Account Management User Guide

After reading this guide, you will be able to:

- Sign In to Account Management
- Modify your User Profile
- Add Users/Give Account Management Controls to Users (Administrators only)
- View and Modify PINs
- Run, View, Export and Print Real-Time Business Intelligence Reports
- View, Export, Print, and Pay Invoices
- Submit Inbound Access Requests
- Submit Interpretation Requests
- View Items In your Document Library

Sign In to Account Management

To access Account Management, click the “Account Management Login” link located in the top right corner of the Voiance homepage. Afterwards, you will be directed to the Account Management Login page where you will be prompted to enter your Username and Password.

To sign up for Voiance Account Management, contact your account manager or email support@voiance.com

Problems logging in? Contact Client Services at 1-800-481-3289
Modify Your User Profile

After you sign in, you’ll arrive on the Account Management home page. To begin modifying your profile information or change your password, click Profile.

Once on the Profile page, you can view and edit your personal information and settings to:

Modify your user information and contact information by clicking the “Edit” button next to the section, entering your information in the fields provided, and clicking “Save”.

Change your password by clicking the “Change Password” link, typing in your old and new passwords in the fields provided, and clicking “Submit.” Your password must be at least six characters long and contain at least one letter and one number. If you forgot your password, you will be prompted to enter an answer to your preset security question. Afterwards, an email providing a temporary password will be sent to your address. If you do not have a preset security question, you must contact Client Services or your account manager.

Create or change your security question and answer by clicking the “Change Security Question & Answer” link. Type in your current password, select a security question, and provide an answer in the field, and click “Save”. You will be required to answer this question if you ever forget your password.

Change your homepage by clicking the drop-down menu and either scrolling or typing to find your new homepage. Upon making a change, you will get a green pop-up notification in the bottom right-hand corner, confirming the user information has been updated.

Change your time zone preference by clicking the drop-down menu and selecting your desired time zone. Upon selection, you will get a green pop-up notification in the bottom right hand corner, confirming the user information has been updated.

Modify your email address by clicking the “Update Email” button, entering your email in the field provided, and clicking “Update”. A message with a verification link will be sent to the new address entered. Follow the link in the email to validate the new email address and access your account.
Add Users/ Give Account Management Controls to Users (Administrators Only)

With Account Management Administrator Permissions you can create new User Profiles with access customizations. Additionally, you can give users in your organization access to PIN Management, Invoicing, Reporting, Interpretation Requests, and Administrator Permissions.

1. To perform any of these functions, select User Administration on the Account Management main page.

If you are an administrator for multiple accounts, you will need to search for desired account by entering a customer number or customer name in the search field.

2. On the User Administration landing page, you can view and modify user information:
   - To view or edit a user’s profile or to reset their login password, select the user and click the “Manage” button at the top of the table.
   - To remove a user, select the user and click the “Remove” button at the top of the table.
   - To add a new user, click the “+Add New” button.
     a. You will be prompted to type in the email address for the new user and click the “Add User” button. You will be taken to a new page to enter in the user’s information. Click “Save”. Once the new user’s information is entered, an email will be sent to the user’s email address providing instructions on how they can access their account.

*Note: New user must follow email verification instructions within 48 hours, or the request will become inactive. To resend the request, click the “Resend Verification” button under Unverified User, which will re-send the verification email.

b. You must check what features the user should have access to - default access is for Inbound Access Setup Request and Profile only. Features available include Administrator, PIN Management, Video & Phone Interpretation Request, Reports & Call Analysis, Inbound Access Setup Request, and Profile.

*Note: Invoices and video Scheduling can be set up Voiance only. Please contact your account manager if you are interested in these features.
Add Users/ Give Account Management Controls to Users (Cont.)

3. To enable/deny users access to Administrator, PIN Management, Video & Phone Interpretation Request, Reports & Call Analysis, Inbound Access Setup Request, and Profile controls, check or uncheck boxes next to the feature. These operations give specific access permissions to a user:

- **Administrator** permissions enable a user to enable/deny permissions in User Administration, create new user profiles with customized access options, and provide Administrator Permissions to other users.

- **PIN Management** controls enable a user to create, manage, and modify PINs associated with your organization. This includes adding new PINs and PIN features such as PIN descriptions, language selection prompts associated with a PIN, PIN Tags, and PIN hold music options. Users with PIN Management controls can also view phones associated with specific PINs.

- **Phone and Video Interpretation Request** permissions enable a user to access phone and video interpretation services from the Voiance web site or from the Voiance mobile app for iPhone, iPad and Android devices. Permissions can be set to enable requests from specific account(s) or PIN(s).

  *Note: Video access is only available for video-activated accounts. If you are interested in setting up video access, please contact your account manager.*

- **Reports & Call Analysis** permissions enable a user to view data with filters such as Call Information, PIN Information and Tags, Language Usage, and Phone-Minute Usage. Reporting grants access to the Call Analysis and Reports sections of Account Management.

- **Inbound Access Setup Request** permissions enable a user to request a connection process which enables Limited English Proficient individuals to call your organization with an interpreter already on the line.

- **Profile** permissions enable a user to manage and modify their profile information and preferences.

- **Invoices** permissions enable a user to access, pay, view and print monthly invoices. This feature can only be turned on by Voiance.
View and Modify PINs

Access PIN Management by clicking the “PIN Management” link on the Account Management main page. If you have more than one account, the first account (in numerical order) will be displayed by default. You can search for other accounts by name or number in the Account field. You can also search for a PIN by number, description, programmed phone ID, or tag.

PIN Management permissions enable you to manage and modify PINs associated with your organization. This includes adding new PINs and PIN features such as PIN description, language selection prompts associated with a PIN, and PIN hold music options. Users with PIN Management controls can also view phones associated with specific PINs. Instructions and descriptions of these PIN controls are listed below:

To create a new PIN, click the “+New PIN” button. Type the desired 4-digit PIN number in the PIN field or use the auto-generate button to create a random PIN. Enter a PIN description in the description field, which is required for new PINs. Adding a PIN description helps identify PIN usage for easier location in reports and invoices. Example descriptions could be the name of a person, department, location, or a combination of each. Descriptions can be up to 30 characters. If you would like to create a new PIN with the same features as another PIN on the account, type the number you would like to clone in the clone field.

To make existing PINs easier to view in reports and invoices, create a PIN description by clicking the (pen) hover button in the Description section for the PIN you would like to change. Then enter the PIN description in the field provided and click ‘save.’

To view suspended PINs associated with an account, click the “Show Suspended” box.

To modify a PIN’s hold music, click the (pen) hover button in the Hold Option section for the PIN you would like to change. Then make your desired selection and click “Save.”

To create a PIN tag, click the (pen) hover button in the Tags section for the PIN you would like to change. Afterwards, create one or multiple tags for the PIN by clicking the “Add” button. Once finished, click “Save.”

Users can also view phones associated with each PIN in the Programmed Phone section if applicable.
Accessing a Video Interpreter

Users with Video Interpretation Request permission can access a video interpreter for their organization (must have video set up in-contract for this option to appear). You can access a video interpreter for American Sign Language and over 20 spoken languages.

1. Enter in Additional Session Information, if applicable.
2. Select language.
3. Click “Start Session”.

If you cannot see yourself in the Preview window:

- Right click on the Preview window.
- Click on “Settings” to open Adobe Flash Player Settings.
- On second tab, Privacy, click “Allow” and “Remember” to enable www.voiance.com to access your camera and microphone.
- Close the Preview window.

If you are having other issues with connecting to a Voiance video interpreter, please contact your account manager or Client Services at 1-800-481-3289 or support@voiance.com for troubleshooting.
Standard Reporting

Running a Report

To run and print reports for your account and PIN information, follow the instructions below:

1. Sign in to the Account Management main page.
2. Click on “Reports”.
3. Select the report you wish to view by clicking on its title. (Reports will automatically run for last full month.)
4. Change the report parameters to manipulate the content of your report data. Click the “View Report” button to refresh the report content after you’ve adjusted the parameters.
   a. Select the account from which you would like to pull data.
      (Most users will only have one account. You may also run reports using all accessible accounts or only those accounts which you choose to view by checking the box next to the account number in the drop down menu.)
   b. Change the Start/End Dates for when your report data is being calculated by typing in the new dates or clicking on the Calendar Icon to select a date.
   c. The time zone setting will adjust all call time detail in the report. Reports will automatically run in the time zone specified in your profile. (To change the time zone in your profile, see the Edit Profile section of this User Guide.) You can also change this setting for each report individually by selecting a time zone from the drop down menu.

   (NOTE: Run Time defaults to the time zone set in the user profile, however Run Time will change with the selection of time zone in the report parameters.)
Report Viewer

Search for Text or Data

1. Open the report of your choice, adjust the parameters as needed, and click on the button.
2. While in the report view, type the text or data you are searching for into the text box located in the parameter section of the report.
3. Click “Find” to find the item(s). The selected text will be highlighted where it first appears in the report. Click “Next” to see the next location of that data in the content of your report.

Export Your Data

Follow the directions to export your data into one of six available formats:

1. Open the report of your choice, adjust the parameters as needed, and click “Export”.
2. Select from the drop down menu the format into which you would like to export your data:
   - XML – Extensible Markup Language File - enables easy interchange of documents
   - CSV - Comma-Separated Variables - text files standard that can be imported into a database or Excel
   - TIFF - Tagged Image Format File - can be viewed by Windows Picture and fax viewer
   - PDF - Portable Document Format - opened by Adobe Acrobat Reader
   - Web Archive - MHTML Web Page Document - opened by any compatible web browser
   - Excel - Excel Worksheet - opened by Microsoft Excel
3. Save the file in the specified format.

Inserting Graphs into Other Documents

Complete the following steps to copy graphs into other documents:

1. Right-click on the graph in the report.
2. Select “Copy”.
3. Go to the document where you would like to insert the graph.
4. Go to the Edit menu.
5. Select “Paste Special”.
6. Choose to paste the object as Device Independent Bitmap.
7. Click “Okay”.

Learn more at www.voiance.com
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Call Analysis

Call Analysis enables users to view call information with our innovative Microsoft® Silverlight-powered Interactive Reporting tool. Users can analyze times, languages, tags and other information.

To access Call Analysis, click the link on the Account Management main page. Afterwards, enter your account number to pull up your organization’s data and click the data you wish to view.

- Call Analysis enables users to view call information in a few different ways:
  - Users can search call data by language, PIN, tagging, call information, call start time, day of week, time of day, or by utilizing the search box. In order to view and sort call data, click the box next to the desired sorting option(s). Afterwards, call data will appear based upon the sorting option(s) chosen.
  - Example: In order to search all Spanish language calls, click the Language section and then check the box next to Spanish. Afterwards, all of your Spanish language calls for the time period will be listed. Follow this method for all searches.
  - Once call data appears, users can specify search criteria by clicking on individual boxes to narrow down results. Simply click on the box you wish to view.
  - Users can view call data by grid or graph by clicking on the appropriate icon.
  - Users can also zoom in or zoom out on data by dragging the + - Bar.
Invoices
Invoicing permissions enable users to view and pay paperless, eco-friendly invoices.

To access Invoices, click the link on the Account Management main page. Your current and past invoices are displayed here. If you have more than one customer number associated to your profile, you can enter alternate customer numbers in the field provided and your invoices will appear.

Select the invoice you wish to view by clicking on the invoice number. The invoice cover page will appear in a separate window and can then be exported or printed. To view the Invoice Detail click on the hyperlinked Quantity number to view invoice details including call date and time, language, Interpreter ID, call length and call cost.

Pay Invoices Online
Select the invoice you wish to pay by checking the selected box and clicking Pay Online. Follow the steps to choose your method of payment and fill in the corresponding fields, review the amount details for each invoice you have selected, and verify that everything is correct and submit your payment.
Modify Your Profile

1. After you sign in, you’ll arrive on the Account Management home page. To begin modifying your profile information or change your password, click the Profile link.

2. Once on the Profile page, you can view and edit your personal information and settings to:

   - [Insert specific profile management options here]

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INVOICE

Voliance Sample Customer
1234 Street Rd.
City, ST 55555

Phone: 555-555-5555
Fax: 555-555-5556

To: Voliance Sample Customer
1234 Street Rd.
City, ST 55555

Due Date: 10/30/2015
Terms: NET30

Open PO No.

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Amount Exempt from Sales Tax: $26,910.00
Subtotal: $26,910.00
Tax: $0.00
Total: $26,910.00

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INVOICE DATE: 9/30/2015
BILLING START: 9/1/2015
BILLING END: 9/30/2015
RUN TIME: 10/27/2015 12:00:47 PM
RUN BY: Sample Data Account

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Learn more at www.voiance.com

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Inbound Access Request

Inbound Access Controls enable users to request access to our inbound calling platform, which enables LEP individuals to access an interpreter before calling your organization.

To access the Inbound Access Request page, click Inbound Access Request on the Account Management main page. Afterwards enter your information in the fields provided and click Submit Request.
Modify Your User Profile

1. After you sign in, you’ll arrive on the Account Management home page. To begin modifying your profile information or change your password, click the Profile link.

2. Once on the Profile page, you can view and edit your personal information and settings to:

   Interpretation Request

   Interpretation Request Controls enable you to submit an interpretation request from the web.

   To access the Interpretation Request page, click the Interpretation Request link on the Account Management main page. Enter your account and PIN numbers in the fields provided. Once logged in, fill out the fields provided and click Request Interpretation.

   Get an Interpreter

   1. Select the proper account. If you only have one account number, it will default and you will not see an account option.
   2. Enter your PIN
   3. Select a language.
   4. Enter a callback number. You can choose to receive an interpretation call on your mobile device or any other phone.
   5. Fill out any other required call information (These fields are displayed based on the PIN you entered).
   6. Optionally, fill out any of the optional call information.
   7. If all of the information you provided is valid, the Call button will be enabled.
   8. Press the Call button. If you requested a callback on your mobile device, activate your speaker-phone once you receive the interpretation call, or utilize the Additional Party feature to conference in another phone.

   You can also submit an interpretation request on your Android, iPhone, iPod, or iPad. Instructions on how to perform this operation and frequently asked questions are listed in the sidebar and following.

   Frequently Asked Questions

   What is a Callback Number?

   The Callback Number is the phone number that the Voiance system will dial. The person who answers this call will be connected to an interpreter. Enter your mobile phone number (iPhone, Android) or an alternative number for iPod, iPad.

   What is the purpose of adding an Additional Party (phone line)?

   If you are not using a dual-handset phone, you can add another phone to facilitate an interpretation session without the need to pass a receiver back and forth or use speaker-phone.

   Can I request a Callback on a phone number which requires an extension?

   All phone numbers must be 10 digits long.

   Can I schedule a callback for a specific time?

   You can currently only request an immediate callback.

   For additional information, assistance, or for a demonstration on how to use the mobile application, please contact your account manager.
Voiance Mobile App

Download
Search for “Voiance” in the App Store on your iOS device or the Android Marketplace on your Android device.

Sign In
1. Requires email address and password (can use same email address and password as Account Management).

Call Menu | Session Settings
2. Choose account
If you only have one account, it will be populated automatically.

3. Choose PIN
If you only have one PIN, it will be populated automatically.

4. Choose call fields
If there are custom call flow fields tied to an account/PIN combination, those will appear after selecting account and pin.

   If there is only one account and one pin and custom call flow fields are tied to that account/pin combination, those fields will appear automatically.

   Custom call fields can be required and/or optional and will be labeled as such.

5. Choose language
   Video languages are identified with a camera icon.

   Phone languages have no icon.

   Languages can be easily found by scrolling, using the letter jump on the right side of the screen, or by using the search function at the top of the screen.

Call Menu | Voice Call
6. After entering all session setting information, press the “Voice Call” button.

7. You will be given an option for an “Internet Call” or “Phone Callback”.

   Choose “Internet Call” if you wish to use VoIP to place voice call (use data plan).

   Choose “Phone Callback” if you wish to use cell phone or regular phone to place voice call.

8. If you choose “Internet Call”
   Call will be placed.

   Hold music and image will be displayed.

   Call can be canceled prior to being connected by pressing “Cancel” or the red phone “End Call” icon.

   Once call is connected you can toggle speaker-phone on/off, toggle mute on/off, or end the call.

   If you don’t see icons to toggle, simply tap the screen to activate the menu bar at the bottom of your screen. After a short period of time the menu bar will hide itself automatically.

9. If you choose “Phone Callback”
   You can choose a phone number from your contacts list, a recently used phone number, or you can enter a new phone number (Note that when selecting a number using “Choose From Contacts” that contains an extension, the phone number may not populate correctly).

   Once a phone number is chosen click “Send”.

   Our system will call back your desired number.

Call Menu | Video Call
After entering all session setting information press “Video Call” button.

- “Please Wait” message will be displayed while we connect you to an interpreter.

- You can cancel the call prior to being connected.
Voiance Mobile App (Cont.)

- Call can be placed as a voice call instead while waiting to be connected to interpreter.
  
  Press the red phone “End Call” icon and you will see two options to fall back to voice call. Choose “Internet Call” or “Phone Callback”.

- Call is connected to interpreter. You can switch cameras, toggle video on/off, toggle mute on/off, toggle thumbnail, end call.

  If you don’t see icons to toggle, simply tap the screen to activate the menu bar at the bottom of your screen. After a short period of time, the menu bar will hide itself automatically.

  During the call you can also choose to fall back to voice call. Press the red end call icon and choose “Internet Call” or “Phone Callback”.

- If call is not during supported business hours, you will receive a prompt stating “Sorry, you can’t use Video Call at this time, please choose Voice Call instead. Business hours for [language name] [business hours].”

History Menu | Call History

1. Recently placed calls will be shown in your call history with the following information:
   - Type of call
   - Length of call
   - Time of call
   - Date of call - calls grouped by date
   - Phone icon (voice calls)
   - Camera icon (video calls)

2. You can place a call from history by selecting the desired call from your history. The information for that call will be populated into the session settings screen in the Call Menu.

3. You can delete a call by swiping and pressing delete.

Settings Menu | Defaults

1. You can choose defaults for account, PIN, and language.

2. Setting default account
   - If you only have one account you will not have this option available.
   - If you have more than one account, select “Default Account”.

      Choose what account you want as your default.

      To clear default choose “Default Account” and click the trash can icon. Your default account will be reset and you will be placed back to the settings page.

3. Setting default PIN
   - If you only have one pin you will not have this option available.

      You need to set a default account before you can select a default pin.

      Once default account is selected choose “Default PIN”.

      Choose what PIN you want as your default.

      To clear default choose “Default PIN” and click the trash can icon. Your default PIN will be reset and you will be placed back to the settings page.

4. Setting default Language
   - Select “Default Language”.

Clear History

You can clear all items from your history by clicking “Clear Call History”.

Sign Out

Press “Sign Out” to sign out of the application.

Terms & Conditions

Click “Terms and Conditions” to read content about our Terms and Conditions.

About Voiance

Click “About Voiance” to read content about Voiance.

Also, application version information is found here.

Privacy Policy

Click “Privacy Policy” to read content about our Privacy Policy.

FAQ

Click “FAQ” to find answers to some frequently asked questions.

Additional Help

Please contact Client Services at 1 (800) 481-3289, at support@Voiance.com, or your account manager for additional help.
Modify Your User Profile

1. After you sign in, you'll arrive on the Account Management home page. To begin modifying your profile information or change your password, click the Profile link.

2. Once on the Profile page, you can view and edit your personal information and settings to:

Document Library

Document Library enables you to find important account-related documents that your account manager has shared with you.

Contact Voiance:

Phone: (866) 742-9080 | info@voiance.com | www.voiance.com
Mailing Address: Voiance | 5780 North Swan Road | Tucson, AZ 85718