



Call Center User's Guide

The Call Center is where a Call Center Supervisor manages their call queue(s), and where a Call Center Agent can view calls, and log-in/out of their assigned queue(s). There are an unlimited number of queues a single domain can have. [Supervisors](#) and [Agents](#) each have their own section in this document. The [Webphone for Call Center](#) section applies to both supervisors and agents.

Contents

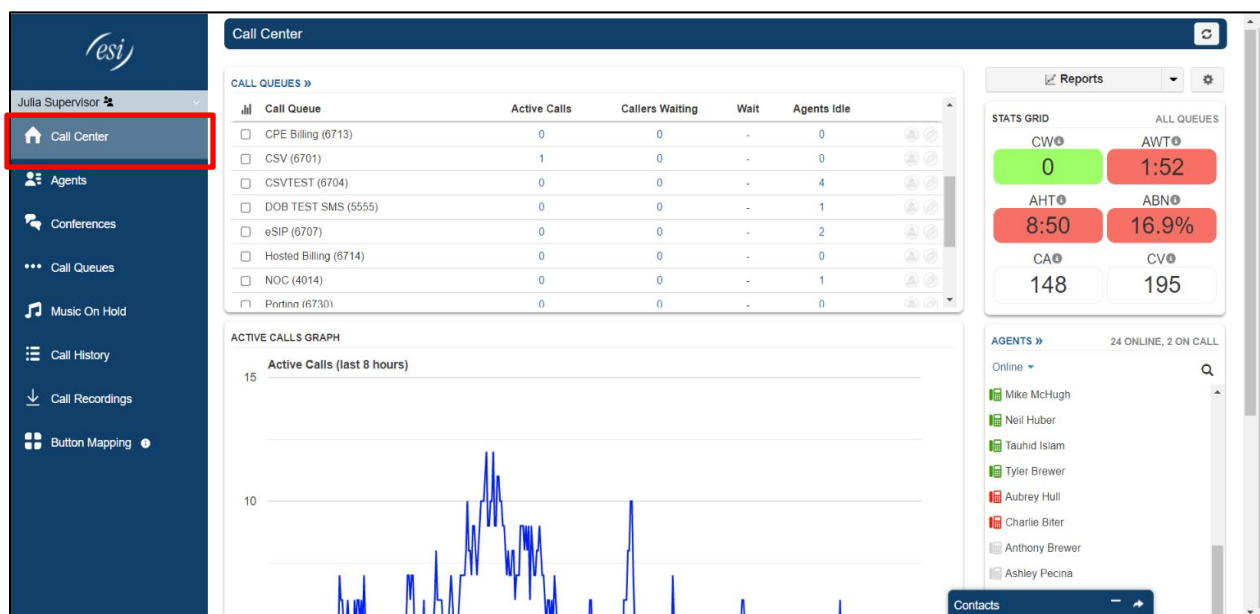
<i>Call Center Supervisor</i>	3
Dashboard Layout	3
Call Queues Table	3
Active Calls Graph.....	5
Stats Grid.....	6
Agents List	8
<i>Call Queue Management</i>	10
Call Queue Rules	10
Basic Queue Settings Tab.....	11
Pre Queue Options Tab.....	11
In Queue Options Tab.....	12
SMS Queue Options Tab	14
<i>Agent Management</i>	15
Agent Rules	15
Add an Agent	16
Edit an Agent	16
Remove an Agent	17
Manage Agents by User or Device	18
Enabling Agents to use SMS in a Queue.....	19
Hot-desking	20
<i>Call Center Reports</i>	22
Configure a Report	22
Sharing a Report.....	23
Types of Call Center Reports.....	25
<i>Call Center Analytics</i>	32
Accessing the Call Center Analytics.....	32

Managing your board	34
Adding and editing a board	34
<i>Music-On-Hold (MOH) for Queues.....</i>	39
Adding an Introduction Message.....	40
Adding a Comfort Message.....	41
<i>Call History.....</i>	44
<i>Call History Filters.....</i>	<i>44</i>
Calls Displayed.....	45
<i>Exporting Call History</i>	<i>45</i>
Cradle to Grave.....	45
Call Transcription and Sentiment Analysis.....	47
<i>Call Center Agent.....</i>	49
Dashboard Layout	49
My Queues table	49
My Graphs table.....	52
Online/Login button	54
ESI Call Center Analytics button	54
My Statistics table.....	54
Recent Call History table.....	55
<i>Webphone for Call Center Agents and Supervisors</i>	56
Call Parking in Webphone.....	57

Call Center Supervisor

Dashboard Layout

On the Call Center screen, the Supervisor can view a list of Call Queues, an Active Call Graph, a Stats Grid, a list of all agents in those queues and the agent's status.



Call Queues Table

In the upper center of the screen, the Call Queues table displays data in real-time - the number of active calls, the number of callers waiting, the current wait time, and the number of idle agents.

For each queue shown you can edit agents and the call queue setup from the buttons to the right of each row in the table. Refer to the [Agent Management](#) section for more information about editing agents.

CALL QUEUES »					
	Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle
<input type="checkbox"/>	Adds (6715)	0	0	-	3
<input type="checkbox"/>	Admin (6700)	0	0	-	2
<input type="checkbox"/>	Cloud III (6712)	0	0	-	3

Refer to the [Call Queue Management](#) section for more information about editing a call queue.

CALL QUEUES »					
	Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle
<input type="checkbox"/>	Adds (6715)	0	0	-	3
<input type="checkbox"/>	Admin (6700)	0	0	-	2
<input type="checkbox"/>	Cloud III (6712)	0	0	-	3



Call Queues Table Additional Data

The following columns provide additional data in the Call Queues table -

CALL QUEUES »					
	Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle
<input type="checkbox"/>	Cloud (6705)	0	0	-	1
<input type="checkbox"/>	Cloud Promo Q (6716)	0	0	-	0
<input type="checkbox"/>	Cloud Sales Specialist (6724)	0	0	-	0
<input type="checkbox"/>	CPE (6702)	0	0	-	1
<input type="checkbox"/>	CPE Billing (6713)	0	0	-	0
<input type="checkbox"/>	CSV (6701)	1	0	-	0
<input type="checkbox"/>	CSVTEST (6704)	0	0	-	4
<input type="checkbox"/>	DOB TEST SMS (5555)	0	0	-	1

The numbers shown under the columns are blue, which means they are clickable. Clicking on the number, even when it's zero, will present a popup, which provides the following information.

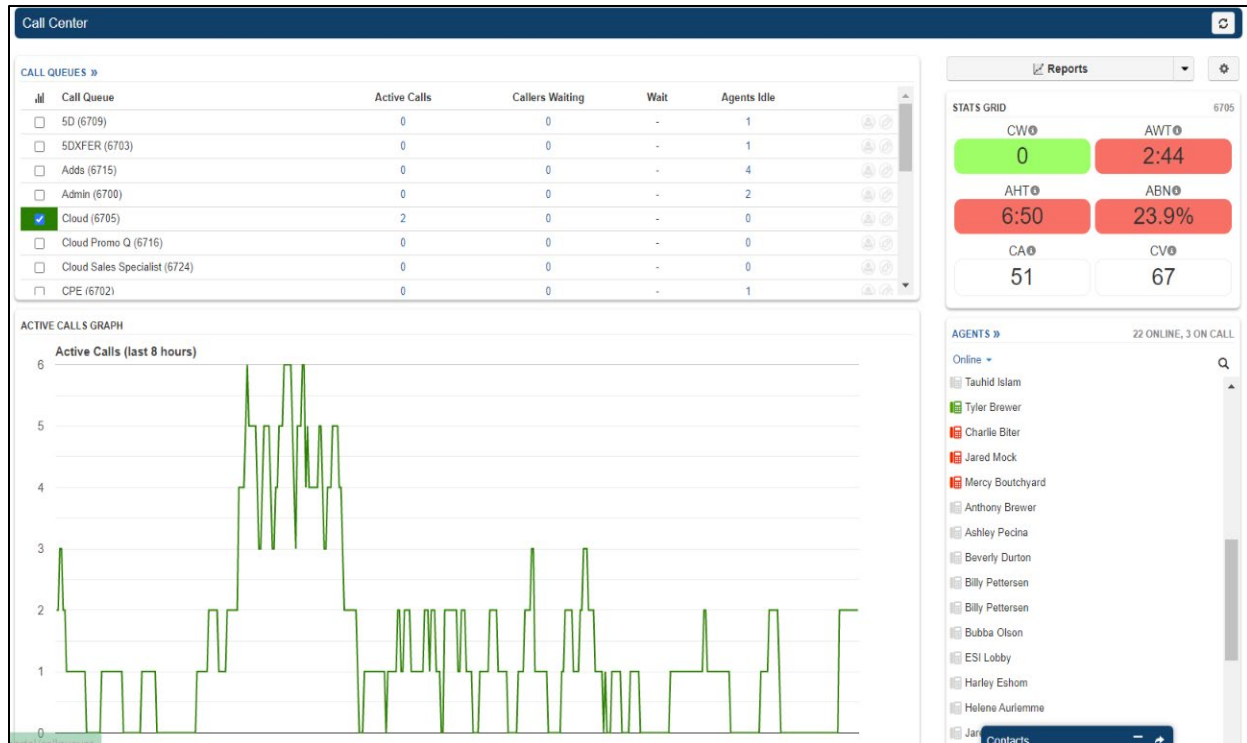
- Active Calls – displays the call information in real-time - the number the call originated from, the number that was dialed to enter the queue, the status of the call, the assigned agent, and the current duration of the call since it entered the queue.
 - The status must be "talking" in order for the "listen" feature to work, and the agent's scope in the call must be lower than the user who is attempting to listen in. Similar information appears when clicking the number of Callers Waiting.

Calls active in 6705 Call Queue						
From		Dialed	Status	Agent	Duration	
(832) 379-████	Check Out █████	(800) 850-2151	Talking	2301	11:48	
1 (858) 342-████	██████████ G ERI	1 (972) 422-9800	Talking	2401	11:35	

- Callers Waiting – displays the caller ID the call is originating from, the name of the caller (if available), the status of the call (such as "talking", "ringing agent"), and the current duration/time the caller has been on hold.
- Agents Idle – displays all of the agents in the queue. It includes the agent's extension, their current status, their answering order in the queue (if configured), the max number of calls they can receive at a time (no more than 6), and the max number of SMS messages they can receive at a time (no more than 5).

Active Calls Graph

The Active Calls graph represents the real-time data in the selected call queues. If none of the call queues are checked in the Call Queues table (above the graph), then the default selection is all call queues. The y-axis depicts the number of active calls in the last eight hours. Click on a specific queue to view only its stats.



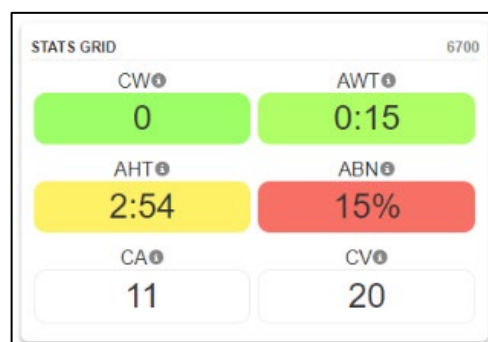
Stats Grid

The Stats Grid displays values based on color-coded thresholds in order to quickly identify when a configurable call queue limit has been reached or exceeded.

For instance, a Call Center Supervisor can set an AWT (Average Wait Time) of 120 seconds as a lower threshold. Then, if the average caller wait time is less than 120 seconds, the AWT stat will be green. If the wait time exceeds 120 seconds, the stat will change to yellow. The Call Center Supervisor would also set an upper threshold where the yellow (warning) would then change to red, such as at 3+ minutes (180 seconds). The upper threshold should typically always be higher than the lower threshold.

- Green - the value is below the lower threshold.
- Yellow - the value is at or above the lower threshold and below the upper threshold.
- Red - the value is at or above the upper threshold.
- White - the threshold has not been configured, such as is the default for CA and CV.

While these are the main colors you will also see color shades – green-yellow, orange, red-orange. These simply indicate that the stat is getting closer to the threshold.

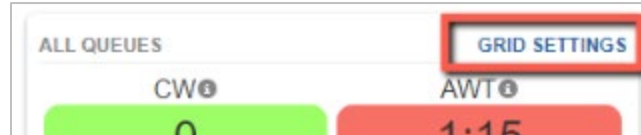


Stat	Full Name	Measure	Upper Threshold Default	Description
CW	Calls Waiting	Count	5	The active number of callers waiting in the selected call queue. If no queue is selected, all call queues are represented.
AWT	Average Wait Time	Seconds	60 secs.	The average time a caller spent in the call queue before being dispatched to an agent.
AHT	Average Handling Time	Seconds	240 secs.	This time includes Talk Time, Hold Time, and Disposition Time.
SL	Service Level	Percentage	None	This is the ratio of calls meeting the service level agreement that is configured under the stats grid settings >> general tab.
ABN	Abandon Rate	Percentage	15%	This is the percentage of calls abandoned, over the total calls offered.
CA	Calls Answered	Count	None	This is the number of calls answered by all agents in the call queue.
CV	Call Volume	Count	None	This is the number of calls originating in the call queue, including abandoned calls, answered calls, voicemails, and forwards.
AC	Abandoned Calls	Count	None	Calls that abandoned the queue before being dispatched to an agent.

Configuring the Stats Grid

To edit the thresholds

1. Click on the blue Stats Grid text in the upper corner of the Stats Grid view.
2. Make any necessary changes.
3. Click Save to save changes.
4. For the Service Level Agreement click on the Setting tab (gear icon) above the status grid.



If the Stats Grid thresholds are not configured, then the grid will default to the following behavior -

- Lower thresholds are 0 (blank) and will color-code as yellow when they reach 70% of the default upper threshold value.
- The CW (Callers Waiting) upper threshold is 5.
- The AWT (Average Wait Time) upper threshold is 60 (seconds).
- The AHT (Average Handling Time) upper threshold is 240 (seconds).
- The ABN (Abandon Rate) upper threshold is 15 (percent).
- CA (Calls Answered) and CV (Call Volume) do not have default upper thresholds and will color-code as white, no matter the number of calls answered or the call volume.

A screenshot of the 'Call Center Settings' dialog box, specifically the 'Stats Grid' tab. The dialog has a title bar 'Call Center Settings' and a close button. Below the title, there's a sub-header 'Stats Grid' and a descriptive text: 'Choose which stats to show in the stats grid and set the thresholds for when they change color. Leave blank for no color warnings. (reset to default)'. There are five sections, each with a toggle switch and two threshold input fields (Lower and Upper).

Stat	Toggle	Lower Threshold	Upper Threshold
Callers Waiting	on		5
Average Wait Time (sec)	on		60
Average Handling Time (sec)	on		240
Service Level(%)	OFF		
Abandon Rate(%)	on		15

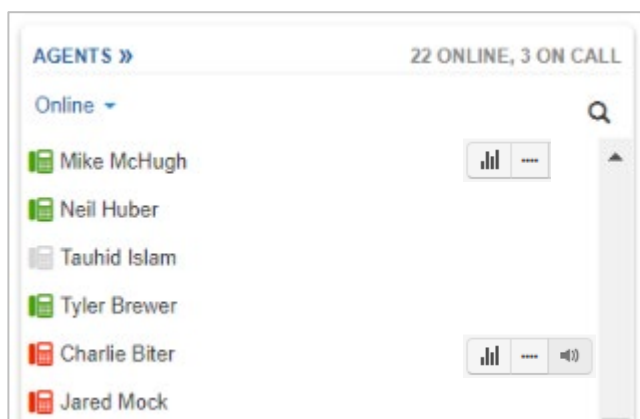
At the bottom, there are 'Close' and 'Save' buttons.A screenshot of the 'Call Center Settings' dialog box, specifically the 'General' tab. The dialog has a title bar 'Call Center Settings' and a sub-header 'General' which is highlighted with a red rectangle. Below the title, there's a descriptive text: 'Various settings for call center reporting and appearance.' There is a 'Service Level Agreement' slider with a value of 20, and a range from 20 to 1820.

Agents List

In the bottom right-hand corner of the Call Center dashboard is the Agents table. View an agent's call stats, assigned queues (including current status), and the option to listen. Agents in this table are color-coded as follows -

- Grey – offline, not registered device including Webphone and ePhoneGO2
- Green – Idle and available for new calls
- Red – busy, on a call.

Hover your cursor over an agent's name to see other options – agent stats, assigned queues, and listen/whisper/barge.



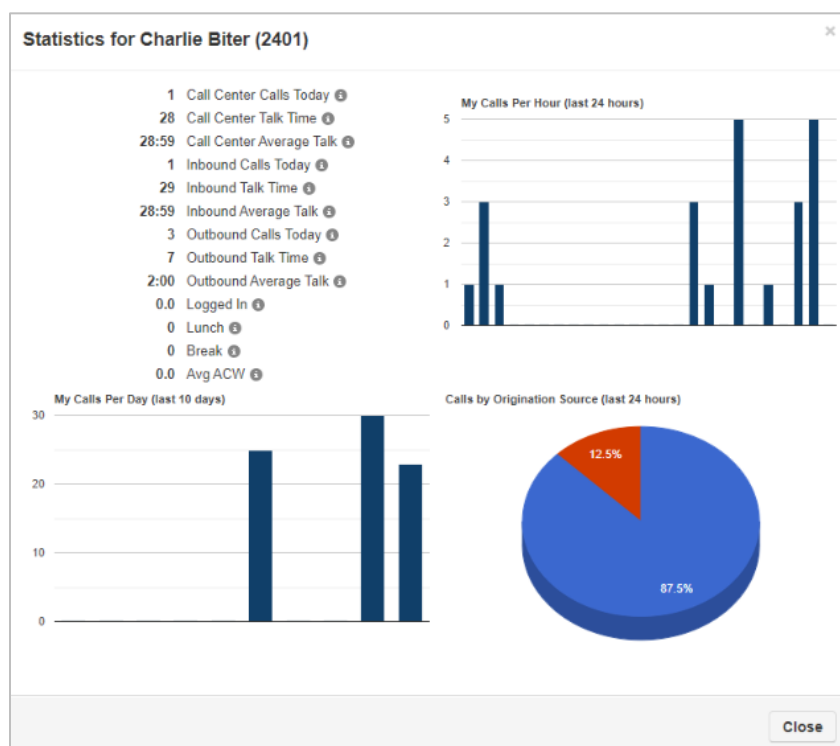
AGENTS » 22 ONLINE, 3 ON CALL

Online ▾

Mike McHugh	...
Neil Huber	
Tauhid Islam	
Tyler Brewer	
Charlie Biter	...
Jared Mock	...

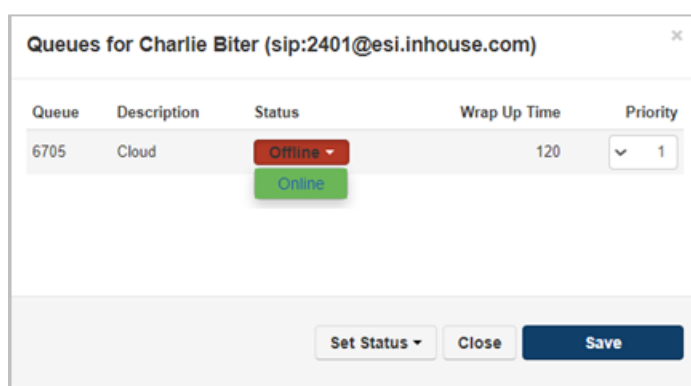
Agent Stats

Below is an example of an "agent stats" pop-up window. An agent's calls are graphed here for the past 10 days, and more specifically, the last 24 hours includes a break-down of call types, time talked, etc.



Assigned Queue(s)

The Assigned Queues pop-up window lists the call queues the agent is in. Status can be changed here (offline/logout or online/login) if the agent has forgotten to log-off for the day. Their queue priority can also be changed. The lowest number equals the highest priority (i.e. 1 is the highest priority and calls in that queue will be routed to the agent first).



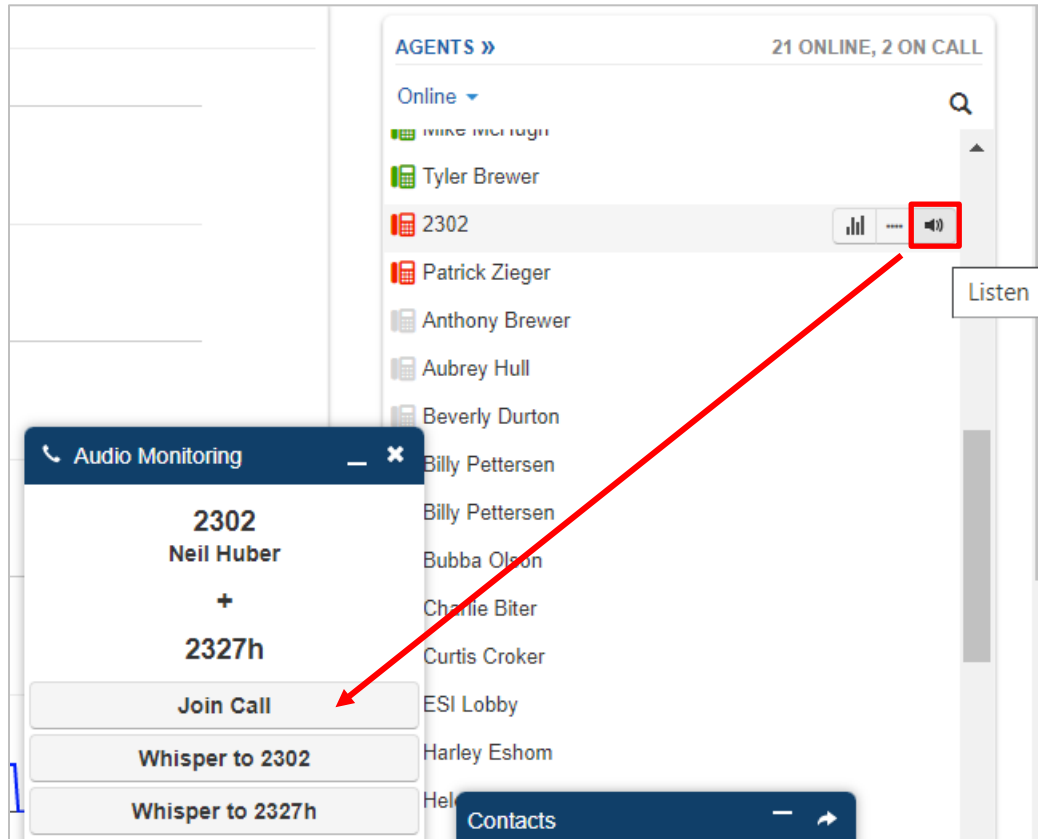
Queues for Charlie Biter (sip:2401@esi.inhouse.com)

Queue	Description	Status	Wrap Up Time	Priority
6705	Cloud	Offline Online	120	1

Set Status ▾ Close Save

Listen / Whisper / Barge

Listening to calls is an available feature for on-net and off-net calls when the status of a call is "talking". However, the scope of the user listening in must be higher than the scope of the agent in the call. For instance, a Call Center Supervisor will not have the option to listen in to a call where the agent is another Call Center Supervisor, but they can listen in to the calls of Call Center Agents.



- **Listen In** – the supervisor listens to the call. The agent or the caller are notified.
- **Whisper To** – the supervisor can talk to the agent and the customer is not aware. Whisper can be disruptive to the agent so ESI suggests using the Internal Chat feature instead.
- **Join Call** – the supervisor is added to the call creating a 3-way conference.

Call Queue Management

Supervisors can organize agents into groups (and optional tiers) to streamline the flow of incoming calls, adjust pre and post queue settings, music-on-hold and more.

Call Queue Rules

- Office Managers and Call Center Supervisors can add and configure call queues. Call Center Supervisors cannot add or delete a call queue, but they can change the type of queue assigned to a particular extension and pre queue / in queue / SMS options.
- A call queue must have a dedicated extension and owner. If the extension you are creating for the queue is not currently present then the system will create one and indicate this by showing the green new label to the right of the dialog box.
- If the call queue does not have a music on hold file, then the system will default to using the domain music on hold.
- Supervisors can also be restricted to specific queues.

You can manage / Edit your queues by clicking on the queue name itself when you're in the Call Queues panel of the eConsole.

Call Center	5DXFER	6703		Round-robin	0
Agents	Adds	6715	Customer Success	ESI Round-robin	0
Conferences	Admin	6700		Ring All	0
Call Queues	Cloud III	6712	Cloud	Round-robin	0
Music On Hold	Cloud Promo Q	6716		Ring All	0
	Cloud Sales Specialist	6724		Ring All	0
	CPE	6702	Legacy CPE	Round-robin	0
	CPE Billing	6713		Ring All	0

Or by clicking on the edit icon of for the queue if you're in the main panel of the eConsole.

Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle	
<input type="checkbox"/> Adds (6715)	0	0	-	3	Edit Queue
<input type="checkbox"/> Admin (6700)	0	0	-	1	
<input type="checkbox"/> Cloud III (6712)	0	0	-	2	
<input type="checkbox"/> CPE (6702)	0	0	-	1	
<input type="checkbox"/> CPE dispatch (6720)	0	0	-	2	
<input type="checkbox"/> CSV (6701)	0	0	-	3	

Either of the two options above will open up the Edit panel for the call queue. In this panel there are 4 available tabs in this panel - Basic, Pre Queue Options, In Queue Options, and SMS.

Add a Call Queue Round-robin

Basic

Pre Queue Options

In Queue Options

SMS

Basic Queue Settings Tab

The first tab sets the name and extension of a call queue (which is required). "Name" can later be changed, but the extension cannot.

- Name – Name of the queue, do not use spaces
- Extension – your choice but this cannot be changed once the queue is created
- Site – If applicable. Special characters are not supported
- Type – The type of queue you want to setup based on the hunting method -
 - Round-Robin (longest idle) - routes callers to the agent who has been idle longest.
 - Tiered Round-Robin - routes callers to tiers of agents, who are then rung one at a time before the caller moves to the next tier, until an agent answers.
 - Ring All - routes callers to all available agents at the same time.
 - Linear Hunt - routes callers to the available agents in a pre-defined order.
 - Linear Cascade - routes callers to groups of available agents in a pre- defined order.
 - Call Park - places the caller on hold until an agent retrieves the call. However call park is not specific to agents but all system users. Refer to the eConsole User's Guide (0455-0356-A) in [ESI's Resource Library](#).
- Record calls – There are 4 options -
 - **Yes** - have all calls from the queue recorded. These recordings are available to the Supervisor and Office Manager users.
 - **Yes w/ transcription** – have all calls for this queue, recorded and transcribed.
 - **Yes w/ transcription and sentiment analysis** – have all calls for this queue recorded, transcribed and have sentiment analysis done on the transcription.
 - **No** – have no calls recorded for this queue.
- Statistics – choose 'yes' if you want to use reports
- Message to agent –this option plays a message to the agent when they answer the call. For example "Remind the caller of our new warranty program.", "Remember to verify the customer's contact information."

The screenshot shows the 'Add a Call Queue' dialog box with the 'Round-robin' tab selected. The 'Basic' sub-tab is active. Fields include 'Name' (text input), 'Extension' (text input with a red '...' button and a note 'Note: Extension cannot be changed'), 'Department' (text input), and 'Site' (text input). The 'Type' section has radio buttons for 'Round-robin (longest idle)' (selected), 'Tiered Round-robin', 'Ring All', 'Linear Hunt', 'Linear Cascade', and 'Call Park'. Below these are dropdowns for 'Record Calls' (set to 'No') and 'Statistics' (set to 'Yes'). A 'Message to Agent' field is at the bottom with the text 'Configured after adding Call Queue.' and 'Cancel' and 'Next' buttons.

The screenshot shows the 'Record Calls' dropdown menu open. The options are: 'No' (selected), 'Yes', 'Yes w/ transcription', 'Yes w/ transcription and sentiment analysis', and 'No' (highlighted in blue at the bottom).

Pre Queue Options Tab

This screen has the same choices regardless of which call queue type is selected (except for Call Park, which does not have any additional tabs beyond Basic).

The screenshot shows the 'Edit test queue' dialog box with the 'Linear Hunt' tab selected. The 'Basic' section is active, showing options for before the caller is put in queue. The options are:

- Require agents: Yes (dropdown)
- Require intro MOH: No (dropdown)
- Max Expected Wait (sec): Unlimited (slider, range 500 to 1000)
- Max Queue Length: Unlimited (slider, range 50 to 99)
- Allow Callback option: Yes (dropdown)
- Forward if unavailable: Extension, number or phone (text input with a red '!!!' icon)

A note at the bottom states: 'Note:uses the default Time Frame.' At the bottom right are 'Cancel' and 'Save' buttons.

- Required Agents – set to at 'yes' if at least one agent must be available before a caller is sent to the queue. If set to 'yes' and no agents are logged in, callers will follow the call forwarding rule set for the queue.
- Require intro MOH – play the MOH in full before sending callers to agents. If set to 'no' and no others are in queue the caller will be sent directly to agent without MOH. This may not be desired if the MOH includes a greeting announcement to callers.
- Max expected wait (sec) – when the queue's average wait time reaches this max threshold the queue will not be open to new callers. New callers will follow the call forwarding rule set for the queue until the wait time drops below the threshold.
- Max queue length – when the queue reaches this max threshold new callers will not be allowed. New callers will follow the call forwarding rule set for the queue until the queue length drops below the threshold.
- Allow callback option – this allows the caller to receive a call back when an agent becomes available instead of waiting in queue.
- Forward if unavailable – In the Pre Queue Options tab, if "Require Agents" is set to Yes, and no agents are logged in, the "Forward if Unanswered" value from the In Queue Options tab will be used for incoming calls, instead of the "Forward if Unavailable" value at the bottom of this tab.

In Queue Options Tab

This tab configures what happens to callers while they are in the queue waiting to be directed to an agent. These are the in queue options available for the following call queue types - Round-robin, Tiered Round-robin, and Linear Hunt.

The screenshot shows a dialog box titled "Edit test queue" with a sub-header "Linear Hunt". It has four tabs: "Basic", "Pre Queue Options", "In Queue Options" (which is selected), and "SMS". Below the tabs, a subtitle reads "Options for while callers are queued and being routed to agents." The settings include:

- Queue Ring Timeout (sec):** A slider ranging from 5 to Unlimited, currently set at 5.
- Agent Ring Timeout (sec):** A slider ranging from 5 to 90, currently set at 5.
- Logout agent on missed call:** A dropdown menu set to "No".
- Enable voicemail:** A dropdown menu set to "Yes".
- If unanswered:** A dropdown menu set to "Stay in queue".

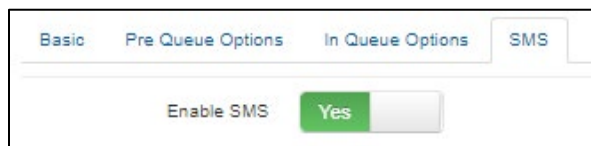
Below these settings, a note states: "Will prompt for callback or voicemail if enabled." At the bottom right, there are "Cancel" and "Save" buttons.

- Queue Ring Timeout (sec) – this is how long the queue should ring the available agent. This is the total time the caller is waiting for the queue to move through available agents.
- In platform version 42 (which is what is being used as of April 2022), Queue Ring Timeout when set to Unlimited in any queue type will mirror the MaxTalkDuration value, which defaults at 7200s. The timeout varies in previous versions - v39 is 60s and v40/v41 is 120s.
- Callers will be sent to the queue's voicemail if agents fail to answer before the Ring Timeout and if Forward if unanswered is not set. This will also trigger the system message - "Please continue to hold or Press 2 to leave a voicemail" and then return the call back to the queue if nothing is pressed. The voicemail box for the option to Press 2 is the call queue owner's voicemail box.
- Agent Ring Timeout (sec) – this is how long the queue should ring to each agent. This time should be less than the total "queue ring timeout".
- Logout Agent on Missed Call – when set to 'yes' an agent will be logged out of the queue if a queued call is presented to them and they do not answer. The agent will need to log back in to the queue to receive calls.
- Enable voicemail – Set whether or not voicemail is enabled for this queue. May be forced to voicemail after timeout or offered to caller as optional.
- If unanswered – this is where callers are sent if not agents are reachable or the queue are met. This field can be set to a different extension different queue, off-net number, or voice mail. The voice mail is the mailbox of the actual queue. To see these voice mails login to eConsole as the queue user.

SMS Queue Options Tab

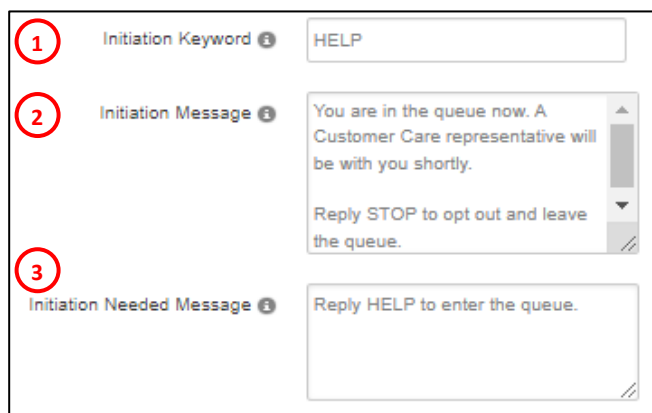
Prerequisites - You need to have SMS enabled numbers in the inventory. You will need one SMS number for each queue. Please contact your Office Manager and ask him to enable SMS service for the queues you need to be able to have that type of communication.

Slide the Enable SMS switch to the YES position.



The screenshot shows the 'SMS' tab selected in the top navigation bar. Below the tabs, there is a section labeled 'Enable SMS' with a green 'Yes' button and a grey 'No' button. The 'Yes' button is highlighted, indicating it is the selected option.

1. Set the “Initiation Keyword”. This is the keyword you want customers to send to this number in order to start a session with an agent.
2. Set the “Initiation Message”. This is the message the customer will receive in response to the initiation keyword indicating he/she has entered the queue. Make sure to include an opt-out word which is the keyword the customer can send to get out of the queue or close the session with the agent.

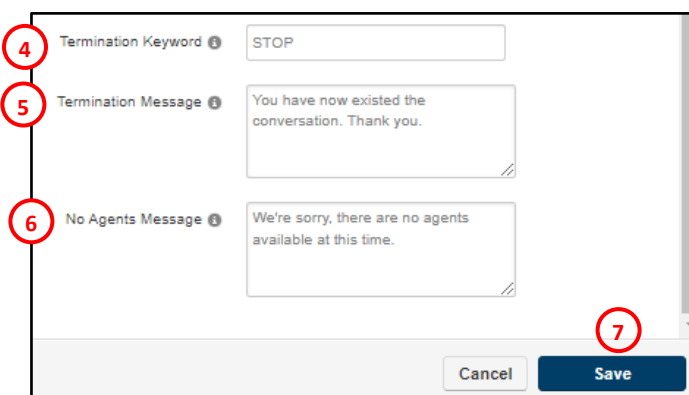


The screenshot shows the 'Initiation Keyword' field set to 'HELP'. The 'Initiation Message' field contains the text: 'You are in the queue now. A Customer Care representative will be with you shortly. Reply STOP to opt out and leave the queue.' The 'Initiation Needed Message' field contains the text: 'Reply HELP to enter the queue.'

3. Set the “Initiation Needed Message”. This is the message the customer will get in return if he/she send any text other than the Initiation Keyword.

Scroll down on the same panel and.

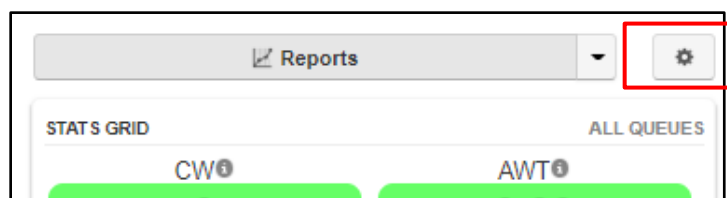
4. Set the “Termination keyword”. This is the keyword you stated in the Initiation Message to be used to opt-out of the session and get out of the queue.
5. Set the “Termination Message” This is the message the customer will get acknowledging the termination of an ongoing session or getting out of the queue before an agent was able to take the SMS session.
6. Set the “No Agents Message”. This is the message the customer will receive when he/she tries to enter the queue with the initiation keyword but there are no agents available to take the SMS session.
7. SAVE your settings



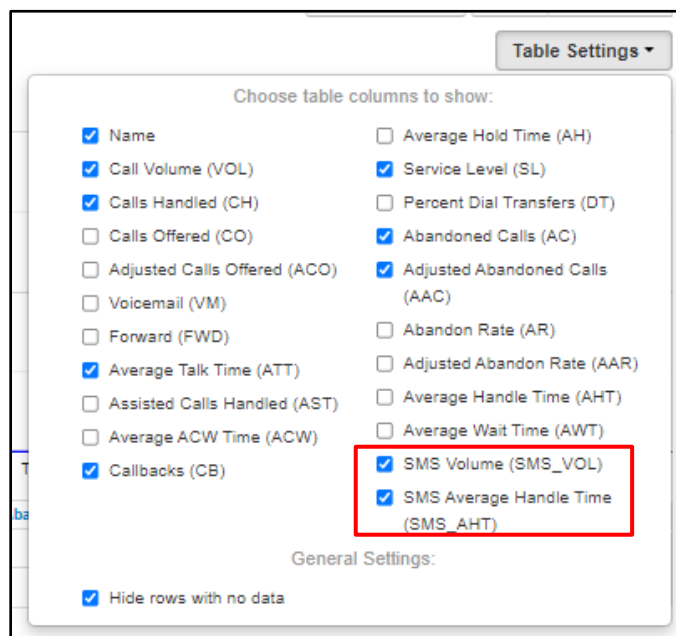
The screenshot shows the 'Termination Keyword' field set to 'STOP'. The 'Termination Message' field contains the text: 'You have now existed the conversation. Thank you.' The 'No Agents Message' field contains the text: 'We're sorry, there are no agents available at this time.' At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red circle.

The queue is now properly set for SMS communications.

Several new call queue statistics are available to call center supervisors. SMS Volume (SMS_VOL) is the number of SMS sessions that were handled for a queue. SMS Average Handle Time (SMS_AHT) is the average time it takes for an agent to handle an SMS session; from the time of accepting the session till ending it. These new statistics can be included in Reports for queues in the Call Center. Press on the Reports button in the Call Center panel.



Then checkmark the two SMS statistics from the list and go back to the report.



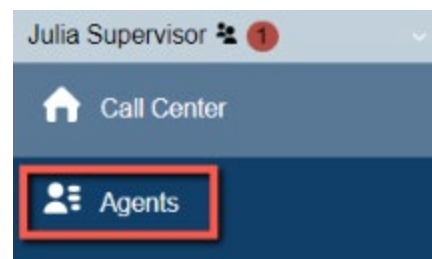
The statistics will now appear on the Queue Stats report.

0 Yesterday, 12:00 am Yesterday, 10:00 am Yesterday, 8:00 pm Today, 6:00 am Today, 4:00 pm									
Queue	Name	Call Volume	Calls Handled	Avg. Talk Time	CB	Service Level	Abandoned Calls	Adjusted Abandoned Calls	SMS Volume
5003	Administration	3	2	01:27	0	66.7%	1	0	1
									SMS Avg. Handle Time
									02:49:00

Agent Management

Agent Rules

- A call queue must be configured first before assigning an agent and the agent must be "online" in order to be part of an active queue.
- Call queues can contain both on-net and off-net agents.
- If a device is not registered, then the agent is considered "offline".
- Agents who are assigned to multiple queues can prioritize one queue over another.



Add an Agent

In the "Edit Agents" pop-up window, clicking Add Agent opens similar options as above, with the addition of the agent selection fields -

	Billy Pettersen	2316	No	120	1		
	Patrick Zieger	2327h	No	120	1		
	Curtis Croker	2344	No	120	1		
	Tauhid Islam	2354	No	120	1		

Add Agent Done

Edit an Agent

The Call Queues table in the Call Center conveniently allows the editing, adding, and removing of agents directly from this screen. Click on the icon of a person ("edit agents") in a call queue row.

CALL QUEUES »					
Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle	
<input type="checkbox"/> Cloud (6705)	0	0	-	1	<div style="border: 1px solid red; padding: 5px; display: inline-block;"> Edit Agents </div>

In the pop-up window that appears you can edit an individual agent by clicking Edit next to the desired agent name.

Agent Phone

2344 (Curtis Croker)

Status

Offline

Note: Changing Status may take a moment to update

Wrap up time (sec)

0

300

595

Max Simultaneous Calls

1

6

Queue priority for agent

1

☐ Request Confirmation

Cancel

Save Agent

Agent	Phone/User	Auto Answer	Wrap-up Time	Max Calls
Lee Jackson	2172	No	120	1
Reed Burton	2301	No	120	1
Billy Pettersen	2316	No	120	1
Patrick Zieger	2327h	No	120	1
Curtis Croker	2344	No	120	1
Tauhid Islam	2354	No	120	1

Add Agent

Done

You can edit

- Status (offline or online) wrap up time in seconds
- The maximum number of simultaneous calls (no more than 6)
- The maximum number of SMS messages (no more than 5) the agent's queue priority (1-99)
- The agent's order in a linear hunt, if applicable (1-99) request confirmation from the agent when the call is answered (recommended for off-net agents)
- Select whether the call should be automatically answered for the agent.

Remove an Agent

In the "Edit Agents" pop-up window, click the X across from an agent to immediately remove them from the queue.

Agent

Phone/User

Auto Answer

Wrap-up Time

Max Calls

Lee Jackson

2172

No

120

1

Reed Burton

2301

No

120

1

Billy Pettersen

2316

No

120

1

Patrick Zieger

2327h

No

120

1

Curtis Croker

2344

No

120

1

Tauhid Islam

2354

No

120

1

Charlie Biter

2401

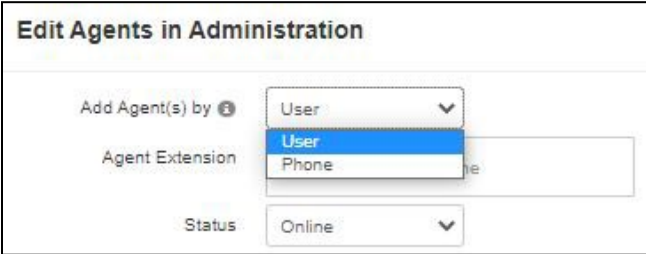
No

120

1

Manage Agents by User or Device

Up until now, only devices could be added to queues when adding agents, which can lead to cluttering up the UI with multiple entries for the same user. If a user is logged into three devices, these will all appear in the queue, throwing off the count of who is present in the queue.



The screenshot shows the 'Edit Agents in Administration' form. The 'Add Agent(s) by' dropdown is set to 'User'. The 'Agent Extension' field is empty. The 'Status' dropdown is set to 'Online'.

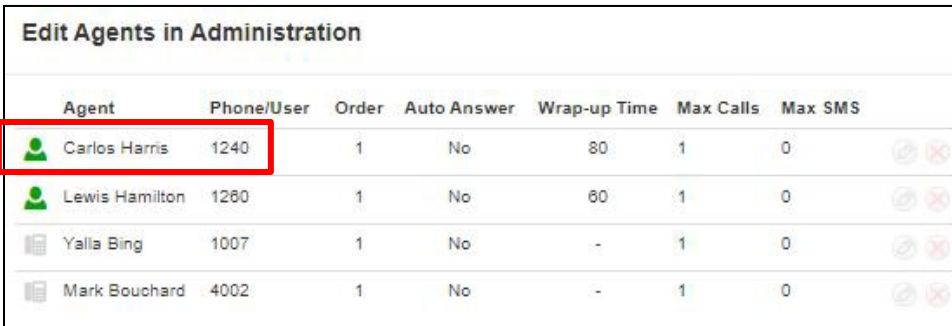
The procedures for adding agents to a queue have been enhanced to add agents either by User or by Device.













When an agent is added on a per-User basis, you will select the user or extension number of the agent to be added to the queue.



The screenshot shows the 'Edit Agents in Administration' form. The 'Add Agent(s) by' dropdown is set to 'User'. The 'Agent Extension' field is populated with '1240 (Carlos Harris)'. The 'Status' dropdown is set to 'Online'. A note at the bottom states: 'Note: Changing Status may take a moment to update'.

An agent added in this manner, will appear in the Agents list for the queue with a “person” icon rather than with a device icon. The answering rules that particular agent has defined will be honored on incoming calls.



Edit Agents in Administration							
Agent	Phone/User	Order	Auto Answer	Wrap-up Time	Max Calls	Max SMS	
 Carlos Harris	1240	1	No	80	1	0	 
 Lewis Hamilton	1260	1	No	60	1	0	 
 Yulia Bing	1007	1	No	-	1	0	 
 Mark Bouchard	4002	1	No	-	1	0	 

When an agent is added on a per-Device basis, you will select the user’s device that should ring when on incoming calls.



The screenshot shows the 'Edit Agents in Administration' form. The 'Add Agent(s) by' dropdown is set to 'Phone'. The 'Agent Phone' field is populated with '1240wp (Carlos Harris)'. The 'Status' dropdown is set to 'Online'.

An agent added in this manner, will appear in the Agents list for the queue with a “device” icon rather than with a person icon.

Agent	Phone/User	Order	Auto Answer	Wrap-up Time	Max Calls	Max SMS	
Lewis Hamilton	1260	1	No	60	1	0	
Yalla Bing	1007	1	No	-	1	0	
Carlos Harris	1240wp	1	No	60	1	0	
Mark Bouchard	4002	1	No	-	1	0	

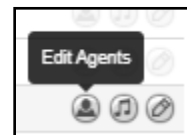
Existing agents added to a queue by device can be easily converted to Users using the Control at the bottom right of the Edit Agents panel for the queue.

Convert all agents to user?

Convert Agents Add Agent Done

Enabling Agents to use SMS in a Queue

You can now select which agent in the Queue will be able to handle SMS communications. Navigate back to the Call Queue option in the main menu. For the queue you want to manage, click on the “Edit Agents” icon.



Slide the control bar labeled “Max SMS Sessions” to the desired number of maximum simultaneous SMS sessions you want this agent to handle. Leaving the bar in the “zero” position, means this agent will not handle SMS communications with customers.

Repeat the step above for as many agents as needed.

The queue and its agents are not ready to start receiving SMS communications requests from customers.

Agent Phone 1240wp (Carlos Harris)

Status Offline

Note: Changing Status may take a moment to update

Wrap up time (sec) 0 300 595

Max Simultaneous Calls 0 5

Max SMS Sessions 0 5

Queue priority for agent 1

Hot-desking

Hot-desking is a feature which allows for multiple office workers on different shifts to use a single physical workstation or surface as opposed to each staff member having their own personal desk.

Rules

- In order to receive calls at the shared workspace, the user must activate the device. In so doing, the device is then associated with them.
- Activating a device will release the previous user if they had not previously released themselves.
- Once the device is activated their calls are automatically routed to the device and call statistics follow them as well.
- Devices that are to be used for hot-desking should not be created to belong to a specific user.

Prerequisites

The customer has to provide the following information to the implementation team -

- The extension numbers that are intended to use for hot-desking.
- The MAC address of the phones that are intended to use for hot-desking.
- The model name of the phones intended to use for hot-desking.

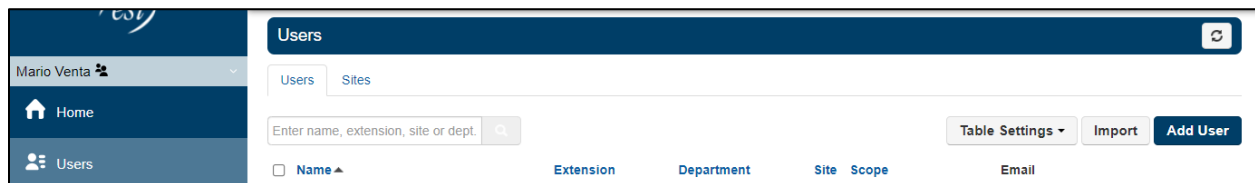
This information is used by the implementation team to properly setup the hot-desking feature.

The information above is used by the implementation team to properly set a desk phone for hot-desking use.

Only the Office Manager can add users to a hot-desking device as described in the following procedure.

Adding Hot-desking Users (Office Managers)

1. In the eConsole, navigate to the Users tab.
2. Click on Add User and create a user that will be using the hot-desking feature.

The screenshot shows the 'Users' tab in the eConsole. On the left is a sidebar with a user profile for 'Mario Venta' and navigation links for 'Home' and 'Users'. The main content area has a header 'Users' with a refresh icon. Below the header are tabs for 'Users' and 'Sites'. A search bar is present with the placeholder text 'Enter name, extension, site or dept.'. To the right of the search bar are buttons for 'Table Settings', 'Import', and 'Add User'. Below these elements is a table with columns: 'Name' (with a dropdown arrow), 'Extension', 'Department', 'Site', 'Scope', and 'Email'. The 'Add User' button is highlighted in blue.

3. In the first and last name, enter an easy way for you to determine that this is a hot-desking user
4. Assign an extension number
5. Assign the user to a User's Scope of Call Center Agent.
6. Make sure that the button next to Add Phone Extension is not checked.
7. Click **Add User** to complete.

Add a User

3

First Name

Hot Desking

4

Last Name

User 100

4

Extension

100

Note: Cannot be changed

Department

Email Address(es)

example@example.com

5

User's Scope

Call Center Agent

Caller ID

6

☒ Enable Voicemail

☐ Add Phone Extension

New Password

Note: Password must be numbers only

Confirm New Password

7

Cancel

Add User

Repeat the steps above for any additional hot-desking users you may need.

Call Center Reports

The dashboard provides custom call queue reports. These reports provide a graphical overview of call center statistics over a given period of time. They can cover the entire call center, queues, or individual agents. This granularity enables call center supervisors to monitor their call center.

There are 5 types of Call Center Reports - Queue Stats, Agent Stats, Agent Availability, Dialed Number Stats, & Abandoned. This article covers each of these reports in detail as well as the common features.

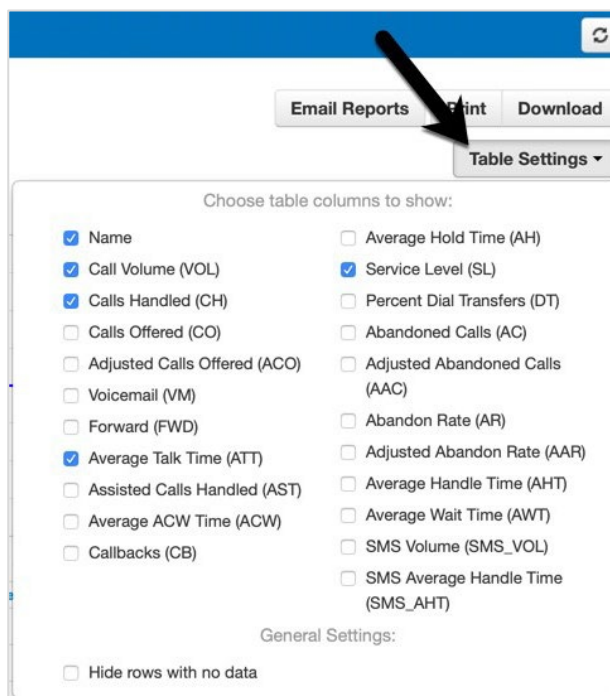


Configure a Report



By default the report screen shows the Queue report of the last day. Select the desired report and date range if applicable.

To the right of the screen is the Table Settings selection. The settings options vary based on the type of report selected. Whichever checkboxes are selected will appear in the table below the graph.



Sharing a Report



The screenshot shows the top of a web application with a dark blue header bar containing the text "/ Reports" and a refresh icon. Below the header, there is a "Type:" dropdown menu set to "Queue Stats". To the right of this, three buttons are visible: "Email Reports", "Print", and "Download". These three buttons are enclosed in a red rectangular box. Below the buttons, there is a date and time range selector showing "09/21/2022" to "09/22/2022" with a time range of "12:00" to "11:00". A "Table Settings" dropdown is located at the bottom right of the interface.

Print and Download

Print opens a print dialog box and will print the report that is currently on screen. Utilize the "print to PDF" feature available in most print dialogs to save the report as a file instead of printing to paper.

Download will immediately download the report that is displayed on the screen. The downloaded file will be named according to the type of report selected and the reporting time period. For example, a Queue Stats report download with no time selected and the dates from 3/31/2022 to 4/1/2022 would look like this - queueReport_03_31_2022_00_00_00- 04_01_2022_00_00_00.csv

Scheduled Email

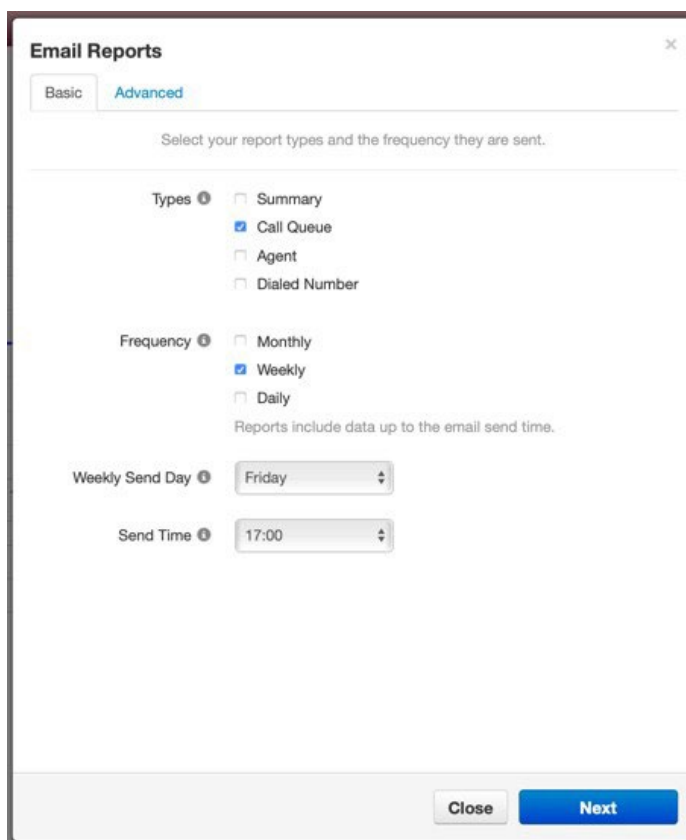
Email Reports opens a tool to send a particular type of report on a configured schedule. Select one or more. The types of reports are Summary (which is a summary of the following reports in this list), Call Queue, Agent, and Dialed Number. See below for more information about the advanced options and email report values.

By default, an emailed report is limited to no more than 4 columns, which is usually the best fit for an HTML email. This can be adjusted by ESI Support.

1. Email Reports opens a tool to send a particular type of report on a configured schedule. Select one or more. The types of reports are Summary (which is a summary of the following reports in this list), Call Queue, Agent, and Dialed Number.
2. An Advanced tab (see the full list of selections in the table below) will only display when one or more of these reports are selected. Select which stats to send in each of the selected reports.

Emails are sent to the user who is configuring the report. To send to additional people, add up to four Extra Email Addresses here in the advanced tab.

Select "attach csv data to email" when the reporting data needs to be analyzed in excel or a similar program.



The screenshot shows the "Email Reports" dialog box with the "Advanced" tab selected. The dialog has a title bar with "Email Reports" and a close button. Below the title bar, there are two tabs: "Basic" and "Advanced". The "Advanced" tab is active, showing a section titled "Select your report types and the frequency they are sent." Below this, there are two sections: "Types" and "Frequency". In the "Types" section, there are four checkboxes: "Summary" (unchecked), "Call Queue" (checked), "Agent" (unchecked), and "Dialed Number" (unchecked). In the "Frequency" section, there are three checkboxes: "Monthly" (unchecked), "Weekly" (checked), and "Daily" (unchecked). Below the frequency section, there is a note: "Reports include data up to the email send time." At the bottom of the dialog, there are two dropdown menus: "Weekly Send Day" set to "Friday" and "Send Time" set to "17:00". At the very bottom, there are two buttons: "Close" and "Next".

Frequency can be daily, weekly, and/or monthly. Selecting monthly will open the option for selecting which numerical day of the month. Weekly will open which day of the week. Daily will open which time.

Email Reports opens a tool to send a particular type of report on a configured schedule. Select one or more. The types of reports are Summary (which is a summary of the following reports in this list), Call Queue, Agent, and Dialed Number. See below for more information about the advanced options and email report values.

By default, an emailed report is limited to no more than 4 columns, which is usually the best fit for an HTML email. This can be adjusted by ESI Support.

For example, the Call Center Manager needs a report emailed to her assistant every week to monitor call flow. The manager would set up a "Call Queue" report and set the frequency to "weekly", every Friday at 17 - 00. In the advanced tab, she would select "Calls Handled", type in her assistant's email address, and check the box for a .csv file. Every Friday at 5PM, the manager and her assistant will receive an email with the number of calls handled that week along with the values in an attached file, starting from 5 - 01PM the Friday before.

Advanced Tab (continued) - Customizing the Report

The screenshot shows the 'Email Reports' dialog box with the 'Advanced' tab selected. The dialog has a title bar with a close button (X). Below the title bar are two tabs: 'Basic' and 'Advanced'. The 'Advanced' tab is active. The main content area is titled 'Customize your reports and add more recipients.' and contains the following elements:

- Statistics for Call Queues**: A section with an information icon (i) and a dropdown menu. The dropdown menu is open, showing the following options: 'Call Volume', 'Calls Handled' (selected), 'Calls Assisted', 'Calls Offered', 'Adjusted Calls Offered', and 'Voicemail'. Below the dropdown is a hint: 'Hold Ctrl/CMD or Shift to select multiple.'
- Extra Email Addresses**: A section with an information icon (i) and a text input field containing 'assistant@reality.com'. To the right of the input field is a green plus icon (+).
- Attach CSV data to Email**: A checkbox that is checked.

At the bottom of the dialog are three buttons: 'Close', 'Back', and 'Save'.

Here is the data that will export from each type of emailed report's advanced selection -

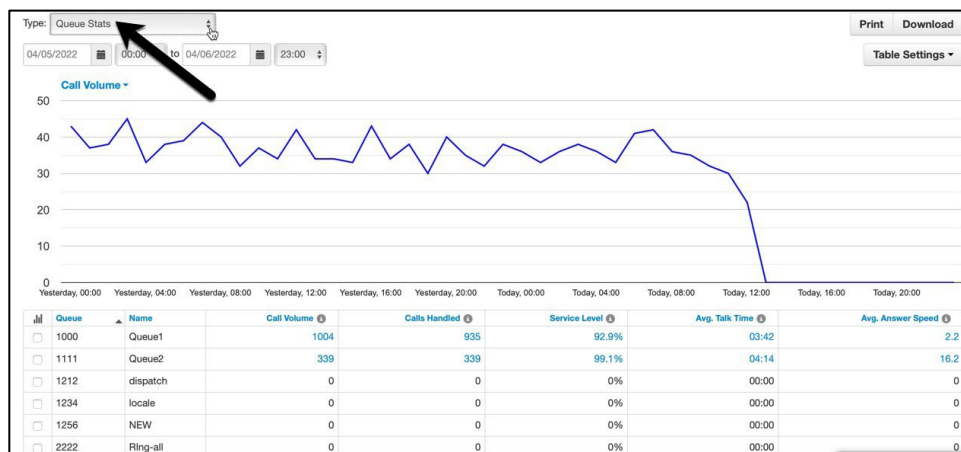
Stat	Definition
Call Volume	Number of calls originating through a Call Queue. Includes answered calls, abandoned calls, forwards, and voicemail.
Calls Handled	Number of calls answered by agent originating through a Call Queue.
Calls Assisted	Number of calls answered and then forwarded to another agent.
Calls Offered	Number of calls that reached the queue to be dispatched to agents. Includes abandoned calls. Excludes forwards and voicemail.
Adjusted Calls Offered	Adjusted number of calls that reached the queue. Excludes calls abandoned in less than 10 seconds. (Calls Offered CO) - (Adjusted Abandoned Calls AAC).
Voicemail	Number of calls handled by the automated voicemail system.
Time Talking	The number of minutes spent by an agent for all calls.
Average Talk Time	Average number of minutes spent by agent talking per call, on calls originating through a Call Queue. Excludes hold time.
Average Hold Time	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.

Types of Call Center Reports

This section provides a detailed look into the five types of Call Center Reports available in the portal - Queue Stats, Agent Stats, Agent Availability, Dialed Number Stats, and Abandoned.

Queue Stats

The Queue Stats report allows supervisors to view specific attributes on a queue-by-queue basis such as call volume, calls handled, abandoned calls, average wait time, and much more.



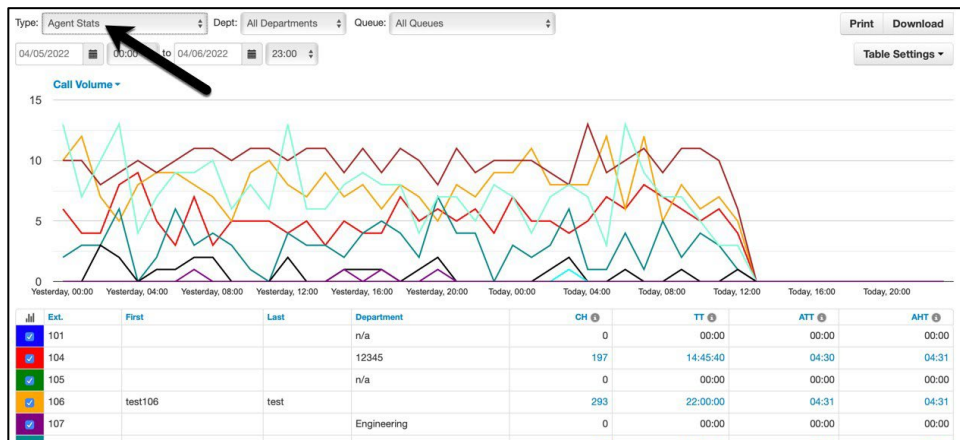
Here are the configurable attributes available within a Queue Stats report. Select or deselect them in Table Settings to show or hide. Optionally, select to "hide rows with no data".

Stats	Definition
Volume (VOL)	Number of calls originating through a Call Queue. Includes answered calls, abandoned calls, forwards, and voicemail.
Calls Handled (CH)	Number of calls answered by agent originating through a Call Queue.
Calls Offered (CO)	Number of calls that reached the queue to be dispatched to agents. Includes abandoned calls. Excludes forwards and voicemail.
Adjusted Calls Offered (ACO)	Adjusted number of calls that reached the queue. Excludes calls abandoned in less than 10 seconds. (Calls Offered CO) - (Adjusted Abandoned Calls AAC)
Voicemail (VM)	Number of calls handled by the automated voicemail system.
Forward (FWD)	Number of calls forwarded to another queue or off-net phone number for handling. Includes forwarded calls to voicemail.
Average Talk Time (ATT)	Average number of minutes spent by agent talking per call, on calls originating through a Call Queue. Excludes hold time.
Assisted Calls Handled (AST)	Number of calls answered and then forwarded to another agent.
Average ACW Time (ACW)	Average time an agent spends between the end of a call and submitting call disposition.
Callbacks (CB)	Number of calls that requested a callback rather than waiting in the queue.
Average Hold Time (AH)	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
Service Level (SL)	The ratio of calls meeting the configurable service level agreement.
Percent Dial Transfers (DT)	Percentage of calls that landed in the queue and were offered to an agent.
Abandoned Calls (AC)	Number of calls that abandoned the queue before being answered by an agent.
Adjusted Abandoned Calls (AAC)	Adjusted number of calls that abandoned the queue. Excludes calls abandoned in less than 10 seconds. (Abandoned Calls) - (Number of calls abandoned in less than 10 seconds)
Abandon Rate (AR)	Percentage of calls offered that were abandoned before being offered to an agent. (Abandoned Calls AC) / (Calls Offered CO)
Adjusted Abandon Rate (AAR)	Percentage of calls offered that were abandoned in under 10 seconds. (Adjusted Abandoned Calls AAC) / (Adjusted Calls Offered ACO)
Average Handle Time (AHT)	Average time an agent spent on a call. Includes Talk Time (TT), Hold Time (AH), and Disposition Time (ACW).
Average Wait Time (AWS)	Average number of seconds a caller spent in the selected queue before being dispatched to an agent. If none selected, total for all queues will be displayed.

SMS Volume (SMS_VOL)	Number of SMS sessions handled through a Call Queue. Available in Portal v40 and higher.
SMS Average Handle Time (SMS_AHT)	Average time an agent spent handling an SMS session from the queue, starting from the moment they accept the message until it is terminated. Available in Portal v40 and higher.

Agent Stats

The Agent Stats report displays color-coded statistics by agent such as extension, department, talk time, missed calls, and more.



Here are the configurable attributes available within an Agent Stats report. Select or deselect them in Table Settings to show or hide. Optionally, select to "hide rows with no data".

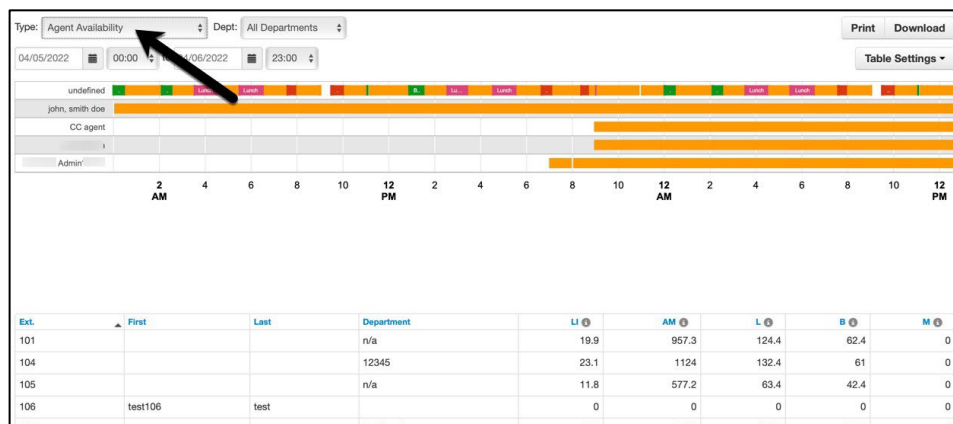
Stats	Definition
Calls Handled (CH)	The number of calls answered by the agent originating through a Call Queue.
Talk Time (TT)	The number of minutes spent by an agent on answered calls originating through a Call Queue.
Average Talk Time (ATT)	Average number of minutes, per call, spent by the agent talking on calls originating through a Call Queue. Excludes hold time.
Assisted Calls Handled (AST)	Number of calls answered and then forwarded to another agent.
Average ACW Time (ACW)	Average time an agent spends between the end of a call and submitting call disposition.
Average Hold Time (AH)	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
Average Handle Time (AHT)	Average time an agent spent on a call. Includes Talk Time (TT), Hold Time (AH), and Disposition Time (ACW).
Missed Calls (MC)	Number of calls originating through a call queue offered to an agent but not answered. This includes multiple attempts if a call loops through all agents, but excludes unanswered simultaneous ring calls.
Outbound Attempts (OATT)	Number of outbound call attempts by an agent. Excludes on-net calls and conference calls.
Outbound	Number of outbound calls by agent answered by a remote party. Includes

Answered (OANS)	calls answered by voicemail. Excludes on-net calls and conference calls.
Outbound Minutes (OM)	Number of minutes spent by an agent on outbound calls. Includes talk and hold time. Excludes call center calls, on-net calls, and conference calls.
Outbound Average (OAvg)	Average length of time spent by an agent on outbound calls. Excludes call center calls, on-net calls, and conference calls.
Inbound Answered (IANS)	Number of inbound answered calls to an agent. Includes call center calls. Excludes on-net calls and conference calls.
Inbound Minutes (IM)	Number of minutes spent by an agent on inbound calls. Includes call center calls. Includes talk and hold time. Excludes on- net calls and conference calls.
Inbound Average (IAVG)	Average length of time spent by an agent on inbound calls. Includes call center calls. Excludes on-net calls and conference calls.

Agent Availability

The Agent Availability report displays an agent's availability in a domain or in a department within a domain. It will display the time an agent's status was set to online or set to lunch, etc. during the selected time period.

Managers can utilize this report to quickly see when one agent is available and another agent is not. Orange displays availability in this example. Hover over a column header's "i" icon to view an explanation about what is displayed in that column.



Here are the configurable attributes available within an Agent Availability report. Select or deselect them in Table Settings to show or hide. Optionally, select to "hide rows with no data".

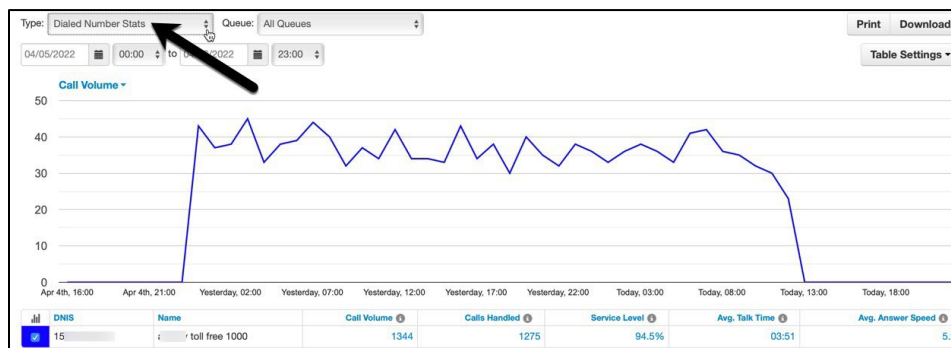
Stats	Definition
Extension	This is the call center agent's extension.
Domain	If managing multiple domains, this shows which domain the call center agent is in.
Department	If a department has been assigned, this is the call center agent's department.
Logged In (LI)	This is the total time the call center agent's status was set to "online".

Available (AM)	This is the total time the call center agent was available for calls. This includes time logged in / online. It excludes statuses of unavailable such as break, lunch, meeting, web, and other.
Unavailable (UM)	This is the total time the call center agent was not available for calls. Includes time logged off and offline statuses such as break, lunch, meeting, web, and other. Excludes online / available.
Lunch (L)	This is the total time the call center agent's status was set to "lunch".
Break (B)	This is the total time the call center agent's status was set to "break".
Meeting (M)	This is the total time the call center agent's status was set to "meeting".
Other (O)	This is the total time the call center agent's status is not set to available, break, lunch, meeting, or web. Excludes unavailable status.
Web (W)	This is the total time the call center agent's status was set to "web".

Dialed Number Stats

The Dialed Number Stats report displays information based on the DNIS, which is a telephone service that informs the receiver about a call that the caller dialed. It is a common feature of 1- 800 and 1-900 services. When there are multiple 800 or 900 numbers to the same destination, the DNIS identifies which number was called.

Uncheck and check the numbers in the Queue dropdown to graph them individually or as a group. Each number will be automatically color-coded.



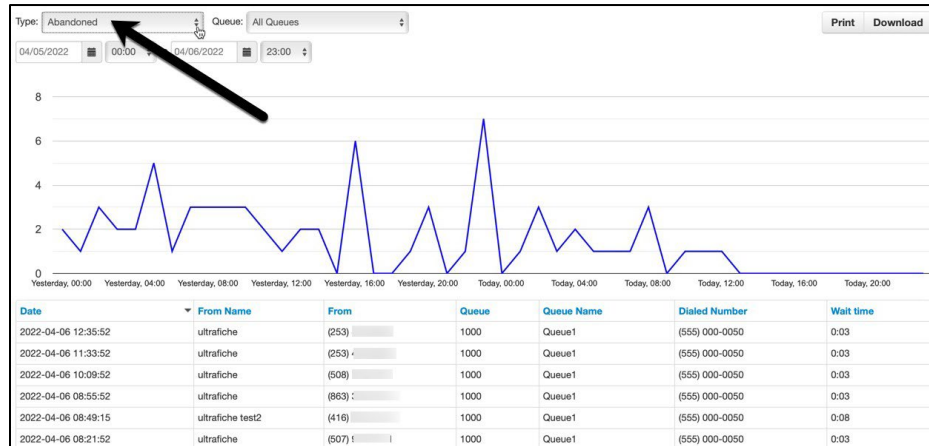
Here are the configurable attributes available within a Dialed Number Stats report. Select or deselect them in Table Settings to show or hide. Optionally, select to "hide rows with no data".

Stats	Definition
Call Volume (VOL)	Number of calls originating through a Call Queue. Includes answered calls, abandoned calls, forwards, and voicemail.
Calls Handled (CH)	Number of calls answered by agent originating through a Call Queue.
Calls Offered (CO)	Number of calls that reached the queue to be dispatched to agents. Includes abandoned calls. Excludes forwards and voicemail.
Adjusted Calls Offered (ACO)	Adjusted number of calls that reached the queue. Excludes calls abandoned in less than 10 seconds. (Calls Offered CO) - (Adjusted Abandoned Calls AAC)

Voicemail (VM)	Number of calls handled by the automated voicemail system.
Forward (FWD)	Number of calls forwarded to another queue or off-net phone number for handling. Includes forwarded calls to voicemail.
Average Talk Time (ATT)	Average number of minutes spends per call by an agent talking on calls originating through a Call Queue. Excludes hold time.
Assisted Calls Handled (AST)	Number of calls answered and then forwarded to another agent.
Average ACW Time (ACW)	Average time an agent spends between the end of a call and submitting call disposition.
Callbacks (CW)	Number of calls that requested a callback rather than waiting in the queue.
Average Hold Time (AH)	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
Service Level (SL)	The ratio of calls meeting the configurable service level agreement.
Percent Dial Transfers (DT)	Percentage of calls that landed in the queue and were offered to an agent.
Abandoned Calls (AC)	Number of calls that abandoned the queue before being offered to an agent.
Adjusted Abandoned Calls (AAC)	Adjusted number of calls that abandoned the queue. Excludes calls abandoned in less than 10 seconds. (Abandoned Calls) - (Number of calls abandoned in less than 10 seconds)
Abandon Rate (AR)	Percentage of calls offered that were abandoned. (Abandoned Calls AC) / (Calls Offered CO)
Adjusted Abandon Rate (AAR)	Percentage of calls offered that were abandoned in under 10 seconds. (Adjusted Abandoned Calls AAC) / (Adjusted Calls Offered ACO)
Average Handle Time (AHT)	Average time an agent spent on a call. Includes Talk Time (TT), Hold Time (AH), and Disposition Time (ACW).
Average Wait Time (AWT)	Average number of seconds a caller spent in the selected queue before being dispatched to an agent. If none selected, total for all queues will be displayed.
SMS Volume (SMS_VOL)	Number of SMS sessions originating through a Call Queue. Available in Portal v40 and higher.
SMS Average Handle Time (SMS_AHT)	Average time an agent spent handling an SMS session, beginning from the moment the message was accepted until it was ended. Available in Portal v40 and higher.

Abandoned Calls

The Abandoned Calls report displays call center graphs for abandoned calls, organized by individual queues. Time is measured along the x-axis and the number of calls abandoned is measured along the y-axis. All of the abandoned calls for the queue appear below the graph, along with statistics about each individual call.



There are no configurable attributes for this report. Table Settings is hidden while it is displayed.

Call Center Analytics

Call Center Analytics is a feature that allows you to create customized dashboards or wallboards for call center environments. You can select the data you want to track and display on this boards during the day to keep track of the performance of your call center.

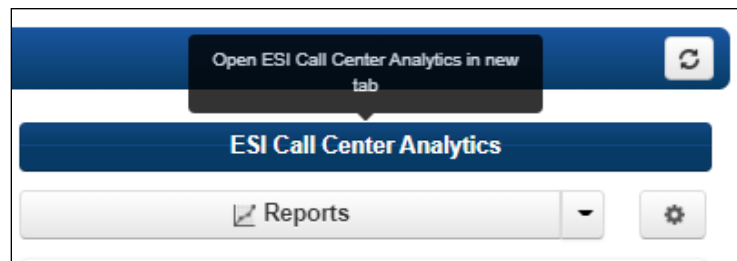
In this document two terms will be used throughout when describing the functionality of the feature and in the instructions on how to customize your own boards -

- **Board** - a collection of customized cards arranged for viewing.
- **Card** - a customizable widget that contains charted data or content.

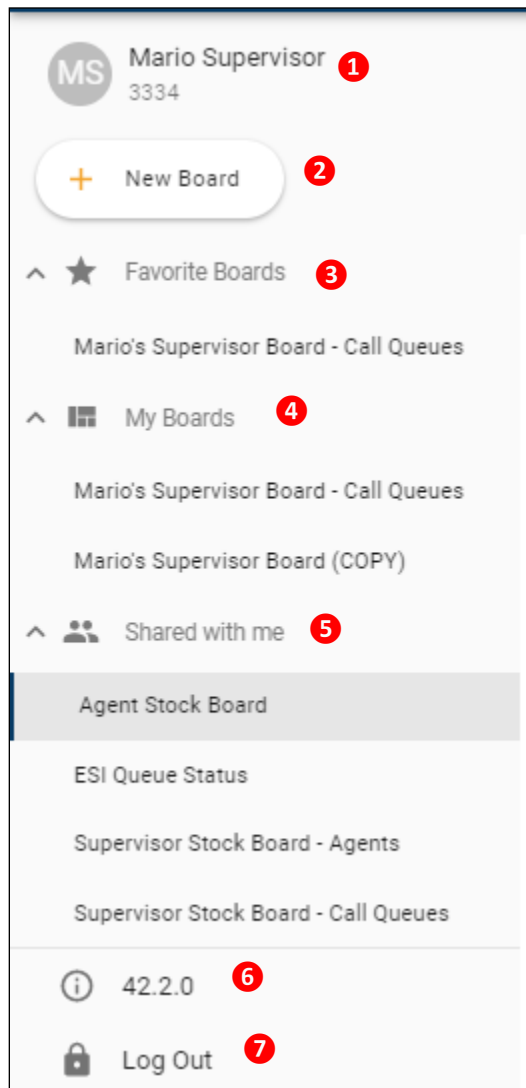
Accessing the Call Center Analytics

To access Call Center Analytics, log into the eConsole with a User Scope that has already been given access to Call Center features and navigate to the Call Center Home. To the right of this panel there is the button to order reports and right above that, you will find a new button labeled **ESI Call Center Analytics**. Click

on this button to launch the board (please notice that this may take a few seconds while call center data is gathered).



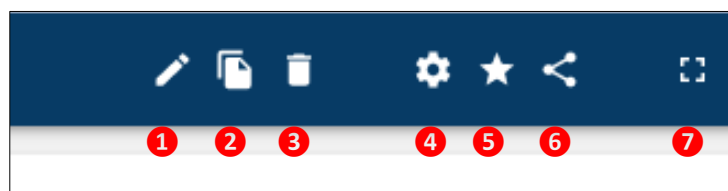
This action will open up a new browser tab with a Stock Board for Agent or Supervisor, depending on your user role. In the new tab you will find the MAIN MENU button as shown below.



1. Your name and extension
2. Add a new board
3. List of your favorite boards
4. List of boards owned by you
5. List of boards that others have shared with you
6. Platform version
7. Log out button

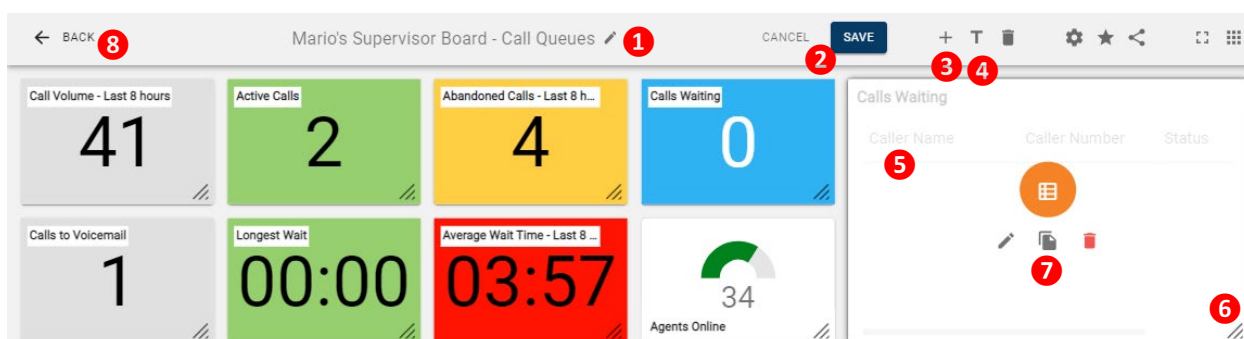
Managing your board

To the right of the main panel on your board, you will see several icons that allow you to perform several tasks to manage your board.



1. **Edit board** - Enter board edit mode where you can change the cards and contents of the board.
2. **Copy board** - Copy a board and create a duplicate that will appear in your list of boards. Copied boards have all content and settings from the original board.
3. **Delete board** - Permanently delete a board so it's no longer viewable.
4. **Board settings** - See "Board settings" section.
5. **Favorite board** - Favorite the board so it shows up in your list of favorite boards in the side navigation.
6. **Share board** - See "Sharing a board" section.
7. **Enter full screen** - Toggle between normal and full screen viewing.

Adding and editing a board



When you click on the Add Board button, you enter into the edit mode of the app. This is indicated by the change in color of the app top bar and a new set of buttons are available to customize your board.

1. **Edit board name** - Change the board's name.
2. **Save or cancel changes** - After making changes made to a board, save and cancel buttons will appear. You can save or revert any changes made.
3. **Add card** - See "Adding a card" chapter of this document.
4. **Add header** - Add a simple text header to help create card groupings or sections. You can adjust header width and font size.
5. **Drag and drop cards** - Click and hold on any card, then drag to the desired position.
6. **Drag to resize cards** - Click and hold on the corner handle, then drag to resize.
7. **Card hover options** - Hover over a card to show some quick actions.
 - a. Edit card
 - b. Copy card
 - c. Filters (if applied)
 - d. Delete card
8. **Back** - Exit edit mode by clicking the back button.

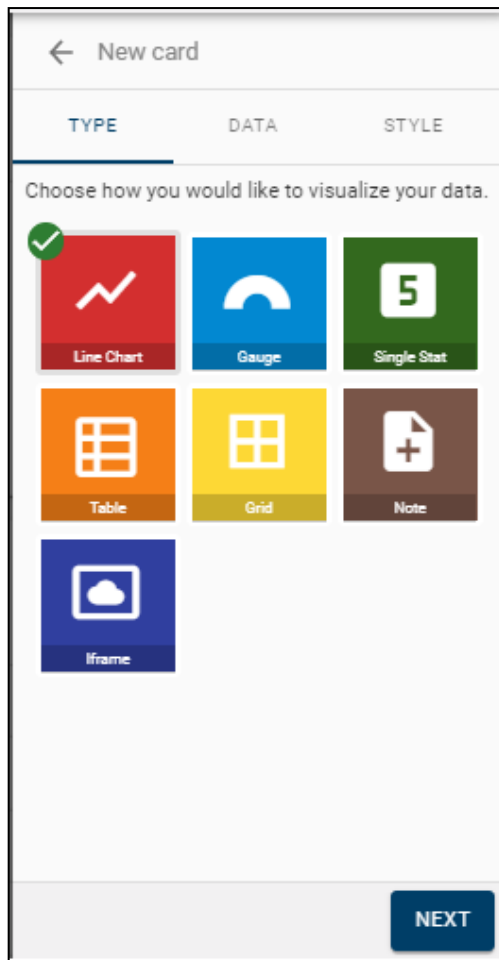
Adding a Card

Click the “Add Card” icon in the main Edit board panel. A new empty card will appear on the panel. Click on the “**CHOOSE TYPE**” button.



Setting the Card Type

A new editing panel will appear to the right. You will start in the “TYPE” tab and select one of the card types from the menu.

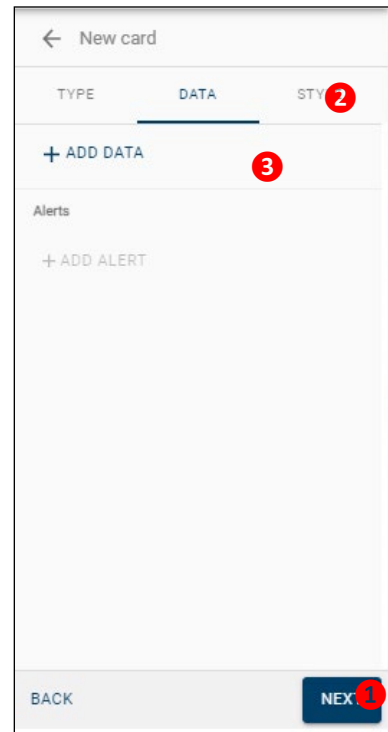


- **Line Graph** - One or more lines from a data set plotted over time.
- **Gauge** - A stat value with a gauge that fills to a specified limit.
- **Single Stat** - A single stat's value.
- **Table** - Data with multiple stats or descriptive information available in columns.
- **Grid** - Simple table arranged in a grid format to maximize number of items. (Data set limited to agents for v40 release.)
- **Note**: Customizable text content.
- **Iframe** - Display external web sites or resources.

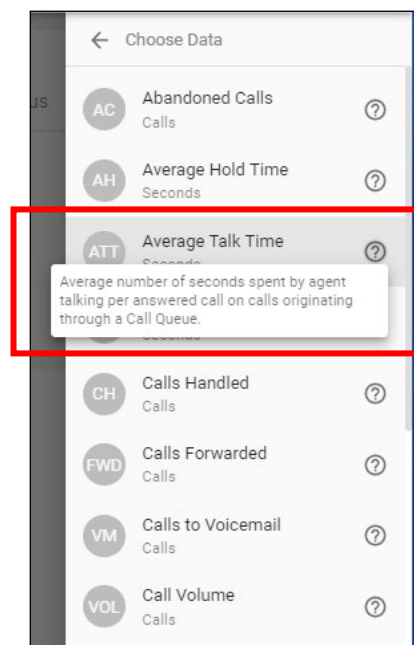
Card Data

Let's assume you select "Line Chart". You will now define "DATA" you want to display in this card type. Either click on the

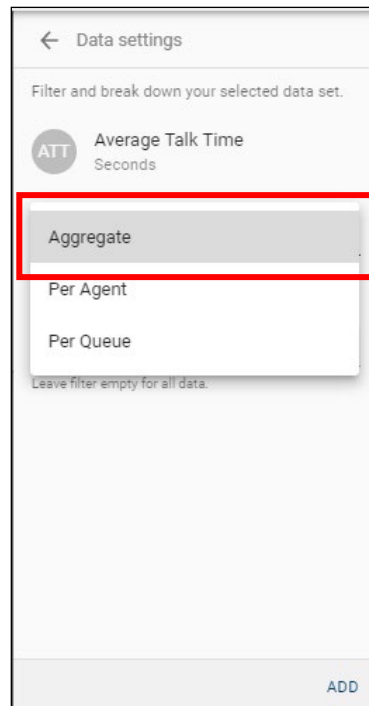
1. "NEXT" button or the
2. "DATA" tab to proceed and click the
3. "ADD DATA" button for this card.



From the Choose data menu, select the item you're interested in monitoring. Hovering your mouse over the question mark icon, you will see a description of what the data is. Let's assume you select "Average Talk Time" from the menu.



A new panel will open up for you to define the “Data settings”. Data settings will vary depending on the card and data you’re adding. In this case, the first item is the “Breakdown” of Average talk time. You will see the available options by clicking on the dropdown menu icon. Let’s assume you select Aggregate from that menu.



Data Filters

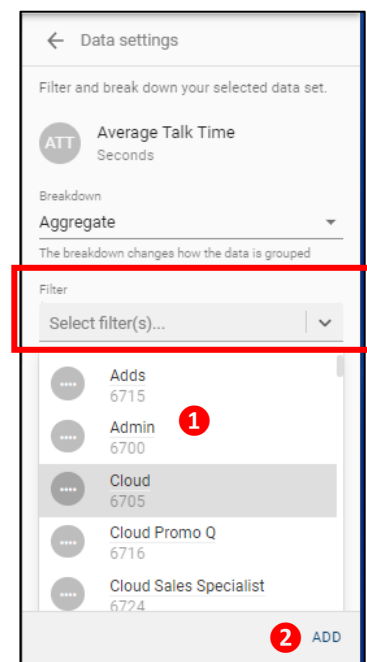
Filters for call queue, departments, sites, and agents can be applied to data sets.

Next, you will set the

1. “Filter” for the data you’re adding. In this example, the options shown correspond to the PBX we’re working with, your options will be different according to you PBX’s configuration.

Let’s assume you select the queue “Cloud” on extension 6705.

2. Now Click the “ADD” button.



Now you can set the “Time” parameters for the Card. In this example -

1. “Type” and
2. “Time Range”. Make your selections.

If you want to have a visual alert for this parameter that turns a certain color when a value threshold is crossed.

3. Click on the “ADD ALERT” label, otherwise;
4. Click the “NEXT” button.

The screenshot shows the 'New card' configuration interface. The 'TYPE' tab is selected, and the 'DATA' sub-tab is active. The card is titled 'Average Talk Time' with the unit 'Aggregate Seconds [6705 Cloud]'. The 'Time' section shows 'Type' set to 'Rolling' and 'Time Range' set to '24 Hours'. The 'Alerts' section has a '+ ADD ALERT' button. At the bottom, there are 'BACK' and 'NEXT' buttons.

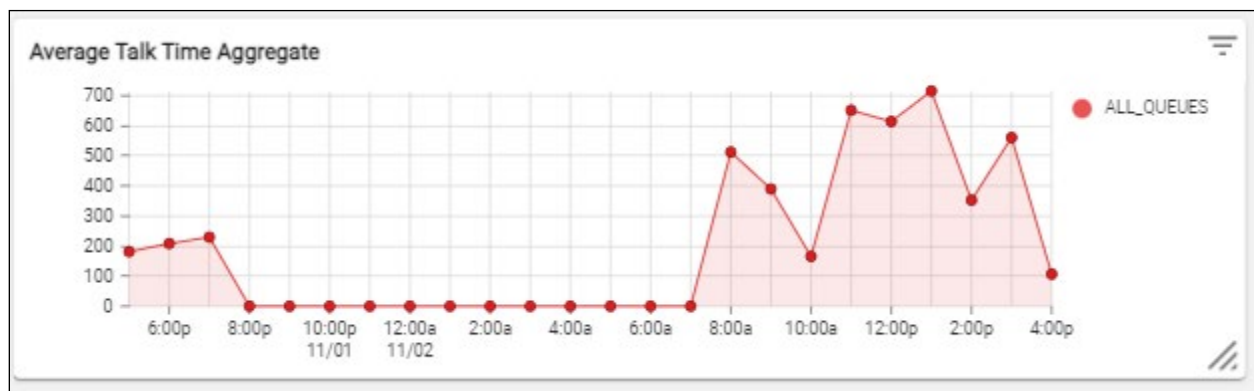
Alerts

1. Select which data set you want to monitor and set the alert to trigger when it's either **above** or **below** the specified threshold.
2. Select the color of your alert. This is the color you want the card to turn into when your alert threshold is crossed.
3. Click the “ADD” button

The screenshot shows the 'Configure Alert' interface. The 'Data set' is 'Average Talk Time'. The 'Data set to monitor for the alert' is 'Average Talk Time'. The 'When value is...' is 'Above' and the 'threshold' is '300 Seconds'. The 'Threshold to trigger the alert' section shows a color selection bar with a red color chosen. The 'Notifications' section has a 'Browser Notification' toggle switch.

3

Move and resize the card to the desired position on the board.

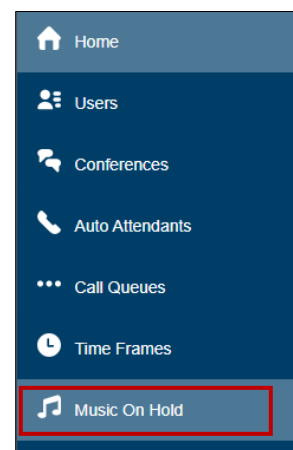


Music-On-Hold (MOH) for Queues

The purpose behind custom MOH (Music-on-Hold) is that messages can be added to the currently playing audio, e.g. while a customer is on hold, the music can now be briefly interrupted with a message, such as: "Your call is important to us. Please wait on the line and an agent will be with you shortly." This is often called a "comfort message" - a message or recording that reassures the caller to not hang up. The message can be used for advertising, for updating wait time, and more, and is configurable (time between messages, copying messages, etc.).

Each queue can have a different MOH. The Call Center Supervisor can manage those queues and upload new media to be played for MOH.

Warning: Your company and its users must be aware that when using copyright-protected contents, you must obtain a proper license to play it as MOH.



You can access MOH settings from the left navigation menu or the music icon button next to each queue in the queue list

The screenshot shows the 'Music On Hold / 5002' configuration page. It has a 'Back' button and a search bar. The page is divided into two main sections: 'Music' and 'Messages'.

Music Section: Includes a 'Randomize music' checkbox (checked) and an 'Add Music' button. Below is a table with columns 'Song Name', 'Duration', and 'Filesize'.

Song Name	Duration	Filesize
1 AcctgMOH	4:55	2.25 MB

Messages Section: Contains the text 'No messages added for this queue.' and 'Introduction will not be inherited from the organization. Messages will be inherited from the organization.' Below this are 'Add Introduction' and 'Add Message' buttons. A red box highlights a link that says 'Copy and modify messages from the organization'.

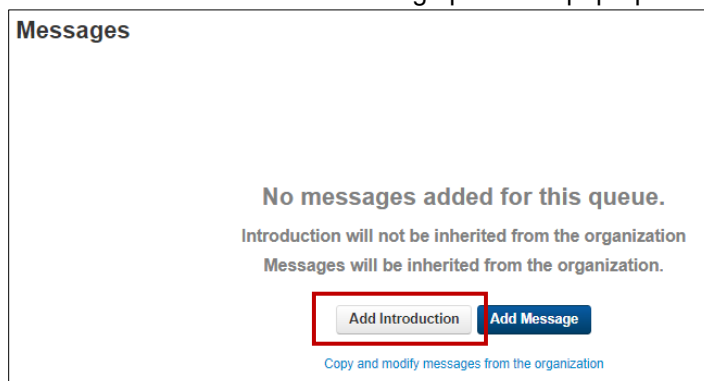
You may already have uploaded MOH files to the system, as shown in the figure above. For adding music for MOH, please refer to the Add Music to Queue section.

On the right hand side of the panel, you can add an "Introduction" message with the "Add Introduction" button, or a Message with the "Add Message" button. The Introduction message will play as soon as a user

places a caller on hold, if there is no Introduction message, then MOH will start immediately. The Comfort Message interrupts MOH at a given interval and plays that message to let the caller know that he is still on hold. The Introduction message and the Comfort message are customizable as shown below. Alternatively, you can use the Introduction Message and Comfort message(s) defined for the domain by selecting the "Copy and modify messages from the organization" text (shown in the figure above).

Adding an Introduction Message.

Click on the Add Introduction button and Add Intro Message panel will pop-up



Here you can define the contents of the introductory message. You can do that using Text-to-Speech, Uploading a recording you have stored in your computer, or recording the contents of the message right then. In the example below, the Text-to-Speech option is used. Type the contents of the Introduction Message, select the language you have used in the test and select the voice you want to use. You can hear the message by clicking on the "Play" icon. Once you're satisfied with it, click on the "Save" button.

The screenshot shows a dialog box titled "Add Intro Message". It has three radio buttons under "New Message": "Text-To-Speech" (selected), "Upload", and "Record". Below these is a text area labeled "Message" containing the text "While you're on hold, enjoy this music". There are two dropdown menus: "Language" set to "English (United States of America)" and "Voice" set to "Joanna". A play button icon is next to the voice dropdown. At the bottom right are "Cancel" and "Save" buttons.

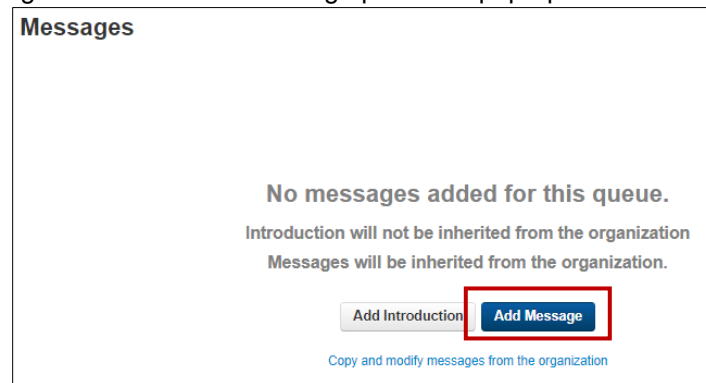
Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB).



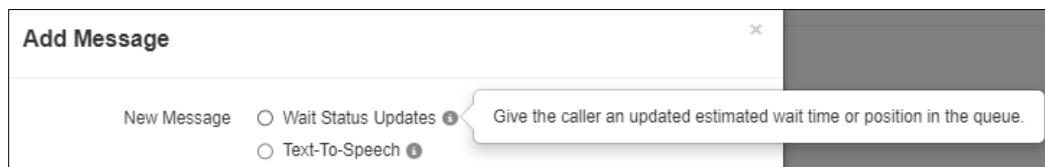
You can have only have one Introduction message.

Adding a Comfort Message

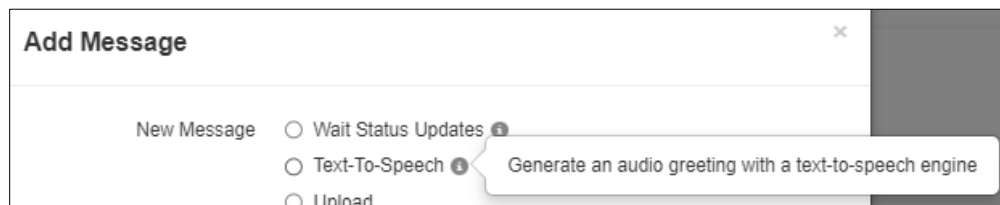
Click on the Add Message button and Add Message panel will pop-up



You will be presented with four options for creating the comfort message:

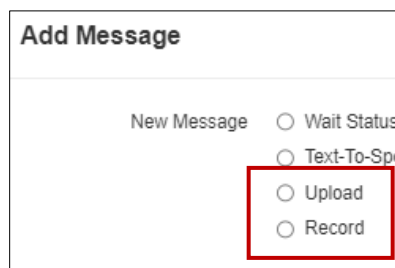


This option will generate an automatic message, informing the caller of his/her estimated waiting time and position in the queue, or



This option will use Text-to-Speech to generate a comfort message.

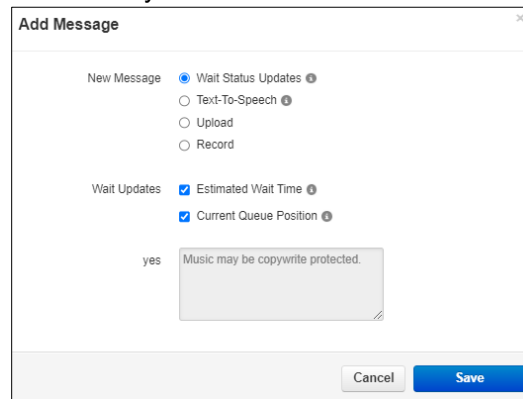
The other two alternatives are to either upload a pre-recorded message, or record the message right then, using your phone.



In this example we will use the first two options:

Wait Status Updates

When you select this option, a new panel will open up when you can select the estimated waiting time or the current queue position, or both. Make your selections and click on the Save button.



The 'Add Message' dialog box shows the 'New Message' section with 'Wait Status Updates' selected. Under 'Wait Updates', both 'Estimated Wait Time' and 'Current Queue Position' are checked. A text area contains the message 'Music may be copywrite protected.' and a 'yes' label. At the bottom are 'Cancel' and 'Save' buttons.

You will now see the recently created comfort message in the messages list:



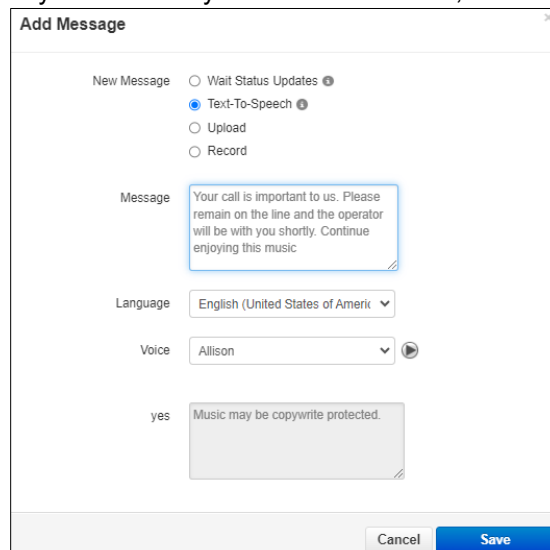
The 'Messages' interface shows a table with columns 'Messages', 'Duration', and 'Filesize'. A red box highlights the first message: '1 Wait announcement: Time, Position' with a duration of '0:00' and a filesize of '0 B'. Above the table is an 'Add Message' button and a '30' timer icon.

Messages	Duration	Filesize
No introduction added		
1 Wait announcement: Time, Position	0:00	0 B

Text-to-Speech

When you select this option, the Add Message panel will open up.


Here you can define the contents of the Comfort message. You can do that using Text-to-Speech, Uploading a recording you have stored in your computer, or recording the contents of the message right then. In the example below, the Text-to-Speech option is used. Type the contents of the Comfort Message, select the language you have used in the test and select the voice you want to use. You can hear the message by clicking on the "Play" icon. Once you're satisfied with it, click on the "Save" button.



The 'Add Message' dialog box shows the 'New Message' section with 'Text-To-Speech' selected. The 'Message' text area contains the text: 'Your call is important to us. Please remain on the line and the operator will be with you shortly. Continue enjoying this music'. The 'Language' dropdown is set to 'English (United States of Americ)' and the 'Voice' dropdown is set to 'Allison'. A 'Play' icon is next to the voice selection. At the bottom are 'Cancel' and 'Save' buttons.

Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB). You should now be able to see what music,

Call History

The Call History icon  **Call History** will take you to the Call History page where you will view the calls made on your domain for the specified date range. The call record will show To and From whom the call was made.

Call History							
Filters		09/14/2023 — 09/15/2023		Queue 6712 - Cloud III		Export	
From Name	From	QOS	Dialed	To	QOS	Date	Duration
[V] WIRELESS CA	1 (518)	4.5	1 (972) 422-9700	2359	4.5	Today, 12:24 pm	6:07
[V] Executech	1 (385)	4.5	1 (800) 491-3609	2172		Today, 12:11 pm	6:21
MILES HARRIS	1 (434)		1 (800) 491-3609	2327	4.5	Today, 12:02 pm	4:14
CHRIS WATERS	(724)		611	2172		Today, 11:58 am	1:36

Call History Filters

You can change the date range by clicking the Filters button in the upper left of the screen. After clicking the filter button, the Call History Filters window will appear. Here you can change the Call History date range, user, department, site, caller number, dialed number and call type.

Call History Filters

From

08/15/2023

To

08/16/2023

User

Enter name or extension

Department

Enter department name

Site

Enter site name

Caller Number

Enter the caller's number

Dialed Number

Enter the dialed number

Call Type

Select a call type

Clear Filters

Cancel

Filter

- **From** - Select a date.
- **To** - Select a date that is greater than the From date.
- **User** - Enter the extension number of a specific user.
- **Department** - Enter a department name.
- **Site** - Enter the site name on which the user resides.
- **Caller Number** - Allows you to search for calls from a specific phone number by entering the number into the Caller Number field.
- **Dialed Number** - The Dialed Number field will let you filter for a specific number that you dialed.
- **Call Type** - The Call Type drop down lets you filter based on the type of call. Inbound, Outbound, or Missed call.

Call Type

Select a call type


Select a call type

Inbound

Outbound


Missed

Calls Displayed

Clicking the Filter button  will then display the calls that match the filter criteria. You can set the Call History to display 15, 25, 50, and 100 calls per page.

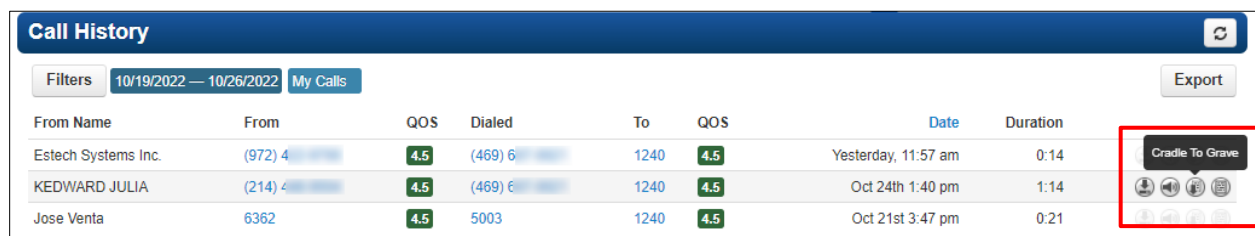
View:    





Exporting Call History

The export icon  allows you to download the call history into a csv file that can be opened in any spreadsheet application such as Excel or Apache Open Office.

Cradle to Grave

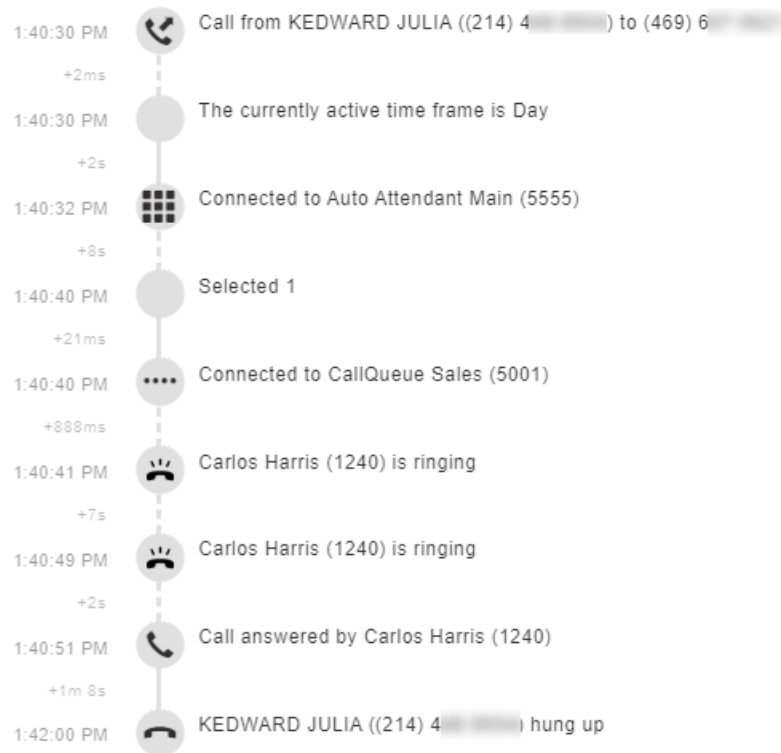
Available for office managers and contact center supervisors, a call trace is a comprehensive listing of all technical information captured during a call from the moment a connection is first being attempted until the call ends. Cradle to Grave is a call trace functionality, but it presents the resulting call data in accessible terms rather than technical call flows. Cradle to Grave is available through the call history tab in the eConsole.



Call History								
Filters		10/19/2022 — 10/26/2022		My Calls				Export
From Name	From	QOS	Dialed	To	QOS	Date	Duration	
Estech Systems Inc.	(972) 4	4.5	(469) 6	1240	4.5	Yesterday, 11:57 am	0:14	
KEDWARD JULIA	(214) 4	4.5	(469) 6	1240	4.5	Oct 24th 1:40 pm	1:14	
Jose Venta	6362	4.5	5003	1240	4.5	Oct 21st 3:47 pm	0:21	

By Clicking on the Cradle To Grave icon shown in the picture above, a new panel will open up showing a simplified sequence of events that occurred for that particular call. The picture below shows an example of such sequence.

Cradle To Grave



Call Transcription and Sentiment Analysis

Call Recording Transcription is the conversion of the audio in a recording into plain text. The conversion is done once the recording is complete and so, the transcription may take a few minutes to be available, depending on the duration of the call. Sentiment Analysis is a powerful add-on feature that interprets the transcribed text of a call recording into qualitative terms (the text was neutral, positive, or negative) and then quantifies it throughout the transcript (for example – 2-neutral segments, 3-positive, 1-negative).

Viewing the call transcription and sentiment analysis for a call

Call recording transcription is available through the Call History tab in the eConsole. If call recording has been configured, the speaker icon ("listen") in a call's row will be clickable. If **Call Recording Transcription** has not been configured, then the call recording will display as an audio player only.

To view the call transcription (and sentiment analysis if applicable) for a given call in a queue, click on the speaker icon ("listen") to the far right of the concerned call.

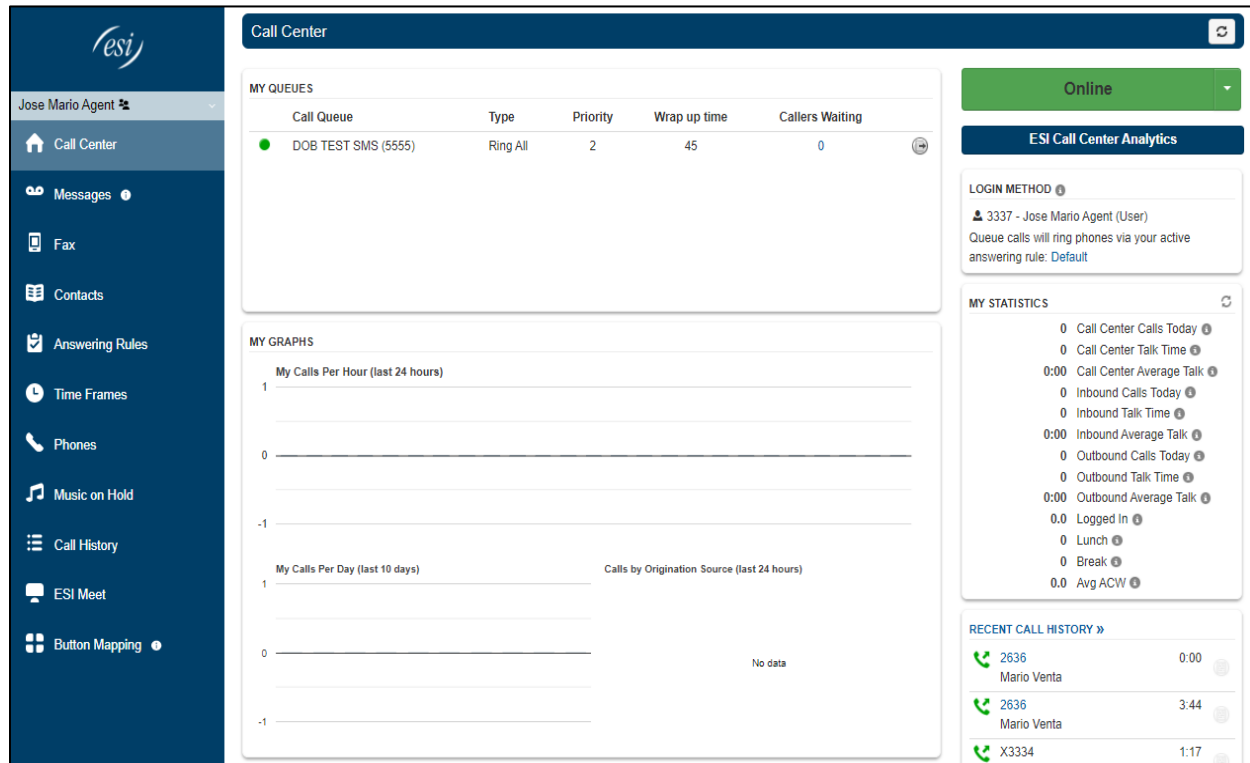


This will open up a panel with the full transcription of the call and the sentiment analysis for it (if enabled). The audio recording of the call can be played as usual and the transcription and sentiment analysis panels will advance accordingly. The different segments of the call will be highlighted according to the sentiments color settings displayed in the panel.

Call Center Agent

Dashboard Layout

On the Call Center screen, Call Center Supervisor can view a list of the Call Queues that they belong to, the On-Line/Off-Line control button, Access to the Call Center Analytics, Information on the login method, a panel with its own call center statistics and a panel with recent call history.



My Queues table

This table lists all the queues that the agent belongs to.

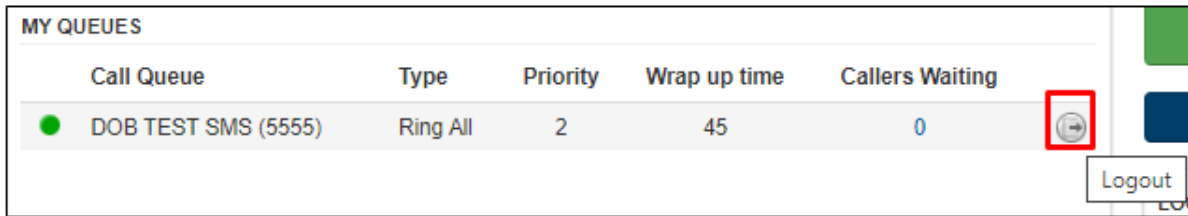
MY QUEUES				
Call Queue	Type	Priority	Wrap up time	Callers Waiting
DOB TEST SMS (5555)	Ring All	2	45	0

The information provided in the table include -

- The name of the queue(s)
- The type of queue as specified by its hunting type.
- The priority the agent has in that particular queue.
- The wrap-up time the agent has been assigned for that queue.
- The current number of callers waiting in that queue.

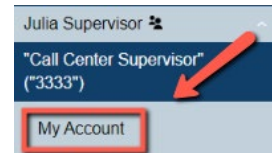
Logging out of a queue

Any agent can temporarily log out of a queue by clicking on the logout icon.



Logging in to a hot-desking device

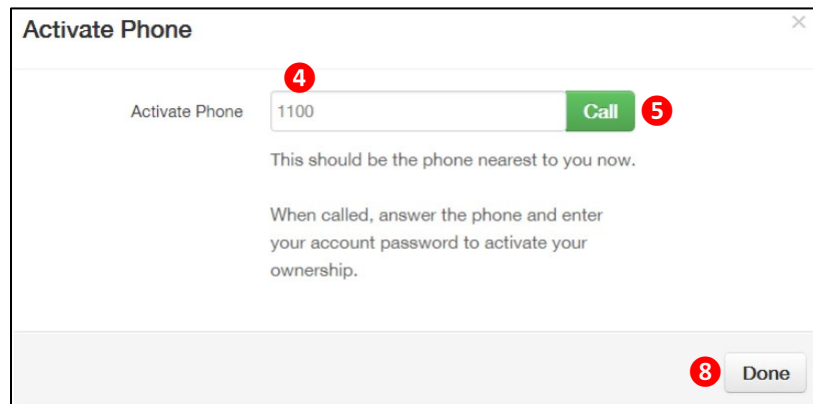
1. Login to the eConsole. For Agent-only users this will be your home page. If you are also a Supervisor go to your account once logged into eConsole.
2. Click **Phones** if the left-hand menu.



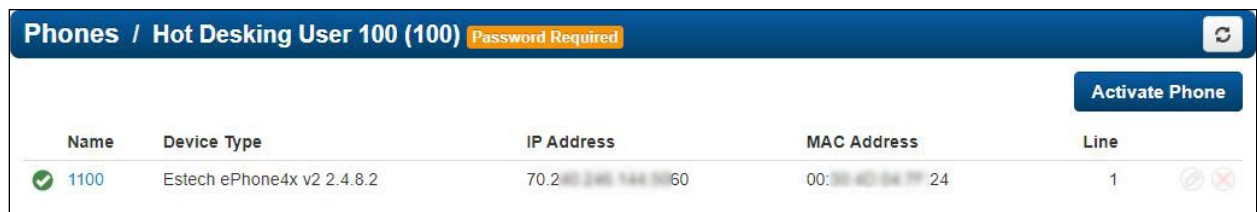
3. Click the **Activate Phone** button on the top right.




4. In the Activate Phone panel, enter the extension number of the Hot-desking device in the station you're about to use.



5. Click the Call button.
6. The Hot-desk phone will ring.
7. Answer and enter the user's password.
8. Click the Done button
9. The Phones screen should look like the screenshot shown below
Note: The Hot-desk phone will now accept inbound calls to that user and will also track the inbound and outbound traffic of the user.



10. The user can release themselves from the hot-desking device by clicking on the  next to the device in the **Phones** section of the eConsole.

11. Navigate to the answering rules panel in eConsole. You should see something similar to this (with your own extension number)

Answering Rules / Hot Desking User 100 (100) Password Required

Ring for 25 seconds

Allow / Block Add Rule

Time Frame	Description
Default Active	Ring x100

12. Click on the edit icon for that answering rules



13. Checkmark the Call Forwarding – Always option and find your extension number from the dropdown menu and click on Save

Edit Answering Rule

Time Frame: Default This is when your answering rule will apply

☒ Enabled

☐ Do not disturb

☐ Call screening

Call Forwarding ☒ Always Phone - 1100 (Hot Desking User 100)

☐ When busy Extension, number or phone

☐ When unanswered Extension, number or phone

☐ When offline Extension, number or phone

☐ Simultaneous ring ☒ Include user's extension
☐ Ring all user's phones
☐ Answer confirmation for offnet numbers
Extension, number or phone ... +

☐ Just ring user's extension

Cancel Save

14. The answering rule should now look similar to this -

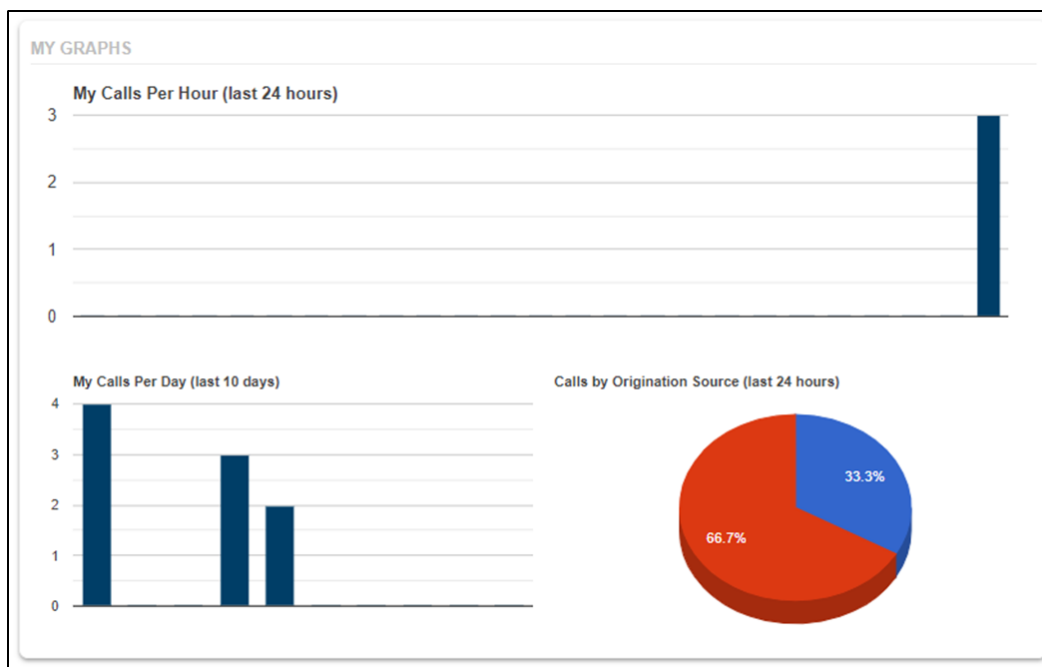
Answering Rules / Hot Desking User 100 (100)
Password Required

Ring for seconds
Allow / Block
Add Rule

Time Frame	Description
<div> <div></div> Default Active </div>	Forward always to Phone - 1100 (Hot Desking User 100)

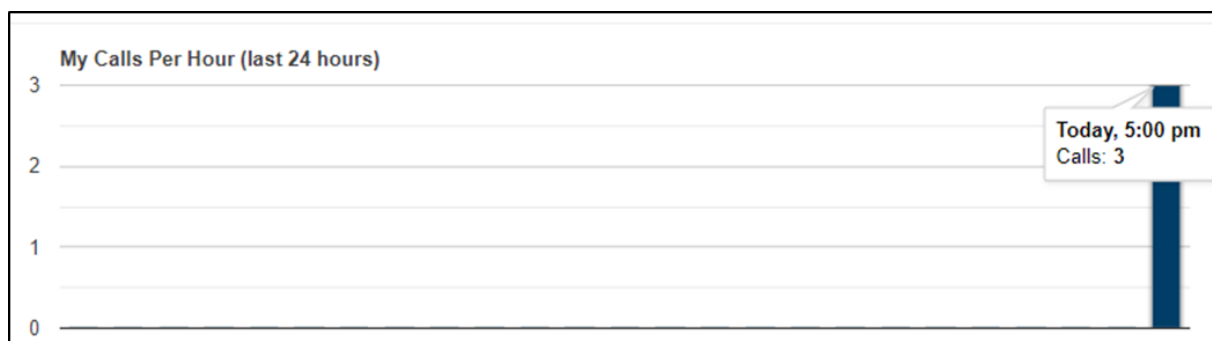
You're all set to start using that station (phone).

My Graphs table



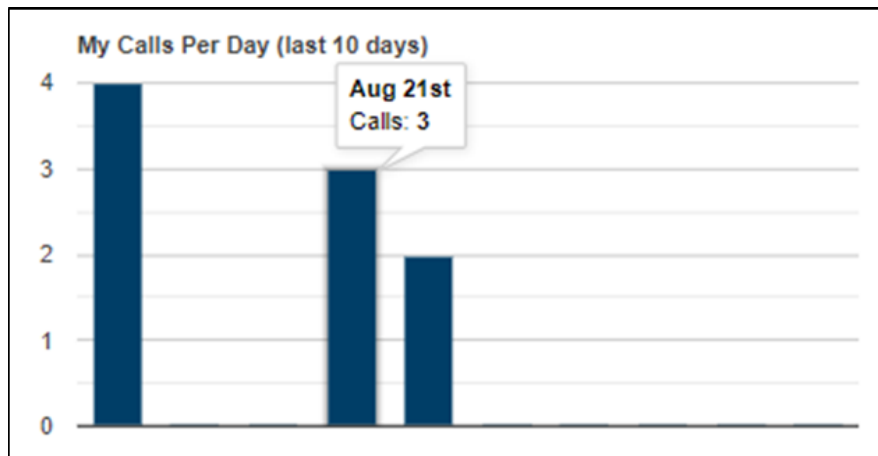
The My Graphs table contains information about recent call activity for the agent and it is divided into three sections as follows -

Calls per hour in the last 24 hours



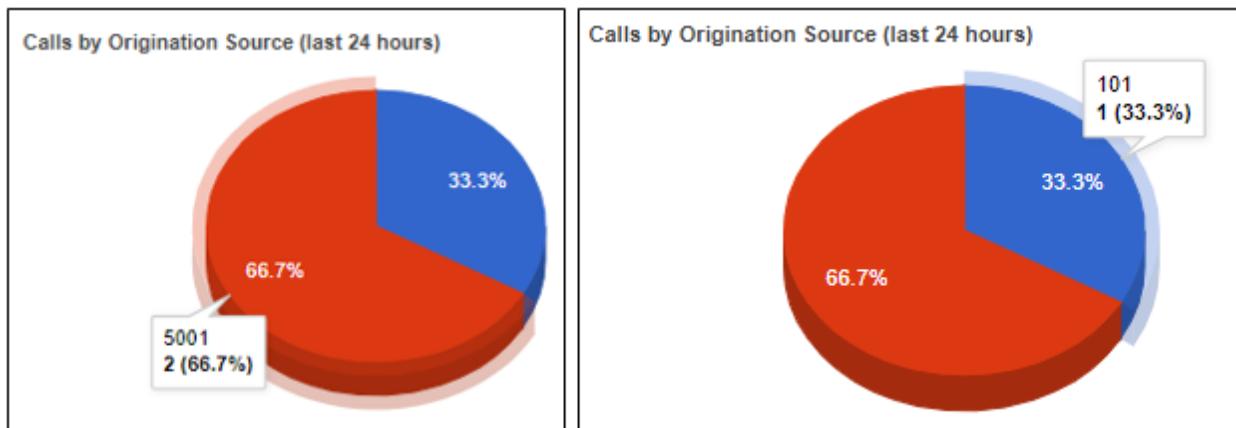
This graph as its name indicates, provides statistical information about the number of calls the agent has processed in the last 24 hours, each hour in the graph contains the number of calls processed in that hour.

Calls per day in the last 10 days



This graph provides information similar to the previously described one, except contains the same data for the last 10 days.

Calls by Originating Source in the last 24 hours

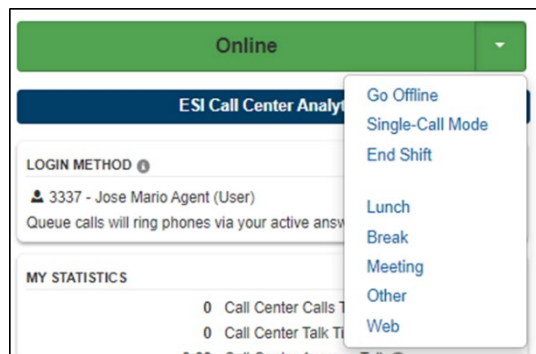


This graph breaks down the number of calls processed in the last 24 hours by the origin of them. In the graphs above 66.7% of the total number of processed calls were received from queue 5001, while 33.3% of the calls received by this user were calls directly dilled to his extension number (101).

Online/Login button

The main button toggles the agent status between Online and Offline.

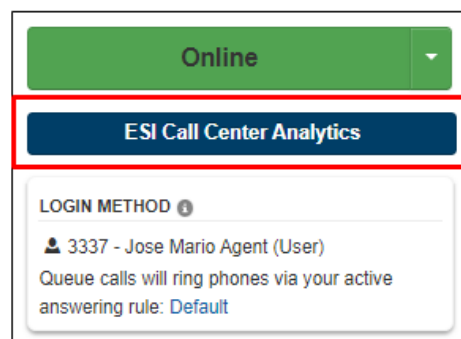
The dropdown menu allows the agent to select from the various agent status that the call center supervisor has set for the call center.



ESI Call Center Analytics button

Click on this button to launch the board (please notice that this may take a few seconds while call center data is gathered).

A new browser tab will open up with the default Call Center Analytics board. As an agent, you can edit the contents of the board to suit your individual needs. For information about changing the contents of the Analytics board, please refer to the section titled "Managing your board" in the "Call Center Supervisor Dashboard Layout" section of this manual.











My Statistics table

MY STATISTICS		
Call Center Talk Time (min)		Today ⓘ
Number of minutes spent on answered Queue Calls today		ⓘ
2	Inbound Calls Today	ⓘ
5	Inbound Talk Time	ⓘ
2:12	Inbound Average Talk	ⓘ
0	Outbound Calls Today	ⓘ
0	Outbound Talk Time	ⓘ
0:00	Outbound Average Talk	ⓘ
0.0	Logged In	ⓘ
0	Lunch	ⓘ
0	Break	ⓘ
0.0	Avg ACW	ⓘ

This table summarizes useful statistics for the call agent -

Hover your mouse over the icon next to each field to display a brief description of each statistic.

Recent Call History table

RECENT CALL HISTORY »		
 1 (972) 422-9700 Mario Venta	3:56	
 100 Hot Desking User 100	0:23	
 1 (972) 422-9700 Mario Venta	0:28	
 100 Hot Desking User 100	0:00	

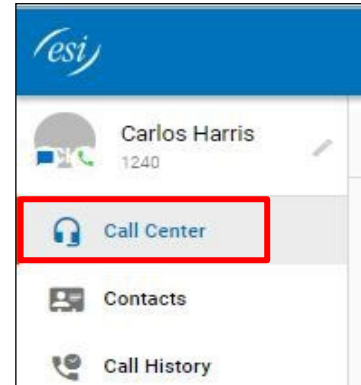
This table displays a summary of the recent call history for the agent. Please notice that this table does not contain all the information displayed in the Call History tab in the main eConsole menu.

Clicking on the Notes icon to the right of the call duration, allows the agent to enter notes for that call such as call dispositions that the call center supervisor had set for the call center.

Webphone for Call Center Agents and Supervisors

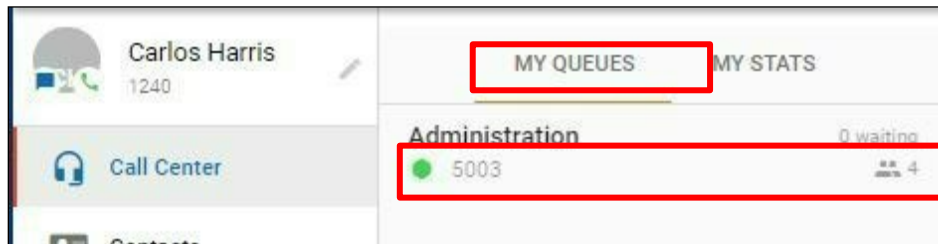
Users with Role of Agents or Supervisors have an enhanced Webphone that includes -

1. A new “Call Center” tab on the main Webphone menu.

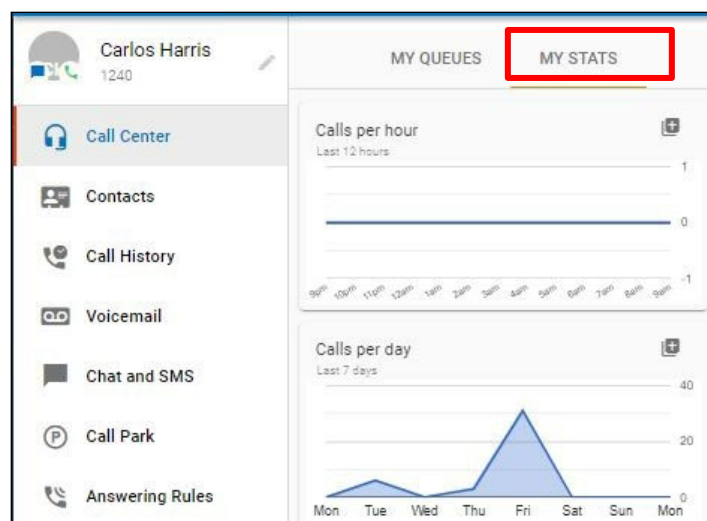


2. The Call Center option then opens two additional tabs:

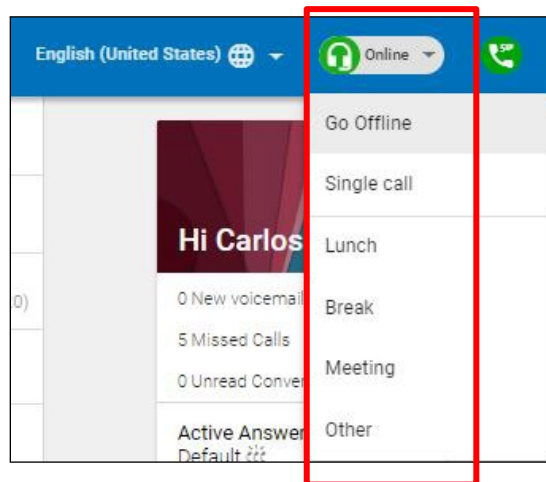
- a. The “My Queues” tab, which displays the queues the agent is logged into, the number of agents assigned, and the number of calls waiting. From here, the agent can log in and out of specific queues. Clicking on the queue, will add this Card to the dashboard.



- b. The “My Stats” tab, which displays user stats using charts. Clicking on the queue, will add a Card to the dashboard.

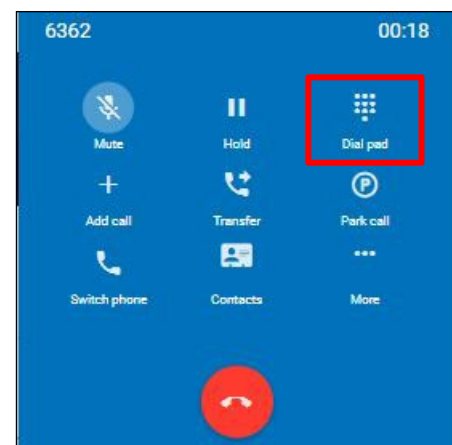


3. The Status control on the upper right controls the agent's status for the queues the agent belongs to.

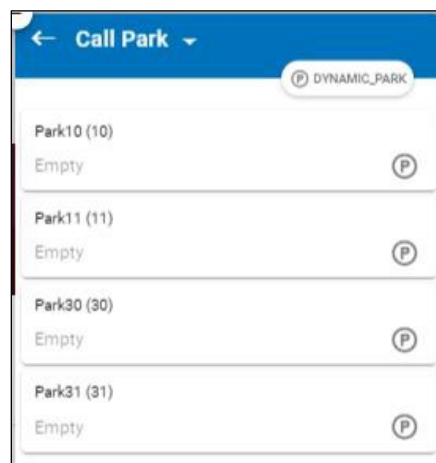


Call Parking in Webphone

It is possible now to use Call Park from the Webphone. On the active call screen, there is a new easily identifiable icon for Call Parking.



When clicking on that icon, a new window will open up giving the agent the choice of which orbit to park the call in.



On the main Webphone's menu, there is a new tab to monitor the parked calls in the various parking orbits. The Call Park panel indicated which orbit the call is parked at and who parked the call.

