Cisco IP Phone Agent User Guide

CAD 10.0 for Cisco Unified Contact Center Express Release 10.0

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Introduction

Cisco IP Phone Agent (IPPA) is a service added to your Cisco IP phone. It allows you to:

- Log in and log out of the Automatic Call Distributor (ACD)
- View caller (enterprise) data when receiving a call
- View contact service queue (CSQ) statistics
- Change your agent state
- Record your own calls (Enhanced and Premium versions only, if configured)
- Enter a reason code when changing agent states
- Enter wrap-up data when changing to Work state (Enhanced and Premium versions only)

IPPA allows you to perform agent tasks using your IP phone without having to use a computer.

Hardware and Software Environment

For information about the hardware and software that is supported by Cisco IP Phone Agent, see the *Cisco Unified Contact Center Express (Cisco Unified CCX) Software and Hardware Compatibility Guide at*:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_compatibility/matrix/crscomtx.pdf

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IP Phone Agent Feature Levels

There are three feature levels of IPPA: Standard, Enhanced, and Premium. The following chart outlines the features available in each version. All features not listed here are present in all versions.

Feature	Standard	Enhanced & Premium
Reason codes	●	●
Wrap-up data		●
Caller data	●	●
CSQ data	●	●
Work ACD agent state		●
Agent-initiated recording		●
Supervisor-initiated monitoring		●
Supervisor-initiated recording		●

Language Support

IPPA has been localized for these languages:

- Chinese (Traditional)—requires phones with UTF-8 support
- Chinese (Simplified)—requires phones with UTF-8 support
- Danish
- Dutch
- English
- Finnish
- French
- French (Canadian)
- German
- Italian
- Japanese (Kanji)—requires phones with UTF-8 support
- Japanese (Katakana)—requires phones with Shift-JIS support
- Korean—requires phones with UTF-8 support
- Norwegian
- Polish
- Portuguese
- Russian—requires phones with ISO-8859-1 without Unicode escapes
- Spanish
- Swedish
- Turkish

The IP Phone Agent Screen

To access the IPPA screen, press the Services button on your IP phone. The only screen that requires you to use the number pad to enter data is the login screen. All of the other screens use selection menus.

> **NOTE:** See your IP phone documentation for explanations of your phone's functions and features.

> **NOTE:** If you cannot view the complete display on your phone screen, use the scroll buttons to scroll up and down.

Soft Keys

Each screen displays specific soft keys. All of the keys that appear are listed in Table 1.

Table 1.   Soft keys

Soft key	Description
<<	Deletes an entry backward, one character at a time.
CData	Displays the caller data for the current call.
Exit	Exits the current screen and displays the default phone screen.
OK	Closes the screen.
Option	Displays a menu from which you can start or stop recording an ACD (and if enabled, non-ACD) call.
Select	Activates the option you have highlighted on the screen.
Stats	Displays the CSQ statistics for the current session.
State	Displays a menu from which you can change your ACD agent state.
Submit	Submits the data on the screen to the ACD server. Used only when logging into the ACD server.
Update	Updates the CSQ statistics display.

Choosing Menu Options

To choose a menu option on any IPPA screen, you can use either of two methods:

■   Use the scroll key to highlight the menu option you want, then press the Select soft key.

■   Enter the desired menu option's menu number on the number pad.

Logging In

Logging in is the only task in IPPA that requires you to use the number pad to enter information.

To log in:

1. Press the Services button on your IP phone. The screen of your IP phone displays the Services menu as shown in Figure 1.

Figure 1.   IP Phone Agent initial menu (your menu might differ)

Time and date   Primary extension

```
14:23 02/15/13                    2101
☎ SERVICES                          ☎
1 IP PHONE AGENT                    ☎



Make Your Selection...
Select          Exit
```

Screen title
Menu option
Soft key definitions
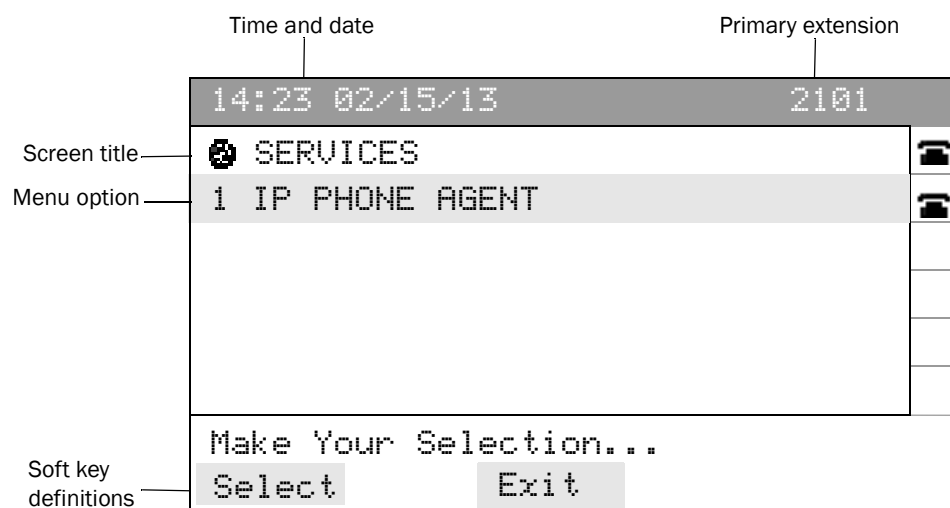
2. Choose IP Phone Agent from the menu. The Agent Login screen appears as shown in Figure 2.

Figure 2.   Agent Login screen

```
┌─────────────────────────────────────────────┐
│ 14:23 02/15/13                    2101       │
├───────────────────────────────────────┬──────┤
│ ☎ Agent Login                         │  ☎   │
│                                       ├──────┤
│    Name:                              │  ☎   │
│                                       ├──────┤
│    Password:                          │      │
│                                       ├──────┤
│    Extension:                         │      │
│                                       ├──────┤
│                                       │      │
├───────────────────────────────────────┴──────┤
│ Enter agent information.                      │
│ Submit << Exit                                │
└─────────────────────────────────────────────┘
```

NOTE: Your display might differ from the display shown in Figure 2, depending on how your administrator configured your IP phone.

3. Using the number pad on your IP phone, enter your agent ID, password, and phone extension in the appropriate fields.

Use the scroll key to move from field to field. If you make a mistake, use the << soft key to delete your entry one character at a time.

NOTE: The IP Phone Agent Login screen accepts both letters and numbers. When you press a number key, a menu appears that shows that number and its corresponding letters. (For example, if you press the 4 key, you see a menu that includes g, h, i, 4, G, H, and I.) To select a letter, press a number key repeatedly until the desired character is highlighted. When you stop pressing the key, your choice appears in the field.

NOTE: The Agent Login screen prompts you either for agent ID or agent name, depending on how your administrator configured the system. If you are prompted for your agent ID, then the password must be entered as numbers only.

4. Press the Submit soft key to log in. The CSQ Stats screen appears.

You are now logged into the ACD. Your agent state is automatically set to Not Ready.

NOTE: If your team assignment is changed, then you must restart IPPA for the change to go into effect.

Forcing a Login

If you try to log in using an agent ID or extension that is already in use, the Forced Login menu appears as shown in Figure 3.

Figure 3.   Forced Login menu
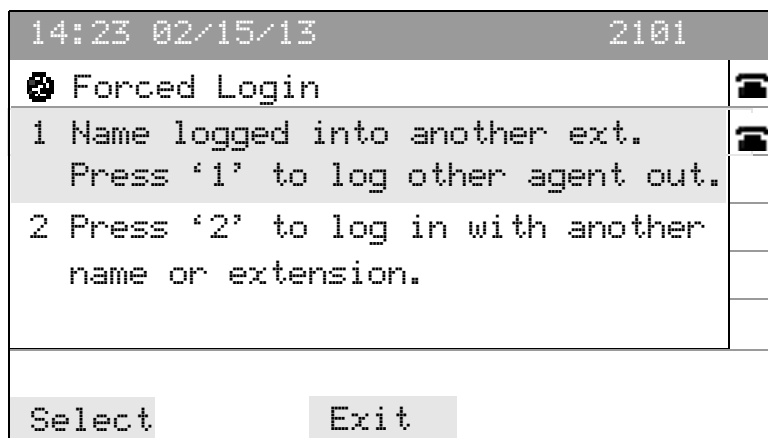
If you choose Option 1, which is called a forced login, the other person using that agent ID or extension is forcibly logged out and you are logged in.

If you choose Option 2, you return to the Agent Login screen so you can attempt a login using an agent ID or extension that is not in use.

Call Control

You can use the IP phone's soft keys to perform call control activities when you are logged in as an IP Phone Agent.

When you are logged in as an IP phone agent, you are in IPPA mode. To perform call control activities, press the Services button to switch to Phone mode. In Phone mode, you can use the IP phone's soft keys corresponding to the call control activity you want to perform.

To return to IPPA mode, press the Services button again.

Contact Service Queue Statistics

You can view CSQ statistics whenever you are logged into IPPA. The CSQ Stats screen is the default view as shown in Figure 4. To access the CSQ Stats screen from any other screen, press the Stats soft key.

> **NOTE:** To perform any call control actions when the CSQ Stats screen is displayed (for instance, make a call), you must first press Services to return to the normal phone display screen.

Figure 4. Contact Service Queue Stats screen (default view)

The screen displays the longest queue time and the number of calls in queue to the CSQs to which the agent belongs.

> **NOTE:** There are certain times when the CSQ Stats will not be visible—for instance, if you make a call while in the Not Ready state and then hang up, or if you receive a call, conference it, and then hang up. When this happens, you must press the Services button and select IP Phone Agent from the menu to view the CSQ Stats screen again.

Refresh Rate

The default refresh rate for the CSQ Stats screen is 10 seconds. You can also refresh the statistics manually by pressing the Update soft key.

Caller Data

The IPPA service displays caller data in the Caller Data screen (Figure 5). Caller data appears on your IP phone when the phone rings, is updated when the phone is answered, and remains there throughout the call.

Figure 5 shows a Caller Data screen displaying sample data. The data that is displayed on your screen will differ. The type of data that appears in this screen is configured by your administrator.

> **NOTE:** To perform any call control actions when the Caller Data screen is displayed (for instance, make a call), you must first press Services to return to the normal phone display screen.

Figure 5.   Caller Data window (your data might differ)

```
14:23 02/15/13                    2101

☎ Caller Data - ID:Jones          ☎

Service: Sales                    ☎

DNIS: 2101

ANI: 2301

Account: 7843982


◁]Talking
          Stats          Option
```
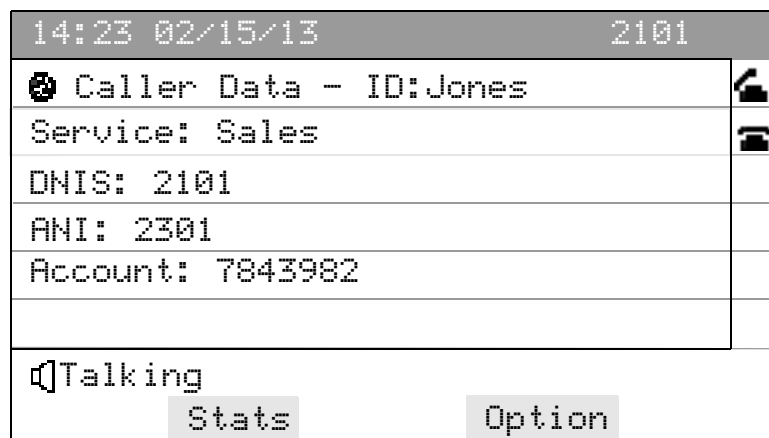
The Option soft key is visible only if agent-initiated recording is enabled by the administrator.

Agent States

The available agent states in IPPA are listed in Table 2.

Table 2.   Agent states

State	Description
Logout	You are logged out of the ACD.
Not Ready	You are not available to receive routed[1] calls. If you receive a non-routed call you are automatically put into the Not Ready state, and returned to the previous state when the call ends.
Ready	You are available to receive routed calls. If you receive a routed call you are automatically put into the Reserved and then Talking state when the call is answered.
Talking	You are on the phone for a routed call. This state is automatically set for you by the ACD and does not appear on a menu.
Work	You are completing work from a previous call and, when finished, will be available to receive routed calls. (Available only in Enhanced and Premium versions.)

1 A routed call is one that comes in through the ACD. A call to your direct phone number is a non-routed (or non-ACD) call and not subject to these rules.

Changing Your Agent State

You change your agent state by choosing the appropriate state from the Change State screen as shown in Figure 6. The menu you see displays only the states that you can choose from your current state. Your current agent state is always noted on the bottom line of the IPPA screen.

To change agent state, choose the appropriate agent state from the menu.

Figure 6.   Agent State menu screen

Options available in the current agent state

Current agent state
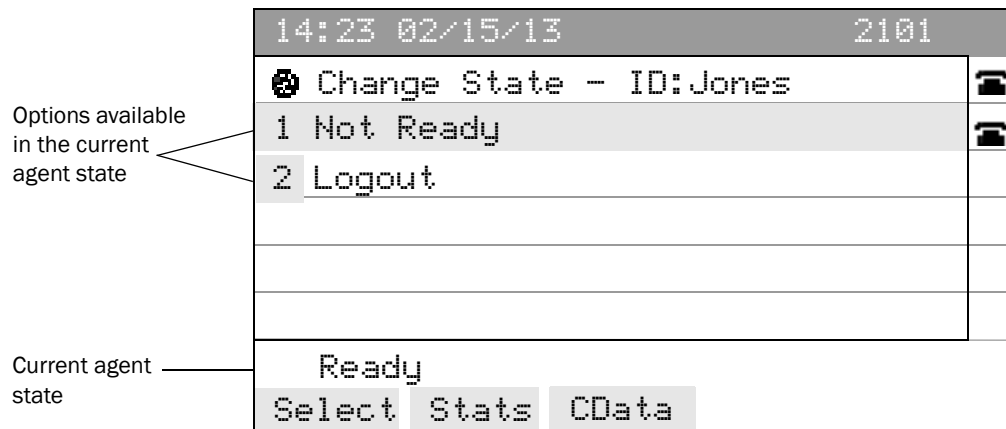
Changing Your Agent State While On a Call

While you are on a call, IPPA displays the Caller Data screen. The menu you see displays the Stats soft key (and the Options soft key, if agent-initiated recording is enabled by the administrator). To change your agent state while you are on a call, you must navigate to the CSQ Stats screen and from there change the agent state.

To change your agent state:
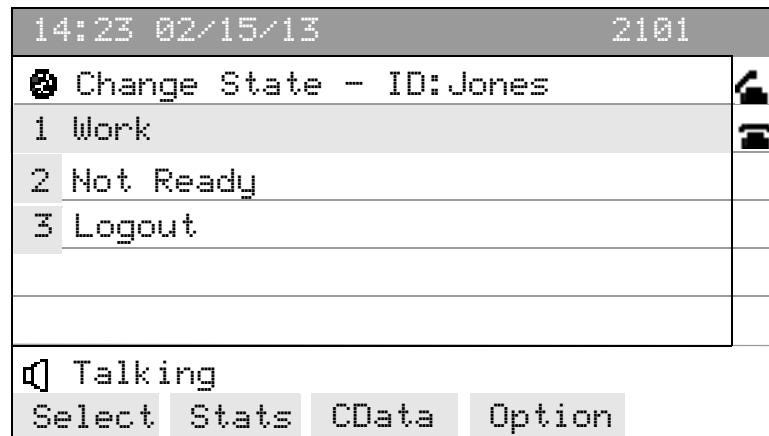
1. Press the Stats soft key on your IP phone. The CSQ Stats screen appears.

2. Press the State soft key. The Change State screen appears.

3. Choose the appropriate agent state as shown in Figure 7.

    NOTE: When you change agent state while on a call, the agent state shown on the screen does not change. Your screen continues to show your state as Talking. The agent state you selected takes effect when the call terminates.

    Figure 7.   Agent State screen while on a call

    ```
    14:23 02/15/13                2101

    ☎ Change State - ID:Jones            📞

    1 Work                               ☎

    2 Not Ready

    3 Logout



    ◁] Talking
    Select  Stats  CData  Option
    ```

Reason Codes

You might be required to enter a descriptive reason code when you change your agent state to Not Ready or when you log out. Reason codes are created by your administrator and are customized for your contact center.
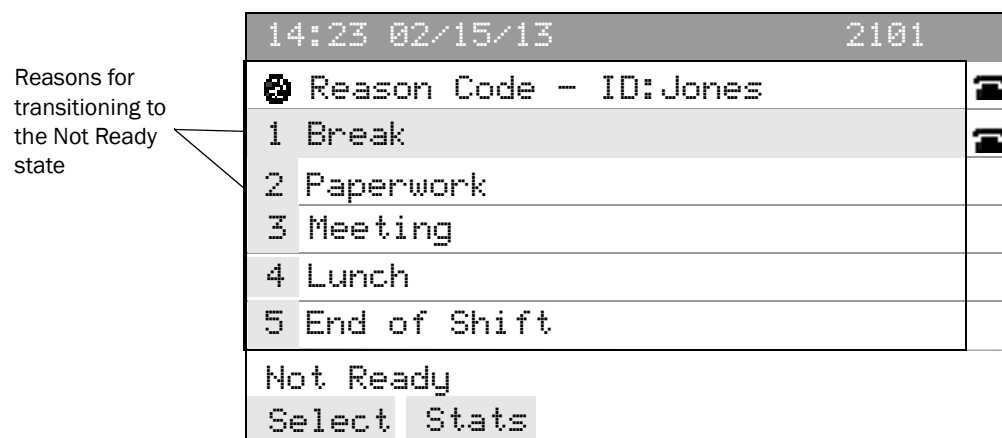
Figure 8 shows a Reason Code menu with sample reason codes. The reason codes that are displayed on your screen will differ.

If your administrator has enabled reason codes, whenever you change your agent state to Not Ready or log out, IPPA prompts you to enter a reason code.

To enter a reason code, choose the appropriate reason code from the menu.

You can choose the Not Ready state again when you are already in the Not Ready state. This enables you to enter another reason code. Reports will show back-to-back Not Ready state changes with the appropriate times in state and the respective reason codes.

Figure 8.   Sample Reason Code screen

Reasons for
transitioning to
the Not Ready
state

```
14:23 02/15/13                    2101

⊗ Reason Code - ID:Jones          ☎

1 Break                           ☎

2 Paperwork

3 Meeting

4 Lunch

5 End of Shift

Not Ready
Select  Stats
```

Wrap-up Data

You might be required to enter wrap-up data when you change your agent state to Work. Wrap-up data are descriptions used by contact centers for such purposes as tracking the frequency of different activities or identifying the account to which to charge a call.

Figure 9 shows a Wrap-up Data menu with sample wrap-up data. The wrap-up data that is displayed in your menu will differ.

Wrap-up data are created by your administrator and are customized for your work group. If your administrator has enabled wrap-up data, whenever you change your state to Work during a routed call, after the call ends IPPA prompts you to enter wrap-up data. You might also be prompted to enter wrap-up data if the CSQ through which you received the call has been configured with the Automatic Work option.

To enter wrap-up data, choose the appropriate wrap-up data from the menu.

Figure 9.   Sample Wrap-up Data screen (your wrap-up data might differ)

Wrap-up Data

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Figure 9 shows a Wrap-up Data menu with sample wrap-up data. The wrap-up data that is displayed in your menu will differ.

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To enter wrap-up data, choose the appropriate wrap-up data from the menu.

Figure 9.   Sample Wrap-up Data screen (your wrap-up data might differ)

```
14:23 02/15/13                    2101
⊕ Wrap-up Data - ID:Jones
1 Account Balance Inquiry
2 New Account
3 Close Account
4 Support Inquiry

Work
Select  Stats
```

Agent-Initiated Recording

You can start and stop recordings of any ACD call you receive on your IP phone if you have the Enhanced or Premium version of IPPA and your administrator has enabled the agent-initiated recording feature. You can also record non-ACD call if enabled by your administrator.

You cannot listen to any recordings you make. Recordings are available for review only to your supervisors through Cisco Supervisor Desktop.

When you are recording a call, "Rec" appears on the status line of your IP phone screen, as shown in Figure 11:

1. While on an active call, press the Option soft key on your IP phone. The Options menu appears as shown in Figure 10.

Figure 10.   Options menu screen

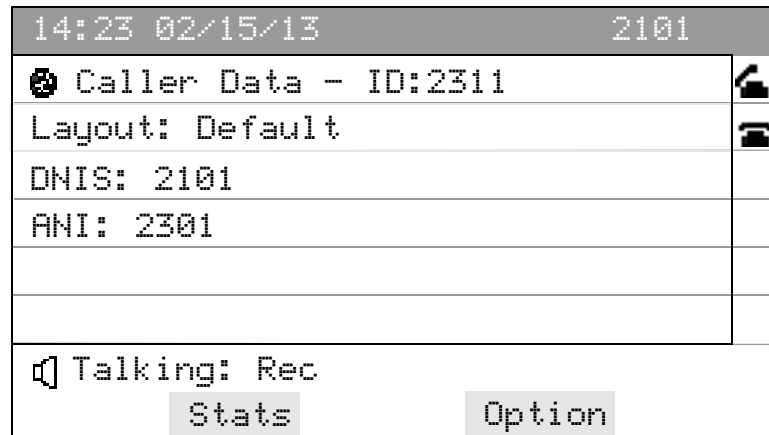```
14:23 02/15/13   2101
⊗ Options - ID:2311   📞
1 Start recording   ☎

    Talking
Select Stats CData
```
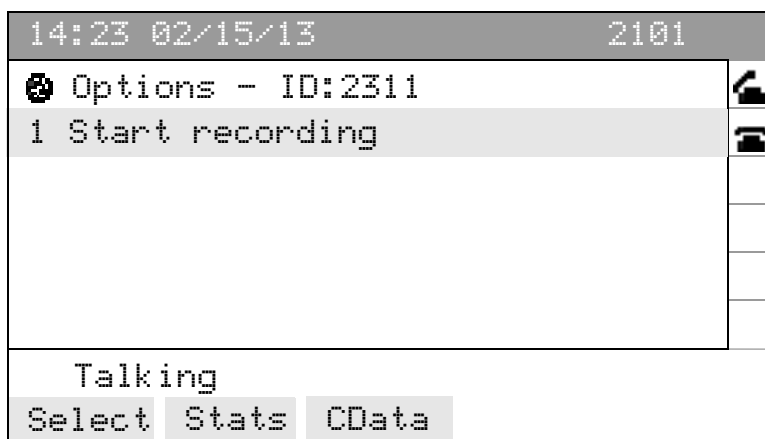
2. Choose Start recording from the menu. "Rec" appears on the status line to indicate that you are recording the call as shown in Figure 11.

NOTE: The Options screen shows the "Start recording" option only if you are not currently recording a call. If you are already recording a call, the Options screen shows only the "Stop recording" option.

NOTE: If you have calls on hold while talking to someone on the phone, you cannot select a particular call to record. In this case, when you select the "Start Recording" option, IPPA selects the last active call you received among the multiple calls on the phone for recording.

Figure 11.    The IP phone screen while recording a call

```
14:23 02/15/13                    2101

☎ Caller Data - ID:2311              ☚

Layout: Default                      ☎

DNIS: 2101

ANI: 2301



◁ Talking: Rec
            Stats          Option
```

To stop recording a call:

1. Press the Option soft key on your IP phone. The Options menu appears.

2. Choose Stop recording from the menu. The "Rec" notification on the status line disappears, indicating that you have stopped recording the call.

NOTE: You cannot use the Stop recording option to stop a supervisor-initiated recording. This option only stops recordings that you have started.

Supervisor Intervention

If your contact center is using the Enhanced or Premium version of CAD, your supervisor can intervene in ACD and non-ACD calls you receive by performing any of the following:

- Monitor your ACD calls (and non-ACD calls, if enabled)
- Record your ACD calls (and non-ACD calls, if enabled)

Monitoring/Recording Notification

When your supervisor monitors or records your calls, you might or might not be notified, depending on how the system is configured. Notification can be turned on for recording only, monitoring only, or both.

If notification is enabled and your supervisor is monitoring and/or recording your call, one of the following abbreviations appears on the status line of your IP phone screen as shown in Figure 12:

- Rec (indicates recording)
- Mon (indicates monitoring)
- Rec/Mon (indicates recording and monitoring)

**Figure 12.** Caller Data screen showing call monitoring and recording
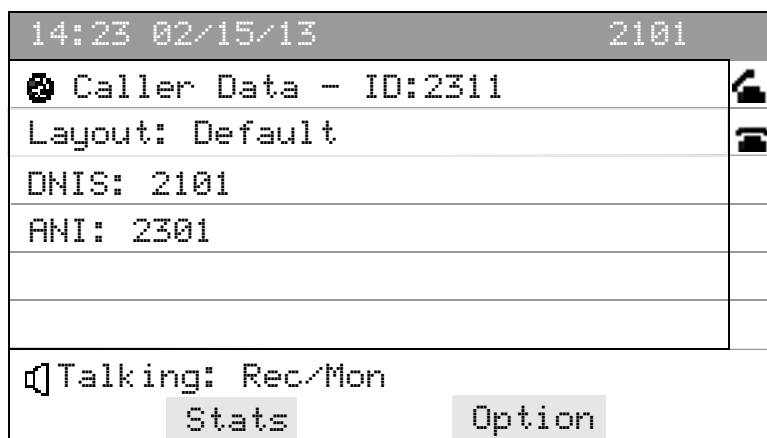
Logging Out

You can log out from any state.

To log out:

1. Choose Logout from the menu on your IP phone. If your system is configured to require reason codes, the reason code menu appears.

2. Choose the appropriate reason code. IPPA returns to the Login screen, and you are now logged out of the ACD.

Figure 13.   Error message after attempting to log into inactive service
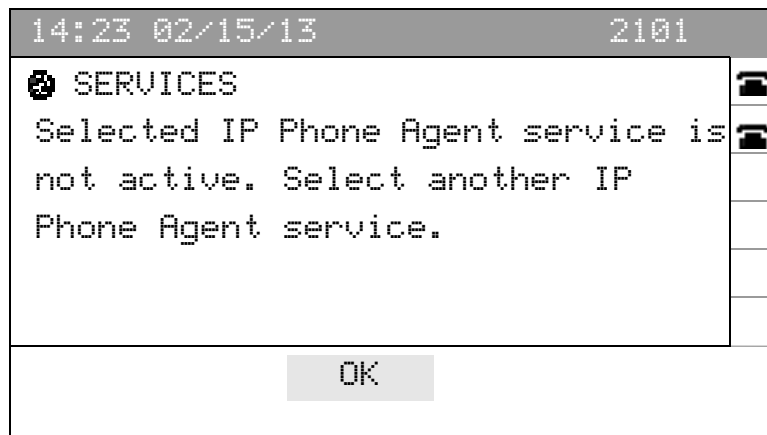
If you attempt to log back into the BIPPA service, you will see the Forced Login screen. The Forced Login screen usually indicates that someone else is already logged in with your agent ID or extension. In this case, however, the "someone else" is actually you, still logged into the Contact Center Express.

If you are on a call when the service fails, you cannot log back in until the call ends. The forced login function cannot log your agent ID or extension out of the Contact Center Express unless your agent state is Ready. When you are on a call, however, your agent state is Talking. You must wait until the call ends, when your agent state is set to Ready. Then you can choose the forced login option. Choosing this option logs you out of the Contact Center Express and then logs you back into the BIPPA service and the Contact Center Express.

If the connection between your IP phone and the Cisco CTI service is lost, your IP phone will also lose its connection with the BIPPA service. If you are on a call, you will not lose the call, although data associated with the call might be lost in the IPPA screen. You can attempt to log back into the BIPPA service any time during or after the call.

In the event of a service failure, the enterprise data displayed on the IPPA screen might be lost. If the Cisco Enterprise service fails, enterprise data might be lost between the time the data is sent and the call is delivered to your IP phone.

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