



## **Cisco IP Phone Agent User Guide**

CAD 8.5 for Cisco Unified Contact Center Express Release 8.5  
Cisco Unified Communications Manager Edition  
March 2012

### **Americas Headquarters**

Cisco Systems, Inc.  
170 West Tasman Drive  
San Jose, CA 95134-1706  
USA  
<http://www.cisco.com>  
Tel: 408 526-4000  
800 553-NETS (6387)  
Fax: 408 527-0883

THE SPECIFICATIONS AND INFORMATION REGARDING THE PRODUCTS IN THIS MANUAL ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL STATEMENTS, INFORMATION, AND RECOMMENDATIONS IN THIS MANUAL ARE BELIEVED TO BE ACCURATE BUT ARE PRESENTED WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. USERS MUST TAKE FULL RESPONSIBILITY FOR THEIR APPLICATION OF ANY PRODUCTS.

THE SOFTWARE LICENSE AND LIMITED WARRANTY FOR THE ACCOMPANYING PRODUCT ARE SET FORTH IN THE INFORMATION PACKET THAT SHIPPED WITH THE PRODUCT AND ARE INCORPORATED HEREIN BY THIS REFERENCE. IF YOU ARE UNABLE TO LOCATE THE SOFTWARE LICENSE OR LIMITED WARRANTY, CONTACT YOUR CISCO REPRESENTATIVE FOR A COPY.

The Cisco implementation of TCP header compression is an adaptation of a program developed by the University of California, Berkeley (UCB) as part of UCB's public domain version of the UNIX operating system. All rights reserved. Copyright © 1981, Regents of the University of California.

NOTWITHSTANDING ANY OTHER WARRANTY HEREIN, ALL DOCUMENT FILES AND SOFTWARE OF THESE SUPPLIERS ARE PROVIDED "AS IS" WITH ALL FAULTS. CISCO AND THE ABOVE-NAMED SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THOSE OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OR ARISING FROM A COURSE OF DEALING, USAGE, OR TRADE PRACTICE.

IN NO EVENT SHALL CISCO OR ITS SUPPLIERS BE LIABLE FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, OR INCIDENTAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOST PROFITS OR LOSS OR DAMAGE TO DATA ARISING OUT OF THE USE OR INABILITY TO USE THIS MANUAL, EVEN IF CISCO OR ITS SUPPLIERS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Cisco and the Cisco Logo are trademarks of Cisco Systems, Inc. and/or its affiliates in the U.S. and other countries. A listing of Cisco's trademarks can be found at <http://www.cisco.com/go/trademarks>. Third party trademarks mentioned are the property of their respective owners. The use of the word partner does not imply a partnership relationship between Cisco and any other company. (1005R)

Any Internet Protocol (IP) addresses used in this document are not intended to be actual addresses. Any examples, command display output, and figures included in the document are shown for illustrative purposes only. Any use of actual IP addresses in illustrative content is unintentional and coincidental.

*Cisco IP Phone Agent User Guide*

© 2010, 2012 Cisco Systems, Inc. All rights reserved.

© 2010, 2012 Calabrio, Inc. All rights reserved.

---

# Contents

---

## **Cisco IP Phone Agent User Guide 5**

- Introduction 5
  - What's New In This Version 5
  - Hardware and Software Environment 5
  - Obtaining Documentation and Submitting a Service Request 6
  - Documentation Feedback 6
- IP Phone Agent Feature Levels 7
  - Language Support 7
- The IP Phone Agent Screen 9
  - Soft Keys 9
  - Choosing Menu Options 10
- Logging In 11
  - Forcing a Login 13
- Call Control 14
- Contact Service Queue Statistics 15
  - Refresh Rate 15
- Caller Data 16
- Agent States 17
  - Changing Your Agent State 18
  - Changing Your Agent State While On a Call 19
- Reason Codes 20
- Wrap-up Data 21
- Agent-Initiated Recording 22
- Supervisor Intervention 24
  - Monitoring/Recording Notification 24
- Logging Out 25
- Fault Tolerance 26
  - Redundancy 26
  - Failover 26

---

# Contents

---

Index 29

---

# Cisco IP Phone Agent User Guide

---

## 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.

## What's New In This Version

- Support for ACD and non-ACD call appearances on phones
- Support for Russian on phones with ISO-8859-1 without Unicode escapes

## Hardware and Software Environment

For information about the hardware and software that is supported by Cisco IP Phone Agent, see the *Cisco CAD Installation Guide*.

## Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

<http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>

Subscribe to the *What's New in Cisco Product Documentation* as a Really Simple Syndication (RSS) feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service and Cisco currently supports RSS version 2.0.

## Documentation Feedback

You can provide comments about this document by sending email to the following address:

[ccbu\\_docfeedback@cisco.com](mailto:ccbu_docfeedback@cisco.com)

We appreciate your comments.

## 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 both 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		●
Supervisor barge-in		●
Supervisor intercept		●

## 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.

## 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.

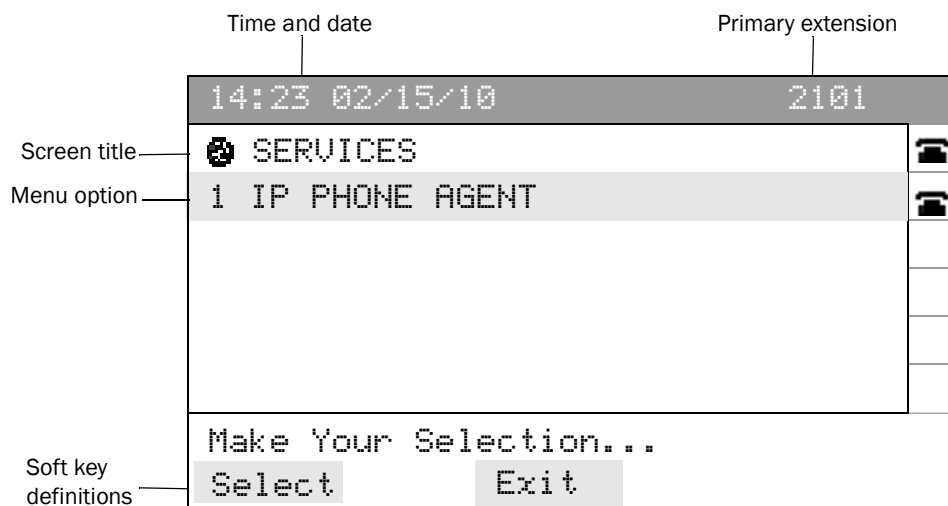
## Logging In

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

**To log in:**

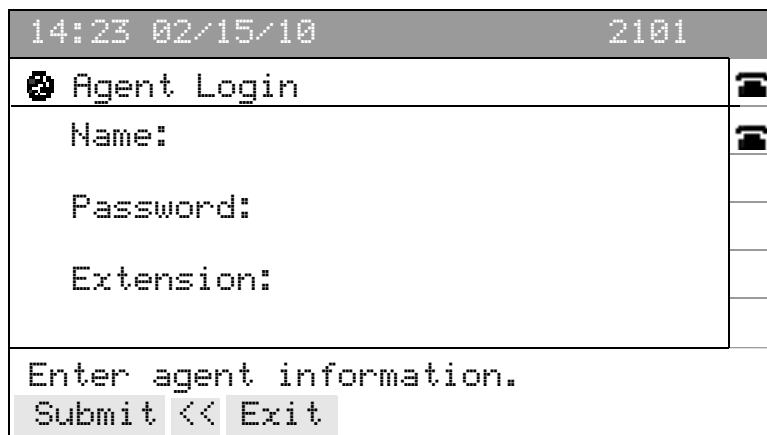
1. Press the Services button on your IP phone. The screen of your IP phone displays the Services menu as shown in [Figure 1](#).

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



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 02/15/10	2101
Agent Login	[Phone Icon]
Name:	[Phone Icon]
Password:	[Phone Icon]
Extension:	[Phone Icon]
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.) Press the number key until the desired character is highlighted. When you stop pressing the key, your choice appears in the field.

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

14:23 02/15/10	2101
Ⓢ Forced Login	☎
1 Name logged into another ext. Press '1' to log other agent out.	☎
2 Press '2' to log in with another name or extension.	
Select	Exit

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)

14:23 02/15/10	2101
CSQ Stats - ID:Jones	
Longest queue time: 00:08:15	
Calls queued: 10	
Not Ready	
Update	State CData

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.

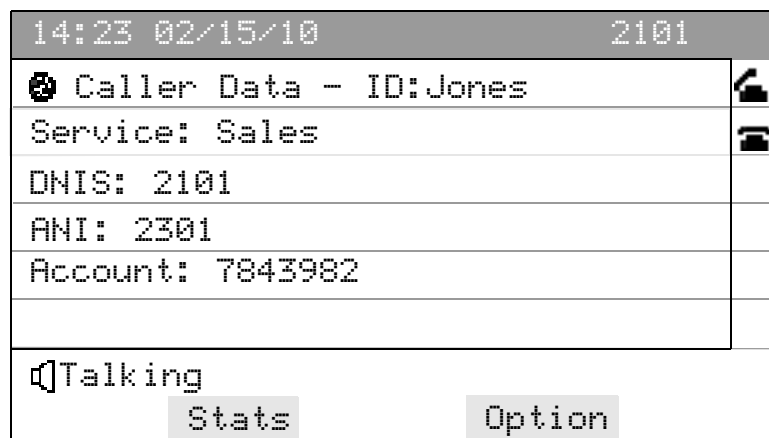
## Caller Data

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)



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 <sup>1</sup> 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.)

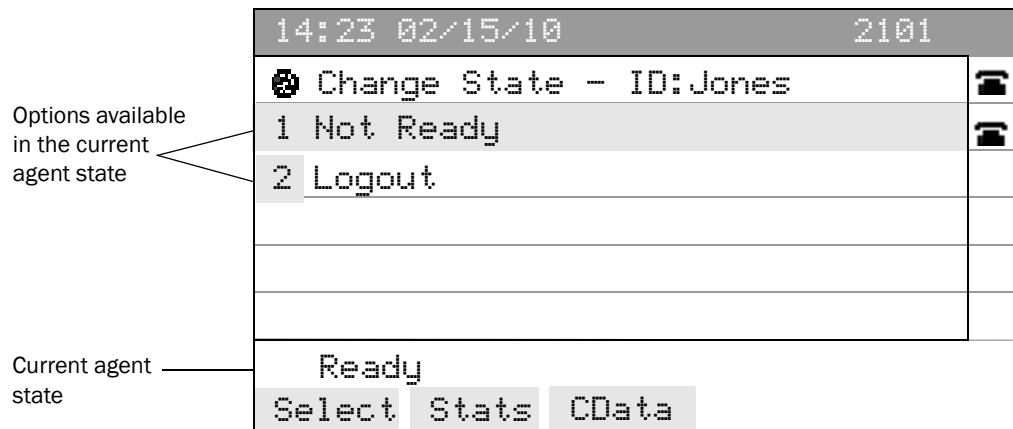
<sup>1</sup> A routed call is one that comes in through the ACD. A call to your direct phone number is a non-routed (or non-ACD) call, and not subject to these rules.

## 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



## Changing Your Agent State While On a Call

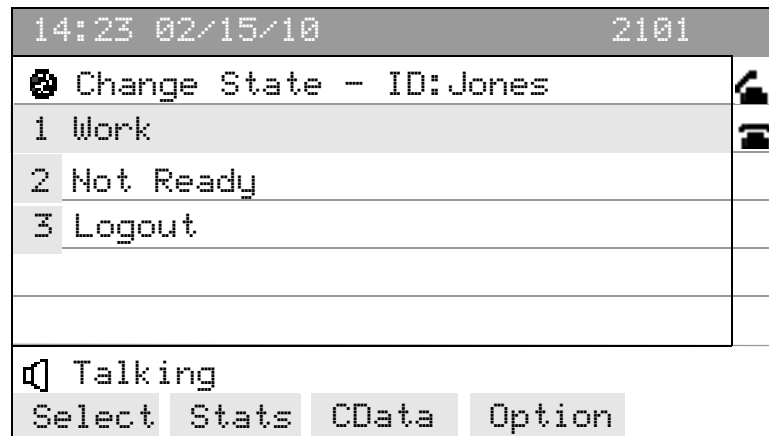
While you are on a call, IPPA displays the Caller Data screen. The menu you see displays the Stats soft key (and the Options soft key, if agent-initiated recording is enabled by the administrator). To change your agent state while you are on a call, you must navigate to the CSQ Stats screen and from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



## 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.

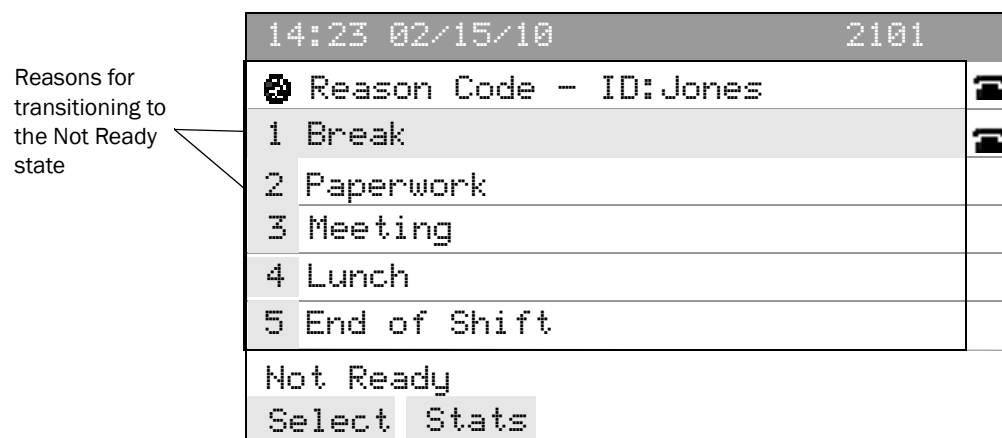
Figure 8 shows a Reason Code menu with sample reason codes. The reason codes that are displayed on your screen will differ.

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



## Wrap-up Data

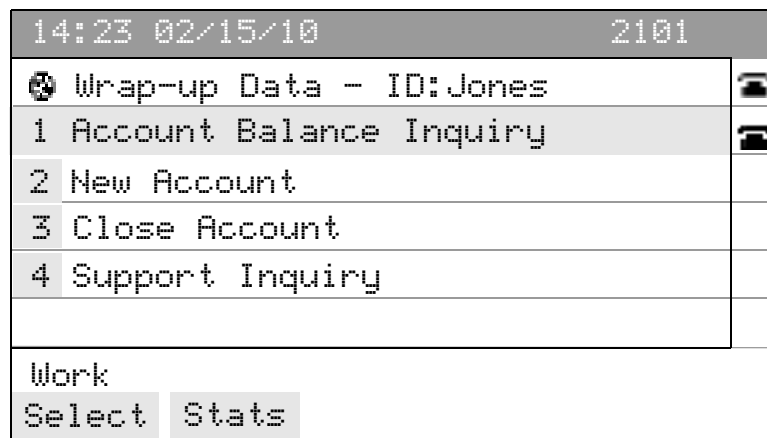
You might be required to enter wrap-up data when you change your agent state to Work. Wrap-up data are descriptions used by contact centers for such purposes as tracking the frequency of different activities or identifying the account to which to charge a call.

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)



## Agent-Initiated Recording

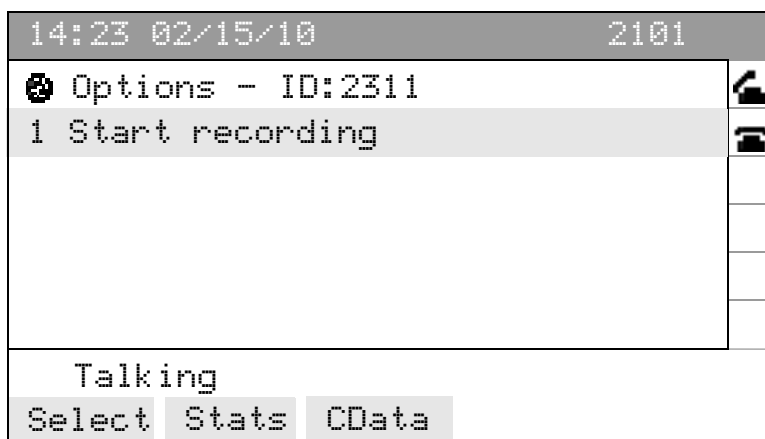
You can start and stop recordings of any ACD call you receive on your IP phone if you have the Enhanced or Premium version of IPPA and your administrator has enabled the agent-initiated recording feature. You can also record non-ACD call if enabled by your administrator.

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

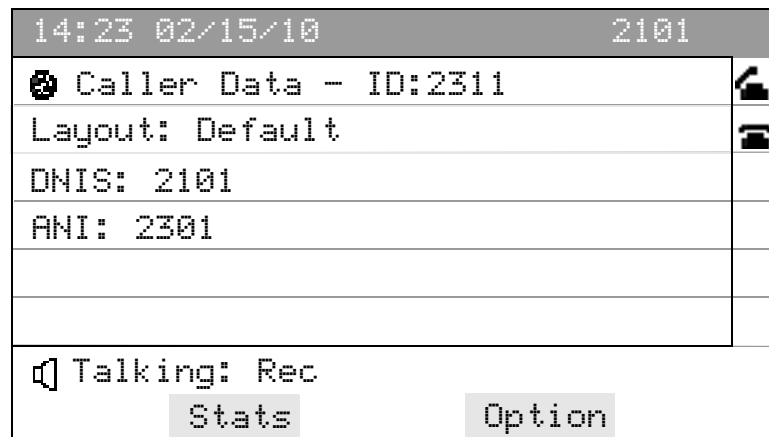


- Choose Start recording from the menu. “Rec” appears on the status line to indicate that you are recording the call as shown in [Figure 11](#).

**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



**To stop recording a call:**

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

- “Barge In” on a call—join your call with a customer in a forced conference
- “Intercept” a call—force a transfer of a customer call to oneself
- Monitor your ACD calls (and non-ACD calls, if enabled)
- Record your ACD calls (and non-ACD calls, if enabled)

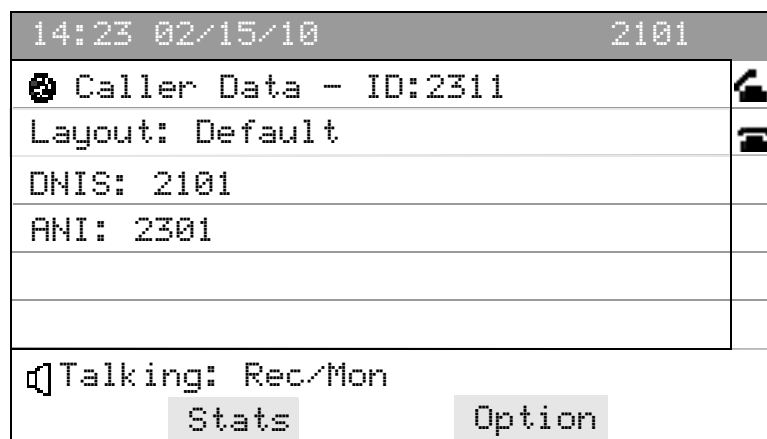
## Monitoring/Recording Notification

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.

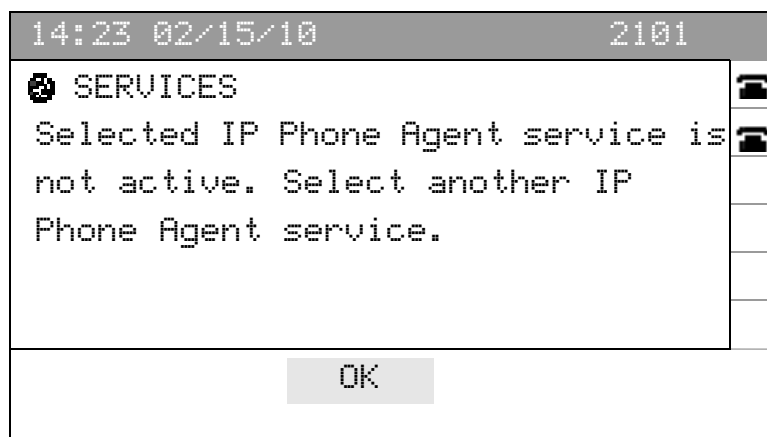
## Fault Tolerance

IPPA is fault tolerant if there are two Browser and IP Phone Agent (BIPPA) services on two different servers. If one server fails, the other server takes over. If the primary server fails, you are automatically logged out and you must manually log in to the secondary server.

## Redundancy

In a high availability system, the Services menu on your IP phone displays two IPPA services (if your administrator has configured them). Only one service can be active at any one time. If you attempt to log in to an inactive service, you will receive an error message to try another service as shown in [Figure 13](#).

Figure 13. Error message after attempting to log into inactive service



## Failover

If any of the CAD services fails in a high availability system, the backup service takes over after a complete failover of the engine occurs.

If the BIPPA service that you are logged into fails, you are logged out of the Cisco Chat service and you no longer appear as an agent in Cisco Supervisor Desktop. You are not notified, however, until one of the following events occurs:

- You make a request from your IP phone, for example by pressing the Update soft key or by changing your agent state.
- The IPPA screen is refreshed.

At this time, the following error message appears on your IP phone screen: “Unable to communicate with the IP Phone Agent service.” This message indicates that your IP phone is no longer communicating with the BIPPA service you logged into.

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 Cisco CTI service.

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 Cisco CTI service 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 Cisco CTI service and then logs you back into the BIPPA service, the Cisco Chat service, and the Cisco CTI service.

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 a high availability system, you can attempt to log into one of the backup BIPPA services.

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.



---

# Index

---

<b>A</b>	<b>L</b>
Agent state <ul style="list-style-type: none"><li>changing while on a call 19</li></ul>	Logging out 25
Agent State screen 18	<b>M</b>
Agent states 17 <ul style="list-style-type: none"><li>changing 18</li></ul>	Monitoring notification 24
Agent-initiated recording 22	<b>R</b>
<b>C</b>	Reason code screen 20
Caller data screen 16	Recording 22
Cisco IP Phone Agent <ul style="list-style-type: none"><li>agent states 17</li><li>feature levels 7</li><li>introduction to 5</li><li>logging in 11</li><li>logging out 25</li><li>selecting menu options 10</li><li>soft keys 9</li></ul>	Recording notification 24
Contact service queue (CSQ) statistics <ul style="list-style-type: none"><li>refresh rate 15</li></ul>	Refresh rate 15
Contact service queue (CSQ) statistics screen 15	<b>S</b>
<b>F</b>	Screen <ul style="list-style-type: none"><li>agent state 18</li><li>caller data 16</li><li>contact service queue (CSQ) 15</li><li>initial 11</li><li>reason code 20</li><li>wrap-up data 21</li></ul>
Feature levels 7	Selecting menu options 10
<b>H</b>	Soft keys 9
How to <ul style="list-style-type: none"><li>change agent state 18</li><li>change agent state while on a call 19</li><li>enter wrap-up data 21</li><li>log in 11</li><li>log out 25</li><li>record a call 22</li><li>select menu options 10</li></ul>	Supervisor intervention 24
	<b>W</b>
	Wrap-up data 21

