



# **Vocera Voice Server User Console Guide**

Version 5.3.1

# Notice

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## Getting Started

The User Console is a browser-based application you can use to enter profile information and customize settings. The profile registers you as a user on the system, and stores permissions and preferences that control how your badge works. Your profile is stored in a database on the Vocera Server.

The User Console also gives you some additional capabilities, such as the ability to create “buddies” and to send text messages to badges.

### Browser Requirements

To access Vocera Voice Web applications (Administration Console, User Console, Report Console, and Staff Assignment), your computer must have the following required software:

Table 1: Web application software requirements

Applications	Client-side component	Requirement
All applications	Browser	Internet Explorer version 10 or later.



**Important:** Do not install another JRE on the Vocera Server or Vocera Report Server machines. The required version of Java is installed with those servers.

### Browser Recommendations and Requirements

Learn other important recommendations and tasks to internet and browser security.

The list below includes the configuration recommendations for Internet Explorer security settings. Required items are flagged.

- **Do not access a Vocera Voice Web application from the server on which it is running** – By default, Windows Server 2008 and Windows Server 2012 ship with Internet Explorer Enhanced Security Configuration enabled, which may display frequent security prompts when you access a Web application from the server on which it is running. Rather than disable Internet Explorer Enhanced Security Configuration on the server, we recommend that you access Vocera Voice Server Web applications from your desktop or laptop computer.
- **Configure the Internet Explorer security level to Medium-low or lower** – Otherwise, Internet Explorer prevents the scripts used by the consoles from executing completely. You can configure security settings through **Tools > Internet Options > Security** in Internet Explorer. See your Internet Explorer documentation for complete information.
- **Required: Disable the pop-up blocker** – Vocera consoles display information in pop-up windows, so disable pop-up blocking in Internet Explorer (that is, configure the browser to allow pop-up windows). Choose **Tools > Internet Options > Privacy** and then uncheck the **Turn On Pop-Up Blocker** box. If you are using a third-party tool to block pop-ups, refer to the tool’s documentation.

- **Remove scroll bars from pop-up windows** – Pop-up windows may display scroll bars. To remove the scroll bars, choose **Tools > Internet Options > Security** and select the **Local Intranet** zone. Click **Custom Level** to display the Security Settings dialog box. Enable **Allow script-initiated windows without size or position constraints**.
- **Required: If necessary, add the Vocera Voice Server and Vocera Report Server IP addresses to the list of Trusted Sites** – The security policy in certain situations may prevent you from setting the Internet Explorer security level for the local intranet below Medium. If Internet Explorer continues to display pop-up windows with scroll bars, follow these steps to configure a trusted site for the Vocera Voice Server:

To add the Vocera Voice Server and Vocera Report Server to the list of trusted sites:

1. In Internet Explorer, choose **Tools > Internet Options**. The Internet Options dialog box appears.
2. Click the **Security** tab.
3. Click **Trusted Sites**.
4. In the **Security Level for this Zone** box, set the security level to Medium-low, and click **Apply**.
5. Click the **Sites** button. The Trusted Sites dialog box appears.
6. Type the IP address of the Vocera Voice Server, and click **Add**.
7. Type the IP address of the Vocera Report Server, and click **Add**.
8. Click **Close** to close the Trusted Sites dialog box.
9. Click **OK** to close the Internet Options dialog box.

A system administrator can manage the Internet Explorer Trusted Sites for an entire organization using Group Policy Objects (GPOs).

- **If your Vocera Voice Server or Vocera Report Server has enabled SSL, configure Internet Explorer to NOT save encrypted pages to disk** – If you enable SSL on the Vocera Voice Server or Vocera Report Server, you may need to update the browser security settings for Internet Explorer to make sure the browser does delete cached-from-HTTPS resources when the browser is closed. Otherwise, certain pages of the Administration Console, such as the Permission Browser, will not work properly.

**To update Internet Explorer security settings for SSL access:**

1. In Internet Explorer, choose **Tools > Internet Options > Advanced**
2. Make sure the **Do not save encrypted pages to disk** option is checked.
3. Click **OK**.

## Logging into the User Console

The User Console URL is either of the following:

- `http://vocera_ip_address/console/index.jsp`
- `https://vocera_ip_address/console/index.jsp`

where `vocera_ip_address` is the numeric IP address of the Vocera Server. Your Vocera administrator will tell you whether to use `http` or `https`.

Depending on how your Vocera system was configured, you can log into User Console using either Active Directory credentials or Vocera credentials.



**Note:** For convenience, set up a Favorites link (bookmark) in your browser for the User Console URL.

## Logging In Using Active Directory Authentication

When Active Directory authentication is enabled, the User Console welcome page has an additional field, the **Active Directory** list, which specifies the Active Directory to use for your login.

Use the following steps to log into the User Console using Active Directory authentication:

1. Open an Internet Explorer browser window.
2. Enter the User Console URL to open the User Console welcome page.
3. Specify the following values:

Field	Description
<b>User ID</b>	Enter your Active Directory user ID (up to 250 characters).
<b>Password</b>	Enter your Active Directory password (up to 127 characters).
<b>Active Directory</b>	Select the name of your Active Directory from the list. If there are multiple Active Directories listed and you're unsure which one to select, ask your system administrator.

4. Click **Log In**.  
The User Console appears.

### Logging In Using Vocera Authentication

If Active Directory authentication is not enabled, the **Active Directory** list does not appear on the User Console welcome page and you must log into the User Console using your Vocera credentials.

After you log into User Console using Vocera credentials the first time, make sure you change your password. See [Personal Information](#) on page 9.

Use the following steps to log into the User Console using Vocera authentication:

1. Open an Internet Explorer browser window.
2. Enter the User Console URL to open the User Console welcome page.
3. Specify the following values:

Field	Description
<b>User ID</b>	Enter your Vocera user ID. You must be a member of a Vocera group that has administrator privileges.
<b>Password</b>	Enter your Vocera password.

4. Click **Log In**.  
The User Console opens.

### Logging In and Self-Registering

The Vocera administrator may tell you to use Self Registration to create your profile. When Self Registration is enabled, a Register button appears on the User Console welcome screen.

Use the following steps to log into the User Console and self-register:

1. Open an Internet Explorer browser window.
2. Enter the User Console URL to open the User Console welcome page.
3. Click the **Register** button.




**Note:** If the **Register** button does not appear on the User Console welcome page, self-registration has not been enabled.

The Personal Information page appears.

4. Enter basic information to create your profile, as described in [Personal Information](#) on page 9.
5. Click **Save Changes**.

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## Overview of the User Console

The User Console opens to the Personal Information page, which is shown in [Personal Information](#) on page 9. To the left of this page is a navigation bar with buttons that provide quick access to the other pages in the User Console. These pages are described, in order, in this guide. You can also click the  button on any page or in any dialog box to get help on that topic.

Some pages have buttons that open dialog boxes. For example, when you click the Add Outside Buddy button on the Buddies page, it opens the Add Outside Buddy dialog box:

Dialog boxes have tabs that group complex information to make it easier to enter and understand. Most have both a **Save** and **Save & Continue** button.

- Clicking **Save** will save the data and close the dialog.
- Clicking **Save & Continue** will save the data and clear the fields, leaving the dialog open to allow faster entry of new information.
- If you click **Cancel**, or close the dialog without clicking **Save** or **Save & Continue**, the data showing will be lost.

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## Using the Documentation

Documentation is available from the User Console in PDF (Portable Document Format) format.

You must use the Adobe Reader, a free software program from Adobe Systems Incorporated, to view PDF documents. You can download the Adobe Reader or learn more about it on the [Adobe Reader](#) home page.

Use the following steps to view the Vocera documentation:

1. Click **Documentation** on the navigation bar.  
The Documentation page appears, displaying links to PDF versions of all the documentation.
2. Click a link to view each of the documents.  
The manual or instruction sheet opens in a separate window.

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## Displaying Help

The User Console provide context-sensitive help. To display help, click the **?** button on any console page.



## Basic Information

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The Basic Information screen lets you enter personal information, phone information, spoken variations of your name, and identifying phrases.

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### Personal Information

The Personal Information page lets you specify basic information such as a name, user ID, and password, as well as accounting information such as an employee ID and cost center ID.

Use the following steps to enter or change your personal information:

1. Click **Basic Information** in the left navigation bar.
2. Click the Personal Information tab to display the **Personal Information** page.
3. Enter or change your **First Name** and **Last Name** in the corresponding fields.  
The name must start with a letter or a digit. It must contain only letters, digits, spaces, apostrophes ('), underscores (\_), or dashes (-).



**Note:** The names you enter here determine the names that other Vocera users can speak to contact you. If some people refer to you by a different name, such as a nickname or a married name, make sure you also enter it as an Alternate Spoken Name in the Speech Recognition tab.

4. The **User ID** field displays the ID you use to access the User Console; other people may also use it to send an email message to your Vocera device. Your User ID uniquely identifies you to Vocera.  
Only a system administrator or tiered administrator can change the value in the **User ID** field.
5. Your system may optionally use a value in the **Employee ID** field to identify you to Vocera.  
Only a system administrator or tiered administrator can change the value in the **Employee ID** field.
6. If you want, enter a **Password** of five to 25 characters, and enter it again in the **Re-enter Password** field to make sure you typed it correctly. Letters, digits, spaces, periods, dashes (-), asterisks (\*), and underscore characters (\_) are allowed. The password is case-sensitive.  
A password is optional for User Console, but it may be required for Staff Assignment users, depending on the type of authentication used.
7. Enter your **Email Address**. When your email address is included in your user profile, other Vocera users can send voice email messages from their Vocera devices to your email address. See the [Vocera Badge User Guide](#) for information about sending and receiving voice email messages.



**Note:** Your administrator must configure certain Email settings to enable this feature.

8. Optionally specify a value in the **Cost Center** field.  
A cost center ID enables Vocera to track system usage by users and potentially allows an organization to charge for relative usage.

9. Optionally specify the conference you want to use in the **Conference** field. Click **Select**, choose from the list of available conferences, and then click **Finish**.

In a conference, your Vocera device has the push-to-talk quickness and convenience of a walkie-talkie. You can communicate with everyone in the conference instantly. Everyone in a conference can hear you, anyone in a conference can reply as soon as you release the Call button, and everyone hears the reply immediately.

Your system administrator must grant you permission to enter or leave a conference. See the [Vocera Badge User Guide](#) for complete information about conferences.

10. When you finish entering your personal information, click **Save Changes**.

## Phone

The Telephone Information page lets you provide telephone numbers and additional phone-related information for yourself. If your site has the telephony integration option enabled, entering telephone numbers provides a wide range of connectivity between your Vocera device, on- and off-site telephones, and pagers:

- You can forward calls from your Vocera device to any of the numbers that you enter. If you forward calls when these fields are left blank, the Genie tells callers that the number is not available.
- You can choose to use either the Desk Phone number or the Vocera Extension to route outside calls and calls made from the Smartphone keypad to your Vocera device. In addition, you can use a voice command to transfer calls to your Desk Phone number.
- Either the Desk Phone number or the Vocera Extension is displayed on a pager with the Vocera system number when you send someone a page. The person who receives the page can return your call, enter your extension at the Vocera system Genie prompt, and be connected directly to your Vocera device.

The system administrator must grant you permission to forward calls to telephones and to receive pages.

Use the following steps to enter phone information:

1. Click **Basic Information** in the left navigation bar.
2. Click the **Phone** tab to display the **Telephone Information** page.
3. Optionally specify any of the following values on the Telephone Information page:

Table 2: Telephone information fields

Field	Description
Desk Phone or Extension	<p>Enables the following features:</p> <ul style="list-style-type: none"> <li>• Lets you forward or transfer calls from your Vocera device to your desk phone.</li> <li>• If no Vocera Extension is specified, allows outside callers to connect to your Vocera device by entering the your desk extension at the Vocera hunt group prompt, instead of saying your name.</li> <li>• Allows you to send a page and receive the return phone call from a person you paged on your Vocera device.</li> <li>• If users have appropriate permission and have been enabled to access the Genie from a phone, the Desk Phone or Extension field allows users to be authenticated by Caller ID when they call the Vocera hunt group number.</li> </ul> <p>See <a href="#">Working with Phone Numbers</a> on page 36 for complete information about entering phone numbers.</p>

Field	Description
Cell Phone	Lets you forward calls from your Vocera device to your cell phone. If you have appropriate permission and have been enabled to access the Genie from a phone, the Cell Phone field allows you to be authenticated by Caller ID when you call the Vocera hunt group number. See <a href="#">Working with Phone Numbers</a> on page 36 for complete information about entering phone numbers.
Home Phone	Lets you forward calls from your Vocera device to your home phone. See <a href="#">Working with Phone Numbers</a> on page 36 for complete information about entering phone numbers.
Pager	Lets you receive calls on your pager from other Vocera users who issue the "Send a Page" voice command. See <a href="#">Working with Phone Numbers</a> on page 36 for complete information about entering phone numbers.
Vocera Extension	Lets you route calls made to this virtual extension to go to your Vocera device instead. If the Vocera Extension field is filled in, it is used for <ul style="list-style-type: none"> <li>• Direct dialing from Smartphone keypads</li> <li>• Paging callbacks</li> <li>• Vocera hunt number access</li> </ul> If you leave this field blank, Smartphone users and outside callers can dial your desk phone to be routed to your Vocera device. See <a href="#">Working with Phone Numbers</a> on page 36 for complete information about entering phone numbers. Because the Vocera extension is a virtual phone number, you can put any number in the Vocera Extension field. If a user already has a desk phone number, you can reuse that number for the Vocera Extension field but prepend a digit, such as 8, to make the number unique in the Vocera system.
PIN for Long Distance Calls	Lets your organization authorize telephone usage and distribute telephone costs among different users, departments, or sites.
Phone Password	Password used to authenticate you when you access the Genie from a phone. The Phone Password must be five to 25 characters consisting of letters or numbers. Special characters are not allowed. Do not enter your regular Vocera password that you use to log into the User Console.
Re-Enter Phone Password	Retype the same password you entered in the Phone Password field.

#### 4. Click **Save Changes**.

## Speech Recognition

When another user issues a command to call you, leave a message for you, locate you, and so forth, the Vocera system software analyzes the name the caller spoke and matches it to the text in the First Name and Last Name fields of your profile.

The Speech Recognition page provides a way for you to enter variations of your name, to increase the Genie's ability to recognize you when someone is speaking your name.

Use the following steps to enter variations of your name:

1. Click **Basic Information** in the left navigation bar.
2. Click the **Speech Recognition** tab to display the Speech Recognition page.
3. Your first and last names, entered on the Personal Information page, are automatically used for speech recognition. If you are called by any other names, enter them in **Alternate Spoken Names** as follows:
  - If you are called by one or more variations of your name (**Bob Jones** and **Rob Jones**, in addition to **Robert Jones**, for example), enter each variation in a different field.

- If your name has an unusual pronunciation, and you find that the system is having trouble recognizing it, enter an Alternate Spoken Name that is spelled as your name is pronounced, rather than as it is usually spelled. For example, if the system does not recognize your name as **Jodie Dougherty**, you could enter **Jodie Dockerty**.
4. Optionally enter an **Identifying Phrase** that distinguishes you from others who have the same name or a name that sounds alike. For example, if there are two Mary Hills on the system, but you are on the third floor and the other is on the first floor, you could enter **Mary Hill on the first floor** as your Identifying Phrase.

Vocera also uses departments to differentiate among users with the same names. Departments are usually easier to set up and use than identifying phrases. See **Personal Information** on page 9.
  5. Click **Save Changes**.

## Preferences

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Your Vocera administrator specifies many behaviors and settings for your badge. For example, your administrator specifies whether you hear an alert tone when you receive a message or when you have new (unplayed) messages waiting.

If your administrator does not automatically override your personal settings, you can use the Administration screen to customize these settings.

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### Genie Settings

Genie Settings personalize your interactions with the Vocera Genie.

Use the following steps to change Genie Settings:

1. Click **Preferences** in the left navigation bar.
2. Click the **Genie Settings** tab to display the Genie Settings page.
3. Select a **Genie Persona**. The Genie Persona selection determines the speaker of the prompts you hear when you interact with the system. To hear a sample of a persona, click the speaker icon next to the selection.
4. Select a **Genie Greeting**. The Genie Greeting is what you hear when you press the Call button. Select **Tone Only** to be greeted with a short tone, **Speech Only** to hear the spoken greeting ("Vocera"), or **Tone and Speech** to hear the combination of tone and speech.
5. In the **Call Announcements** section, select a ring tone from the list and then click the speaker icon next to the tone to hear a sample.



**Note:** Starting with 5.0 release, you cannot select **Ring-Tone -15** to **Ring-Tone -17**. If you had previously selected one of these ring tones, your setting is reset to the system default during the upgrade process.

6. If you want to hear who is calling the badge, check **Announce Caller's Name After Tone**. (It will take additional time to connect each call.)



**Note:** Announce Caller's Name After Tone is especially useful if you uncheck **Auto Answer for Incoming Calls**, because you are then given the opportunity to reject calls. When you reject a call, the caller is told that you are not available.

7. If you sometimes receive a call made to a group that you belong to and you would like the Genie to identify the group that was called and the group's site (if it is different from caller's site) to set the context of the call, check **Announce Name of Called Group**.
  8. Click **Save Changes**.
- 

### Notifications

Notifications control many of the badge sounds you hear, and enable or disable certain automatic operations.

Use the following steps to change Notifications:

1. Click **Preferences** in the navigation bar.
2. Click the **Notifications** tab to display the Notifications page.
3. Choose any alerts you want to enable in the **Alert Tones** section:
  - Check **On/Off Network Alert** when you want to hear a warning tone when the badge moves out of the range of your wireless network. (You can also monitor the network signal strength by looking at the badge display.)  
If you normally move between buildings, and the network does not cover the outdoor spaces, you might not want to hear an audible alert.
  - Check **Low Battery Alert** if you want the badge to tell you when the battery needs to be recharged. The warning will be repeated at intervals until you change the battery. (You can also monitor the battery level by looking at the badge display. In addition, the LED at the top of the badge will blink fast red when the battery is low.)
  - Check **Text Message Alert** to hear a tone when you receive a new text or email message. The tone sounds only once for each new message.
  - Check **Voice Message Alert DND Mode** to hear an alert tone when you receive a new voice message. The tone sounds only once for each new message. If you also enable Missed Call Notification (see below), you will **not** hear a tone whenever a verbal notification is given.
  - Check **Disable Alert Tones** to suppress all alerts when you put the badge in Do Not Disturb mode.
4. Choose any reminders you want to enable in the **Reminders** section. When you set up reminders, your badge periodically plays a tone to notify you when you forget to pick up messages or when you are in Do Not Disturb mode for a long period of time.
  - Check **Text Message Reminder** to hear a tone every 15 minutes until you pick up new text messages.
  - Check **Voice Message Reminder** to hear a tone every 15 minutes until you pick up new voice messages.
  - Check **DND Reminder** to hear a tone every 15 minutes when your badge is in Do Not Disturb mode.
5. Choose any notifications you want to enable in the **Automatic Notifications** section. Automatic notifications allow you to bypass certain operations without confirming them.
  - When you place your badge in a battery charger, **Auto Logout When Badge in Charger** sends a message to the Vocera server to log you out and then turns off the badge's power. This is useful in situations where badges are shared; when the battery gets low, you can place the badge in an eight-bay charger, take a fully charged badge out of the charger, and immediately log in to the charged badge.  
If you do not log in using voice commands (that is, you have a dedicated badge and are logged in all the time), the power on the badge will turn off when you place the badge in the charger, but you will not be logged off.  
If Auto Logout When Badge in Charger is disabled, the badge power remains on and you stay logged in to the server while the battery is charging. This is convenient when you want to use the badge while it is sitting in a single-bay charger.
  - **Auto Answer For Incoming Calls** connects callers immediately, without asking you whether or not you want to take the call. If you need all your calls to be connected quickly, you can enable this feature.
  - When you press the Call button on your badge, **Missed Call Notification** announces the names of callers who unsuccessfully tried to call your badge since the last time you pressed the Call button, and tells you who left messages.
  - **Disable Voice Message Notifications** causes the Genie to suppress notifications when you receive a message. However, you may still hear a voice message alert tone (if the Voice Message

Alert option is selected), and a telephone icon appears on the badge display when you have unplayed voice messages.

6. Click **Save Changes**.

## Miscellaneous

Use the miscellaneous options control the behavior of the Play Messages commands and the call setup.

1. Click **Preferences** in the navigation bar.
2. Click the **Miscellaneous** tab to display the Miscellaneous page.
3. Use the **Messaging** fields to control the behavior of the “Play messages” command. Check an option to enable it; uncheck an option to disable it.

Plays messages in the order in which they are received. If you leave this option unchecked, messages will be played in reverse order (newest first).



**Note:** Urgent messages will be played before non-urgent ones in any case.

Genie states the time and date each voice message was sent during message play.



**Note:** Even if you don’t choose this option, you can always hear the time a message was sent by pressing the Call button and saying “Time” during or just after the message is played.

Genie states the time and date each text message was sent.

Plays unread voice mail messages after you issue the **Logout** command and before you are logged out. If you have unread voice messages, Genie announces the number of messages and asks if you want to play them before you log out. If you answer yes, Genie begins to read the messages. Unread voice mail messages are played just as when you say, **Play voice messages**. If a message was sent to a group, Genie announces the name of the group called.

Cancel the message playback by pressing the DND button on the Badge.

This is useful in case you have a response which needs to be communicated to another colleague or otherwise addressed before you leave your shift.

Specifies whether you want to take advantage of fast call setup.

- If you check **Fast Call Setup**, a call is connected as soon as the recipient accepts it.
- If you do not check **Fast Call Setup**, the Genie always completes the call announcement to you before connecting the call. If the recipient has a long name, this can cause a brief delay before the call is connected.



Controls the way the badge plays call and message announcements when you are using a headset (or managed lanyard):

- When checked, plays incoming call and message announcements through the badge speaker when a headset is plugged in. If you select this feature, only the **announcement** plays through the speaker; the actual call or message then plays through the headset.
- When unchecked, plays both the announcement and the call or message through the headset.

**Using a Headset with your Badge** -When a headset is plugged into the badge, all audio plays through the headset by default. Consequently, if you don't wear your headset all the time, you may not hear an incoming announcement, and you may not know that someone is trying to contact you.

If you select **Announce Through Speaker**, you can leave your headset plugged in, and simply put it on to communicate after you hear the announcement. If you turn on **Announce Through Speaker** and you are wearing your headset when a call comes in, you may not hear an announcement in a noisy environment (because it plays through the speaker); however, you will still hear the call or message through the headset.



**Note:** When your headset is not plugged in, all calls, messages, and announcements play through the speaker, as usual, regardless of the **Announce Through Speaker** setting.

Specifies whether you want to allow the use of voice commands to accept or reject calls. Enabling buttons-only answering is useful in certain high-noise environments. When checked,

- You may accept or reject incoming calls only by pressing the Call or DND/Hold button.
- The "Yes" and "No" voice commands to accept and reject incoming calls are disabled.
- Uncheck **Accept Calls Using Buttons Only** to accept or reject a call with either voice commands or buttons.

For example, background noise can cause poor speech recognition in some situations, resulting in the Genie repeatedly saying "I'm sorry, I didn't understand". In other situations, background noise can cause the Genie to prematurely accept or reject calls without user input.

#### 4. Click **Save Changes**.



## Reminders

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You can use the **Reminders** page to add, edit, or delete text reminders. The character limit for a single text reminder is 115 character. You can add, edit, or delete reminders for yourself and for multiple recipients. Multiple recipients include individual users as well as Groups or a combination of both.



**Note:** Your administrator specifies the permissions that allow you to add, edit, or delete reminders for other recipients or groups. If you don't have these permissions, you can only add or edit reminders for yourself.

When adding a text reminder, you can also add a recurrence pattern to it. You can choose to have your reminders to recur hourly, daily, weekly, or monthly. All reminders must have a start time and date. Recurring reminders should include a start time, start date, end date, and end time.

Reminders are created in the time zone specified for your Site. Your system administrator specifies a time zone for your Site. For example, if you belong to a Site that follows **Pacific Standard Time** time zone, all your reminders are created in this time zone.

You can listen to text reminders on your Vocera badge using the supported voice commands, refer to **Listening to Messages** section in the **Vocera Badge User Guide** for additional information on the voice commands and usage.



**Note:** The **Reminders** page will not display any reminders that you may have recorded using voice commands from your badge.

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### Adding or Editing a Text Reminder

You can use the Reminders page to add a text reminder.  
To add a text reminder:

1. Click **Reminders** link in the left navigation bar. The **Reminders** page appears.
2. Click **Add Reminders** to display the Add Reminders page
3. Click the **Select Recipients** button to display the Select User or Group dialog box.

To select multiple names, hold down the Ctrl key while you click your selections. You can also use the **Search** to find a user group..



**Note:** Your system administrator is responsible for assigning permissions required to add or edit text reminders for other recipients or groups. If you don't have these permissions, you can only add or edit reminders for yourself.

4. (Optional) If you accidentally selected multiple recipients and you want to remove a recipient from the list, select the name of recipient or Group and click the **Delete** button.
5. Enter up to 115 characters long text in the **Message** field.
6. Choose a type of reminder, **Recurring** or **Non Recurring**.
  - If you chose **Recurring**, enter a Start Date and End Date as well as a Start Time and End Time.

- If you chose **Non Recurring**, enter a Start Date and Time.

Dates must be entered in the default format set for your system and Time must be entered in **Hour Minute AM/PM** format.

7. Select a recurrence pattern from the **Frequency** drop down list.  
You can choose one of the following recurrence patterns: Hourly, Daily, Weekly, or Monthly.
8. Click **Send** button to send or save your text reminder.

## Editing a Text Reminder

To edit a text reminder:

1. Click **Reminders** link in the left navigation bar. The **Reminders** page appears.
2. Choose a reminder that you want to edit and click **Edit Reminders**  
The Edit Reminders page appears.
3. Click the **Select Recipients** button to add more recipients.  
To select multiple names, hold down the Ctrl key while you click your selections. You can also use the **Search** to find a user group..



**Note:** Your system administrator is responsible for assigning permissions required to add or edit text reminders for other recipients or groups. If you don't have these permissions, you can only add or edit reminders for yourself.

4. Click **Delete** button to remove a recipient or a group from your list.
5. Edit your text message in the **Message** field.
6. Choose a type of reminder, **Recurring** or **Non Recurring**.
  - If you chose **Recurring**, enter a Start Date and End Date as well as a Start Time and End Time.
  - If you chose **Non Recurring**, enter a Start Date and Time.

Dates must be entered in **mm/dd/yyyy** format and Time must be entered in **Hour Minute AM/PM** format.
7. Select a recurrence pattern from the **Frequency** drop down list.  
You can choose one of the following recurrence patterns: Hourly, Daily, Weekly, or Monthly.
8. Click **Send** button to send or save your text reminder.

## Deleting a Text Reminder

You can delete a text reminder you created for yourself or for other recipients from the Reminder page.



**Note:** Your system administrator is responsible for assigning permissions required to add, edit, or delete text reminders for other recipients or groups. If you don't have these permissions, you can only add, edit, or delete reminders for yourself.

To delete a text reminder:

1. Click **Reminders** link in the left navigation bar.  
The Reminders page appears.
2. Select the reminder that you want to delete from the Reminders page.  
You can only select one reminder at a time.
3. Click the **Delete Reminder** button.  
The system will display a confirmation dialog box, "Are you sure you want to delete this reminder? (This action cannot be undone)"
4. Click OK to confirm. Your reminder is deleted.

## Call Blocking

---

Use call blocking to select which other users can get through to your badge. You can choose to accept or block calls from any user or group. For example, you might choose to accept only calls from certain individuals if you are in a meeting.

Like DND mode, Call Blocking prevents other users from reaching you. It gives you more flexibility than DND, however, because you can select exactly the users or groups of users you want to block or accept. Also, whereas DND mode automatically ends the next time you press the Call button, your Call Blocking settings remain effective until you explicitly change them.

The Call Blocking page has two lists: one for people whose calls you want to accept, and one for people whose calls you want to block. The Call Blocking Default setting list applies to people who does not appear in either list.

---

### Blocking Calls

Use the Call Blocking page to block all calls or accept calls only from specific people.

1. Click **Call Blocking** in the navigation bar. The Call Blocking page appears.
  2. Select **Block calls from anyone not listed above** as the Call Blocking Default.
  3. To block calls from everyone, click **Save Changes**. All calls are now blocked.
  4. To accept calls only from specific individuals or groups, click the **Add Name** button below the Accept Calls From list. The Select User or Group dialog box appears.
  5. Choose users or groups whose calls you want to accept and click **Finish**. The names appear in the Accept Calls From list.
  6. Click **Save Changes**.
- 

### Accepting Calls

You can use the Call Blocking page to accept all calls or block calls only from specific people.

To accept all calls, or to block calls only from specific people:

1. Click **Call Blocking** in the left navigation bar. The Call Blocking page appears.
2. Select **Accept calls from anyone not listed above** as the Call Blocking Default.
3. To accept calls from everyone, click **Save Changes**. All calls are now accepted.
4. To block calls from specific individuals or groups, and accept calls from everyone else, click the **Add Name** button below the Block Calls From list. The Select User or Group dialog box appears.
5. Choose users or groups whose calls you want to block and click **Finish**. The names of the blocked callers appear in the Block Calls From list.
6. Click **Save Changes**.

---

## Blocking Calls From Specific Group Members

Use the Call Blocking page to select the default call blocking behavior for anyone not listed on the page.

1. Click **Call Blocking** in the left navigation bar. The Call Blocking page appears.
2. Select **Accept calls from anyone not listed above** as the Call Blocking Default.
3. Click the **Add Name** button below the Block Calls From list. The Select User or Group dialog box appears.
4. Select the group whose calls you want to block and click Finish.
5. Click the **Add Name** button below the Accept Calls From list. The Select User or Group dialog box appears.
6. Select the names of the group members whose calls you want to accept and click Finish.
7. Click **Save Changes**.

---

## Blocking Calls With Voice Commands

If your administrator has given you the Block and Accept Calls permission, you can also control call blocking from your badge:

- **To block calls**, press the Call button and tell the Genie to “Block all calls” or “Block all calls except from (and then speak the names of the exceptions).”
- **To accept calls**, press the Call button and tell the Genie to “Accept all calls” or “Accept all calls except from (and then speak the names of the exceptions).”

When you block or accept calls from your badge, the settings in the User Console change to match.

## Call Forwarding

---

Call Forwarding options determine when and where calls are forwarded. No Forwarding means the Vocera server will prompt the caller to leave a message.



**Important:** The system administrator must grant you permission to forward calls. In addition, you can forward calls to a phone number only if the Vocera system has been integrated with the telephone system. If you set forwarding options without the proper permissions, your calls are blocked—they are not forwarded, and they are not put through.

Use the following steps to choose Call Forwarding Options:

1. Click **Call Forwarding** in the left navigation bar to display the Call Forwarding page.
2. Click to select one of the following methods:
  - **No Forwarding** means the Vocera server will prompt the caller to leave a message.
  - **Forward To Company Voice Mail** transfers unanswered calls to the voice mailbox associated with your desk phone.
  - **Forward To Another Device, Group, or Address Book Entry** automatically forwards unanswered calls to the badge of another user or to the phone of someone in the address book. If you choose this method, click **Select**, choose the user, group, or address book entry to whom you want to forward your calls from the list that appears, and then click **Finish**.
  - **Forward To Desk Phone**, **Forward To Cell Phone**, and **Forward To Home Phone** forward calls to the corresponding number listed on your Personal Information page.
  - **Forward To Another Number** allows you to enter the number to which you want to forward calls. See [Working with Phone Numbers](#) on page 36 for details about entering phone numbers.
3. Choose when to forward calls:
  - **All** forwards all calls. Your badge will not ring.
  - **Unanswered** forwards any calls you do not answer, for any reason.
  - **Offline** forwards all calls you receive when you are out of range of the network or are logged off.
4. Click **Save Changes**.

## Buddies

---

A buddy is someone you can call by using a nickname in a voice command, or a friend who is not in the Vocera system. You can assign a special ring tone to each buddy, and you can give buddies VIP status.

VIP status means that calls will be put through even if you blocked all calls or put the badge into Do Not Disturb mode. If one of these conditions is in force, the Genie asks the buddy if the call is urgent. If the buddy says “Yes,” the Genie puts the call through.

There are two types of buddies: outside buddies and inside buddies. An **outside buddy** is one you contact only by calling a telephone from your badge, or by sending email messages from your badge to an email account. An **inside buddy** is another badge user, a group, or an address book entry. You contact an inside buddy the same way you contact anyone with the badge.



**Important:** The system administrator must grant you permission to place phone calls. In addition, you can call a phone number only if the Vocera system has been integrated with the telephone system.

---

### Adding a Buddy

You can use the Buddies page to add or edit a buddy:

1. Click **Buddies** in the left navigation bar. The Buddies page appears.
2. Click **Add Buddy** or select an existing buddy in the list and click **Edit Buddy**.  
The Add/Edit Buddy dialog box appears.
3. Click the **Select** button to display the Select User, Group, or Address Book Entry dialog box, choose an item from the list and click **Finish**.  
The Select User, Group, or Address Book Entry dialog box closes, and the name you chose appears in the Add Buddy dialog box.
4. Use the **Nickname** field to specify the name that you want to use when you call this buddy.



**Important:** All the names you enter in the User Console must start with a letter or a digit. They must contain only letters, digits, spaces, apostrophes ('), underscores (\_), or dashes (-).

5. Choose the **Ring Tone** that you want to be played to notify you that this buddy is calling. To hear a sample of each ring tone, select the ring tone from the drop-down list and then click the speaker icon next to the list.
6. Check **Buddy Has VIP Status** if you want this buddy to be able to call you even when you are blocking calls or in Do Not Disturb mode.
7. Click **Save** to save the buddy information and return to the Buddies tab, or click **Save and Continue** to save this buddy and begin to add another buddy.

## Adding an Outside Buddy

Use the Buddies page to add or edit an outside buddy.

1. On the Buddies page, click **Add Outside Buddy** or select an existing outside buddy and click **Edit Buddy**. The Add/Edit Outside Buddy dialog box appears.
2. Use the **First Name** and **Last Name** fields to enter your buddy's name.
3. Use the **Nickname** field to enter the name that you want to use when you call this buddy.
 **Important:** All the names you enter in the User Console must start with a letter or a digit. They must contain only letters, digits, spaces, apostrophes ('), underscores (\_), or dashes (-).
4. If Vocera is integrated with your phone system, use the **Phone** field to enter your buddy's telephone number. See [Working with Phone Numbers](#) on page 36 for details on entering phone numbers. Your system administrator must grant you permission to call outside numbers.
5. Optionally enter the telephone number for your buddy's pager in the **Pager** field. See [Working with Phone Numbers](#) on page 36 for details about entering phone numbers.
 

If Vocera is integrated with your phone system, you can send your buddy a page from your badge. Your buddy's return call is connected directly to your badge—you do not have to wait for someone to find you. You must have a **Desk Phone or Extension** defined in your user profile to receive the return call on your badge. See [Personal Information](#) on page 9.
6. Use the **Email Address** field to enter your buddy's email address, if you want to send email with voice message attachments to this buddy.
 **Note:** Your administrator must configure certain Email settings to enable this feature.
7. Click **Save** to save the new buddy profile and return to the Buddies tab, or click **Save and Continue** to save this buddy and begin to add another buddy.

## Deleting a Buddy

Use the Buddies page to delete buddies.

1. Click the **Buddies** link on the left navigation bar. The Buddies page appears.
2. Select the buddy name from the list and click **Delete**.  
The buddy is removed from your list.

## Calling a Buddy

To call a buddy, press the Call button, wait for the Genie to answer, and then tell the Genie to "Call (the buddy's nickname)".

Table 3: Commands for calling a buddy

Action	Recommended Commands (Examples in Italics)	Alternate Forms
Calling a buddy	Call <i>Smitty</i> .	Find <i>Smitty</i> .Contact <i>Smitty</i> .

If VIP status is enabled in your user profile, the buddy will be notified of your message immediately, even if he or she put the badge in Do Not Disturb mode, or issued a command to block calls.

Note that you can use an inside buddy's nickname in any command, not just for Calls.

## Send Text

---

Send a text message to the display on another badge user or to all members of a group using the **Send Text** feature.

Your administrator can control whether text messages will be received by group members working at a different site. For example, if a user in a Trauma Team group at site A is working at site B at the time a text message is sent to that group, the user working at site B would not receive the message. the exception is that users in the Global group will always receive group messages.

1. Click **Send Text** link in the left navigation bar. The **Send Text** page appears.
2. To choose the recipient(s), click the **Select Recipient** button. The Select User or Group dialog box appears.
3. Choose the users and groups to whom you want to send the message.  
To select multiple names, hold down the **Ctrl** key while you click your selections. To select a range of names, click the first name in the range and then hold down the **Shift** key and click the last name in the range.
4. Enter up to 11 characters of text in the **Subject** field.
5. Enter up to 115 characters of text in the **Message** field.
6. Click **Send**. (To cancel the message, click **Reset**.)



## Working with Groups

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Groups provide a way for internal or external callers to communicate with badge users based on their roles within an organization.

For example, groups let you call someone who fits a specific role (“Call a sales person”), belongs to a certain department (“Call Accounts Receivable”), or has some other skill or authority that the caller requires (“Call a manager”).

Groups also provide a way to broadcast to specific set of users at the same time (“All cashiers to the front, please”) or to leave messages for many users at once (“Send a message to Nursing Assistants”).

Members of certain groups have **management capabilities** for other groups. For example, the members of the Charge Nurse group may manage the Code Blue group in a hospital, or members of the Head Cashier group may manage the Cashier group in a retail store.



**Note:** You use the Groups page in the User Console, as well as voice commands, to manage groups. You will see entries in the **Group Name** list only if you are a group manager. The rest of this chapter is relevant to group managers only. If you are not a group manager, continue with the next chapter.

---

### About Group Management

If you are a member of a group with management capabilities, you can do any of the following tasks:

- Change all of the basic information except the group name and the site.  
The basic information includes alternate spoken names and other speech recognition features, scheduling options, and the group phone extension.
- Specify whether to use the group as a department, enter a PIN for telephony, and enter a cost center ID.
- Add and remove group members, change their order, and specify whether the group has only temporary membership.
- Change the forwarding options.
- Specify a group whose members can add themselves to the managed group.
- Maintain the list of members in the associated conference group.

Members of a group with management capabilities can use voice commands to add and remove members from the managed group. For example, a member of the Head Nurse group that manages the Code Blue group could issue the following commands:

- Add Lin Ma to Code Blue
- Remove Cardiologists from Code Blue

Refer to the [Vocera Badge User Guide](#) for more information on these voice commands.

Often, these voice commands are the only features a group manager needs to use. However, all the tools for managing a group are available through the Edit Groups page of the User Console. This page appears in the User Console only if you are a member of a group that has permission to manage another group. The rest of this section shows you how to use the Edit Groups page.



**Note:** If you are a group manager and also a tiered administrator, you can use the Administration Console to perform both group management and tiered administrator tasks.

## Group Call Forwarding

Groups determine the call forwarding that is possible within your organization. A combination of options lets you handle almost any forwarding scenario your organization requires, including chains that pass a call from one group to another until some individual is available to answer it.

For example, suppose a call—either an internal call from a badge, or an external call, when telephony is enabled—is directed to the Radiology group in a hospital. When you create or modify the Radiology group, the forwarding options you select let you handle this situation in any of the following ways:

- **Never forward**  
Calls directed to Radiology are routed to an available member. If no member is available, the caller is prompted to leave a message.
- **Forward only when a group member is unavailable**  
Calls directed to Radiology are first routed to an available member. If no member is available, the call is then forwarded to a badge, group, address book entry, or phone number.  
For example, if no one in the Radiology group is available, you may want to forward the call to the Imaging group. Similarly, if no one in Imaging is available, you may want to forward the call to a desk extension or address book entry that is always available.
- **Always forward, even if a group member is available**  
Calls directed to Radiology are forwarded immediately. Group members are never contacted directly.  
For example, you may want to route calls to the Radiology group directly to a desk extension. Individuals in the group can then be contacted only by name.

Do not confuse the call forwarding options you can specify for a group with the call forwarding options a group member can specify. Call forwarding for a group determines the call flow through an entire organization; call forwarding for an individual member is more of a courtesy or convenience.

Call forwarding for a group occurs only when a call is directed to a **group** (“Call Radiology”), not to one of its **members** (“Call Roberta Verdi”). If Roberta Verdi is a member of Radiology, calls that are placed directly to Roberta are forwarded according to the options she specifies through voice commands or the User Console. Similarly, when a call is placed to Radiology, the group properties determine where the call is forwarded, and the forwarding options specified by individual members are ignored.

## Groups and Departments

A **department** is a special type of group that is related to the structure of the organization using the Vocera system. By designating a group as a department, you provide accounting features and speech recognition enhancements that are not available to other Vocera groups.

For example, suppose the Midtown Medical Center has units such as Pediatric Nurses and Pediatric Physicians. If your Vocera configuration has corresponding groups, it makes sense to designate those groups as departments. Users at Midtown Medical Center can then take advantage of the extended accounting and speech recognition features of these Vocera departments.

## Departments and Voice Commands

Departments are a convenient way to let badge users contact each other with voice commands. When a caller specifies a department in a voice command, Vocera can:

- Differentiate among users with the same first and last names.  
For example, if your organization has two individuals named John Smith, a user can issue the voice command “Call John Smith in Tech Support”.
- Identify a badge user when the caller knows the first name and department, but not the last name, of other people in the organization.  
For example, a caller can issue the voice command “Call John in Tech Support”.

In addition to departments, you can also use identifying phrases to differentiate among users, as described in [Speech Recognition](#) on page 11. However, departments are usually easier to set up than identifying names, and more natural for users to work with.

### Departments and Accounting

Implementing Vocera departments optionally allows an organization to distribute system usage and telephony costs among different divisions:

- A telephony PIN authorizes members of a Vocera department to make toll phone calls and allows an organization to charge departments for those calls.
- A Cost Center ID enables Vocera to track system usage by department and potentially allows an organization to charge its departments for relative usage.

### About Instant Conferences

The conference feature provides badges with “push-to-talk” communication that simulates the behavior of a walkie-talkie. While you are in a conference, you can instantly communicate with other users in the same conference by pressing and holding the Call button—you don’t have to wait for speech recognition or Genie interactions.

Vocera supports a practically unlimited number of conferences. Many conferences can be active at the same time, with different users in each one. Users within the same conference can interact with one another.

Every group has a conference associated with it. For example, if your site has groups called Managers and Cashiers, users automatically have access to conferences with those names. Although users can be in multiple groups simultaneously, each user can be in only one conference at any time.

Users do not need to be group members to **use** a conference; however, they need the **Conference** permission to **enter** or **leave** a conference. The Vocera administrator can assign users to conferences and also remove them. If you are a group manager, the User Console lets you maintain the user list for conferences associated with your groups.

### Maintaining Group Information

Use the Edit Groups page to maintain group information.

1. Click **Groups** in the navigation bar.  
The Groups page appears, displaying the list of groups that you can manage.
2. Choose a group name in the list and click Edit Group, or double-click the Group name.  
The Group Information page of the Edit Group dialog box appears.



**Note:** The **Search** field lets you type as quickly as you want, and the field displays a list of possible matches that is progressively filtered with every additional character you enter.

## Basic Group Information

The Info page of the Edit Group dialog box lets you maintain the telephone extension for the group, alternate names for the group and its members, and scheduling options. The Info page appears when you select a group and click **Edit Group** on the Edit Groups page (see [Maintaining Group Information](#) on page 27).

The values in the **Group Name** and **Site** fields are greyed out to indicate that you cannot change them. Only the Vocera Administrator can change the name of a group or its home site.

Use the following steps to maintain basic group information:

1. In the **Phone Extension** Field of the Info page, assign a telephone extension to the group. See [Working with Phone Numbers](#) on page 36 for details about entering phone numbers.  
If Vocera is integrated with your phone system, outside callers who dial the Vocera system number can connect to the group by entering the group extension at the Genie prompt, instead of saying the group name.
2. In the **Speech Recognition** fields, optionally change the names that badge users can speak when they call the group.
  - In the **Member Name — Singular** field, enter a name that describes a member of the group. For example, in the group called **Sales**, a group member could be known as **a sales person**. This allows the Genie to recognize a command such as “Call a sales person.”
  - In the **Member Name — Plural** field, enter a name that collectively describes the members of the group. For example, in the group called **Sales**, the collection of group members could be called **all sales people**. This allows the Genie to recognize a command such as “Send a message to all sales people.”
  - In the **Alternate Spoken Group Name** field, you can enter a variation of the group name. For example, some people might say “The Sales team” instead of Sales. If you enter **the Sales team** as an Alternate Spoken Group Name, the Genie recognizes “Call the sales team.”
3. Use the **Scheduling Options** fields to specify how calls to the group are routed:
  - Choose **Sequential** if you want one person to be the main contact. The second member in the list is called only if the first person is not available, a third member is called only if the first two are unavailable, and so forth.



**Important:** The order in which names appear in the Group Member Name list on the Members tab is important when you choose Sequential scheduling.

- Choose **Round Robin** if you want calls to be distributed as evenly as possible among group members. When you choose round robin, Vocera iterates through members in the group until someone accepts the call; however, the person who most recently accepted a group call is tried last.
4. Do either of the following:
    - Click **Save** to close the Edit Group dialog box and return to the Edit Groups page.
    - Click another tab in the Edit Group dialog box to maintain additional group information.

## Department Groups

The Department page of the Edit Group dialog box lets you specify a group as a department and enter a telephony PIN or Cost Center ID for accounting purposes. The Department page appears when you click the **Dept** tab in the Edit Group dialog box (see [Maintaining Group Information](#) on page 27).

Use the following steps to specify department properties:

1. Optionally check **Use this Group as a Department** to specify that the group you are editing is a department group.  
If you check this field, the **PIN for Long Distance Calls** and **Cost Center** fields become available.

2. Optionally specify a value in the **PIN for Long Distance Calls** field.  
A telephony PIN authorizes members of a Vocera department to make toll phone calls and allows an organization to charge departments for those calls.
3. Optionally specify a value in the **Cost Center** field.  
A Cost Center ID enables Vocera to track system usage by department and potentially allows an organization to charge its departments for relative usage.
4. Do either of the following:
  - Click **Save** to close the Edit Group dialog box and return to the Edit Groups page.
  - Click another tab in the Edit Group dialog box to maintain additional group information.

## Group Members

The Members page of the Edit Group dialog box lets you maintain the membership of a group. The Members page appears when you click the **Members** tab in the Edit Group dialog box (see [Maintaining Group Information](#) on page 27).

Group membership can change over time. The **Manager On Duty** might change from shift to shift, as might the membership of the **Code Blue Team**. Users who are granted the permission **“Add/Remove Me From Group” Voice Command** can add themselves to a group or remove themselves from a group by issuing a command to the Genie.

A group can include any number of users, and can even include other groups. For example, the Company group may consist of all the department groups in your organization.

Use the following steps to manage members:

1. To add members to the group, click **Add Name**, then select the members from the list that appears.
2. When you are done, click **Finish**. The Select User or Group dialog box closes, and the names you selected appear in the Group Member Name list.
3. To remove a name from the list, select it and click **Delete Name**.
4. To change the position of a name in the list, select it and click **Move Up** or **Move Down**.



**Note:** The order of names matters only if sequential scheduling is selected in the Scheduling tab.

5. Optionally check **Remove Users on Logout** to specify that membership in the group is temporary. When you check this field, Vocera automatically removes users from the group when they log out, but leaves the rest of the user profile in the database. Users are **not** added into the group automatically when they log back in.
6. Do either of the following:
  - Click **Save** to close the Edit Group dialog box and return to the Edit Groups page.
  - Click another tab in the Edit Group dialog box to maintain additional group information.

## Group Forwarding

The Forwarding Options page of the Edit Group dialog box lets you maintain forwarding information for the group, including when to forward calls and the party to whom calls should be forwarded. The Forwarding Options page appears when you click the **Forward** tab in the Edit Group dialog box (see [Maintaining Group Information](#) on page 27).

Use the following steps to maintain group forwarding:

1. Optionally change forwarding values as follows:

Table 4: Changing forwarding values

To forward in this situation	Do this
Never forward	Check <b>No forwarding</b> .
Forward only when a group member is unavailable	<p>Select either of the following values to specify the party to whom you want calls forwarded:</p> <ul style="list-style-type: none"> <li>Check <b>Forward to Another Device, Group, or Address Book Entry</b>, then click <b>Select</b> and choose from a list of all possible values in the system.</li> <li>Check <b>Forward to Another Number</b>, then enter the number you want the call transferred to. See <a href="#">Working with Phone Numbers</a> on page 36 for details about entering phone numbers.</li> </ul> <p>Then check <b>Unanswered</b> in the <b>Forward When</b> section.</p>
Always forward, even if a group member is available	<p>Select either of the following values to specify the party to whom you want calls forwarded:</p> <ul style="list-style-type: none"> <li>Check <b>Forward to Another Device, Group, or Address Book Entry</b>, then click <b>Select</b> and choose from a list of all possible values in the system.</li> <li>Check <b>Forward to Another Number</b>, then enter the number you want the call transferred to. See <a href="#">Working with Phone Numbers</a> on page 36 for details about entering phone numbers.</li> </ul> <p>Then check <b>All</b> in the <b>Forward When</b> section.</p>

See [Group Forwarding](#) on page 29 for more information about the forwarding situations.

- Do either of the following:
  - Click **Save** to close the Edit Group dialog box and return to the Edit Groups page.
  - Click another tab in the Edit Group dialog box to maintain additional group information.

## Group Permissions

The Permissions page of the Edit Group dialog box lets you determine whether the members of a group of users can add themselves as members to a group that you manage. You can also view the permissions that the Vocera Administrator has granted the group you are managing; however, you cannot change these permissions.

The Permissions page appears when you click the **Permissions** tab in the Edit Group dialog box (see [Maintaining Group Information](#) on page 27).

Use the following steps to manage permissions:

- If you want to let members of a group add themselves to the group you are managing, click the **Select** button under **Group of users permitted to add themselves to this group**, choose the group that has this permission, then click **Finish**.  
The Group Permissions page displays the name of the group with management permissions.
- Do either of the following:
  - Click **Save** to close the Edit Group dialog box and return to the Edit Groups page.
  - Click another tab in the Edit Group dialog box to maintain additional group information.

## The Group Conference

The Conference page of the Edit Group dialog box lets you maintain the list of users who are in the conferences for the groups you manage. The Conference page appears when you click the **Conference** tab in the Edit Group dialog box (see [Maintaining Group Information](#) on page 27).

Use the following steps to manage conferences:



1. If you want to add users to the conference, click **Add Name**, select the users from the list that appears, then click **Finish**.  
The Conference page displays the names you selected in the Conference Users list.
2. Do either of the following:
  - Click **Save** to close the Edit Group dialog box and return to the Edit Groups page.
  - Click another tab in the Edit Group dialog box to maintain additional group information.

## Using the Groups Permission Browser Page

As a Vocera user, you can quickly see the groups to which you belong and the permissions granted to you for each group.

To use this function, you must have system administrator privileges for the group. If you log in and do not see any groups or permissions listed, you do not have the correct permissions. Contact your Vocera system Administrator.

The Permission Browser displays the permissions you are granted and those revoked for the groups to which you belong. You can also use the Permission Browser to additional permissions and manage permissions for other users in your groups.

*To browse the permissions for a user or group:*

1. Log into the Vocera User Console as a user with system administration privileges.
2. Click **Groups** in the left navigation bar.
3. Select the **Permission Browser** tab to display the **Permission Browser** page.
4. Under the **Membership Hierarchy Browser** list, click **Add Name** to display the **Select User Or Group** dialog box.
5. Select a user, group, or site you want to modify, and then click **Finish**.
6. You may add as many users and groups as you want to see in the **Membership hierarchy Browser**.
7. When you select a group, site, or user from the list, the current permissions for that group, site, or user are shown in the **Permissions** panel.
8. Use the buttons adjacent to the **Permissions** panel to **Grant** or **Revoke** permissions, and **Clear** to reset all permissions and start over.
9. Be sure to save any changes you make before leaving the **Permissions Browser**.
10. Log out and log back in for permission changes to take effect.

## Recording Names for a Group

When prompting users who want to call or leave a message for a group, or when confirming these commands, the Genie will say either the group name, or a variation of the group member name, depending on the situation. In the absence of recorded names, the Genie will use text-to-speech generation to say the appropriate name. To ensure more natural-sounding prompts, you can record group names that will be substituted for the synthesized speech.

To record group names, press the Call button, wait for the Genie to answer, and then tell the Genie “Record names for (group name)”. The Genie will then walk you through the steps to record the group name and the variations of the group member name.

Table 5: Recording names for a group

Action	Recommended Commands (Italics indicate an example)	Alternative Forms
Recording name prompts for a group	Record name for <b>Technical Support</b> .	Record name prompts for <b>Technical Support</b> .

## Entering Spoken Names

As you create users, groups, and other entries in the Administration Console or the User Console, Vocera requires you to provide names.

These names are more than just a tag to let you visually identify an entry when you are using one of the consoles—they are words users can speak when placing calls, and they are words that the Genie speaks in interactions with badge users. Because all Vocera names have speech recognition consequences, the exact way you enter them in the console is very important.

The following table lists all the name fields in Vocera:

Table 6: Spoken name fields

Dialog Box	Name Fields
Add/Edit Site	<ul style="list-style-type: none"> <li>Site Name</li> <li>Alternate Spoken Site Name</li> </ul>
Add/Edit User	<ul style="list-style-type: none"> <li>First Name</li> <li>Last Name</li> <li>Alternate Spoken Names</li> <li>Identifying Phrase</li> </ul>
Add/Edit Group	<ul style="list-style-type: none"> <li>Group Name</li> <li>Member Name - Singular</li> <li>Member Name - Plural</li> <li>Alternate Spoken Group Name</li> </ul>
Add/Edit Location	<ul style="list-style-type: none"> <li>Location Name</li> <li>Alternate Spoken Location Name</li> </ul>
Add/Edit Address Book Entry	<ul style="list-style-type: none"> <li>First Name</li> <li>Last Name</li> <li>Name</li> <li>Alternate Spoken Names</li> <li>Identifying Phrase</li> </ul>

The rest of this appendix shows you how to use these name fields to create spoken names that are intuitive and meaningful for users.

## Rules for Entering Names

The value in any name field must start with a letter or digit.

It must contain only the following characters:

- Any of the 26 English letters, in lower or upper case
- Digits, such as 0, 1, 2, 3, and so forth
- Spaces
- Apostrophes (')
- Underscores ( \_ )
- Dashes (-)

## Names and Speech Recognition

The speech recognition system uses the values you enter in name fields to identify **entities** (users, groups, sites, locations, and address book entries).



Any name that a user speaks in a badge command must appear in one of the name fields so the speech recognition system can identify it.

Each of these entities has one or more primary name fields (for example, **First Name** and **Last Name** are the primary name fields for a user; **Group Name** is the primary name for a group) as well as one or more **Alternate Spoken Name** fields.

Use the primary name fields to enter the most common name of an entity. This name should be the one that most people use, **not** the “official” name. For example, if everyone calls the user “William Bones” by the name “Billy”, you should enter “Billy” in the **First Name** field and “Bones” in the **Last Name** field.

If people often refer to users by something other than their primary names, such as a nickname or a title, you must also provide an alternate spoken name. For example, if people often call the user “Jason Crunch” by the nickname “Captain”, you must enter “Captain Crunch” as his first alternate spoken name.

Similarly, if the user Rob Shostak is a doctor, enter his first and last names as usual, then enter “Doctor Shostak” as one alternate spoken name, and “Doctor Rob Shostak” as another alternate spoken name. This practice accommodates peers who call him “Rob Shostak”, as well as nurses who typically call him “Doctor Shostak” or “Doctor Rob Shostak”.

Because you cannot enter any letters except the 26 English letters in the Administration Console or User Console, you may sometimes have problems with user names. For example, you cannot enter common non-English characters such as ñ and é. If a user's name is “Louis Céline”, you need to enter an approximation such as “Celine” in the console. In addition, if he uses the French pronunciation, or if other users refer to him with this pronunciation, you may need to add an alternate spoken name such as “Saline”.

In general, however, do not provide alternate spoken names to accommodate a name that appears to have a “non-English” pronunciation, unless testing indicates that the system cannot recognize it. Vocera understands a wide variety of name pronunciations, and unnecessary alternate names increase the size of the database. An exception to this rule is slang or jargon that is often pronounced differently than it is spelled.

### Using Numeric Values in Names

Because Vocera supports numeric and mixed alphanumeric values in name fields, you can create address book entries such as “911” or group names such as “Room 299”.

Vocera supports the full range of common number pronunciations. For example, users can pronounce “Room 299” as either “Room Two Nine Nine”, “Room Two Ninety Nine”, or as “Room Two Hundred Ninety Nine” without creating alternate spoken names.

Previous versions of Vocera required you to spell any numbers that appeared in name fields. For example, you needed to enter names in the above example as “Nine One One” and “Room Two Nine Nine”. These phonetic spellings limit users to a single pronunciation unless you provide alternate spoken names, which can be time consuming to enter and maintain. If you are using spelled numbers in a name field, consider converting them to numeric values for ease of maintenance and improved speech recognition.

Vocera supports the number pronunciations that are appropriate for different locales. For example, if you are using the UK locale, users can pronounce “7007” as “Seven Double Oh Seven”, “Seven Double Naught Seven”, “Seven Oh Oh Seven”, and so forth.

### Genie Number Pronunciations

Although Vocera allows **users** to say a full range of number pronunciations, the **Genie** always chooses a single pronunciation when responding to users.

If you don't like the Genie's pronunciation, you can record a name for the Genie to use when interacting with users in a voice command.

For example, suppose you have a group whose name is "Room 427". The Genie always pronounces this group as "Room Four Hundred and Twenty Seven", but users may pronounce it as "Room Four Twenty Seven". To change the Genie's pronunciation, use the "Record a Name" command to specify the name as "Room Four Twenty Seven".

### Leading Zeros in Names

Because the Administration Console sorts names **alphabetically**, numeric values may sort differently than you expect.

For example, a group called **I C U Nurse Bed 10** sorts before a group called **I C U Nurse Bed 2**.

To take advantage of numeric values and also have names sort as users expect, add leading zeros to the numbers so they have the same number of digits. For example, a group called **I C U Nurse Bed 02** sorts before a group called **I C U Nurse Bed 10**.

Users do not have to pronounce these leading zeros to make a call; in fact, because leading zeros are ignored in common number pronunciations, users are not permitted to pronounce them. Consequently, a user sends a message to the **I C U Nurse Bed 02** group by saying "Send a message to Eye See You Nurse Bed Two".

### Using Ordinal Numbers in Names

An **ordinal** number specifies the position of an item in a sequence, such as "first", "second", or "third".

Although Vocera supports the full range of **number** pronunciations, it does not support common pronunciations of **alphanumeric ordinals** such as "1st", "2nd", or "3rd". For example, if you create groups whose names are "1st Floor" and "2nd Floor", Vocera expects you to pronounce them as "One-st Floor" and "Two-nd Floor".

Some organizations prefer to use alphanumeric ordinals in names because they sort in an expected order when you view them in the Administration Console. If you need to use alphanumeric ordinals, make sure you also create purely alphabetic alternate names to allow natural speech recognition. For example, if you are using "1st Floor" as a group name, create an alternate spoken name spelled as "First Floor" to support proper speech recognition.

### Using Abbreviations in Names

Because the values you enter in name fields determine both what a user can say in a voice command and also how the Genie will pronounce names to a user, be careful when you enter abbreviations.

Follow these rules to ensure that you enter abbreviations correctly:

- If you want the Genie to pronounce the individual letters in an abbreviation, spell it in capital letters, with a space between the letters, and without periods. For example, enter the abbreviation for the American Federation of State, County and Municipal Employees as "A F S C M E".  
If you use one of the supported healthcare acronyms (see [Healthcare Acronyms and Abbreviations](#) on page 35), you can omit the spaces between the letters.
- If you want the Genie to pronounce an entry as a word, spell it as a word—that is, spell it with conventional capitalization and without unnecessary spaces between the letters. For example, enter the name Bob Ray as "Bob Ray", not as "BOB RAY".

If you follow these rules, the Genie will always say what you intended. If you **do not** follow these rules, you may unintentionally create problems. The third-party software Vocera uses to provide text-to-speech translation may incorrectly interpret a string of capital letters as either an abbreviation or a word, depending on the number of letters in the string.

## Using Slang and Jargon in Names

Users often speak slang or jargon for group names and address book entries, and you should accommodate these existing speech patterns, rather than requiring users to learn other names.

Because slang and jargon often originate as either acronyms or the clipped form of words, they are often pronounced very differently than they are spelled, and you typically need to enter alternate spoken names to support them.

An **acronym** is an abbreviation that is pronounced as a word. For example, in a hospital, the Medical Intensive Care Unit is often abbreviated as "MICU" and pronounced as "Mick You". To accommodate this usage, Vocera supports several healthcare acronyms as part of the static grammar. See [Healthcare Acronyms and Abbreviations](#) on page 35.

Similarly, longer words such as "Pediatrics" are often spelled with the clipped form "Peds", but pronounced as "Peeds" (not "Peds", as the spelling implies). To accommodate this usage, enter "Pediatrics" in the **Group Name** field, and enter "Peeds" in the **Alternate Spoken Group Name** field.

The best practice in this situation is to enter the name as users spell it in the **Group Name** field and to enter phonetic variations in the **Alternate Spoken Group Name** field. This practice allows the expected and more readable name to appear in the user interface of the consoles, but still supports the spoken name preferred by users.

## Healthcare Acronyms and Abbreviations

The Vocera system supports the following standard acronyms and abbreviations for the healthcare industry as part of the static grammar.

You can embed these healthcare acronyms within group names. Spaces in an acronym are optional and can be omitted. For example, you can enter "MICU Charge Nurse" instead of "M I C U Charge Nurse". When one of these acronyms is used in a group name, users can pronounce either the letters in the acronym (for example, "M I C U") or the acronym itself (for example, "Mick You") to call the group.



**Note:** These acronyms and abbreviations should NOT be entered in the **Alternate Spoken Group Name** field. Otherwise, the alternate spoken group names could interfere with the recognition of the acronyms and abbreviations. Also, if you use acronyms or abbreviations in a group name, you should record the proper pronunciation of the group name. The Genie will then use your recorded prompt(s) for more natural sounding speech.

Table 7: Healthcare acronyms and abbreviations

Acronym/Abbreviation	Pronunciation
C C U	"C C U"
C M O	"C M O"
C N O	"C N O"
E D	"E D"
E K G	"E K G"
E N T	"E N T"
E R I	"E R I"
H U C	"H U C" or "HUCK"
I C U	"I C U"
I V	"I V"
L and D	"L and D"

Acronym/Abbreviation	Pronunciation
L V N	"L V N"
M I C U	"Mick You" or "M I C U"
M R I	"M R I"
M U C	"M U C"
N I C U	"Nick You" or "N I C U"
O B G Y N	"O B G Y N"
O R	"O R"
P A C U	"Pack You" or "P A C U"
P I C C	"PICK" or "P I C C"
P I C U	"Pick You" or "P I C U"
PRE OP	"PRE OP" or "Preop"
P T	"P T" or "Physical Therapy"
R A D O N C	"Rad Onk" or "R A D O N C"
R T	"R T"
S I C U	"Sick You" or "S I C U"

You can use Vocera Professional Services to customize the list of group name acronyms for your Vocera system. For more information, contact Vocera Professional Services.

## Working with Phone Numbers

You can enter phone numbers of various types in the User Console. For example, when you provide your basic information, you optionally specify your desk extension, cell phone number, and home phone number. Your Vocera administrator can also enter or update this information for you.

A User Console field for a phone number can contain any of the following characters:

- Digits. Any of the following characters: 0123456789
- Special dialing characters.

Vocera ignores any other character that you enter in these fields. For example, you can enter **(408) 790-4100** instead of **4087904100**. Vocera ignores the extra spaces, dashes, and parentheses when the number is actually dialed.

Entering a number in a console field does not guarantee that you will be able to call that number. You need permission from your Vocera administrator to make phone calls from your badge or to forward calls your badge receives to a telephone number. Your Vocera administrator sets all of the following permissions separately:

- Permission to call an internal number
- Permission to call a toll-free number
- Permission to call a toll number
- Permission to forward to an internal number
- Permission to forward to a toll-free number
- Permission to forward to a toll number

## Special Dialing Characters

A **special dialing character** is a non-numeric character that you can enter in a field in the Administration Console or the User Console that requires an access code, phone number, or extension.

For example, you can use an asterisk ( \* ) to simulate pressing the star key on a touch-tone phone, or enter an X at the beginning of a number to tell Vocera to treat that number as an extension.

Vocera supports the following special dialing characters:

Table 8: Special dialing characters

Character	Effect
,	<p>When connecting to an analog PBX, pauses for two seconds before dialing the next digit. Use a comma to force Vocera to pause briefly during a dialing sequence. Use multiple commas if you need to pause for more than two seconds.</p> <p>For example, suppose your system requires you to dial 9 as the local access code, but it is slow to establish an outside line. If you enter 9, in the Default Local Access Code field, Vocera dials a 9 and then pauses to let the system establish the outside line before continuing with anything following in the dialing sequence.</p> <p>Do not use a comma when you are connecting to a digital PBX. The comma character is not recognized by a digital PBX, and it may prevent a connection. However, you can use commas in sequences issued after a connection is made. For example, you can use commas to the right of a semicolon.</p>
;	<p>Separates the data Vocera uses to connect a call from any data Vocera passes through after the call is established. Characters to the left of the semicolon are used to establish the connection, and characters to the right of the semicolon are passed through after the connection is made.</p> <p>For example, you may need to use a sequence of characters such as the following to forward calls to a pager:</p> <p>Q 9, 1 (408) 555-1313 ; %V %D #</p> <p>In this sequence, Q 9, 1 (408) 555-1313 establishes the connection; the Q tells Vocera not to prepend an access code or area code, the 9 gets an outside line, and the remaining characters indicate the phone number to call. The %V %D # characters are pass-through values (the %V and %D are dialing macros, and the # is required by the pager to end the sequence).</p> <p><b>Important:</b> For any dialing string that includes a semicolon (;), the Vocera Telephony Gateway server automatically appends a # to end the sequence.</p>
&	Simulates pressing the flash key on a touch-tone telephone.
#	Simulates pressing the pound key (also called the hash key) on a touch-tone telephone.
*	Simulates pressing the star key on a touch-tone telephone.
X	<p>Tells Vocera to treat the sequence of digits following this special dialing character as an extension, without prepending either an access code or an area code to them. Vocera ignores this character unless it is the first character of the number. This special dialing character is not case-sensitive.</p>
Q	<p>Tells Vocera to dial the sequence of digits following this special dialing character as a literal value, without prepending either an access code or an area code to them. Vocera ignores this character unless it is the first character of the number. This special dialing character is not case-sensitive.</p>

## Phone Number Rules

The following rules define how Vocera interprets a value in a phone number, pager number, or extension field in the Administration Console or the User Console.

These requirements include:

- A value that starts with the letter X (for example, X1234) represents an **internal number** (for example, a desk extension or an inside pager number).
- A value that starts with the letter Q (for example, Q901114087904100) represents a number to be interpreted **literally**. Vocera dials such numbers as-is, without adding any access codes or area codes.
- Vocera also interprets a value with 6 or fewer digits as an **internal number**. However, for clarity, it's best to type the letter X before such values to make the meaning explicit. On a Vocera system configured for the UK locale, you must type the letter Q before an outside number of 6 or fewer digits (for example, Q9100 specifies an access code and a short code service number) to make Vocera dial the number as-is.
- A value longer than the maximum length for the locale is also interpreted **literally**. The following table lists the maximum phone number length, including area code, for each supported locale.

Table 9: Maximum phone number length per locale

AU	CA	GB	NZ	US
10 digits	10 digits	11 digits	11 digits	10 digits

- Some locales define a fixed length for telephone numbers. When a phone number field value is of this length, it represents a **local outside number**. For example, a Vocera system configured for the US locale interprets a 7-digit value as an outside number within the local area code. The following table lists the fixed length of local numbers, **not** including area code, defined for each supported locale.

Table 10: Fixed length of local numbers per locale

AU	CA	GB	NZ	US
Not defined	7 digits	Not defined	7 digits	7 digits

- In any other case, the value represents an outside number. Vocera adds access codes and applies **long distance** and **toll call** rules as appropriate. For clarity, it's best to include the area code with any outside number, local as well as long distance.

Vocera uses the same rules to interpret phone numbers spoken through voice commands, with the following additional limitations:

- You cannot use special dialing characters in a voice command.
- You cannot specify an extension of seven or more digits in a voice command.
- You must include the area code when speaking an outside number.

## Pop-Up Dialog Box Reference

The Administration Console displays dialog boxes that prompt you for information.

This section explains how to use these pop-up dialog boxes.

### Select Group

The Select Group dialog box lets you choose from a list of groups that are already defined in the Vocera system.

To display this dialog box, click the **Select** button next to any field that requires you to enter a group name.

Follow these steps to use the Select Group dialog box:

1. Choose a group name from the list.
2. Click **Finish**.

The Select Group dialog box closes, and the name appears in the field next to the **Select** button.

*To search for a name in the list:*



1. Begin typing the name in the **Search** field. As you type, the Vocera Voice Server finds the closest match.
2. Click **Finish**.  
The Select Group dialog box closes, and the name appears in the field next to the **Select** button.

### Select User or Group

Use the Select User or Group dialog box to choose from a list of users and groups defined in the Vocera system.

To display this dialog box, click the **Select** button next to any field that requires you to enter the names of users or groups.

This dialog box displays icons to help you identify the names:

- Users have badge icons next to their names.
- Groups have face icons next to their names.

#### To select a user, group, or address book entry:

1. Click a name.
2. Click **Finish** to close the dialog box.  
The name appears in the field next to the **Select** button.

#### To select multiple names:

1. Hold down the **Ctrl** key as you click each name.
2. Click **Finish** to close the dialog box.  
The names appear in the field next to the **Select** button.

#### To select a range of names:

1. Click the first name in the range.
2. Hold down the Shift key as you click the last name in the range.
3. Click **Finish** to close the dialog box.  
The names appear in the field next to the **Select** button.

#### To search for a name in the list:

1. Begin typing the name in the **Search** field.
  - Type the name of a group, the name or a place that is an address book entry, the last name of a user, or the last name of a person who is an address book entry.
  - If the list contains many users with the same last name, type a comma and space after the last name and continue with the first name.  
As you type, the Vocera Voice Server finds the closest match.
2. Click **Finish** to close the dialog box.  
The name appears in the field next to the **Select** button.

### Select User, Group, or Address Book Entry

The Select User, Group, or Address Book Entry dialog box lets you choose from a list of users, groups, and address book entries that are already defined in the Vocera system.

You can display this dialog box by clicking the **Select** button next to any field that requires you to enter the names of one or more users, groups, or address book entries.

This dialog box displays icons to help you identify the names:

- Users have badge icons next to their names.

- Groups have face icons next to their names.
- Address book entries have face icons with address books next to their names.

### To select a user, group, or address book entry:

1. Click a name.
2. Click **Finish** to close the dialog box.  
The name appears in the field next to the **Select** button.

### To select multiple names:

1. Hold down the **Ctrl** key as you click each name.
2. Click **Finish** to close the dialog box.  
The names appear in the field next to the **Select** button.

### To select a range of names:

1. Click the first name in the range.
2. Hold down the Shift key as you click the last name in the range.
3. Click **Finish** to close the dialog box.  
The names appear in the field next to the **Select** button.

### To search for a name in the list:

1. Begin typing the name in the **Search** field.
  - Type the name of a group, the name or a place that is an address book entry, the last name of a user, or the last name of a person who is an address book entry.
  - If the list contains many users with the same last name, type a comma and space after the last name and continue with the first name.  
As you type, the Vocera Voice Server finds the closest match.
2. Click **Finish** to close the dialog box.  
The name appears in the field next to the **Select** button.

## Select Site

The Select Site dialog box lets you choose from a list of sites that are already defined in the Vocera system. You can display this dialog box by clicking the **Select** button next to any field that requires you to enter a site name.



**Note:** This function can only be performed by a site administrator for a user.

### To use the Select Site dialog box:

1. Choose a site name from the list.
2. Click **Finish**.  
The dialog box closes, and the name appears in the field next to the **Select** button.

### To search for a name in the list:

1. Begin typing the name in the **Search for Site** field.  
As you type, the Vocera Voice Server finds the closest match.
2. Click **Finish**.  
The Select Site dialog box closes, and the name appears in the field next to the **Select** button.