Directory User Manual

Version 3.7.4

ALICE Receptionist
DIRECTORY USER MANUAL

Table of Contents

Chapter 1: System Overview

The ALICE Receptionist Directory is the most advanced office lobby greeting system available with a large range of features and options.

The ALICE Receptionist Directory (ARD) software is an automated office building greeting system which greets visitors to a building or lobby area and allows them to communicate with employees who are in the building, out of office, or located at remote facilities.

The ALICE Receptionist System consists of the ALICE Directory machine and the various Client applications that receive calls from the Directory. Communication methods between the Directory and Clients currently include: Audio-Only, 1-Way Video and 2-Way Video.

The ALICE Receptionist System offers companies a wide range of configurable options to control how visitors interact with the system and company employees.

Definitions

APPLICATIONS:

ALICE Receptionist Directory: (Also referred to in this document as the **Directory** or **ARD.**) The ARD is the Directory unit which is typically installed in the company's building foyer or lobby area. The minimum ARD unit configuration includes a touchscreen monitor/PC combination with an integrated or attached camera and speakers. The Directory requires an internet connection and/or a connection to the company's Local Area Network (LAN), depending on which communication options are in use.

ALICE Receptionist Client: (Also referred to in this document as the **Client** or **ARC.**) The Client is the software application that is installed on the user's computer to communicate with the visitors using the Directory.

ALICE Directory Configuration: This is the settings application that a company uses to configure and set preferences for their ALICE Receptionist Directory system.

ALICE Receptionist Web Admin Portal: This is the administration website that the ALICE Receptionist Administrator will use to configure system-wide and default settings.

ALICE Admin Application for Windows: This is the administration application that is installed completely on a company PC, as an alternative to the Web Admin Portal, to configure system-wide and default settings.

TERMS:

Visitors: These individuals interact with the Directory.

Users: (Also referred to in this document as **Employees.**) These are individuals, typically employees, who receive calls from the Directory and interact with visitors who are using the Directory.

Operator: The Operator is a designated single user assigned as the default contact who will receive calls from the Directory when the "Operator Mode" feature is enabled.

ALICE Receptionist Administrator: The individual within your organization who has been designated as the Administrator for the ALICE Receptionist system. This individual will have login credentials to the ALICE Receptionist Web Admin portal or the Admin App for Windows, as applicable.

Acronyms, Abbreviations

Admin = ALICE Receptionist Administrator
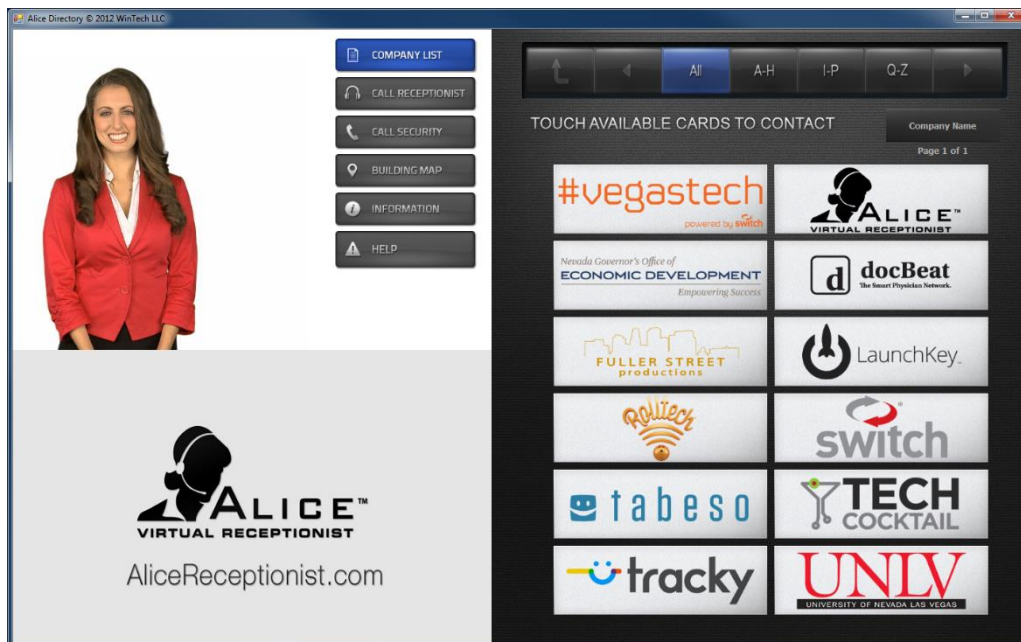
Admin Portal = ALICE Receptionist Web Admin Portal

Admin App= ALICE Admin Application for Windows

Directory or **ARD**= ALICE Receptionist Directory

Client or **ARC**= ALICE Receptionist Client

Chapter 2: ALICE Directory Interface

The ALICE Directory user interface is designed to present information in an attractive and intuitive manner.

The Alice Directory screen can be segmented into 4 sections, outlined below.
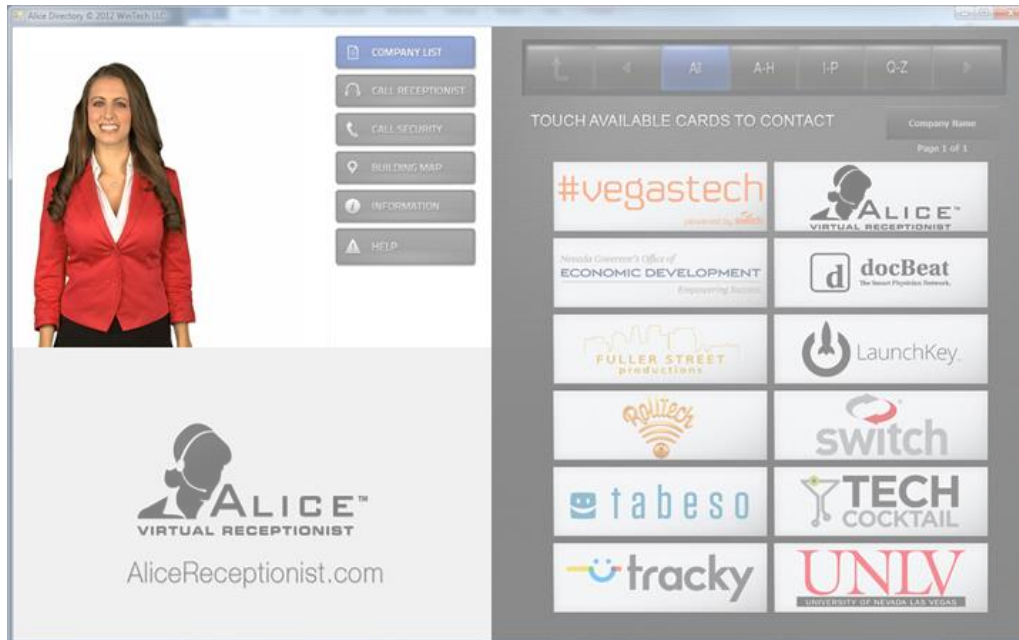
ALICE Video Section

The ALICE Video section of the Directory interface is where all ALICE video clips are played. This includes the pre-recorded ALICE videos as well as the live-streaming video displayed during a video call.

ALICE is configured to play a video of Alice waiting for visitor interaction before she starts providing information or connecting the visitor with an employee.

Main Menu Section

The Main Menu section consists of up to six (6) main menu buttons that remain static on the Directory screen at all times. These buttons provide visitors easy and quick access to the features that are most important for their experience with ALICE.

Configuring Main Menu Button

The Main Menu buttons are configurable and custom buttons can be defined by the ALICE system administrator for each company.

▶ **Company / Department / Employee**: There is only one fixed button on the menu. When this button is pressed, it will display a list of cards on the right of the screen for the building. The list of cards will either be a list of companies, departments, or employees for the building. As such the default caption of the first button will either be "**Company List**" "**Department List**" or "**Employee List**". The ALICE system administrator determines which of those directories will be displayed. The button can also be changed by the administrator.

This button behavior is based on the check boxes that are checked in the **Group and Sort Settings** on the **Layout** tab in the ALICE Configuration application.

- o **Show Company Directory:** If selected, a Card will be loaded for each organization configured in the ALICE Admin Portal or Admin App for your account.

- o **Show Department Directory:** If selected, a Card will be loaded for each Department configured in the ALICE Admin Portal or Admin App for your account.

- o **Show Employees By**: Employees are always listed in the Directory. You can specify the default sort order (alphabetical by first or last name) for the employees.

Configuring Optional Buttons

There are a number of optional buttons which can be turned on and off by the administrator. These buttons have a predefined behavior when pressed.

- ▶ **Call Receptionist:** This button will be displayed if the Receptionist option under **Display Buttons** on the **Menu Buttons** tab in the ALICE Configuration application has been checked.

- o The employee designated to be reached by this button will be assigned in the Admin Portal or Admin App. Select the Directory or Directories tab. In the list of Directories, choose the Directory you are configuring and select Edit. Assign an employee as the Receptionist in this window.

▸ **Call Security:** This button will be displayed if the Security option under **Display Buttons** on the **Menu Buttons** tab in the ALICE Configuration application has been checked.

- The employee designated to be reached by this button will be assigned in the Admin Portal or Admin App. Select the Directory or Directories tab. In the list of Directories, choose the Directory you are configuring and select Edit. Assign an employee as Security in this window.

▸ **Help:** This button will play the standard ALICE Help video. This is a short video (about 30 seconds) that provides a brief instruction to a visitor on how to use the system.

▸ **Events:** This button will display the Events screen. Configure the Events screen using the Events Tab in the ALICE Configuration application.

Custom Button Ideas

Custom buttons are buttons that the ALICE system administrator can create and configure. There are a number of different behaviors that a custom button can be configured for. These include:

- ▶ **Open a URL**

    - o   HTML Documents

    - o   Web pages

    - o   ALICE Widget

        - ▪   Photo gallery widget

        - ▪   Weather widget

        - ▪   Induction Screens

    - o   Interactive Wayfinding Map

- ▶ **Open Media File**

    - o   Images

    - o   Videos

In addition to being able to configure the custom button behavior, the administrator can configure the button caption, icon, position and appearance (colors). Below are some examples of custom buttons and how they would be configured:

- ▶ **Building Map**: When the Building Map button is pressed, an image will display that has been set in the ALICE Configuration application. This image can be of a building, campus or any other image the company wishes to display when the Building Map button is pressed.
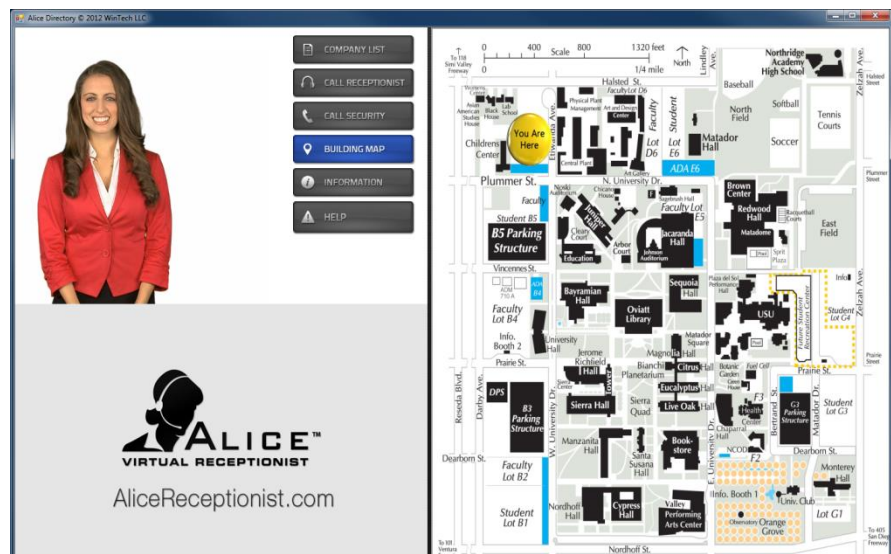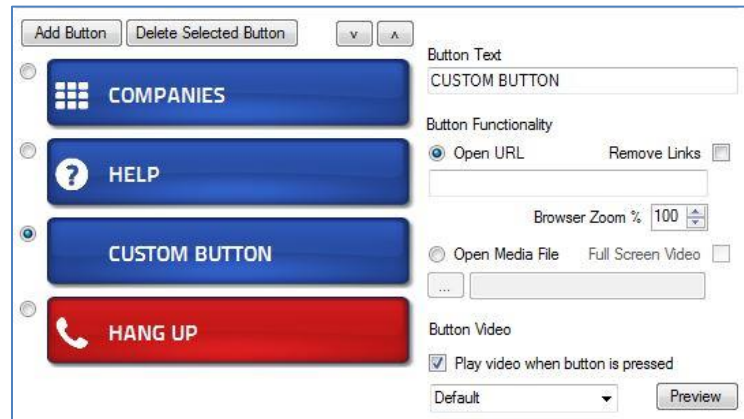
o This button is customized under the **Menu Buttons** tab by selecting "Add Button". Give the button a name under "Button Text" and then use the "Button Functionality" menu to set the website or image that will open when this button is pressed.

o Give this button additional customization by adding an icon next to the text.

o After you have created this button, it can be set as your home screen on the **Layout** tab of the ALICE Configuration settings. Instead of a Directory contact list shown on the right side of the Main Menu, the Building Map can be shown as the reset screen after a Visitor has interacted with the Directory.
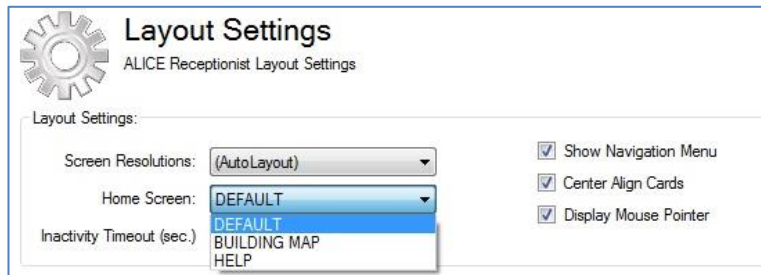
▸ **Information:** When the Information button is pressed, an image or website can be launched based on your settings in the ALICE Configuration application. The image or html site will load on the right side of the screen. Visitors can interact with any clickable area of the html page displayed.

o   This button is customized under the **Menu Buttons** tab by selecting "Add Button". Follow the same instructions as for adding a Building Map to customize this button or even set this as your home screen.

Navigation Menu Section

The Navigation Menu allows visitors to filter and navigate through multiple pages when there are more Contact Cards than will display on a single page.

There are seven (7) Navigation Menu buttons:

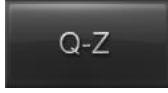|	
	This button only appears if the system has been configured to display Companies or Departments. When pressed it will return the user up one level.
	Move to the previous page of cards.
	Display all Cards (no filtering).
	Display only Cards A–H.
	Display only Cards I–P.
	Display only Cards Q–Z.
	Move to the next page of cards.

To assign whether this tool will be displayed on your Directory, access the **Layout** tab of the ALICE Configuration application. Uncheck the Show Navigation Menu option to remove the menu.
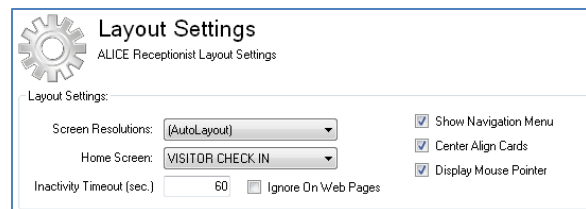
Contact Card Section

The Contact Card section is located on the right (or bottom in Portrait layout) of the screen. This contains the Contact Cards that a visitor can use to contact an Employee. If the Directory is for a multi-tenant building and Companies are turned on in the ALICE Configuration, a list of companies or organizations will be the top level shown in the Contact Card section. Users can simply click on the card for the company or organization they want to visit in order to see a list of employees for that group.

Once a Company card is pressed, a list of Employees for that company will be displayed.
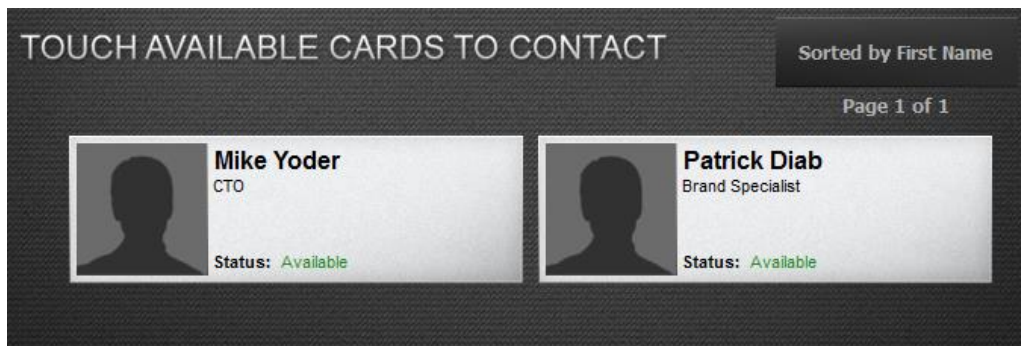
Card Actions:

Each Card can be configured for a Card Action Type. The Card Action determines the behavior of the card once it is clicked on. Valid Card Action Types and their behavior are as follows:

▸ None: This is the default behavior for Organization and Department cards. When Action Type is set to none on the Admin Portal the button will simply drill down to display a list of entities (departments or employees) that below to it.

▸ Call: For Organization and Department Cards this will call the employee assigned to as the Default Employee for this card. For Employee Cards, this will call the employee.

▸ URL: For all card types, this will open a Browser to the URL specified for the card

▸ Image: For all card types, this will display a static image on the Directory

▸ Video: For all card types, this will play a video on the Directory
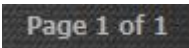
Additional features in the Contact Card section include:

Company Name

The **Sorted By** button:
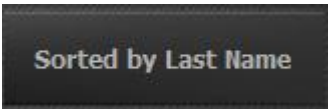
Sorted by Last Name

When Company cards are displayed, this will show **Company Name** instead of **Sorted By**.

Sorted by First Name

When Employee cards are displayed, this button can be pressed to toggle between **Sorted by Last Name** and **Sorted by First Name**.

Page 1 of 1

The Page Number label displays the current page and total number of pages available.

ALICE Receptionist
DIRECTORY USER MANUAL

Chapter 3: System Feature Highlights

The ALICE Receptionist System includes a long list of features that is constantly being added to and improved upon by the ALICE Receptionist team. Not all features are enabled for every installation. Companies determine which features suit their office environment at the time of purchase and the ALICE Receptionist System is configured to match their specific needs.

Should additional features be desired after the initial installation, this can be accomplished for most features by using the Admin Portal, Admin App, Configuration or Client applications.

The following is a list of highlighted features available within the ALICE Receptionist System:

Communication Preferences

The ALICE Directory can be configured to allow three (3) different forms of communication between the visitor and employee. Each communication option provides its own set of benefits and interaction experiences for both the employee and the visitor. These communication preference options are:

▸ **Phone (audio-only):** Employee and visitor communicate as they would during a normal phone call, with no video for either party.

  Interaction Experience: When the visitor touches a name on the Directory to call an employee, the Directory sends a call to the employee's designated phone number. The phone number can be any valid phone number including office, home, remote location or cell phone. The visitor's audio will be captured by the Directory camera and does not require the use of a phone.

▸ **One-Way Video:** The employee sees video of the visitor; the visitor does not see video of the employee. The employee's phone (office, home, remote location or cell phone) is configured to ring when the call comes in from the Directory and the employee can speak with the visitor over the phone while seeing the visitor using the ALICE Client application.

  Interaction Experience: When the visitor touches a name on the Directory to call an employee, the Directory sends the video of the visitor to the employee's ALICE Client application and the audio to the employee's phone. The employee will be able to view the visitor on the ALICE Client application at the same time their phone will ring with the audio portion of the call. To answer the call the employee simply picks up the phone call and clicks

the answer button on the ALICE Client application. When done, the employee simply hangs up the phone or presses the hang up button in the ALICE Client application.

▶ **Video**: Both employee and visitor can see and hear each other using video.

Interaction Experience: When the visitor touches a name on the Directory to call an employee, the Directory will send the video and audio of the visitor to the employee's ALICE Client application. If the employee accepts the call from the visitor, the employee's video and audio will be sent back to the Directory. Both the employee and visitor communicate with each other via live video streaming.

▶ **Split Call**: The employee sees video of the visitor and the visitor sees video of the employee. The employee's phone (office, home, remote location or cell phone) is configured to ring when the call comes in from the Directory and the employee can speak with the visitor over the phone while seeing the visitor using the ALICE Client application.

Interaction Experience: When the visitor touches a name on the Directory to call an employee, the Directory sends the video of the visitor to the employee's ALICE Client application and the audio to the employee's phone. The employee will be able to view the visitor on the ALICE Client application at the same time their phone will ring with the audio portion of the call. To answer the call the employee simply picks up the phone call and clicks the answer button on the ALICE Client application. The employees video will then show up on the ALICE Directory screen.

Setting an Employee's Default Communication Preference: Employees' default communication preferences are automatically recognized by the system based on the **Contact Number/Address** entry on the **Employee** or **Employees** tab on the Admin App or the Admin Portal. The Directory will use the selected communication preference for each user, allowing for a customized experience.

For **Audio-only communications**, the employee's phone number will be entered. For VoIP systems, only the employee's extension is needed. This field should include only the phone number, the extension, or the phone number plus extension.

Admin App

Admin Portal

For **Video communications** using the ALICE Client software, enter the SIP address:

Admin App

Admin Portal

For **One-Way Video communications** enter both your SIP address and the phone number that will be used for the audio portion of the call. The SIP address should go in the Phone / Extension field as shown here:

Admin App

Admin Portal

For Video or Audio calls to **3rd party softphones**, enter the SIP address. Please note that 3rd party softphones require the "Bria_sip:" at the beginning of the SIP address.

We recommend the use of the BRIA softphone by Counterpath if you choose to use a 3rd party softphone. The Bria softphone is available on iPhones, iPads, Macs, Android smartphones, Android tablets and Windows PCs.

Find pricing and information at http://www.counterpath.com/softphone-products.html

Motion Detection

Motion Detection enables the ALICE Directory to respond to detected movement in the area viewed by the ALICE Directory camera. The responsiveness of the Directory depends on various options selected by the Administrator that determine how their Directory interacts with visitors.

This setting can be enabled in the **Options** tab of the ALICE Configuration program.
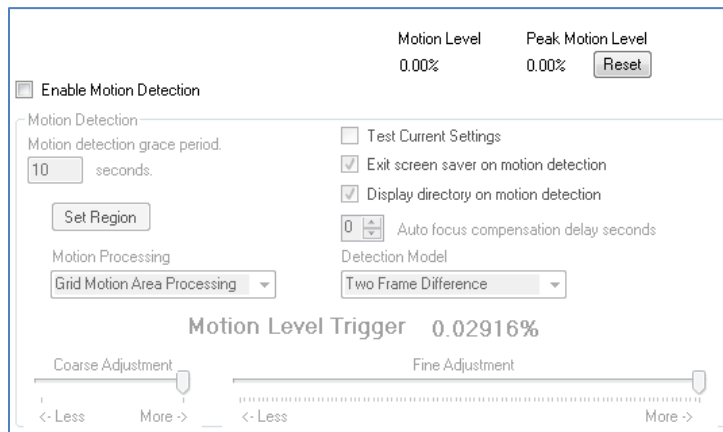
Configuring the Motion Detection behavior:

▶ **Motion Detection Grace Period:** This is the time period, in seconds, that the Motion Detection will wait after it has recognized a visitor before ALICE starts looking for movement again. We recommend this be at least 60 seconds to avoid having the same guest greeted multiple times. Depending on how quickly your visitors are met by employees and delivered out of the lobby area, you may want to increase this number to allow for more time.

▶ **Set Region:** Allow you to set the area viewed by the camera that you want to limit motion detection to.

▶ **Motion Processing:** Changes the type of processing used for motion detection.

▶ **Test Current Settings:** Check this option to turn on the camera and perform motion detection sensitivity testing. Each time the camera sees motion it will display a "Motion Detected" message.

▶ **Exit Screen Saver on Motion Detection:** Check this box to instruct the Directory to wake the machine when it detects a visitor. This allows the Directory to use a screen saver but still greet visitors as they walk up to the Directory.

▶ **Display directory on Motion detection:** This will cause the Company / Department or Employee directory to display when the Motion Detection senses movement, even when the Home Screen on the layout tab is set to something other than the Directory screen.

▶ **Auto focus compensation delay seconds:** Some cameras auto-focus every time they are turned on which causes false positive motion detection. To avoid this enter a number of seconds they system should delay before it starts looking for motion detection after the camera is turned on. 6 seconds is normally a sufficient amount of time.

▶ **Motion Detection Sensitivity:** Adjust the slider to set the sensitivity level for the Motion Detection. A higher number means motion will be picked up further away from the camera. A lower number means a visitor will need to get closer to the camera for the motion detection to be activated.

Other factors in the Directory behavior regarding Motion Detection:

▶ **Self Service Mode:** While in Self Service Mode, the standard behavior for a Directory that has Motion Detection enabled is to play the "Welcome" greeting video when the Directory identifies a visitor. The system then waits for the visitor to initiate a call to a contact listed in the ALICE Directory.

▶ **Operator Mode**: If the system is in Operator Mode, the behavior of Motion Detection is to immediately contact the designated Operator instead of greeting the visitor. A notification message will display on the screen while the Directory attempts to contact the Operator. Operator Mode is described in more detail in the following section.

Operator Mode

In Operator Mode, the ALICE Directory does not require the visitor to touch the screen to contact an employee. Instead, the Directory uses motion detection to recognize the visitor and automatically connects the visitor with a designated employee. This employee is referred to as the Operator. The following is a typical visitor experience with the Directory while it is in Operator Mode:

- ▶ Visitor enters building lobby.

- ▶ The Directory's motion detection sees the visitor and calls the employee who has been designated as the default Operator on the Admin Portal or Admin App.

  - o If the employee is setup for 1-Way or 2-Way Video they will see the visitor in the lobby.

  - o If the employee is set up for phone (audio-only) communication, the Directory will call the employee's phone.

- ▶ If the employee accepts the call, the Directory connects the visitor with the employee. This happens without the visitor initiating any interaction with the Directory.

Turning on Operator Mode:

The ALICE Receptionist Administrator can turn the Operator Mode on and off from the Admin Portal or the Admin App.

From the Admin Portal: Log in and select the desired Directory. Ensure that employees have been assigned to this Directory, and assign an employee to act as Operator from the drop down list. Then check the Operator Mode box and the Publish box. Complete the process by clicking Update. If the Publish box was not checked, these changes will be saved but they will not be transferred to the Directory. The next time the Directory is started it will operate in Operator Mode. To turn off Operator mode, unclick Operator Mode, click Publish, and select Update.

From the Admin App: Log in and select the desired Directory. Select an employee for the Operator Contact field and press the Update button to save your selection.
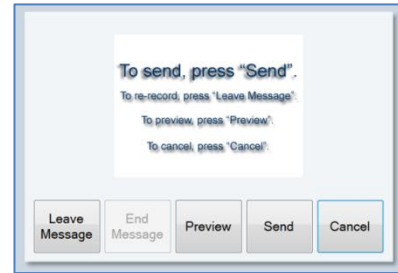
Video Mail

Visitors are able to record Video Mail messages that can be left for unavailable employees who are using the ALICE Client application.
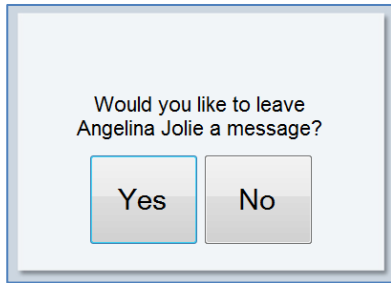
When a visitor attempts to contact an employee who is using the ALICE Client but the employee is not available or does not accept the video call, ALICE will ask the visitor if they would like to leave a video message.

If the visitor clicks **Yes,** they are instructed on how to leave a video message.

After the visitor records their video message, they can press the **Preview** button to review the video, press the **Send** button to send the video to the employee, or press the **Cancel** button if they decide not to send the video message.

If they press the **Send** or **Cancel** buttons they are asked to confirm their choice.
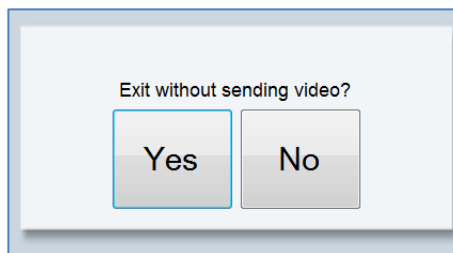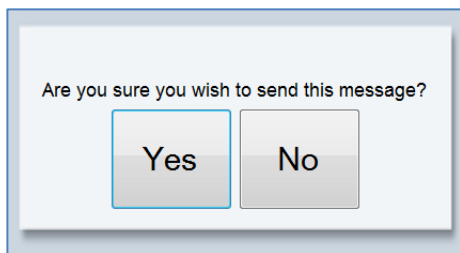
If the visitor confirms sending the video message, it will be delivered to the employee's email address. The employee can view the video by opening the video attachment in their email and playing it.

Employee Photos

The Directory has a number of layout options that can be configured in the Directory Configuration program. Most of those settings are explained in the Directory Installation Manual. Here we will cover one of these features, the ability to display employee photos on the employee cards in the Directory.

Employee pictures give the visitor a quick, visual way to locate the person they want to contact.

In order to display employee photos in the Directory, the employee photo files must be loaded on the Admin portal using "Manage Photo" button on the Employee Tab.

Considerations when loading employee photos:

▸ **Size:** Photos should be sized to 115x115 pixels.

▸ **Format:** All photos must be uploaded in a **.jpg** image format.

▸ When Show Photos is enabled, employees who do not have a valid photo file stored on the Directory will have the **no photo** image displayed on their card in place of an employee photo.

Turn Employee Photos On and Off

▸ To turn on employee photos, simply check the **Show Photos** check box on the **Layout** tab of the Directory Configuration program and restart the Directory. To turn this feature off, simply uncheck the check box and restart the Directory to activate the change.
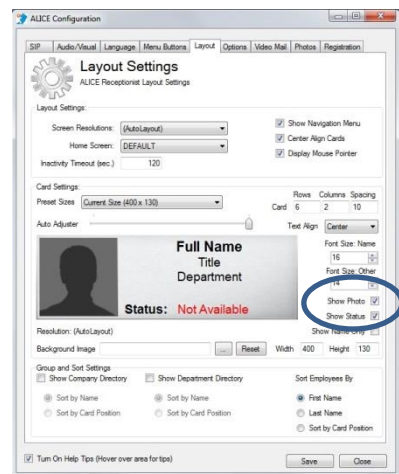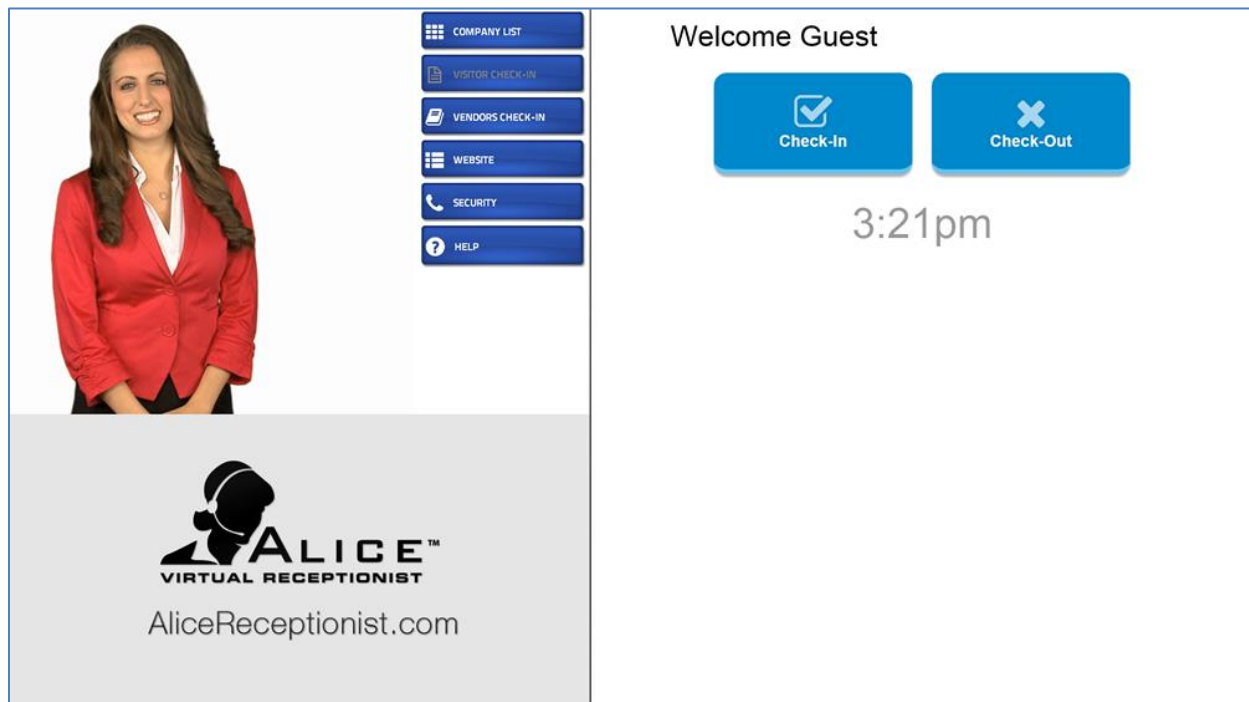
Visitor Check-In / Check-Out

The Visitor Check-in / Check-Out feature provides a way for visitors to Check-In and Check-Out of a building using the ALICE Receptionist system.

For details on configuring and using the ALICE Visitor Check-In feature see the ALICE Visitor Check-In manual.

ALICE Events

The Alice Events feature provides a way to display a list of the day's events on the ALICE Receptionist screen.
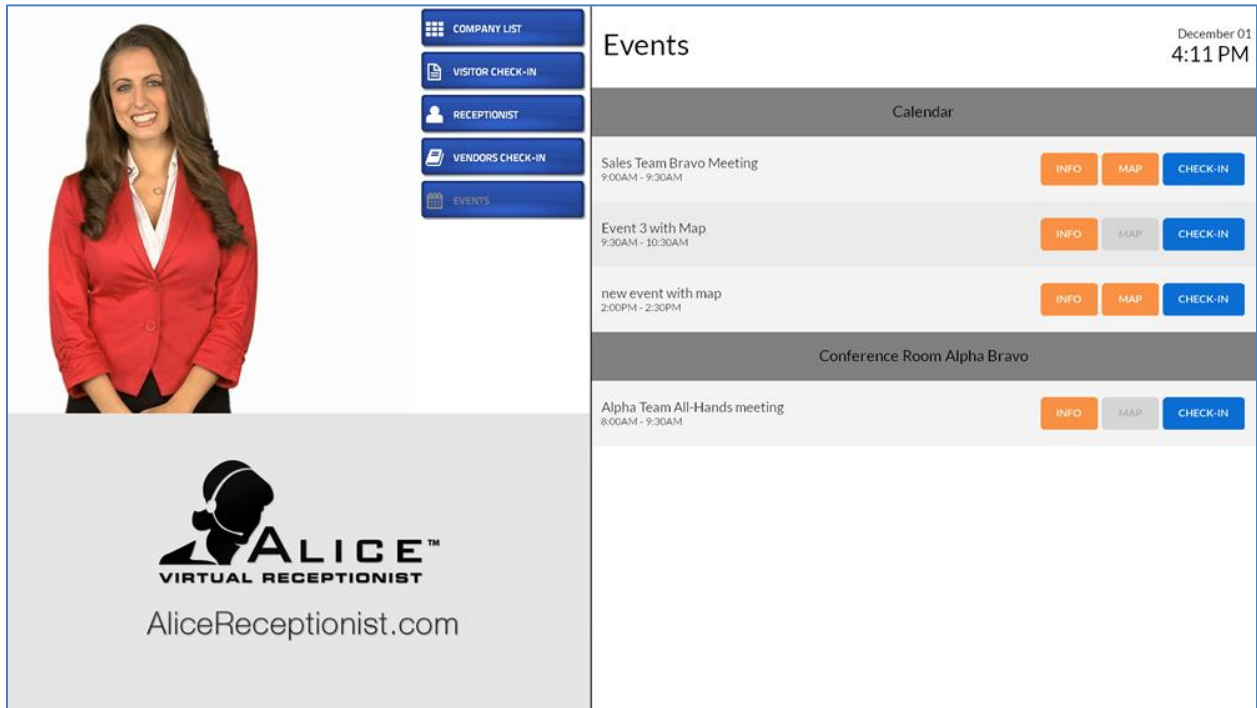

Events for the current day are imported from one or more MS Outlook or Google calendars and displayed on the ALICE Directory screen. Visitors can use the Events page, to view Event times, location, details and maps. If the ALICE Directory is configured to use the ALICE Visitor Check-In feature, that feature can also be launched from the Event list.

For details on configuring and using the ALICE Events feature see the ALICE Events manual.

Induction Screen Widget

The Alice Induction screens widget provides a way for businesses to control an visitor / vendor induction process for their buildings. Using the ALICE Induction widget, companies can collect information about the visitor, the organization they represent. The induction process also can display documents, videos and agreements which require the visitor's acknowledgement in order to complete the induction process. A record of the visitor's information and acknowledgements is recorded by the ALICE Receptionist system.
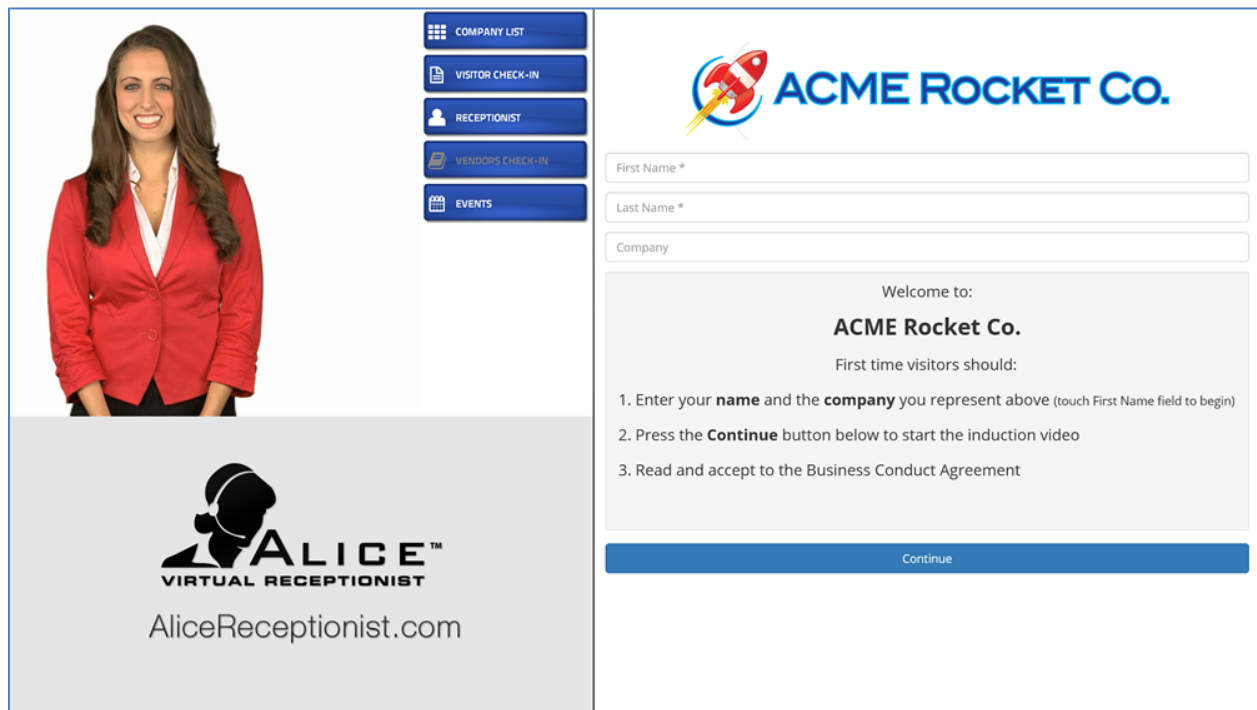
For details on configuring and using the ALICE Induction Widget see the ALICE Induction Widget manual.

System / Security Logs

The Alice system logs provide a way for businesses track information about who and how people are using the ALICE Receptionist system. The following tracking is available in the ALICE Receptionist system:

- **Usage Details:** Tracks what buttons are pressed on the ALICE Receptionist Directory screen.

- **Call Details:** Tracks the following information about every call that is initiated by the ALICE Directory:

  - Call Start Time

  - Length of Call

  - Number called

- **Visitor Images:** Captures 3 images of every visitor the camera sees when the Motion Detection feature is activated.

- **Visitor Check-In / Check-Out** logs: Tracks the following information for every visitor who uses the Visitor Check-in and Check-out feature.

  - Visitors Name

  - Employee Visited

  - Check-In Date / Time

  - Check-Out Date / Time

  - Check-in Type (Scheduled or Self Check-in)

Logging can be turned on in the Alice Directory Configuration application by opening the Options tab and selecting the information to track. Visitor Check-in / Check-out information is always tracked and does not have a check box to turn on or off.

Security Options
- ☑ Capture Usage Details
- ☑ Capture Call Details
- ☑ Capture Visitor Image

Conclusion

The features highlighted in this user manual only represent some of the more high-profile features of the ALICE Receptionist System. Information on these and other features can be found in the following documents:

- ALICE Receptionist Client User Manual
- ALICE Receptionist Client Installation Manual
- ALICE Receptionist Directory Installation Manual
- ALICE Receptionist Admin Portal Site Manual
- ALICE Receptionist Admin Application for Windows

Some of the features covered in these documents include:

ALICE Receptionist Directory

- Audio feedback sound
- On-premises mail server support
- Hosted mail server support
- On-premises VoIP phone support
- Hosted VoIP phone service support
- Audio call timeout configuration
- Employee list configuration
- Card layout configuration

ALICE Receptionist Client

- Communication Settings
- Startup preferences
- SIP Settings
- Alert sound preferences
- Status settings

ALICE Receptionist Admin Portal and Admin Application for Windows

- Company account management
- Directory management
- Employee management
- Department list management
- Position / Title list management
- Operator Mode
- Designate employee as operator
- Directory membership management