



Cisco Remote Expert Manager READ, eREAD, and mREAD User Guide

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Preface



Note

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Overview

This preface describes the audience, purpose, and organization of the *Cisco Remote Expert Manager READ, eREAD, and mREAD Guide*. It also provides information on related documentation. This preface includes the following sections:

- [“Introduction”](#)
- [“Audience”](#)
- [“Organization”](#)
- [“Related Documentation”](#)

Introduction

The Cisco® Remote Expert Agent Desktop (READ) and its web-based counterpart known as eREAD are applications for Cisco Unified Contact Center Enterprise (UCCE) and Cisco Unified Contact Center Express (UCCX) that enhance the collaborative experience between a customer in a branch office and an expert in a remote contact center office. READ and eREAD are used for RE immersive sessions, which are initiated from kiosks. Mobile customers can now connect and collaborate with experts using mREAD, the mobile version of eREAD.

The assumption in this document is that READ, eREAD, and mREAD are deployed along with Cisco Unified Communications Manager (CUCM) and either UCCE or UCCX.

Audience

This guide is intended primarily for remote experts and agents who will use either READ and eREAD.

Organization

This guide is organized into these chapters:

Chapter / Appendix	Title	Description
1	Remote Expert Agent Desktop (READ)	Explains how agents use the Cisco Agent Desktop (CAD) version of REM, known as READ, to conduct video calls with customers
2	eREAD	Explains how agents use the Cisco Finesse version of REM, known as eREAD, to conduct video calls with customers
3	READ and eREAD Collaboration	Provides instructions on how to use the various collaboration features including video streaming, document printing, scanning, LongPen, etc.
4	mREAD	Explains how agents can use Cisco Finesse to conduct a video call with a customer who is using a mobile device
A	Reference Links	Contains links to other related Cisco documentation
B	Acronyms	Contains explanations of acronyms used in this guide
C	Connected Justice	Provides instructions on how the judicial authority uses Next Available Interpreter and how the interpreter uses Click To Connect
D	Troubleshooting	Contains practical solutions for common troubleshooting issues

Related Documentation

These documents provide additional information about the Cisco Remote Expert Manager and Cisco solutions used with it:

Cisco Remote Expert Manager Agent Workstation Setup Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Cisco Remote Expert Manager Installation Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Cisco Remote Expert Manager Port Usage Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Cisco Remote Expert Manager Troubleshooting and Serviceability Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-troubleshooting-guides-list.html>

Cisco Remote Expert Manager Release Notes

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-release-notes-list.html>

Cisco Remote Expert Manager Migration Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Cisco Desktop Administrator User Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_8_5/user/guide/cda85ccxug-cme.pdf



Remote Expert Agent Desktop (READ)

September 23, 2015

Chapter Overview

Topics in this chapter include:

- [“READ Overview”](#)
- [“How to Use READ”](#)
 - [“Cisco CAD Toolbar”](#)
 - [“Not Ready for Calls \(Not Ready State\)”](#)
 - [“Ready for Calls \(Ready State\)”](#)
 - [“Receive a New Call \(Reserved State\)”](#)
 - [“Answer a Call \(Answer State\)”](#)
 - [“Disconnect a Call \(Dropped State\)”](#)
 - [“Log Out of READ \(Logout State\)”](#)

READ Overview

The Remote Expert Agent Desktop (READ) solution makes it easier for remotely-located experts or agents of an enterprise to collaborate with customers who are visiting a branch office of the enterprise. READ allows them to share documents and stream media files to a Remote Expert Interactive Applications Control (REIC), located at a branch office. The remote experts can also save session information for future reference when they assist the customer again.

READ includes the ability for the remote expert to do the following:

- Add customer records
- Take private or public notes for future reference
- Reference previously saved notes
- Stream video to a REIC at a branch
- Stream a selected on hold video to a REIC at a branch when the call is put on hold
- Preview selected videos

- View the status of the video being streamed
- Preview selected documents
- Preview documents from a local file system
- Print remotely at a branch printer connected to an IEC and view the status of the print job
- Share applications via a peer-to-peer connection
- Access LongPen tablets
- Provide session feedback
- Use a document camera
- Scan documents at the branch
- Capture signatures

How to Use READ

Cisco CAD Toolbar

The expert should be familiar with the following buttons within the Cisco CAD toolbar:

- Answer
- Call-on-hold
- Login
- Ready
- Not ready

Not Ready for Calls (Not Ready State)

When a remote expert launches the CAD client software, the CAD screen shows the state of the CAD in the upper left corner.

The **Not Ready** button appears with an orange background on the CAD toolbar to indicate the state of the call.

Ready for Calls (Ready State)

When a remote expert clicks the **Ready** button (the green traffic light icon on the toolbar) to begin accepting calls from customers, the READ welcome page displays.

Receive a New Call (Reserved State)

When the remote expert receives a new incoming call, the remote expert's state will change to reserved. In the reserved state, the main page of READ will appear.

Answer a Call (Answer State)

When the remote expert clicks the **Answer/Drop** button on the toolbar, the Direct Connect dialog box appears over the CAD window.

**Note**

When the Direct Connect application displays in the remote expert's active window, data sharing is disabled by default. See Chapter 3 for more information.

The call state events are displayed at the bottom of the screen and include the remote expert's user id, the dialed number, and the state.

Disconnect a Call (Dropped State)

When a remote expert finishes a call with the customer, the remote expert clicks the **Answer/Drop** button to disconnect the call.

The Direct Connect application closes and the web page shows that the call was disconnected and the expert returns to ready state. This is known as the dropped state.

Log Out of READ (Logout State)

Click the **Login/Logout** button to log out of READ. This is known as the logout state.



eREAD

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Chapter Overview

Topics in this chapter include:

- [“eREAD Overview”](#)
 - [“Cisco Finesse and Internet Explorer”](#)
- [“How to Use eREAD”](#)
 - [“Log into eREAD”](#)
 - [“Make a New Call”](#)
 - [“Receive a New Call”](#)
 - [“End a Call”](#)
 - [“Place a Call On Hold”](#)
 - [“Conference with Another Agent”](#)
 - [“Transfer Call to Another Agent”](#)

eREAD Overview

Just like READ, eREAD allows remote experts to share documents and stream media files to a REIC located at a branch office.

eREAD includes the ability for the remote expert to do the following:

- Add customer records
- Take private or public notes for future reference
- Reference previously saved notes
- Stream video to a REIC at a branch
- Stream a selected on hold video to a REIC at a branch when the call is put on hold
- Preview selected videos
- View the status of the video being streamed

- Preview selected documents
- Preview documents from a local file system
- Print remotely at a branch printer connected to an IEC and view the status of the print job
- Share applications via a peer-to-peer connection
- Access LongPen tablets
- Provide session feedback
- Use a document camera
- Scan documents at the branch
- Capture signatures

If using Cisco Finesse 10.5(1), eREAD is available in both English and Simplified Chinese.

Cisco Finesse and Internet Explorer

REM 1.9.6 supports Internet Explorer(IE)11 when Cisco Finesse is used on an agent's workstation.



Note

A proper CA certificate installed on the REM server is required for eREAD to populate in IE11.

Refer to the Cisco Finesse links below for information on supported browser versions and the steps for configuring IE browser settings to ensure all features of Cisco Finesse work properly.

- Cisco Finesse client requirements including supported platforms and browsers:

http://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cust_contact/contact_center/finesse/finesse_1051/release/notes/CFIN_BK_R34A18D2_00_release-notes-for-cisco-finesse-1051/CFIN_BK_R34A18D2_00_release-notes-for-cisco-finesse_chapter_00.html#CFIN_RF_HCBB012D_00

- Configuring IE browser settings for Cisco Finesse:

http://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cust_contact/contact_center/finesse/finesse_1051/user/guide/CFIN_BK_CF3279DF_00_cisco-finesse-desktop-user-guide-1051/CFIN_BK_CF3279DF_00_cisco-finesse-desktop-user-guide-1051_chapter_01.html#CFIN_RF_B8C90C29_00

How to Use eREAD

eREAD is a web-based application that provides the agent the ability to make and accept calls, conference in or transfer calls to other agents, and use collaboration widgets. In this section, you will learn the following:

- log into eREAD
- make a call
- receive a call
- end a call
- place a call on hold
- conference in another agent
- transfer a call

Log into eREAD

Follow the steps below to log into eREAD.

- Step 1** If you have Cisco Finesse 9.1(1), 10.0(1), or 10.5(1) using Cisco Unified Contact Center Enterprise (UCCE), open your web browser and type **https://[IP address]:8443/desktop** (for example, **https://135.4.27.134:8443/desktop**). If you have Cisco Finesse 10.0(1) using Cisco Unified Contact Center Express (UCCX), open your web browser and type **https://[IP address]:8445/desktop** (for example, **https://135.4.27.134:8445/desktop**).



Note If the customer is using the default setting for Cisco Finesse, Cisco Contact Center Enterprise (CCE) will use port 8443 while Cisco Contact Center Express (CCX) will use port 8445. Also, in the CCE setup, Finesse is a different VM. In CCX, on the other hand, Finesse is actually running on the CCX VM itself with a different port. However, those port numbers may be reconfigured to different ones, depending on customer's requirements. Check with your administrator for the correct port number.

The Cisco Finesse login page appears.

- Step 2** RE can be viewed in either English or Simplified Chinese. English is the default language. If you want to view the GUI in Simplified Chinese, use the language menu located on the right-hand side of the screen and choose Simplified Chinese.



Note The Simplified Chinese option is only available with Finesse 10.5(1).

- Step 3** Enter your agent ID number.

- Step 4** Enter your password.

- Step 5** Enter your extension number.

- Step 6** Click the **Sign In** button.

A secure connection message is displayed.

The next set of steps will enable the browser to trust the connection.

- Step 7** Right click on the READ page and open it in a different tab by choosing **Open Frame in New Tab**.

- Step 8** Go to the new tab and click **I Understand the Risks**.

- Step 9** Click **Add Exception**. The Add Security Exception dialog will appear.

- Step 10** Check the **Permanently store this exception** check box and click **Confirm Security Exception**.

READ loads in the tab.

- Step 11** Close the tab and go back to Finesse.

- Step 12** Right click on the READ page and choose **Reload Frame**.

The eREAD application opens. You will see the message “Select READY to be available for a session. In addition, your agent ID and extension number are displayed in the upper left corner of the application as well as the “Not Ready” state.

Make a New Call

If you want to make a call to another agent or a customer pod, follow these steps. This feature is used for scenarios such as when a customer has scheduled a call with you or you want to speak to another agent.

-
- Step 1** Choose the **Not Ready** state in the upper left corner of the application.
- Step 2** Click the **Make a New Call** button.
The phone book loads.
- Step 3** Choose a contact from the List of Contacts or enter an extension number using the keypad.
- Step 4** Click the green **Call** button within the keypad to place the call.
- Step 5** If the agent or customer pod answers, the call state in the upper left corner will change to “Talking”.

**Note**

If the agent or customer pod does not answer, you will see the message “Error Call could not be completed”. You can click the **Retry** button to place the call again or the **End** button to return to the previous screen.

Receive a New Call

To receive calls, your eREAD state must be “Ready”.

-
- Step 1** Choose **Ready** from the state drop-down menu at the upper left of the screen.
The “Welcome to the Remote Expert Agent Desktop” message will appear in the eREAD area of the screen.
- Step 2** When a call is placed to you, the screen will change and your state will change to “Reserved”.
- Step 3** Click the **Answer** button at the right side of the Call Variable bar.
The state changes to “Talking”.
-

End a Call

When you want to end a call, follow these steps:

-
- Step 1** To end a call, click the red **End** button.
-

Place a Call On Hold

Use the **Hold** button to place the call on hold. The On Hold video will be streamed to the customer pod until you click the **Retrieve** button to take the call off hold.

Conference with Another Agent

Follow these steps to conference in another agent during a call with a customer pod:

-
- Step 1** While in a call, click the **Consult** button.
 - Step 2** Choose the agent in the List of Contacts or enter the agent's extension or the IVR of the expert type group directly into the keypad.
 - Step 3** Click the green **Call** button.
A new Call Variable bar for the agent that you are trying to conference in appears and displays the "Dialing" message.
 - Step 4** When the call has connected, go to the Call Variable bar for the customer pod and click the **Conference** button.
 - Step 5** When you want to disconnect from the conference, click the red **Leave Conference** button.
-

Transfer Call to Another Agent

Follow these steps to transfer a call to another agent:

-
- Step 1** While in a call, click the **Consult** button.
 - Step 2** Choose the agent in the List of Contacts or enter the agent's extension or the IVR of the expert type group directly into the keypad.
 - Step 3** Click the green **Call** button.
A new Call Variable bar for the agent that you are trying to transfer to appears and displays the "Dialing" message.
 - Step 4** When the call has connected, go to the Call Variable bar for the customer pod and click the **Transfer** button.



Note The Direct Transfer button is not supported in REM 1.9.x.

You will be disconnected from the call.



READ and eREAD Collaboration

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Chapter Overview

Topics in this chapter include:

- “Collaboration Widgets”
 - “Customer Widget”
 - “Document Widget”
 - “Video Widget”
- “Additional Collaboration Features”
 - “VNC Co-browsing”
 - “Scan”
 - “Signature Capture”
 - “LongPen”
 - “Session Result”
- “Peer-to-Peer Sharing (Direct Connect)”
- “Document Camera”

Collaboration Widgets

When a remote expert answers the call, the eREAD or READ web page will display in the browser window and each of the widgets in the web page is catered for different functions. There are three widgets in the eREAD or READ web page: Customer, Document, and Video.

The eREAD or READ web page that displays when the remote expert answers the call is actually a mash-up of different widgets that corresponds to different features. The widgets can be expanded or minimized to make it easier for the remote expert to work with those widgets.

The Customer widget is located on the left side of the page; it captures customer interactions. The Document widget appears to the right of the Customer widget and contains thumbnails of files for the customer. The Video widget appears below the Document widget and contains thumbnails of videos for the customer.

Customer Widget

The Customer widget allows the remote expert to add a new customer, view existing customer information, create notes, and view previously saved notes.

When a new customer is created, the first name, last name, and the gender is collected to create a customer record that can be accessed when the same customer calls in the future.

If the customer is using a Keyboard or Card Reader module to initiate the call, the remote expert will receive a Card Number or Customer ID Number in the Customer widget when the call connects.

Add a New Customer Record

To add a new customer record, follow the steps below.

-
- Step 1** Click the **Add** button to open the Add Customer dialog box.
 - Step 2** In the Add Customer dialog box, enter the customer's first name and last name in the First Name and Last Name fields.
 - Step 3** Choose a Gender radio button.
 - Step 4** Click **Submit**.
-

Choose Customer

Once a customer record has been added to the database, the record can be retrieved by selecting the customer's name from the Choose Customer drop down menu. When a customer's name is selected from the list, all the information about the customer including the notes can be viewed.

Alternatively, the customer can be retrieved from the Choose Customer drop down menu by typing in a partial or full name. All customers matching the name are displayed in the list. The agent can then select the appropriate customer from the list.

View Previous Notes

Notes keep track of important information related to interactions with customers. Notes created from previous sessions can help the remote expert remember key points of past discussions with the customer in the past. This will improve the relationship with the customer and make managing the relationship easier.

There are two types of notes: Public and Private. The notes created as type PUBLIC will be visible to the customer when they login to the enterprise portal. The notes created as type PRIVATE are visible only to the remote experts within the enterprise. All the content in the notes are visible. The remote expert does not need to double click the notes to read their contents.

**Note**

Private notes are highlighted yellow so that remote experts can quickly differentiate them from public notes.

The remote expert can choose **Show Public**, **Show Private**, or **Show Both** from the drop down menu. Additionally, the remote expert can enter text into the Search field to find notes containing them.

Create a New Note

To create new notes, follow these steps:

-
- Step 1** Click the **New Note** button.
 - Step 2** In the Add Note dialog box, enter text in the Notes field.
 - Step 3** Check the **Is Private** check box to mark the note as private.
 - Step 4** Click the **Submit** button to save the note.
-

Document Widget

The Document widget holds the most frequently printed customer documents and prints them at the REICs for customers. The types of files supported in the Document widget are PDF, TXT, and image (jpg, jpeg, bmp, gif, and jfif.jpe) files.

The Remote Expert Manager (REM) manages REIC information such as the REIC that the customer call originated from and the peripherals that are connected to that Interactive Experience Client (IEC). When the remote expert wants to print a document for the customer, the REM sends the document to the printer connected to the USB port on the IEC where the customer has originated the call.

The remote expert can upload additional PDF, text or image files from their workstation, preview them, and then print them to the customer.



Note

Documents that are uploaded and printed from the remote expert's workstation will not be available in the Document widget pane for future use. Documents must be uploaded into the Remote Expert Admin Console (REAC). Refer to the *Cisco Remote Expert Manager Administration Guide* for more information on how to upload documents.

The Documents widget has three panes: a pane that lists all the documents available, the document preview pane, and a pane that indicates the job status.

Document Pane

The left pane shows all the server side documents available to the remote expert. If there are many documents in the window, the remote expert can use the Filter to search for specific documents.

Preview Local File

Agent can click on the **Preview Local File** button to access files on the agent's workstation and then click the **Print** button to send the document to the printer at the kiosk.



Note

Make sure the file name of the document does not contain any special characters if printing the document from the agent's workstation.

Document Preview Pane

The pane in the middle is for previewing the document. When a document is selected, a preview of its content is displayed in this pane. Previewing a document helps the remote expert determine if that document contains the desired content for printing to the customer REIC.

To view the document's content, the remote expert can use the side and bottom scroll bars or the View All button at the upper right corner of the Document Preview pane.

When the remote expert has chosen a document to print to the branch printer, the remote expert clicks the **Print** button at the bottom left side of the Document Preview pane. The branch printer is connected to an USB port on the Interactive Experience Client (IEC). The IEC sends queue information to the REM, which then displays it in the Job Status pane.

Job Status Pane

The right pane on the Document Widget contains the printing status of documents.

Once the print job is executed by the remote expert, it is not possible to cancel the print job (other than calling someone at the branch to disconnect the printer). The print status information is only available during an active session; once the call has been disconnected, the status information is no longer visible.

The following printing states are possible:

- In Queue: This state is displayed when the document is waiting to be printed.
- Printing: This state is displayed when the document is being printed.
- SUCCESS: This state is displayed when the document has printed.
- Printer Not Found: This state is displayed when an error occurred during printing such as when the printer is not connected to the setup or the printer does not have toner/ink.

Video Widget

The Video widget is used to:

- Push a video file to a REIC
- Select a video that will be streamed while a call is on hold

As with documents, video files must first be uploaded using the REAC before they will display in the Video widget pane. For information on how to upload them to the server, refer to the *Cisco Remote Expert Manager Administration Guide*.

There are three panes in the Video widget: the Video pane, the Video Preview pane, and the Video Status pane.

Video Pane

The left pane of the Video widget shows all the video files that have been uploaded into the Video tab of the REAC.

Video files can be searched by entering a partial or full name into the Filter field located at the top of the pane. All videos that match the search text will be displayed.

To stream the video to a REIC, follow these steps:

-
- Step 1** Select a video in the Video pane.
- Step 2** Click the **Stream** button.
- Step 3** If additional video files should be streamed, select another video and click the **Stream** button again.
-

This pane is also used to choose which video will be streamed to the REIC if the remote expert places the customer call on hold. In the REM, the administrator can select a default video to stream when any remote agent places a call on hold. In the Video pane, that video's name is highlighted yellow and the red Set Hold Video icon appears next to the name of the video.

The remote agent can choose a different video to stream based on the needs and interests of the customer. To choose a different video file to stream while the current customer is placed on hold, follow these steps:

-
- Step 1** Select a video.
- Step 2** Click the **Set Hold Video** button.

The thumbnail of the video file is highlighted yellow and the Set Hold Video icon appears next to the video name to differentiate the file from the rest of the video files.

When the remote expert places the call on hold by clicking the **Hold** button, eREAD or READ disables audio streaming and streams the video file to the REIC. The On Hold video is not placed in the queue of the Video Status pane.

**Note**

The document and video panes are disabled when the call is placed on hold. Only the customer notes pane is enabled. All three panes will be re-enabled when the expert takes the call off hold.

Video Preview Pane

The remote expert can preview a video in the Video Preview pane before streaming it to the REIC.

When the remote expert selects a video in the video list pane, the video appears in the preview pane. The preview window contains a video player to play and stop the video, maximize the player, and control the volume. To preview the video, the remote expert clicks on one of the play buttons (either the arrow in the video player toolbar below the video or the arrow that appears on top of the video).

Video Status Pane

After the **Stream** button is clicked, the video name and its streaming status appears in the Video Status pane. Unlike a print job, video streaming can be stopped by clicking the **Stop** button in the Action column.

If multiple videos were chosen for streaming, all the video names appear in the Video Status pane in a queue. The queue indicates which video is currently being viewed by the customer at the REIC. After streaming the first video, the next video in the queue will be streamed. The status types are:

- To Be Viewed
- Viewing

- Viewed
- Paused
- Stopped

If the remote expert stops the first video stream, the second video will start streaming automatically. The remote expert can stop any video from streaming by clicking the **Stop** button beside it. Stopped videos show the status as “Stopped” in the Video Status pane.

If video is being streamed and a Direct Connect application share is initiated, the video which is currently being streamed is stopped and the status in the streaming videos pane is shown as “Stopped”.

**Note**

The video will not stream for the remote expert. However, the remote expert can preview the same video file if necessary in the Video Preview pane.

Additional Collaboration Features

In addition to the various widgets mentioned above, eREAD and READ have the following collaboration features:

- VNC Co-browsing
- Scan
- Signature Capture
- LongPen
- Session Result

**Note**

The **Force Cancel** button that appears alongside the collaboration buttons can be used to cancel a collaboration job if it hangs despite attempts to exit the collaboration feature.

When the collaboration features have been engaged, no other collaboration features can be used except for the widgets. For example, if you have turned on the signature capture, you cannot scan a document but you can print a document. Similarly, if you have turned on the scanner, you cannot capture a signature or stream a video. All the additional collaboration buttons can be disabled in eREAD and READ. Please refer to the *Cisco Desktop Administrator User Guide* on how to turn the features off.

VNC Co-browsing

Co-browsing allows the agent to view the customer’s screen so they can assist customers by navigating the application, completing transactions, or filling out forms. With VNC co-browsing, the customer still has the ability to control the application if the customer desires.

Follow these steps to activate co-browsing:

-
- Step 1** Click the **VNC Co-browsing** button on eREAD or READ.
 - Step 2** In the pop up dialog box, click the **Start Remote Share** button.
 - Step 3** In the VNC Remote Sharing dialog box, click **OK**.

- Step 4** Follow these steps to view the customer’s application:
- When the “Allow REM_IP to run “Java Platform SE 7 U”?” message appears on top of the web page, click the **Allow** button.
 - Click the **Allow and Remember** button.
 - When asked “Do you want to Continue?”, click **Continue**.
 - When asked “Do you want to run this application?”, check the **I accept the risk and want to run this application** check box and then click the **Run** button.



Note REM supports SSL certificates to eliminate the security pop-up windows when starting a VNC co-browsing session. Please contact your system administrator for more information.

The application on the customer’s side appears in a window.

- Step 5** Navigate the application along with the customer.
- Step 6** When you have finished co-browsing, click the **End Remote Share** button.

Scan

The customer can place a document in the scanner in the customer pod and you can scan the document so you can see it on your desktop.

Follow these steps to scan a document at the customer pod:

- Step 1** Ask the customer to place the document in the scanner.
- Step 2** Click the **Scan** button on eREAD or READ.
- On the agent’s side, the Scan Controller dialog box opens in eREAD or READ.
- On the customer pod, the customer sees a dialog box with a **Start Scan** button.
- Step 3** Now you will take control of the customer pod screen. In the Scan Controller dialog box, click the **Take Control** button.
- The **Scan** button is activated and the customer sees the “Please wait, Now the Agent controlling the scanner” message.
- Step 4** Click the **Scan** button.
- Step 5** Click **OK** in the Scan dialog box to accept that the command has been successfully sent to the customer pod.
- The customer will see the “Now the Agent is Scanning the Document” message.
- When the scan has completed, the “Scan Complete. Please Wait for Agent to download and view the document” message appears
- Step 6** Click **OK** in the Scan pop up box when notified that the scan is complete.
- The **Get Image** button is activated in the Scan Controller dialog box.
- Step 7** Click the **Get Image** button.
- Step 8** Click **OK** in the Scan dialog box to accept that the command has been successfully sent to the customer pod.

On the customer pod, the dialog box closes and the customer sees the logo.

The scanned document appears in the web browser.

Step 9 Click **Open** or **Save** to view or save the document to your desktop.

Step 10 Click **Close** to exit Scan.



Note You will need to close scan in order to use any of the other collaboration features.

Signature Capture

The customer's signature can be captured for contracts or verification. The customer will use their finger or stylus to sign the touchscreen depending on the capabilities of the touchscreen. An image of that signature is then sent to the agent.



Warning

Cisco does not guarantee that any digital signatures captured using Remote Expert can be used for legal documents in all countries. Check with your local laws.



Warning

The signature captured should be safeguarded to protect the person who signed it. Check with your local laws as to safeguarding digital signatures. Cisco accepts no responsibility for the misuse of any signatures captured.

Follow these steps to capture a signature at the customer pod:

Step 1 Click the **Signature Capture** button on eREAD or READ.

The Signature Capture dialog box opens on the customer pod's touchscreen.

Step 2 Ask the customer to sign the touchscreen with his or her finger or a stylus if the touchscreen supports it.

Step 3 If the customer is satisfied with the signature, ask the customer to click the **Send** button. If the customer is not satisfied with the signature, ask the customer to click the **Clear** button and then sign the touchscreen again.

The customer's signature will be transmitted to the agent and will appear in READ or eREAD. On the customer pod, the dialog box will automatically close.

Step 4 Once you see the image of the signature, click **Download** and then **Save** to save the image of the signature to your desktop.

LongPen

When you click the LongPen icon in the status bar, the LongPen tablet status dialog box is displayed.

If you want to lock the writer and tablet, follow these steps:

-
- Step 1** Click the **LongPen** button.
- After the LongPen widget opens, an **Unlocked** icon will appear under the Writers area. The status will be indicated as “Idle”.
- Step 2** Click the **Unlocked** icon to reserve the writer and tablet.
- The writer status will change to “Wait ...” and then become “Reserved”. The Unlocked icon turns to a Locked icon. The tablet status shows it is “connected”.
- Step 3** Click the green **Start** icon at the bottom right of the dialog box to start the signing session. The message “Session has been started” will be displayed in a pop-up dialog box.
- Step 4** Click OK to close the pop-up dialog box.
- Step 5** Look at the tablet at the customer pod. Verify that it is showing the “Signing” screen.
- Step 6** Test the tablet by signing your name on the tablet and clicking the **Send** button.
- The writer will start signing automatically.
- Step 7** After the writer has completed signing, click the red icon on the LongPen widget.
- The “Session has been completed” message will be displayed in a pop-up dialog box.
- Step 8** Click **OK** to close the pop-up dialog box.
- The writer and tablet will go back to the Idle state. This complete the signing session.
- Step 9** If the Unlocked icon does not show on the widget, click the **Refresh** icon at the bottom left of the dialog box to refresh the writer and tablet status.
-

Session Result

When you click the Session Result icon, the Submit Session Result dialog box is displayed. All the questions added as a part of REAC Session Result tab (Agent Questionnaire) are displayed here.



Note Questions can be either free text (where an agent can write descriptive responses) or multiple choice.

To configure Session questions which would appear on clicking Session Result button, follow these steps:

-
- Step 1** Using a supported web browser, navigate to REAC at https://<server_ip>:8443/reac.
- Step 2** Click the **Session Result** tab and choose **Agent** and then choose **Questionnaire**.
- Step 3** Click the **Add** button to add a question.
- Step 4** Choose the question type as either **Multiple Choice** or **Free Text**.
- Step 5** Enter the question text.
- Step 6** Save the question.
- Step 7** In case of multiple choice questions, select the question and click **Add Answer**.
- Step 8** Add answers and save them.



Note Any number of answers can be added to a question.

When you select the Session result button in eREAD or READ, all the questions under the Agent feedback questionnaire will appear.

Peer-to-Peer Sharing (Direct Connect)

The Remote Expert Solution uses the Direct Connect application to enable bi-directional sharing between the customer and the remote expert.

If the agent is using READ, the Direct Connect application is launched in CAD when the remote expert receives a call from a customer. If the agent is using eREAD, Direct Connect will not automatically launch; the agent will need to manually launch it during the call.

**Tip**

Agents who are using eREAD should create a desktop shortcut for Direct Connect so that they can quickly launch it when they need it during a call.

The Direct Connect dialog box opens.

The remote expert must click the **Connect** button on the Direct Connect dialog box to start sharing. The REM then sets up a audio and video conferencing session between the customer REIC and the remote expert's workstation. Once the session has been established, the Client Status radio button turns green.

By default, nothing is being shared, which is indicated by the selection of the "None" radio button. All the active applications that are currently running on the remote expert's workstation will appear as radio buttons in the Sharing area of the Direct Connect dialog box. The remote expert clicks on the radio button of the desired application to share that application with the customer at the REIC.

When an application has been selected for sharing, the application's window will appear as the active window on the remote expert's workstation. The color of the application window turns green to indicate that it is active.

A snapshot of that application is also shown in the Remote View Mirror area of the Direct Connect dialog box to confirm that the REIC is actually showing that application.

Sharing the application does not automatically enable bi-directional peer-to-peer sharing. The remote expert must first check the **Allow Interaction** check box to enable bi-directional sharing between the customer and the remote expert. Since the REIC contains a touch screen, the customer can select any part of the shared screen with their finger.

When any of the other windows on the remote expert's workstation becomes the active window, the shared application window turns red. When it is turns red, peer-to-peer sharing is placed on hold. The customer will still be able to see the shared application on the REIC but will not be able to interact with the application as before.

The remote expert ends the sharing session by clicking the **Disconnect** button. The Client Status button turns red to indicate that there is no active sharing session between the customer REIC and the remote expert's workstation.

**Note**

Application sharing using Direct Connect takes precedence over video streaming. If video streaming had already started or the caller was placed on hold to stream video, when the Direct Connect application is shared the video streaming stops and the shared application is displayed on the REIC. When the customer is put on hold during application sharing, Direct Connect is disconnected and the on hold video is streamed to the REIC. If the agent wants to share an application after the call is resumed, the agent must repeat the steps to share an application.

Document Camera

A document camera can be mounted in the ceiling above the customer pod. This camera can be used to view live video of a document that the customer has brought to the RE session. A snapshot can then be taken of the document. Taking a snapshot of a document is a faster method for the agent than scanning a document.

The agent can control the document camera in the following ways:

- Turn the document camera on or off
- Turn the laser pointer on and off
- Zoom the document camera in or out
- Select different presets corresponding to zoom positions
- Enter a prefix for the snapshots
- Take a snapshot
- View the snapshot
- Rename the snapshot file
- Copy the snapshot to your clipboard
- Delete snapshots

**Note**

Snapshots are stored on the agent's workstation not a server.

The document camera application must already be installed on the agent's desktop and a shortcut to the application should be made available on the desktop for the agent to quickly launch the application.

If the agent wants to view a customer's document during a RE session and take a snapshot, follow these steps:

- Step 1** Click the shortcut for the document camera on your desktop. The Document Camera application opens.
- Step 2** Enter your directory number (extension) in the Directory Number field.
- Step 3** Click the **Start Camera** button to turn the camera on the customer side.
- Step 4** Ask the customer to place the document under the document camera.
- Step 5** When prompted to wait while the image is streamed, click **OK**.
- Step 6** Once the image is visible in the upper window, you can use the laser pointer to pinpoint an exact point on the document. To turn on the laser pointer, click the **Laser On** button.



Note When you are finished using the laser, click the **Laser Off** button, which is located next to the Laser On button.

There are three methods for zooming in and out the camera:

1. Zoom Control buttons: These include the Zoom In and Zoom Out buttons as well as a drop-down menu with predefined granular zoom levels including 2x, 4x, 10x, and 15x.
2. Custom Zoom buttons: These buttons can be preset by the agent.
3. Predefined Zoom buttons: These buttons are preset by the administrator.

- Step 7** Use the Zoom In and Zoom Out buttons to view the document's text at the desired size. Or choose a granular zoom level such as 2X or 10X from the drop-down menu.
- Step 8** If you want to preset zoom positions, zoom to the desired enlargement and then click one of the **Preset** buttons. Then to use a preset zoom position, click the **Execute** button next to it.
- Step 9** Alternatively, you can use the predefined buttons that were programmed by your RE administrator. These typically are for specific sized documents such as driver's licenses, letter and/or legal, A3 or A4, etc.
- Step 10** Before you take a snapshot, you can define the file's prefix to help you with organizing your snapshots. Enter text in the Image Prefix field such as the customer's name.
- Step 11** When you have zoomed in to the desired distance, turned the laser on or off, and chosen a prefix, click the **Capture Snapshot** button. The snapshot will appear in the lower window.
- Step 12** Click the lower window to view the snapshot in full screen. Close the full screen view by clicking the X button in the upper right corner of the window.



Note You can also right-click the lower window and choose **View full screen**.

- Step 13** If you want to copy the image to the clipboard, right-click on the image and choose **Copy to clipboard**. You can change the file name. By default, the name of the file consists of the following:
- prefix (if configured)
 - agent's directory number
 - date
 - time
- Step 14** To rename the image file, double-click the file name and then enter the desired file name.
- Step 15** If you want to delete an image from the application, click the image file and choose **Delete** or press the Delete key on your keyboard.
- Step 16** When you no longer want to use the document camera, click the **Stop Camera** button.



Caution Only use the **Force Cancel** button if the application is not responding to commands such as if the camera has frozen after pressing a zooming button multiple times. Provide an explanation of the problem in the Cancel Job dialog box.

- Step 17** Click the X button at the upper right corner to close the Document Camera application.
-



mREAD

September 23, 2015

Chapter Overview

Topics in this chapter include:

- [“Mobile Advisor Overview”](#)
- [“mREAD Overview”](#)
- [“Using mREAD”](#)
 - [“Log into mREAD”](#)
 - [“Answer a Call”](#)
 - [“Start Collaboration”](#)
 - [“Share Documents”](#)
 - [“Share Links”](#)
 - [“Control the Web Page”](#)
 - [“Make Annotations”](#)
 - [“Conference, Transfer, and Hold”](#)
 - [“End Collaboration”](#)
 - [“Disconnect a Call”](#)
- [“Mobile Customer Video Call Scenario”](#)

Mobile Advisor Overview

Cisco Mobile Advisor is integrated with Cisco Remote Expert Manager. This enables organizations with an REM instance to turn impersonal transactions into personal interactions by conducting video sessions between their experts and customers who have a browser on their mobile devices or PCs.

Since Cisco Mobile Advisor gives customers the freedom to conduct business with experts anywhere, anytime, and on any device, its integration with REM will allow customers to easily move from branch to mobile interactions as they wish. As a result, it will strengthen existing customer relationships with a consistent video-enabled mobile experience and create a long-lasting loyal customer base.

mREAD Overview

mREAD is a page in Cisco Finesse. When a mobile call is made to the agent, REM can distinguish it from a call made by an RE kiosk (i.e. an immersive session) and thus displays the mREAD page rather than the eREAD page.

mREAD has the following features:

- Start and End Collaboration buttons
- Share documents that were added to REAC
- Share web pages whose links were added to REAC
- Draw free-hand annotations such as arrows and circles that will be seen on the customer's screen
- Take control of the web page that the customer used to initiate the call to control the navigation of the web site

The left side of the mREAD page displays what is being seen by the customer.

The right side of the mREAD page contains the Document and Links tabs. Within these tabs are the document and web links that can be shared with the customer. These documents and web links are added to REAC by the administrator.

The center of the mREAD page contains the Start Collaboration and End Collaboration buttons in addition to the Draw, Control, and Clear buttons. The **Draw** button allows the agent to draw on the screen and it will be seen by the customer. The **Clear** button deletes anything drawn. The **Control** button allows the agent to take control of the web page that the customer is viewing on the mobile device and then click on its links to show the customer where to navigate within the website to perform desired tasks or find information about a topic.

Using mREAD

Log into mREAD

-
- Step 1** Log into Cisco Finesse just as you would when you use eREAD to answer a call from a kiosk.
- Step 2** Then choose **Ready** so that you can start accepting calls.
-

Answer a Call

-
- Step 1** When you receive a call, click the green **Answer** button in the upper right corner. The mREAD page loads.
-

Start Collaboration

-
- Step 1** Before you can share documents or links with the customer, you will need to start collaborating. Click the **Start Collaboration** button.
- The collaboration window appears on the left side of the page. It contains the content that the customer is currently viewing on their browser.
- In the middle section of the page are the **End Collaboration**, **Control**, **Draw**, and **Clear** buttons.
- To the right of the page are the **Documents** and **Links** tab.
- The windows agent video and Video Chat windows are draggable.
-

Share Documents

Documents can be shared with the mobile customer. These documents must first be added by the administrator to the REAC.

-
- Step 1** Choose a document in the **Documents** tab to share it with the customer.
- The shared document will appear on the left side of the mREAD page and will be pushed to the customer's browser for co-sharing.
-

Share Links

You can also share quick links to your company's website or application with the mobile customer. External web links cannot be shared with mobile customers.

As with the documents, these quick links are added by your RE administrator to REAC.

**Note**

Link co-sharing on the customer's browser or mobile application only works if the HTML or application code includes the Mobile Advisor libraries. Only webpages which have the libraries, will be able to participate in co-sharing. The libraries should be included in the HTML header across all webpages of the co-shared website. If the agent or customer clicks on a link that does not have the Mobile Advisor libraries while co-sharing, all collaboration will stop.

**Tip**

While co-sharing, do not click on a link that does not have the Mobile Advisor libraries. Otherwise, all collaboration will stop.

-
- Step 1** Click the **Links** tab
- Step 2** Choose a link.

The web page will appear on the left side of the mREAD page and will be pushed to the customer's browser for co-sharing.

Control the Web Page

The agent can take control of the web page that the customer used to initiate the call. The agent can then give the customer a tour of the web site in order to show the customer where he or she can find information on a specific topic, fill out a form, view their past activity, change their contact information, order products, watch a video, register for a seminar or webcast, etc.

- Step 1** Click the **Control** button.
The cursor control changes to a pointer.
- Step 2** Go to the collaboration window on the left side of the mREAD page. You can now navigate the web site on the customer's browser.
-

Make Annotations

You can draw freehand on the collaboration window to show the customer where a particular object or text is located on the web page or document. The customer will see these annotations on their browser. For example, you can draw an arrow to point to a button or link that they will need to click in order to perform a task. Or you can circle a section in the document that you want the customer to read or the fields in a form that are mandatory.

- Step 1** Click the **Draw** button to activate the pen.
- Step 2** Draw within the collaboration window. The customer will see your annotations.
- Step 3** Click the **Clear** button to remove the annotations.
-

Conference, Transfer, and Hold

As with eREAD, an agent using mREAD can conference with another agent, transfer the call to another agent, or put the call on hold. If you would like to use these functions, refer to the instructions in Chapter 2.

End Collaboration

- Step 1** When you are finished sharing links and documents, click the **End Collaboration** button.
-

Disconnect a Call

- Step 1** When you are finished speaking with the customer, click the red **End** button located in the upper right corner of the page. This will disconnect the video call.

Mobile Customer Video Call Scenario

The following scenario explains how a customer interacts with Mobile Advisor and how the agent interacts with mREAD when the mobile customer initiates a call using a mobile device or PC.

Table 4-1 *Mobile Call Scenario*

Step	Customer-side (Mobile Advisor)	Agent-side (mREAD)
1	Using the customer's mobile device or PC. The customer opens an application on their iPad or opens the Google Chrome browser on their PC. The customer enters the URL of organization's website.	The agent logs into Cisco Finesse and chooses "Ready" for the call state.
2	Customer logs into the application or website (or registers if he or she does not already have an account) to browse organization's information or check account information.	
3	Customer clicks the Call for assistance button.	The call is queued and sent to the first available agent.
4		In mREAD, the agent sees a pop-up window notifying him or her that a customer is calling. The agent clicks the Answer button to accept the video call.
5	A video chat window appears on the customer's mobile device or PC. The customer can now see and hear the agent.	The customer appears on the agent's TelePresence video endpoint. The mREAD page loads.
6	The customer clicks the Initiate Collaboration button.	The agent clicks the Start Collaboration button to enable sharing of documents and links.
7	The customer views the web pages and documents that are being shared by the agent.	The agent shares web links and documents.
8	The customer views the annotations.	The agent draws annotations on the web pages or documents that are being shared.
9	The customer views what the agent wants to show the customer after taking control of his or her mobile device or PC.	If the customer gives the agent control of his or her mobile device or PC, the agent can view its application in mREAD and make annotations on the customer's screen.

Step	Customer-side (Mobile Advisor)	Agent-side (mREAD)
10	The customer ends the collaboration session by clicking the End button on the collaboration window.	The agent ends the collaboration session by clicking the End Collaboration button.
11		The agent can end the call by clicking the End button in Finesse.



Reference Links

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Appendix Overview

This appendix contains links to related documentation.

Reference Links

The following are reference links to documentation that supports topics related to REM.

Cisco Agent Desktop for Cisco Unified Contact Center Express 8.5:

http://www.cisco.com/en/US/prod/collateral/voicesw/custcosw/ps5693/ps427/data_sheet_c78-627272_ps1846_Products_Data_Sheet.html

Cisco CAD Installation Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_8_5/installation/guide/cad85ccxig-cm.pdf

Cisco Desktop Administrator User Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_8_5/user/guide/cda85ccxug-cme.pdf

Cisco Agent Desktop User Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_8_5/user/guide/cad85ccxug-cm.pdf

Cisco CAD Troubleshooting Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_8_5/troubleshooting/guide/cad85ccxtg-cm.pdf

Cisco Unified Contact Center Express Troubleshooting TechNotes:

http://www.cisco.com/en/US/products/sw/custcosw/ps1846/prod_tech_notes_list.html

Cisco Finesse 9.1(1) Installation and Getting Started Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/finesse/finesse_911/installation/guide/CFIN_BK_UFD3A6DA_00_installation-and-getting-started-911.pdf

Cisco Finesse 9.1(1) Administration and Serviceability Guide:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/finesse/finesse_911/user/guide/CFIN_BK_F271B138_00_finesse-admin-and-serviceability-911.html

Cisco Remote Expert Manager Installation Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Cisco Remote Expert Manager Port Usage Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Cisco Remote Expert Manager Administration Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-maintenance-guides-list.html>

Cisco Remote Expert Manager Troubleshooting and Serviceability Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-troubleshooting-guides-list.html>

Cisco Remote Expert Manager Release Notes

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-release-notes-list.html>

Cisco Remote Expert Smart Solution Migration Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>



Acronyms

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Acronyms

The following acronyms are used in this guide:

- CUCM – Cisco Unified Communications Manager
- eREAD – Remote Expert Agent Desktop that uses Cisco Finesse
- IEC – Interactive Experience Client
- IVR – Interactive Voice Response
- REAC – Remote Expert Admin Console
- READ – Remote Expert Agent Desktop that uses Cisco Agent Desktop
- REIC – Remote Expert Interactive Applications Control
- REM – Remote Expert Manager
- UCCE – Cisco Unified Contact Center Enterprise
- UCCX – Cisco Unified Contact Center Express
- UID – User ID
- VNC – Virtual Network Computing



Connected Justice

September 23, 2015

Appendix Overview

This appendix explains how to use Connected Justice. Court officials will use the Next Available Interpreter. Interpreters will use Click to Connect.

Topics in this appendix include:

- [“Connected Justice”](#)
 - [“Next Available Interpreter \(NAI\)”](#)
 - [“Click To Connect \(CTC\)”](#)

Connected Justice

Connected Justice (CJ) is an extension of Remote Expert Manager (REM). It includes two primary features: Click to Connect and Next Available Interpreter.

Next Available Interpreter (NAI)

The NAI feature has a specially designed user interface for the judicial authority. Court officials, such as judges or court clerks, are able to use a Remote Expert Interactive Console (REIC) in the courtroom to initiate an interpretation session to the next available language interpreter.

The REIC will display up to six languages queues with each language having its own button.

When the REM detects a call established between the court room and the interpreter, the NAI loads the IP phone dialing extensions of that court room into the desk phone of the interpreter via the Extension Mobility API. This allows the interpreter to call the court room directly and speak to the judge or if the interpreter has a question about what he or she is being asked to translate.

Click To Connect (CTC)

The CTC feature provides an easy-to-use user interface to communicate between the court rooms and the remote interpreters. The CTC interface is accessed by the interpreters when they have a scheduled appointment to translate during a trial or other court proceedings.

When the interpreter selects a desired court house and court room on the CTC web page, the CTC initiates a RE call between the court room and the interpreter. The RE call connects the interpreter to the court room via Telepresence endpoints, such as the EX90. At the same time, the CTC loads the phone dialing extensions of that court room into the desk phone of the interpreter via the Extension Mobility API provided by the Cisco Unified Communications Manager (CUCM).

When an interpreter has a CTC session, she/he is moved to the “Not Ready” state in CAD; this prevents the interpreter from being selected if a court official initiates a NAI request.

-
- Step 1** Access the CTC application by entering **https://<CTC_IP>:8443/ctc** in your browser. The CTC interface appears.
 - Step 2** Under Segment, expand the segments, which could be counties, districts, or cities, and choose a court house.
 - Step 3** Choose a court room.
 - Step 4** Click the **Update Interpreter DN** button.
In the center panel, you will see a message to update the Interpreter DN.
 - Step 5** Click the **Update Interpreter DN** button.
 - Step 6** In the Agent Configuration dialog box, enter the DN and click **Submit**.
 - Step 7** In the center panel, click the green **Make a Call**.
The call is connected.
 - Step 8** To end the call, click the red **Disconnect** button in the center panel.
The Thank You screen appears.
-



Troubleshooting

September 23, 2015

Appendix Overview

This appendix explains how to troubleshoot issues with READ and eREAD.

Topics in this appendix include:

- [“Troubleshooting”](#)
 - [“eREAD/Finesse Issues”](#)
 - [“READ/CAD Issues”](#)
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Troubleshooting

eREAD/Finesse Issues

The following are issues that the agent may encounter using Finesse/eREAD:

- **Multiple concurrent logins:** If the agent is logged into Finesse using one browser and then logs into Finesse using another browser, the agent will not be automatically logged out of Finesse in the first browser. This could cause problems if the states of the different browsers are different.
- **Failover error:** If the Finesse server is down, you will be redirected to a failover server. You will need to login to the other server.
- **Call connection error:** When trying to call an agent or customer pod directly, the following message occurs: “Error Call could not be completed.” If you are calling an agent, the agent may not be in the Ready state or is offline. If you are calling a customer pod, there is another call to the customer pod in progress or the customer pod is offline. Wait for awhile and then try to place the call again in case either is just in another call. If you made several attempts to call, it is likely that the destination is offline.

READ/CAD Issues

The following are issues that the agent may encounter using CAD/READ:

- **READ does not appear in CAD:** Since READ is a web based application that makes use of CAD's integrated browser and the integrated browser is supported in the CAD premium version, verify that you are using CAD Premium by checking the CAD license. Alternatively, REM may not be running the correct web services. Contact the REM administrator to verify the web services.
- **When the call is connected, one page such as the sharing page does not display although other pages show correctly such as the welcome page:** Different web pages are scripted in CAD work flow configuration for different voice events. Check with the CAD administrator to verify the CAD work flow configuration with respect to the ringing event.

Direct Connect Issues

The following are issues that the agent may encounter using Direct Connect:

- **While answering a new call using READ, the Direct Connect application reports that is unable to find the application:** The most probable reason for this issue is that the Direct Connect application was not properly installed or not installed in the default directory. CAD is pre-programmed to execute the Direct Connect application from their default directory in the remote expert's workstation. If it is not installed in that directory, CAD cannot launch the application. As a result, it reports an error.
- **Direct Connect does not pop up when answering a call using READ:** Verify that the CAD administrator has been updated for the Direct Connect invocation event. In addition, verify that the path for Direct Connect executable is C:\CSI\DirectConnect\bin\DirectConnect\DirectConnect.exe.
- **Direct Connect does not close when the call is disconnected when using READ:** Verify that the CAD administrator has been updated for the Direct Connect Exit event and the path for Direct Connect close executable is C:\CSI\DirectConnect\bin\DirectConnect\DirectConnectClose.exe.
- **Direct Connect is stuck in "Waiting":** Check the DirectConnect.exe.config file to verify that the value of the property "cv_service_url" is set to the web service URL.
- **Direct Connect fails to share the application with the REIC:** First, verify that the border around the application being shared is green as shown in the figure below. If it is not green but red, click the shared window to turn the border green; this indicates that this application window is the active window. If the border is green but not sharing, verify that the collaboration URL is generated in the session table for this particular session.

Video Pane Issues

- **Video files are not displaying in the Video pane:** A call must be initiated from the REIC in order for video files to display in the widget. If a call originates from a phone (i.e. a phone calling the UCCX Pilot number), the video files would not show because they could not be pushed to a phone.