



Cisco IP Phone Agent User Guide

CAD 6.4 for Cisco Unified Contact Center Express Release 5.0
Cisco Unified Communication Manager Express Edition
May 2007

Americas Headquarters

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

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

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

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

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

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

CCSP, CCVP, the Cisco Square Bridge logo, Follow Me Browsing, and StackWise are trademarks of Cisco Systems, Inc.; Changing the Way We Work, Live, Play, and Learn, and iQuick Study are service marks of Cisco Systems, Inc.; and Access Registrar, Aironet, ASIST, BPX, Catalyst, CCDA, CCDP, CCIE, CCIP, CCNA, CCNP, Cisco, the Cisco Certified Internetwork Expert logo, Cisco IOS, Cisco Press, Cisco Systems, Cisco Systems Capital, the Cisco Systems logo, Cisco Unity, Empowering the Internet Generation, Enterprise/Solver, EtherChannel, EtherFast, EtherSwitch, Fast Step, FormShare, GigaDrive, GigaStack, HomeLink, Internet Quotient, IOS, IP/TV, iQ Expertise, the iQ logo, iQ Net Readiness Scorecard, LightStream, Linksys, MeetingPlace, MGX, the Networkers logo, Networking Academy, Network Registrar, Packet, PIX, Post-Routing, Pre-Routing, ProConnect, RateMUX, ScriptShare, SlideCast, SMARTnet, StrataView Plus, TeleRouter, The Fastest Way to Increase Your Internet Quotient, and TransPath are registered trademarks of Cisco Systems, Inc. and/or its affiliates in the United States and certain other countries.

All other trademarks mentioned in this document or Website are the property of their respective owners. The use of the word partner does not imply a partnership relationship between Cisco and any other company. (0502R)

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

Cisco IP Phone Agent User Guide

© 2007 Cisco Systems, Inc. All rights reserved.

Revision History

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

Revision History

Contents

Cisco IP Phone Agent User Guide

What's New In This Version	1
■ About This Document	2
Intended Audience	2
Conventions Used	2
■ IP Phone Agent Feature Levels	3
Language Support	3
■ The IP Phone Agent Screen	4
Soft Keys	4
Selecting Menu Options	4
■ Logging In	5
Forcing a Login.....	6
■ Contact Service Queue Statistics.....	7
Refresh Rate	7
■ Caller Data.....	8
■ Agent States	9
Changing Your Agent State.....	9
Changing Your Agent State While On a Call.....	10
■ Reason Codes.....	12
■ Wrapup Data.....	13
■ Agent-Initiated Recording.....	14
■ Supervisor Intervention	16
Monitoring/Recording Notification.....	16
■ Logging Out.....	17

Index

Contents

Cisco IP Phone Agent User Guide

Introduction

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

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

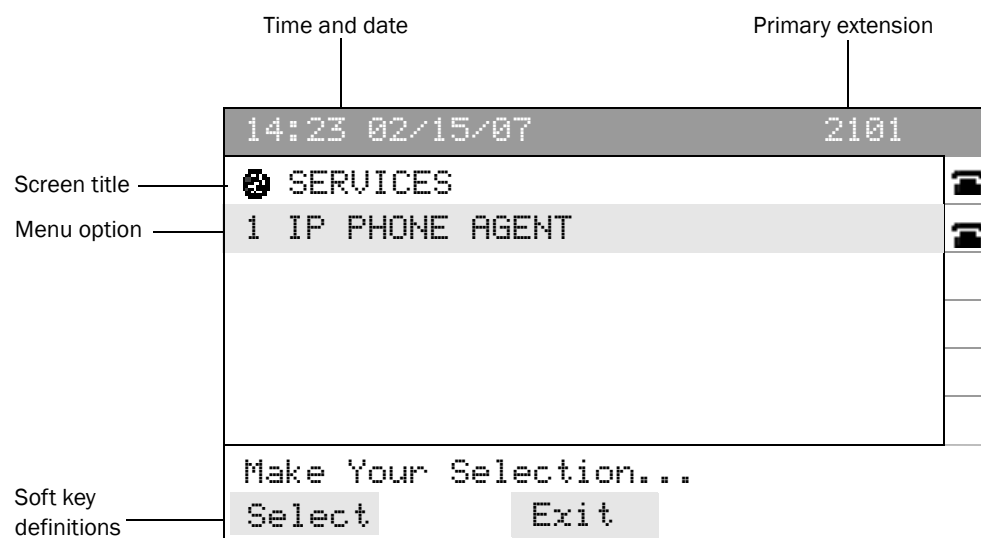
Logging in is the only task in IP Phone Agent that requires you to enter data.

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

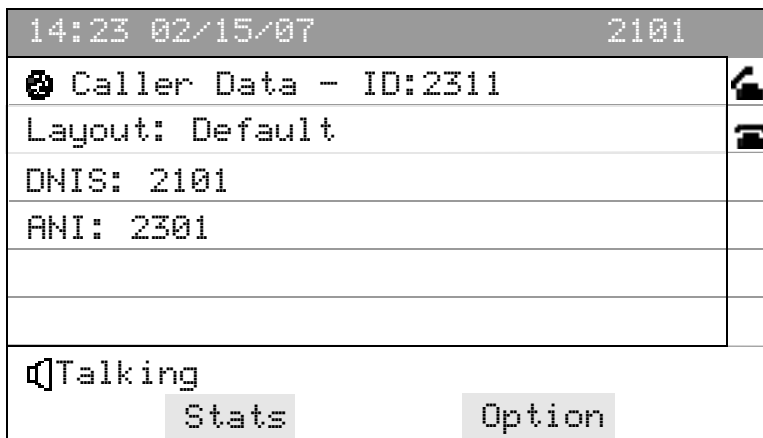
The CSQ Stats screen is automatically refreshed every 10 seconds. You can also refresh the statistics manually by pressing the **Update** soft key.

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

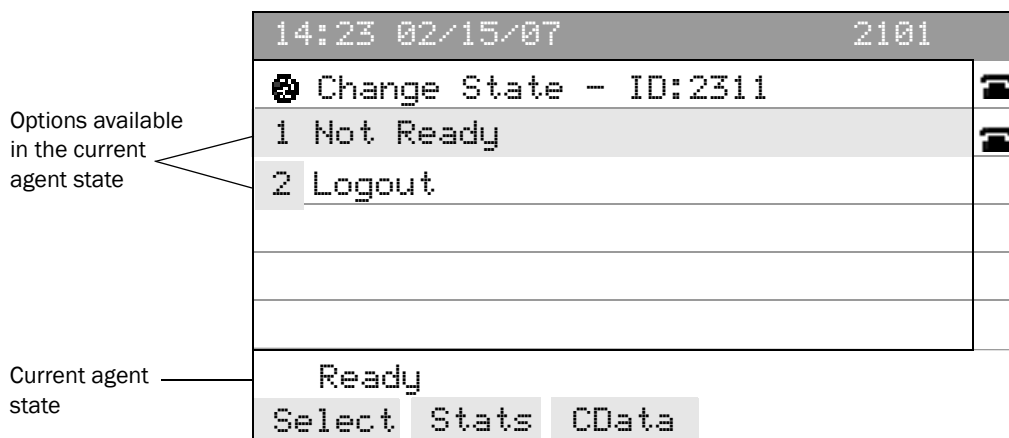
You change your agent state by selecting the appropriate state from the Change State screen (see [Figure 5](#)). The menu you see displays only the states available from your current state.

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

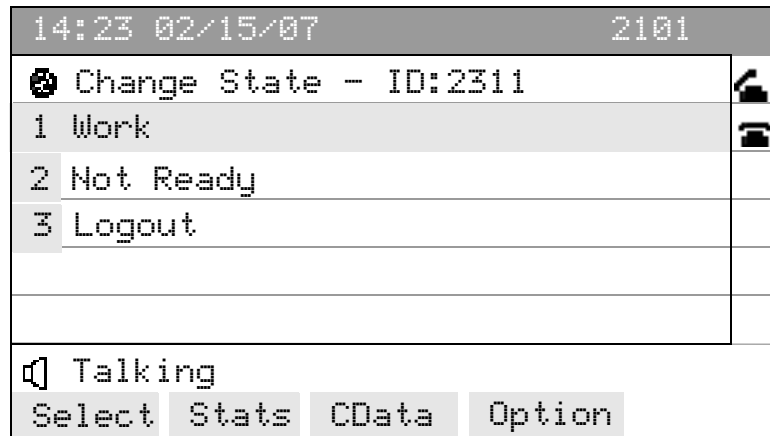
When you answer a call, the IP Phone Agent screen displays the Caller Data screen. The only soft key available on that screen is the Stats soft key. To change your agent state while on the call, you must display the CSQ Stats screen and from there change the agent state.

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.

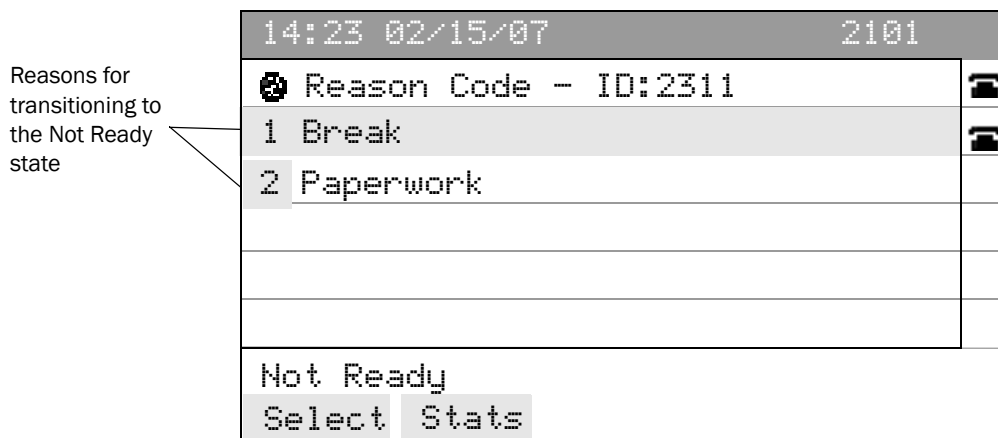
There can be different reason codes for changing state to Not Ready and for logging out.

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

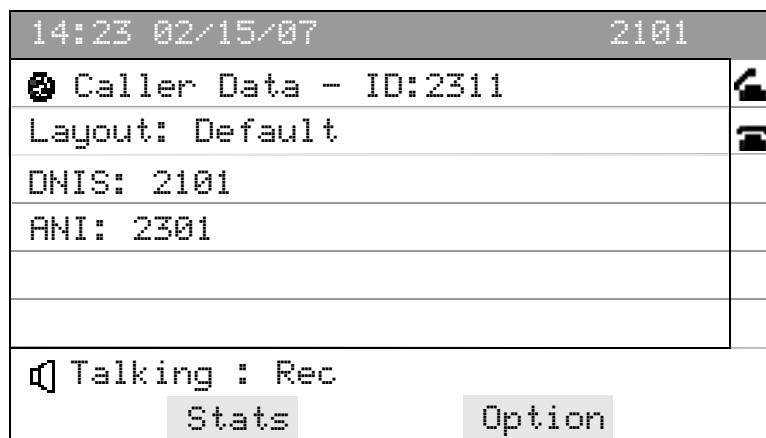
Agent-Initiated Recording

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.

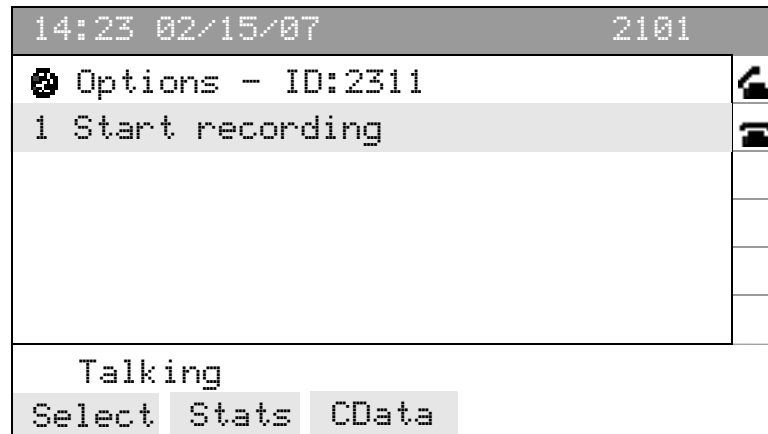


To start recording a call:

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:

- Monitor your calls
- Record your calls

Monitoring/Recording Notification

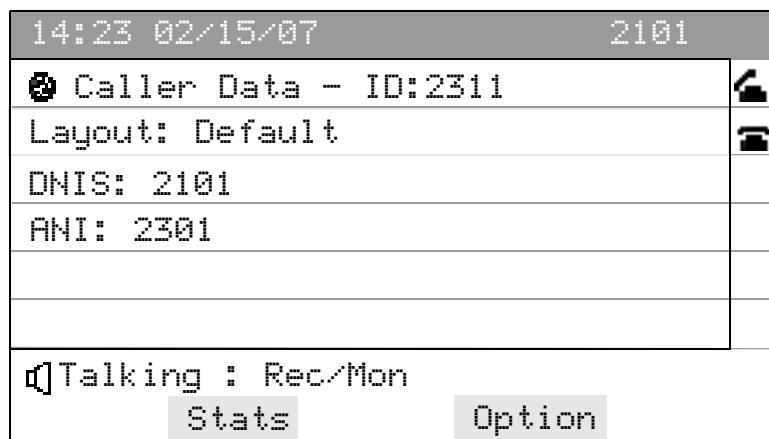
You might or might not be notified when your supervisor monitors or records your calls, depending on how the system is configured.

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

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.

Index

- A**
- Agent state
 - changing while on a call 10
 - Agent State screen 10
 - Agent states 9
 - changing 9
 - Agent-initiated recording 14
- C**
- Caller data screen 8
 - Cisco IP Phone Agent
 - agent states 9
 - feature levels 3
 - forcing a login 6
 - introduction to 1
 - languages supported 3
 - logging in 5
 - logging out 17
 - screen 4
 - selecting menu options 4
 - soft keys 4
 - what's new in this version 1
 - Contact service queue (CSQ) statistics
 - refresh rate 7
 - Contact service queue (CSQ) statistics screen 7
 - Conventions used in book 2
- F**
- Feature levels 3
 - Forcing a login 6
- H**
- How to
 - change agent state 9
- L**
- change agent state while on a call 10
 - enter a reason code 12
 - enter wrapup data 13
 - force a login 6
 - log in 5
 - log out 17
 - record a call 14
 - select menu options 4
- M**
- Languages supported 3
 - Logging out 17
- R**
- Monitoring notification 16
- S**
- Screen 4
 - agent state 10
 - caller data 8
 - contact service queue (CSQ) 7
 - initial 5
 - reason code 12
 - wrapup data 13
 - Selecting menu options 4
 - Soft keys 4
 - Supervisor intervention 16

W

Wrapup data 13