



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

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# Revision History

Revision Date	Description
June 2007	First Customer Ship (FCS) version 7.2(1)

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## Revision History

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# Cisco IP Phone Agent User Guide

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## Introduction

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Cisco IP Phone Agent is a service added to your Cisco IP phone. It allows you to do the following tasks:

- Log in and log out of the Automatic Call Distributor (ACD)
- View enterprise data when receiving a call
- View skills statistics
- Change your agent state
- Enter a reason code when changing your state
- Enter wrap-up data after handling an ACD call
- Record a customer call (Enhanced and Premium versions only)

IP Phone Agent keeps track of your agent state and the state of your phone. It presents menus to you that display only the agent states available to you at a given time.

## What's New in This Version

Cisco IP Phone Agent 7.2 includes the following new feature.

- Login and password encryption

## About This Document

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### Intended Audience

This document is written for contact center agents who use the IP Phone Agent service on IP phones when handling customer calls.

### Conventions Used

This document uses bold type for names of buttons and IP phone menu options. The following list gives several examples.

- Press the **Services** button to display the Services menu on your IP phone screen.
- Choose **Ready** from the Change State menu.

## IP Phone Agent Feature Levels

There are three feature levels of Cisco IP Phone Agent: 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	•	•
Enterprise data	•	•
Contact service queue data	•	•
Agent-initiated recording		•
Supervisor-initiated silent monitoring	•	•
Supervisor-initiated recording		•
Supervisor barge-in	•	•
Supervisor intercept	•	•

## Language Support

IP Phone Agent has been localized for the following languages:

Danish	Italian
Dutch	Japanese (Katakana)
English	Portuguese (Brazilian)
French	Spanish
German	Swedish

Only languages that use single-byte characters are supported. Languages that use double-byte characters, such as Chinese, are not supported at this time.

## The IP Phone Agent Screen

You access the IP Phone Agent service by pressing 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.

### 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 Agent State screen (if you are logged in) or the Login screen (if you are logged out).
OK	Closes the screen.
Option	Displays a menu from which you can start or stop recording an ACD call.
Select	Activates the option you have highlighted on the screen.
Stats	Displays the skills 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 skills statistics.

### Choosing Menu Options

To choose a menu option on any IP Phone Agent 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 number of the desired menu option using the number pad.

## Logging In

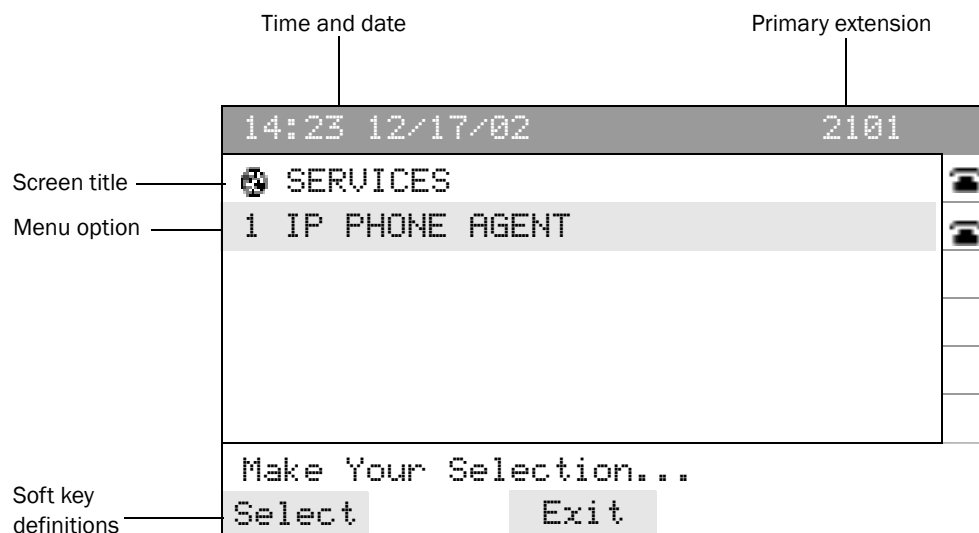
Logging in is the only task in IP Phone Agent that requires you to use the number pad to enter information.

**To log in:**

1. Press the **Services** button on your IP phone.

The screen of your IP phone displays the Services menu (See [Figure 1](#)).

**Figure 1.** The IP Phone Agent initial menu. Your menu may differ.



2. Choose **IP Phone Agent** from the menu.

The IP Agent Login screen appears. (See [Figure 2](#).)

**NOTE:** Your display may differ from the display shown in [Figure 2](#), depending on how your system administrator configured your IP phone.

Figure 2. Agent Login screen.

14:23 12/17/02	2101
Agent Login	[Phone Icon]
ID:	[Phone Icon]
Password:	[Phone Icon]
Extension:	[Phone Icon]
Enter agent information.	
Submit	<< Exit

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

**NOTE:** The Agent Login screen prompts you either for agent ID or agent name, depending on how your administrator configured the system.

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.

- Press the **Submit** soft key to log in.

The Skill Stats screen appears.

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

## 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 ([Figure 3](#)).

Figure 3. Forced Login menu.

14:23 02/15/04	2101
Ⓢ Forced Login	☎
1 Name logged into another extension.	☎
2 Press '2' to log in with another name or extension.	
Select	Exit

If you choose the first option, which is called a forced login, the other person using the agent ID or extension is forcibly logged out and you are logged in.

## Skill Statistics

You can view skill statistics whenever you are logged into IP Phone Agent. The Skill Stats screen is the default view. To access the Skill Stats screen from any other screen, press the **Stats** soft key (see [Figure 4](#)).

Figure 4. Skill Statistics screen (default view).

Skill Stats - ID:2311		
Skill Name	LQT	CIQ
sk6000	0:00:00	0
sk6500	0:00:00	0

Not Ready

Update State CData

The default view displays the Skill Name, LQT (longest queue time), and CIQ (calls in queue) fields. There are eight possible statistics that can be displayed for each skill, but only a maximum of two can appear at any time. The display is configured by your system administrator.

**NOTE:** Cisco Unified Intelligent Contact Management (ICM) automatically generates a default skill group. The name of the default skill group usually consists of a long string of numbers (for example, 000919530508). No agents are assigned to this skill group, however, and you may safely ignore it.

The statistics that can be displayed are listed in [Table 2](#).

Table 2. Available Skill Stats statistics

Statistic	Definition	Description
ACT	Average call time	The average length of time that agents spend on the calls in the queue for your skill groups.
AWT	Average wait time	The average length of time that calls wait in your queue before being answered.
CH	Calls handled	The total number of calls handled by agents in your queue today.

Table 2. Available Skill Stats statistics — *Continued*

Statistic	Definition	Description
CIQ	Calls in queue	The number of calls currently in your queue.
CT	Calls today	The number of calls queued today.
LOGD ON	Logged on	The number of agents currently logged on.
LQT	Longest queue time	The longest time spent by a call in your queue, displayed in h:mm:ss format.
MWT	Maximum wait time	The longest time that calls wait in your queue before being answered.

**Refresh Rate**

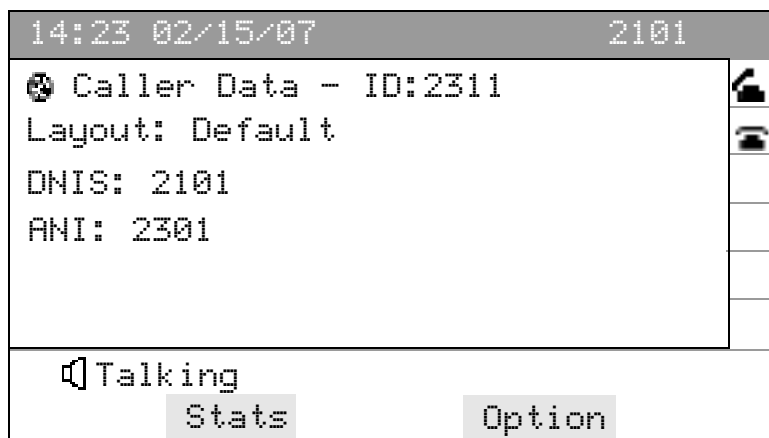
The Skill Stats screen automatically refreshes every 10 seconds. This is the default refresh interval. You can also refresh the screen manually by pressing the **Update** soft key.

## Caller Data

The IP Phone Agent service displays data about the caller in the Caller Data screen (see [Figure 5](#)). Caller data appears on your IP Phone Agent screen when a call is routed to your IP phone and remains there throughout the call.

The type of data that appears in this screen is configured by your system administrator.

Figure 5. Caller Data screen. Your data may differ.



The **Option** soft key is visible only if agent-initiated recording is enabled by the system administrator.

## Agent States

The available agent states in IP Phone Agent are listed in [Table 3](#).

**Table 3. Agent states**

State	Description
Logout	You are logged out of the ACD.
Not Ready	You are not available to receive routed* calls. If you receive a non-routed call, your state is automatically changed to Reserved, then Talking. When the call ends, your state is automatically changed back to Not Ready.
Ready	You are available to receive routed calls. If you receive a non-routed call, your state is automatically changed to Reserved, then Talking. When the call ends, your state is automatically changed back to Ready.
Talking	You are on the phone and do not have the call on hold. This state is automatically set for you by the ACD and does not appear on a menu.
Work Ready	You are completing work from a previous call. When you finish the work, you will be available to receive routed calls.
Work Not Ready	You are completing work from a previous call. When you finish the work, you will not be available to receive routed calls.

\* A routed call is one that comes in through the ACD. A call to your direct phone number is a non-routed call, and is not subject to these rules.

### Changing Your Agent State

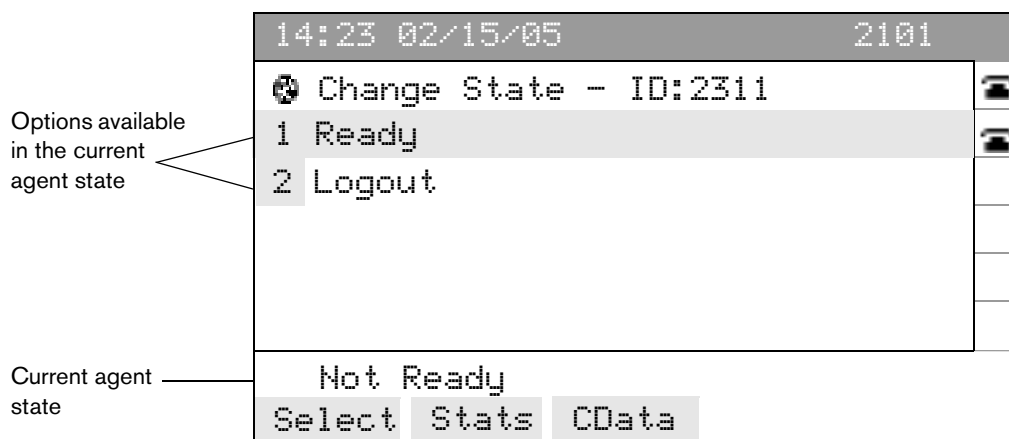
You change your agent state by choosing the appropriate state from the Change State menu (see [Figure 6](#)). The menu you see displays only the states that you can choose from your current state.

**To change agent state:**

- Choose the appropriate agent state from the menu.

Your current agent state always appears on the bottom line of the IP Phone Agent screen.

Figure 6. Initial IP Phone Agent screen after logging in.



## Changing Your State While on a Call

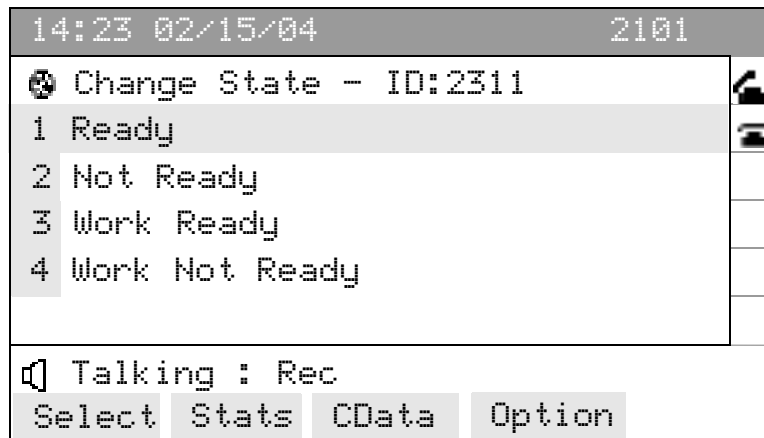
While you are on a call, the IP Phone Agent screen displays the Caller Data screen. The only soft key available on the Caller Data screen is the **Stats** soft key. To change your agent state while you are on a call, you must navigate to the Skill Stats screen and from there change the agent state.

### *To change your agent state:*

1. Press the **Stats** soft key on your IP phone.  
The Skill Stats screen appears.
2. Press the **State** soft key.  
The Change State menu appears.
3. Choose the appropriate agent state (see [Figure 7](#)).

**NOTE:** If you change your agent state while you are on a call, the state shown on your IP phone screen does not change. Your screen continues to show your state as Talking.

Figure 7. Agent state screen while on a call.



## Reason Codes

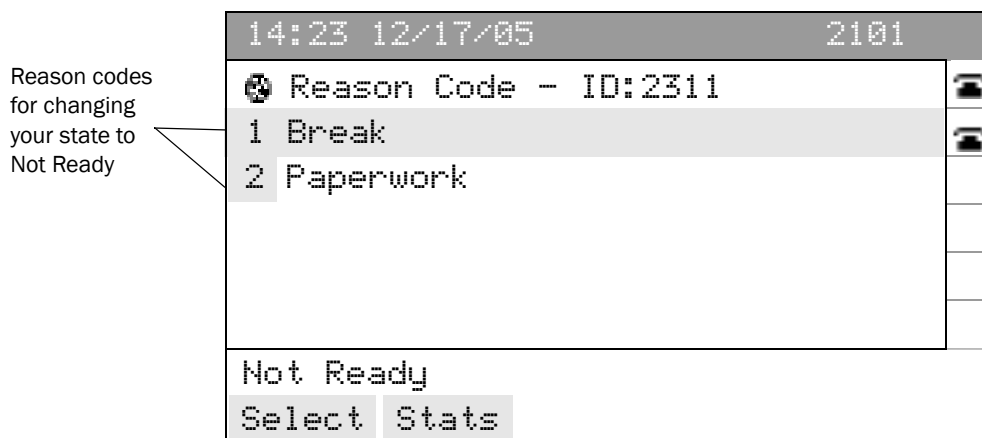
You may be required to enter a descriptive reason code when you change your agent state to Not Ready or when you log out. Reason codes are created by your system administrator and are customized for your contact center.

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

### To enter a reason code:

- Choose the appropriate reason code from the menu. (See [Figure 8](#).)

**Figure 8.** Sample Reason Code menu. Your reason codes may differ.



## Wrap-Up Data

You may be required to enter wrap-up data when you change your agent state to Work Ready or Work Not Ready. 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.

Wrap-up data are created by your system administrator and are customized for your work group. If your system administrator has enabled wrap-up data, whenever you change your state to Work Ready or Work Not Ready during a routed call, after the call ends IP Phone Agent prompts you to enter wrap-up data.

### 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 may differ.

14:23 07/10/05	2101
⊕ Wrap-up Data - ID:2311	☎
1 Update customer record	☎
2 Log customer call	
Work Not Ready	
Select Stats	

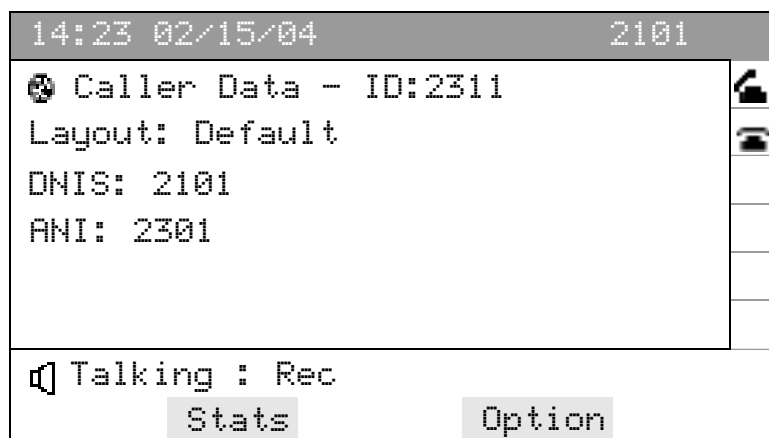
## Agent-Initiated Recording

You can start and stop recordings of any call you receive on your IP phone if you have the Enhanced or Premium version of IP Phone Agent and your administrator has enabled the agent-initiated recording feature.

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

While you are recording a call, “Rec” appears on the status line of your IP phone screen, as shown in [Figure 10](#).

**Figure 10.** Caller Data screen while recording a call.



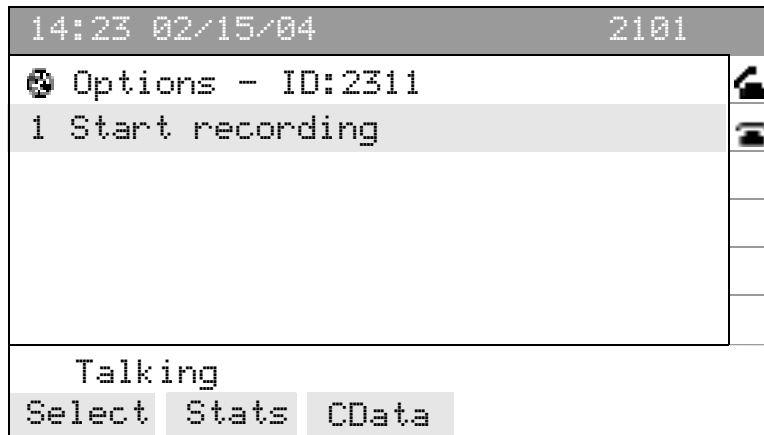
### To start recording a call:

1. While you are on an active call, press the **Option** soft key on your IP phone. The Options menu appears (see [Figure 11](#)).
2. Choose **Start recording** from the menu.

The Caller Data screen appears and “Rec” appears on the status line to indicate that you are recording the call (see [Figure 10](#)).

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

Figure 11. Options menu screen.

**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 Caller Data screen appears and the "Rec" notification on the status line disappears, indicating that you have stopped recording the call.

## Supervisor Intervention

Your supervisor can intervene in calls you receive. He or she can:

- “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 him- or herself
- Monitor your calls
- Record your calls

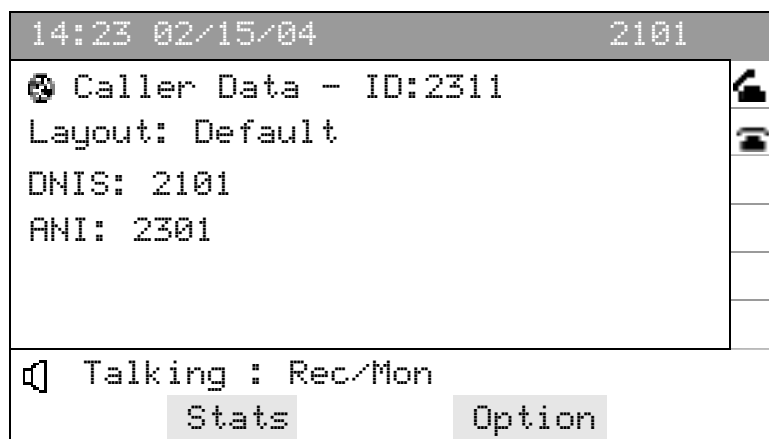
## Monitoring/Recording Notification

When your supervisor monitors or records your calls, you may or may not be notified, depending on how the system is configured. Notification can be enabled 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 terms appears on the status line of your IP phone screen (see [Figure 12](#)):

- Rec: indicates recording
- Mon: indicates monitoring
- Rec/Mon: indicates recording and monitoring

**Figure 12.** Caller Data screen showing that a call is being monitored and recorded by the supervisor.



## Logging Out

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You can log out only when your agent state is Not Ready.

**To log out:**

1. Change your agent state to Not Ready.
2. Change your agent state to Logout.
3. If your system configuration requires reason codes, the Reason Code menu appears. Choose the appropriate reason code.

IP Phone Agent returns to the Login screen.

You are now logged out of the ACD.

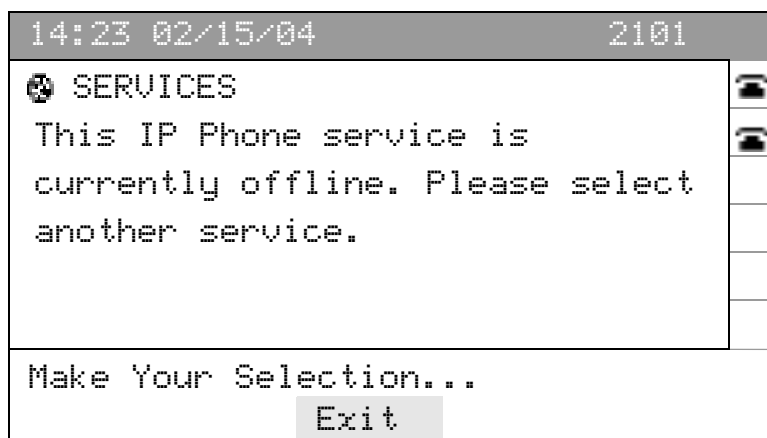
## Fault Tolerance

The IP Phone Agent service is fault tolerant if there are two or more IP Phone Agent 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 redundant system, your IP Phone Agent login screen displays two or more IP Phone Agent services. Only one service can be active at any one time. If you attempt to log in to an inactive service, an error message appears, directing you to select another service (see [Figure 13](#)).

**Figure 13.** Error message received when attempting to log into an inactive service.



## Failover

If one of the Cisco Agent Desktop (CAD) services fails in a redundant system, the backup service takes over, usually within one minute after the primary service fails.

If the IP Phone Agent service that you are logged into fails, you are logged out of the 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, by pressing the **Update** soft key or by changing your agent state, for example
- the IP Phone Agent screen is refreshed

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

If the IP Phone Agent service that you are logged into fails, you will not be logged out of the Computer Telephony Integration (CTI) service. You will still receive ACD calls, provided that the required services, including CTI, are running.

If you attempt to log back into the IP Phone Agent 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 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 out of the 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 CTI service and then logs you back into the IP Phone Agent service, the Chat service, and the CTI service.

If the connection between your IP phone and the CTI service is lost, your IP phone will also lose its connection with the IP Phone Agent service. If you are on a call, you will not lose the call, although data associated with the call may be lost. You may attempt to log back into the IP Phone Agent service any time during or after the call. In a redundant system, you may attempt to log into one of the backup IP Phone Agent services.

In the event of a service failure, data may be lost. For example, if the Enterprise service fails, enterprise data may be lost between the time the data is sent and the call is delivered to your IP phone.



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