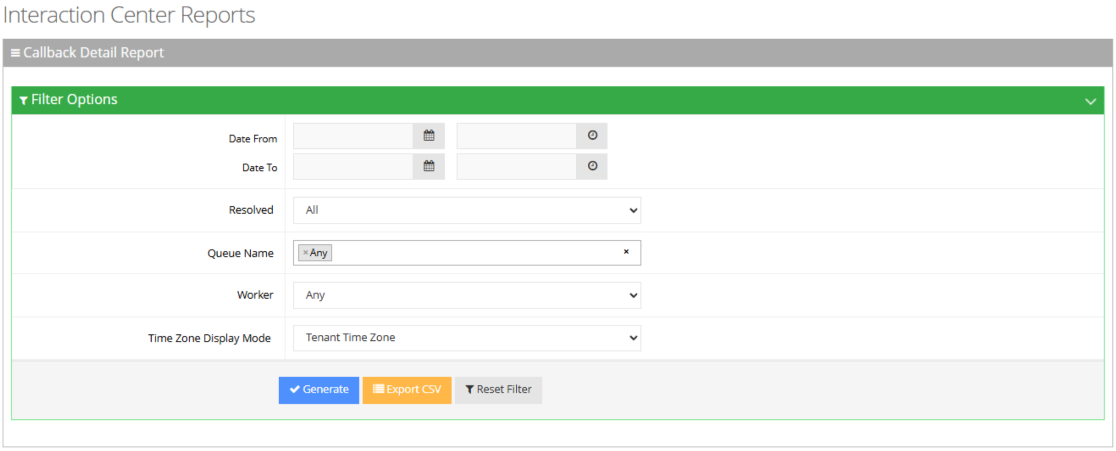


Callback Detail Report

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** > **Interaction Center Reports** > **Voice Reports** > **Callback Detail Report**); the following appears:



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

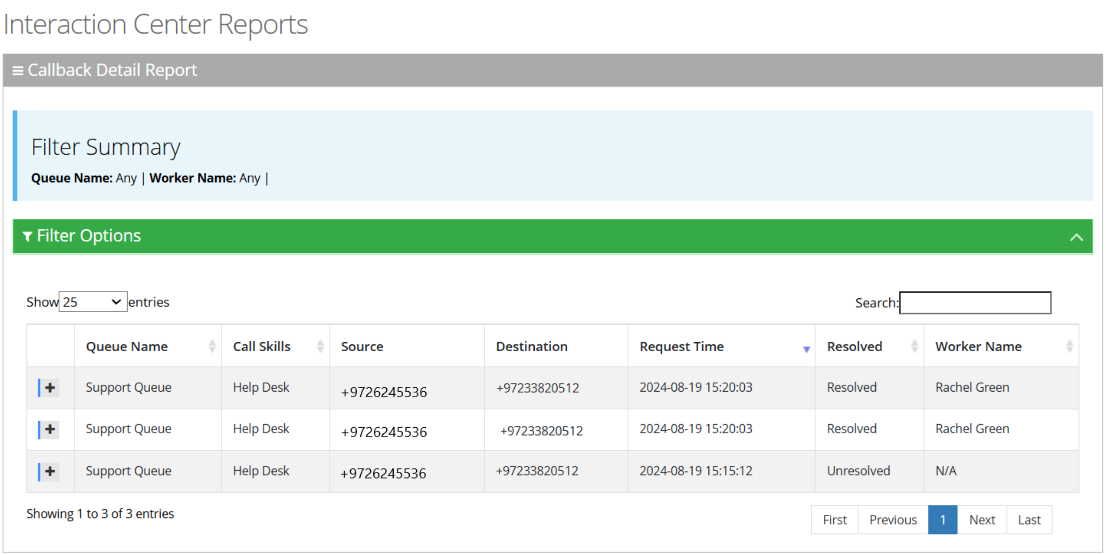
- **Date From:** Defines this report for a specific time range.
- **Date To:** Defines this report for a specific time range.
- **Resolved**: Number of times callers engaged with a Worker via Callback
- **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics 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.

Report Column	Description
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 "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.

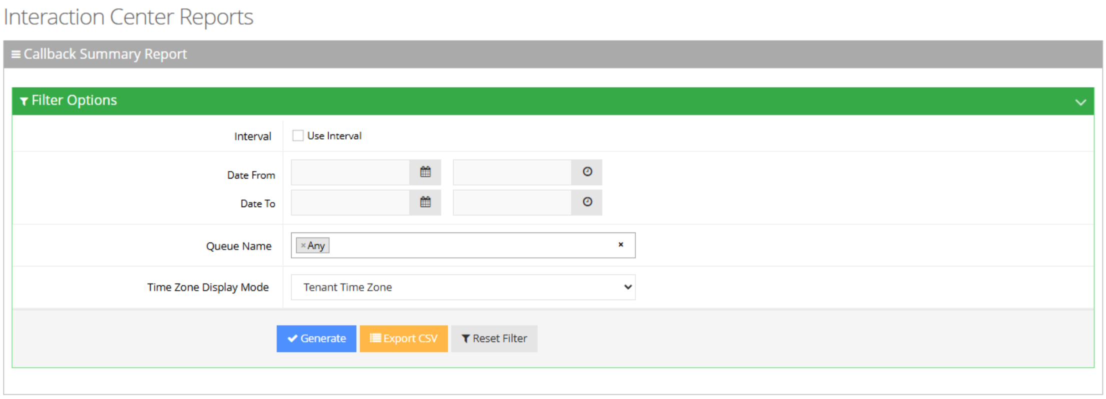


Callback Summary Report

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:

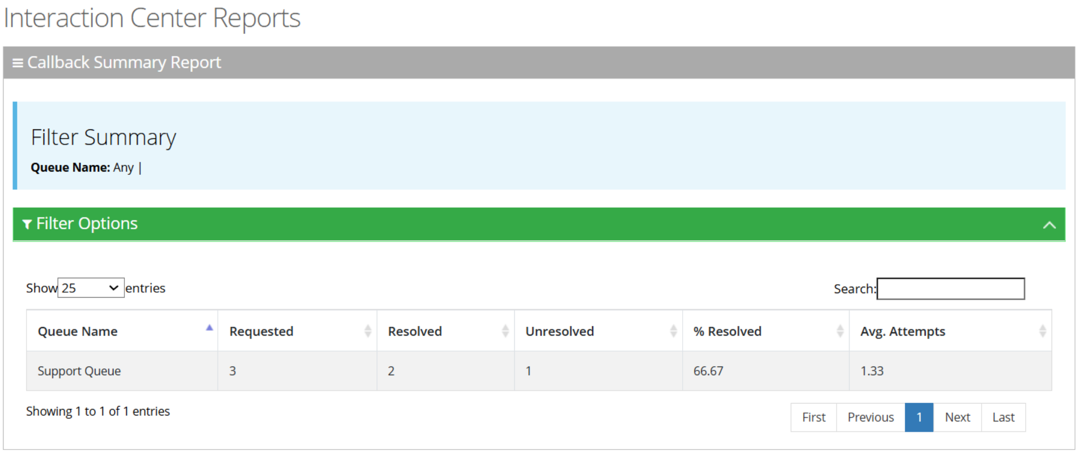


2. Select the appropriate filter fields to generate your report:
   - **Date From:** Defines this report for a specific time range.
   - **Date To:** Defines this report for a specific time range.
   - **Queue Name:** Defines information that is related to a specific queue name or 'Any' to show statistics 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

Report Column	Description
% 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 - Email

You can generate the following Email Interaction Center historical reports:

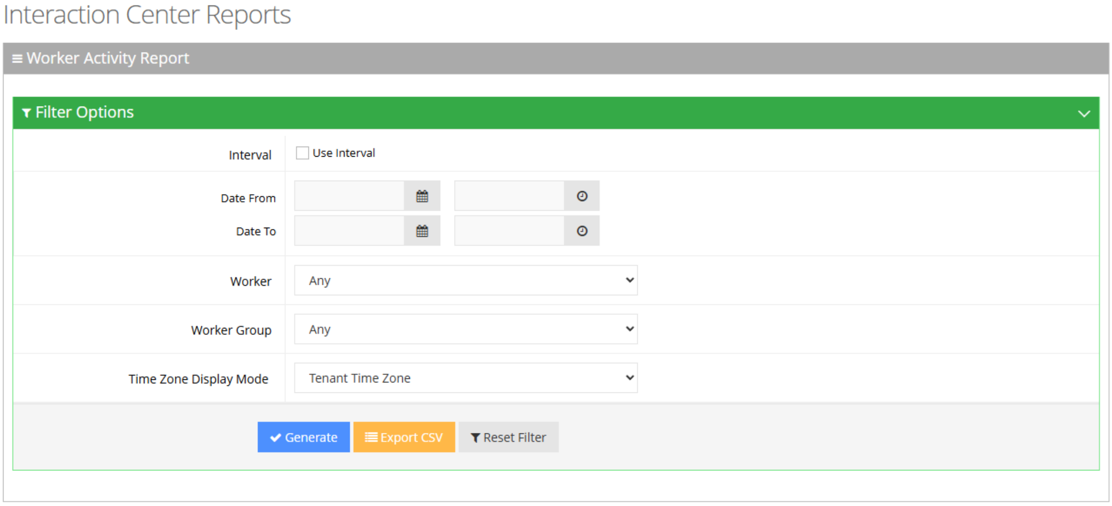
- Worker Activity Report
- Queue Activity Report
- Worker Report

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:



2. Select the appropriate filter fields:

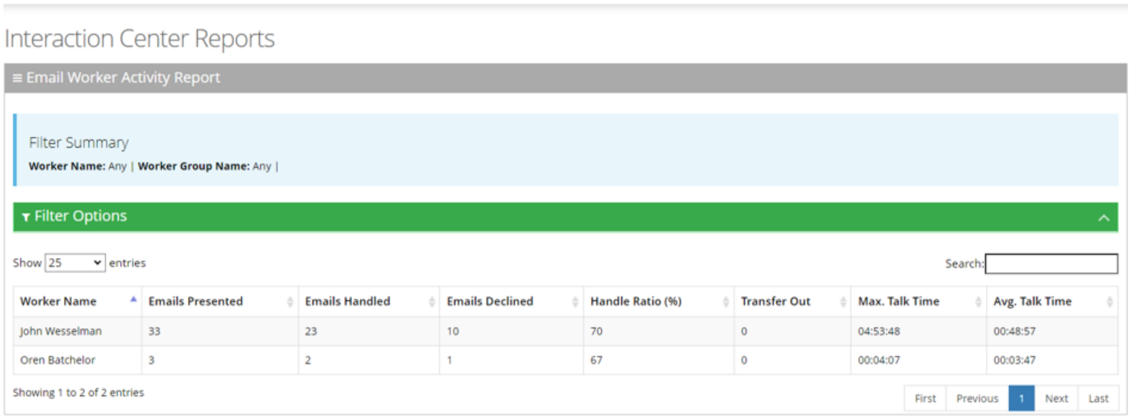
- **Interval:** Defines how the report's date intervals are segmented. Select the check box to view a drop-down list of predefined time periods, based on the customer's end date ("Date To"):
    - **Last Day:** Displays data from the past day, segmented by hours.
    - **Last Week:** Displays data from 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.

Field	Description
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 Interaction Time	Defines the longest interacting time of any email that the Worker 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.

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



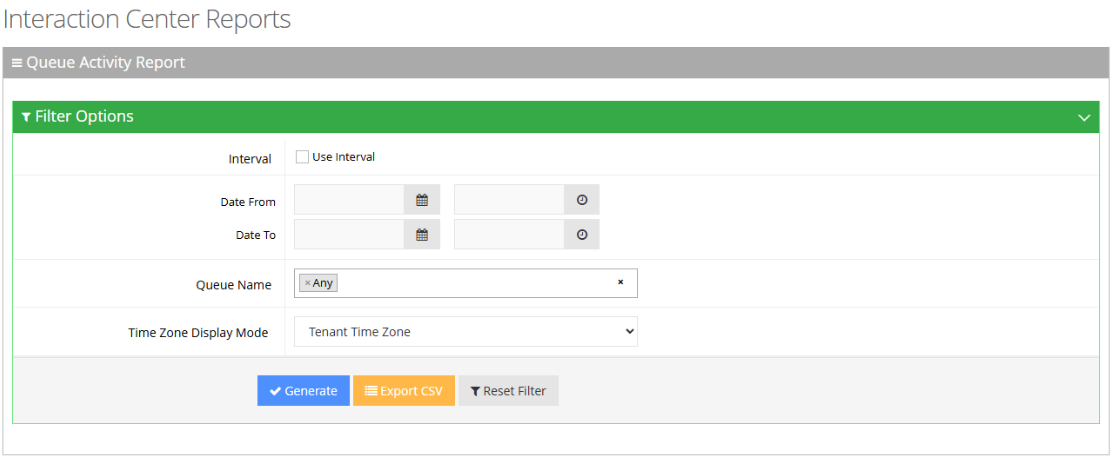
Queue Activity Report

The Queue Activity Report displays summarized information of 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:

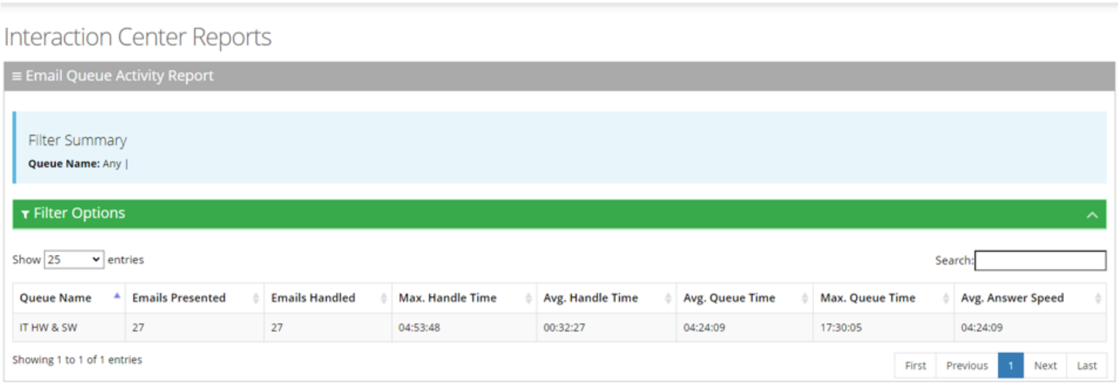
1. Open the Queue Activity Report page (**Reports** > **Interaction Center Reports** > **Email Reports** > **Queue Activity Report**); the following appears:



2. Select the appropriate filter fields to generate your report:
   - **Interval:** Defines how the report's date intervals are segmented. Select the check box to reveal a drop-down list of predefined time periods, based on the customer's end date ("Date To"):
     - **Last Day:** Displays data from the past day, segmented by hours.
     - **Last Week:** Shows data from the previous week, separated by days.
     - **Last Month:** Presents data from the previous month, categorized by weeks.
     - **Last Year:** Displays data from the last year, organized by months.
   - **Date From:** Defines 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 Time	Defines the longest queue time of any one email that was routed to the 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.

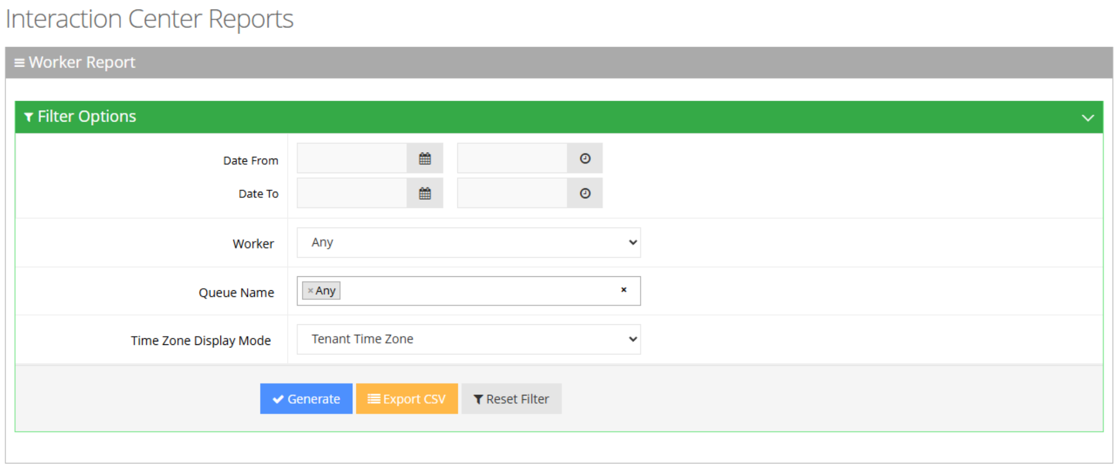


Worker Report

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:



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

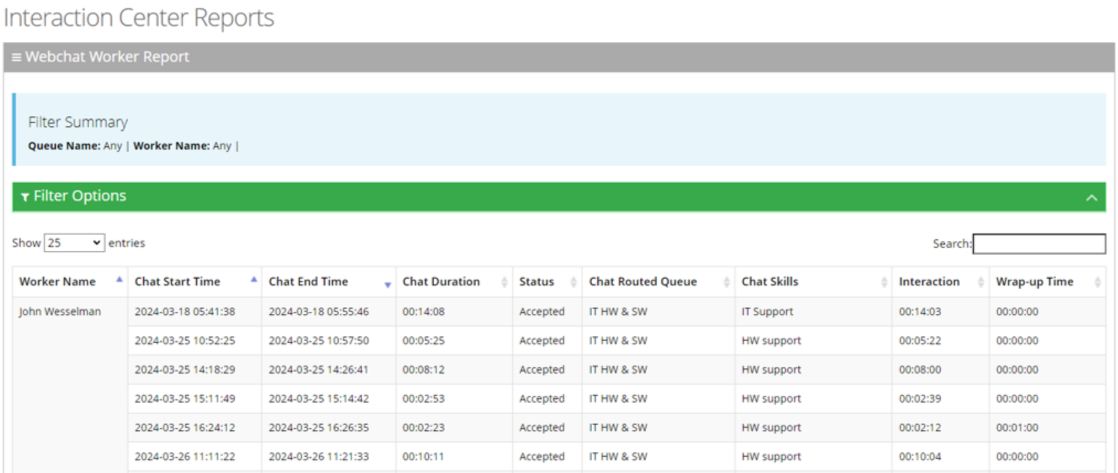
   - **Date From:** Defines the report for a specific time range.
   - **Date To:** Defines the report for a specific time range.
   - **Worker:** Defines information related to a specific worker.
   - **Queue Name:** Defines information related to a specific queue name or 'Any' to show statistics for all 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.

Report Column	Description
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.



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:

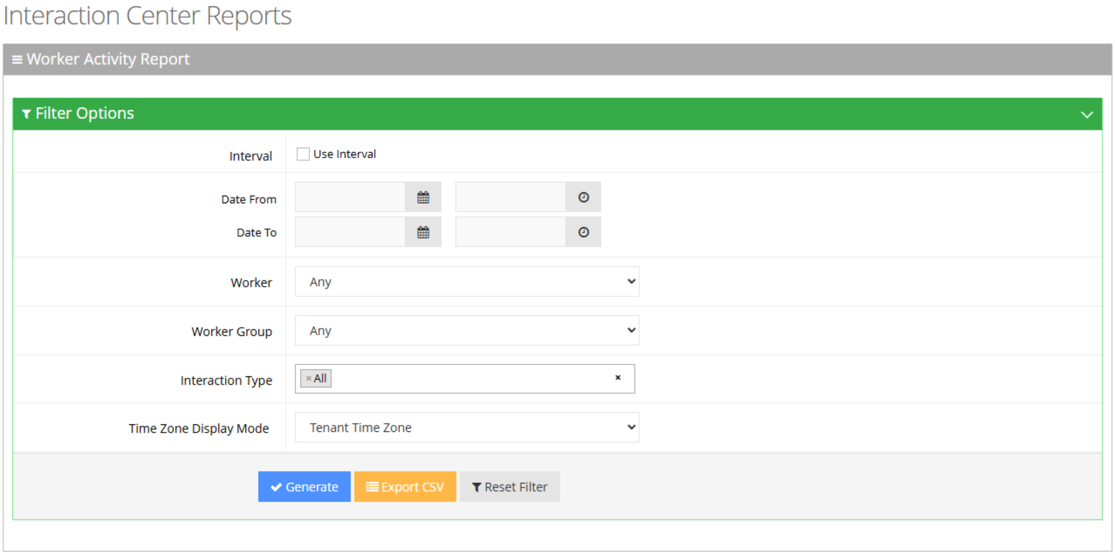
- Worker Activity Report
- Queue Activity Report
- Worker Report

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:



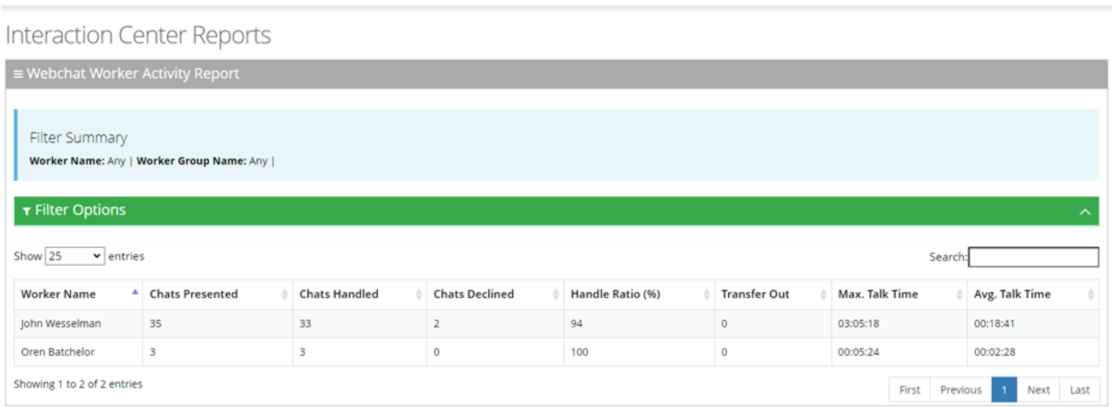
2. Select the appropriate filter fields:

   - **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 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.



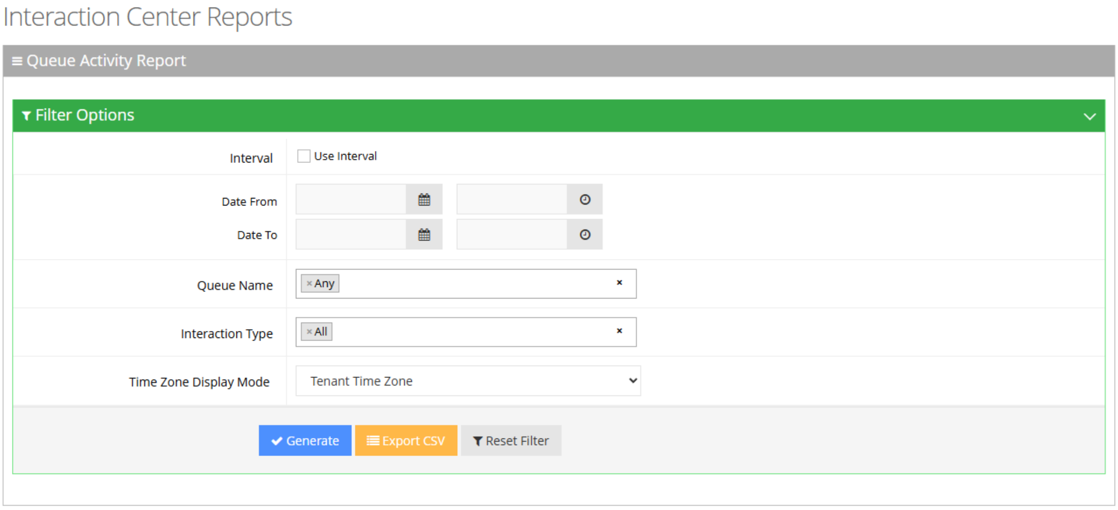
Queue Activity Report

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:



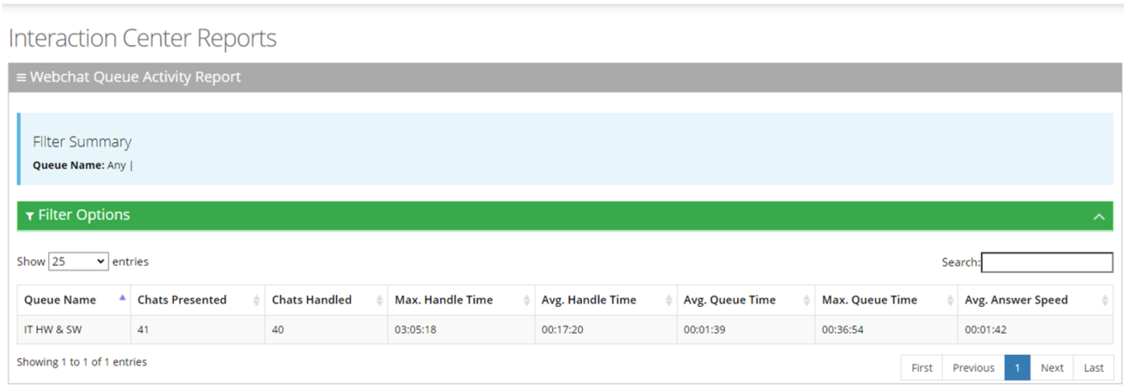
2. Select the appropriate filter fields to generate your report:

   - **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.
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.

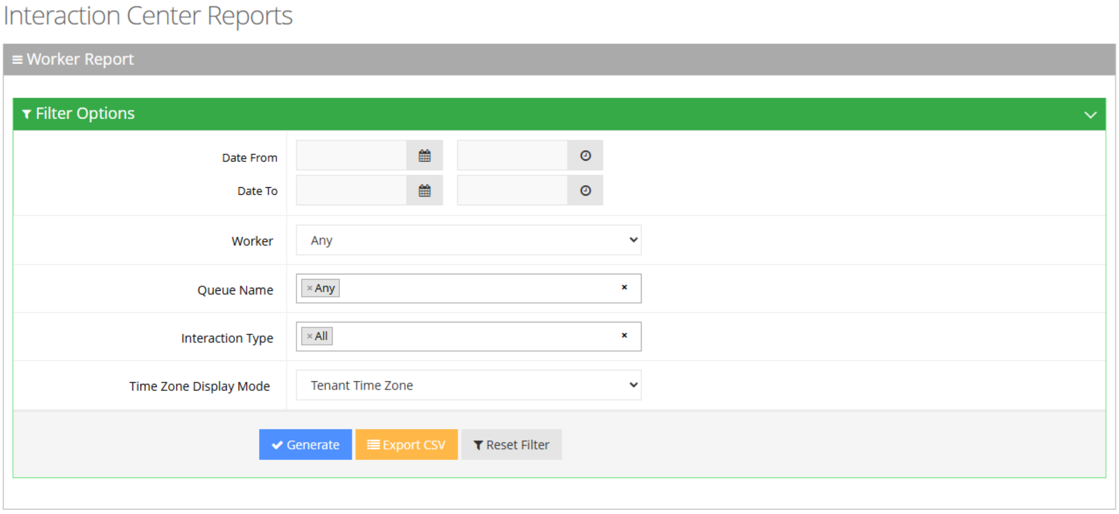


Worker Report

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:

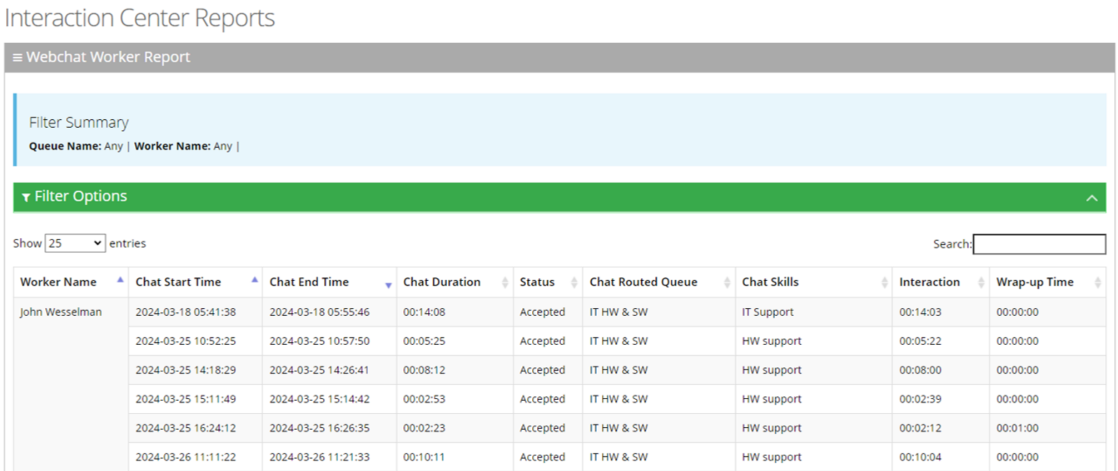


2. Select the appropriate filter fields to generate your report:
   - **Date From:** Defines this report for a specific time range.
   - **Date To:** Defines this report for a specific time range.
   - **Worker:** Defines information that is related to a specific worker.
   - **Queue Name:** Defines 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.

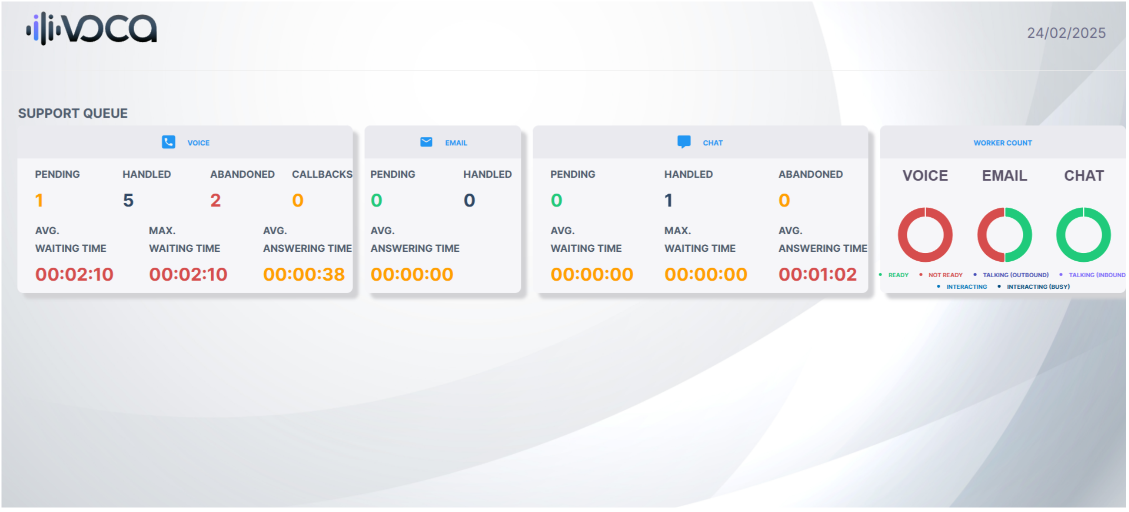
4. Click **Generate** to generate the report; click **Export CSV** to export the report in CSV format.



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.



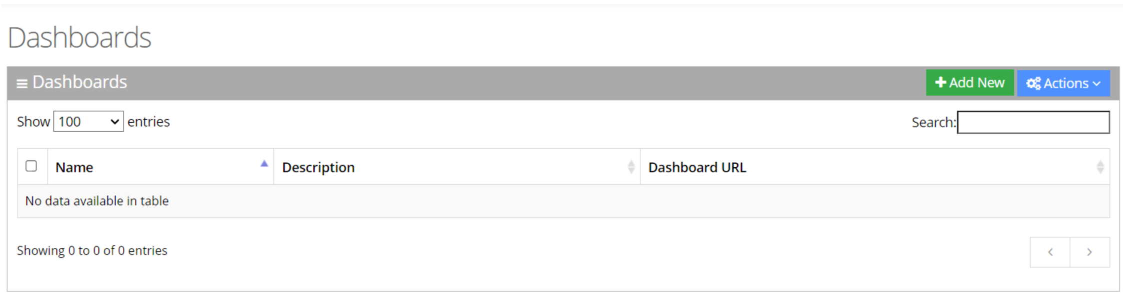
Adding a Real-Time Dashboard

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 127.

➢ To add a new real-time dashboard:

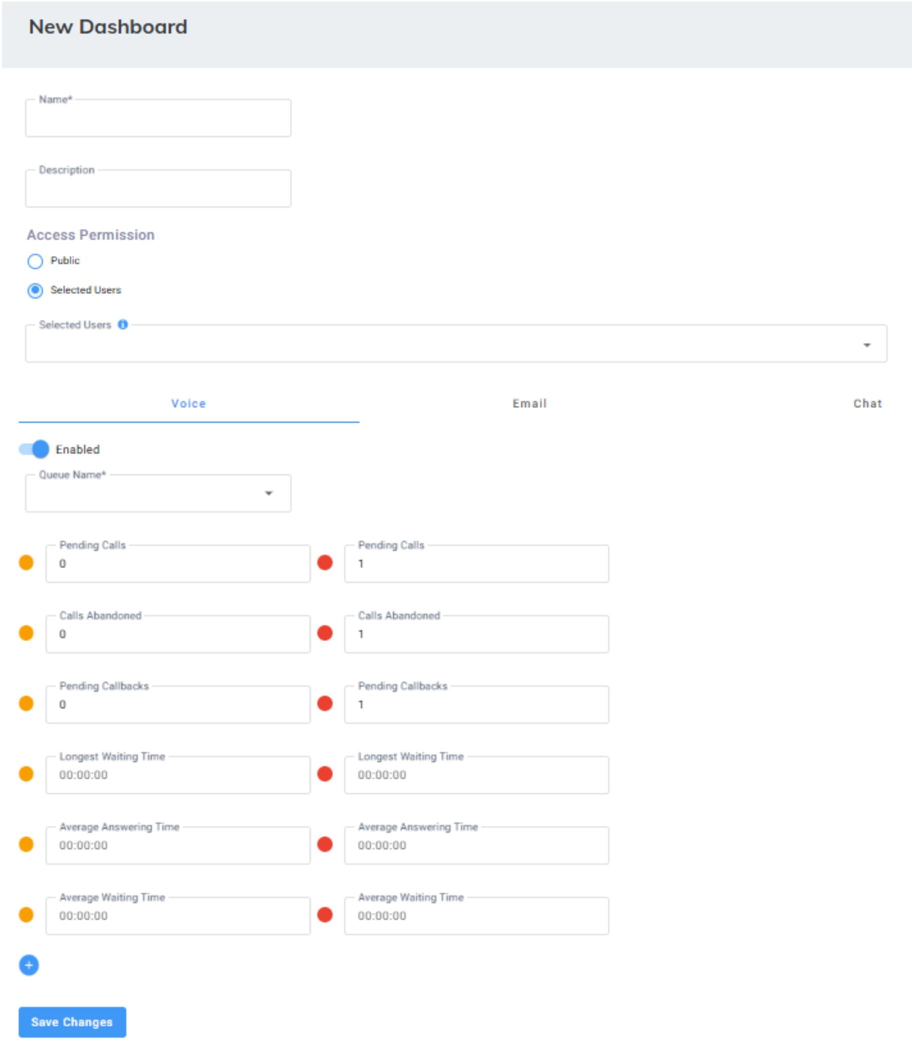
1. Open the Dashboards page (**Reports** > **Interaction Center Reports** > **Real-time Dashboard**); the following appears:



   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.

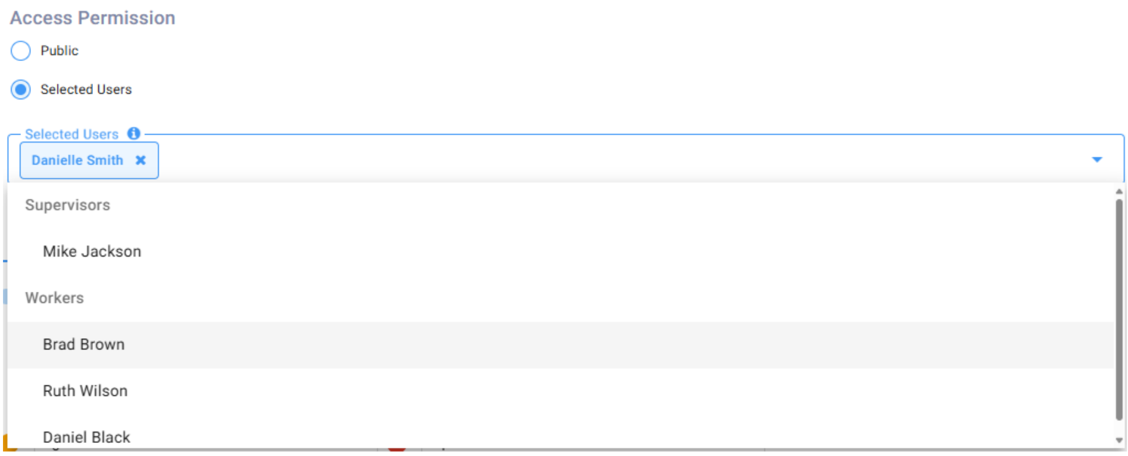
2. Click **Add New**; the following appears:



Additional queues can be added to the dashboard by clicking 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.

3. Enter a name and description for the new dashboard.
4. Choose who can access the real-time dashboard:
   - **Public**: Select this option to make the dashboard accessible to everyone.
   - **Selected Users**: Select this option to grant dashboard access only to specific users. If you select this option, choose users from the drop-down list to grant them access.



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

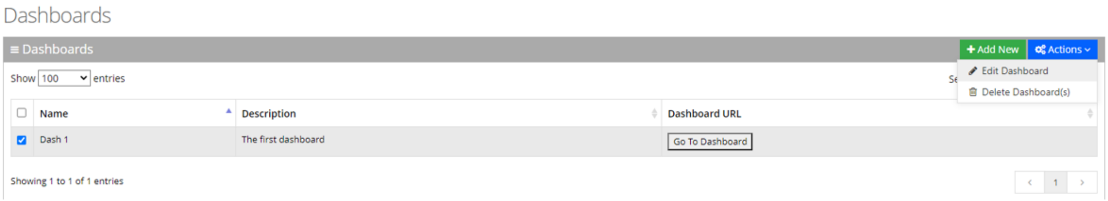
The procedure below describes how to edit a real-time dashboard.

➢ **To edit a real-time dashboard:**

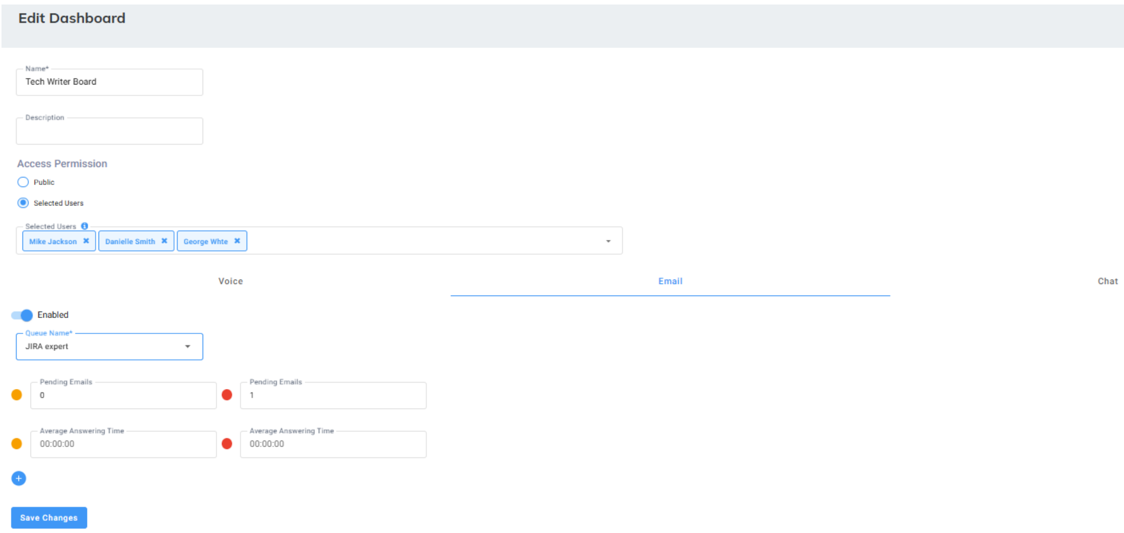
1. Open the Dashboards page (**Reports** > **Interaction Center Reports** > **Real-time Dashboard**); the following appears:

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:



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

Deleting a Real-Time Dashboard

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

➢ To delete a real-time dashboard:

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

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

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

IVR Reports

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

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

Report Scheduler

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

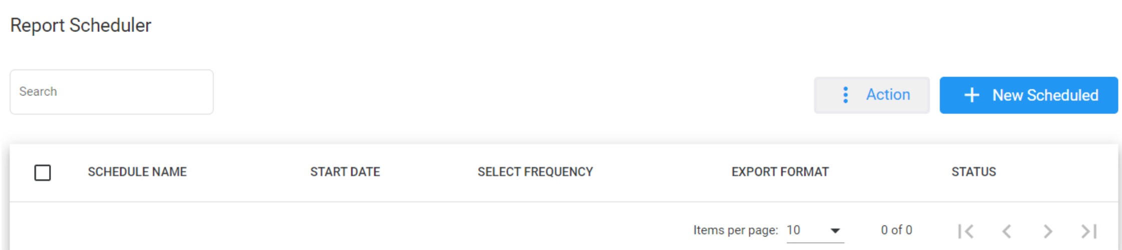
The Report Scheduler functionality is only applicable if Voca is integrated with an email Server. For more information, click here.

Adding a Report Scheduler

The procedure below describes hot to add a Report Scheduler.

➢ To add a new Report Scheduler:

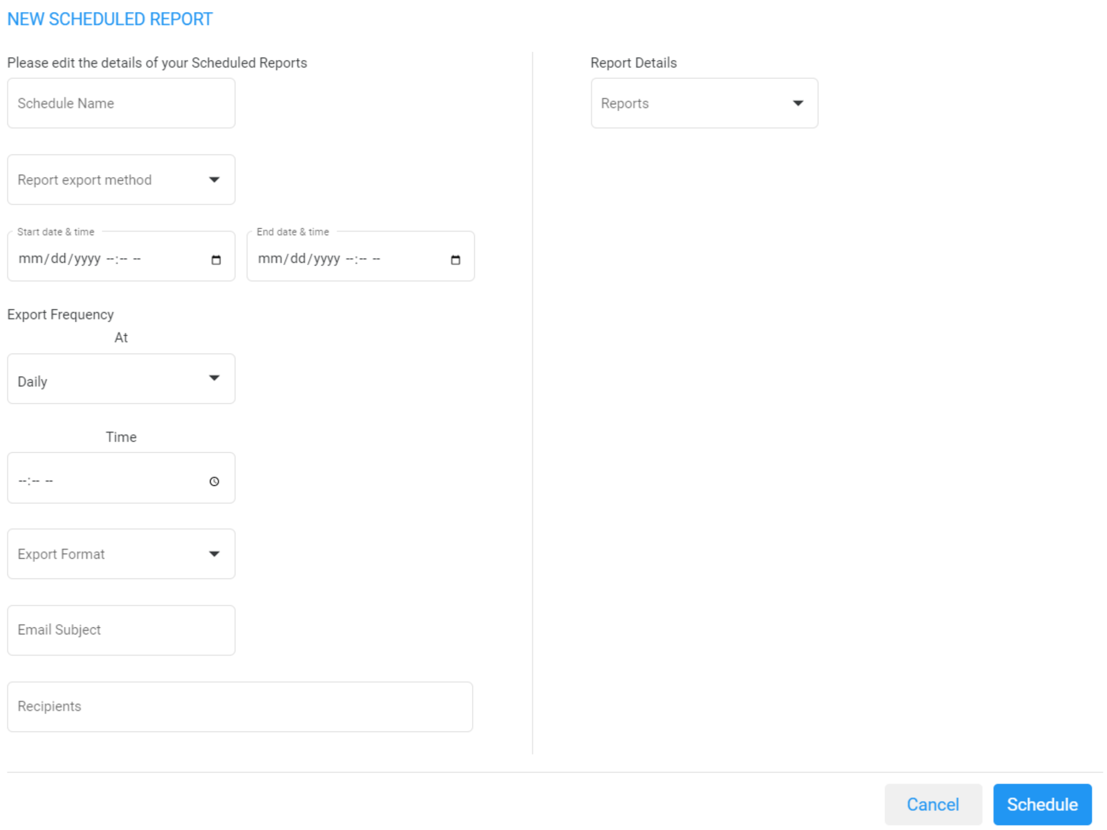
1. Open the Report Scheduler page (**Reports** > **IVR Reports** > **Report Scheduler**); the following appears:



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

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

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



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

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

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.

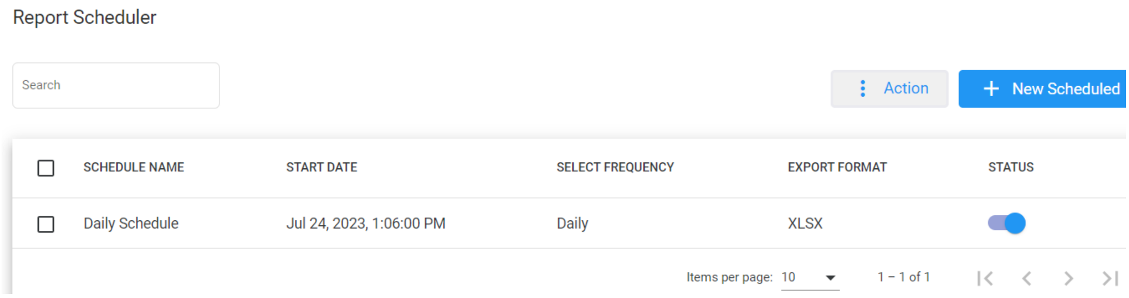
6. Click **Save Changes**.

Editing a Report Scheduler

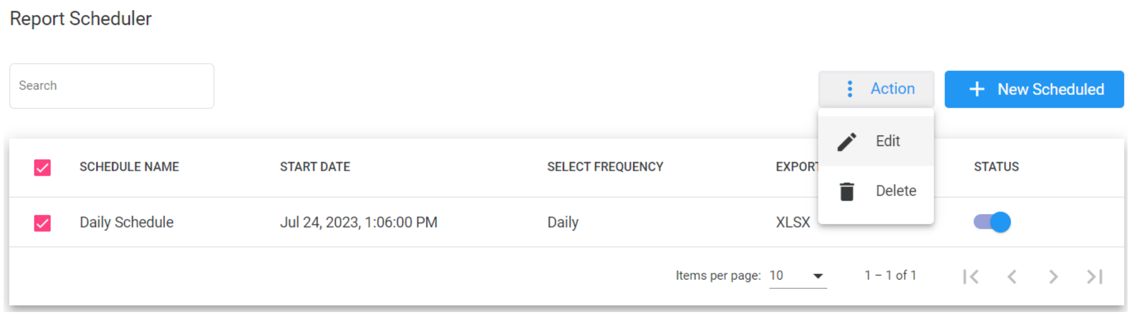
The procedure below describes how to edit a Report Scheduler.

➢ To edit a Report Scheduler:

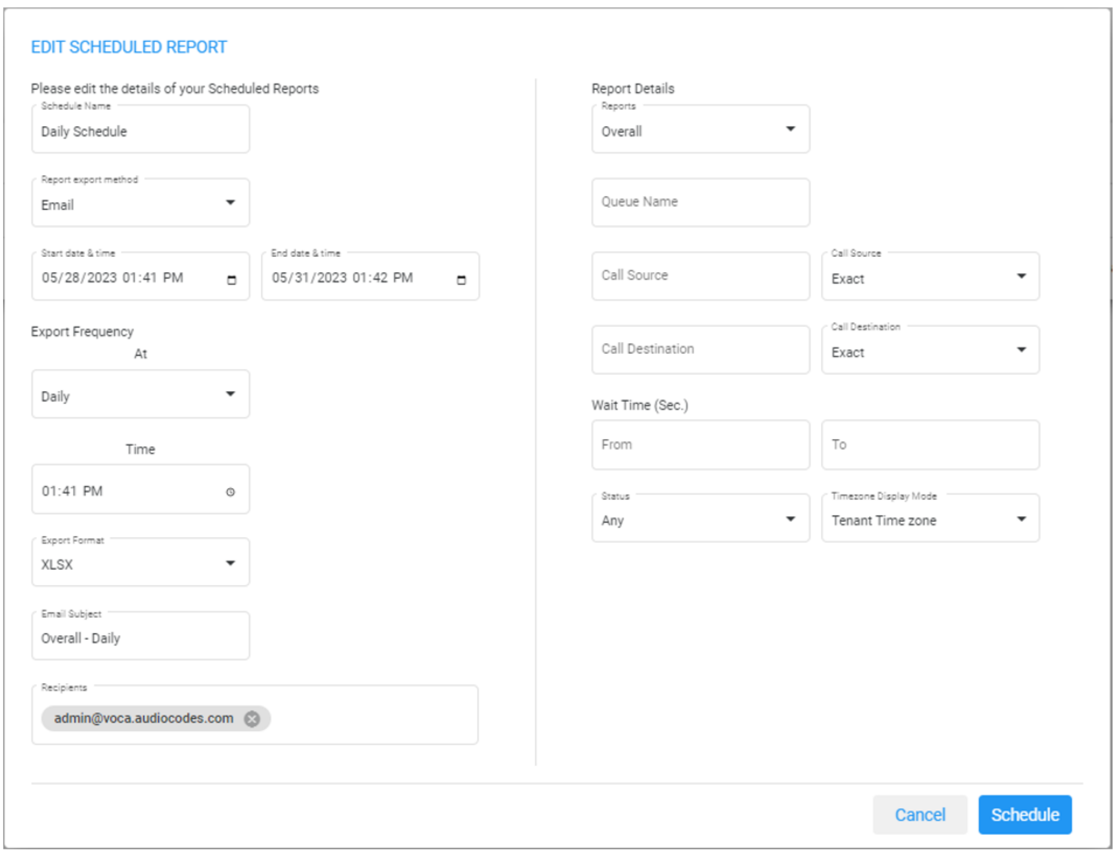
1. Open the Report Scheduler page (**Reports > IVR Reports > Report Scheduler**); the following appears:



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:



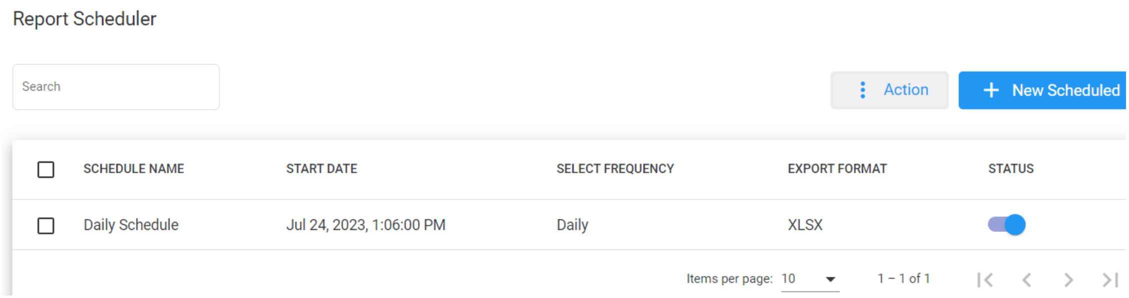
4. Make your changes on the Edit Schedule Report page, and then click **Schedule**.

Deleting a Report Scheduler

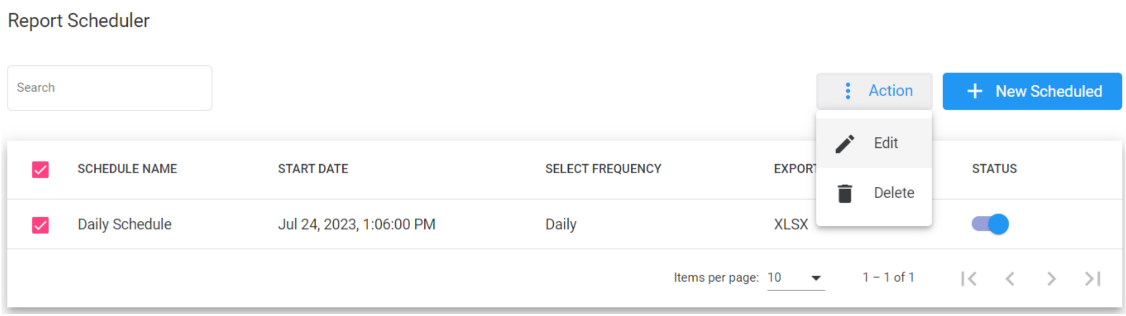
The procedure below describes how to delete a Report Scheduler.

➢ 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.



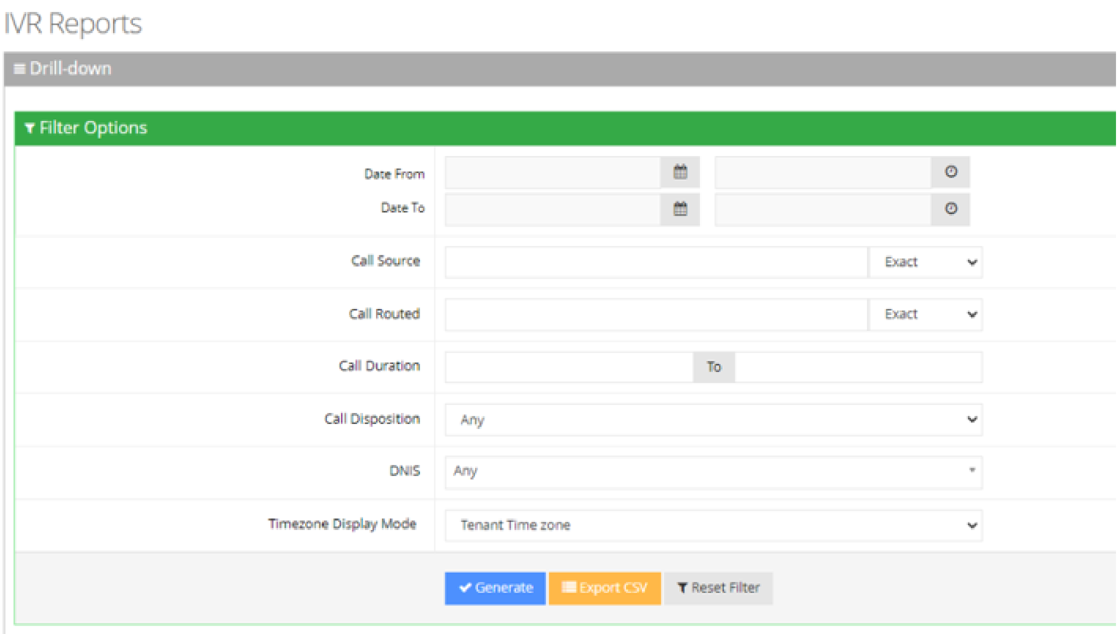
3. From the 'Actions' drop-down menu, choose **Delete**.

Drill-down Report

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

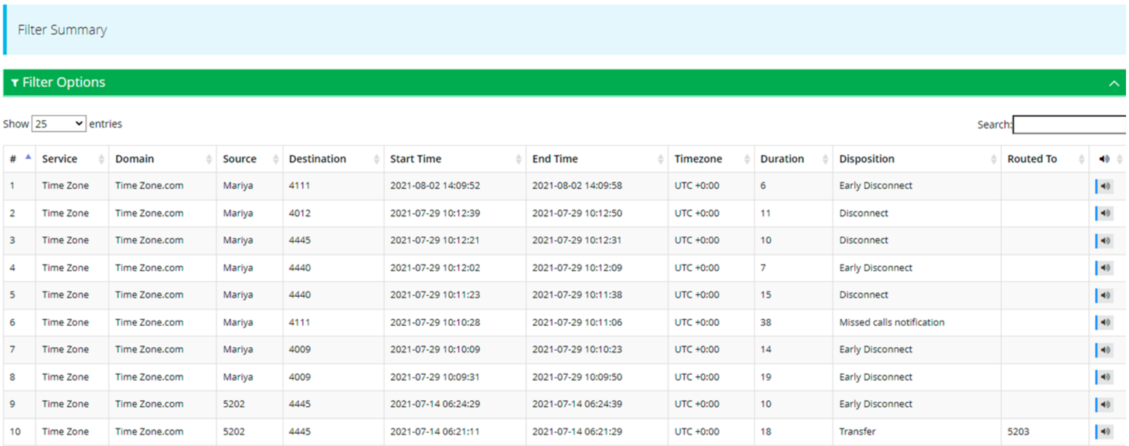
➢ To generate a Drill-down report:

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



2. Select the appropriate filter fields:

   - **Date From:** Defines this report for a specific date/time range.
   - **Date To:** Defines this report for a specific date/time range.
   - **Call Source:** Defines information that is related to a specific source number.
   - **Call Routed:** Defines information that is related to a call that was routed to a specific destination.
   - **Call Duration:** Defines information that is related to a specific duration of a call.
   - **Call Disposition:** Defines information related to calls that ended with a specific disposition or "Any'. For an explanation of the different call dispositions, see Call Dispositions.
   - **DNIS:** Defines information that is related to a specific leading phone number.
   - **Timezone Display Mode:** Defines this report in different time zone:
     - **Tenant Time zone:** Defines the information in this report based on the tenant configured time zone.
     - **Flow Time zone:** Defines the information in this report based on the time zone configured under the **Telephony Setting** settings.
     - **Local Time zone (Web):** Defines the information in this report on the browser local time zone.



Filter Summary

Filter Options

Show 25 entries

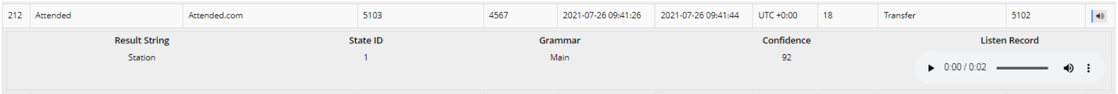
Search:

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

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

Report Column	Description
Customer	Defines the customer name.
Domain	Defines the domain name.
Source	Defines the phone number the call was made from.
Destination	Defines the destination phone number.
Start Time	Defines the start time of the call adjusted to the timezone selected in the filter.
End Time	Defines the end time of the call adjusted to the timezone selected in the filter.
Timezone	Defines the relevant timezone according to the option selected in the filter.
Duration	Defines the duration of the call.
Disposition	Defines the disposition of the call.
Routed To	Defines the number of where the call has been routed to.
	Opens the CDR and displays more information, including a recording of the call.

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



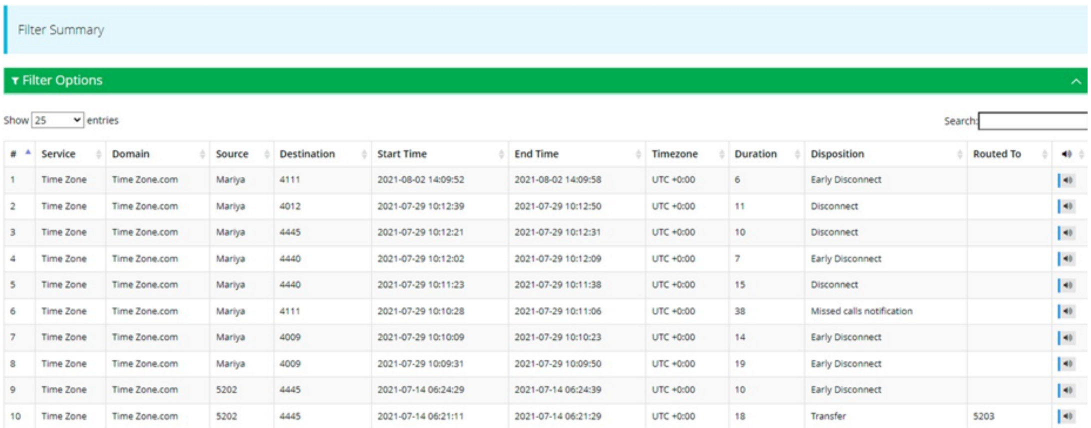
212	Attended	Attended.com	5103	4567	2021-07-26 09:41:26	2021-07-26 09:41:44	UTC +0:00	18	Transfer	5102	

Result String	State ID	Grammar	Confidence	Listen Record
Station	1	Main	92	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:

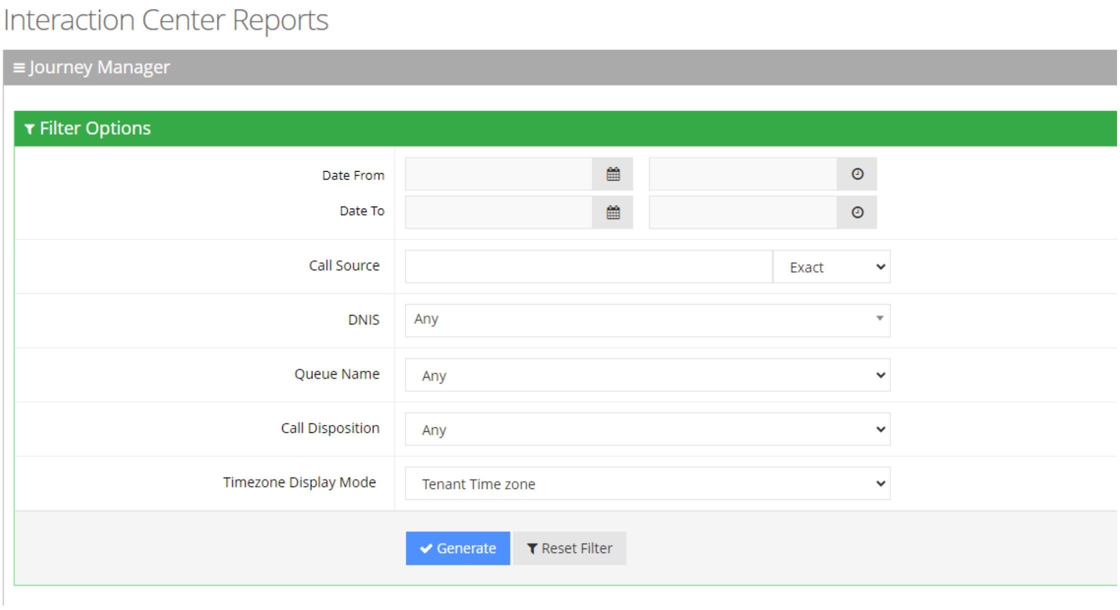
#	Service	Domain	Source	Destination	Start Time	End Time	Timezone	Duration	Disposition	Routed To	
1	Time Zone	Time Zone.com	Mariya	4111	2021-08-02 14:09:52	2021-08-02 14:09:58	UTC +0:00	6	Early Disconnect		
2	Time Zone	Time Zone.com	Mariya	4012	2021-07-29 10:12:39	2021-07-29 10:12:50	UTC +0:00	11	Disconnect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

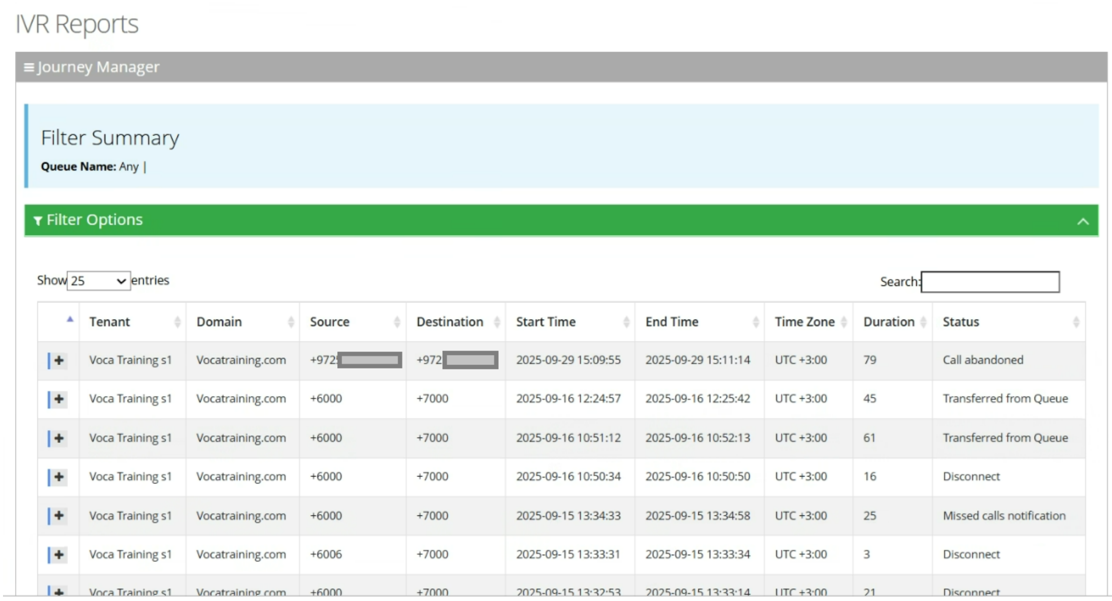
➢ To generate the Journey Manager report:

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

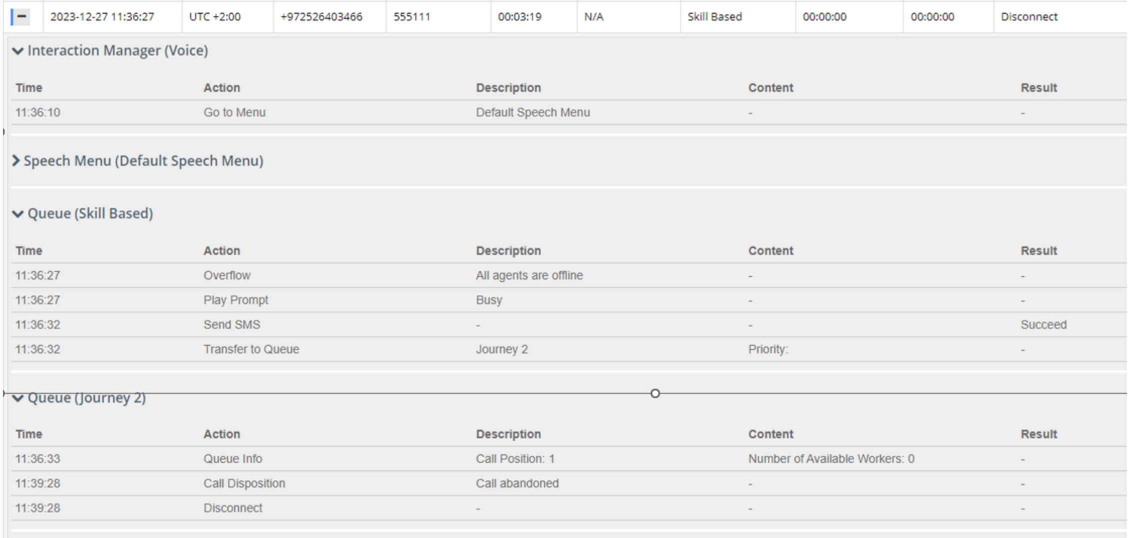


2. Select the appropriate filter fields to generate your report:
   - **Date From:** Displays this report for a specific date/time range.
   - **Date To:** Displays this report for a specific date/time range.
   - **Call Source:** Displays information that is related to a specific source number.
   - **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 278.
   - **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.



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)

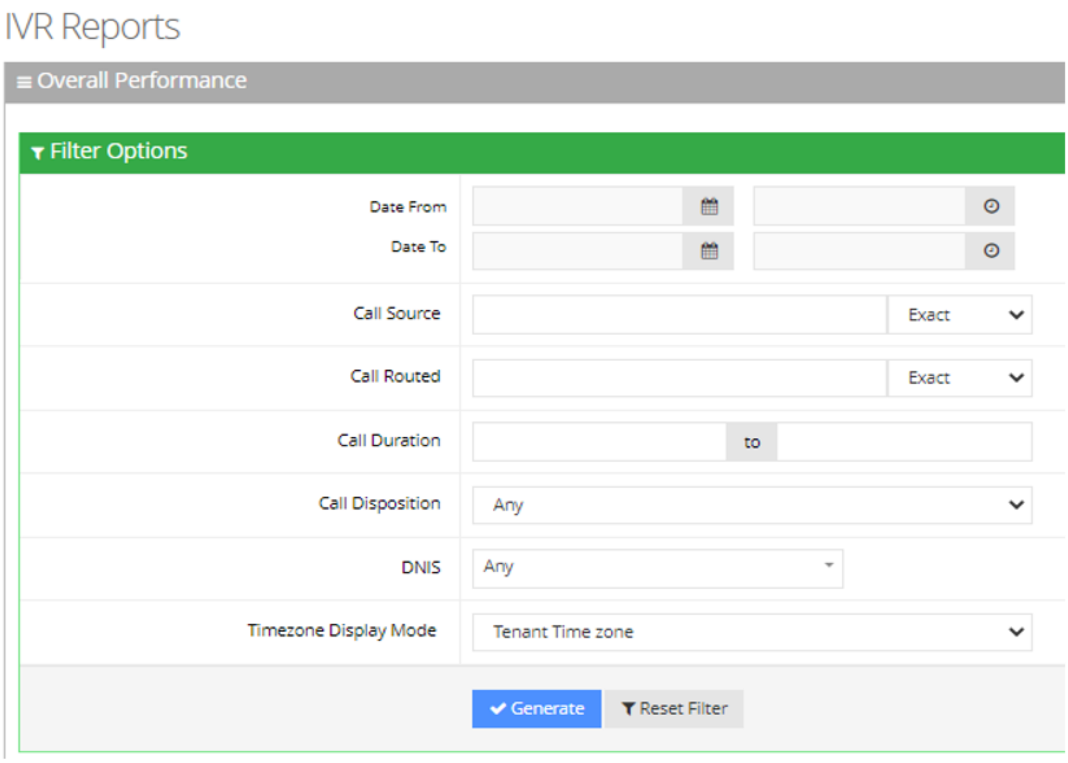
Time	Action	Description	Content	Result
11:36:33	Queue Info	Call Position: 1	Number of Available Workers: 0	-
11:39:28	Call Disposition	Call abandoned	-	-
11:39:28	Disconnect	-	-	-

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.



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

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

For an explanation of the different call disposition, refer to Call Dispositions.

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

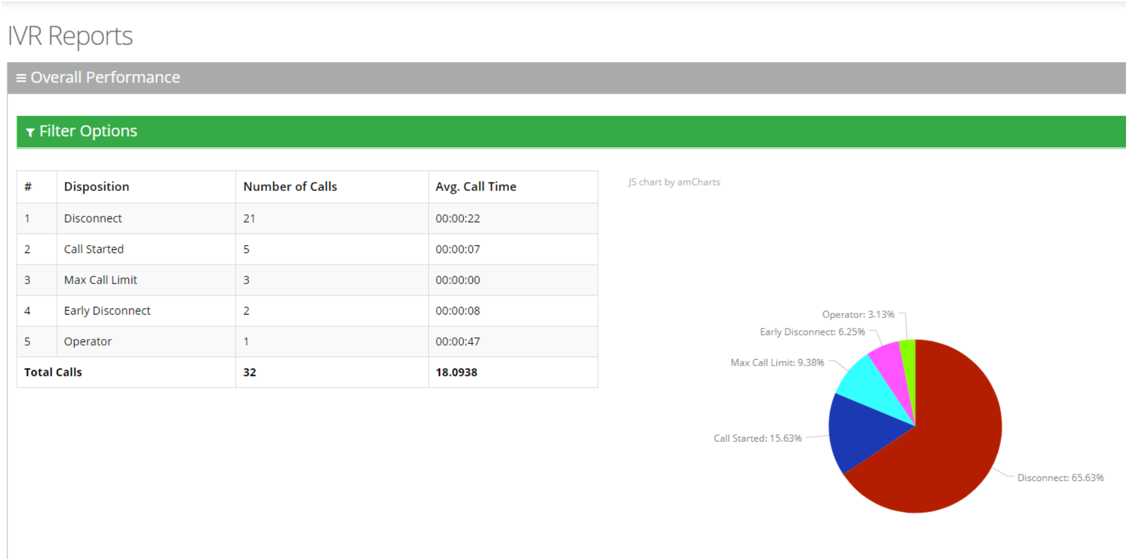
The time zone of calls can be one of the following options:

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

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

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

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



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

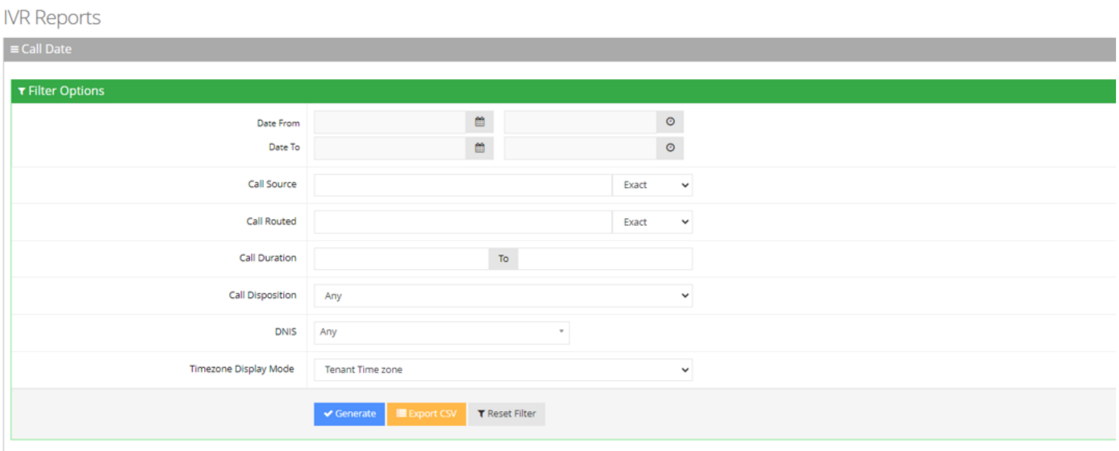
Call Hour Report

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

➢ To generate a Call Hour IVR report:

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

Figure 7-1: Call Hour IVR Filter Options



2. Select the appropriate filter fields:

   - **Date From:** Defines this report for a specific date/time range.
   - **Date To:** Defines this report for a specific date/time range.
   - **Call Source:** Defines information that is related to a specific source number.
   - **Call Routed:** Defines information that is related to calls routed to a specific destination.
   - **Call Disposition:** Defines information that is related to calls that ended with a specific disposition or "Any'. For an explanation of the different call dispositions, see Call Dispositions.

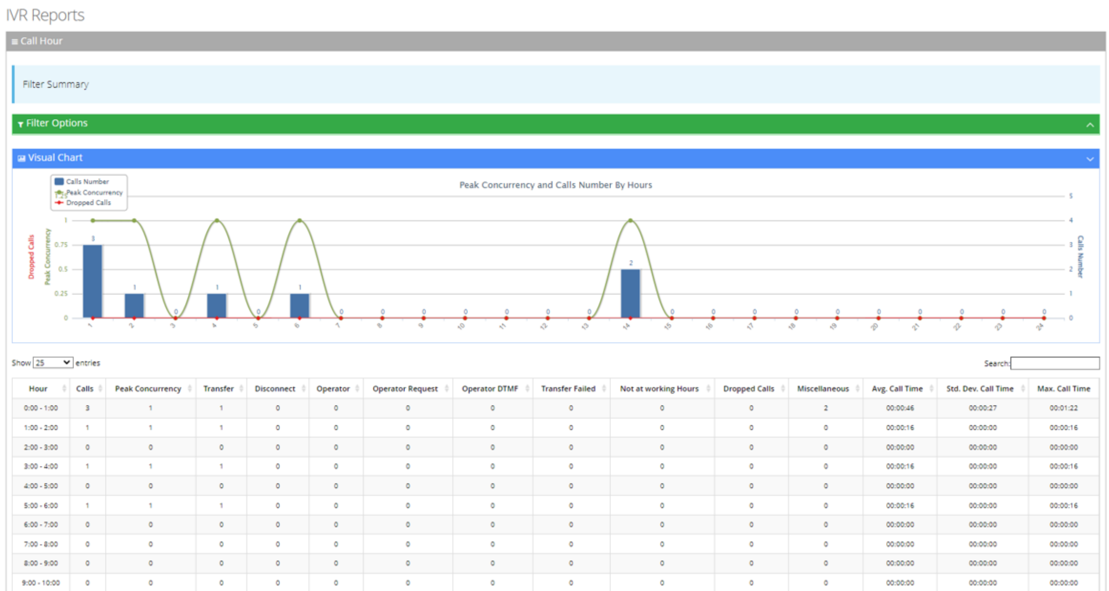
- **DNIS:** Defines information that is related to a specific destination number.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls can be one of the following options:
    - **Tenant time zone:** Defines the information in this report based on the tenant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

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

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



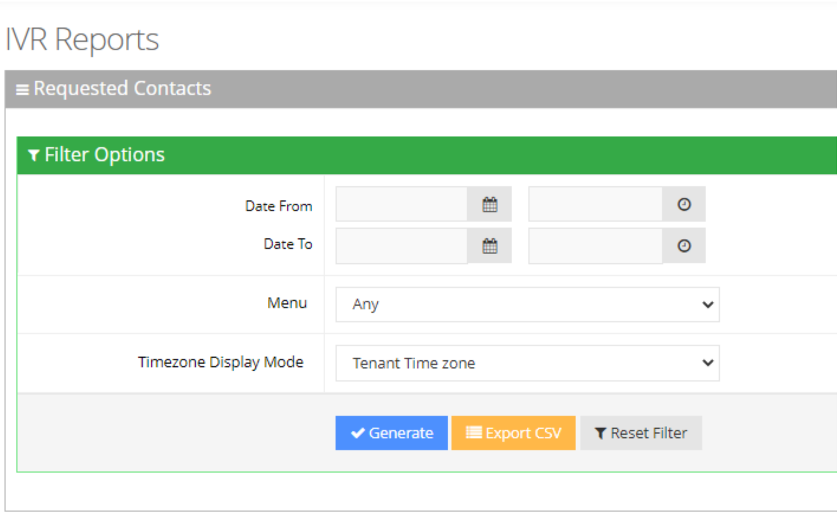
Hour	Calls	Peak Concurrency	Transfer	Disconnect	Operator	Operator Request	Operator DTMF	Transfer Failed	Not at working Hours	Dropped Calls	Miscellaneous	Avg. Call Time	Std. Dev. Call Time	Max. Call Time
0:00 - 1:00	3	1	1	0	0	0	0	0	0	0	2	00:00:46	00:00:27	00:01:22
1:00 - 2:00	1	1	1	0	0	0	0	0	0	0	0	00:00:16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

Requested Contacts Report

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

➢ To generate a Requested Contacts report:

1. Open the Requested Contacts page (**Reports** > **IVR Reports** > **Requested Contacts**); the following appears.



2. Select the appropriate filter fields:

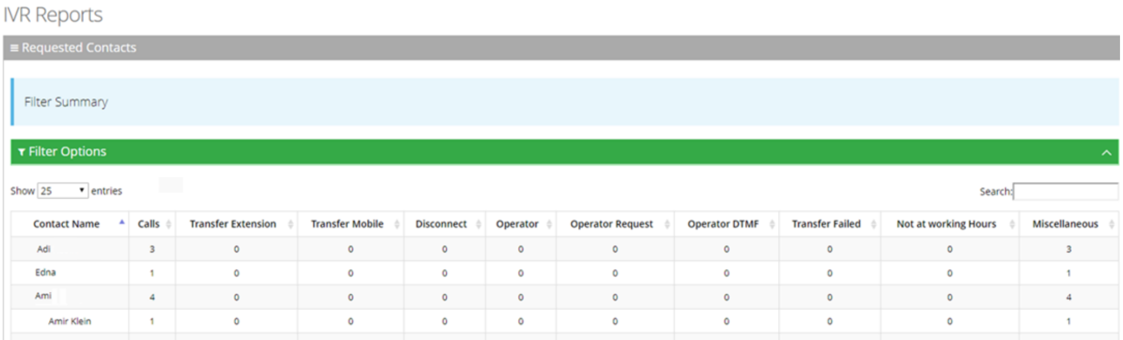
- **Date From:** Defines this report for a specific date/time range.
- **Date To:** Defines this report for a specific date/time range.
- **Menu:** Defines information that related to specific menu or "Any'.
- **Timezone Display Mode:** Defines this report in different time zones. The time zone of calls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

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

Report Column	Description
Calls	Defines the number of calls made to the Contact.
Transfer Extension	Defines the number of calls that were transferred to the Customer's extension.
Transfer Mobile	Defines the number of calls that were transferred to the Customer's mobile.
Disconnected	Defines the number of calls that were disconnected.
Operator	Defines the number of calls that were transferred to the operator.
Operator Request	Defines the number of calls that were requested to be transferred to

Report Column	Description
	the operator.
Operator DTMF	Defines the number of calls that used the Operator DTMF.
Transfer Failed	Defines the number of calls that the transfer failed.
Not at Working Hours	Defines the number of calls made outside of working hours.
Miscellaneous	Defines the number of calls that do not come under other dispositions in this report.

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



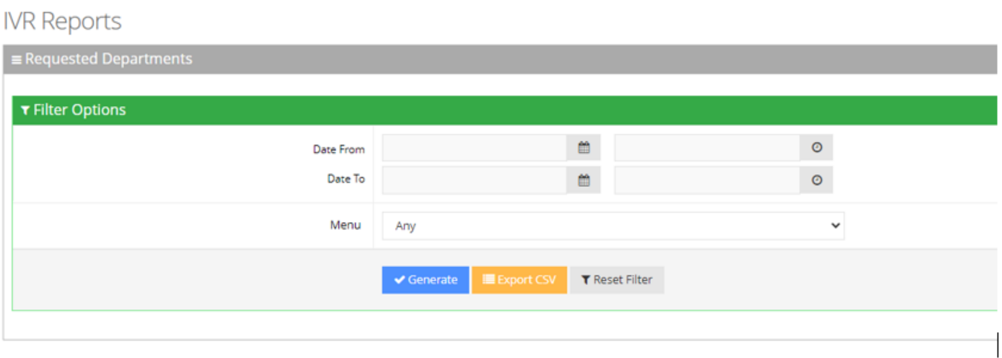
Requested Departments Report

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

➢ **To generate a Requested Departments report:**

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

Requested Departments



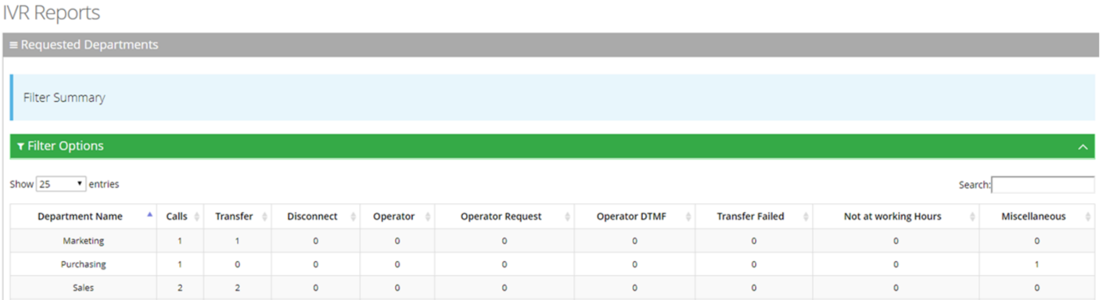
2. Select the appropriate filter fields:

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

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

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

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



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

8 Actions

The following 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:

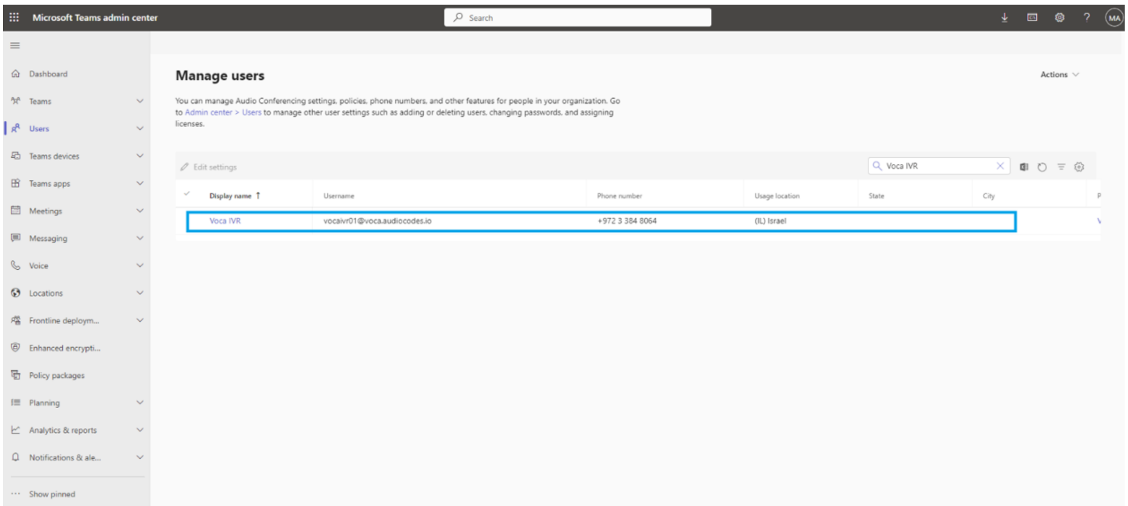
- **All Agents are Offline:** All worker/queue members are logged out from the queue.
- **Call Abandoned:** The call was abandoned while waiting in the queue.
- **Call Started:** Script execution failed. Error in Communication Portal software. Please contact Voca Team.
- **Disconnect:** Refers to calls 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

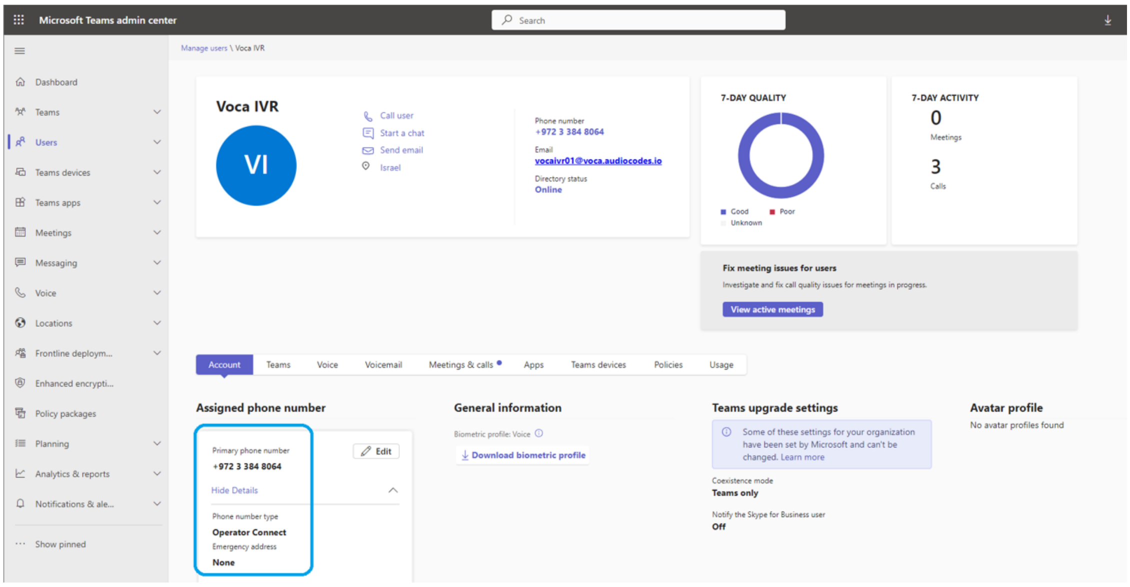
To use a DNIS number that supports Operator Connect or Microsoft Calling plan, make sure you have a designated Microsoft Teams user for it. If not, do the following:

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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International Headquarters

6 Ofra Haza Street

Naimi Park

Or Yehuda, 6032303, Israel

Tel: +972-3-976-4000

Fax: +972-3-976-4040

AudioCodes Inc.

80 Kingsbridge Rd

Piscataway, NJ 08854, USA

Tel: +1-732-469-0880

Fax: +1-732-469-2298

Contact us: https://www.audiocodes.com/corporate/offices-worldwide

Website: https://www.audiocodes.com/

Documentation Feedback: https://online.audiocodes.com/documentation-feedback

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