ESI eSIP Evolution Series™ e-Series Server

Call Center Console User's Guide

This guide is intended for call center managers (supervisors) and agents who need to monitor call center performance and manage queue calls. This user's guide provides step-by-step procedures and reference information for using the web-based Call Center Console.

Contents

About This Guide

This user's guide provides step-by-step procedures and reference information for using Call Center Console.

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

Audience
This guide is intended for call center managers (supervisors) and agents who need to monitor call center performance and manage queue calls.

Call Center Console Overview

Call Center Console is an additional service that allows queue manager and agents to monitor queue performance and call activity, and manage queue calls. This topic describes the Call Center Console components.

Prerequisites
Call Center Console is only available for ESI eSIP E-Series Enterprise Plan and Ultimate Plan.

Call Center Console components
Call Center Console is a web-based utility integrated with eMobile Web Client, including Wallboard and Queue Panel.

- Wallboard: A Wallboard is a reporting tool that displays call center metrics and KPIs to allow managers and agents to monitor and optimize performance.
- Queue Panel: Show the call metrics and agents' performance in real time, and offer a comprehensive view on activity of call. It is available to manager and agents to manage queue calls.

Wallboard

Wallboard Overview

The Wallboard allows you to easily view real-time information related to queues. This topic describes what you can do on Wallboard and the call metrics displayed on the Wallboard.

Call Center Console components

Call Center Console is a web-based utility integrated with eMobile Web Client, including **Wallboard** and **Queue Panel**.

- **Wallboard**: A Wallboard is a reporting tool that displays call center metrics and KPIs to allow managers and agents to monitor and optimize performance.
- **Queue Panel**: Show the call metrics and agents' performance in real time, and offer a comprehensive view on activity of call. It is available to manager and agents to manage queue calls.

Prerequisites

Wallboard is only available for call center manager.

What you can do on Wallboard

As a queue manager, you can quickly access all the important information about your queues in real time on Wallboard. ESI Wallboard drills down into your queue's daily, weekly, or monthly performance, providing an insight into call volumes, response rates, and service level.

You can display call metrics for each queue independently as needed. With a Wallboard displayed on a TV or a dedicated "wallboard", queue agents should be able to understand their performance at a glance. In this way, agents are continuously up to date with service level agreements and daily targets, which increases efficiency and workload output.
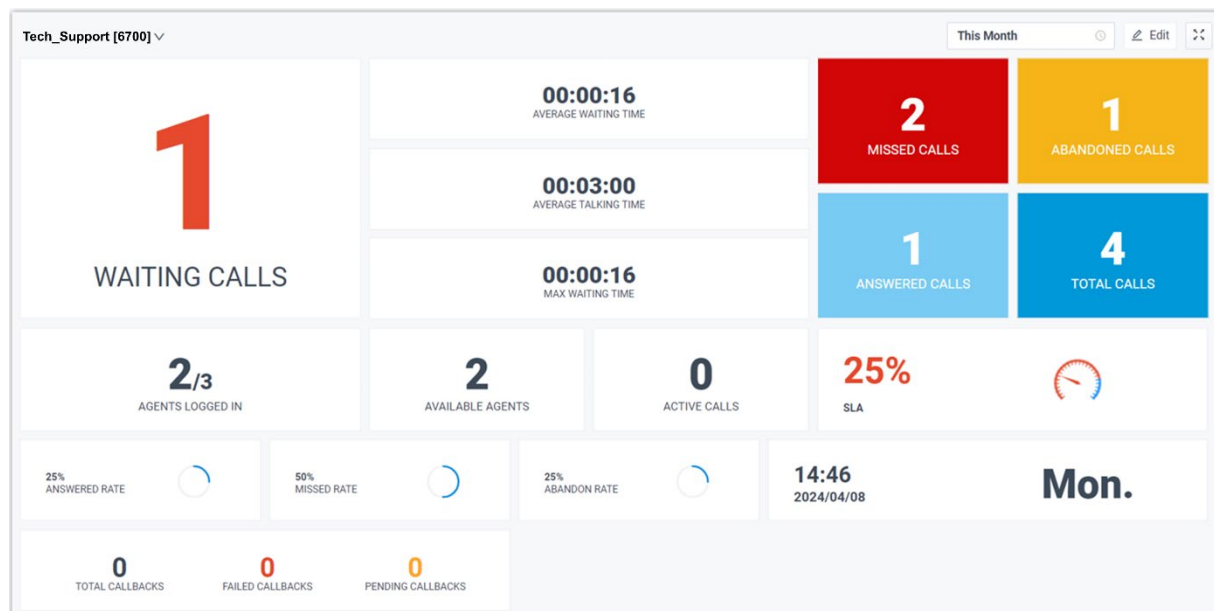
Queue call metrics

Queue call metrics displayed on Wallboard are customizable. The following table lists the available metrics widgets on the Wallboard.

Widget	Description
Date & Time	Display the date and time of the PBX.
Agents logged in	Display the number of agents logged in to the queue, and the total number of agents. **Note:** This widget is available only when the Wallboard displays the call statistics of a single queue.
Active calls	Display the number of current active calls in the queue.
Available agents	Display the number of agents logged in the queue that are ready to take a call. **Note:** This widget is available only when the Wallboard displays the call statistics of a single queue.
Waiting calls	Display the number of waiting calls in the queue.
Average waiting time	Display the average call waiting time for queue calls answered over a period of time.
Average talking time	Display the average amount of time that an agent spends talking to a customer.
SLA	Display the Service Level Agreement (SLA) for the queue. **Note:** This widget is available only when the Wallboard displays the call statistics of a single queue.
Total calls	Display the total calls that queue received over a period of time.
Answered calls	Display the total calls that queue answered over a period of time.
Missed calls	Display the total calls that queue missed over a period of time.
Abandoned calls	Display the total calls that has been abandoned over a period of time.
Answered rate	Display the answered rate over a period of time for all calls to the queue.
Missed rate	Display the missed rate over a period of time for all calls to the queue.
Abandon rate	Display the abandon rate over a period of time for all calls to the queue.
Max waiting time	Display the maximum call waiting time for all calls answered over a period of time.
Callbacks	Display the following data of queue callback over a period of time: • **Total callbacks**: Display the total callback requests that are successfully made by callers over a period of time. • **Failed callbacks**: Display the total failed callback attempts over a period of time. • **Pending callbacks**: Display the total callbacks to be performed.

View Call Metrics on Wallboard

As a manager of a queue or multiple queues, you can view the queue call statistics to measure the queue performance. This topic describes how to view queue call statistics.

Prerequisites

- You are a queue manager.
- You have the permission to access eMobile Web Client, and get username and password from your system administrator.

Step 1. Access Wallboard from eMobile Web Client

1. Log in to eMobile Web Client.

> ℹ️ **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**: Extension number or email address.
      - **Password**: Extension User Password.

2. Go to Call Center Console > Wallboard.

Step 2. Filter queue call statistics

If you manage multiple queues, you can choose to view call statistics for all queues or for a single queue.

- [View call statistics for all queues](#)
- [View call statistics for a single queue](#)

View call statistics for all queues

1. At the top-left corner of Wallboard, select **All**.
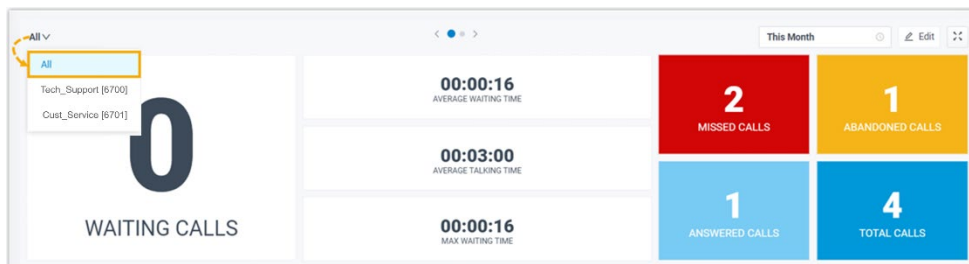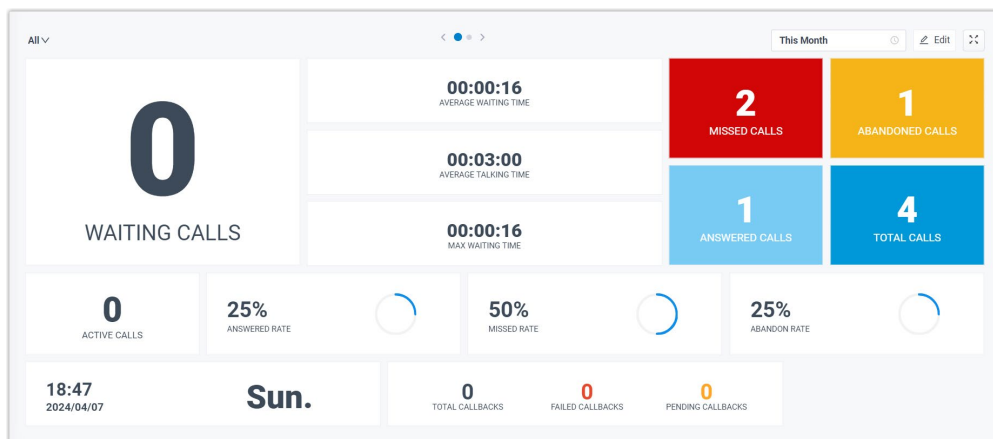

2. At the top-right corner of Wallboard, select a time range.
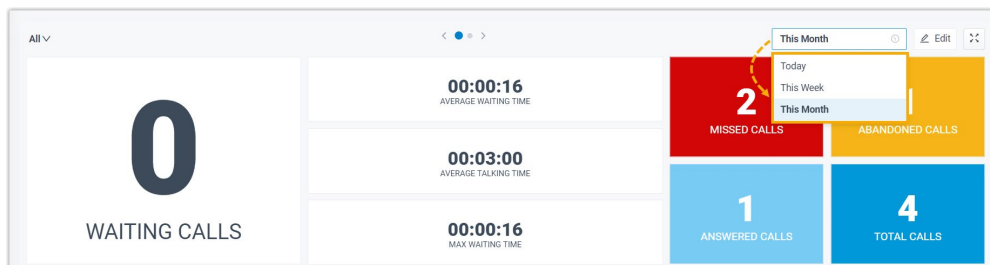
   - **Today**: View statistics of today.
   - **This Week**: View statistics of this week.
   - **This Month**: View statistics of this month.

The call statistics for all queues within the specified time range are displayed.

>
>
> **Tip:**
>
> For **MISSED CALLS** and **ABANDONED CALLS**, you can click on the widgets to view the related queue call logs and manage processing status of these call logs. Any other agents who are authorized to view the queue's call logs can see the changes you make on their eMobile clients.
>
>

3. **Optional:** On the top of Wallboard, click the toggle button to switch to the tabular view that displays the detailed information about call metrics for each call queue.

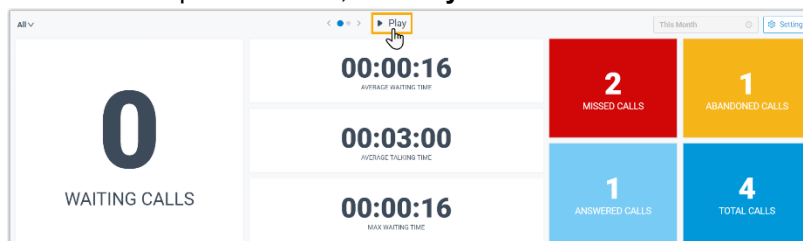4. **Optional:** Set the Wallboard to display independently in a separate browser window.

a. At the top-right corner of Wallboard, click ⤢ .
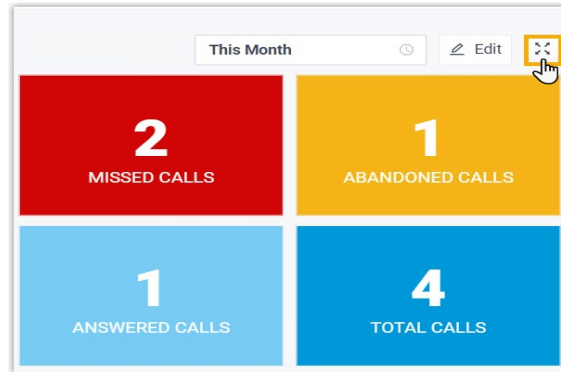
b. **Optional:** Set the Wallboard to automatically toggle between summary view and tabular view with a scrolling display.

    i. At the top-right corner of Wallboard, click **Settings** to set the time to toggle, then save the setting.
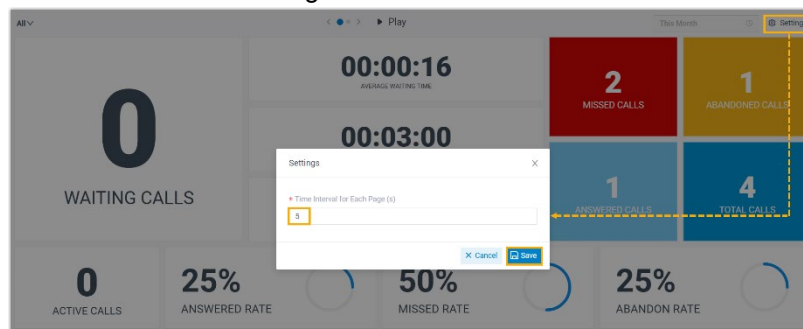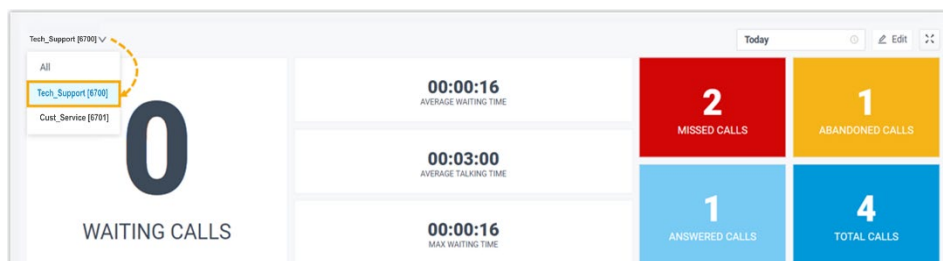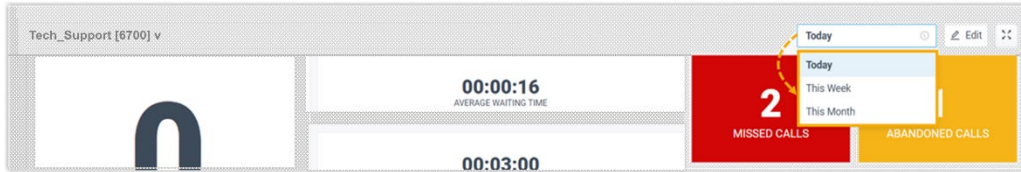

    ii. On the top of Wallboard, click **Play**.

The Wallboard automatically toggles between summary view and tabular view with a scrolling display at the specified time interval.

View call statistics for a single queue

1. At the top-left corner of Wallboard, select a desired queue from the dropdown list.

2. At the top-right corner of Wallboard, select a time range.

- **Today**: View statistics of today.
- **This Week**: View statistics of this week.
- **This Month**: View statistics of this month.

The call statistics for the selected queue within the specified time range are displayed.

3. **Optional:** Click [⛶] to display the Wallboard of each queue independently in a separate browser window.
   For example, display the Wallboard of Service department in a browser window, and show the wallboard to Service agents; display the Wallboard of Sales department in another browser window, and shows the wallboard to Sales agents.

Manage Wallboard Widgets

Widgets displayed on Wallboard are customizable. You can place a widget in a way that is easy to see. This topic describes how to add, resize, lock, delete, reset, and add a note to a widget.
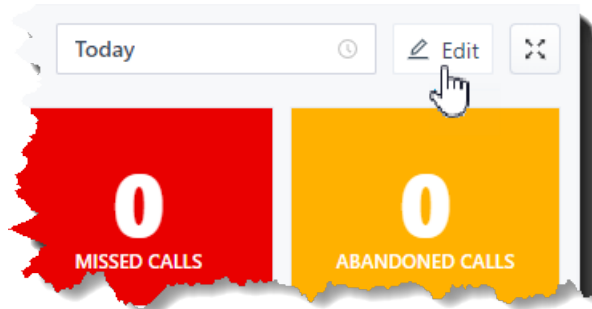
Add a widget

1. At the top-left corner of the Wallboard, select **All** or select a specific queue.
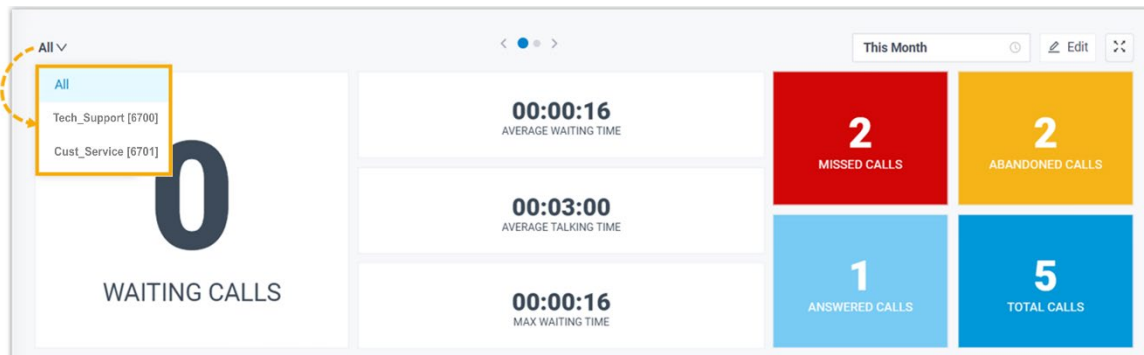
> **Note:**
> - If you select **All**, the changes you make to Wallboard widgets will be applied to the current view only.
> - If you select a specific queue, the changes you make to Wallboard widgets will be applied to the view for all the single queue.
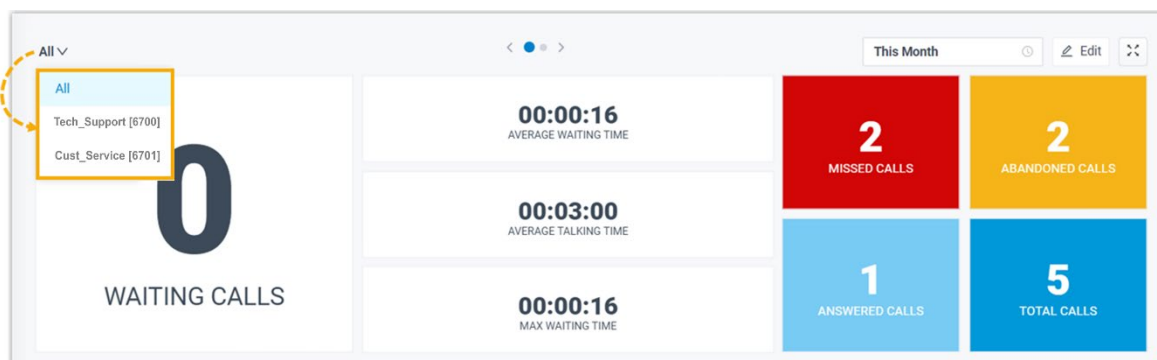
2. At the top-right corner of the Wallboard, click **Edit**.

3. Click **Add Widget**.
4. In the **Type** drop-down list, select a statistic type.
5. In the **Note** field, enter the short description according to your needs.
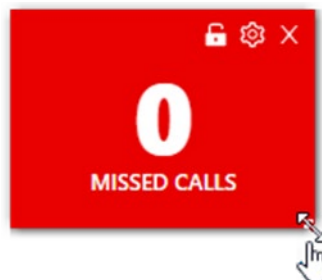6. Click **Save**.

Resize a widget

1. At the top-left corner of the Wallboard, select **All** or select a specific queue.

> ✎ **Note:**
> - If you select **All**, the changes you make to Wallboard widgets will be applied to the current view only.
> - If you select a specific queue, the changes you make to Wallboard widgets will be applied to the view for all the single queue.

2. At the top right corner of the Wallboard, click **Edit**.
3. Hover your mouse over the lower right corner of the widget.
4. Hold the widget and then drag the border frame around it up/down and left/right to resize it.

5. Click **Save**.

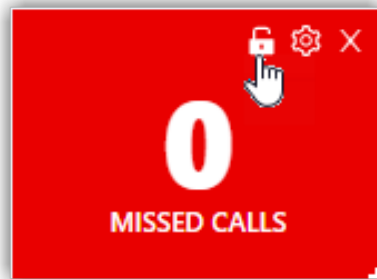## Move and lock a widget on a fixed position

1. At the top-left corner of the Wallboard, select **All** or select a specific queue.

> ✎ **Note:**
>> • If you select **All**, the changes you make to Wallboard widgets will be applied to the current view only.
>> • If you select a specific queue, the changes you make to Wallboard widgets will be applied to the view for all the single queue.

2. At the top right corner of the Wallboard, click **Edit**.
3. Move the widget to a desired position.
4. Click ⬜ on the desired widget.
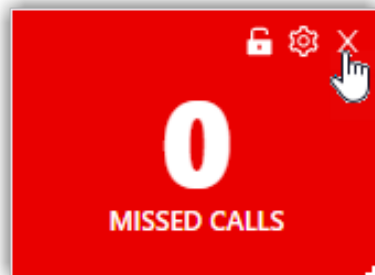

5. Click **Save**.

Delete a widget

1. At the top-left corner of the Wallboard, select **All** or select a specific queue.

> ✎ **Note:**
>> • If you select **All**, the changes you make to Wallboard widgets will be applied to the current view only.
>> • If you select a specific queue, the changes you make to Wallboard widgets will be applied to the view for all the single queue.

2. At the top right corner of the Wallboard, click **Edit**.
3. Click ✕ on the desired widget.

4. Click **Save**.
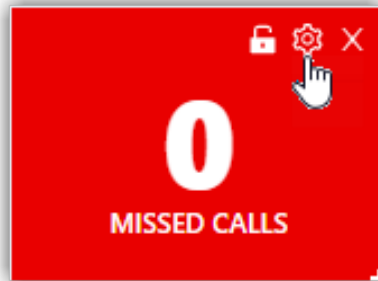
Add a note to the bottom of the widget

1. At the top-left corner of the Wallboard, select **All** or select a specific queue.

> 📝 **Note:**
> - If you select **All**, the changes you make to Wallboard widgets will be applied to the current view only.
> - If you select a specific queue, the changes you make to Wallboard widgets will be applied to the view for all the single queue.

2. At the top right corner of the Wallboard, click **Edit**.
3. Click ⚙ on the desired widget.

4. In the **Note** field, enter the short description according to your needs.
5. Click **Save**.

Reset widgets

Reset widgets to the default settings and discard changes you have made.

1. At the top-left corner of the Wallboard, select **All** or select a specific queue.

> 📝 **Note:**
> - If you select **All**, the changes you make to Wallboard widgets will be applied to the current view only.
> - If you select a specific queue, the changes you make to Wallboard widgets will be applied to the view for all the single queue.

2. At the top right corner of the Wallboard, click **Edit**.
3. Click **Reset** and **Save**.

The custom position, note, and size of the widgets will be reset to back to the default settings.
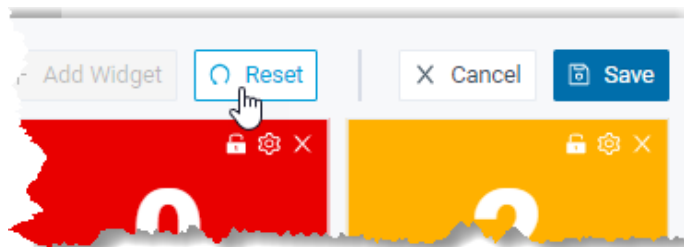
Queue Panel

Queue Panel Overview

This topic describes what you can do on Queue Panel, and the permissions of queue manager and agents.

What you can do on Queue Panel

With an easy-to-use interface on ESI Queue Panel, you can view call statistics, change agent status, manage queue calls quickly and efficiently, and manage processing status of missed or abandoned queue calls.

- View call statistics of each queue and each agent.
- Change agent status in the queue, including login, logout, pause, and unpause.
- Manage queue calls:
  ◦ **Call distribution**: Redirect incoming calls, and transfer calls.
  ◦ **Call connection**: Pick up ringing calls, and hang up calls.
  ◦ **Call parking**: Park calls.
  ◦ **Call recording**: Monitor and switch recording status.
  ◦ **Call monitoring**: Barge in a call, listen to a call, and whisper to a call.
- Manage processing status of missed or abandoned queue calls, including not deal, dealing, and dealt.

Queue Panel permissions

What you can do on Queue Panel depends on the following permission. The permission is assigned by your system administrator.

Permission	Queue manager	Agents
Switch agents' Status	√	×
Call distribution management (Redirect, Transfer, Drag and Drop operation)	√	√
Allow for picking up or hanging up agents' calls	√	√
Call monitoring operations (Listen, Whisper, Barge In)	√	×
Call parking operation	√	√
Switch agent's recording status	√	×

Getting Started

Access Queue Panel

This topic describes how to access Queue Panel.

Procedure

1. Log in to eMobile Web Client.

   > ℹ️ **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.
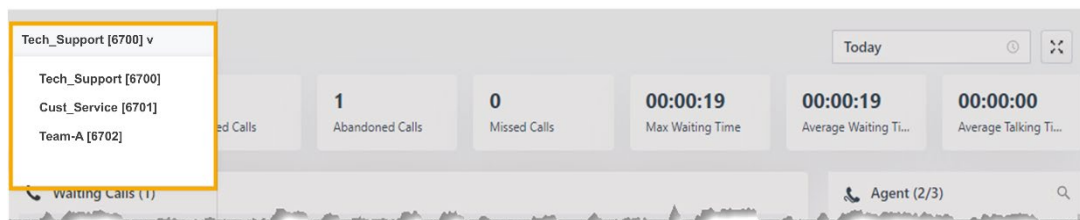2. Go to Call Center Console > Queue Panel.

Queue Panel Layout

This topic describes the Queue Panel layout, including call statistics panel, waiting call panel, active call panel, and agent panel.
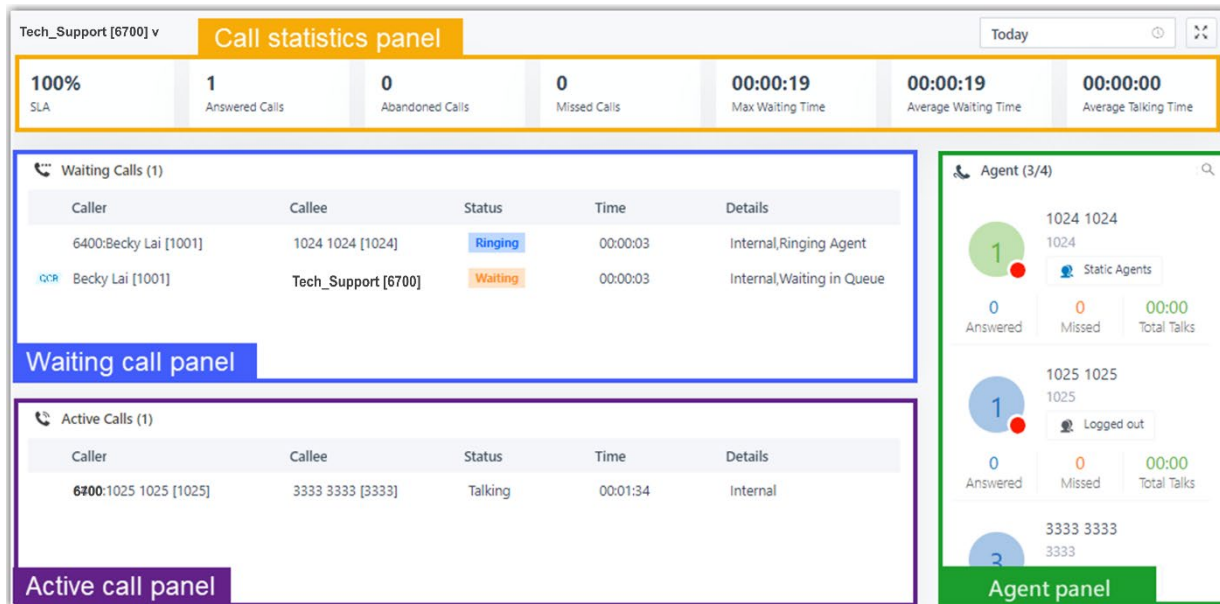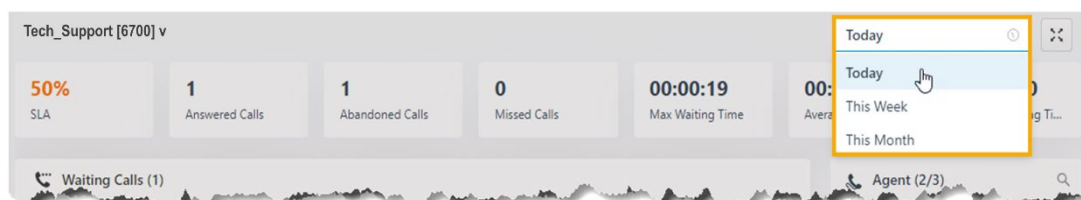

Menu bar

1. If you have multiple queues, select a desired queue from the upper left corner of queue panel.


2. Select a time range.
   - **Today**: View statistics of today.
   - **This Week**: View statistics of this week.
   - **This Month**: View statistics of this month.

3. **Optional:** Click [⋈] to display queue panel in a separate browser window.
   For example, display the queue panel of Service in a browser window; display the queue panel of Sales in another browser window.

Call statistics panel

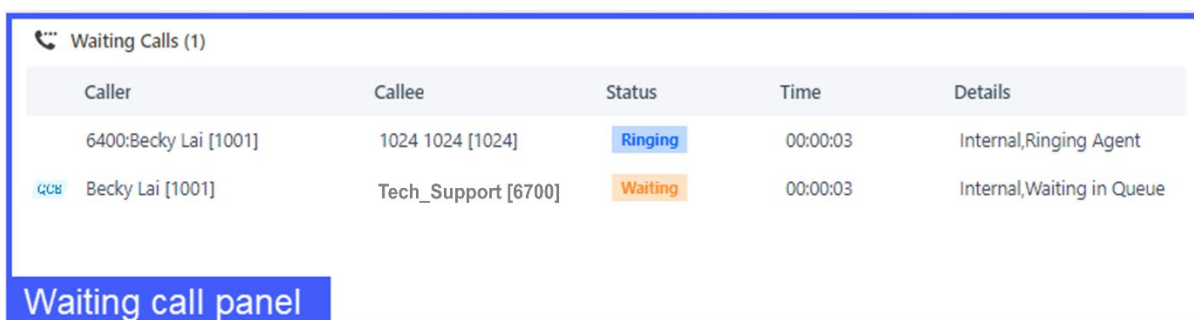Display call statistics of a queue.
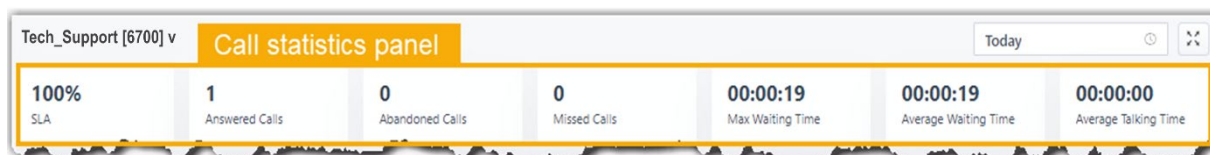
Call statistics	Description
SLA	Display the Service Level Agreement over a period of time for the queue.
Answered calls	Display the total calls that queue agents answered over a period of time.
Abandoned Calls	Display the total calls that have been abandoned over a period of time. ℹ️ **Tip:** You can click on the widget to view detailed information about related call logs and manage the processing status.
Missed Calls	Display the total calls that queue missed over a period of time. ℹ️ **Tip:** You can click on the widget to view detailed information about related call logs and manage the processing status.
Max Waiting Time	Display the maximum call waiting time for all calls answered over a period of time.
Average Waiting Time	Display the average waiting time over a period of time for all queue calls.
Average Talking Time	Display the average talking time over a period of time for all queue calls.

Waiting call panel

Display the details of incoming call that is in ringing or waiting state in real time, including caller, callee, status, time, and details.

> 📝 **Note**: The QCB indicates that the caller has requested a callback.

Active call panel

Display details of answered calls in real time, including caller, callee, status, time, and details.

> ✏️ **Note**: The QCB indicates that this is a callback.

Agent panel

Display agent details in the queue, including the agent's presence, queue status, and personal call statistics.

Active call panel

Agent panel

Agent's presence

Hover your mouse over the presence icon, you can see the agent's presence status.

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

Queue Status

| Icon	Presence
	The agent has logged in to the queue, and is available to receive a call.
	The agent logged out of the queue.
	The agent has paused receiving the queue calls.

Manage Agent Status

Manage Your Status in Queues

As an agent of a queue or multiple queues, you can change your own status in a specific queue or in all queues. This topic describes how to log in to queues, log out of queues, pause queue calls, and unpause queue calls.

Log in to queues

Prerequisites

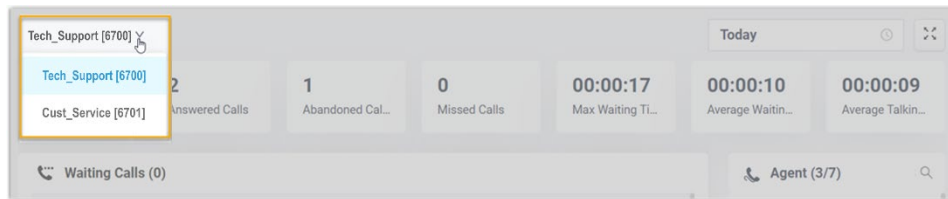This operation is only available for dynamic agents.
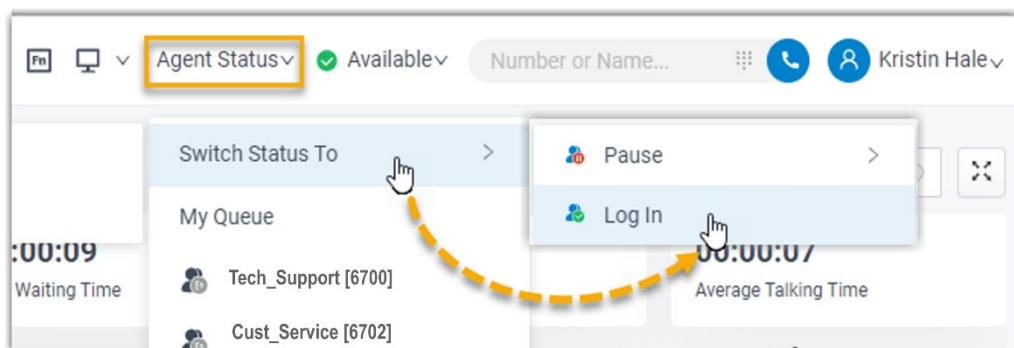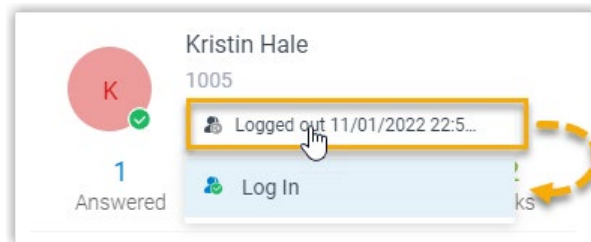

Log in to all queues

1. In the top navigation bar of eMobile Web Client, click **Agent Status**.
2. Hover your mouse over **Switch Status To**.
3. Click **Log In**.

Log in to a specific queue

1. In the eMobile Web Client, go to **Queue Panel**.
2. In the top-left corner of the Queue Panel, select a desired queue.

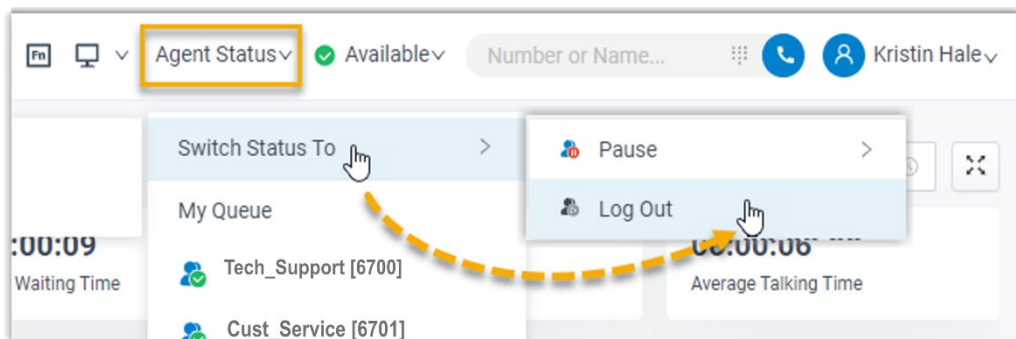3. On the **Agent** panel, hover your mouse over your extension and change the status.

  a. Click the agent status.
  b. Click **Log in**.

Log out of queues

Prerequisites

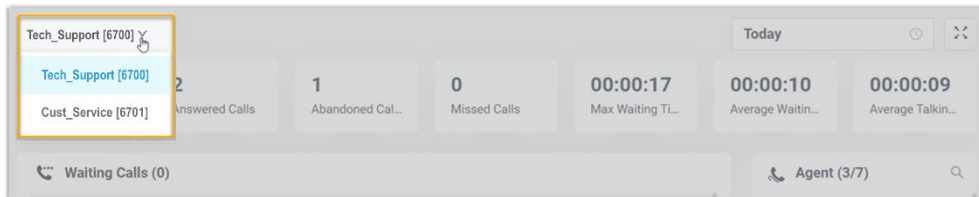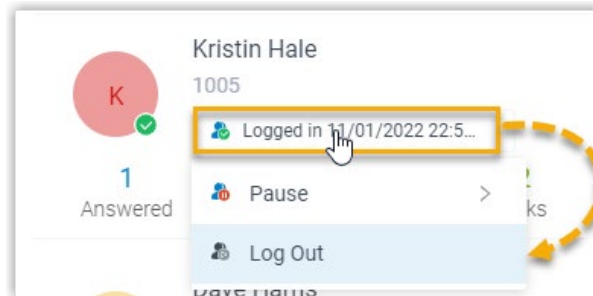This operation is only available for dynamic agents.

Log out of all queues

1. In the top navigation bar of eMobile Web Client, click **Agent Status**.
2. Hover your mouse over **Switch Status To**.
3. Click **Log Out**.

Log out of a specific queue

1. In the eMobile Web Client, go to **Queue Panel**.
2. In the top-left corner of the Queue Panel, select a desired queue.

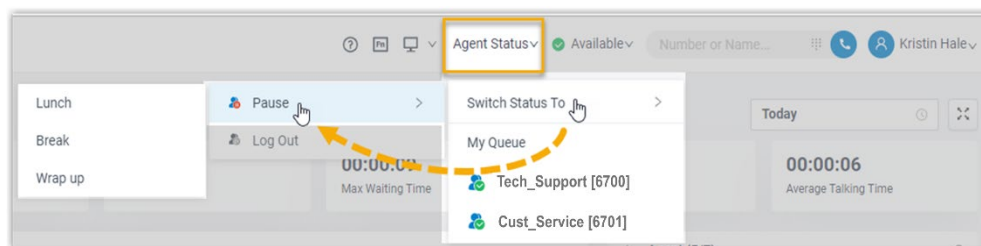3. On the **Agent** panel, hover your mouse over your extension and change the status.

      a.   Click the agent status.

      b.   Click **Log Out**.

Pause queue calls

As a static agent or dynamic agent, you can pause the queue calls when you are away from desk. The queue will not distribute calls to you after you pause queue calls.
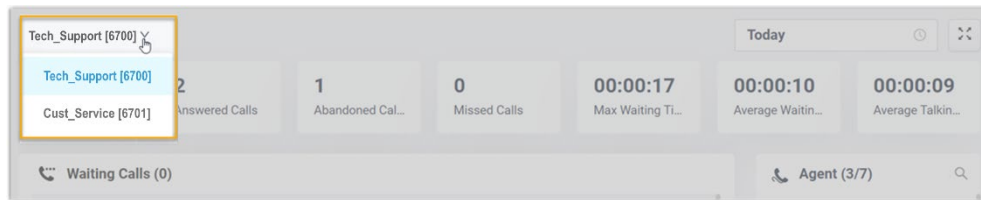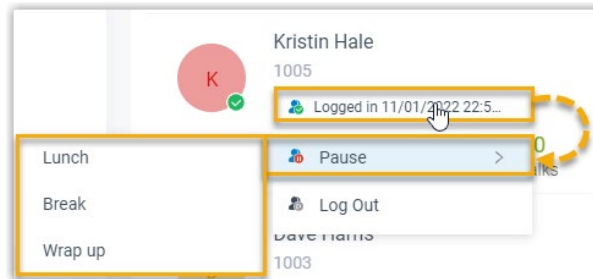
Pause calls of all queues

1. In the top navigation bar of eMobile Web Client, click **Agent Status**.
2. Hover your mouse over **Switch Status To**.
3. Click **Pause**.
4. **Optional:** In the pause reason list, select a specific reason.

Pause calls of a specific queue

1. In the eMobile Web Client, go to **Queue Panel**.
2. In the top-left corner of the Queue Panel, select a desired queue.

3. On the **Agent** panel, hover your mouse over your extension and change the status.

   a. Click the agent status.
   b. Click **Pause**.
   c. **Optional:** In the pause reason list, select a specific reason.

Unpause queue calls

As a static agent or dynamic agent, you can unpause queue calls when you are ready to take a call.

Unpause calls of all queues

1. In the top navigation bar of eMobile Web Client, click **Agent Status**.
2. Hover your mouse over **Switch Status To**.
3. Click **Unpause**.

Unpause calls of a specific queue

1. In the eMobile Web Client, go to **Queue Panel**.
2. In the top-left corner of the Queue Panel, select a desired queue.

3. On the **Agent** panel, hover your mouse over your extension and change the status.
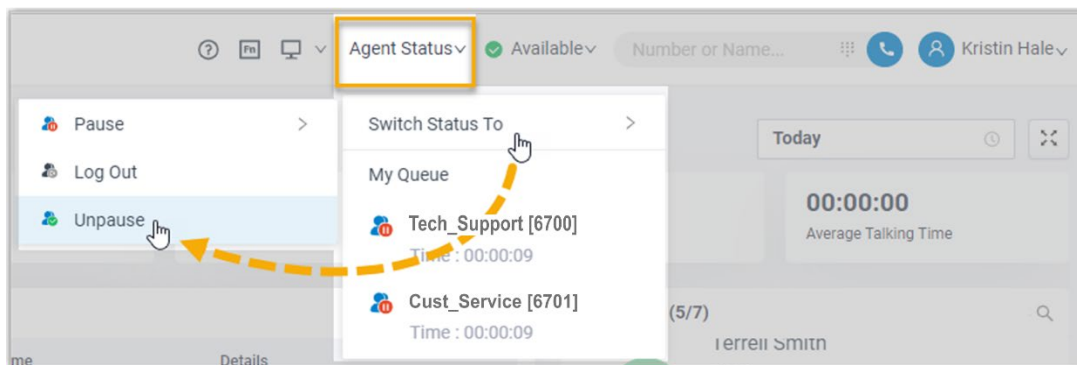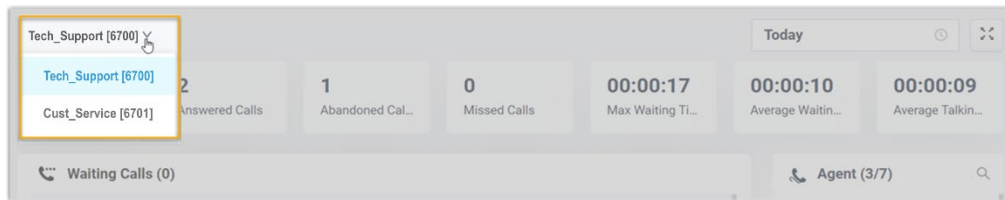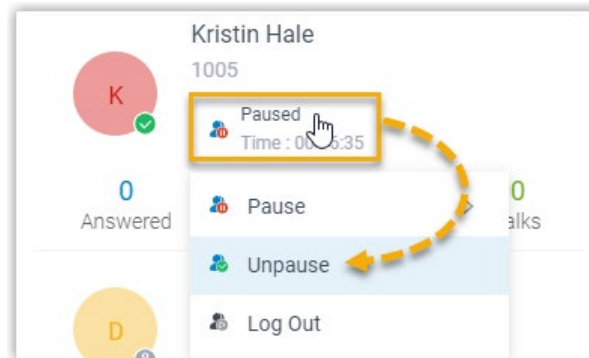

    a.   Click the agent status.
    b.   Click **Unpause**.

# Manage an Agent's Status in a Queue

As a queue manager, you can change an agent's status remotely. This topic describes how to log an agent in to a queue, log an agent out of a queue, pause agents' service, and unpause agents' service.

Prerequisites

- Only a Queue manager can change agents' status.
- To change agents' status, **Switch agents' Status** permission is required .

Log an agent in to a queue

1. In the eMobile Web Client, go to **Call Center Console > Queue Panel**.
2. On the **Agent** panel, hover your mouse over the logged-out agent, and change the status.
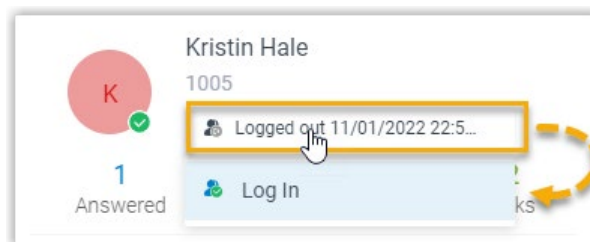
    a.   Click the agent status.
    b.   Click **Log In**.

Log an agent out of a queue

> ✏️ **Note:**
> The static agent cannot log out of a queue.

1. In the eMobile Web Client, go to **Call Center Console > Queue Panel**.
2. On the **Agent** panel, hover your mouse over the logged-in agent, and change the status.
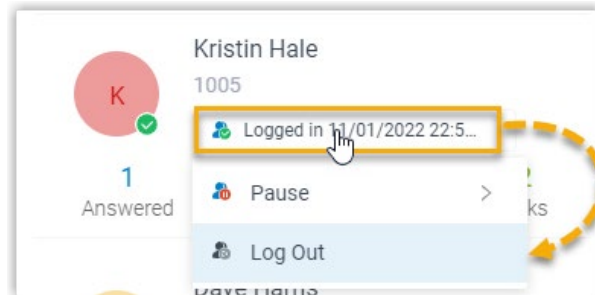

   a. Click the agent status.
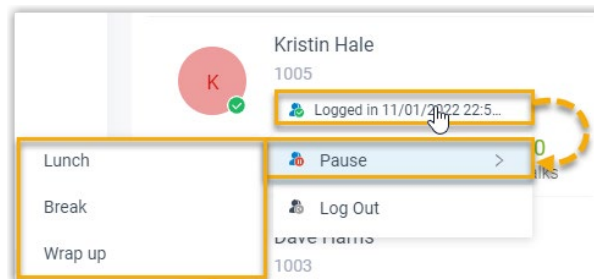   b. Click **Log Out**.

Pause an agent's service

1. In the eMobile Web Client, go to **Call Center Console > Queue Panel**.
2. On the **Agent** panel, hover your mouse over the logged-in agent, and change the status.

   a. Click the agent status.
   b. Click **Pause**.
   c. **Optional:** In the pause reason list, select a reason.

The system will not distribute queue calls to the paused agent.

Unpause an agent's service

1. In the eMobile Web Client, go to **Call Center Console > Queue Panel**.
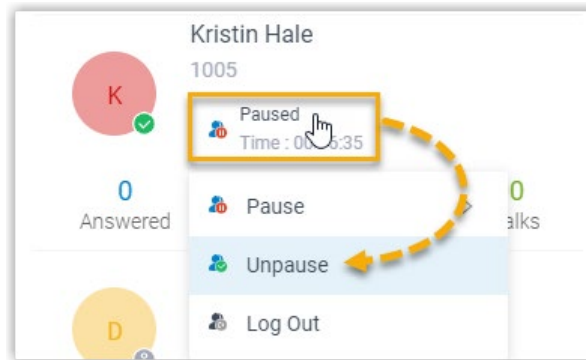2. On the **Agent** panel, hover your mouse over the logged-in agent, and change the status.

   a. Click the agent status.
   b. Click **Unpause**.

The agent becomes available to receive queue calls.

Manage Queue Calls

Pick up a Call

If a call is ringing and has not been answered for a long time, in order to save the callers' user's waiting time, you can pick up the ringing call. This topic describes how to pick up a ringing call.
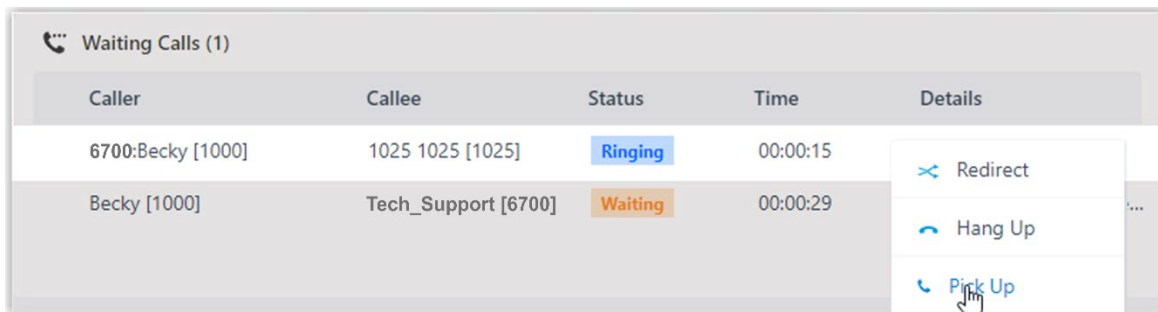
Prerequisites

To pick up agents' incoming calls, **Allow for picking up or hanging up agents' calls** permission is required.

Procedure

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Waiting Calls** panel, hover your mouse over a call that is in Ringing status.
3. Right click the incoming call, and select **Pick Up**.

The PBX system routes the call to your extension.


4. Answer the call.

Redirect a 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 that is in the ringing status.

Prerequisites

To redirect agents' incoming calls, Call distribution management (Redirect, Transfer, Drag and Drop operation) permission is required.

Redirect a call to an extension

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Waiting Calls** panel, hover your mouse over a call that is in Ringing status.
3. Redirect the call to an extension user in one of the following methods:
   - Drag the call and drop it on a desired agent displayed in **Agent** panel. The agent will receive an incoming call.
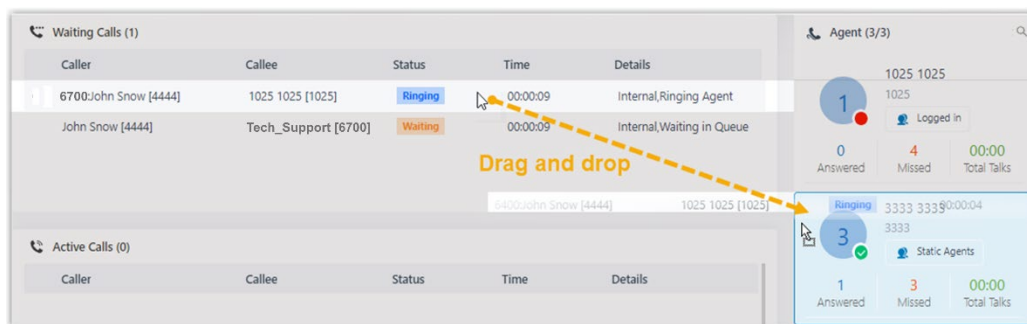
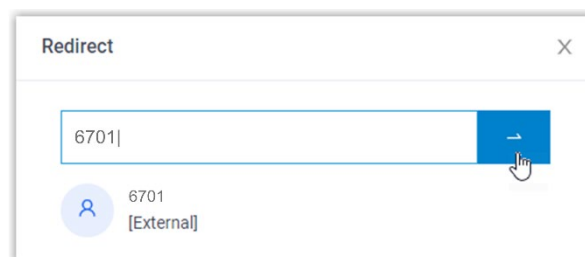   - Right click the call, and click **Redirect**.

On the pop-up panel, enter an extension number, and click →.

The agent will receive an incoming call.

> **ⓘ Tip:**
> You can also click the extension user from the matching results to transfer the call.

Redirect a call to extension voicemail

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Waiting Calls** panel, hover your mouse over a call that is in Ringing status.
3. Right click the incoming call, and select **Redirect**.
4. In the pop-up window, enter an extension number to search the extension user.
5. 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.
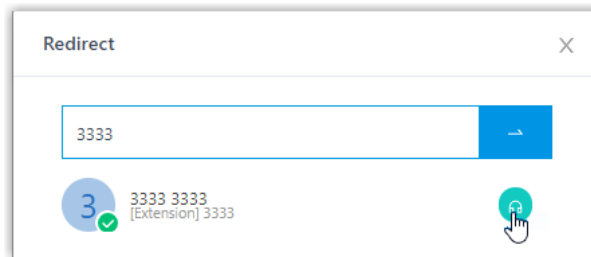

Redirect a call to another ring group or queue

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Waiting Calls** panel, hover your mouse over a call that is in Ringing status.
3. Redirect the call to a ring group or a queue.
   a. Right click the call, and click **Redirect**.
   b. In the pop-up window, enter a ring group number or a queue number, and click →.
      The system will route the call the ring group or queue.
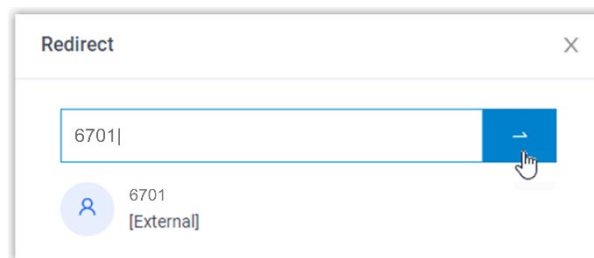
Transfer a Call

This topic describes how to transfer an active call.

### Prerequisites

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

Transfer a call to an agent

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Active Calls** panel, hover your mouse over an active call.
3. 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 **Agents** panel. The agent will receive an incoming call.
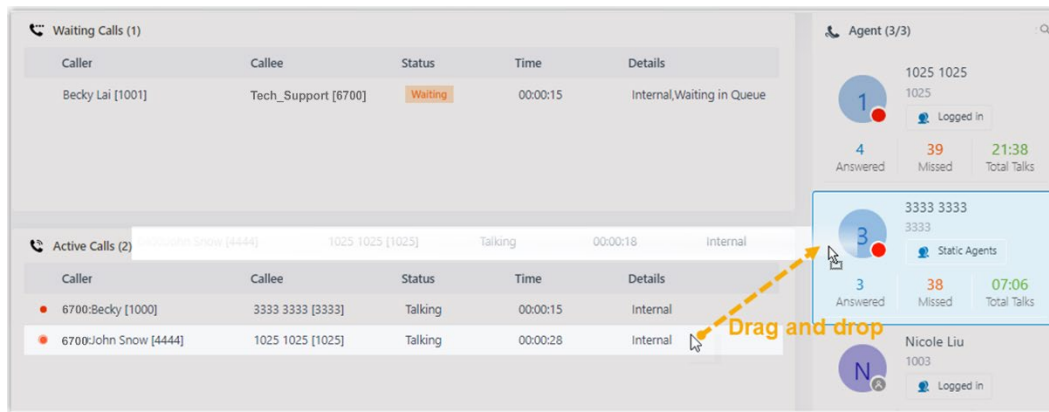
- Right click the call, click **Transfer**, and select a transferred party.
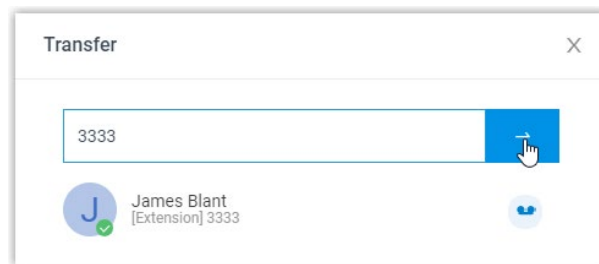
In the pop-up window, enter a target extension number, and click ⟶.

The system routes the call to the agent, 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 an extension's voicemail

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Active Calls** panel, hover your mouse over an active call.
3. Right click the call, and select **Transfer**.
4. In the pop-up window, enter an extension number to search the extension user.
5. From the matching results, click 🔵 to transfer the call.

The system routes the call to the extension's voicemail. The caller can leave a message to the selected extension user.
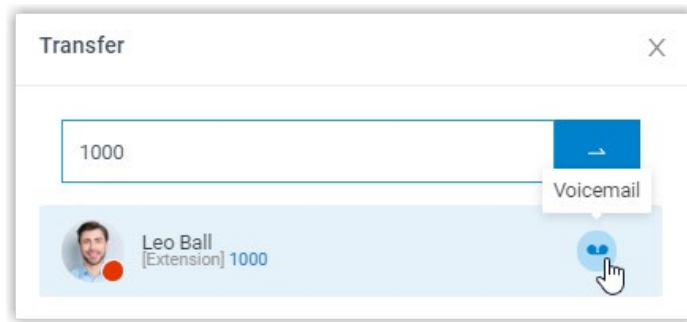
Park a Call

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.

Prerequisites

To park agents' active calls, **Call parking operation** permission is required.

Procedure

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Active Calls** panel, hover your mouse over an answered call.
3. Right click the answered call, and select **Parked**.
4. 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.
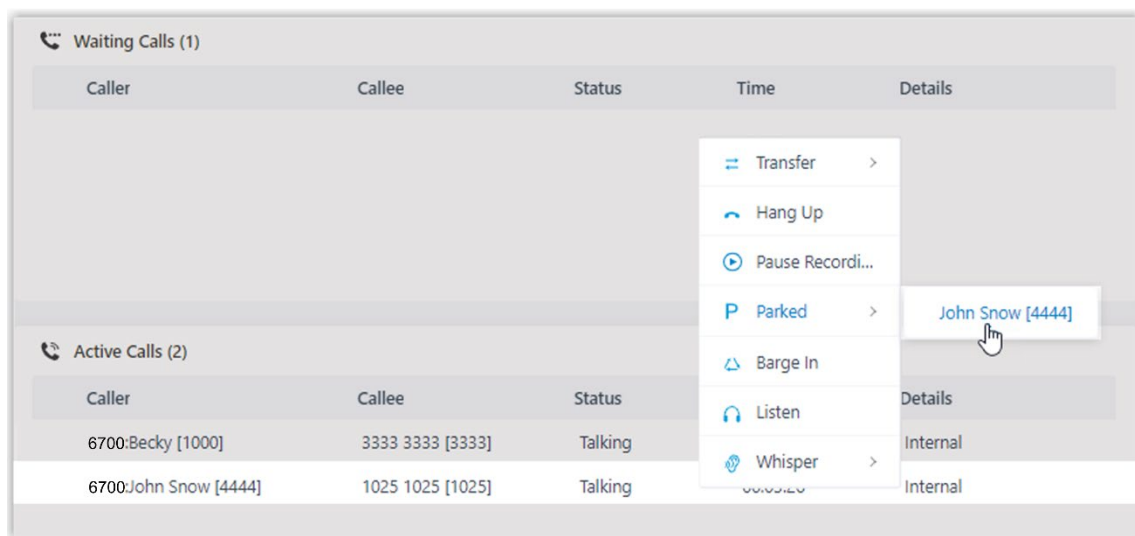
Switch Call Recording Status

If administrator has enabled call recording for specific queues, the specified queue 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 queue 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 by the administrator.

  > **Note:**
  > - **Pause/Resume** permission allows you to pause or resume the recording during a queue call that is specified to be recorded.
  > - **Start/Pause/Resume** permission allows you to start, pause, or resume the recording during any queue calls, be the calls specified to be recorded or not.

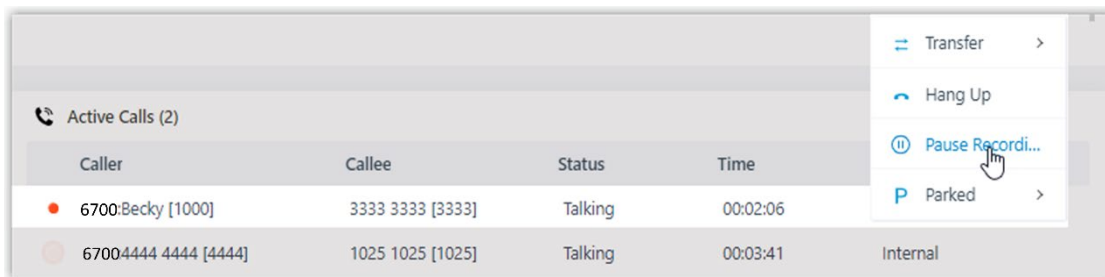- To switch call recording status for other agents, **Switch agent's recording status** permission is required.
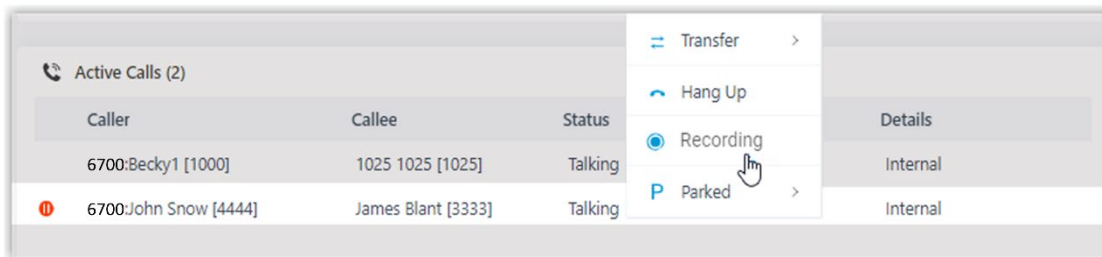
Procedure

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Active Calls** panel, hover your mouse over a call being recorded.
3. To pause recording, right click the call, and click **Pause Recording**.

The recording icon stops flashing, and changes to ⏸.

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

The recording icon is changed to ⏺ and flashing.

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

For sales and support in call center, call monitoring is a way to manage call quality, increase agent efficiency, improve agent performance, and develop sales or marketing strategies.

You can monitor agents' conversations in the following ways:

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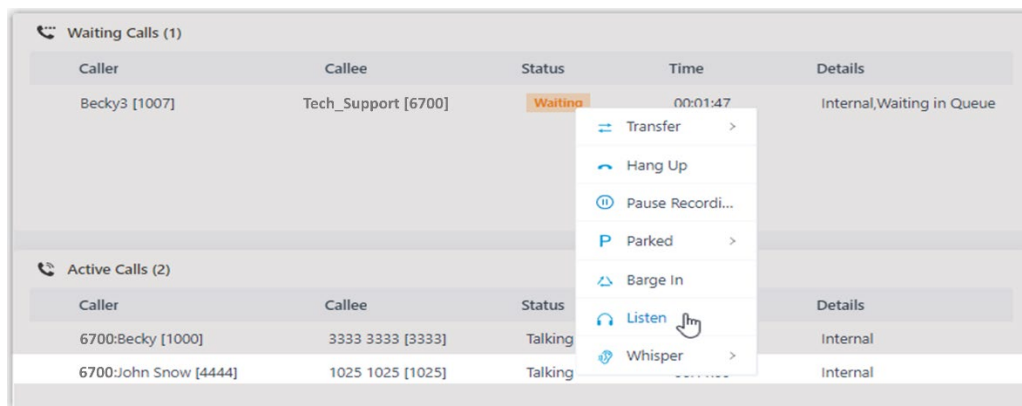
Prerequisites

- You are queue manager.
- To monitor agents' calls, **Call monitoring operations (Listen, Whisper, Barge In)** permission is required.

Procedure

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Active Calls** panel, hover your mouse over an active call.
3. Right click the call, and select a monitor mode: **Barge In**, **Listen**, or **Whisper**.

The system places a call to your extension.
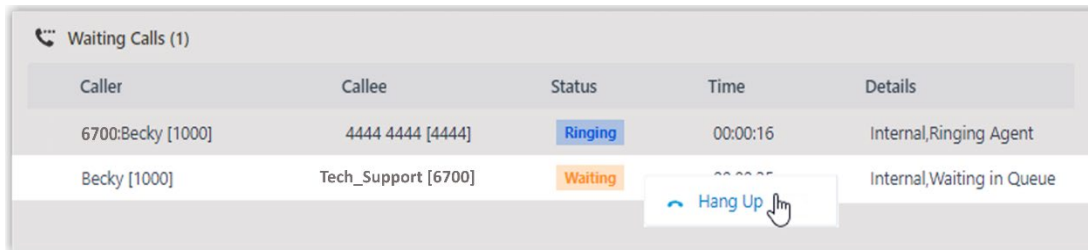

4. Answer the call.

Hang up a Call

This topic describes how to hang up a call.

Prerequisites

To hang up agents' calls, **Allow for picking up or hanging up agents' calls** permission is required.

Procedure

1. In the eMobile Web Client, go to **Queue Panel**.
2. On the **Waiting Calls** or **Active Calls** panel, hover your mouse over a call.
3. Right click the call, and select **Hang Up**.

4. In the pop-up dialog box, click **OK**.
   The system ends the call.

Place a Call to an Agent

ESI eMobile Web Client allows you to place calls to any agents. This topic describes how to place a call to an agent quickly on Call Center Console.

Procedure

1. On the **Agent** panel, hover your mouse over the agent's avatar.
2. Double-click the avatar.

A call window pops up that allows you to manage the call.