votacall
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ADMINISTRATOR PORTAL
GUIDE

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1) Introduction

a) Guide Explanation

This guide is to be used as an aid to understand the Votacall VoIP Service Portal in order to utilize all the functionality that Votacall VoIP has to offer. This Admin guide encompasses all of the most popular Admin Features along with some user features that are only accessible by the Administrator. Although not every feature for every license type is touched upon here, the features included in this administration guide are the most popular and more difficult to configure than standard user options.

b) Access to site

In order to access the site, you will need Internet explorer or Firefox. The address to the portal is http://portal.votacall.com.You will need to obtain a username and password from Votacall for the administration log in to your account.

c) Site Navigation

The Votacall Portal is setup in a hierarchal fashion, with the group services at the initial home or group level, and the user functions on the user level. You can determine which level you're at by looking at the top left of your portal screen.

In the picture above, we are in Votacall_1002 account under users, which is under the group level 10000_Votacall. Service Provider is the top level of the system and you will not see this as an option under a group admin login. To return to the group level, Simply click on the "10000_Votacall" Link on the top left, or the "Home" Link on the top right of the portal.

d) Help

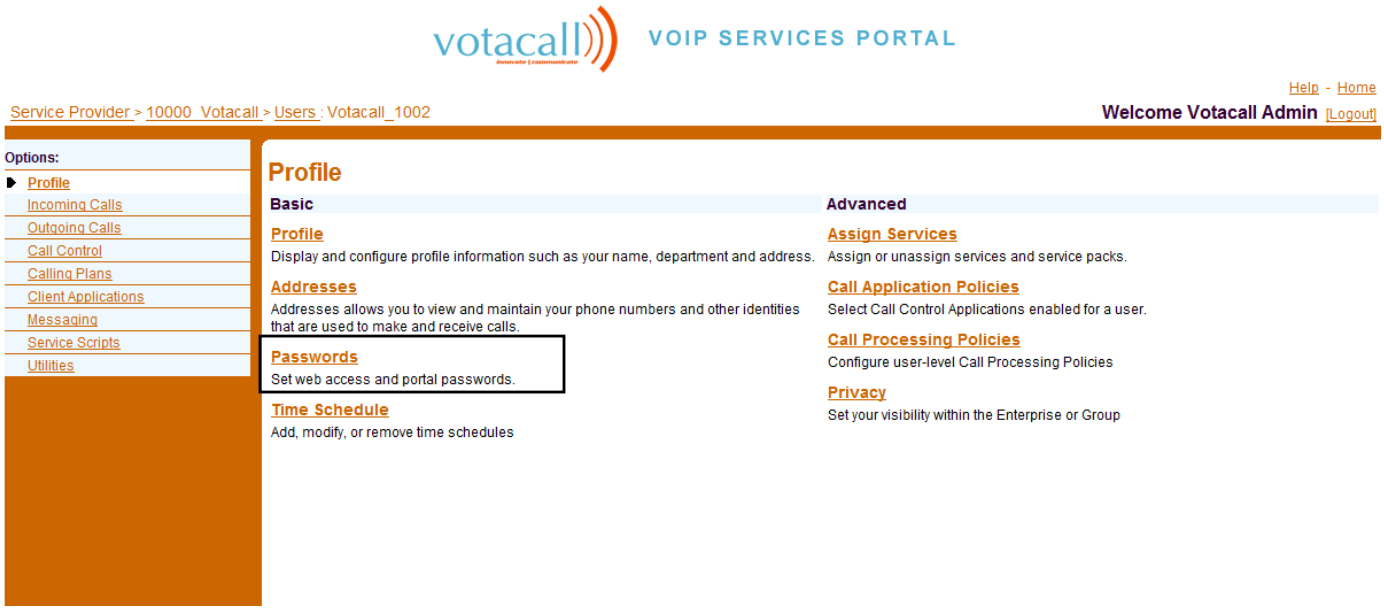
Each page in the portal has a help button on the upper right part of the screen as displayed below:

Each help button is catered to the page you're currently on. If you wish to know more information about a certain feature, click on that feature and press the help button. You will be given some information about what the feature does plus all the configurable options of that specific feature.

e) Changing Passwords

In order to change the password for your web account, you should do the following:

i) Click on **"Passwords"** at the initial Welcome Screen show below:



ii) Type in current password then the new password twice

iii) Hit **"Apply"** or **OK** to save changes

f) Editing Administrators

As an Administrator, you are able to create other Administrator Accounts and give them special privileges based on their role. There is no limit to the amount of administrators you can have. To do so you must do the following:

i) At the group level, click **"Administrators"**

ii) To Add an Administrator, click on the **"Add"** Button, to Edit an Administrator, click on the administrator's name

iii) To create or edit an Administrator, you will need to populate the following

(1) **Administrator ID:** Used for the newly created administrator to login to the portal
(2) **Last Name and First Name**
(3) **Initial Password and retyping password**

(4) **Administrator Type:** Either group access or Department access. You can specify which department you wish to assign the administrator to.

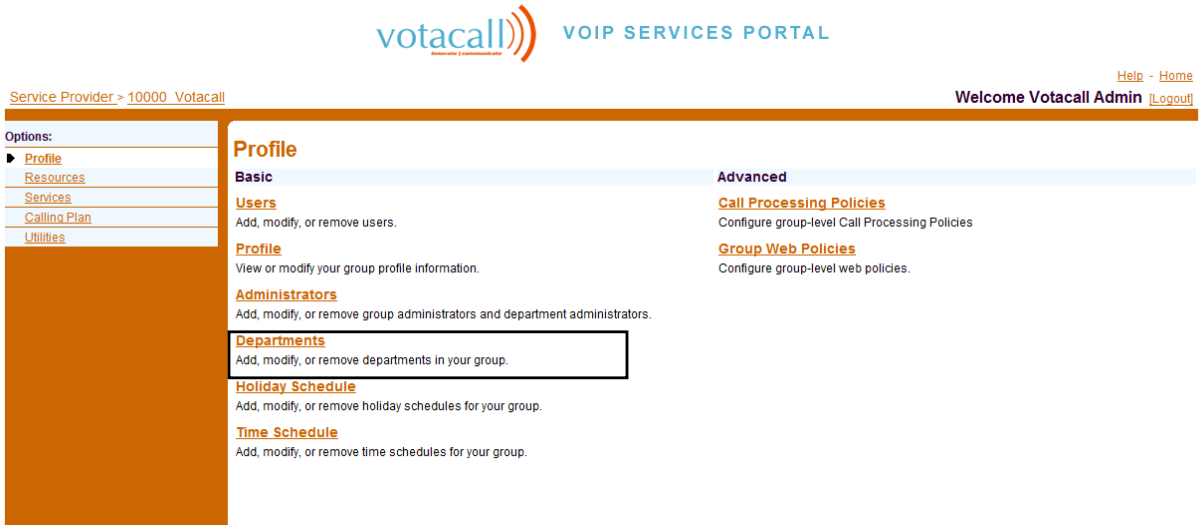
iv) Click **"OK"** to save the changes

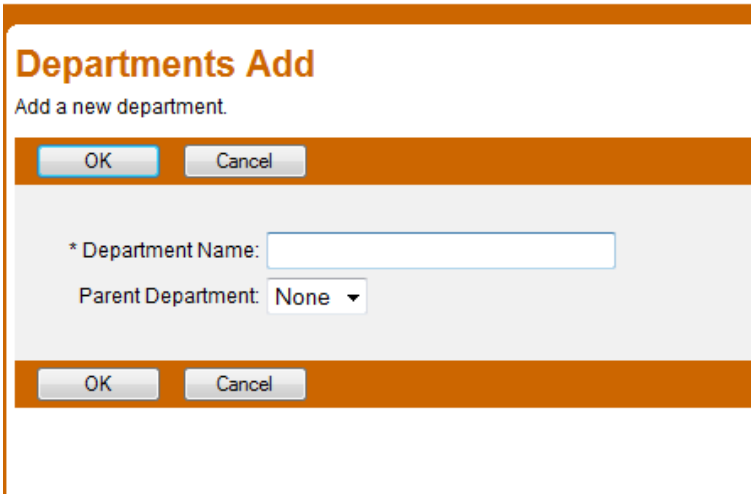
g) Departments

Creating departments can separate your company for organizational purposes. You may also use separate departments to utilize separate music on holds for each department or to limit the scope of extensions and name dialing in the Auto attendant. To Create a Department you must do the following:

i) At the group level, click **"Departments"**

ii) Click **"Add"** to create a department. To edit an already configured Department, click on the Department name.



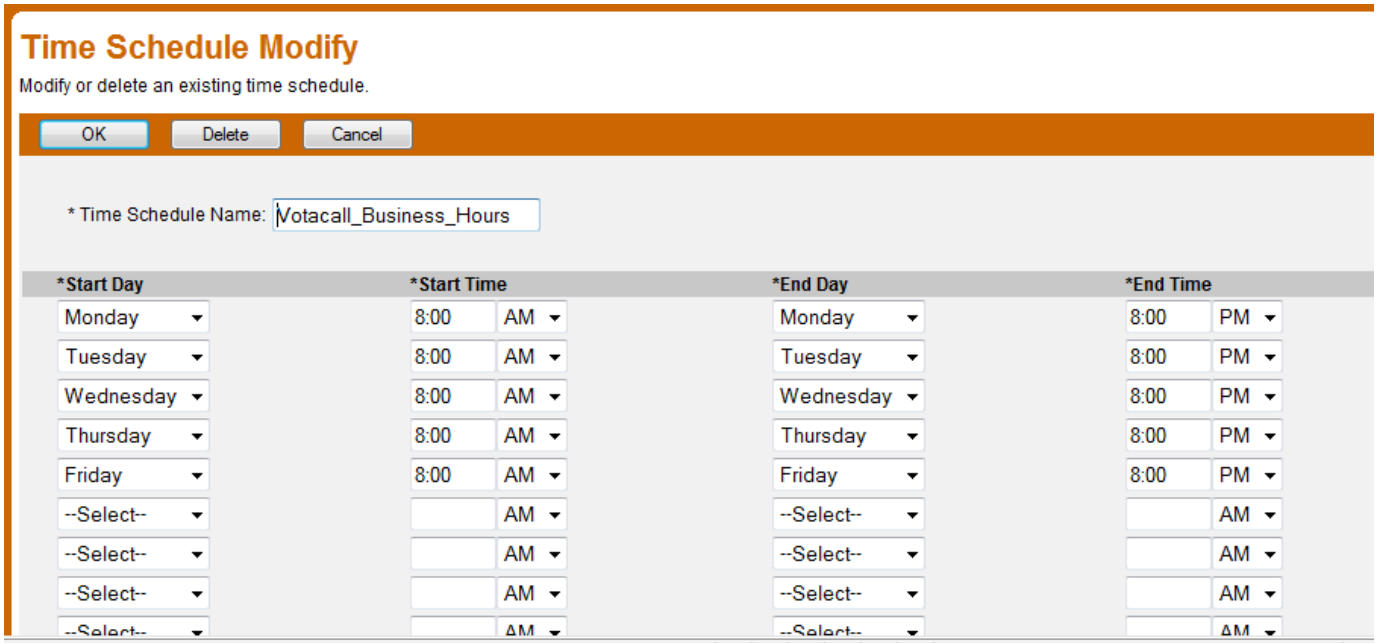


iii) Type in the Department Name and use the dropdown if you wish to have it be a subsidiary of another department
iv) Click **"OK"**

h) Setting Time Schedules

Time Schedules can be created to be used for other features of your Votacall System. You will need to create time schedules if you wish to utilize the following features: Auto Attendant Day and Night Service, Selective Call Forwarding, Selective Call Rejection, Selective Call Acceptance and Priority Alert (optionally sequential ring). Multiple time schedules can be created in order to enhance these features. To make a time schedule you must do the following:

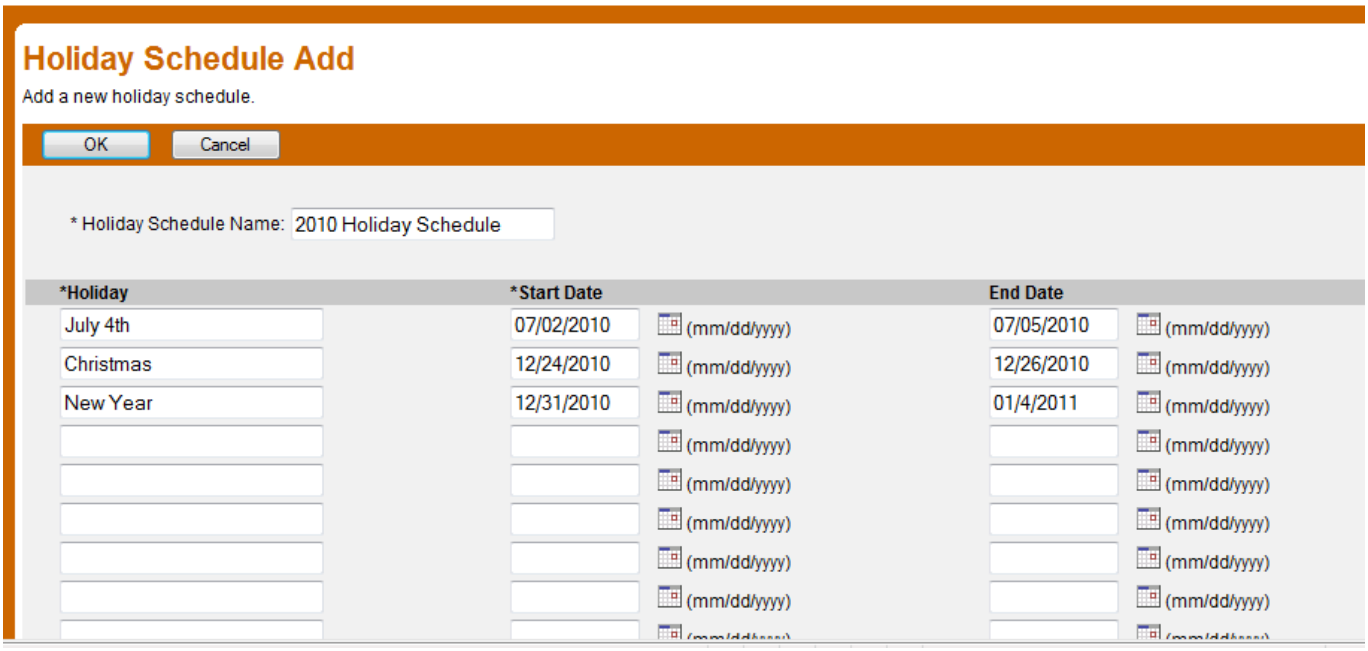
i) Click on **"Profile"** on the left
ii) Click on **"Time Schedule"**
iii) Click on **"Add"** to create a new time schedule or click on an existing time schedule to modify a time schedule.
iv) Enter the Name of the time schedule you wish to have under **"Time Schedule Name"**



v) Begin entering in the time schedule information and click **"OK"** when you are complete.

i) Setting Holiday Schedules

Holiday schedules can be set so that during the configured holidays, Auto Attendants can play the afterhours greeting on the days that the holidays are set. To Create a Holiday schedule click **"Add".** To edit an already configured Holiday schedule, click on the Holiday schedule name.



To configure the Holiday schedule you will need to do the following:

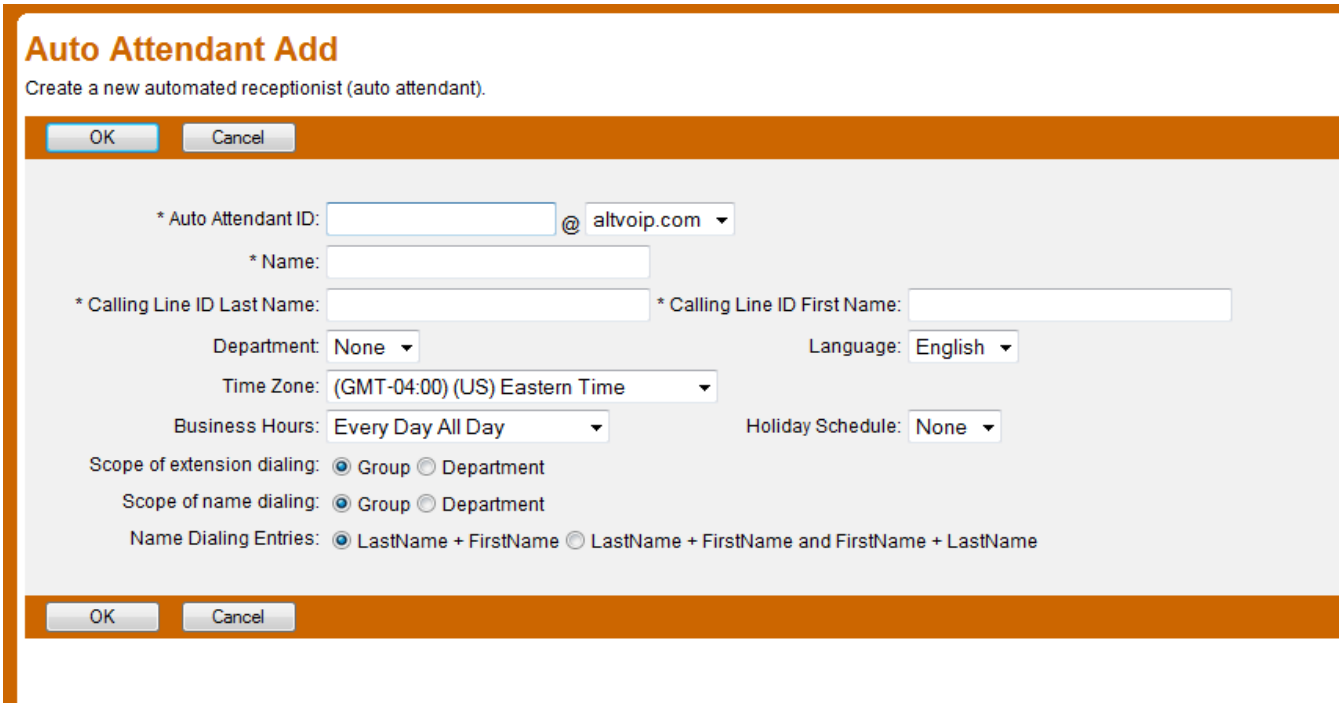
i) **Holiday Schedule Name**: Descriptive name for your holiday schedule
ii) **Holiday entry:** Enter the holiday name, Start date, and End Date. If the holiday is 1 day long, only enter in the start date
iii) Click **"OK"**

2) Group Services

a) Auto Attendants

Auto Attendants provides a service where users can hear an automated greeting and choose a variety of options to get to their intended destination from any touch tone phone. Auto Attendants can have multiple DID's and services like Call forwarding selective, busy and always. A group or company can have multiple Auto Attendants. To configure an Auto Attendant you must do the following:

i) On the Group level, click **"Services"**
ii) Click **"Auto Attendant"**
iii) Choose the auto attendant you wish to edit by clicking on the name of an existing AA. If you wish to create a new Auto Attendant, click **"Add"** And proceed to step (v)
iv) Click **"Profile"**



v) In this menu, you are able to edit the following:
(1) **Name:** Changes the display name in the portal
(2) **Department:** Allocates the selected Auto Attendant to a specific department. This comes in handy if you wish for an administrator who only has department access to make changes to this Auto Attendant

(3) **Time Zone:** Set to companies current time zone

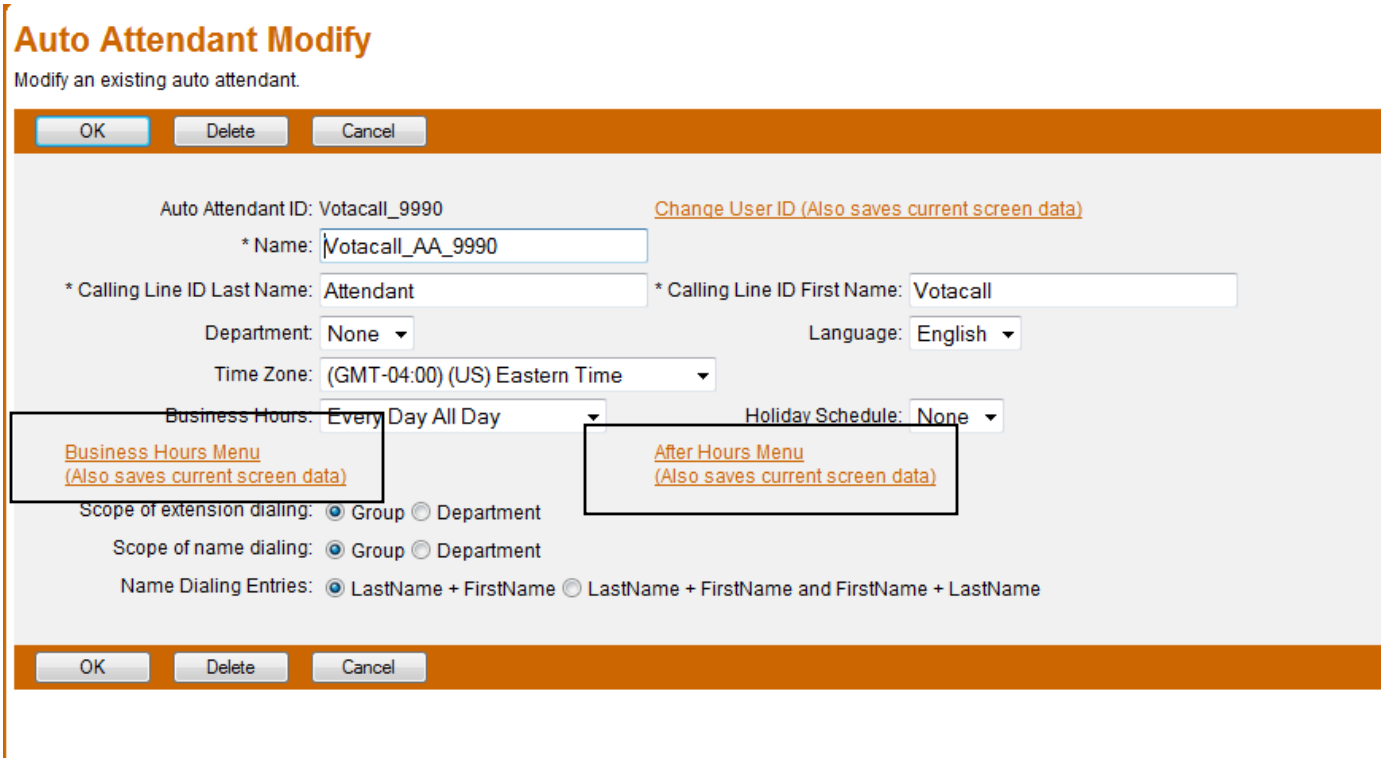
(4) **Business Hours:** If you wish to utilize the afterhour's menus, choose the correct business hours from the drop down box. To create the business hours, see the Section labeled **Business Hours** above

(5) **Holiday Schedule:** You can use the dropdown box to choose a holiday schedule or leave it at None

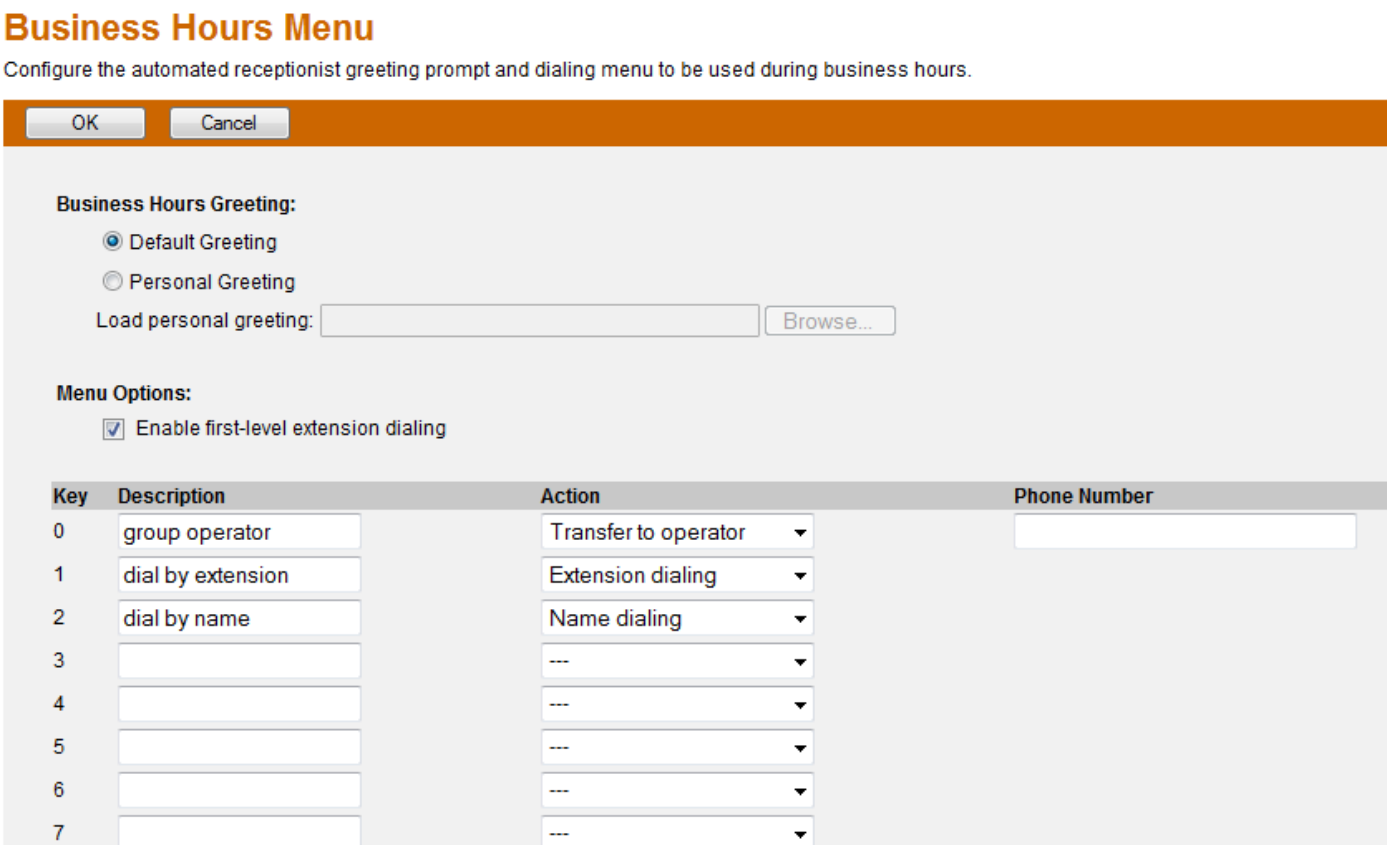
(6) **Scope of Extension Dialing / Scope of Name Dialing**: If you are an enterprise company, you may have the scope of extension dialing or Name Dialing in the auto attendant be everyone in the enterprise, everyone in the group, or everyone in a certain department

(7) **Name Dialing Entries**: the first radio button means that callers will have to enter in the persons last name then first name to reach the desired user. The second radio button specifies that callers can enter the desired users first or last name to reach them.

ii) Once an Auto Attendant has been edited or created, you may change the actual Auto Attendant options by clicking on either one of the highlighted links below:



You will then be brought to the following screen:



iii) Business Hours / After Hours Greeting: The default greeting should be overwritten with a personal greeting. The personal greeting can be uploaded onto the computer or recorded through your Votacall Phone on the system. To upload an auto attendant greeting, you will need record the file locally and convert the audio file into the following format:
(1) CCITT u-Law or A-Law
(2) 8.000 kHz
(3) 8 bit Mono
(4) .WAV file Type
If you wish to use your Votacall Phone System to record the greeting, please contact a Votacall Support representative in order to receive those instructions.

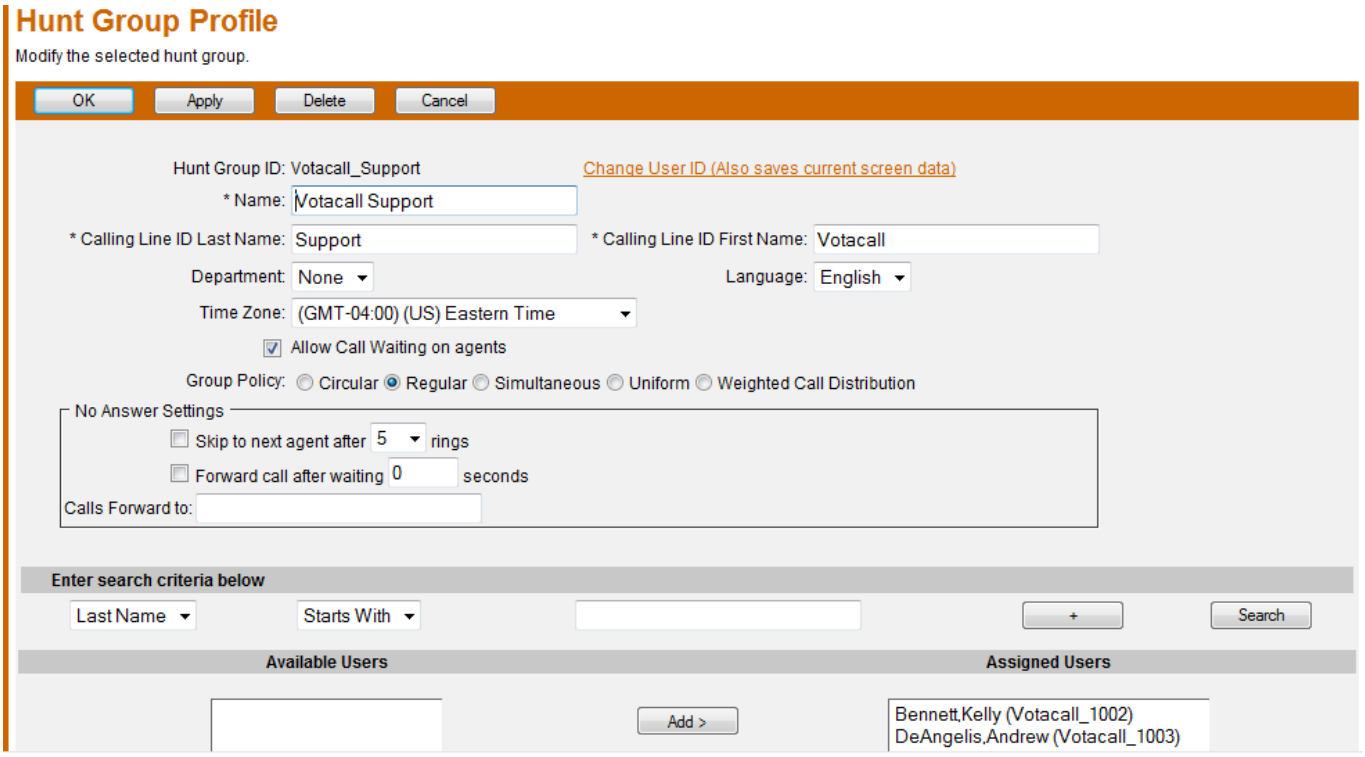
iv) **Enable first-level extension dialing:** When checked, will allow users to enter the extension of the party they're trying to reach without listening to the full Auto Attendant Greeting

v) You can configure any key to do one of the following options:
   (1) **Transfer with Prompt:** Plays the message "Your call is being transferred, please hold" Then transfers the call. You are capable of putting an extension or any full DID or phone number into the phone number field
   (2) **Transfer without prompt:** Does the same as Transfer with prompt but does not play the message.
   (3) **Transfer to Operator:** Does the same as Transfer with Prompt but the message says "Please stay on the line while your call is transferred to the operator"
   (4) **Name Dialing:** Brings the user to the automated name directory where the user can dial by first or last name as specified on the previous screen
   (5) **Extension Dialing:** Prompts for the user to enter in an extension then transfers the user
   (6) **Repeat Menu:** Replays the Auto Attendant Greeting
   (7) **Exit:** Terminates the call
vi) Press OK to Save the Changes

b) Hunt Groups

Hunt groups provide a way for calls to reach a number of users in your group using different call distribution options. To use the hunt group feature you must do the following:

i) On the Group level, click **"Services"**
ii) Click **"Hunt Group"**
iii) Choose the hunt group you wish to edit by clicking on the name. If you wish to create a new Hunt Group, click **"Add"** And proceed to step (v)
iv) Click **"Profile"**
v) You should see a screen like below:



vi) You will need to configure the following options:

(1) **Hunt Group ID:** Enter in a unique hunt group ID

(2) **Name:** Enter in a unique name

(3) **Calling Line ID Last Name / First Name:** Enter in the calling Line ID first and last name. This Calling Line ID will precede the calling line ID name of each caller displayed on the phone.

(4) **Department:** Use the drop-down to select a department or keep it as None

(5) **Time Zone:** Choose the time zone the hunt group is currently in

(6) **Allow Call waiting on agents:** When checked, calls that are routed to a particular caller when their on the phone will receive a call waiting tone on their phone. When unchecked, the hunt group will check to see if the caller is on the phone. If the caller is on the phone, it will bypass the caller and go to the next designated caller.

(7) **Group Policy:** Choose one of the following hunt group distribution policies:

(a) **Circular:** Incoming calls come in the order appeared on the list. Once a call is answered, the next incoming call picks up where the last call left off and circles around.

(b) **Regular:** Incoming calls hunt through agents in the order they appear in the list, starting from the top each time.

(c) **Simultaneous:** Incoming calls alert all agents at the same time. The first agent to answer handles the call.

(d) **Uniform:** Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call

(e) **Weighted Call Distribution:** Incoming calls are assigned to idle agents based on percentages you assign on the Hunt Group's *Profile – Weighted Call Distribution* page.

(8) **No Answer Settings:** This option sets how the service behaves if a user doesn't answer the call.

(a) Check the **Skip to next agent after X rings** check box to pass incoming unanswered calls to the next user after the specified number of rings, as determined by the current group policy.

(b) Check the **Forward call after waiting X second's** check box to forward calls that have not been answered by any user after the specified number of seconds to the phone number specified in the **Calls Forward to** text box. This box accepts values from 0 to 7200 seconds (2 hours).

(c) Enter a number in the **Calls Forward to** text box to transfer calls to the specified number when a call is not answered in the time specified by the **Forward call after waiting X second's** control.

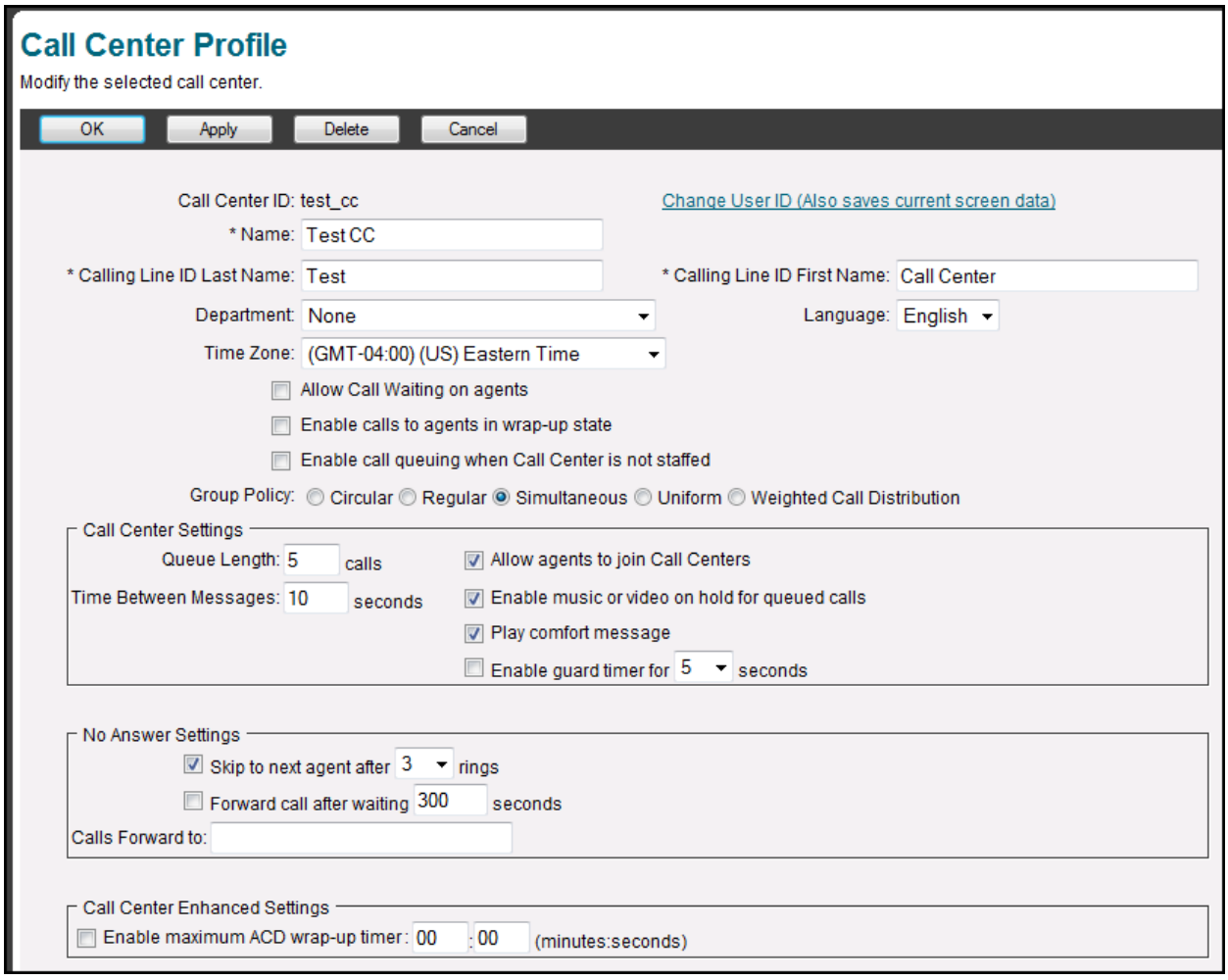
(9) Next, assign users to the hunt group by clicking the search button and adding them to the Available user's column. Use the Move Up and the Move Down buttons to re-arrange the order for circular and regular call policies

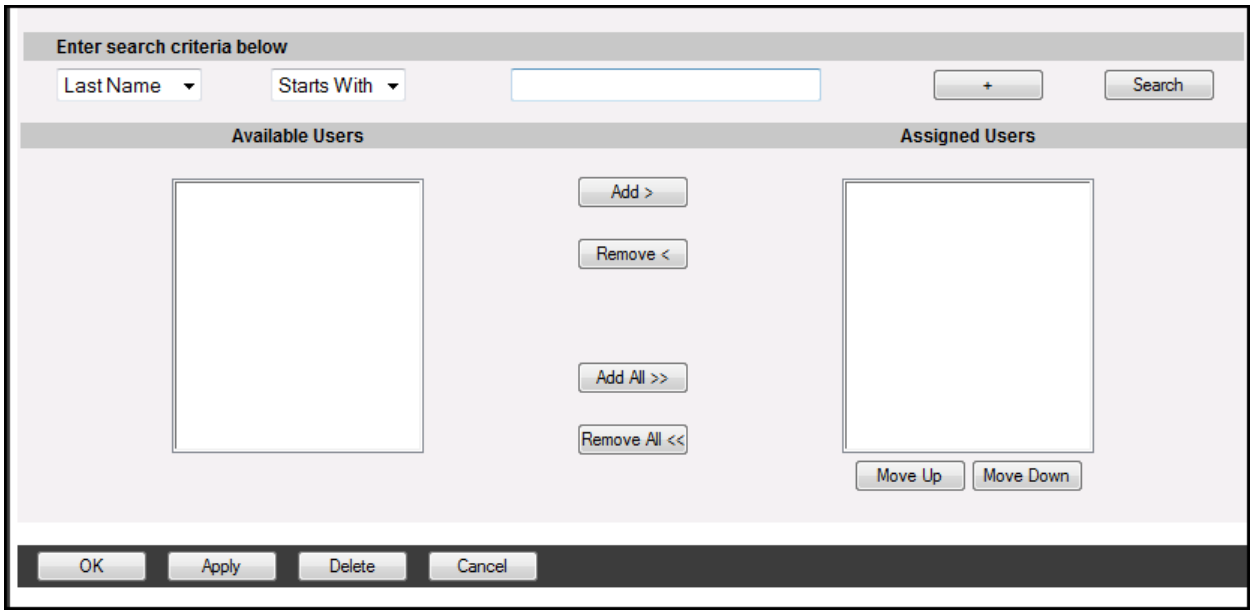
vii) Hit **"OK"** to save

c) Call Centers

Call Centers automatically process incoming calls received by a phone number by distributing them to a group of users or agent. The features of a call center are similar to a hunt group but have enhanced features such as agent log in and log out, call queuing, and overflow control. You may also assign services to the call center like call forwarding selective, always, etc. To manage your call center you will need to do the following:

i) On the Group level, click **"Services"**
ii) Click **"Call Center"**
iii) Choose the call center name you wish to edit by clicking on the name.
iv) Click **"Profile"**
v) You should see a screen like below:





vi) You may edit the following options in the Call Center:

(1) **Call Center ID:** Enter in a unique hunt group ID

(2) **Name:** Enter in a unique name

(3) **Calling Line ID Last Name / First Name:** Enter in the calling Line ID first and last name. This Calling Line ID will precede the calling line ID name of each caller displayed on the phone.

(4) **Department:** Use the drop-down to select a department or keep it as None

(5) **Time Zone:** Choose the time zone the hunt group is currently in

(6) **Allow Call waiting on agents:** When checked, calls that are routed to a particular caller when their on the phone will receive a call waiting tone on their phone. When unchecked, the hunt group will check to see if the caller is on the phone. If the caller is on the phone, it will bypass the caller and go to the next designated caller.

(7) **Enable Call to agents in wrap-up state:** When checked will send calls to agents in wrap-up mode

(8) **Enable call queuing when Call Center is not staffed**: When checked will queue calls when no one is logged into the call center

(9) **Group Policy:** Choose one of the following hunt group distribution policies:

(a) **Circular:** Incoming calls come in the order appeared on the list. Once a call is answered, the next incoming call picks up where the last call left off and circles around

(b) **Regular:** Incoming calls hunt through agents in the order they appear in the list, starting from the top each time.

(c) **Simultaneous:** Incoming calls alert all agents at the same time. The first agent to answer handles the call.

(d) **Uniform:** Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call

(e) **Weighted Call Distribution:** Incoming calls are assigned to idle agents based on percentages you assign on the Hunt Group's *Profile – Weighted Call Distribution* page.

(10) **Call Center Settings**: You can choose to change the following:

(a) In the **Queue Length** box, type a limit for the number of calls the system keeps on hold, waiting for an available agent.

(b) In the **Time Between Messages** box, type the interval in seconds between each repetition of the comfort message played to queued users, if the **Play Comfort Message** box is checked.

(c) Check the **Allow agents to join Call Centers** box to allow agents to log on to or log off from the queue to receive calls.

(d) The **Enable music on hold for queued calls** option plays the Music/Video On Hold message configured for the group, department, or Call Center to callers in the queue.

(e) The **Play Comfort Message** option plays the comfort message configured for the Call Center to callers in the queue at the intervals specified by the **Time Between Messages** box.

NOTE: If neither the **Enable music on hold** nor the **Play Comfort Message** option is selected, queued calls are placed on hold. If both options are enabled, the music is interrupted by the comfort message at the interval specified by the value in the **Time Between Messages** box. The music resumes playing after the completion of the comfort message in this case.

(f) The **Enable Guard Timer for X seconds** control determines how long the system waits before routing a call to a free agent. When a caller hangs up before an agent, the system may attempt to route another incoming call to that agent before he or she has replaced the handset, causing the call to return to the queue unanswered. When this box is checked, the system waits the specified number of seconds each time an agent's phone indicates that it is ready to receive calls before routing a new call to that agent.

(11) **No Answer Settings:** This option sets how the service behaves if a user doesn't answer the call

(a) Check the **Skip to next agent after X rings** check box to pass incoming unanswered calls to the next user after the specified number of rings, as determined by the current group policy.

(b) Check the **Forward call after waiting X seconds** check box to forward calls that have not been answered by any user after the specified number of seconds to the phone number specified in the **Calls Forward to** text box. This box accepts values from 0 to 7200 seconds (2 hours).

(c) Enter a number in the **Calls Forward to** text box to transfer calls to the specified number when a call is not answered in the time specified by the **Forward call after waiting X seconds** control.

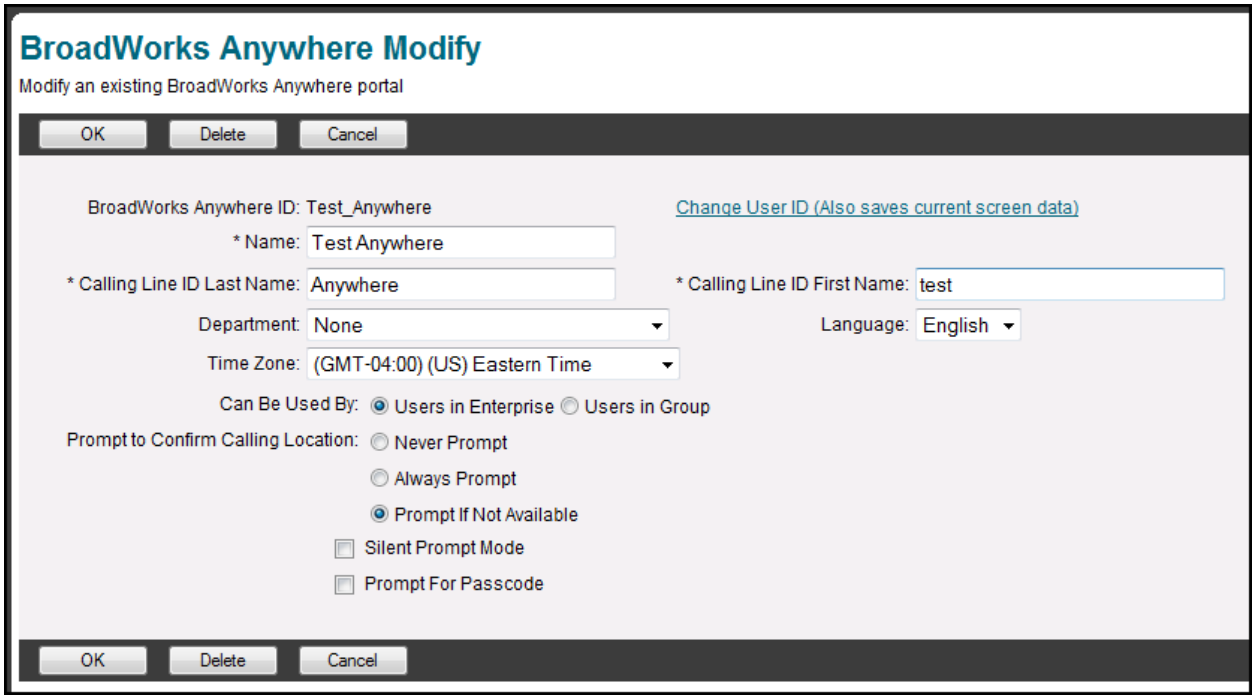
(12) Next, assign users to the hunt group by clicking the search button and adding them to the Available users column. Use the Move Up and the Move Down buttons to re-arrange the order for circular and regular call policies

(13) Hit **"OK"** to save

d) Votacall Anywhere

Votacall Anywhere enables you to make and receive calls from any specified phone just as if it were your primary device. To use the Votacall Anywhere feature, you will need a local DID to route calls to and from. To use Votacall Anywhere you must do the following:

i) On the Group level, click **"Services"**
ii) Click **"Broadworks Anywhere"**
iii) Choose the Votacall anywhere name you wish to edit by clicking on the name.
iv) Click **"Profile"**
v) You should see a screen like below:

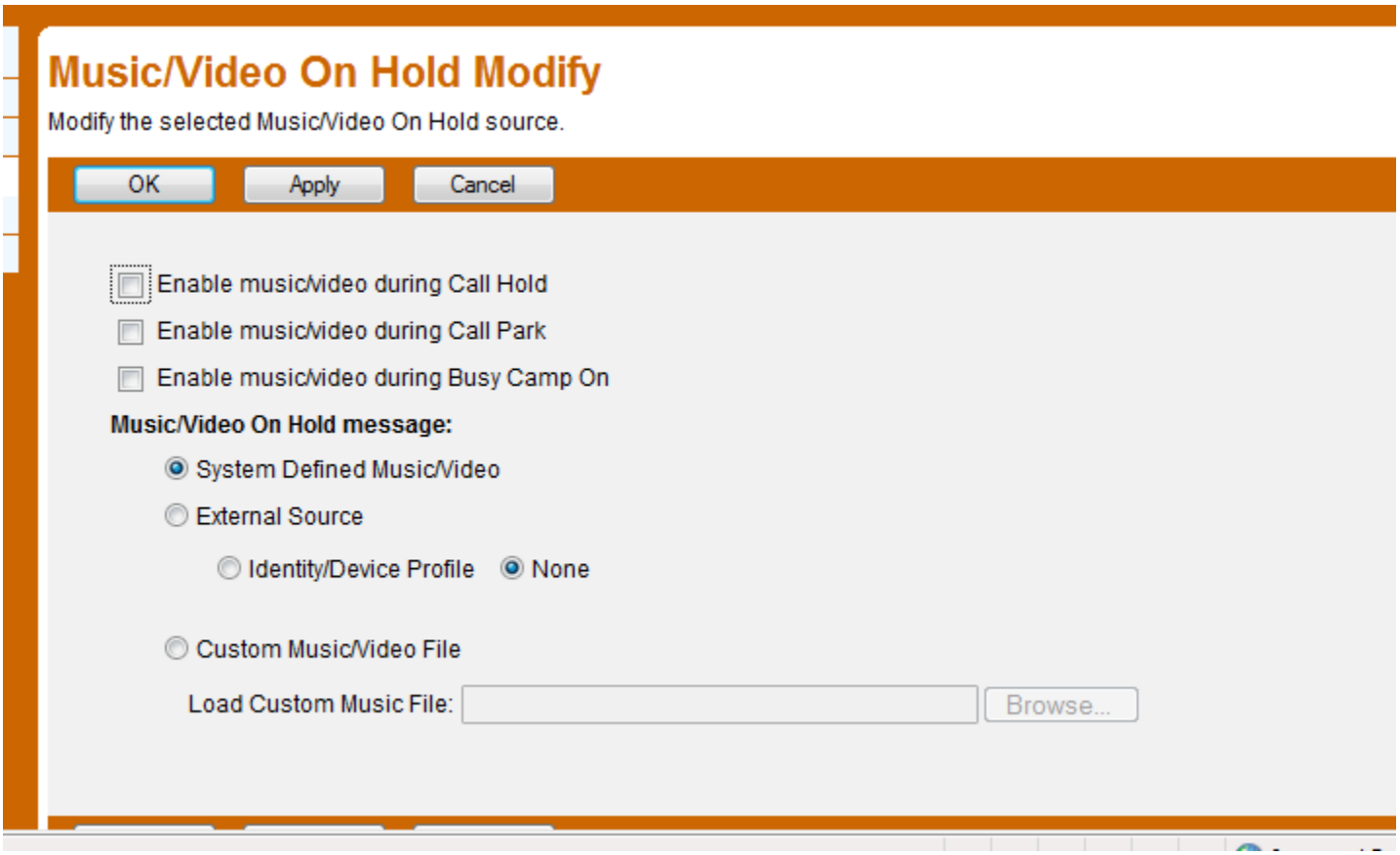


vi) You are able to configure the following options
(1) **Can Be Used By:** If you have an enterprise, you can choose to make an Votacall Anywhere on the enterprise level or the group level
(2) **Prompt to Confirm Calling Location:** "Never Prompt" is for not prompting for calling address, "Always Prompt" is for always prompting for calling address, and "Prompt If Not Available" is for prompting if the calling address is not available (Default)
(3) **Prompt for Passcode:** Has the Portal prompt for a password once the user is identified
vii) Click **"OK"**

Your Votacall Anywhere will now be setup… for instructions on how to use it, please reference the separate Votacall Anywhere document provided by Votacall.

e) Music On Hold

Music on hold allows callers to hear music when a call is place on hold or parked. Music on hold can be configured as follows:
i) At the group level, go to **Services**
ii) Click on **Music on Hold**
iii) If you wish to edit the group level music on hold, click **Group**. If you wish to add a new departmental Music on Hold, click **Add**
iv) You will be brought to the following screen



v) To enable Music on hold, click the first check box (default checked)
vi) To enable Music during Park, click the second check box (default checked)
vii) To enable Music during Busy Camp On, click the third check box
viii) The Type of music can be defined by one of three ways:
(1) **System Defined Music/Video**: Default music that comes with your phone system
(2) **External source**: Music from a separate device on or off your network. If you wish to setup an external Music on Hold, please contact Votacall for assistance
(3) **Custom Music/Video File**: If you wish to add your own music, you may upload an audio file in the following format:
(a) CCITT u-Law or A-Law
(b) 8.000 kHz
(c) 8 bit Mono
(d) .WAV file Type
ix) To apply changes, click **"OK"** or **"Apply"**

3) User Functions

As the Administrator, you have the ability to edit all of the user accounts in your group (unless you are an administrator of a department, then you can only see users in your department). You will also have some control over users that individual users don't have. These next two sections highlight some of the more important Admin functionality that you will most likely come upon with some frequency.

a) Changing Usernames

Votacall sets up usernames for clients in a very systematic way. Sometimes those usernames are hard to remember or difficult to use. As Administrator of a group, you have the ability to change the login username of a user in your group. Any username change done on the portal will change login access for the employee's web portal, toolbar, call center client application, receptionist console, and call center supervisor application. Below is how to change employee's usernames

i) At the Group level click **"Users"**
ii) Either enter in the last name and press the search button or press the search button to populate all the users.
iii) Choose the user you wish to edit by clicking on their name or the edit button next to their name.
iv) Click **"Profile"**
v) Click the link labeled **Change User ID (Also saves current screen data)**
vi) Enter in the desired User ID and click **"OK"**

b) Changing Names

In order to change the name of the employee of a phone and their calling line ID, you must do the following:

i) At the Group level click **"Users"**
ii) Either enter in the last name and press the search button or press the search button to populate all the users.
iii) Choose the user you wish to edit by clicking on their name or the edit button next to their name.
iv) Click **"Profile"**
v) Enter in the **Last Name** and **First Name** of the new employee. Repeat entries in the **Calling Line ID Last Name** and **Calling Line ID First Name.**
vi) Click **"OK"** or **"Apply"**