



# PortaSIP® Media Server



# Administrator Guide

Maintenance Release



Documentation

©2000-2014 PortaOne, Inc. All rights reserved www.portaone.com

### **Copyright Notice & Disclaimers**

Copyright © 2000-2015 PortaOne, Inc. All rights reserved.

PortaSIP® Media Server Administrator Guide, January 2015 Maintenance Release 45 V1.45.04

Please address your comments and suggestions to: Sales Department, PortaOne, Inc. Suite #408, 2963 Glen Drive, Coquitlam BC V3B 2P7 Canada.

Changes may be made periodically to the information in this publication. The changes will be incorporated in new editions of the guide. The software described in this document is furnished under a license agreement, and may be used or copied only in accordance with the terms thereof. It is against the law to copy the software on any other medium, except as specifically provided for in the license agreement. The licensee may make one copy of the software for backup purposes. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopied, recorded or otherwise, without the prior written permission of PortaOne, Inc.

The software license and limited warranty for the accompanying products are set forth in the information packet supplied with the product, and are incorporated herein by this reference. If you cannot locate the software license, contact your PortaOne representative for a copy.

All product names mentioned in this manual are for identification purposes only, and are either trademarks or registered trademarks of their respective owners.

### **Table of Contents**

	Preface Hardware and Software Requirements Installation	
1.	System Concepts	7
	The Media Server's Role The Media Server Components	
	The Media Server Performance	
	Conceptual Elements	
	Managing IVR Applications via Web GUI	
	Auto-Attendant	
	Direct Access to Extension from Auto-Attendant	
	Dial-by-name Directory	
	Conferencing	
	Calling via Premium Number	
	Prepaid Card Application	
	Supported Services	
2.	Appendices	41
	APPENDIX A. Configuration Parameters for IVR Applications APPENDIX B. Voice Applications Settings	
	APPENDIX C. Balance Announcements	70
	APPENDIX D. Supported DTMF Methods APPENDIX E. Fax Transmission-Supported Codecs	71 71
	APPENDIX F. Supported Languages	
	APPENDIX G. IVR Flow Diagrams	78

# Preface

PortaSIP® consists of the PortaSIP® Switching Server and the PortaSIP® Media Server (formerly PortaUM®). This guide mainly covers the PortaSIP® Media Server; consult the **PortaSIP® Switching Server Administrator Guide** for information about the PortaSIP® Switching Server.

This document provides a general overview of the PortaSIP® Media Server (hereinafter referred to as the Media Server), a platform for the delivery of enhanced business and residential communications services. The Media Server provides various IVR applications and handles voice, fax, and regular email messages, which users can access via a web interface or by telephone.

### Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only, and does not always contain the latest material on enhancements that occur inbetween minor releases. The online copy of this guide is always up-todate, and integrates the latest changes to the product. You can access the latest copy of this guide at **www.portaone.com/support/documentation/** 

### Conventions

This publication uses the following conventions:

Commands and keywords are given in **boldface**



The **exclamation mark** draws your attention to important information or actions.

**NOTE:** Notes contain helpful suggestions about or references to materials not contained in this manual.



**Timesaver** means that you can save time by taking the action described here.

Tips provide information that might help you solve a problem.

### **Trademarks and Copyrights**

PortaBilling®, PortaSIP® and PortaSwitch® are registered trademarks of PortaOne, Inc.

# **Hardware and Software Requirements**

### **Server System Recommendations**

- A 64-bit processor (Xeon, Opteron). Additional processors are recommended for networks with a high call volume.
- A minimum of 500 GB of available disk space. On the average, 5,000 voice mailboxes take up about 1 GB of disk space, plus you need to reserve an amount of free space roughly equal to the projected database size for performing operations such as backup. RAID is recommended in order to improve performance and reliability.
- At least 8 GB of RAM, 12 GB recommended.

For additional details and configuration advice, see the *Hardware Recommendations* topic on our website: http://www.portaone.com/support/hw-requirements/

For information about whether particular hardware is supported by Oracle Enterprise Linux from the JumpStart Installation CDs, consult the related document on the Oracle or RedHat website: https://hardware.redhat.com/

### **Client System Recommendations**

- OS: Windows XP, Vista or 7, UNIX or Mac OS X
- Web browser: Internet Explorer 8.0 (or higher), Mozilla Firefox 3.6 (or higher)
- JavaScript and cookies enabled in web browser
- Display settings:
  - o Minimum screen resolution: 1024 x 768



# Installation

Jumpstart installation CDs contain installation media for Oracle Enterprise Linux (64-bit version), supplementary packages necessary for convenient system administration and maintenance, and all required software packages. After the installation is complete you will assign roles (e.g. RADIUS, web interface, PortaSIP®, etc.) to individual servers using the configuration server tool – this will automatically enable the required components of the PortaSIP® Media Server software on each server.

For detailed installation instructions, please refer to the **PortaSwitch Installation Guide.** 



# **1** System Concepts



# The Media Server's Role



The Media Server (Unified Messaging system) is one of the key components of PortaSwitch $\mathbb{R}$  – it is a platform which provides users with various IVR applications: balance info, auto-attendant, prepaid card calling, conferencing, voicemail, fax-to-email, and so on.

The Media Server handles voice, fax and regular email messages, which users can access via a web interface or by telephone.

# **The Media Server Components**



# The Media Server consists of the following main components

- A media server platform that provides IVR (interactive voice response), playing various voice prompts to users and then gathering users' input on the phone dial pad (DTMF) for menu navigation and entry of data such as credit card numbers. This component is also used to record voicemail messages and receive incoming faxes.
- A database server providing storage for all email, voice and fax messages, as well as the user's custom settings and voice prompts.
- An IMAP server which provides a unified interface for message retrieval and management, whether this is done from within the Media Server or by an external application (e.g. the user's Microsoft Outlook client).
- A web server to provide the user with web-based access to his mailbox.
- An SMTP server, used to receive incoming messages from other mail servers, as well as to send outgoing messages created by the user on the web interface, or when a message forwarding service is requested.
- A converter for converting audio and graphic attachments in messages received from the media server into formats compatible with the software available to end-users (e.g. Microsoft Windows operating system).





### **The Media Server Architecture**

### **The Media Server Performance**

While for PortaBilling® or the Switching Server the majority of resources are used during call initiation or call disconnect, the situation is different with the Media Server. The Media Server provides IVR services, and so all voice traffic must go through it. This means that while a call is in progress, hundreds of RTP packets must be processed each second with minimal delay, in order to maintain acceptable sound quality. This limits the number of concurrent calls a single Media Server can process. (Of course, you can scale up multiple Media Servers to achieve the required performance.)

On a server with the recommended configuration, a Media Server can handle about 1000 incoming IVR sessions (for applications such as auto attendant or balance info), or about 700 concurrent two-way IVR sessions, such as the prepaid card or callback applications, e.g. when there is an incoming call from a user to the Media Server and an outgoing call from the Media Server to an external destination.

Another limitation on the Media Server is the number of mailboxes the server can store. Each mailbox consumes a certain amount of disk space for data storage, and so the total amount of disk space used on the server quickly adds up. For instance, 20,000 users with an average mailbox size of 15 megabytes will require about 300 gigabytes of disk space. You can use quotas to set customers' maximum allowed mailbox size.

### **The Media Server Clustering**

When multiple Media Servers are installed as part of your PortaSwitch® system, they all connect to the same database which contains IVR application settings, voice mailboxes, auto-attendant menus and all other data required to operate a unified communication service. Thus the function of a media server (playing voice prompts to the user, collecting DTMF input, establishing an outgoing call, etc.) can be performed by any server in the cluster. Incoming calls will be distributed among all of the available Media Servers – this provides the ability to perform load sharing and increase your total IVR capacity. If one of the servers is down because of a hardware failure, the remaining servers will continue processing the call.

To enable quick service recovery on the IVR service in case the database is down – a stand-by database server can be used (similar to the PortaBilling $\mathbb{R}$  stand-by configuration).



Since the Media Server database contains unified communications data (including voice messages and faxes) for all customers – it may require a significant amount of disk storage space. At the same time, since most Media Server operations include only simple data retrieval, the disk access speed is not crucial. Because of this, if you provide unified messaging services to a large number of customers it is recommended that you avoid running the Media Server database on the same physical server that is



running the PortaBilling® master database – it is better to set up a separate server for this, using larger storage disks. You can potentially even use slower disks (7200 RPM) to reduce the total server cost.

### **Conceptual Elements**

### Mailbox

A mailbox is a portion of disk space on the Media Server which has been allocated for storing messages. Messages can be voice messages, faxes, or generic emails. You may set a quota (maximum allowed disk space) for user mailboxes, to prevent a situation where some users store too much information in their mailboxes, thus creating problems because the disk space is unavailable for other customers.

### **Access Number**

When a pre-defined number is dialed from any phone connected to PortaSwitch, or calls to this number are received from an external network – they are forwarded to the Media Server where an IVR application that is associated with this number is launched.

### **IVR Applications**

When the Media Server answers an incoming call, an IVR (Interactive Voice Response) application is deployed. This application defines how the call is to be further processed, i.e. what the user on the other end will hear. The Media Server IVR applications include, among others:

- Voicemail, allowing callers to leave a message which will be delivered to the user's mailbox;
- Fax-to-email;
- Auto attendant a custom-designed set of voice menus (see below for more details);
- Check balance / top-up account;
- Prepaid card;
- Conferencing.

Each application normally has a set of parameters which customize its behavior (e.g. whether the prepaid calling card application should announce the available balance or not). The PortaBilling® web interface is used to associate particular applications with a particular access number and then customize the parameters for further applications.

### **Auto Attendant**

The Media Server's auto attendant is a flexible utility designed to provide IVR for callers and allow them to navigate among different options by pressing keys on their phones. Auto attendant capabilities include simple features such as playing a certain voice prompt to the end-user or collecting his input, as well as more advanced features such as incoming fax detection or call queues.

# **Managing IVR Applications via Web GUI**

Using PortaBilling® web interface administrators can quickly and conveniently define how users access IVR applications by dialing phone numbers. Your customers would dial a phone number from the PSTN network or their IP phone to access a specific IVR application; for instance, \*98 for voicemail, 12125551234 to access a prepaid calling card IVR, or 18005559876 to access the audio conferencing facility. So when PortaSwitch® receives a call and matches the destination number with one of the access numbers – the call will be forwarded to the Media Server. The Media Server then will launch the specific IVR application associated with that access number.

6	II \$	00	• • • ~ Q		IVR	Applica	tions				? Help
•	🛨 Add	🖬 S	iave 📓 Save & Close	Voice Appli	cations Settings	S Close				M Logout	🖬 Log
					Applications			Search			
				ANY		•		Search			
		Edit	Access Nu	mber*		Name *		Applic	ation *	Delete	
			<u>*11</u>		Balance Informa	tion		Balance information		×	
			<u>*98</u>		Voice Mailbox			One's Own Voice Mai	Ibox Access	×	
			12125551234		Prepaid Cards			Prepaid card calling		×	
			12320		Premium A			Premium Numbers		×	
			18001255777		Calling Cards ar	nd Corporate	PINIess Dialing	Prepaid card calling		×	
			18005559876		Conference			Conferencing		×	
			18661234555		Prepaid Cards			Prepaid card calling		×	
			27113407200		Voice Mailbox rea	achable from	outside	One's Own Voice Mai	Ibox Access	×	
			271234567		Conferencing for	IP Centrex		Conferencing		×	
			5544%		Corporate PIN A	uthentication		Pass-Through IVR		×	

### **Application options**

The administrator can customize properties of the application that is running on a specific access number.



6	r I	II \$		<b>:</b>	Þ ~	1 0			I	VR	Appli	ications	;		() America/Vancouver	der	no	🕐 Help
•		🛃 Add	🖬 Save	🖃 S	iave & O	Close	Voice	Applications 9	Settings	8	Close					Mỹ Lo	ogout	🖬 Log
								App	lications				Search					
							ANY					T		Search				
		Edit		Acces	s Numb	ber*			Nan	ne '				Appl	ication*		Delete	
																۲		
		≡	12121234567			Conference				Conferencing				×				
			12320					Premium A					Premium Numbers				×	
			16047899001	L				Prepaid Card	S				Prepaid card calling				×	
			1800 255777	2				Calling Cards	and Cor	porat	e PINIe	ess Dialing	Prepaid card calling				×	
		Ξ	18661234555	i				Prepaid Card	s				Prepaid card calling				×	
		Ξ	27113407200	2				Voice Mailbo	x reachab	le fro	om outs	side	One's Own Voice Ma	ilbox Acc	ess		×	
		Ξ	271234567					Conferencing	for IP Ce	entre	ĸ		Conferencing				×	
		Ξ	<u>5544</u> %					Corporate PII	N Authen	ticati	on		Pass-Through IVR				×	
			¥															

₫	II \$	88	•	Þ	~ Q		IVR Appli	cations	America/Vancouver	demo	🕐 Help
•	🖬 Save		Save &	Close	🛞 Close	Reset to Default				► Logout	目 Log
	1					40047000004					1
				A V	ccess Numr bice Applica	tion Prepaid card calling					
					Routing	Instance Parameters	7				
				-	reducing						
						Option		Val	lue		
					ANI Authent	ication		$\checkmark$			
					ANI Transla	tion Rule		s/^0/ani44/	2		
					Use ANI an	d Auth Code					
					Minimum Ai	uth Code Length		4			
					Manual Aut	auti Code Lengui		4			
					PIN Transla	tion Rule					
					Auto Regist	ration					
					Auto Regist	ration Without Confirmatio	n				
					- Minimum C	ard Length		11	· · ·		
					Maximum C	ard Length		11	•		
					Maximum L	ogin Attempts		3	•		
					Authorize wi	ith IVR Session ID					
					Check Servi	ice Password		none	•		
					Minimum P	assword Length		4	•		
					Maximum P	assword Length		4			
					Languages			en,ru,de	2		
					Cont Langu	age List is Preferred					
					Brand Prom	ipis me Message					
					Restrict Cal	lis for Accounts with Low F	alance	disconnect			
					Minimum Vo	oucher Length	Jananioo	11	•		
					Maximum V	oucher Length		11	•		
					Announce E	Balance		<b>V</b>			
					Credit Acco	unts Balance Announcem	ent	backward compatibili	ty 🗸		
					Announce C	Credit Limit		<b>V</b>			
					Enable Self	-Care menu					
					Play an ann	ouncement about Self-Ca	re menu				
					Check Asso	ociated Number					
					Announce T	īme		<b>V</b>			
					Use Specia	I Access Code for First Ca	ills				
					Use Fixed A	Access Code for First Call	3				
					Separate In	coming Leg Cost					
					Bote By	containg Leg Cost		CLI			
					Incoming A	ccess Code Prefix		TN	•		
					No Charge	if Call Is Not Connected					
					Seconds Re	ounding Mode		none	<b></b>		
					Play Pre-rin	g MOH					
					Dynamic Re	- eauthorization					
					Music on He	old Class		ringtone			
					Disconnect	ion Warning Interval, sec		0	•		
					Repeat Eve	ry, sec		0	•		
					Type of Disc	connection Warning		beep	•		
	Dis		Disconnect	Call Before, sec		0	•				
					Maximum D	Dial Attempts		3	•		
				Premium N	umber Subscribe Comma	and					
					Premium N	umber SMS Number		[			
					Premium N	umber Deposited Amount					
						2					

#### **Distributing incoming IVR calls to specific Media Servers**

The administrator can also assign incoming calls on a particular access number to a chosen subset of available Media Servers (PortaUM nodes). The list of available servers – or groups of servers – can be prioritized so calls will first be handled by the server at the top of the list and then in descending order based on availability. A typical case scenario is when Media Servers are installed in multiple geographic locations and it is desirable to handle calls arriving from local telco partners on the Media Servers in a specific region.

₫		8	:	1	. ~ 0	0		IVR Applications	America/Vanc	couver demo	P Help
•	🖬 Sa	/e	📄 Save	& Close	e 🛞 Clos	e	Reset to Default			💵 Logout	目 Log
					Access N Voice App	imbe licat	r 16047899001 ion Prepaid card callir	a 			
					Rou	ting	Instance Parameter	s			
					Set Rout	ng	Manua	×			
					Add I	lode	Add Node	Pool			
						N	ode		Delete		
						Po	rtaUM (193.28.87.74)		×		

This will improve call quality by reducing network delay between the telco's originating gateway and the Media Server.

### **Call Scenarios**

### **Call between Subscribers on VoIP Network**

In this scenario a subscriber makes a call from his/her IP phone to a phone number that belongs to another subscriber on your VoIP network.





- User A dials 121 in an attempt to reach user B. A's SIP user agent sends an INVITE request to the Switching Server (1).
- The Switching Server performs authorization in the billing (2). For example, if A dialed 121, the billing will inform the Switching Server that the actual number is 12027810009, and that this number belongs to B (3).
- The Switching Server checks the registration database, but it appears that this account is not online at the moment. If B has Unified Messaging services enabled, the call will be redirected to the voicemail system, and A can leave a message for him (6). The same thing would happen if B were online, but did not answer his phone (4), (5).

# A Call from the Outside Network (Via a VoIP DID Provider)



- User C (connected to the phone network of some other telco) wishes to call user A. He dials A's phone number 12025550003.
- The call is routed through the telecom network of the carrier providing the services to C, and then possibly via some transit operators. Eventually the call is delivered to the DID consolidator X-Telecom, which supplies the incoming DID calls to the ITSP. From the switch of the carrier X-Telecom, the call is sent to the Switching Server.
- When an incoming call arrives to the Switching Server (1), after gathering the required information, the Switching Server sends an authorization request to billing (2).
- On the PortaBilling side, several operations are performed:
  - First of all, PortaBilling detects that this is a call coming from a "VoIP from Vendor" connection which belongs to X-Telecom.
  - Then PortaBilling checks whether the number 12025550003 is actually serviced on the ITSP network; this is done to prevent a situation when, either by mistake or intentionally, X-Telecom starts sending transit voice traffic to the ITSP network. Only if there exists an account (or account alias) with ID 12025550003, meaning that this number indeed belongs to one of the customers, will the call be allowed to proceed; otherwise the authorization fails and the call is dropped.
  - Then PortaBilling checks if account 12025550003 is currently listed in the shared database of registered IP phones and what the contact IP address is.
  - Also, since account 12025550003 has the "Unified Messaging" service activated, the Media Server is added to the list of call delivery routes.
  - Finally, the authorization confirmation, which includes A's current location (IP address and port), call forwarding or voicemail information and the maximum allowed talk time, is sent back to the Switching Server (3).
- The Switching Server starts the outgoing call to 12025550003 (4).
  - If A answers the call, the call is connected as usual. The Switching Server starts the timer, and will disconnect the call if the maximum call duration is exceeded.
  - If A does not answer his phone (5), or his phone is not registered at this time, then the call is routed to the Media Server.
- The Media Server connects the incoming call (6) and, based on the number called (12025550003), retrieves the configuration settings (language, customized prompts, personal greeting, etc.) for this mailbox.

- The "Voicemail" IVR application is started, which announces that the called party is not available and allows the caller to leave a voice message or send a fax.
- The voice message or fax is processed, converted and delivered to the user's inbox.

# A Call from the Outside Network (Using a Gateway)



This is an alternative, when calls made on the PSTN network to your numbers are routed to your gateway via the telephony interface.

- User C (connected to the phone network of some other telco) wishes to call user A. He dials A's phone number; since C is in the USA, he dials it in North American format, i.e. 2027810003.
- The call is routed through the telecom network to gateway GW-NY-01. When the incoming call arrives on the gateway (1), it starts a special TCL application to handle this call. This application does several things:
  - Converts the phone number to E.164 format, so that 2027810003 becomes 12027810003.
  - Performs authorization in the billing (2), i.e. checks whether A is allowed to receive incoming telephony calls from GW-NY-01 and, if you charge for incoming calls, what is the maximum allowed call time based on A's current balance (3). One important point is that authorization must happen without a password check, since the application does not know the valid password for the SIP account.
  - Starts the outgoing call to 12027810003.
  - When the call is established, it starts the timer, and will disconnect the call if the maximum call duration is exceeded.
  - The gateway is configured so that it knows that calls to 1202781.... numbers should be sent to the Switching Server. Thus it sends an INVITE to the Switching Server (4).

- PortaSIP receives the INVITE, but without authorization information. Thus the Switching Server performs authentication based on the IP address (5), (6). Since this call comes from a trusted node, i.e. gateway GW-NY-01, it is authorized.
- The Switching Server checks its registration database, but it appears that this account is not online at the moment. If A has Unified Messaging services enabled, the call will be redirected to the voicemail system, and C can leave a message for him (9). The same thing would happen if A were online, but did not answer his phone (7), (8).

### **IVR** Application



- The service provider wants to allow customers to access an IVR application (e.g. to check their voicemail from an external phone line). The number to be dialed by users (e.g. 18005555865 1800-555-5VML) is purchased from the DID provider.
- The administrator creates a new entry in the **Access Numbers** section in PortaBilling, assigning the "Voicemail Access (with PIN protection)" application to 18005555865, and configures the parameters of the application, if necessary.
- Customer C wishes to check his voice messages while out of the office; he dials 18005555865 from his cell phone.
- The call is routed through the telecom network of the cellular carrier providing the services to C, and then possibly via some transit operators. Eventually the call is delivered to the DID consolidator X-Telecom, which supplies incoming DID calls to the ITSP. From X-Telecom's switch the call is sent to the Switching Server.
- When an incoming call arrives to the Switching Server (1), the Switching Server checks the call handling rules to determine how this call should be authorized, i.e. based on the remote IP address or using the username and password. After gathering the required information, the Switching Server sends an authorization request to billing (2).
- On the PortaBilling side, several operations are performed:

- First of all, PortaBilling detects that this is a call coming from a "VoIP from Vendor" connection which belongs to X-Telecom.
- Then PortaBilling detects that there is an entry in the Access Numbers section which designates 18005555865 as a special IVR application number.
- This call will be forwarded to the Media Server, and none of the other call routing options (vendor connections, LCR, etc.) applies in this case.
- Finally, the authorization confirmation, which includes the routing list (with just the Media Server in it), is sent back to the Switching Server (3).
- The Switching Server routes the call to the Media Server.
- The Media Server connects the incoming call (4) and, based on the number called (18005555865), launches the "Voicemail Access" application.
- The application prompts the user to enter a mailbox ID (his phone number on the VoIP network) and PIN. Upon successful authentication, he can listen to his messages in the same way as he would from his IP phone

### **Auto Attendant**



• Customer B, using IP Centrex services, purchases an extra DID number (18005551234) to serve as his main office number. An account with ID 18005551234 is created and the "Auto-attendant" service is enabled for it. This account will not be provisioned on any IP phone, since the goal is to let the Media Server handle the call. The customer logs in to the self-care interface and configures the desired menu structure – which announcements should be made, which extensions/huntgroups calls should be forwarded to, etc.

- User C wishes to call company B. He dials B's phone number 18005551234.
- The call is routed through the telecom network of the carrier providing the services to C, and then possibly via some transit operators. Eventually the call is delivered to the DID consolidator X-Telecom, which supplies the incoming DID calls to the ITSP. From the switch of the carrier X-Telecom, the call is sent to the Switching Server.
- When an incoming call arrives to the Switching Server (1), the Switching Server checks the call handling rules to determine how this call should be authorized, based on the remote IP address or using the username and password. After gathering the required information, the Switching Server sends an authorization request to billing (2).
- On the PortaBilling side, several operations are performed:
  - First of all, PortaBilling detects that this is a call coming from a "Calls from Vendor via SIP" connection which belongs to X-Telecom.
  - Then PortaBilling checks that an account (or account alias) with ID 18005551234 exists, meaning that this number indeed belongs to one of the customers; otherwise the authorization fails and the call is dropped.
  - Since the account 18005551234 has the "Auto-attendant" service enabled, and this is not provisioned on any IP phone, the Media Server will be the only entry in the list of call delivery routes.
  - The authorization confirmation including the routing list (containing only the Media Server), is sent back to the Switching Server (3).
- The Switching Server routes the call to the Media Server.
- The Media Server connects the incoming call (4) and, based on the number called (18005551234), retrieves its configuration settings (e.g. auto-attendant activated for this number, voice prompts for menus, etc.).
- The auto-attendant IVR application starts up, plays the menu prompts (e.g. "Welcome to SmartDesign! Please press 1 for sales and 2 for technical support") and collects the user's input.
- If, after navigating the menu structure, user C chooses the option of being transferred to one of the extensions in the IP Centrex environment, the Media Server establishes a new outgoing call to the Switching Server (5).
- When an employee answers the call on that extension (6), the Media Server connects this call portion with the incoming call from user C directly, and is not involved in any further processing of this call (thus resources are free to process other calls).

# **Auto-Attendant**

### **Basic Concept**

- The Media Server's auto attendant is composed of a set of menus.
- All the menus are identical in every respect, except for the ROOT menu, which is always present and cannot be deleted, and whose name cannot be changed.
- When a caller dials the system, auto attendant will answer (connect) the call and proceed to the ROOT menu.
- If a user tries to access a menu which is not currently active, the action specified in the **Not Active** configuration parameter will be performed; for instance, the user may be automatically forwarded to an "after hours" menu.
- The **Intro** prompt (e.g. "Welcome to PortaOne, a VoIP solutions company!") is played when a user enters a menu for the first time.
- After this, the **Menu** prompt will be played, listing all the available options (e.g. "Press 1 for sales, press 2 for technical support"), and auto attendant will collect the digits dialed by the user on his phone touchpad.
- If no input is received (timeout), the **Default** prompt is played as many times as specified and the dialog reverts to the previous step (i.e. plays the **Menu** prompt and collects the user's input).
- The user's input will be matched with the corresponding menu items, and the action associated with this item will be performed. The following actions are possible:
  - Default Plays the Default prompt from the current menu and returns to the "Play Menu prompt" step (this is the action used for all menu items where the initial value has not been modified).
  - **Transfer** Transfers the call to a given telephone number or extension. The phone number should be entered in the same format as the customer would use to dial it from an IP phone in his IP Centrex environment; for example, to transfer a call to extension 123, simply enter 123.
  - **Transfer to E.164 Number** Transfers the call to a given number. The number should be specified in E.164 format: the country code, followed by the area code, and then the number (e.g. 16045551234 for Canada).
  - **Transfer to Extension** Transfers the call to an extension number entered by the caller from his phone. To prevent abuse (e.g. someone attempting to enter a long-distance number in this way), you can specify the maximum allowed number of digits in an extension (**Max Size**).

- **Transfer to Voicemail** Switches to voicemail mode. This should be designated as an action for the "Fax" event, in order to allow storage of received faxes.
- Menu Transfers the user to the selected menu.
- **Directory** Launches this company's dial-by-name directory.
- **Queue** Transfers the call to the specified call queue.
- You may select whether the corresponding **Before Action** prompt is to be played prior to the action.
- A call menu flow chart is shown in the diagram below.

### **Call Menu Flow Chart**





Detailed information on how to configure the Auto-Attendant is provided in the **PortaBilling Account Self-care Interface guide**.

# Direct Access to Extension from Auto-Attendant

In addition to the existing mode that requires an end-user to select a "Dial extension" action first, you may set up direct dialing for the extension from the Auto Attendant. For example, when a customer wants to contact a personal manager, he dials the company's corporate number (e.g. 18005559876) and the manager's extension (e.g. 301, found on the manager's business card). The customer dials 18005559876 from his mobile and reaches the corporate menu, which offers to initiate a call with, e.g. sales by pressing "1," or the support dept. by pressing "2" or by directly dialing the extension. The customer may now dial "301" without having to listen to all of the options and the call to his manager will be immediately initiated. If the manager is unavailable, the call may be redirected to voicemail (if such an option is activated).

To configure the Direct Access to Extension from Auto-Attendant, follow the steps below:

1. Create the required extension (for example, 301 for account 8002204902).

奋		88 🛉	P ~ 4	l.	Edit Custom	er 'l	EasyCall L	td'					demo	
•	<ul><li>Add</li><li>Tern</li></ul>	8 Clos	e 🗏 xDRs 🚻 Batc	hes 💩 Sites	🗊 Accounts 🔓	E-P	ayments Log	🔲 Invo	pices	🖪 Out-Of-1	urn Inv	oice	▶¶ Logout	目 Log
Cus	tomer ID	EasyCall	td	• <u>Cu</u>	istomer Class	Defa	ault customer	class	•					
				Ba Ba Cu	Ilance Control Ilance Irrent Credit Limit	Postp 2478. 3000.	paid .26584 USD .00000 USD							
Li	fe Cycle	Taxation	Abbreviated Dialing	Subscriptions	Volume Discount	ts Ti	rouble Tickets	Notepa	ad Se	ervice Config	uration	Permit	ted SIP Proxies	1
	Address I	nfo	Balance Adjustments	Web Self-Care	e Additional I	Info	Payment In	fo	Auto-P	ayments	Exten	sions	Huntgroups	
Edit	Extens Numbe	ion er*	Extension Name	Assigned Acco	ount	Prim	ary Group		Delete					
								Ŧ						
≡	1541	Bo	b Davies	16041235003					×					
	E 2678 John Doe		16041235004					×						
	301 Jhon (Dedicated Manage		)) 8002204902					×						
	7755	Mi	chael Turner	16041235005					×					

- 2. Set up the Auto-Attendant option for a number (for example, 8002204900).
- 3. Add the action "Dial extension directly" for event 3.



🙆 🗈 🛛				Add Menu							😢 Help
🕨 🖬 Save	🖃 Save & Close	🛞 Close								N Logout	
Name	Corporate num	ber									
				Wizard							
Intro					Mer	nu					
Custom	🕤 🕨 🔍 Brox	wse No f	le selected.		Cus	stom	0	•	Browse No	file selected.	
None	۲				Nor	ie	۲				
Timeout					Una	availab	le				
Custom	🕞 🕨 😑 🗠 🛛 Brow	wse No f	le selected.		Cus	stom	0	0	Browse No	file selected.	
Standard	•				Star	ndard	۲				
	Caller Will Hear						Са	ler Will is selec	Hear tion is not avai	able	
Replay Menu	3 times										
Event		Action		Destination	Max Size	Play	Before	Action		File	
Not Active	Unavailable		•				•	⊮')	Browse N	o file selected.	
1	Unavailable		•				•	€)	Browse N	o file selected.	
2	Unavailable		•				•	кJ	Browse N	o file selected.	
3	Dial extension dire	ectly	-	<b>*·</b> -·-			•	⊾)	Browse N	o file selected.	
4	Unavailable		•					K)	Browse N	o file selected.	
5	Unavailable		•				•	⊮)	Browse N	o file selected.	
6	Unavailable		•				•	⊾)	Browse N	o file selected.	
7	Unavailable		•				•	кJ	Browse N	o file selected.	

4. When calling 8002204900 and pressing 301, the call will be immediately redirected to John (8002204902).

**NOTE:** The feature is feasible when an extension number starts with the same digit as the "Dial extension directly" option (e.g. 3). Dial 301 but not 3-301, otherwise the extension won't be found.

### **Call Queues**

This feature allows you to provide a "call center" functionality to your IP Centrex customers. When a large number of incoming calls from customers arrive to the auto attendant, PortaSIP® can forward these calls to the actual agents (customer service representatives) in a regulated fashion.

Consider the following example:

A broker company receives a lot of calls from its clients. To retain all incoming calls *and* give full attention to all their clients, the company's administrator creates the call queue "Sales" and assigns it to the Sales department.

So, when a client reaches the company and is transferred to the "Sales" department, he is placed on hold and waits for an agent to become available and accept the call.



The whole Call Queue configuration is performed at the customer level (on the **IP Centrex** tab of the Customer Self-care interface):

Customer Self-Care Portal												
Balance: 0.00 USD			Wet	Interface Language: en - English	Get VoIP., Inc ( Login: getvoip )	🛅 Logout 👻						
🔡 Dashboard	My Profile	👔 IP Centrex 🛛 📔	Billing Information									
Call Queue Edit						😡 Help						
	6)											
🙀 General	Call Queue Name	Sales										
Extensions	Huntgroup Number	: 100 👻										
Phone Lines	Marchan March and	-										
🛞 DIDs	Unconnected Calls	15										
Abbreviated Dialing												
Dialing Rules	Call Duration	3										
▷ Jas Incoming Calls	Announce Number o	f 🕑										
ell Call logs	Callers Ahead	:										
A Huntgroups	Announce Estimate Wai	<b>2</b>										
🍇 Call Queue 🛛 🚛 🖿 📟	Time	:										
An Identity	Music on Hold	Music on Hold	A Browse									
	🔚 Save 🛛 💭 Back											
		@ 2001-2014 Por	taOne, Inc. All rights reserved.									

Every call queue contains several configuration parameters:

- Call Queue Name Objective name of the call queue
- Huntgroup Number When creating a new call queue, a customer will need to select a huntgroup number (i.e. a common dialing code for multiple extensions). When a call arrives at the call queue, it is transferred to the corresponding huntgroup.
- Maximum Number of Unconnected Calls This defines the maximum number of calls that can be placed on hold within this queue.
- **Call Duration** The average expected processing time for each call (used to calculate the estimated waiting time).
- **Music on Hold** A melody (or announcement) which is played to users waiting to be connected.

Each call queue contains a pool of incoming calls (users trying to get connected) and a number of connected outgoing calls (calls that have already been connected to agents). When a new incoming call arrives, it is assigned a position in the queue. The caller will hear an announcement about his position in the queue and the estimated waiting time, which is calculated as (average call duration) / (maximum number of connected calls) \* (total number of users before him in the queue). After that, the specified "music on hold" is played, and every minute the caller is updated as to his current position in the queue and the estimated waiting time.

If there are callers on hold and the number of connected outgoing calls is lower than the number of available agents, the Media Server will attempt to connect the first person in the queue. A call invitation is sent to the destination number in the Switching Server, and the Media Server waits until the call is answered by the other side. If the call is not connected on the first attempt (some representatives may not be available at the



moment), the Media Server will make another attempt, then another one, and so on. This will continue until either all of the incoming calls are connected, or all agents get busy. In the latter case, the Media Server will simply wait until one of the agents finishes serving his current customer, thereby disconnecting one call and making "room" for a new outgoing call.

### **Dial-by-name Directory**

This is another element of the auto attendant IVR functionality. If a caller does not know the extension number of the person he is trying to reach, he may look up the called party using the first three letters of his surname.

					Customer Self-	-Care Portal				
Balance: 2,478.27 USD					Credit Li	imit: 3,000.00 USD en -	English	✓ EasyCal	Ltd (Login: EasyCall)	🔒 Logout 👻
and Dashboard	8 M	1y Profile		Ę	iP Centrex	Billing				
Extensions										() Help
203 General	~	Edit	Configure	Extension Number	Extension Name	Assigned To Phone Line	Primary Group	Published	Recorded Name	Delete
NNN Extensions		-	1	1541	Bob Davies	16041235003	-	~	Not Set	×
Phone Lines			1	2678	John Doe	16041235004		~	Not Set	×
Abbreviated Dialing		<b>;</b>	1	301	Jhon (Dedicated Manager))	12125412365	-	_	Not Set	×
A Incoming Calls Outgoing Calls		-	1	7755	Michael Turner	16041235005	-	~	Not Set	×
() Call Recording 볼 Huntgroups 실 Identity 《 Music On Hold										
		🔘 Ad	ld Extension	4 4   Pa	ge 1 of 1 🕨 🕅	11 2				1 - 4 of 4

There is a single, unified dial-by-name directory for each IP Centrex environment. Basically it is linked to the list of extensions, and so when creating an extension you can mark it as "published" so that it is included in the dial-by-name directory, and upload voice prompts with the person's name. You may also exclude certain extensions from being accessible via dial-by-name (e.g. you do not want tele-marketers to directly reach your CEO or CFO because their names are publicly accessible).

The dial-by-name directory can be assigned as an "action" item to any element in the ROOT menu or sub-menu. When a user reaches the dialby-name dialog, he will be prompted to enter the three first letters in the called party's surname. Standard phone mapping is used, i.e. 2 is ABC, 3 is DEF, and so on. If no matching person is found, the user is informed of this, and may then re-enter the name or press \* to exit. If more than one match is found (e.g. there are two persons with the "same" surname in the company, e.g. 276 will match both Brown and Asok), the user will hear a list of matching names and their extensions, and may then enter the correct extension.

# Conferencing

### **Conferencing Server Architecture**

As part of the PortaSIP® solution, the conferencing server enables your customers to use voice-conferencing services. Multiple customers can use this service simultaneously on a single server, and each of them will have access to his own set of virtual conference rooms. The customer can manage his conferences (virtual conference rooms) via the UM self-care interface.

A conference can be scheduled for a specific time, or a continually functioning conference (meeting room) can be created. Each conference is identified by a pair of unique access codes (one for the conference host, the other for conference guests). Although multiple conferences can be created on a Media Server, its resources are only used when a conference is in progress (i.e. at least one participant is in).



When a customer makes use of the conferencing facility, the PortaBilling® administrator assigns a separate tariff for the conferencing service in the customer's product configuration, and the owner of the meeting room is then billed for each incoming call in a conference session. For example, if your conference rate is \$0.03/min, and a customer organizes a conference for two participants where he (the host) stays connected for 30 minutes and his two partners stay connected for 25 and 20 minutes, respectively, then there will be three charge transactions in total: \$0.90, \$0.75 and \$0.60. To prevent potential service abuse by guests, customers may create a moderated conference. In this case, guests can only participate in a conference when the host has already joined it.

Conferencing server carries out intensive calculations when mixing the audio from several meeting participants, and so requires significant amounts of CPU power. This is why, if you plan to use the conferencing



service extensively, you should consider allocating an additional Media Server just for running the conferencing service, so that your other IVR services (voicemail, auto-attendant, self-care, etc.) can run properly.

### **Call Flow**



- The service provider wants to allow customers to access the audio conferencing service. The number to be dialed by users (e.g. 18665552637 1866-555-CNFR) is purchased from the DID provider.
- The administrator creates a new entry in the Access Numbers section in PortaBilling, assigning the "Conferencing" application to 18665552637, and configures the parameters of the application, if necessary.
- When a customer signs up for the conference service, an account conf1234 for managing the service is created in PortaBilling® and provided to the customer. The customer then logins into their UM self-care interface and creates specific conferences (virtual meeting rooms).
- The customer distributes the conference access information (access phone number and access code) to intended participants of the conference.
- A participant (connected to a network of some other telco) wishes to join the conference; he dials 18665552637 from his cell phone.
- The call is routed through the telecom network of the cellular carrier providing the services to the participant, and then possibly via some transit operators. Eventually the call is delivered to the DID consolidator X-Telecom, which supplies incoming DID calls to the ITSP. From X-Telecom's switch the call is sent to the Switching Server.
- When an incoming call arrives to the Switching Server (1), the Switching Server checks the call handling rules to determine how this call should be authorized, i.e. based on the remote IP address or using the username and password. After gathering the required information, the Switching Server sends an authorization request to billing (2).
- PortaBilling® detects that there is an entry in the Access Numbers section which designates 18665552637 as a special IVR

application number. The authorization confirmation, including the routing list (containing only the Media Server), is sent back to the Switching Server (3). The Switching Server routes the call to the Media Server.

- The Media Server connects the incoming call (4) and, based on the number called (18665552637), launches the "Conferencing" application.
- The application prompts the user to enter the conference access code and validates it in the internal database (5).
- If a valid conference code is provided, the ID of the account that owns this conference room (conf1234) is retrieved. An authorization request is sent to PortaBilling (6) to check that usage of this particular conference number (18665552637) is allowed for this account and that the account has sufficient balance to cover the costs.
- If authorization is successful, the participant is allowed to join the conference.
- When the participant hangs up, an accounting request is sent to PortaBilling (7), so the account conf1234 (and the customer who owns it) are charged based on price per minute associated with this access number, and the call duration.

### **Codec Licenses**

Normally, a media server (such as the one used in PortaSIP®) will send pre-converted voice prompts to the user as a byte stream, so that no codec licenses are involved. In the case of conferencing server, however, the audio-stream with the voice of each participant has to be decoded in real time, and then sent back to each participant as an encoded audiostream with the mixed sound. Prompts used should be available in both g711 and g729 formats (the media server chooses the most suitable format for each specific call). Thus, if commercial codecs (such as g729) are used, a codec license is required for each voice channel being used simultaneously. The conferencing server license does not include any codec licenses, and customers should procure such licenses independently.

### **Required License Calculation**

- If none of the conference participants use a g729 codec, then no g729 transcoders are required.
- If at least one of the conference participants uses a g729 codec, the number of required g729 licenses must be equal to the number of conference participants and then multiplied by 2 plus 1. For example, if you have 10 conference participants, but only 5 of them use a g729 codec, the number of required g729 licenses will be equal to 21.

### **Video Conferencing**

PortaSwitch® supports video conferencing so that during the video conference all participants can see the other participants in the conference.

This technology is useful for business customers because it offers them the opportunity to hold meetings, conferences, presentations and trainings remotely, without the need for all parties to be in one single location, thus saving time and money. Apart from the business sphere, this service can be useful in other life situations: for education, medicine, mass media, and of course, for personal use (e.g., communicating with distant relatives).

Video conferencing services provided by PortaSwitch® are manageable by the end user via the UM Self-care interface. Aside from the options available for audio conferences, the user can record a welcome video to be displayed during the authentication or Music on Hold. Video conferencing users can open the OSD (on-screen display) menu by pressing the **#** key on the phone keypad. The OSD menu provides a list of conference participants and instructions for how to switch among them.

Video conferencing service supports video in CIF (352\*288) resolution and one of the most commonly used video codecs – H.264. PortaSIP serves as a multiplexer, so each participant can choose a specific video stream to watch and only that stream is sent to them - this optimizes bandwidth usage. Since entire video streams are switched / duplicated and no actual video content conversion is done - that translates to high performance (a single PortaSIP server can support up to 50 simultaneous video streams) with no additional costs for codec licenses.

### 2nd number service

Customers whose businesses receive many incoming calls may want to have one or more additional contact numbers for those purposes that are separate from their existing home or personal mobile numbers. At the same time, they may still want to be able to answer incoming calls to those numbers using their home or mobile phones. PortaBilling® now allows you to provide a so-called 2nd number service to satisfy those requirements.

Let's take a look at the following example:

• A customer with the mobile phone number 42073723123 buys a 2nd number service from you.

- You allocate another number for him, e.g. 42027777100, from the DID range and create an account in PortaBilling® that represents that phone number.
- Add the alias 42073723123@pstn (the "Allow authentication/registration" flag should be disabled for this) to the account 42027777100 to associate the customer's external phone number with the DID.
- Set the default answering mode to "Forward then voicemail" for this account.



### Listening to voice mail and making an outgoing call

- From his 42073723123 mobile (1), the customer dials the phone number 42027777100 that was provided to him.
- The Switching Server sends an authorization request to billing (2).
- He is authorized by ANI 42073723123, and since 42073723123@pstn is an alias of the number dialed, the call is treated as an incoming call to the user's own mailbox.
- The authorization confirmation, including the routing list (with just the Media Server in it), is sent back to the Switching Server (3). The Switching Server routes the call to the Media Server.
- The Media Server connects the incoming call (4) and launches the "Voicemail Access" application.
- The customer can listen to messages the same way he would from his IP phone.
- If, after navigating the menu structure, the customer chooses the option of making an outgoing call, he will be prompted to input the destination.
- Customer inputs 420273333444.
- The Media Server sends an INVITE request to the Switching Server (5).
- The Switching Server sends an authorization request to billing (6).
- Billing sends an authorization response to the Switching Server (7).



• The Switching Server sends the call (8) to 420273333444 (the party being called will see 42027777100 as the CLI).

#### **Receiving an incoming call**



- From PSTN (42075553333), the user dials (1) customer's number: 42027777100.
- The Switching Server sends an authorization request to billing (2).
- The account for ANI authentication is not found and the call is treated as an incoming call to the 42027777100 account. PortaBilling® recognizes that this account has Follow-me services enabled, and produces a list of routes, accordingly.
- The authorization confirmation including the routing list (with the Follow-me number and the Media Server in it), is sent back to the Switching Server (3).

The Switching Server redirects the call (4) to a Follow-me number (customer will see 42027777100 as the CLI). If the call is not answered it will be redirected to voicemail (5), and the user can leave a message.

### **Calling via Premium Number**

Service providers can significantly increase their customer base by allowing subscribers of any other telco operator in the country to make cheap international calls via the service provider's network without any initial registration. Providers do not need to print and distribute calling cards or top-up vouchers; customers do not have to make a contract, perform online sign-up or purchase a card beforehand. This drastically simplifies the customer acquisition process and reduces associated costs.

A person can call a premium number that is registered on your network from his existing mobile phone or landline. For this call he will be charged by his operator according to the rate you assign to that particular premium number. In return, you can enable outgoing international calls to any of the destinations where your cost is lower than the revenue from the premium number. For instance, if you set the rate for premium number 9001234567 to \$0.10/min, you can allow calls made to any destination where you pay your vendors less than \$0.10/min to terminate the call. There is no need for the end-user to be provisioned in your system, you do not need to generate an invoice or request a payment: the telco, which "owns" the end-user, will collect the funds from the end-user and then forward that amount (minus commission, if applicable) to you.

Usually there are several "tiers" of pricing – e.g. the price of calling landlines in most European countries is about the same, but the price of calling a mobile number in those countries is significantly higher, and some exotic destinations may even be more expensive. Multiple premium access numbers are utilized to address this, so for each group of countries / destination that fall within the same pricing tier, the end-user can be offered a premium number with a competitive price (while this price will still be higher than the average termination price in the group). For instance, the end-user can utilize a premium number with a \$0.20/minute price to call landlines in Europe, and another premium number with a \$0.50/minute price to call mobile networks in Europe. In the tariff for each premium number the administrator will put:

- Ordinary rates for destinations that customers can call (the price that the end-user pays to call a premium number is sufficient to cover the outgoing call there).
- Destinations that are too expensive to call using this premium number are listed in the tariff as "forbidden." Nonetheless, price per minute information is still included in those rates and plays an important role. It suggests a per-minute rate for a premium number to call those destinations. This price will be used to search for the number that can be used to call those destinations from among all of the available premium numbers.

Let's assume the average termination cost for destination 442 (UK-London) is \$0.12 and for 447 (UK Mobile) it's \$0.22. There are two premium numbers, 12320 and 12350, with per minute rates of \$0.20 and \$0.50, respectively. Each of these numbers is configured in the Access Numbers section and the price per minute is set in the "Access Number Price" attribute. There are two separate tariffs, A and B – each linked to one of the numbers (see the examples in the PortaSwitch® Unified Communications handbook for detailed configuration examples). In tariff A, associated with the 12320 number, the service provider will enter the rate for 442 as normal, so users are allowed to make calls to UK-London via this number. The rate for 447 is marked as "forbidden" since otherwise, the service provider would lose money (the \$0.20 price per minute that the customer pays for the call to the 12320 number is less than the provider's cost of \$0.22). So customers are "forbidden" from calling the 447 (UK-Mobile) destination with that premium number. In the "Price" attributes of the rate for 447 the administrator enters \$0.50, which means that the customer will be advised to use the premium number at the \$0.50 price per minute rate.





According to our example, that would be the 12350 number. The 12350 number has tariff B associated with it, and tariff B's rates are "normal" for both destinations, so either destination can be called by the customer using that 12350 premium number. This offers additional flexibility to the service provider since different destinations can be mapped using either the more or the less expensive premium numbers.

#### **Call Flow**

- A user dials a premium number from his mobile phone or landline, the call arrives to the Media Server. The end-user is prompted to enter the destination number.
- The Media Server attempts to authorize a call to this number using PortaBilling®.
- If PortaBilling® confirms that calling that destination using this premium number is allowed, the Media Server will connect the outgoing call.
- If PortaBilling® rejects the request (the destination is marked as forbidden in the tariff), the Media Server will retrieve the price per minute entered in the forbidden rate this is the "suggested" rate that we should collect for a call. Then the Media Server will search for a premium number IVR among the list of configured access numbers that has a "price per minute" attribute with the same value as the suggested price.
  - If an access number is found, the user will be informed that in order to complete the call he should use that premium number – the number and the rate for it are announced.
  - Otherwise the user is informed that a call to that destination is not possible and is advised to contact customer support for further assistance.

### **Prepaid Card Application**

Prepaid services enable Internet telephony service providers (ITSPs) to offer calling card services that customers can pay for in advance.

The market for prepaid services includes tourists, immigrant communities, mobile populations such as military personnel, and people with limited credit histories who cannot otherwise get a private telephone line in their homes. These users can all gain immediate access to long-distance or international calling services from wherever they are located by using prepaid calling cards purchased at supermarkets and other types of retail outlets.

### Separate Charge for Incoming Leg in the Prepaid Card Application

Incorporating incoming leg costs into the price of an outgoing call works well when there are just a few different cost levels for an incoming call leg (e.g. zero cost for local access numbers and \$0.01/min for toll-free). If there are variations in incoming call costs (e.g. price differences between toll-free numbers and access numbers from different parts of the USA, or costs that depend on origination locations), then the number of required outgoing tariffs grows quickly and becomes hard to manage. That's why PortaBilling® provides separate pricing for incoming (calls to an access number) and outgoing (calls to a final destination) call legs in the Prepaid Card Calling Application. Two xDRs will be generated for such a call: one with a charge for the incoming call leg (leg A) and the other with a charge for the outgoing call leg (leg B.)

You may find out how to configure the prepaid card application to apply a separate charge for incoming call legs in **APPENDIX F. Separate Charge for Incoming Call Leg** in the Prepaid Card Application of the Prepaid Services handbook.

This feature allows you to manage prices for calling card services without administrative overwhelm, improve product price lining and thus increase your revenue.

### **Supported Services**

#### Leaving voice messages for a PortaSIP® user

The Media Server gives your SIP customers an automatic answering machine whenever they are not online or do not answer within a certain (configurable) time period. This service works when a call comes from


PSTN, as well as when it comes from another SIP customer. See the **Call Scenarios** section above for detailed call flow descriptions.

#### **DISA functionality for One's own voice mailbox access application**

When a customer accesses an IVR application to check his voicemail he may also want to make an outgoing call right away (e.g. to call back the person who left the voicemail). The customer can make an outgoing call from the voice mailbox by simply choosing that option from the application menu.

#### **Fax-to-email services**

In addition to voice messages, UM-enabled SIP customers will be able to receive faxes on their "answering machine". When a call is connected to the Media Server and the remote party initiates a fax transmission, the Media Server automatically detects this event and switches into fax receiving mode. The fax will be processed and then delivered to the user's mailbox as a .PDF or .TIFF document attached to an email message.

#### Sending email messages to a PortaSIP® user

The Media Server also allows your SIP customers to have regular email accounts, where they can receive regular emails.

#### **Retrieving voice and email messages using a SIP phone**

Your SIP customers will be able to retrieve their messages using a SIP phone. To do this, they must dial a special number, which transfers them to the Media Server IVR menu. This menu allows them to listen to recorded messages. Additionally, for SIP phones that support a message waiting indicator (MWI), the Media Server can automatically manage the SIP phone's MWI status, so that the user is notified when he has new messages.

#### **Retrieving voice messages, email messages and faxes** using a web browser

Users can retrieve their messages and send regular email messages using a standard web browser. The advanced Java applet built into the interface allows users not only to listen to voice messages, but also to compose new voice messages (a microphone is required). It is also possible to access the system using any email client that supports the IMAP or POP3 protocols.

#### Forwarding messages to an external email server

When a new message arrives in the Media Server message storage, a full copy of the message, or just a short notification, can be sent to the user's



other email address (e.g. corporate mail server or private gmail account), depending on the user's preferences.

#### Managing personal UM settings using a SIP phone

In addition to retrieving messages, your SIP customers can manage their personal settings, such as greetings, from a SIP phone using the Media Server IVR menu.

#### Managing personal UM settings using a web browser

Users are also able to manage their personal settings by logging into the UM self-care interface. The advanced Java applet built into the interface allows users to record personal greetings (a microphone is required).

#### Managing user's current balance

PortaSIP® users can listen to the current state of their accounts by using the IVR menu. Also, they can hear their current balance by dialing the access number for their mailbox and pressing option "0." There is also an IVR menu enabling the use of vouchers to add funds to an account. In *APPENDIX B. Balance Announcements*, there are balance announcement examples for different IVR configurations.

#### **Balance top-up**

When your customers' balance has gotten too low, remind them that it is necessary to refill it.

This can be done in the following way:

- Select the **Play an announcement about self-care menu** and **Enable self-care menu** check boxes;
- Select None in the Restriction for Calling with Low Balance;
- The acceptable balance level is specified in the **Breakage** field of the product;
- Your users will hear the **"Your balance is low, please refill your account soon"** prompt and they can refill their balance within the **self-care IVR menu** by pressing the **# key**.

#### **Prepaid card IVR**

The Media Server includes an IVR system that allows you to offer a prepaid card service for incoming VoIP calls. This IVR supports all the PortaBilling® extensions for the prepaid card application (access codes, real and announced call duration, and so on).

#### **Auto attendant**

Every user can program his own set of menus for auto attendant, from a simple message such as "I am on vacation right now, press 1 to connect to my assistant" to a complex menu system with various options for small or medium-sized businesses. Users can program the voice dialog from their web browser, record voice prompts using a microphone on their PC or upload professionally recorded prompts, create multiple sub-menus and define an activity period for each of them, program their company's dial-by-name directory, construct multiple call queues, and so on.

#### **Registration for PINIess Dialing Service via SMS**

This is an extension to the "classic" PINless dialing service, in which the user is identified by his caller ID (ANI/CLI), maintains a balance in PortaSwitch® and is able to call any destination with charges applied to his balance. Traditionally, the registration for PINless dialing service is performed by the end-user via the purchase of a top-up card and then calling the special IVR. When the user's balance is low, he needs to buy more top-up cards or pay his bill online. The registration via SMS (simply send an SMS message to a certain number) is an easier alternative. A simplified registration process and further management of the account make this service especially convenient for users of mobile networks. The service provider has two options for collecting funds from the end-user:

- Send a request to the mobile operator that the end-user is connected to for a balance transfer. This option must be supported by the mobile carrier its advantage is that any "ordinary" number can be used by the customer for sending an SMS.
- Establish a premium number where the end-user can send an SMS. Just like calls to premium numbers are charged differently than normal calls, messages to premium numbers are charged according to the higher rate (set by the service provider who owns the number). So for each message sent by the end-user, the mobile carrier will collect the money from the end-user and then pass it to you as the owner of the premium number.

To start using the service, the end-user simply sends an SMS with the message SUBSCRIBE to the registration number. Upon receiving the message, the SMS processing module in PortaSwitch® automatically provisions his account with the CLI/ANI of the mobile phone as the authentication ID; requests a balance transfer from the mobile operator and then adds these funds to the customer's balance in PortaSwitch® so they can be used again in the future. End-user will receive an SMS that confirms the service activation and provides important service information, such as the number to call for PINless dialing or a username/password for accessing the web self-care. Once that occurs, the

end-user can start using the service by dialing the access number and then entering the final destination number. The entire registration process is very easy to perform and can be completed in just a few seconds. PortaSwitch® can also perform an automated balance top-up: when the balance of the created account goes below a specified threshold, the system initiates another balance transfer from the user's balance on the mobile network. The telecom client can disable this automatic recharge by sending an SMS to the SMS access number with the message STOP.



# **2** Appendices

# **APPENDIX A. Configuration Parameters for IVR Applications**

Field	Description
ANI	If <b>ANI Authentication</b> is turned on, the IVR
Authentication	application will attempt to authenticate the customer's
	phone number (ANI). If authentication is successful, the
	IVR does not ask for a PIN.
ANI Translation	Caller identification (ANI or CLI number) is usually
Rule	delivered in the "local" format, without the country code,
	etc., e.g. 021234567. In this case, you need to translate
	the number into a unified format so it will match the ID
	of the billing account. The recommended format is a
	non-numeric prefix followed by an E164 number. In our
	earlier example, assuming that the country code is 44, we
	applied ANI Translation Rule s/^0/ani44/ to obtain
	"ani4421234567" as the authorization ID. This allows
	you to manage numbers from different countries (so they
	will not overlap) and the "ANI" prefix will ensure that
	these accounts are not confused with the actual phone
	numbers provisioned for on IP phones.
Use ANI and	This feature enables service for enterprise customers
Auth Code	when multiple individuals place outgoing calls using the
	same caller number (typically from the company's main
	phone line).
	The IVR application finds the customer's phone number
	(ANI) and his Company ID (in this account's associated
	number field) and collects the user's Authentication
	Code. The call is then authorized and billed to the
	account with an ID consisting of a <i>Company ID</i> followed
	by the # sign and the Authentication Code, e.g.
	534564#555.
Minimum Auth	The minimum number of characters the authentication
Code Length	code consists of. By default: 4.
Maximum Auth	The maximum number of characters the authentication
Code Length	code consists of. By default: 4.
Manual	If <b>ANI</b> authentication is disabled or fails for some
Authentication	reason, users will still be able to authenticate their
	identities by using their PIN numbers when this option is
	enabled.

## **Prepaid Card Calling**



<b>PIN Translation</b>	When the <b>Check Service Password</b> option is enabled
Rule	and the <b>PIN Translation Rule</b> is set, the IVR
	application modifies the collected PIN according to the
	PIN translation rule that allows the use of an ANI-based
	account (for example, ani442031234567) for PIN
	authentication. This provides your end-users, normally
	identified by caller IDs (ANI/CLI), with the option of
	making calls from other phone numbers without having
	to input hard-to-remember PIN numbers.
Auto Registration	If the user's ANI is not found and PIN authentication is
	successful, the user will be prompted to register his ANI
	for future PINless dialing. If the user confirms, the ANI
	number he is calling from is added as an alias to his
	account. The next time a call is made from that phone
	number, it will be authenticated by the ANI and he will
	not be asked to enter a PIN number.
Auto Registration	When this option is enabled, the IVR will not ask for
Without	confirmation before registering a user's ANI for future
Confirmation	PINless dialing. This option is effective only when the
	Auto Registration option is selected.
Minimum Card	Minimum length of a card number. By default: 11.
Length	
Maximum Card	Maximum length of a card number. By default: 11.
Length	
Maximum Login	Specify maximum number of attempts for user to enter a
Attempts	card number. By default: 3.



Check Service	Use this option to increase the security of a PIN-less
Password	dialing service or to allow end users to input their "ANI
	numbers" confirmed by service passwords for PIN
	authentication:
	None
	• For ANI authentication – The IVR
	application will never prompt the user for
	their service password after successful
	authentication by ANI.
	• For PIN authentication – It will be
	successful <i>only</i> if the user's account
	doesn't have a service password specified.
	This is a common use case for prepaid
	card services.
	• Always
	• For ANI authentication – The IVR
	application will always prompt the user
	for their service password.
	• For PIN authentication – The IVR
	application will prompt the user for their
	service password as long as the password
	is defined.
	Only PIN
	• For ANI authentication – The IVR
	application will never prompt the user for
	their service password. This is a common
	use case for ANI services.
	• For PIN authentication – The IVR
	application will prompt the user for their
	service password as long as the password
	is defined.
	• Only ANI
	$\circ$ For ANI authentication – The IVR
	application will always prompt the user
	for their service password.
	• For P1IN authentication – It will be
	doorn't have any sorrige recount
	doesn't have any service password
	DIN services
	T IIN SCIVICES.
	For example, in case of the <b>Always</b> or <b>Only ANI</b>
	options, the IVR will do the following: upon collecting
	an ANI number, the IVR prompts the user for their
	password and uses it for account validation (the
	password provided must match the account's service
	password).
	Note: If the account has an empty service password field,
© 2000-2015 PortaOne, Inc. All rights Reserved. ww	vanytesser mput will match it. 44
	Note: If the account has an empty service password field,
	any user input matches it.



Minimum	Minimum number of characters the valid service
Password Length	password consists of. By default: 4.
Maximum	Maximum number of characters the valid service
Password Length	password consists of. By default: 4.
Languages	This allows the user to select the language(s) to be used
	for voice prompts. Click the wizard icon <b>2</b> to open the
	language selection window and define languages in a
	specific order, and then upon reaching an access number,
	the end user can choose one of these languages.
Conf Language	If this box is checked, the language list defined on this
List is Preferred	page has a higher preference than the account's preferred
	language.
Prompts Brand	IVR prompts can be customized per Access Number.
	Specify the directory where the custom prompt files are
	located. The Media Server will look for the prompts in
	that folder first and if found – use them. Otherwise, it
	will use the default files. (For example, put customized
	English prompts under the directory
	/var/lib/porta-um/prompts/brands/my_company/en/
	and specify "my_company" in this field).
Play Welcome	If enabled, the IVR will play the welcome message to the
Message	user once he reaches an access number.
<b>Restriction for</b>	When account balance is less than product breakage and
Calling with Low	<b>disconnect</b> is defined, IVR plays the "you have
Balance	insufficient funds" voice prompt and disconnects the
	call. If no outgoing calls is defined, IVR prompts for
	the destination number but gives a busy tone and drops
	the call immediately after dialing it. Option <b>none</b> disables
	this feature.
Minimum	Minimum length of a voucher number.
Voucher Length	By default: 11 characters.
Maximum	Maximum length of a voucher number.
Voucher Length	By default: 11 characters.
Announce	If enabled, the IVR will announce the current balance for
Balance	the user before prompting for the phone number he
	wishes to reach.



Credit Accounts Balance Announcement	<ul> <li>You can configure your IVR applications to announce the current balance <i>for credit accounts</i> in one of two modes:</li> <li>Funds / balance – For prepaid customers (those who have a credit limit of 0 or less), announce "available funds" (calculated as credit limit minus balance) and announce the current balance for others (postpaid customers);</li> <li>Balance – Always announce balance (this is the classic mode, ideal for typical postpaid customers).</li> </ul>
	Note that a third "Backward compatibility" mode is enabled by default. It preserves the announcements exactly the way they worked in releases prior to MR35. In <i>APPENDIX B. Balance Announcements</i> , there are balance announcement examples for different IVR configurations.
Announce Credit Limit	If enabled, the balance announced to the end user will be followed by an announcement of the credit limit. This allows you to separate cases where credit limits are assigned only as a precaution (and so the end user should not really know about them) from cases where they are an integral part of the service (e.g. loyal customers are rewarded with an increased credit limit the longer they stay with you).
Enable Self-care menu	Enables the menu with additional options such as making a call using another prepaid card or the balance top-up. User can enter this menu by pressing the # key.
Play an	If enabled, the IVR will allow the user to enter the Self-
announcement about Self-care	care menu by pressing the # key.
Check Associated	When enabled, the prepaid card application checks if the
Number	account has specified an associated number. If it has, the call is redirected to this number.
	This field can also be used in different scenarios, e.g. together with the <b>Use ANI and Auth Code feature</b> .
Announce Time	When a user inputs the destination, IVR announces the maximum call duration allowed for this destination and then connects the call.
Use special access code for first calls	If enabled, a special tariff will be used for the first outgoing call made by users with prepaid cards. This tariff should be associated with the appropriate access code in the product's <b>Services and Rating</b> list. This access code depends on the <b>Use fixed access code for</b> <b>first calls</b> option described below.



Use fixed access code for first calls	This option specifies the special access code format that must be applied for the <i>first</i> outgoing call with prepaid cards. If this option is enabled, then the "FIRSTCALL" access code will be used. If this option is disabled, then the "FIRST#12345" access code will be used, where 12345 is the access number dialed.
Use	It is possible to use different tariffs for the
Announcement Tariff	announcement of the maximum call duration allowed and the rate for this call.
	The first (transparent) tariff should be associated with the "ANNOUNCE+DNIS" access code in the product's
	Services and Rating list.
	The second tariff should be associated with an actual
	access code.
	Thus, the user hears the time announced according to the first tariff, while the call is actually authorized and rated according to the second tariff.
Select Outgoing	If enabled, the calling card IVR can look up the "class"
Tariff Based on	(defined as a destination group) for the caller's number
ANI	and then use the class name as the "access code" when
	selecting a specific tariff in a product.
Seconds	This option defines the way the seconds portion of
Rounding Mode	"available time" is appounded to a customer.
B	• none there is no rounding so the time is
	announced including seconds, e.g. "Five minutes and 49 seconds."
	• $up$ – the time is rounded up to the nearest
	minute so 5:49 will be appounded as "Six
	minutes."
Play Pre-ring	By default, the calling party hears a ringtone while
MOH	waiting until the remote party answers. You may want to
	replace the ringtone with music on hold (MOH).
	Check this option to allow IVR to play a special MOH
	ring when the call has already been placed but the ring
	signal has not vet been received
Dynamic	Enable this feature to perform dynamic reauthorization
Reauthorization	for calls made though this access number. Dynamic
Reautionzation	result orization is required in cases where an account is
	concurrently using multiple services and making a
	navment while the session is still in progress
	payment while the session is suit in progress.
	Please consult the Overdraft Protection section in the
	PortaBilling® Administrator Guide for more information.



Music on Hold	Specify a Pre-ring MOH class here.
Class	Note: Ringtone files for custom MOH should be placed
	under
	/porta_var/porta-
	um/prompts/moh/OPTION_VALUE/
	(e.g. for the MOH class "my-ringtone" the path will be
	/porta_var/porta-um/prompts/moh/my-ringtone/).
Disconnection	This feature allows you to provide a warning when a call
Warning Interval.	is about to be disconnected because of insufficient funds.
sec	This ensures that the customer has a sufficient amount of
	time to react and either finish the call or top up their
	balance.
Repeat Every, sec	This feature allows you to provide multiple warnings
······································	before a call is disconnected because of insufficient
	funds. In this case, IVR repeats the warning every
	specified number of seconds until the end of the call
	specified number of seconds until the end of the call.
	These warnings help your customers to estimate whether
	there is enough time to finish their conversation or not
	or if necessary to top up their balance
Type of	Choose one of the following warning types:
Disconnection	here along "here "here "
Warning	• beep – plays beeping sound;
warning	• voice – announces the remaining time in
	seconds.
Disconnect Call	The call can be disconnected before an account's balance
Before, sec	is actually depleted. Specify in seconds (till the calculated
	end of the call) when to disconnect the call.
Maximum Dial	Maximum number of dial attempts within one session.
Attempts	By default: 3.
Premium Number	Specify the subscribe command, which must be sent in
Subscribe	an SMS to the premium number in order to register the
Command	customer's ANI.
Premium Number	Specify the SMS number where the customer can send an
SMS Number	SMS for registering his ANI.
Premium Number	Specify the amount which will be transferred from the
Deposited	customer's telecom balance to his account in your
Amount	PortaBilling <sup>®</sup> .
Premium Number	Specify the ISO 4217 currency code (e.g. USD) for
Currency	recharging purposes.

## **Callback Calling**

Field	Description
Authenticate by	This option defines a user-name for an authentication
	request. Choose one of the following:
	• ani – Calling-Station-ID (caller's number) is
	used for an authentication request.
	• <b>dnis</b> – Called-Station-ID (access number which
	was dialed) is used for an authentication
	request. This application establishes a callback
	to the associated number parameter of the
	account equal to the access number
	• none – Do not immediately authenticate. This
	application prompts the user to enter a card
	number for authentication after calling the user
	back
ANI	If ANI authentication is used, the voice application will
Translation	attempt to authenticate the customer's phone number
	(so he does not have to enter a PIN). Unfortunately
Kult	caller identification (the ANI or CLI number) is usually
	delivered in a specific format (e.g. "local" - without the
	country code and area code: 021234567) In this case
	you need to translate the number into a unified format
	so it matches the ID of the billing account. The
	recommended format is a non-numeric prefix followed
	by an E164 number - in our earlier example (assuming
	that the country code is <b>44</b> ) we applied ANI
	Translation Rule s/^0/cb44/ to obtain
	"cb4421234567" as the authorization ID. This allows
	you to manage numbers from different countries (so
	they do not overlap) and the "cb" prefix ensures that
	these accounts are not confused with actual phone
	numbers provisioned for on IP phones.
Send	When enabled, an authorization request will be sent
Authorization	along with authentication. It allows you to:
	• check if the caller has sufficient balance to
	initiate a call leg (i.e., user will not be called
	back if the balance is insufficient).
	• block some destinations for callback calls in the
	account's tariff (mark destinations as forbidden
	in the appropriate tariff rates).
	• use a <b>Minimum Sufficient Time</b> option.
Minimum	Specify the minimum amount of seconds a user needs
Sufficient Time	for leg A in order to use the callback service (applicable
	when <b>Send Authorization</b> is set to <b>Yes</b> and
	Minimum Sufficient Time $> 0$ ).



Dial	When the caller identification (ANI or CLI number) is
Translation	delivered in a specific format (e.g. "local") and should
Rule	be modified for a callback, this translation rule is used.
	For example, when caller identification is delivered in a
	domestic European dialing format (0 + area code +
	phone number, e.g. 0 5 888 7766) and we need to call
	the user back using an E164 format. In this case
	(assuming that the country code is 44) we would apply
	Dial Translation Rule <b>s/^0/44/</b> to obtain
	44 5 888 7766 as the number to call back.
Wait Time	Delay (in seconds) before the callback application calls
	the user back.
Auto	When enabled, it allows a caller to use callback with the
Registration	auto registration feature. When the customer dials an
	access number, the system drops the call to initiate the
	callback. Customer is prompted to enter a voucher
	number and after validation, the system creates a new
	account with the exact same options/product as the
	template account (a template account is defined as a
	parameter for each separate access number).
Template	Specify the account ID here to use its configuration
Account	properties as a template for all auto registered accounts.
Minimum Card	Minimum length of a card number. By default: 11.
Length	
Maximum Card	Maximum length of a card number. By default: 11.
Length	
Maximum	Maximum number of attempts for a user to enter a
Login Attempts	card number. By default: 3.
Use Internal	During callback, the user is asked to enter his card
Account	number. In case of unsuccessful authorization (e.g. the
	user has not entered a valid number) an internal
	account will be used for charging leg A.
	Enable the Use Internal Account option to use an
	internal account for a PIN-based callback scenario. By
	default: no.
Internal	Specifies an internal account.
Account	Also, you can allow/deny certain destinations in this
	account's tariff as the initial callback will be authorized
	with the 'fake account'.
	Note: If it is not defined, the Media Server uses the
	application access number by default.



Languages	This allows the user to select the language(s) to be used
	for voice prompts. Click the wizard icon 🖄 to open
	the language selection window and define languages in
	a specific order, and then upon reaching an access
	number, the end user can choose one of these
	languages.
Conf Language	If this box is checked, the language list defined on this
List is Preferred	page has a higher preference than the account's
	preferred language.
Prompts Brand	IVR prompts can be customized per Access Number.
_	Specify the directory where custom prompt files are
	located. The Media Server will look for the prompts in
	that folder first and if found – use them. Otherwise, it
	will use default files. (For example, put customized
	English prompts under the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).
Play Welcome	If enabled, the IVR will play the welcome message to
Message	the user once an access number is reached.
<b>Restriction for</b>	When account balance is less than product breakage
Calling with	and <b>disconnect</b> is defined, IVR plays the "you have
Low Balance	insufficient funds" voice prompt and disconnects the
	call. If no outgoing calls is defined, IVR prompts for
	the destination number but gives a busy tone and drops
	the call immediately after dialing it. Option none
	disables this feature.
Announce	If enabled, the IVR will announce the current balance
Balance	for the user before prompting for the phone number
	he wishes to reach.



Credit Accounts	You can configure your IVR applications to announce
Balance	the current balance for credit accounts in one of two
Announcement	modes:
	• Funds / balance - For prepaid customers
	(these who have a gredit limit of 0 or less)
	(those who have a credit limit of 0 of less),
	announce available runds (calculated as credit
	limit minus balance) and announce the current
	balance for others (postpaid customers);
	• Balance – Always announce balance (this is the
	classic mode, ideal for typical postpaid
	customers).
	Note that a third "Backward compatibility" mode is
	enabled by default. It preserves the announcements
	exactly the way they worked in releases prior to MR35.
	In APPENDIX B. Balance Announcements, there are
	balance announcement examples for different IVR
	configurations.
Announce	If enabled, the IVR will announce the credit limit as
Credit Limit	well as the account balance (applicable when <b>Credit</b>
	Accounts Balance Announcement is set to
	"balance" or "funds / balance").
LegA CLD	Leg A (callback to a user's number) access code prefix.
Prefix	Allows billing leg A with different tariff. A separate
	rating entry with the appropriate access code and tariff
	should exist in the product's list of rating entries
	Note: Access code must contain DNIS after the Prefix
	For example if the LegA CLD Prefix is LEG. A and
	the Access Number is 12125551234, then the Access
	Code should be LEC $A12125551234$
	Log R (more call to destination) access and are for
Droffy	Allows billing log R with different tariff. A apparent
Prelix	Allows blinning leg B with different tariff. A separate
	rating entry with the appropriate access code and tariff
	should exist in the product's list of rating entries.
	Note: Access code must contain DNIS after the Prefix.
	For example, if the <b>LegB CLD Prefix</b> is LEG_B and
	the Access Number is 12125551234, then the Access
	Code should be LEG_A12125551234.
Expected	This option venties that the account's balance is
Connect Time	sufficient for the leg B setup time.
	If the <b>Expected Connect Time</b> value is more than the
	maximum leg A duration, leg B will not be allowed. By
	default: 20 seconds.



Special Charge	By enabling this, you can charge users differently for calls with failed log B (a g incomplete call is not
II Lego Falls	calls with failed leg b (e.g. incomplete call is not
	charged). Just add a new rating entry to the product's
	rating list, set its access code to "CALLBACK_FAIL"
	and associate it with a special tariff.
Strict	When enabled, call leg A will be disconnected if caller
Authorization	doesn't have sufficient funds to place call leg B.
Announce	When user inputs the destination, IVR announces the
Time	maximum call duration allowed to this destination and
	then connects the call.
Use	It is possible to use different tariffs for the
Announcement	announcement of the maximum call duration allowed
Tariff	and for rating this call.
	The first (transparent) tariff should be associated with
	the "ANNOUNCE+DNIS" access code in the
	product's rating list.
	The second tariff should be associated with an actual
	access code.
	Thus, the user hears the time announced according to
	the first tariff, while the call is actually authorized and
	rated according to the second tariff.
Seconds	This option defines the way the seconds portion of
Rounding	"available time" is announced to a customer:
Mode	• <b>none</b> – there is no rounding, so the time is
	announced including seconds, e.g. "Five
	minutes and 49 seconds."
	• <b>up</b> – the time is rounded up to the nearest
	minute, so 5:49 will be announced as "Six
	minutes."
Play Pre-ring	By default, the calling party hears a ringtone while
MOH	waiting until the remote party answers. You may want
	to replace this ringtone with music on hold (MOH).
	Check this option to allow IVR to play a special ringing
	MOH when the call has been placed but the ring signal
	has not yet been received.
Music on Hold	Specify a Pre-ring MOH class here.
Class	Note: Ringtone files for custom MOH should be
	placed under
	/porta_var/porta-
	um/prompts/moh/OPTION_VALUE/
	(e.g. for the MOH class "my-ringtone" the path will be
	/porta_var/porta-um/prompts/moh/my-ringtone/).
Disconnection	This feature announces the remaining time in
Warning	seconds or simply plays a "beeping" sound. This "time
Interval	left" warning is played when a specified number of
	seconds is left before the call is disconnected.



Type of	Choose one of the following types of "time left"
Disconnection	warnings:
Warning	• <b>beep</b> – play "beeping" sound;
	• <b>voice</b> – announce the remaining time in
	seconds.
Disconnect Call	You can configure the system to disconnect a call
Before	before an account's balance is actually depleted. Specify
	in seconds (till the calculated end of the call) when to
	disconnect the call.
Maximum Dial	Maximum number of dial attempts within one session.
Attempts	By default: 3.

# Account Top-up via Credit Card

Field	Description
ANI Translation	Caller identification (ANI or CLI number) is
Rule	usually delivered in the "local" format, without the
	country code, etc., e.g. 021234567. In this case,
	you need to translate the number into a unified
	format so it will match the ID of the billing
	account. The recommended format is a non-
	numeric prefix followed by an E164 number. In
	our earlier example, assuming that the country
	code is 44, we applied ANI Translation Rule
	s/^0/ani44/ to obtain "ani4421234567" as the
	authorization ID. This allows you to manage
	numbers from different countries (so they will not
	overlap) and the "ANI" prefix will ensure that
	these accounts are not confused with the actual
	phone numbers provisioned for on IP phones.

Use Account	If enabled, an IVR application securely identifies a
Information	user if his account was originally authenticated by
Provided by	the PortaSIP® Switching Server instead of
PortaSIP	attempting to authenticate the customer's phone
	number (ANI) Only enable this for access
	numbers dialed from SIP phones connected to
	PortaSwitch® (calls within your VoIP network)
	Torraswitches (cans within your von network).
	This feature is useful in cases when normal ANI
	authentication by the IVP application can either
	he may different any second for the colling account
	be very difficult of unsafe (as the calling account
	may be mismatched):
	• The end user makes a call from his
	/ her IP phone with a CLI that is
	either hidden or different from the
	authenticated account ID;
	The account ID is an internal ANI number (e.g.
	000999123) or even a non-E164 identifier like an
	email address that can't be used as a normal CLI
	for outgoing calls.
Languages	This allows the user to select the language(s) to be
	used for voice prompts. Click the wizard icon 📝
	to open the language selection window and define
	languages in a specific order and then upon
	reaching an access number, the end user can
	choose one of these languages
Conf Language	If the box is checked, the language list defined on
List is Preferred	this page has a higher preference than the
List is i feferied	account's preferred language
Dromate Brand	IVP promote can be gustomized por Access
Frompts Brand	Number Specify the directory where queter
	Number. Specify the directory where custom
	prompt files are located. The Media Server will
	look for the prompts in that folder first and if
	found – use them. Otherwise, it will use default
	files. (For example, put customized English
	prompts under the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).
Minimum Card	Minimum length of a card number.
Length	By default: 11.
Maximum Card	Maximum length of a card number.
Length	By default: 11.
Maximum Login	Specify maximum number of attempts for a user
Attempts	to enter a card number. By default: 3.
Minimum	Minimum length of a voucher number.
Voucher Length	By default: 11.



Maximum	Maximum length of a voucher number.
Voucher Length	By default: 11.
Minimum Sum	Specify minimum amount of funds to be
	transferred from a customer's credit card.
Credit Accounts	You can configure your IVR applications to
Balance	announce the current balance for credit accounts in
Announcement	one of two modes:
	<ul> <li>Funds / balance – For prepaid customers (those who have a credit limit of 0 or less), announce "available funds" (calculated as credit limit minus balance) and announce the current balance for others (postpaid customers);</li> <li>Balance – Always announce balance (this is the classic mode, ideal for typical postpaid customers).</li> </ul>
	Note that a third "Backward compatibility" mode is enabled by default. It preserves the
	announcements exactly the way they worked in
	Announcements there are balance appouncement
	examples for different IVR configurations
Announce Credit	If enabled the IVR will appounce the credit limit
Limit	as well as the account balance (applicable when
	Credit Accounts Balance Announcement is set
	to "balance" or "funds / balance")
Customer Conter	Specify the number where a user may reach an
Number	specify the number where a user may reach an
number	operator.

Field	Description
ANI Translation	Caller identification (ANI or CLI number) is
Rule	usually delivered in the "local" format, without the
	country code, etc., e.g. 021234567. In this case,
	you need to translate the number into a unified
	format so it will match the ID of the billing
	account. The recommended format is a non-
	numeric prefix followed by an E164 number. In
	our earlier example, assuming that the country
	code is 44, we applied ANI Translation Rule
	s/^0/ani44/ to obtain "ani4421234567" as the
	authorization ID. This allows you to manage
	numbers from different countries (so they will not
	overlap) and the "ANI" prefix will ensure that
	these accounts are not confused with the actual
	phone numbers provisioned for on IP phones.
Use Account	If enabled, an IVR application securely identifies a
Information	user if his account was originally authenticated by
Provided by	the PortaSIP® Switching Server instead of
PortaSIP	attempting to authenticate the customer's phone
	number (ANI). Only enable this for access
	numbers dialed from SIP phones connected to
	PortaSwitch <sup>®</sup> (calls within your VoIP network).
	This feature is useful in cases when normal ANI
	authentication by the IVR application can either
	be very difficult or unsafe (as the calling account
	may be mismatched):
	• The end user makes a call from his
	/ her IP phone with a CLI that is
	either hidden or different from the
	authenticated account ID;
	The account ID is an internal ANI number (e.g.
	000999123) or even a non-E164 identifier like an
	email address that can't be used as a normal CLI
	for outgoing calls.

## Account Top-up via Voucher



Prompts Brand	IVR prompts can be customized per Access Number. Specify the directory where custom prompt files are located. The Media Server will look for the prompts in that folder first and if found – use them. Otherwise, it will use default files. (For example, put customized English prompts under the directory /var/lib/porta-um/prompts/brands/ my_company/en/ and specify "my_company" in this field).
Maximum Login	Specify maximum number of attempts for a user
Attempts	to enter a card number. By default: 3.
Minimum	Minimum length of a voucher number.
Voucher Length	By default: 11.
Maximum	Maximum length of a voucher number.
Voucher Length	By default: 11.
Allow to transfer	Select this checkbox to allow a customer to top-
the balance from	up his main account using another pre-paid card
debit accounts	(i.e., from a debit account) in PortaBilling®
	instead of a top-up voucher.
	accounts to function properly, the "donor" account must have the same currency and product as the "recipient" account and must never be used for making calls prior to the recharge (this is to prevent potential fraudulent attempts at "stealing" someone else's balance).
Credit Accounts	You can configure your IVR applications to
Balance	announce the current balance <i>for credit accounts</i> in
Announcement	one of two modes:
	<ul> <li>Funds / balance – For prepaid customers (those who have a credit limit of 0 or less), announce "available funds" (calculated as credit limit minus balance) and announce the current balance for others (postpaid customers);</li> <li>Balance – Always announce balance (this is the classic mode, ideal for typical postpaid customers).</li> </ul>
	Note that a third "Backward compatibility" mode is enabled by default. It preserves the announcements exactly the way they worked in releases prior to MR35. In <i>APPENDIX B. Balance</i> <i>Announcements</i> , there are balance announcement examples for different IVR configurations.



Announce Credit	If enabled, the IVR will announce the credit limit
Limit	as well as the account balance (applicable when
	Credit Accounts Balance Announcement is set
	to "balance" or "funds / balance").

## **One-stage Calling**

Note that the number for this application must be in the format <special-prefix>%, e.g. 5061999%.

The process of One-stage calling to an Access Number is the following:

- The customer dials any number (e.g. 12065551234) from his home phone;
- The local telco sends this call to your system with a special 5061999 prefix (so, for example, the CLD is 506199912065551234); alternatively this special prefix can be added in the **Translation Rule** field of the particular connection or even dialed by the customer (this depends upon the agreement between the local telco and your company);
- The call is routed to the Media Server;
- The Media Server starts the One-stage calling application;
- The application strips the 5061999 prefix from the CLD and sends an authorization request to PortaBilling;
- PortaBilling® performs the authentication by ANI, checks whether the customer is allowed to call this particular destination and the length of the maximum allowed call duration, and sends back a reply;
- IVR announces the maximum allowed call duration (if enabled);
- The application sends the call to the Switching Server (the CLD is 12065551234); and
- The Switching Server routes the call according to the system routing plan.

Field	Description
ANI	If ANI authentication is turned on, the voice application
Translation	will attempt to authenticate the customer's phone
Rule	number (so he does not have to enter a PIN).
	Unfortunately, caller identification (ANI or CLI
	number) is usually given in the "local" format, without a
	country code, etc.: 021234567. In this case, you need to
	translate the number into a unified format so it matches
	the ID of an account for billing. The recommended
	format is a non-numeric prefix followed by an E164
	number in our earlier example (assuming that the
	country code is 44) we applied ANI Translation Rule
	$s/^0/ani44/$ to obtain "ani4421234567" as the
	authorization ID. This allows you to manage numbers
	from different countries (so they do not overlap) and the
	"ANI" prefix ensures that these accounts are not
	confused with actual phone numbers provisioned for on
	IP phones
Languages	This allows the user to select the language(s) to be used
Languages	This allows the user to select the language(s) to be used
	for voice prompts. Click the wizard icon Z to open the
	language selection window and define languages in a
	specific order, and then upon reaching an access
	number, the end user can choose one of these languages.
Conf	If the box is checked, the language list defined on this
Language	page has a higher preference than the account's
List is	preferred language.
Preferred	
Prompts	IVR prompts can be customized per Access Number.
Brand	Specify the directory where the custom prompt files are
	located. The Media Server will look for the prompts in
	that folder first and if found – use them. Otherwise, it
	will use default files. (For example, put customized
	English prompts under the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).
Play	If enabled, the IVR will play the welcome message to a
Welcome	user once he reaches an access number.
Message	
Announce	When user inputs the destination, IVR announces the
Time	maximum call duration allowed to this destination and
	then connects the call.



Use	It is possible to use different tariffs for the
Announcem	announcements of maximum call duration allowed and
ent Tariff	the call's rating.
	The first (transparent) tariff should be associated with
	the "ANNOUNCE+DNIS" access code in the
	product's Services and Rating list.
	The second tariff should be associated with an actual
	access code.
	Thus, the user hears the time announced according to
	the first tariff while the call is actually authorized and
	rated according to the second tariff.
Seconds	This option defines the way the seconds portion of
Rounding	"available time" is announced to a customer:
Mode	• <b>none</b> – there is no rounding, so the time is
	announced including seconds, e.g. "Five minutes
	and 49 seconds."
	• up – the time is rounded up to the nearest
	minute, so 5:49 will be announced as "Six
	minutes."

## **One's Own Voice Mailbox Access**

Field	Description
Languages	This allows the user to select the language(s) to be used
	for voice prompts. Click the wizard icon 🖄 to open the
	language selection window and define languages in a
	specific order, and then upon reaching an access
	number, the end user can choose one of these languages.



Use	If enabled, an IVR application securely identifies a user
Account	if his account was originally authenticated by the
Information	PortaSIP® Switching Server instead of attempting to
Provided by	authenticate the customer's phone number (ANI). Only
PortaSIP	enable this for access numbers dialed from SIP phones
	connected to PortaSwitch® (calls within your VoIP
	network).
	,
	This feature is useful in cases when normal ANI
	authentication by the IVR application can either be very
	difficult or unsafe (as the calling account may be
	mismatched):
	• The end user makes a call from his / her
	IP phone with a CLI that is either hidden
	or different from the authenticated
	account ID:
	$\circ$ The account ID is an internal ANI
	number (e.g. 000999123) or even a non-
	F164 identifier like an email address that
	cap't be used as a pormal CLI for
	outgoing calls.

You can allow customers to make outgoing calls from their mailboxes. This can be enabled on the **Voice Applications Settings** tab.

## **Premium Numbers**

Field	Description
Prompts Brand	IVR prompts can be customized per Access
	Number. Specify the directory where the custom
	prompt files are located. The Media Server will look
	for the prompts in that folder first and if found –
	use them. Otherwise, it will use default files. (For
	example, put customized English prompts under
	the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).
Special	Specifies the ID of a specially configured premium
Username	number account. The account must have no credit
	limit (to allow unlimited chargeable calls); account's
	product must list all access numbers in its services
	and rating list and each one must be associated with
	a corresponding tariff.
Customer Care	Specifies the number a user can call if he
Number	experiences any difficulties using the service. This
	number will be announced to the user by the IVR.



Specifies the price for this particular access
number. If the user tries to dial a destination that is
not covered by the access number he has called,
PortaBilling® will try to find the proper access
number by matching the price for the desired
destination (in the tariff assigned to the current
access number) with the value specified here. The
user is then informed of it.

## **Account Self-Care**

Field	Description
Languagea	This allows the user to select the language(s) to be
Languages	This allows the user to select the language(s) to be
	used for voice prompts. Click the wizard icon <b>2</b> to
	open the language selection window and define
	languages in a specific order, and then upon
	reaching an access number, the end user can
	choose one of these languages.
Prompts Brand	IVR prompts can be customized per Access
	Number. Specify the directory where the custom
	prompt files are located. The Media Server will look
	for the prompts in that folder first and if found –
	use them. Otherwise, it will use default files. (For
	example, put customized English prompts under
	the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).
Follow Me	This specifies how long the IP phone will ring
Timeout	before the call goes to follow-me numbers.
Play Welcome	If enabled, the IVR will play the welcome message
Message	to the user once he reaches an access number.

## **Balance information**

Field	Description
Use Early Media	If enabled, the IVR will announce the account's
	balance without establishing a call so the end user is
	not charged by their telco.



ANI Translation	If ANI authentication is turned on, the voice
Rule	application will attempt to authenticate the
	customer's phone number (so he does not have to
	enter a PIN). Unfortunately, caller identification
	(ANI or CLI number) is usually given in the "local"
	format, without a country code, etc.: 021234567. In
	this case, you need to translate the number into a
	unified format so it matches the ID of an account
	for billing. The recommended format is a non-
	numeric prefix followed by an E164 number in our
	earlier example (assuming that the country code is
	44) we applied ANI Translation Rule s/^0/ani44/
	to obtain "ani4421234567" as the authorization ID.
	This allows you to manage numbers from different
	countries (so they do not overlap) and the "ANI"
	prefix ensures that these accounts are not confused
	with actual phone numbers provisioned for on IP
	phones.
Use Account	If enabled, an IVR application securely identifies a
Information	user if his account was originally authenticated by
Provided by	the PortaSIP® Switching Server instead of
PortaSIP	attempting to authenticate the customer's phone
	number (ANI). Only enable this for access
	numbers dialed from SIP phones connected to
	PortaSwitch <sup>®</sup> (calls within your VoIP network).
	This feature is useful in cases when normal ANI
	authentication by the IVR application can either be
	very difficult or unsafe (as the calling account may
	be mismatched):
	• The end user makes a call from his
	/ her IP phone with a CLI that is
	either hidden or different from the
	authenticated account ID:
	• The account ID is an internal ANI
	number (e.g. 000999123) or even a
	non-E164 identifier like an email
	address that can't be used as a
	normal CLI for outgoing calls.



Prompts Brand	IVR prompts can be customized per Access
	Number. Specify the directory where the custom
	prompt files are located. The Media Server will look
	for the prompts in that folder first and if found –
	use them. Otherwise, it will use default files. (For
	example, put customized English prompts under
	the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).

## **Call forwarding management**

Field	Description
<b>Prompts Brand</b>	IVR prompts can be customized per Access
	Number. Specify the directory where the custom
	prompt files are located. The Media Server will look
	for the prompts in that folder first and if found –
	use them. Otherwise, it will use default files. (For
	example, put customized English prompts under
	the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).

## Conferencing

Field	Description
Languages	This allows the user to select the language(s) to be
	used for voice prompts. Click the wizard icon $\stackrel{\bullet}{>}$ to
	open the language selection window and define
	languages in a specific order, and then upon
	reaching an access number, the end user can
	choose one of these languages.
Maximum Login	Specify maximum number of attempts for a user to
Attempts	enter a card number. By default: 3.
Prompts Brand	IVR prompts can be customized per Access
	Number. Specify the directory where the custom
	prompt files are located. The Media Server will look
	for the prompts in that folder first and if found –
	use them. Otherwise, it will use default files. (For
	example, put customized English prompts under
	the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).



Record with Review	If enabled, the IVR will play back the name that the end user recorded; if preferred, it can be re- recorded.
Play Welcome	If enabled, the IVR will play the welcome message
Message	to the user once he reaches an access number.

## **Pass-through IVR**

This IVR application introduces prepaid card calling features to traditional residential VoIP service. For example, the application can play a "time left" warning when a specified number of seconds is left – before the call is disconnected. It can also announce the maximum call duration allowed to the dialed destination and then connect the call. In addition, the Pass-through IVR permits additional verification of the outgoing toll (e.g. on international) calls.

The administrator controls whether the outgoing calls are made in a normal fashion or if the calls are handled by the Pass-through IVR application. This is specified in the account's **Service Features** configuration section.

Field	Description
Maximum	Maximum allowable length for an authorization
Length of the	code.
Auth Code	By default: 4.
Maximum Login	Specify maximum number of attempts for a user to
Attempts	enter a card number. By default: 3.
Announce Time	When user inputs the destination, the IVR
	announces the maximum call duration allowed to
	this destination and then connects the call. By
	default this feature is disabled.
Type of	Choose one of the following types of "time left"
Disconnection	warnings:
Warning	• <b>beep</b> – play "beeping" sound;
	• <b>voice</b> – announce the remaining time in seconds.
Disconnection	This feature announces the remaining time in
Warning Interval	seconds or simply plays a "beeping" sound. This
	"time left" warning is played when a specified
	number of seconds is left before the call is
	disconnected.

Please consult the *Voiceover Announcements* section in the **PortaSIP**® **Switching Server Administrator Guide** for more information.



Authorize Non- Free CallsEnable this option to perform an additional verification for toll calls. This will prevent unauthorized usage of phones available in public areas. Furthermore, if a single phone is shared among multiple users, then the outgoing calls can be billed to separate accounts; this will allow for accountability for each user based on the input authorization code. By default: disabled.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account.If there is one, the authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g. 74051234567#1234) will be used to authorization
Free Callsverification for toll calls. This will prevent unauthorized usage of phones available in public areas. Furthermore, if a single phone is shared among multiple users, then the outgoing calls can be billed to separate accounts; this will allow for accountability for each user based on the input authorization code. By default: disabled.Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account.If there is one, the authorization is done using the associated number and authorization code, e.g. 74051234567#1234) will be used to authorization
prevent unauthorized usage of phones available in public areas. Furthermore, if a single phone is shared among multiple users, then the outgoing calls can be billed to separate accounts; this will allow for accountability for each user based on the input authorization code. By default: disabled.Note that if this option is disabled and the <b>Treat Auth</b> <b>Code as Part of Account ID</b> option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g. 74051234567#12340 will be used to authorization
Public areas. Furthermore, if a single phone is shared among multiple users, then the outgoing calls can be billed to separate accounts; this will allow for accountability for each user based on the input authorization code. By default: disabled.Note that if this option is disabled and the <b>Treat Auth</b> <b>Code as Part of Account ID</b> option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g. 74051234567#1234) will be used to authorization
Is shared among multiple users, then the outgoing calls can be billed to separate accounts; this will allow for accountability for each user based on the input authorization code. By default: disabled.Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.
calls can be billed to separate accounts; this will allow for accountability for each user based on the input authorization code. By default: disabled.Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.
allow for accountability for each user based on the input authorization code. By default: disabled.Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.
Index for accountability for each user black of theinput authorization code. By default: disabled.Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.
Impart authorization code: By default, disabled.Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.74051234567#1234) will be used to authorization
Note that if this option is disabled and the Treat Auth Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.
Code as Part of Account ID option is enabled at the same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account.If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.74051234567#1234) will be used to authorization
same time, the user will only be able to make toll-free calls.Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.74051234567#1234) will be used to authorize to authorize to produce to authorize to
Use Associated Number to Produce Auth IDWhen this option is enabled, the application checks for an associated number specified for the account. If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.74051234567#1234) will be used to authorization
Number to Produce Auth IDfor an associated number specified for the account.If there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.74051234567#1234) will be used to authorization
Produce Auth IDIf there is one, the authorization is done using the associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g.74051234567#1234) will be used to authorization
associated number and authorization code input by the user (i.e. account's associated number followed by # followed by authorization code, e.g. 74051234567#1234) will be used to authorizate
the user (i.e. account's associated number followed by # followed by authorization code, e.g. 74051234567#1234) will be used to authorizate
by # followed by authorization code, e.g.
74051234567#1234) will be used to authenticate
(473123430777234) will be used to auticitudate
the call). By default this is disabled.
<b>Treat Auth Code</b> Enable this feature if a single phone is shared
as Part of among multiple users and there is a need to bill
Account ID outgoing calls to separate accounts: the account
with ID AccountID# AuthCode (account ID followed
by # followed by authorization code, e.g.
12121234567#1234) will be used to authenticate
the call
If this feature is disabled, the input authorization
code will be compared with the account's Service
Linblock Code (defined in the Eraud Detection
tab) to confirm that a legitimate user is attempting
to make a call. By default this feature is enabled

# **Payment remittance – TransferTo**

Field	Description
Minimum Card	Minimum length of a card number.
Length	By default: 11.
Maximum Card	Maximum length of a card number.
Length	By default: 11.
Maximum Login	Specify maximum number of attempts for a
Attempts	user to enter a card number. By default: 3.
Play Welcome	If enabled, the IVR will play the welcome
Message	message to the user once he reaches an access
	number.



Prompts Brand	IVR prompts can be customized per Access
	Number. Specify the directory where the
	custom prompt files are located. The Media
	Server will look for the prompts in that folder
	first and if found – use them. Otherwise, it will
	use default files. (For example, put customized
	English prompts under the directory
	/var/lib/porta-um/prompts/brands/
	my_company/en/
	and specify "my_company" in this field).

## Simplified account self-care

Field	Description					
Play	If enabled, the IVR will play the					
Announcements	announcements without establishing a call so					
	the end user will not be charged by their telco.					
Use Account	If enabled, an IVR application securely					
Information	identifies a user if his account was originally					
Provided by	authenticated by the PortaSIP® Switching					
PortaSIP	Server instead of attempting to authenticate the customer's phone number (ANI). Only enable this for access numbers dialed from SIP phones connected to PortaSwitch® (calls within your VoIP network).					
	This feature is useful in cases when normal ANI authentication by the IVR application can either be very difficult or unsafe (as the calling account may be mismatched): • The end user makes a call from his / her IP phone with a CLI that is either hidden or different from the authenticated account ID:					
	The account ID is an internal ANI number (e.g. 000999123) or even a non-E164 identifier like					
	CLI for outgoing calls.					



ANI Translation Rule	If ANI authentication is turned on, the voice application will attempt to authenticate the customer's phone number (so he does not have to enter a PIN). Unfortunately, caller			
	given in the "local" format, without a country code, etc.: <b>021234567</b> . In this case, you need to translate the number into a unified format so it matches the ID of an account for billing. The			
	followed by an E164 number in our earlier example (assuming that the country code is 44) we applied ANI Translation Rule s/^0/ani44/ to obtain "ani4421234567" as the authorization			
	ID. This allows you to manage numbers from different countries (so they do not overlap) and the "ANI" prefix ensures that these accounts are not confused with actual phone numbers provisioned for on IP phones			
Etalon Account	Specify the account ID here to use its configuration properties as an etalon for all accounts.			
Prompts Brand	IVR prompts can be customized per AccessNumber. Specify the directory where the custom prompt files are located. The MediaServer will look for the prompts in that folder first and if found – use them. Otherwise, it will use default files. (For example, put customized English prompts under the directory /var/lib/porta-um/prompts/brands/ my_company/en/			
	and specify "my_company" in this field).			

# **APPENDIX B. Voice Applications Settings**

Field	Description				
Access Code	This allows you to apply a special rating to				
	outgoing calls made by customers from their				
	voice mailboxes. For example, if an				
	administrator specifies the VOICEMAIL				
	access code in the application settings, then				
	PortaBilling® will use a rating entry with this				
	very access code from the account's product to				
	authorize outgoing calls from users' voice				
	mailboxes.				

### **One's Own Voice Mailbox Access**

# **APPENDIX C. Balance Announcements**

In the table below you can see available variants for balance announcements with the **Credit Accounts Balance Announcement** option set to **backward compatibility** or **funds / balance** value:

	Backward Compatibility	Funds/Balance			
Balance $= 10;$	"You have 290 dollars."	"You have 290 dollars			
Credit Limit =		available."			
300					
Balance = 10;	"You have unlimited	"Your balance is 10			
Credit Limit =	available funds."	dollars."			
n/a					
Balance $= -10;$	"You have 310 dollars."	"Your balance is minus			
Credit Limit =		10 dollars."			
300					
Balance $= -10;$	"You have 10 dollars."	"You have 10 dollars			
Credit Limit = 0		available."			

In the following table you can see available variants for balance announcements with the **Credit Account Balance Announcement** option set to **balance** value (with the **Announce Credit Limit** option enabled / disabled):

	Balance				
	Without Credit Limit Announcement	With Credit Limit Announcement			
Balance = 10;	"Your balance is 10	"Your balance is 10			
Credit Limit =	dollars."	dollars, your credit limit			



300		is 300 dollars."		
Balance = 10;	"Your balance is 10	"Your balance is 10		
Credit Limit =	dollars."	dollars, there is no cred		
n/a		limit."		
Balance $=$ -10;	"Your balance is minus	"Your balance is minus		
Credit Limit =	10 dollars."	10 dollars, you credit		
300		limit is 300 dollars."		
Balance $=$ -10;	"Your balance is minus	"Your balance is minus		
Credit Limit = 0	10 dollars."	10 dollars, you credit		
		limit is 0 dollars."		

# **APPENDIX D. Supported DTMF Methods**

PortaSIP® supports the following DTMF methods:

- Inband (as normal audio tones in the RTP stream with no special coding or markers)
- RFC 2833 (as named telephone events in the RTP stream)
- SIP INFO method this is the preferred DTMF method

Please note that to use these DTMF methods they must be enabled on the Configuration Server Web Interface.

# **APPENDIX E. Fax Transmission-Supported** Codecs

PortaSIP® supports high-quality fax transmission in the following codecs:

- T.38
- G711 (G711a and G711u)

# **APPENDIX F. Supported Languages**

The following tables show which languages are supported by specific Media Server IVR applications.

	English (en)	Spanish (es)	French (fr)	Swiss French (fr-CH)	Hebrew (he)	Brazilian Portuguese (pt-BR)	Russian (ru)	Cantonese Chinese (yu)
APPLICATION								
Account top-up via credit card	Yes	Yes	No	No	No	No	No	No
Simplified account self-care	Yes	Yes	No	No	No	No	No	No
Call Forwarding management	Yes	Yes	Yes	No	Yes	No	Yes	No
Account Self-care	Yes	Yes	Yes	No	Yes	No	No	No
Account top-up via voucher	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Balance information	Yes	Yes	Yes	No	No	No	Yes	No
One's own voice mailbox access (with PIN protection)	Yes	Yes	Р	No	Р	No	Р	No
One's own voice mailbox access	Yes	Yes	Р	No	Р	No	Р	No
Payment Remittance	Yes	Yes	No	No	No	No	No	No

## **Self-care IVR Applications**


LANGUAGE	Mandarin Chinese (cm)	Greek (el)	Arabic (ar)	Swedish (sv)	German (de)	Italian (it)	Myanmar (my)	Turkish (tr)
Account top-up via credit card	Yes	No	Yes	Yes	Yes	Yes	No	Yes
Simplified account self-care	Yes	No	Yes	Yes	Yes	Yes	No	Yes
Call Forwarding management	Yes	No	Yes	Yes	Yes	Yes	No	Yes
Account Self-care	Yes	No	Yes	Yes	Yes	Yes	No	Yes
Account top-up via voucher	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Balance information	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
One's own voice mailbox access (with PIN protection)	Yes	No	Yes	Yes	Yes	Yes	No	Yes
One's own voice mailbox access	Yes	No	Yes	Yes	Yes	Yes	No	Yes
Payment Remittance	No	No	No	No	Yes	Yes	No	Yes



# **Outgoing Calling Applications**

LANGUAGE	English (en)	Spanish (es)	French (fr)	Swiss French (fr-CH)	Hebrew (he)	Brazilian Portuguese (pt-BR)	Russian (ru)	Cantonese Chinese (yu)
One-stage calling	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Р
Callback calling	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Р
Prepaid Card Calling	Yes	Yes	Yes	Р	Р	Yes	Yes	Р
Premium Numbers	Yes	Yes	No	No	No	No	No	No

LANGUAGE	Mandarin Chinese (cm)	Greek (el)	Arabic (ar)	Swedish (sv)	German (de)	Italian (it)	Myanmar (my)	Turkish (tr)
One-stage calling	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Callback calling	Yes	Р	Yes	Yes	Yes	Yes	Yes	Yes
Prepaid Card Calling	Yes	Р	Yes	Yes	Yes	Yes	Р	Yes
Premium Numbers	No	No	No	No	Yes	No	No	Yes



# **Other IVR Applications**

LANGUAGE	English (en)	Spanish (es)	French (fr)	Swiss French (fr-CH)	Hebrew (he)	Brazilian Portuguese (pt-BR)	Russian (ru)	Cantonese Chinese (yu)
Conferencing	Yes	No	Yes	No	No	No	No	No

LANGUAGE	Mandarin Chinese (cm)	Greek (el)	Arabic (ar)	Swedish (sv)	German (de)	ltalian (it)	Myanmar (my)	Turkish (tr)
Conferencing	No	No	No	No	No	No	No	Yes

- No not supported
- Yes fully supported
- P partially supported (incomplete prompts list or prompts are out of date)



LANGUAGE	Supported currency (ISO 4217 code)	Default currency (ISO 4217 code)
Arabic	BHD, USD, EUR	BHD
Cantonese Chinese	USD, CNY	USD
English	USD, RUB, EUR, GBP, THB, INR, MYR, BND, AED, IRR, ZAR, CHF, CNY, DKK, MXN, TRY, NGN, BHD, AUD, HKD, NZD, SGD, PKR, JOD, IQD, EGP, PHP, IDR, BDT, CRC	USD
French	USD, EUR, RUB, GBP, THB, INR, MYR, BND, AED	USD
German	USD, RUB, EUR, GBP, CHF	EUR
Greek	USD, EUR	EUR
Hebrew	ILS, USD, EUR	ILS
Italian	USD, RUB, EUR, GBP, CHF	EUR
Mandarin Chinese	USD, CNY	USD
Myanmar	USD, EUR, THB, MMK	MMK
Portuguese	USD, BRL, EUR	EUR
Russian	USD, RUB	RUB
Spanish	USD, EUR, CRC	EUR
Swedish	SEK, USD, RUB, EUR, GBP, THB, INR, MYR, BND, AED, IRR	USD
Swiss French	USD, EUR, FRF	USD

If account's currency is not supported by the IVR application, then IVR uses a default currency:



# ISO 4217 code AED – United Arab Emirates dirham AUD – Australian dollar BDT – Bangladeshi taka BHD – Bahraini dinar BND – Brunei dollar BRL – Brazilian real CHF – Swiss franc CNY – Renminbi CRC – Costa Rican colón

- **DKK** Danish krone
- **EGP** Egyptian pound
- EUR Euro
- **FRF** French franc
- **GBP** Pound sterling
- HKD Hong Kong dollar
- **IDR** Indonesian rupiah
- $\boldsymbol{ILS}-\mathrm{Israeli}\ \mathrm{new}\ \mathrm{shekel}$

**INR** – Indian rupee IQD – Iraqi dinar IRR – Iranian rial **JOD** – Jordanian dinar **MMK** – Burmese kyat **MXN** – Mexican peso **MYR** – Malaysian ringgit NGN – Nigerian naira NZD – New Zealand dollar **PHP** – Philippine peso **PKR** – Pakistani rupee **RUB** – Russian ruble **SEK** – Swedish krona **SGD** – Singapore dollar **THB** – Thai baht **TRY** – Turkish lira **USD** – United States dollar **ZAR** – South African rand

# **APPENDIX G. IVR Flow Diagrams**

#### One's Own Voice Mailbox Access IVR (Short Schema)

The Media Server mailbox can be accessed by phone by dialing \*98.

Below is an IVR path diagram to help users in navigating and configuring the system. A full IVR diagram can be found in the One's Own Voice Mailbox Access IVR (Full Schema) section.



#### Account Self-care IVR (Short Schema)

Below is a brief IVR path diagram to help users to navigate and configure the system. A full IVR diagram can be found in the Account Self-care IVR (Full Schema) section.



## Account Top-up via Voucher IVR



## Account Top-up via Credit Card IVR





#### Account Top-up via Credit Card IVR - Select IVR Language







## **Balance Information**







## Prepaid Card Calling IVR



#### Callback IVRs

ANI Callback IVR Part 1



ANI Callback IVR Part 2



## DNIS Callback IVR Part 1



DNIS Callback IVR Part 2



#### PIN Callback IVR Part 1



PIN Callback IVR Part 2



Callback with Registration IVR Part 1



Callback with Registration IVR Part 2





## One-stage Calling IVR



#### One-stage Calling IVR - Place Outgoing Call



## Payment Remittance - TransferTo IVR





# Conferencing IVR



#### One's Own Voice Mailbox Access IVR

One's Own Voice Mailbox Access IVR - Full Schema



#### One's Own Voice Mailbox Access IVR - Check Caller



#### One's Own Voice Mailbox Access IVR - Check Account ID and Service Password



#### One's Own Voice Mailbox Access IVR - Check Service Password





#### One's Own Voice Mailbox Access IVR - Play Voice Messages



#### One's Own Voice Mailbox Access IVR - Personal Options



#### One's Own Voice Mailbox Access IVR - Play Balance


## One's Own Voice Mailbox Access IVR - Make Outgoing Call



# One's Own Voice Mailbox Access IVR - Administrative Options



## One's Own Voice Mailbox Access IVR - Greetings Options



## One's Own Voice Mailbox Access IVR - Change Password Menu



## One's Own Voice Mailbox Access IVR - Prompt Level Menu







### Account Self-care IVR (Full Schema)



## Auto Attendant IVR



