



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

CAD 6.4 for Cisco Unified Contact Center Express Release 5.0  
Cisco Unified Communications Manager Edition  
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## Revision History

| Revision Date | Description                              |
|---------------|--|
| May 2007      | First Customer Ship (FCS) version 6.4(1) |
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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:

- Log in and log out of the Automatic Call Distributor (ACD)
- View caller data
- View contact service queue 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 wrapup data when changing to Work state

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

## What's New In This Version

This version of Cisco IP Phone Agent has added the following new feature:

- Wrapup data

## About This Document

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### Intended Audience

This document is written for agents who will be using the IP Phone Agent service on their IP phones when handling customer calls.

### Conventions Used

In this document, buttons you press or menu options you choose on your IP phone are bolded. For instance,

- Press the **Services** button to display the Services menu on the screen of your IP phone.
- Choose **IP Phone Agent** from the 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                    | •        | •                  |
| Wrapup data                     |          | •                  |
| Caller data                     | •        | •                  |
| Contact service queue data      | •        | •                  |
| Work ACD agent state            |          | •                  |
| Agent-initiated recording       |          | •                  |
| Supervisor-initiated monitoring |          | •                  |
| Supervisor-initiated recording  |          | •                  |
| Supervisor barge-in             |          | •                  |
| Supervisor intercept            |          | •                  |

## Language Support

IP Phone Agent has been localized for these 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 screen by pressing the Services button on your IP phone. The only screen that requires data entry is the login screen; all 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. Keys you will see 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 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.  |

### Selecting Menu Options

To select menu options on any IP Phone Agent screen, you can use either of two methods:

1. Use the scroll key to highlight the menu option you want, then press the **Select** soft key.
2. Enter the desired menu option's menu number on the number pad.

## Logging In

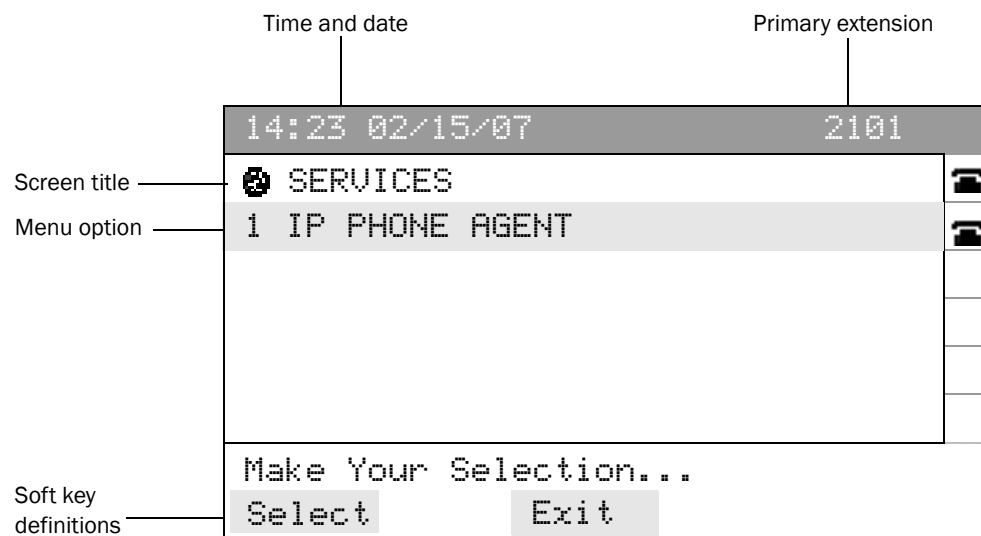
Logging in is the only task in IP Phone Agent that requires you to enter data.

**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 might differ.





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

The IP Agent Login screen is displayed (see [Figure 2](#)).

**NOTE:** Your display might differ from this display, depending on how your IP phone was set up by your administrator.

Figure 2. Agent Login screen.

|                          |   |
|--------------------------|---|
| 14:23 02/15/04           | 2101  |
| Agent Login              |  |
| Name:                    |  |
| Password:                |   |
| Extension:               |   |
| Enter agent information. |   |
| Submit <<                | Exit  |

- Using the number pad on your IP phone, enter your user name, 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 entries one character at a time.

**NOTE:** The IP Phone Agent Login Screen is configured to accept 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 you highlight the correct character. When you stop pressing the key, your choice appears in the field.

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

The CSQ Stats screen is displayed.

You are now logged into the ACD. You are automatically set in the Not Ready agent state.

## Forcing a Login

If your agent ID or extension is already in use, and you try to log in using that agent ID or extension, IP Phone Agent will ask if you want to force the login.



If you force the login, the person using the agent ID or extension will be forcibly logged out and you will be logged in place of that other person.

## Contact Service Queue Statistics

Contact service queue (CSQ) statistics are available for viewing whenever you are logged into IP Phone Agent. The CSQ Stats screen is the default view (see [Figure 3](#)).

You can access the CSQ Stats screen from any other screen by pressing the Stats soft key.

Figure 3. Contact Service Queue Stats screen (default view).

|                              |       |   |
|------------------------------|-------|---|
| 14:23 02/15/04               |       | 2101  |
| CSQ Stats - ID:2311          |       |  |
| Longest queue time: 00:08:15 |       |  |
| Calls queued: 10             |       |   |
|                              |       |   |
|                              |       |   |
|                              |       |   |
| Not Ready                    |       |   |
| Updat                        | State | CData   |

The screen displays the longest queue time and the number of calls in queue to the contact service queues 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** soft key and select **IP Phone Agent** from the menu to view the CSQ Stats screen again.

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

### Refresh Rate

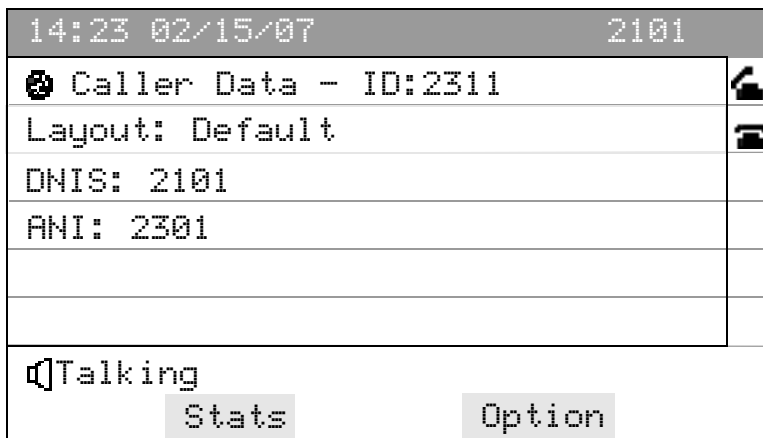
The CSQ Stats screen is automatically refreshed every 10 seconds. You can also refresh the statistics manually by pressing the **Update** soft key.

## Caller Data

The IP Phone Agent service displays caller data in the Caller Data window (see [Figure 4](#)). This data is displayed when a call rings on your phone and during the call.

The data displayed in this window is determined by the administrator.

Figure 4. 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 IP Phone Agent 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* 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. 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.)                              |

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

### Changing Your Agent State

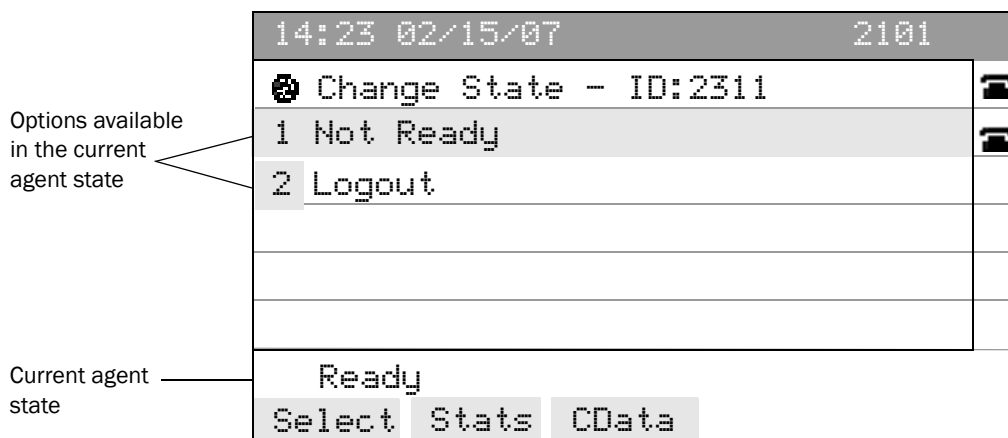
You change your agent state by selecting the appropriate state from the Change State screen (see [Figure 5](#)). The menu you see displays only the states available from your current state.

**To change agent state:**

1. Press the **State** soft key.  
The Change State screen appears.
2. Choose the appropriate agent state from the menu.

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

Figure 5. Agent State menu screen.



## Changing Your Agent State While On a Call

When you answer a call, the IP Phone Agent screen displays the Caller Data screen. The only soft key available on that screen is the Stats soft key. To change your agent state while on the call, you must display the CSQ Stats screen and from there change the agent state.

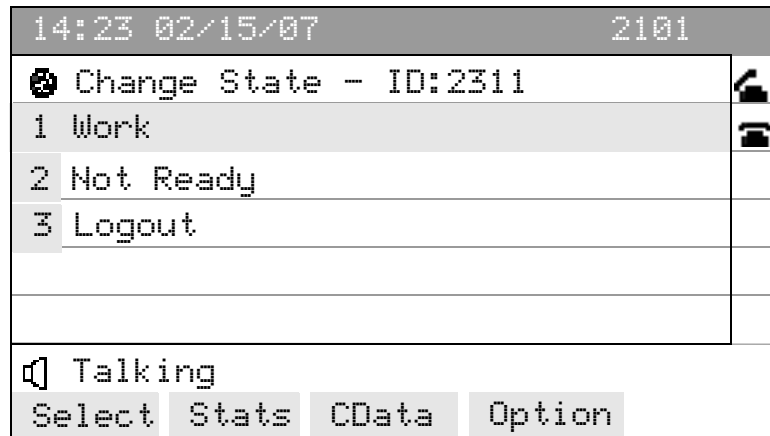
### To change your agent state:

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. Select the appropriate agent state (see [Figure 6](#)).

**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.



Figure 6. Agent state screen while on a call.



## Reason Codes

IP Phone Agent can be configured by the administrator so that you are required to enter descriptive reason codes when you change to the Not Ready agent state or log out. These codes are set up by your administrator and are customized for your contact center.

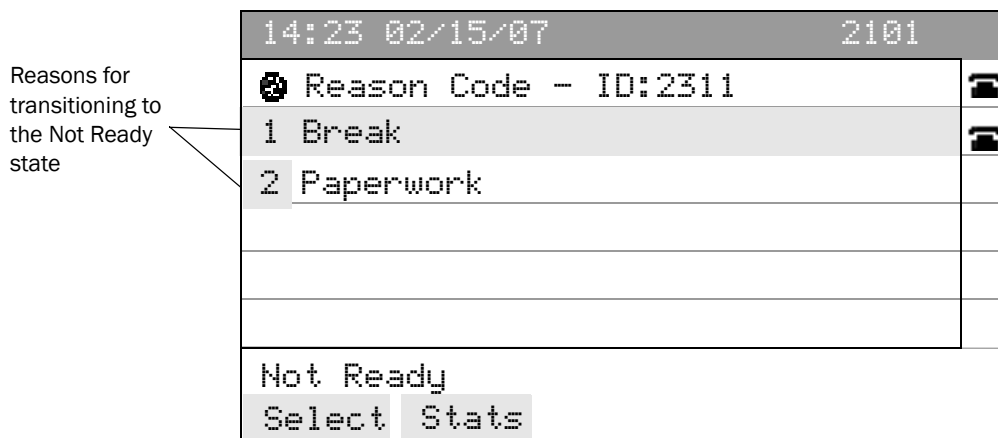
There can be different reason codes for changing state to Not Ready and for logging out.

If reason codes are enabled, whenever you change to the Not Ready state or log out, you are prompted to enter a reason code.

### To enter a reason code:

- Choose the appropriate reason code from the menu (see [Figure 7](#)).

Figure 7. Sample reason code screen. Your reason codes might differ.



## Wrapup Data

IP Phone Agent can be configured by the administrator so that you are required to enter wrapup data when you change to the Work state. The wrapup data are set up by your administrator and are customized for your work group.



Wrapup data are descriptions used by contact centers for purposes such as tracking the frequency of different activities or identifying the account to which to charge a call.

If wrapup data is enabled, whenever you transition to the Work state immediately after ending a call, you are prompted to enter wrapup data. This happens when you change your state to Work during an ACD call, or when the CSQ through which you received the call has been configured with the Automatic Work option.

### To enter wrapup data:

- Choose the appropriate wrapup data from the menu.

Figure 8. Sample wrapup data screen. Your wrapup data may differ.

|                          |   |
|--------------------------|---|
| 14:23 02/15/07           | 2101  |
| ⊕ Wrapup Data - ID:2311  |   |
| 1 Update customer record |  |
| 2 Log customer call      |   |
|                          |   |
|                          |   |
| Work                     |   |
| Select                   | Stats   |

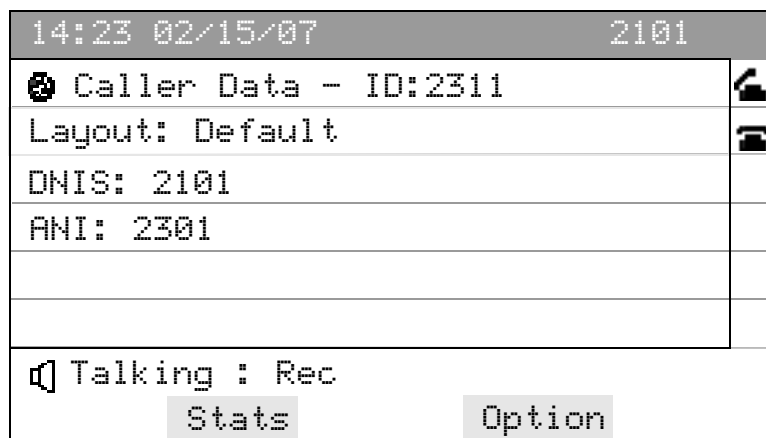
## Agent-Initiated Recording

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

You cannot listen to any recordings you make. They 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 9](#).

Figure 9. The IP phone screen while recording a call.

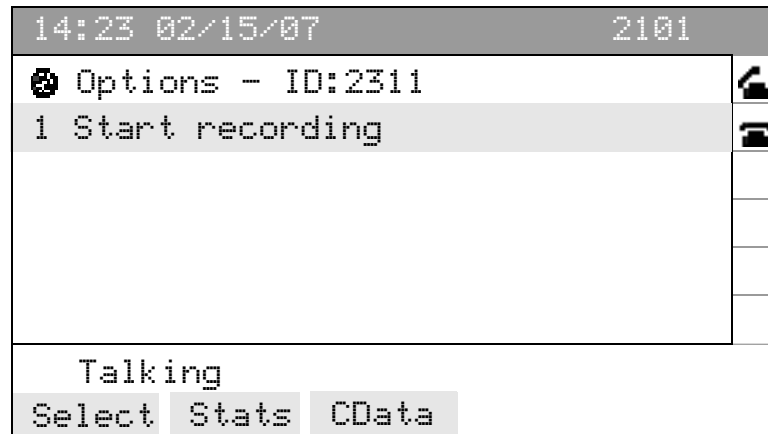


### To start recording a call:

1. While on an active call, press the **Option** soft key.  
The Options menu appears (see [Figure 10](#)).
2. Select **Start recording** from the menu.  
“Rec” appears on the status line to indicate that you are recording the call.

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

Figure 10. Options menu screen.

**To stop recording a call:**

1. Press the **Option** soft key.  
The Options menu appears.
2. Select **Stop recording** from the menu.

The "Rec" notification on the status line disappears, indicating that you have stopped recording the call.

## Supervisor Intervention

If your contact center is using the Enhanced or Premium version of CAD, your supervisor will be able to 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—transfer a customer call to him- or herself in a forced transfer
- Monitor your calls
- Record your calls

## Monitoring/Recording Notification

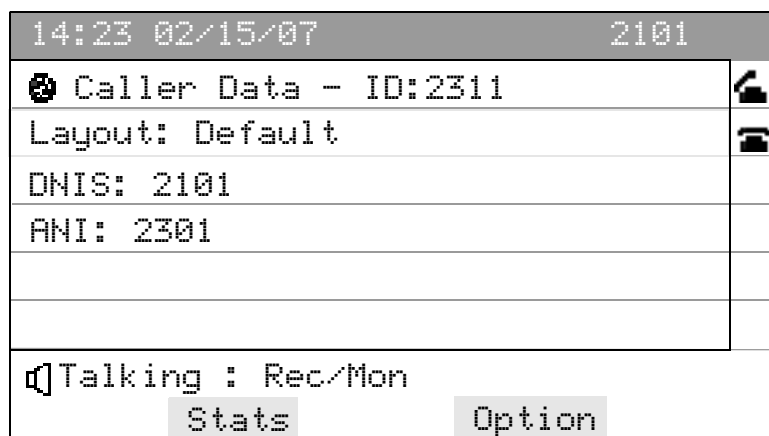
You might or might not be notified when your supervisor monitors or records your calls, depending on how the system is configured.

If notification is turned on and your supervisor monitors and/or records your call, you will see one of the following displayed on your phone screen’s status line (see [Figure 11](#)):

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

Notification can be turned on for either recording or monitoring, or both.

**Figure 11.** Screen showing that a call is being monitored and recorded by the supervisor.



## Logging Out

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You can log out from the Not Ready, Ready, Work, and Talking agent states.

**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.

IP Phone Agent returns to the Login screen.

You are now logged out of the ACD.

## Fault Tolerance

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The IP Phone Agent service is fault tolerant if there are two IP Phone Agent servers. If one server fails, the other server takes over. When the initial server fails, you are logged out, and you must manually log in to the other server.

## Redundancy

In a redundant system, your IP Phone Agent login screen will display two IP Phone Agent services. 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.

## Failover

In the event a CAD service fails, the backup service (if there is one) takes over, usually within one minute of the service failure.

Data at the time of a service failure can be lost. For instance, if the Enterprise service fails, enterprise data might be lost between the time the data is sent and when the call is delivered to the agent.

If the connection to the CTI service is lost, you will also lose the IP Phone Agent service. However, if you are on a call when the connection is lost, you will not lose the call, although data associated with the call might be lost. You can attempt to log back into the IP Phone Agent service at any time during or after the call, or, in a redundant system, the backup IP Phone Agent service.



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