Call Monitoring

Monitor Calls

The Call Monitoring module enables authorized users to silently monitor any active call that is managed by the Webex Contact Center service at any time, across any site, and to verify that customers are being served in a professional manner. Authorized users can also create monitoring schedules, coach an agent who is connected to a call by providing comments that only the agent can hear, and barge in on calls as needed.

Monitoring Overview

The Webex Contact Center Call Monitoring module enables contact center managers to monitor the quality of service being delivered across their multisource contact centers. Through a simplified Web interface, authorized users can select a combination of one or more queues, sites, and teams, as well as a specific agent that they want to monitor. After these criteria are entered, the system places a request to monitor the next call that matches the combination of all the criteria when the call is distributed to the destination site. Monitoring can be done on a continuous, one time only (ad hoc), or scheduled basis, and authorized users can monitor a call that is already in progress.

The audio for the call is delivered through an inbound phone call using a phone number associated with the user engaged in monitoring. Authorized supervisors can coach an agent during a connected call by providing comments that only the agent can hear and can barge in on a call and become part of the conversation between the agent and the customer.

Note the following:

- You cannot make a continuous monitoring request and an ad-hoc request for the same target at the same time.
- If a scheduled request and a continuous request are made for the same target, the continuous request takes precedence. When the continuous request is paused or canceled, the scheduled request is enabled.
- If a scheduled request and an ad-hoc request are made for the same target, the ad-hoc request takes precedence. When the ad-hoc request is either canceled or completed, the scheduled request is enabled.
- If you sign out of the Management Portal while a monitoring request is still active, a message asks if you want to cancel the monitor request or continue monitoring.

If you select **Yes**, any active ad-hoc, or continuous monitoring requests are canceled after you log out. Any scheduled requests are suspended.

Monitor calls

The **Call Monitoring** page provides an interface for monitoring a call on a continuous or one-time only basis, and till the agent level.

Procedure

Step 1 From the Management Portal navigation bar, select **Call Monitoring**.

Step 2 In the Monitoring Filter panel on the left side of the page, specify one or more queues, sites, teams, and agents that you want to monitor. If you leave a queue, site, team, or agent list set to All, it includes only entities to which you have access to in the request.

Step 3 In the **Callback Number** field, enter the phone number to send the audio, and click **Register**. If you must update a number, enter the new callback number and click **Update**.

Note
- Enter all the digits required to reach that phone, without hyphens or other special characters. For example, if the phone number is 415-555-1234, enter 4155551234.
- The callback number for monitoring must be same as the one used by the supervisor in Agent Desktop when logging in, or the monitoring request will fail.

Step 4 To prevent this monitoring session from being displayed on the Management Portal for other users, check the **Use Invisible Mode** check box.

Step 5 Click one of the options described in the following table to submit your call monitoring request.

Note The system disables these options if you don't have a callback number registered.

Select this option	To do this
Monitor Next Call	Monitor the next incoming call that fits the specified criteria.
Continuous Monitor	Continuously monitor calls that fit the specified criteria. After you click this button, a dialog box appears where you can enter the duration of the monitoring session in minutes, or keep the default to Unlimited. Then, click **Monitor** to dismiss the dialog box and submit your request. **Note** After the monitoring duration has expired, the system may take up to five minutes to remove the call monitoring request, during which time one more call might be delivered to you.

Your request appears in the Monitor Requests list along with any pending requests from your colleagues.

When a call that matches the criteria you specified is distributed to the destination site, the audio is delivered through a phone call to the number that you specified. The monitored call appears in the Calls Being Monitored list.

For more information about the **Call Monitoring** page, see Viewing Call Monitoring Information, on page 4.

Step 6 If authorized by your user profile, you can click the **Coach** or **Barge In** button in the **Action** column to coach the agent or barge in on the monitored call. For details, see Barge in on a Call, on page 3.

Step 7 When the call ends, click **Monitor Next Call** to monitor the next call in the queue. Alternatively, if you selected the **Continuous Monitor** option, the next call in the queue is automatically sent to you.

Step 8 Click **Cancel** to cancel the monitoring activity for that request. If you selected **Continuous Monitor**, you can click the **Pause** button to temporarily halt the calls sent to your number. You can then click the **Resume** button to resume monitoring.

Note If an agent goes into the Not Responding state, the call goes back to the queue and the caller hears music on hold. If a supervisor is monitoring the call during this time, the supervisor is disconnected as well. If the supervisor is scheduled to monitor the call but has not yet picked up the call, it disappears from the Monitor Requests list and the phone stops ringing.

Coach an Agent

If the Whisper Coach feature is enabled in your user profile, you can speak to an agent who is being monitored without being heard by the customer.

- The coaching session continues, even if the call is transferred to another agent, until the call either ends or is transferred to another number (agent-to-DN transfer).
- If the coached agent consults with another agent, you hear music on hold and are not able to continue coaching the agent until the caller is taken off hold.

While coaching an agent, you can barge in on the call if the Barge In feature is enabled in your user profile.

To silently coach an agent:

Procedure

Step 1 While you monitor a call (as described in Monitor calls, on page 2) and the call is connected to an agent, click **Coach**.

Do not click **Coach** if the call is waiting in a queue after being transferred by the agent to another queue. Doing so causes your coach request to fail.

The **Coach** button is not available when the agent transfers the call to another number (DN transfer).

Step 2 Provide verbal instructions to the agent.

Step 3 To remove yourself from the call, hang up. The call is removed from the Calls Being Monitored list.

Barge in on a Call

Authorized users can use the Barge-In function to join a call they are monitoring and participate in the conversation between the agent and the customer unless the call is transferred to another number (agent-to-DN transfer), after which the call is removed from the Calls Being Monitored list. To barge in on a call:

Procedure

Step 1 While you are monitoring or coaching a call, and the call is connected to an agent (and not waiting in a queue), click **Barge In**.

You are immediately connected to the call. The **Barge In** button disappears from the page.

Step 2 To remove yourself from the call, hang up. The call is removed from the Calls Being Monitored list.

Viewing Call Monitoring Information

To view call monitoring information, from the Management Portal navigation bar, click **Call Monitoring**

The Call Monitoring page displays the following:

- Controls for requesting a monitoring session. For more information, see Monitor calls, on page 2.
- A chart of active and queued calls for the queue that is currently selected in the Monitoring Filter panel on the left side of the page.
- The Monitoring Requests/Calls Being Monitored table, which displays the two lists described in the following sections.

Note If you resize the Call Monitoring window to a very narrow size, the Monitoring Requests/Calls Being Monitored table displays at the bottom of the window. It might appear that the table is missing, but you can see it if your scroll to the bottom of the window.

Calls Being Monitored List

The Calls Being Monitored list displays information about all calls currently being monitored in your enterprise.

Note When a monitored call is transferred to a specific phone number (agent-to-DN transfer), it is removed from the Calls Being Monitored list and thus, the Coach and Barge In buttons are no longer available.

Table 1: Calls Being Monitored List

Column	Description
Queue	The queue that received the call.
Site	The contact center location to which the call was distributed.
Team	The team to which the call was distributed.
Agent	The name of the agent being monitored or a numeric ID code if the call was answered by a capacity-based team resource instead of by a Webex Contact Center agent.

Column	Description
Monitoring Status	The status of the monitoring session: • **monitoring-started**: The monitoring supervisor has picked up the phone. • **connected**: The agent has picked up the call. • **CoachStarted**: The monitoring supervisor has started coaching the agent. • **barged**: The monitoring supervisor has barged in on the call.
Supervisor Name	The name of the person monitoring the call.
Supervisor Number	The phone number of the person monitoring the call.
Duration (mm:ss)	The number of minutes and seconds since the call arrived.
Action	Buttons that you can click to coach or barge in on a call that is being monitored, if authorized by your user profile.

Monitoring Requests List

The Monitor Requests list displays information about all monitoring requests in your enterprise.

If a monitoring request includes multiple queues, sites, teams, or agents, you can display a list of them in a tool tip by placing your mouse on a value in the Queue, Site, Team, or Agent column.

Table 2: Monitoring Requests List

Column	Description
Request Type	The request types are: • **Continuous**: The specified target (queue, team, site, or agent) is continuously monitored until the request is paused or canceled or until the monitoring duration is reached if the monitoring user specified a duration. You can point to the word Continuous to display a tooltip showing the duration of the monitoring request or Unlimited if no duration was specified. • **Scheduled**: A call monitoring schedule for the specified target is set up and running. • **Ad-Hoc**: The next call that matches the specified criteria is monitored.
Queue	The queues included in the request. If multiple queues are included, you can display a list of them by pointing to the value displayed in the column.
Site	The sites included in the request. If multiple sites are included, you can display a list of them by pointing to the value displayed in the column.
Team	The teams included in the request. If multiple teams are included, you can display a list of them by pointing to the value displayed in the column.

Column	Description
Agent	The agents included in the request. If multiple agents are included, you can display a list of them by pointing to the value displayed in the column.
Monitoring Status	The status of the monitoring session: • **Request Pending**: The request is submitted. • **Monitoring**: The supervisor has picked up the phone.
Supervisor Name	The name of the person who submitted the request.
Supervisor Number	The phone number of the person who submitted the request.
Action	Buttons that you can click to pause, resume, or cancel a monitoring request.

Working with Monitoring Schedules

The **Monitoring Schedules** page in the Call Monitoring module enables authorized users to schedule call monitoring requests at specific times of the day or week. Note the following:

- Unless otherwise authorized by your user profile, you can view and edit only those call monitoring schedules that you created.
- The start and end times specified in the Call Monitoring Schedule use the enterprise time. However, calls are monitored in local time. Be sure to adjust for this when you specify the start and end times in your monitoring schedules.

Create or Edit a Monitoring Schedule

To create a new monitoring schedule or edit an existing schedule:

Procedure

Step 1 From the Management Portal navigation bar, choose **Call Monitoring** > **Schedule**.

Step 2 To create a new schedule:

- From the list view, click **New Schedule**.

  - OR -

- From the calendar view, point to the beginning date of the schedule and click the **Create** link that appears at the upper-left corner of the date box.

Step 3 To copy or edit an existing schedule from the list view, click the ellipsis button beside a listed schedule and choose **Copy** or **Edit**.

Step 4 On the page that appears, specify the appropriate settings as described in the following table:

Setting	Description
Name	Enter a name for the schedule.

Setting	Description
Start Date and End Date	To select the start date (the date on which the schedule becomes effective) and end date (the date on which the schedule expires), click the appropriate calendar icon in the **Start Date** or **End Date** field, and then select a date from the calendar that appears.
Start Time and End Time	Enter the time of the day that you want the schedule to start and end. Specify the time in the 24-hour format (0000–2400). Note that the time that you specify in the Call Monitoring Schedule is based on the enterprise time. However, calls are monitored in the local time. **Note** Pending monitor requests are checked every 'n' number of seconds as configured in your system. The default interval is five minutes. When the checking starts, each monitor request is checked and validated. If the request is past the scheduled deadline (that is, the End Time value), it is removed from the pending monitor requests list. Because of this added functionality, the scheduled end time may actually occur a few minutes later than specified.
Day of Week	From the drop-down list, select **All Days** if you want the schedule to run every day, or **Weekdays** if you want the schedule to run from Monday through Friday only. OR Click each icon that represents a day during which you want the schedule to run.
Status	Click **Active** if you want the schedule to become effective at the specified start time on the specified start date. Otherwise, click **Not Active**.
Callback Number	This field displays the phone number to which the audio is sent.
Filter By	Select the queues, sites, teams, and agents that you want to be monitored as part of this schedule.

Step 5 Click **Save**.

Activate or Deactivate Monitoring Schedules

You can activate or deactivate a monitoring schedule by editing the **Status** field in the settings for the schedule, or you can click a button in the list view **Monitoring Schedules** page as follows:

Procedure

Step 1 From the Management Portal navigation bar, choose **Call Monitoring** > **Schedule**.

Step 2 Click the ellipsis button beside a listed schedule and click **Activate** or **Deactivate**.

Export the Monitoring Schedule List

To export the monitoring schedule list to a data analysis tool such as Microsoft Excel:

Procedure

Step 1 From the Management Portal navigation bar, choose **Call Monitoring** > **Schedule**.

Step 2 In the list view, click **Action** on the upper-right side of the page header and choose **Excel** or **CSV**.

Step 3 In the dialog box that opens, either click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.

Delete a Monitoring Schedule

To delete a monitoring schedule:

Procedure

Step 1 From the Management Portal navigation bar, choose **Call Monitoring** > **Schedule**.

Step 2 In the list view, click the ellipsis button beside a listed schedule and click **Delete**.

Step 3 Click **Yes** to confirm the deletion.