ESI eSIP Evolution e-Series Server

Operator Panel User's Guide

This user's guide provides step-by-step procedures and reference information about using the web-based Operator Panel. This guide is intended for operators and receptionists who need to manage calls and user presence on the Operator Panel.

About This Guide

This user's guide provides step-by-step procedures and reference information about using Operator Panel.

Note: eMobile Web Client referenced throughout this document refers to the eSIP Webphone.

Audience
This guide is intended for operators and receptionists who need to manage calls and user presence on the Operator Panel.

Operator Panel Overview

Operator Panel is a web-based utility integrated with the ESI eMobile Web Client. This topic describes what is Operator Panel, and what you can do on Operator Panel.

What is Operator Panel
A traditional receptionist needs to screen incoming calls for key areas of the business, and deliver core calls to the right destinations. It is obviously inefficient to perform a large number of call control operations through a desktop phone. ESI Operator Panel is designed for employee who needs to manage and transfer a large number of calls, such as receptionist or agent manager.
The Operator Panel integrates a call console, extension list, ring group list, queue list, parking number (Slot) list, and group voicemail list. It offers a comprehensive view on activity of call, ring groups, queues, park extensions, and group voicemails, enhances visibility of the extension's status, streamlines call handling, and more.
With Operator Panel, the receptionist can manage all incoming and outgoing calls with just a simple click or with drag and drop, which increases the efficiency of call management.

What you can do on Operator Panel

With an easy-to-use interface on ESI Operator Panel, you can manage multiple calls (including your group members' and yours), and direct calls to the appropriate destination quickly and efficiently.

- Monitor and switch the presence of extensions.
- Monitor the status of queue, ring group, park numbers, and group voicemails.
- Monitor the call activity in real time, including internal calls, inbound calls, and outbound calls.
- Manage internal calls, inbound calls, and outbound calls:
  - Call distribution: Redirect incoming calls and transfer calls.
  - Call connection: Pick up ringing calls and hang up calls.
  - Call parking: Park calls and retrieve parked calls.
  - Call recording: Monitor and switch recording status.
  - Calls monitoring: Barge in a call, listen to a call, and whisper to a call.
  - Place a call to a group member.
  - Leave a voicemail message.

Permission requirements

To use the Operator Panel to manage group members' calls and presence, you need to get the corresponding permission from your PBX system administrator:

- Switch group members' presence
- Call distribution management (Redirect, Transfer, Drag and Drop operation)
- Call monitoring operations (Listen, Whisper, Barge In)
- Call parking operations (Park, Retrieve)
- Switch Business Hours and Holidays status
- Switch extensions' recording status
- Pick up or hang up other extensions' calls
- Route calls directly from IVR regardless of the IVR menu

Getting Started

Access Operator Panel

The Operator Panel is integrated with ESI eMobile Web Client. This topic describes how to access Operator Panel.

Prerequisites

* eMobile Web client is enabled.
* Make sure that you have the permission to access Operator Panel.
* Get username and password from your system administrator.

Procedure

1. Log in to eMobile Web Client.

   > **ⓘ Tip:**
   > If you have received an eMobile welcome email, you can click the login link for eMobile Web Client to quickly log in.

   a. Launch your web browser, enter the IP address of eMobile Web Client, press Enter.
   b. Enter your username and password, click LOG IN.
      * Username: Email address.
      * Password: Extension User Password.
2. In the left navigation bar, click Operator Panel.
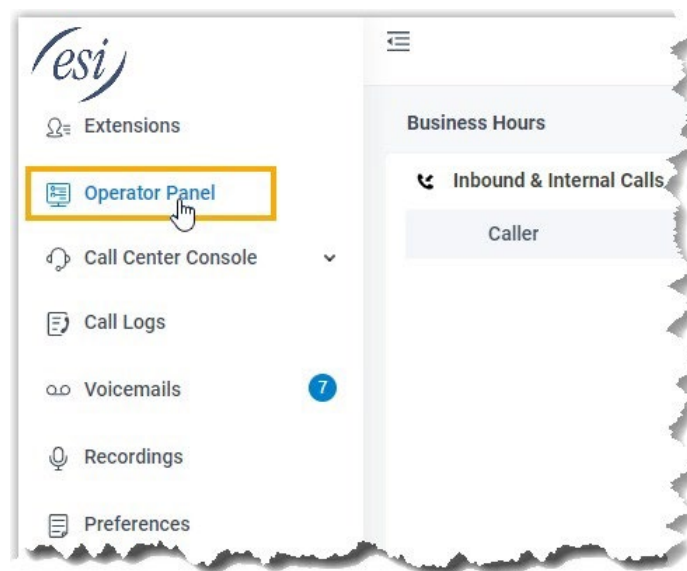
Operator Panel Layout

This topic provides an overview of Operator Panel interface.

Inbound & Internal Calls panel
Display the inbound and internal call information of your group member and you in real-time, including caller, callee, status, duration, and details.

Outbound Calls panel
Display the outbound call information of your group members and you in real-time, including caller, callee, status, duration, and details.
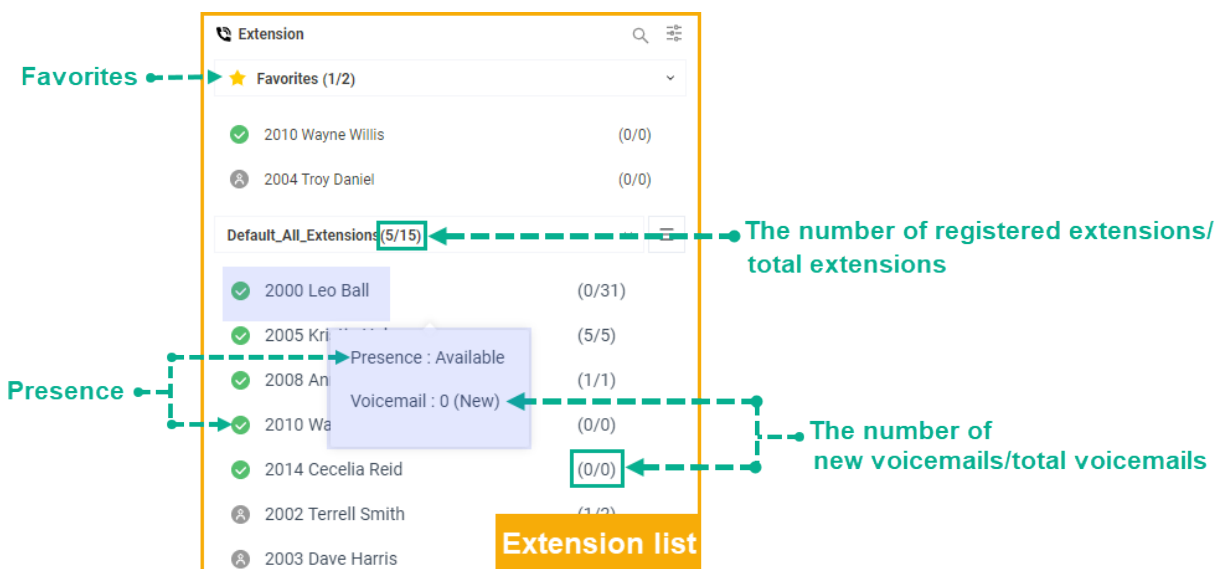

Outbound calls panel

Extension list
Display the extension information of your group/department and the group/department that is shared with you.
Hover your mouse over an extension user; you can see the presence status and voicemail status of the user.

Note:

- The Favorites list is displayed only when you add extensions to favorites.
  For the users whom you communicate with most often, you can right click their extensions, then select Add to Favorites.
- You can customize the departments or extension groups displayed on Extension list by clicking ⚙.
  For more information, see Customize Extension List.
- The unregistered extension is displayed on Extension list by default.
  You can disable Show Unregistered Extensions to hide the unregistered extensions: Preferences > User > Status Views

Extension list

User's presence

Icon	Presence	Description
👤	Unavailable	The user's extension is not registered.
🔴	Busy	The user is in a call.
✅	Available	The user is online and ready to receive and handle calls.
🟡	Away	The user is currently away from office.
💼	Business Trip	The user is currently on a business trip.
⛔	Do Not Disturb	The user doesn't want to be disturbed, and he/ she won't receive any calls.
🍴	Lunch Break	The user is currently on lunch break.
📤	Off Work	The user is currently off work.

Ring Group list
Display the status statistics of ring group members, including the number of available members and total members.

Ring Group list

Queue list
Display the agent status statistics of each queue, including the number of available agents and total agents.

Queue list

Parking Extension list
Display the status of each parking number.

Group Voicemail list
Display the status of each group voicemail.

- Broadcast messages to members: Only display group voicemail name and number.
- Shared messages by members: Display group voicemail name, number, and the number of new and total voicemail messages.
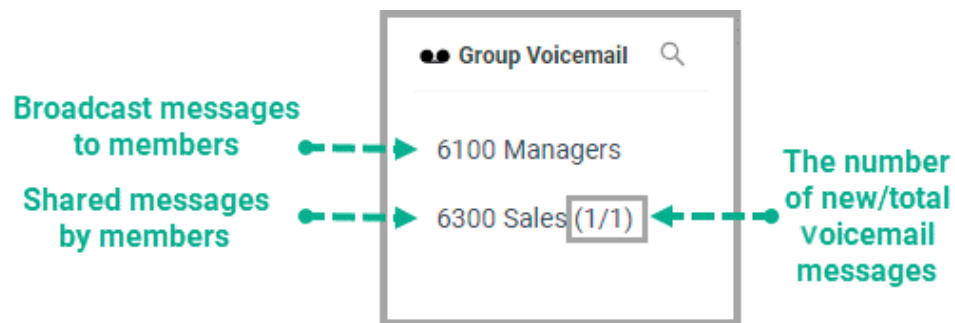
Customize Extension List

By default, the extension list may display the default extension group or display nothing, depending on whether system administrator has enabled the organizational structure or not. Anyway, you can customize extension list as needed.

Procedure

1. On the Extension panel, click ⚙.
2. In the pop-up window, select the desired departments or extension groups, then click Confirm.
   The selected departments or extension groups are displayed on the panel.
3. Optional: To adjust the order, hover your mouse over ≡, drag to the desired order, then drop.
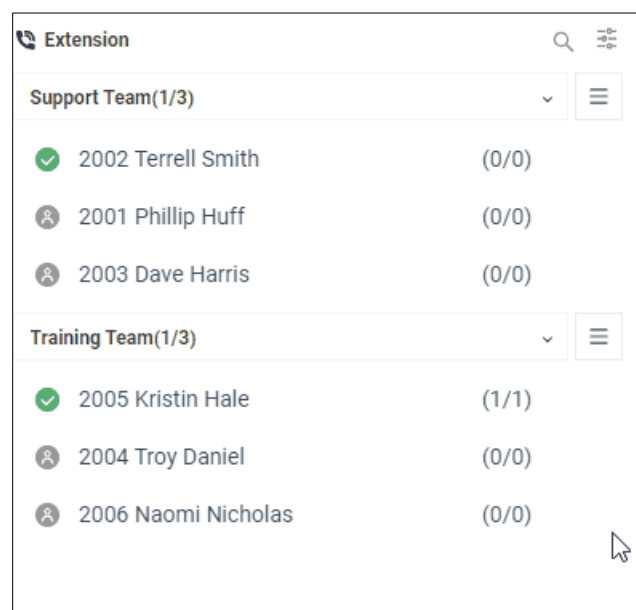
Calls Management

Pick up an Incoming Call

If a ringing call has not been answered for a long time, in order to save the caller's waiting time, you can pick up the incoming call for your group member. This topic describes how to pick up an incoming call.

Prerequisites

To pick up an internal call, or pick up extension group members' inbound calls, Pick up or hang up other extensions' calls permission is required.

Procedure

1. On the Inbound & Internal Calls panel, hover your mouse over a ringing call.
2. Right click the incoming call, and select Pick Up. The system routes the call to your extension.
3. Answer the call.

Redirect an Incoming Call

If a call has not been answered for a long time, in order to save the caller's waiting time, you can redirect the incoming call to another extension, ring group, queue, or extension's voicemail. This topic describes how to redirect an incoming call.

Prerequisites

- To redirect extension group members' incoming calls, Call distribution management (Redirect, Transfer, Drag and Drop operation) permission is required.
- To redirect an inbound call that reaches an IVR but hasn't gone to a destination yet, Route calls directly from IVR regardless of the IVR menu permission is required.

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Redirect an incoming call to an extension

1. On the Inbound & Internal Calls panel, hover your mouse over a call that is in Ringing status.
2. Transfer the call to an extension user in one of the following methods:
   - Drag the call and drop it on a desired extension in Extension list. The extension user will receive an incoming call.
   - Right click the call, click Redirect, and select a redirected party. On the pop-up panel, enter an extension number, and click ⟶. The extension user will receive an incoming call.
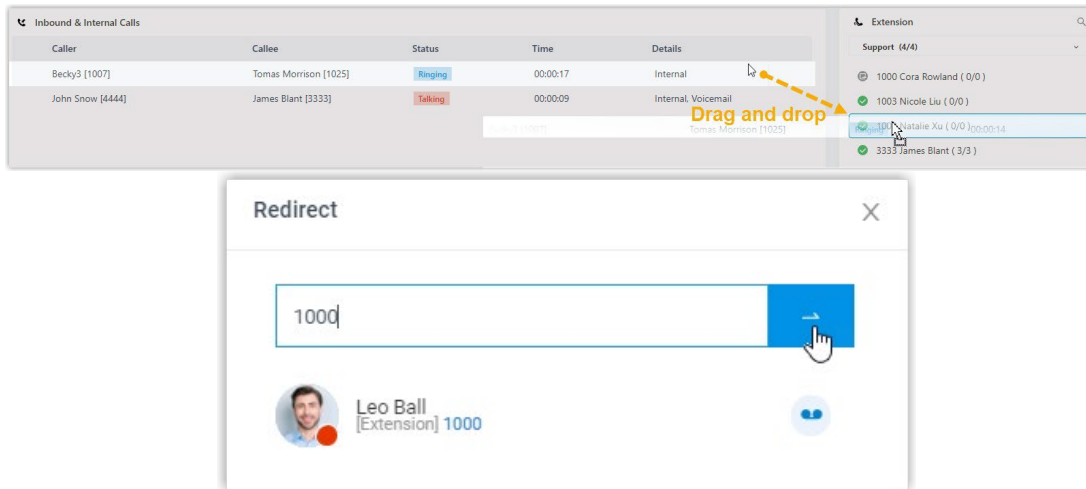
> **ⓘ Tip:**
> You can also click the extension user from the matching results to redirect the call.

Redirect an incoming call to ring group

1. On the Inbound & Internal Calls panel, hover your mouse over a call that is in Ringing status.
2. Drag the call and drop it on a desired ring group displayed in Ring Group list. The ring group members will receive an incoming call.

Redirect an incoming call to a queue

1. On the Inbound & Internal Calls panel, hover your mouse over a call that is in Ringing status.
2. Drag the call and drop it on a desired queue displayed in Queue list. The agents will receive an incoming call.

Redirect an incoming call to a group voicemail

1. On the Inbound & Internal Calls panel, hover your mouse over a call that is in Ringing status.
2. Drag the call and drop it on a desired group voicemail displayed in Group list.
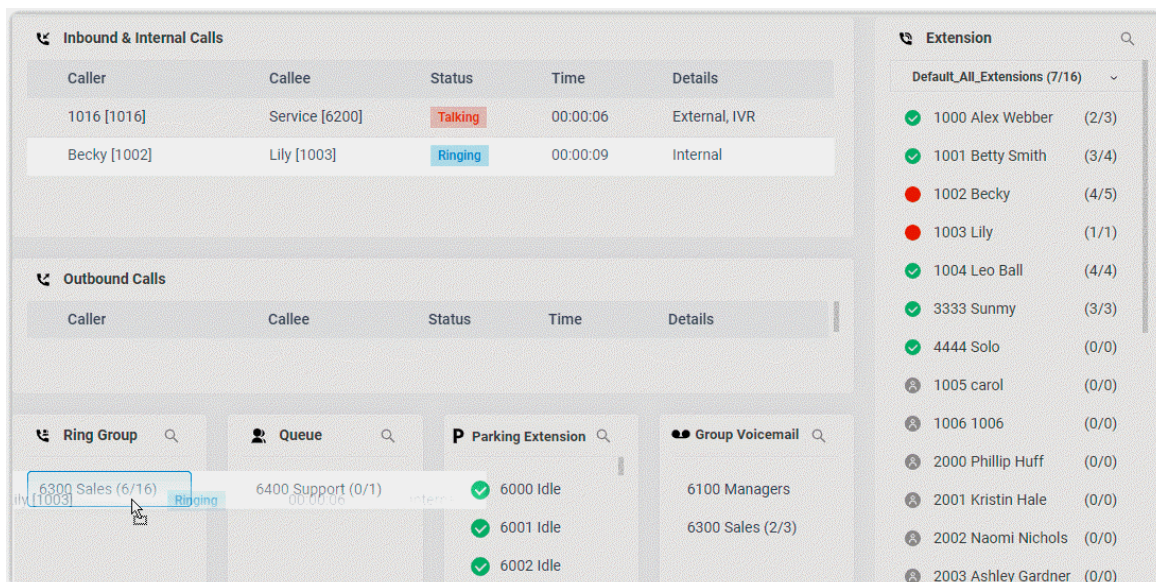   The call is redirected to the group voicemail and the caller can leave a message to the extension user.
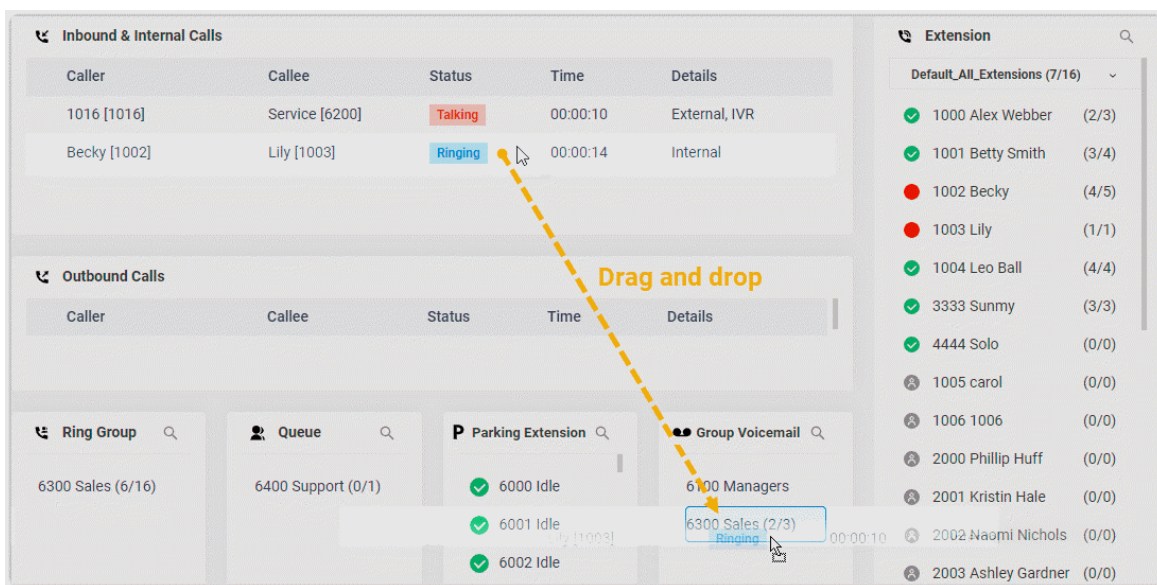
Redirect an incoming call to an extension's voicemail

1. On the Inbound & Internal Calls panel, hover your mouse over a call that is in Ringing status.
2. Right click the incoming call, and select Redirect.
3. On the pop-up panel, enter an extension number to search the extension user.
4. From the matching results, click 👀 to redirect the call.
   The call is redirected to the extension's voicemail and the caller can leave a message to the extension user.
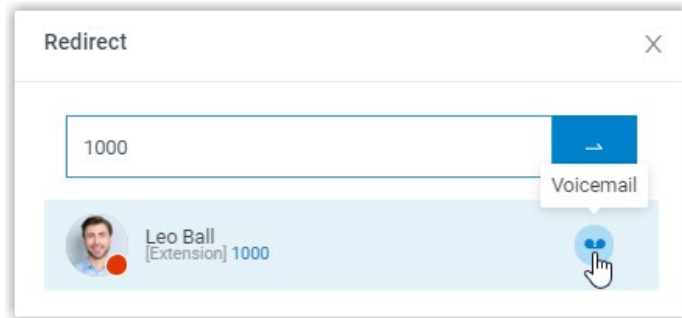
Transfer a Call

This topic describes how to transfer a call.

Prerequisites
To transfer extension group members' active calls, Call distribution management (Redirect, Transfer, Drag and Drop operation) permission is required.

Transfer a call to an extension

1. On the Inbound & Internal Calls panel or Outbound Calls panel, hover your mouse over an active call.
2. Transfer the call to an extension user in one of the following methods:
   - Drag the call and drop it on a desired extension displayed in Extension list. The extension user will receive an incoming call.
   - Right click the call, click Transfer, and select a transferred party.
     On the pop-up panel, enter a receptionist extension number, and click ⊡. The extension user will receive an incoming call.

     > 🛈 Tip:
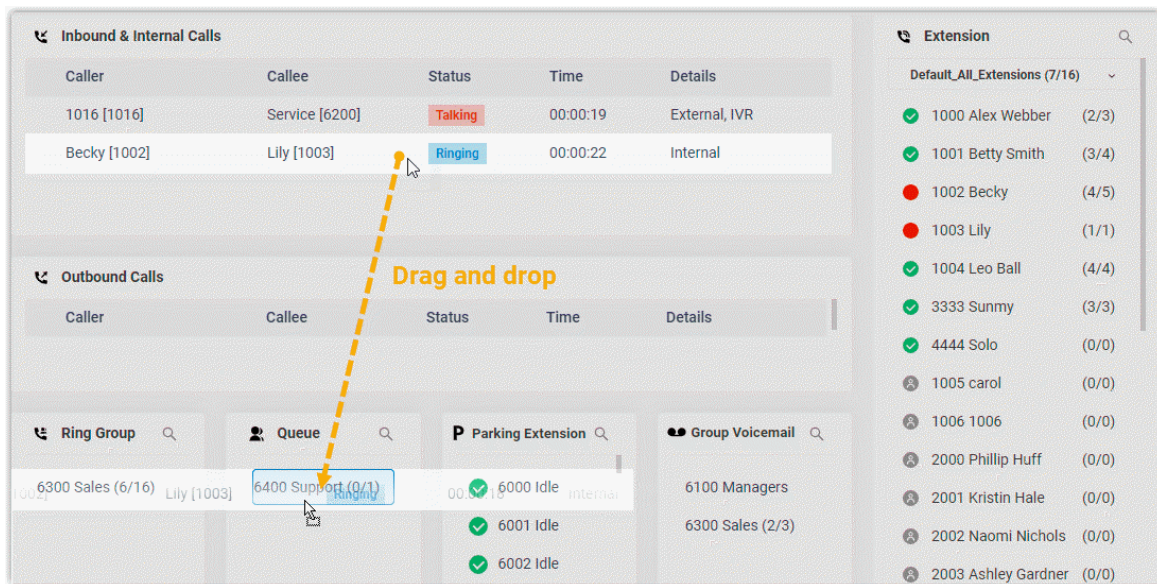   > You can also click the extension user from the matching results to transfer the call.
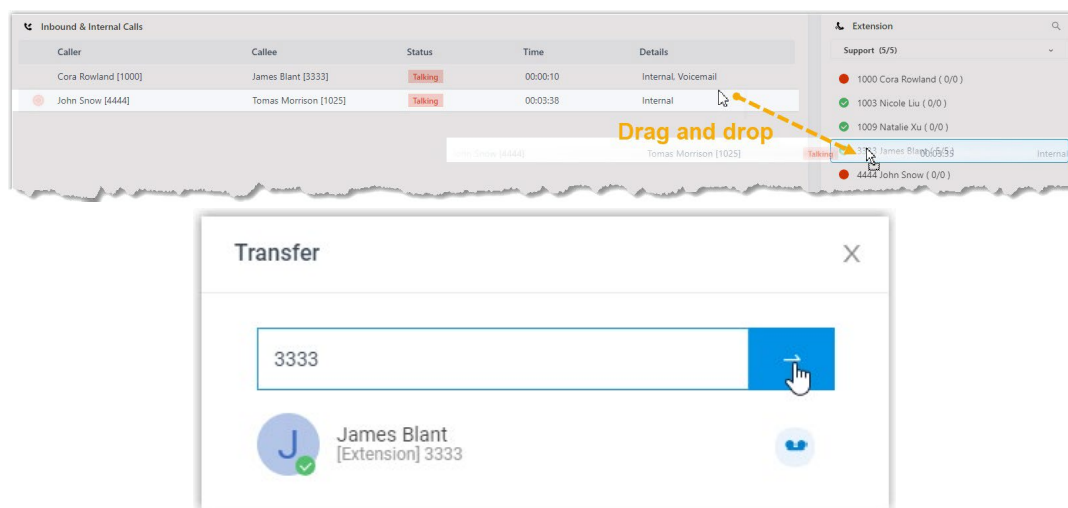
Transfer a call to a group voicemail

1. On the Inbound & Internal Calls panel or Outbound Calls panel, hover your mouse over an active call.
2. Drag the call and drop it on a desired group voicemail displayed in Group list.
   The call is transferred to the group voicemail and the caller can leave a message to the group members.
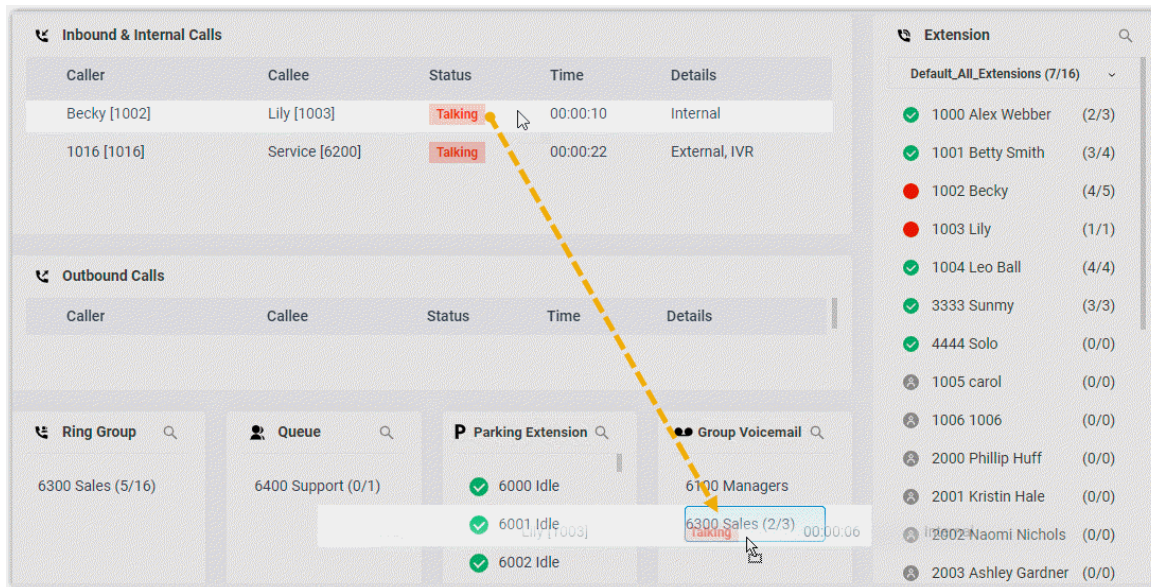
Transfer a call to extension's voicemail

1. On the Inbound & Internal Calls panel or Outbound Calls panel, hover your mouse over an active call.
2. Right click the incoming call, and select Transfer.
3. On the pop-up panel, enter an extension number to search the extension user.
4. From the matching results, click 👓 to transfer the call.
   The call is transferred to the extension's voicemail and the caller can leave a message to the extension user.
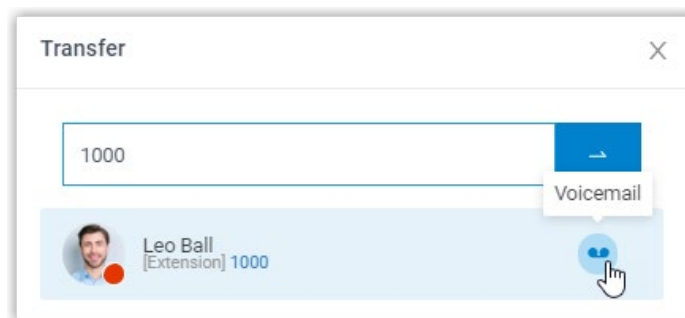
Monitor a Call

Call monitoring is the process of monitoring conversations between employees and customers for improving communication and customer service. This topic describes how to monitor a call.

Scenario
Call monitoring is a way to manage call quality, increase efficiency, improve performance, and develop sales or marketing strategies.
You can monitor your group members' conversations in the following ways:

- Call listening: Listen to the active call between the group member and customer to ensure that quality standards are met, without the group member or customer knowing.
- Call barging: Join the call to speak with both the group member and customer, provide immediate assistance, and improve customer satisfaction.
- Call whispering: Talk to the group member, and give assistance to your group member during an active call, without the customer hearing the discussion.

Prerequisites
To monitor your extension group members' calls, Call monitoring operations (Listen, Whisper, Barge In) permission is required.

Procedure

1. On the Inbound & Internal Calls panel or Outbound Calls panel, hover your mouse over an active call.
2. Right click the call, and select a monitor mode: Barge In, Listen, or Whisper. The system will place a call to your extension.
3. Answer the call.
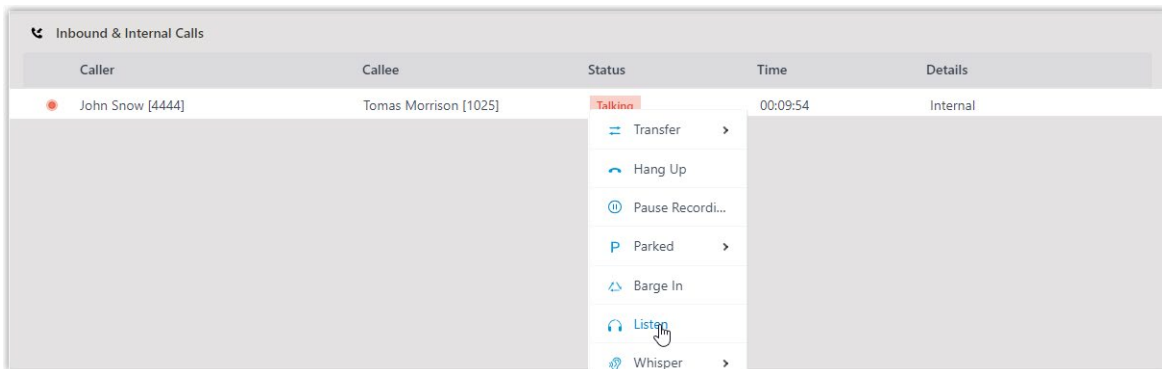
Park and Retrieve a Call

Call parking is a method of holding a call on a phone, so that anyone can retrieve the call on another phone. This topic describes how to park a call and retrieve a parked call.

Prerequisites
To park extension group members' active calls, Call parking operations (Park, Retrieve) permission is required.

Park a call

1. On the Inbound & Internal Calls or Outbound Calls panel, hover your mouse over an active call.
2. Park the call on an automatically assigned parking number or a specific parking number.
   Method 1. Park a call on an automatically assigned parking number
   a. Right click the call, and select Parked.
   b. Select the parked party.
      The call is parked on an available parking number. The system puts the parked party's call on hold, and plays a prompt to tell the other party where to retrieve the call.
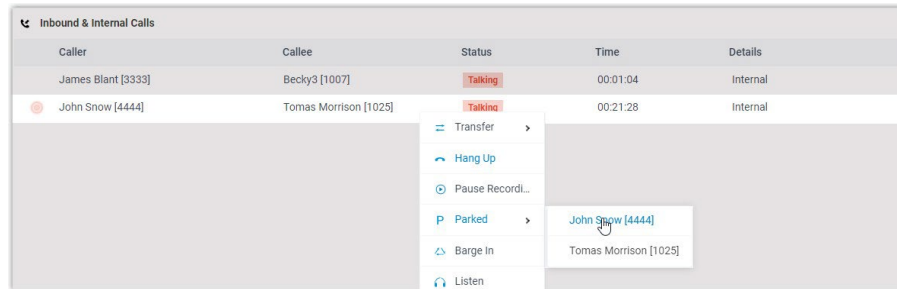
Method 2. Park a call on a specific parking number
Drag the call and drop it on a desired parking number in the Parking Extension list.
The call is parked on the specified parking number. The system puts the parked party's call on hold, and plays a prompt to tell the other party where to retrieve the call.
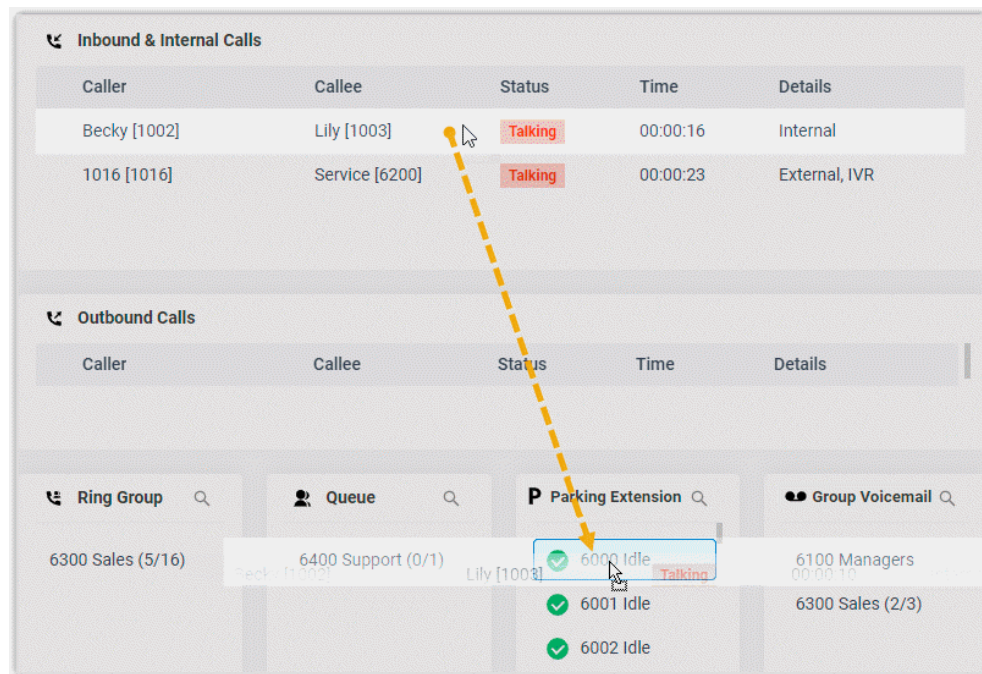
> 📝 Note:
> After you park the outbound call, the call disappears from Outbound Calls panel, and displays on the Inbound & Internal Calls panel.

Retrieve a parked call

1. On the Inbound & Internal Calls panel or Parking Extension list, hover your mouse over a parked call.
2. Right click the call, and select Retrieve.
   The system routes the parked call to your extension.
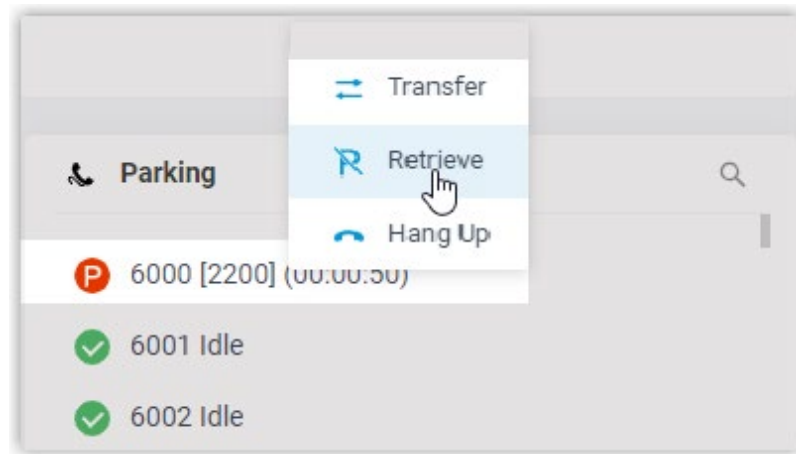
3. Answer the call to retrieve the parked call.

Switch Call Recording Status

If administrator has enabled call recording for specific extensions, trunks, conferences, or queues, the specified calls would be recorded as soon as they are established. Being granted with specific recording operation permissions, you can pause the call recording to avoid sensitive information being recorded. Moreover, you can start recording a call when necessary, even if it is not a call specified to be recorded by administrator.

Prerequisites

• To switch call recording status for yourself, make sure that the Pause/Resume permission or Start/Pause/Resume permission is assigned to your extension.

> 📝 Note:
> ◦ Pause/Resume permission allows you to pause or resume the recording during a call that is specified to be recorded.
> ◦ Start/Pause/Resume permission allows you to start, pause, or resume the recording during any calls (except conference calls), be the calls specified to be recorded or not.

• To switch call recording status for your group members, Switch extensions' recording status permission is required.

Procedure

1. On the Inbound & Internal Calls or Outbound Calls panel, hover your mouse over an active call.
2. To pause recording, right click the call, and click Pause Recording.

   The recording icon stops flashing, and changes to ⏸ .

3. To start or resume recording, right click the call, and click Recording.

   The recording icon is changed to ⏺ and flashing.

Hang up a Call

This topic describes how to hang up your call or your group members' calls.

Scenario
In a conference call, you can kick your group member out of the conference by hanging up his or her call.

Prerequisites
To hang up extension group members' active calls, Pick up or hang up other extensions' calls permission is required.

Procedure
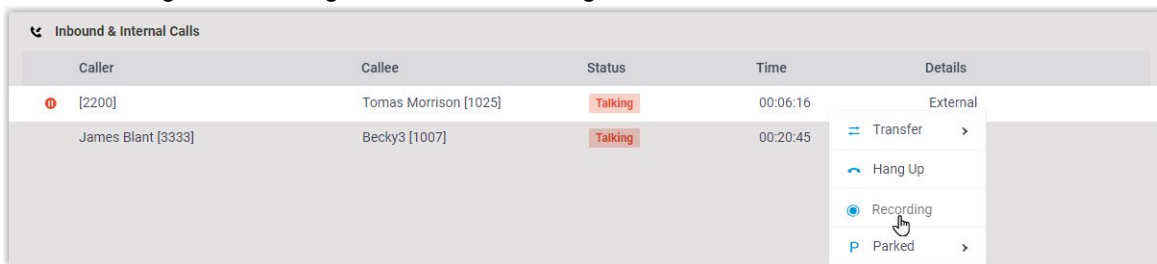
1. On the Inbound & Internal Calls or Outbound Calls panel, hover your mouse over an active call.
2. Right click the call, and select Hang Up.
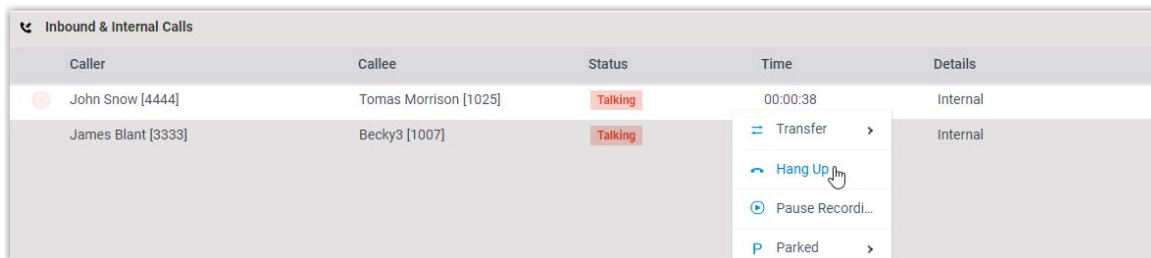
3. In the pop-up dialog box, click OK. The system ends the call.

Place a Call to a Group Member

ESI eMobile Web Client allows you to place calls to any contacts. This topic describes how to place a call to a group member quickly on Operator Panel.

Procedure

1. On the Extension panel, hover your mouse over a desired group member.
2. Double-click the group member.
   A call window pops up that allows you to manage the call.

Voicemail Management

Leave a voicemail message

You can leave a message to an extension user, or leave a message to group voicemail.

Leave a voicemail message to an extension user

1. On the Extension panel, hover your mouse over a desired extension user.
2. Right click the extension user, select Leave a Voicemail.
   A call window pops up that allows you to record your voice message.
3. When done, hang up the call.

Leave a voicemail message to a voicemail group

1. On the Group Voicemail panel, hover your mouse over a desired group voicemail.
2. Right click the extension user, select Leave a Voicemail.
   A call window pops up that allows you to record your voice message.
3. When done, hang up the call.

Presence Management
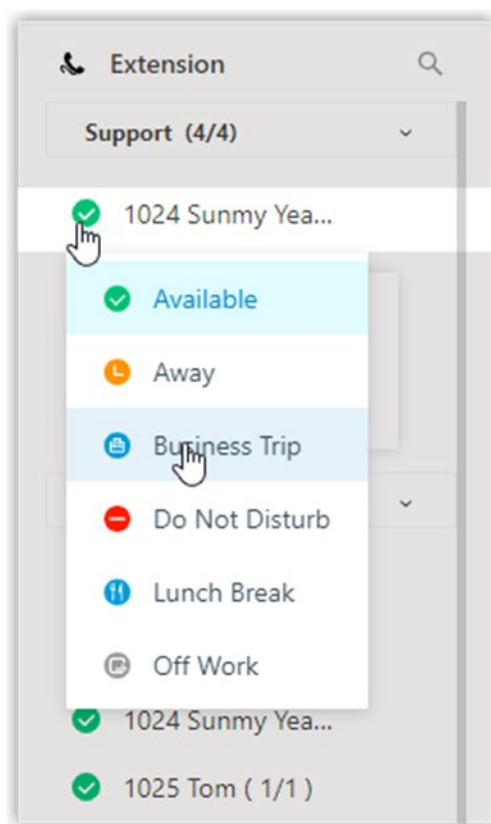
Switch Group Members' Presences

When your group member or you are unavailable to take a call, you can switch the presence for your group member or yourself. This topic describes how to switch the presence status of your group member and yourself.

Prerequisites
To switch members' presence status, Switch group members' presence permission is required.

Procedure

1. On the Extension panel, hover your mouse over the extension.
2. Click the presence status icon.
3. On the pop-up list, select a status.

Result
Calls to this extension group member will be forwarded to a specific destination based on the presence.

Office Time Management

Switch Business Hours and Holidays

Business Hours and Holidays determines how a call is handled. The system routes a call to different destinations based on the business hours and holidays. This topic describes how to switch the phone system to work on business hours, outside business hours, and holiday.

Background information
The system displays the current period according to the Business Hours and Holiday set by the administrator. There are three periods:

- Business Hours is the working hours during which you conduct business.
- Outside Business Hours is the time periods of the working days during which the employees are not working.
- Holiday is the days set aside by custom or by law on which normal activities are suspended or reduced.

Scenario

- When an emergency occurs on a normal working day, you can switch the phone system to work from business hours to outside business hours, the system routes the call to the destination that is defined by your system administrator.
- If your business provides specific services on holidays, you can switch the phone system to work from holiday to business hours to offer specific business.

Prerequisites

- Switch Business Hours and Holidays status permission is required.
- Your system administrator has defined business hours and holidays.

Procedure

1. In the upper left corner of operator panel, click ⇆.
   The system prompts you whether to switch the time.
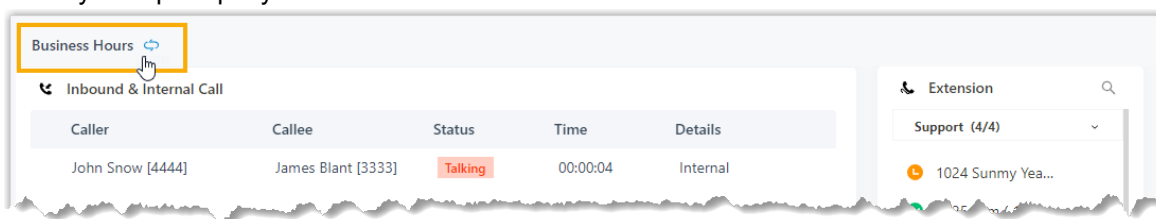
2. In the pop-up dialog box, click Yes.

> ℹ️ Tip:
>
> - If you are ready to work, you can switch outside business hours to business hours, or the system can automatically switch the time schedule according to the business hours of the next working day.