



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

CAD 6.6 for Cisco Unified Contact Center Express Release 7.0  
Cisco Unified Communication Manager Express Edition  
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*Cisco IP Phone Agent User Guide*

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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 (enterprise) data when receiving a call
- 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 (Enhanced and Premium versions only)
- Enter wrapup data when changing to Work state (Enhanced and Premium versions only)

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

Cisco IP Phone Agent 6.6 is now also available in Danish, Finnish, Norwegian, and Russian.

## Hardware and Software Environment

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

## 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		•

## Language Support

IP Phone Agent has been localized for these languages:

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

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

To access the IP Phone Agent screen, press the Services button on your IP phone. The only screen that requires you to use the number pad to enter data is the login screen. All of the other screens use selection menus.

**NOTE:** See your IP phone documentation for explanations of your phone's functions and features.

### Soft Keys

Each screen displays specific soft keys. All of the keys that appear are listed in [Table 1](#).

**Table 1.** Soft keys

Soft key	Description
<<	Deletes an entry backward, one character at a time.
CData	Displays the caller data for the current call.
Exit	Exits the current screen and displays the default phone screen.
OK	Closes the screen.
Option	Displays a menu from which you can start or stop recording an ACD call.
Select	Activates the option you have highlighted on the screen.
Stats	Displays the contact service queue 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 contact service queue 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 desired menu option's menu number on the number pad.

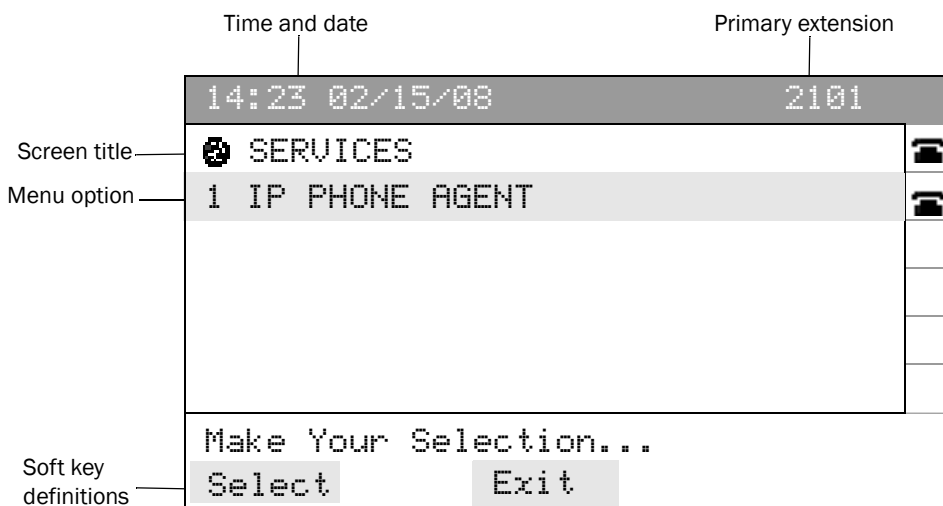
## Logging In

Logging in is the only task in IP Phone Agent that requires you to 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 (Figure 1).

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



2. Choose IP Phone Agent from the menu. The Agent Login screen appears (Figure 2).

Figure 2. Agent Login screen.

14:23 02/15/08	2101
Agent Login	[Phone Icon]
Name:	[Phone Icon]
Password:	[ ]
Extension:	[ ]
Enter agent information.	
Submit <<	Exit

**NOTE:** Your display might differ from the display shown in Figure 2, depending on how your administrator configured your IP phone.

3. Using the number pad on your IP phone, enter your 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 entry one character at a time.

**NOTE:** The IP Phone Agent Login Screen accepts both letters and numbers. When you press a number key, a menu appears that shows that number and its corresponding letters. (For example, if you press the 4 key, you see a menu that includes g, h, i, 4, G, H, and I.) Press the number key until the desired character is highlighted. When you stop pressing the key, your choice appears in the field.

4. Press the Submit soft key to log in. The CSQ Stats screen appears.

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

## 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 02/15/08	2101
Ⓢ Forced Login	☎
1 Name logged into another ext. Press '1' to log other agent out.	☎
2 Press '2' to log in with another name or extension.	
Select	Exit

If you choose Option 1, which is called a forced login, the other person using that agent ID or extension is forcibly logged out and you are logged in.

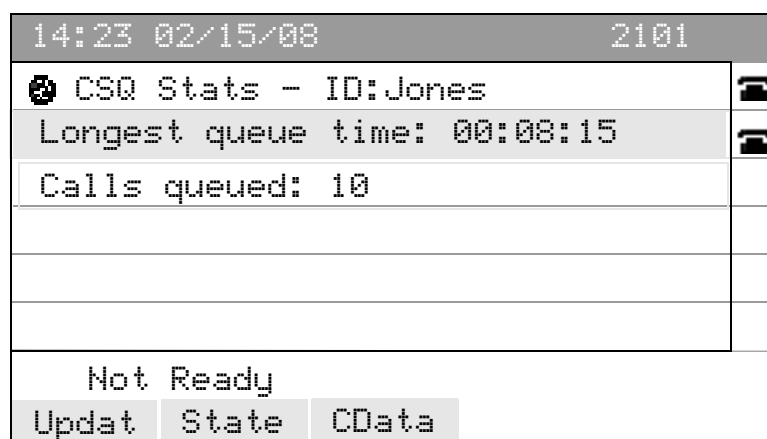
If you choose Option 2, you return to the Agent Login screen so you can attempt a login using an agent ID or extension that is not in use.

## Contact Service Queue Statistics

You can view contact service queue (CSQ) statistics whenever you are logged into IP Phone Agent. The CSQ Stats screen is the default view (Figure 4). To access the CSQ Stats screen from any other screen, press the Stats soft key.

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

Figure 4. Contact Service Queue Stats screen (default view)



14:23 02/15/08	2101
CSQ Stats - ID:Jones	[Phone Icon]
Longest queue time: 00:08:15	[Phone Icon]
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.

## Refresh Rate

The default refresh rate for the CSQ Stats screen is 10 seconds. You can also refresh the statistics manually by pressing the Update soft key.

**NOTE:** The IP Phone Agent (IPPA) client requests data to refresh this screen from the Cisco Browser and IP Phone Agent Service (BIPPA). BIPPA in turn obtains the data by polling the CTI Service at regular intervals. Because the IPPA refresh requests and BIPPA polling operations are asynchronous, in the worst case, data might not be refreshed for nearly 20 seconds, twice the refresh rate.

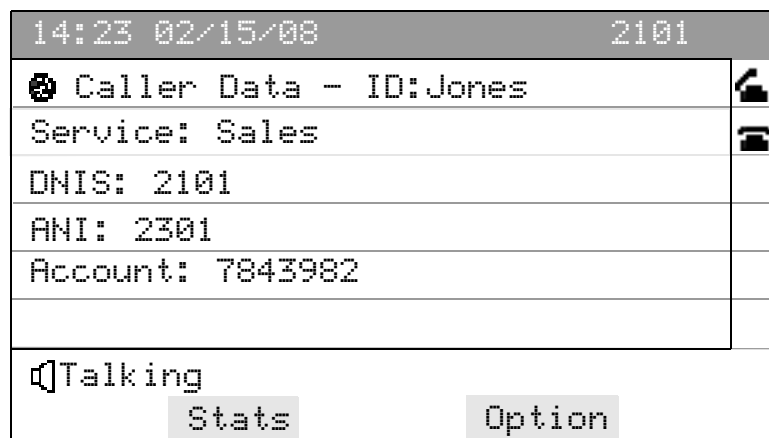
## Caller Data

The IP Phone Agent service displays caller data in the Caller Data screen (Figure 5). Caller data appears on your IP phone when the phone rings, is updated when the phone is answered, and remains there throughout the call.

Figure 5 shows a Caller Data screen displaying sample data. The data that is displayed on your screen will differ. The type of data that appears in this screen is configured by your administrator.

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

Figure 5. Caller Data window (your data may differ)



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

## Agent States

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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 <sup>1</sup> calls. If you receive a non-routed call you are automatically put into the Not Ready state, and returned to the previous state when the call ends.
Ready	You are available to receive routed calls. If you receive a routed call you are automatically put into the Reserved and then Talking state when the call is answered.
Talking	You are on the phone. This state is automatically set for you by the ACD and does not appear on a menu.
Work	You are completing work from a previous call and, when finished, will be available to receive routed calls. (Available only in Enhanced and Premium versions.)

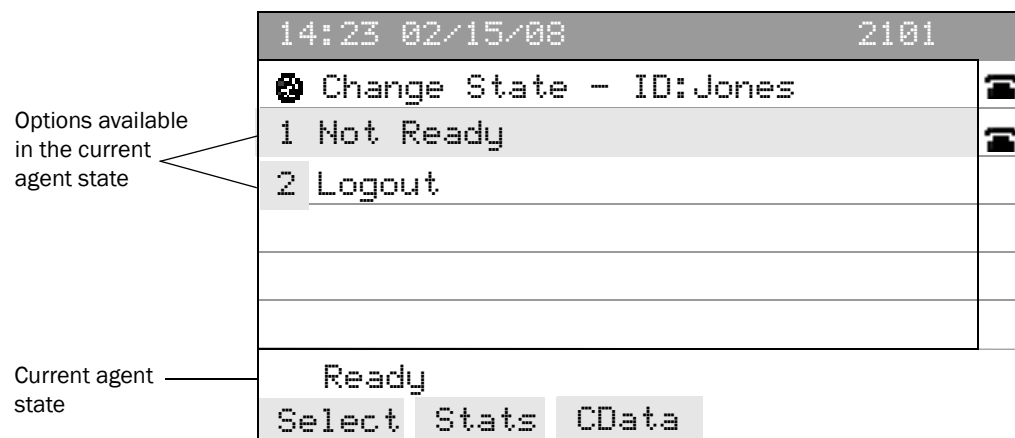
<sup>1</sup> A routed call is one that comes in through the ACD. A call to your direct phone number is a non-routed call, and not subject to these rules.

## Changing Your Agent State

You change your agent state by choosing the appropriate state from the Change State screen (Figure 6). The menu you see displays only the states that you can choose from your current state. Your current agent state is always noted on the bottom line of the IP Phone Agent screen.

To change agent state, choose the appropriate agent state from the menu.

Figure 6. Agent State menu screen



## Changing Your Agent State While On a Call

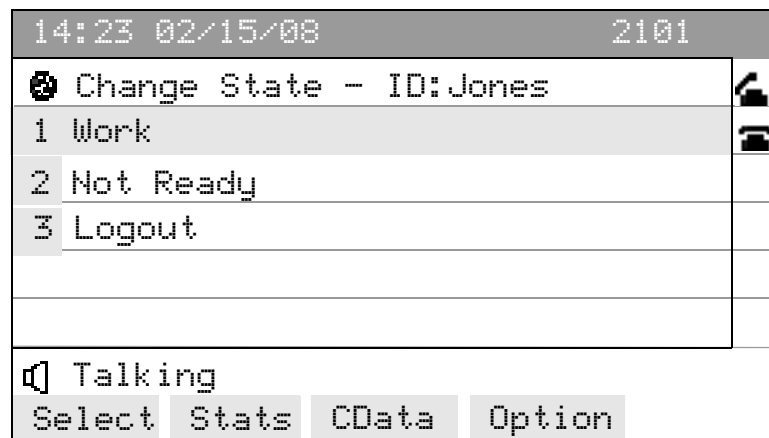
While you are on a call, IP Phone Agent displays the Caller Data screen. The menu you see displays the Stats soft key (and the Options soft key, if agent-initiated recording is enabled by the administrator). To change your agent state while you are on a call, you must navigate to the CSQ Stats screen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

### To change your agent state:

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

**NOTE:** When you change agent state while on a call, the agent state shown on the screen does not change. Your screen continues to show your state as Talking. The agent state you selected takes effect when the call terminates.

Figure 7. Agent State screen while on a call



## Reason Codes

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

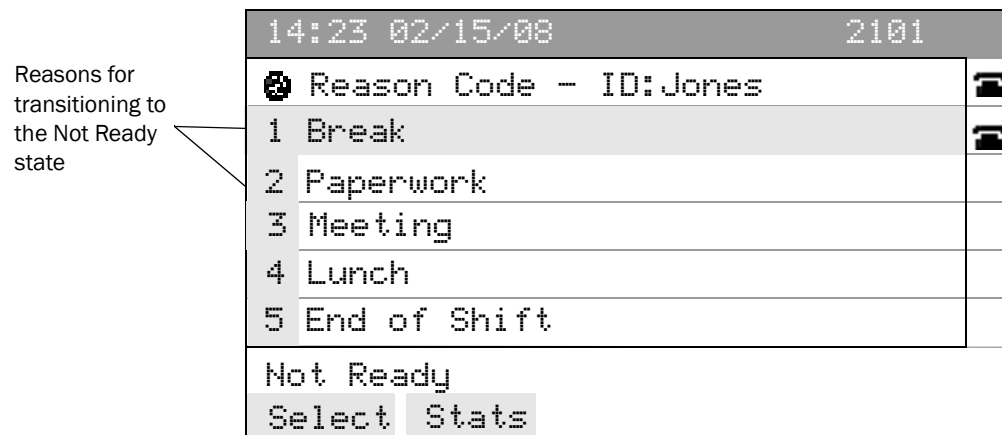
Figure 8 shows a Reason Code menu with sample reason codes. The reason codes that are displayed on your screen will differ.

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

To enter a reason code, choose the appropriate reason code from the menu.

You can choose the Not Ready state again when you are already in the Not Ready state. This enables you to enter another reason code. Reports will show back-to-back Not Ready state changes with the appropriate times in state and the respective reason codes.

**Figure 8.** Sample Reason Code screen



## Wrapup Data

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

Figure 9 shows a Wrapup Data menu with sample wrapup data. The wrapup data that is displayed in your menu will differ.

Wrapup data are created by your administrator and are customized for your work group. If your administrator has enabled wrapup data, whenever you change your state to Work during a routed call, after the call ends IP Phone Agent prompts you to enter wrapup data. You might also be prompted to enter wrapup data if 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 9. Sample Wrapup Data screen (your wrapup data may differ)

14:23 02/15/08	2101
⊕ Wrapup Data - ID:Jones	☎
1 Account Balance Inquiry	☎
2 New Account	
3 Close Account	
4 Support Inquiry	
Work	
Select	Stats

## Agent-Initiated Recording

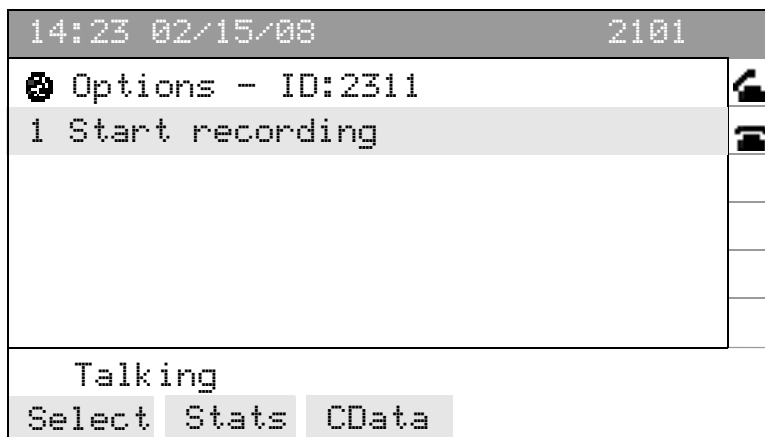
You can start and stop recordings of any call you receive on your IP phone if you have the Enhanced or Premium version of IP Phone Agent and your administrator has enabled the agent-initiated recording feature.

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

When you are recording a call, “Rec” appears on the status line of your IP phone screen, as shown in [Figure 11](#) To start recording a call:

1. While on an active call, press the Option soft key on your IP phone. The Options menu appears ([Figure 10](#)).

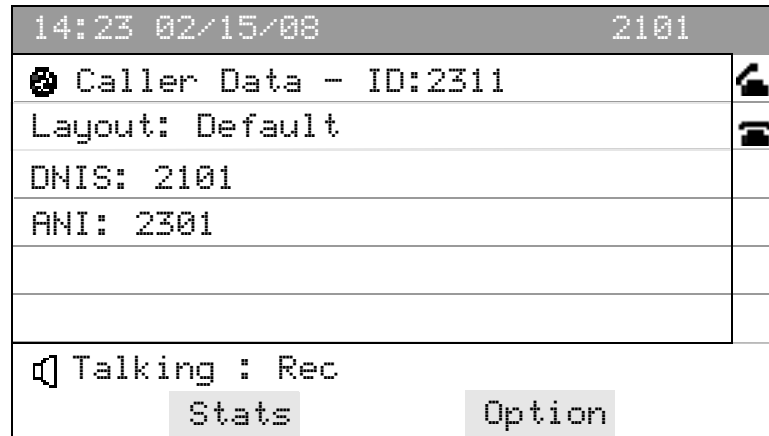
Figure 10. Options menu screen



2. Choose Start recording from the menu. “Rec” appears on the status line to indicate that you are recording the call (Figure 11).

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

Figure 11. The IP phone screen while recording a call



**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 “Rec” notification on the status line disappears, indicating that you have stopped recording the call.

**NOTE:** You cannot use the Stop recording option to stop a supervisor-initiated recording. This option only stops recordings that you have started.

## Supervisor Intervention

If your contact center is using the Enhanced or Premium version of CAD, your supervisor can intervene in calls you receive by performing any of the following:

- Monitor your calls
- Record your calls

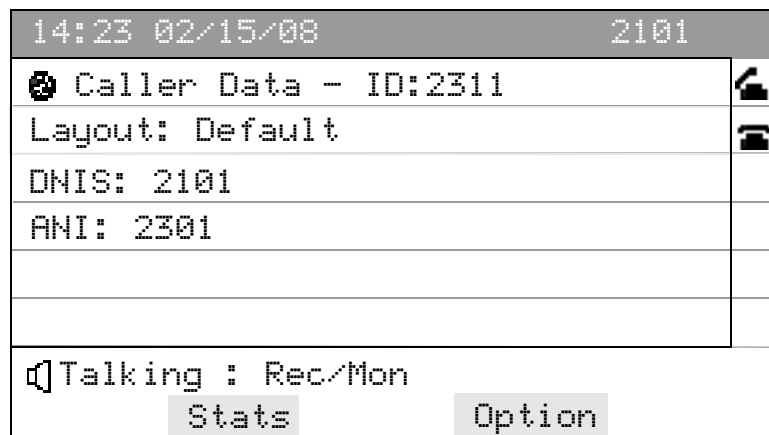
## Monitoring/Recording Notification

When your supervisor monitors or records your calls, you might or might not be notified, depending on how the system is configured. Notification can be turned on for recording only, monitoring only, or both.

If notification is enabled and your supervisor is monitoring and/or recording your call, one of the following abbreviations appears on the status line of your IP phone screen (Figure 12):

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

Figure 12. Caller Data screen showing call monitoring and recording



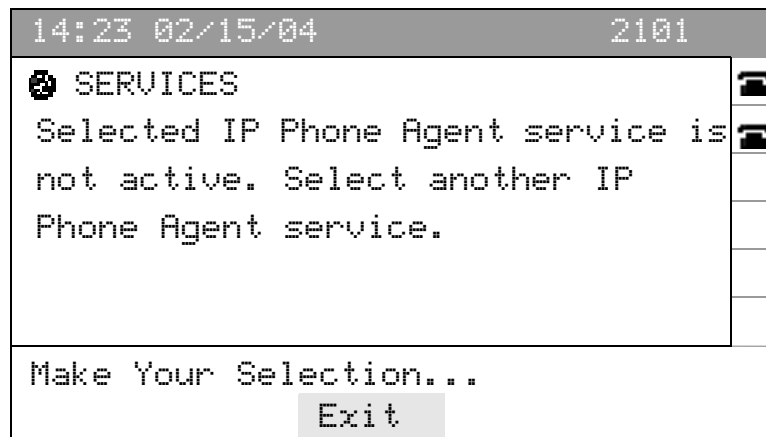
## Logging Out

You can log out only when your agent state is Not Ready, Ready, Work, or Talking.

### 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, and you are now logged out of the ACD.

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



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 or extension 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 Cisco 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 might be lost. You can attempt to log back into the IP Phone Agent service any time during or after the call.

In the event of a service failure, data might be lost. If the Cisco Enterprise service fails, enterprise data might be lost between the time the data is sent and the call is delivered to your IP phone.

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