Cisco IP Phone Agent User Guide

Cisco Unified Contact Center Enterprise Release 9.0
June 22, 2012

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Cisco IP Phone Agent User Guide

Introduction

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

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.

Hardware and Software Environment

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

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

Subscribe to the *What's New in Cisco Product Documentation* as a Really Simple Syndication (RSS) feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service and Cisco currently supports RSS version 2.0.

Documentation Feedback

You can provide comments about this document by sending email to the following address:

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We appreciate your comments.

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 all versions.

Feature	Standard	Enhanced & Premium
Reason codes	●	●
Wrap-up data	●	●
Enterprise data	●	●
Skill statistics	●	●
Agent-initiated recording		●
Supervisor-initiated silent monitoring	●	●
Supervisor-initiated recording		●
Supervisor barge-in	●	●
Supervisor intercept	●	●

Language Support

IP Phone Agent is localized in the following languages:

- Chinese (Simplified)—requires phones with UTF-8 support
- Chinese (Traditional)—requires phones with UTF-8 support
- Danish
- Dutch
- English
- Finnish
- French
- French (Canada)
- German
- Italian
- Japanese (Kanji)—requires phones with UTF-8 support
- Japanese (Katakana)—requires phones with Shift-JIS support
- Korean—requires phones with UTF-8 support
- Norwegian
- Polish
- Portuguese (Brazil)
- Russian—requires phones with ISO-8859-1 without Unicode escapes
- Spanish
- Swedish
- Turkish

The IP Phone Agent Screen

To access the IP Phone Agent service, press the Services button on your IP phone.

> **NOTE:** Some IP phones use different methods to access such features as the Services menu. See your IP phone documentation to learn how to access your phone's features.

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. Some IP phones with small screens might require scrolling up and down to view the entire IP Phone Agent screen.

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 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 display.

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.

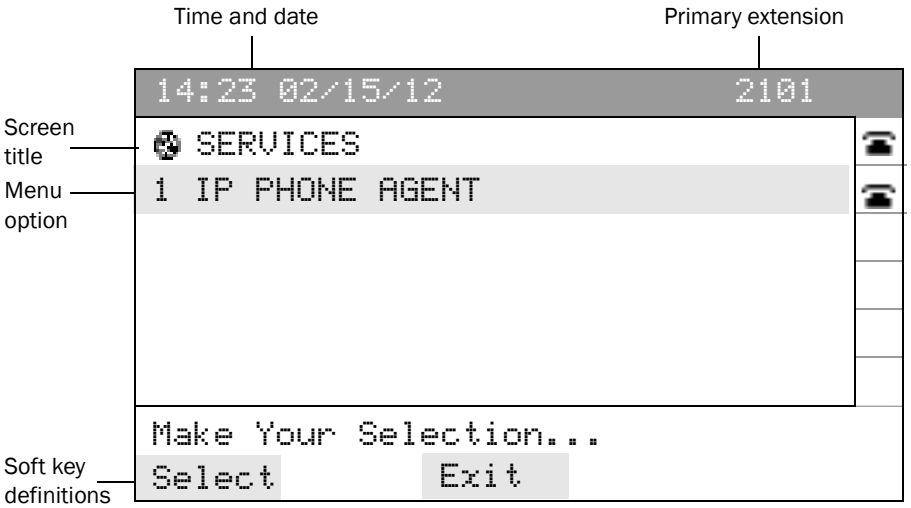
Figure 1 shows a sample initial menu. Your menu might differ.

> **NOTE:** If you are using Cisco Extension Mobility, you must log into extension mobility first before logging into the IP Phone Agent service.

To log in:

1. Press the Services button on your IP phone. The screen of your IP phone displays the Services menu (Figure 1).

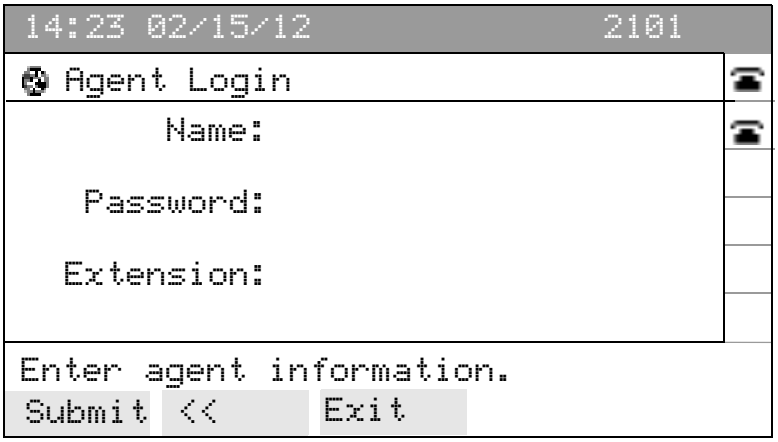
Figure 1. IP Phone Agent initial menu



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

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

Figure 2. Agent Login screen



3. 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.

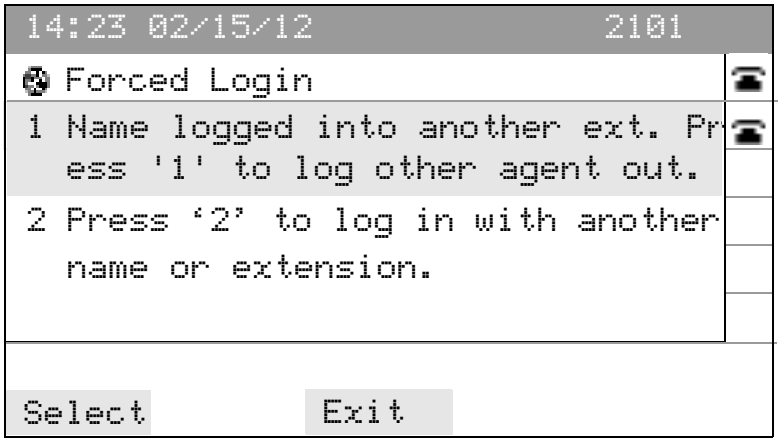
4. Press the Submit soft key to log in. The Skill Stats screen appears.

   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, name, or extension that is already in use, the Forced Login menu appears (Figure 3).

Figure 3. Forced Login menu



If you choose option 1, which is called a forced login, the other person using the agent ID, name, or extension is forcibly logged out and you are logged in. If you choose option 2, you are returned to the Agent Login screen (Figure 2) so you can log in with different credentials.

Multi-line Phones

IP Phone Agent supports multi-line phones. However, the number of lines supported is limited. You cannot log into a phone that has more than four lines (one ACD line and three non-ACD lines).

Only two calls per line are supported.

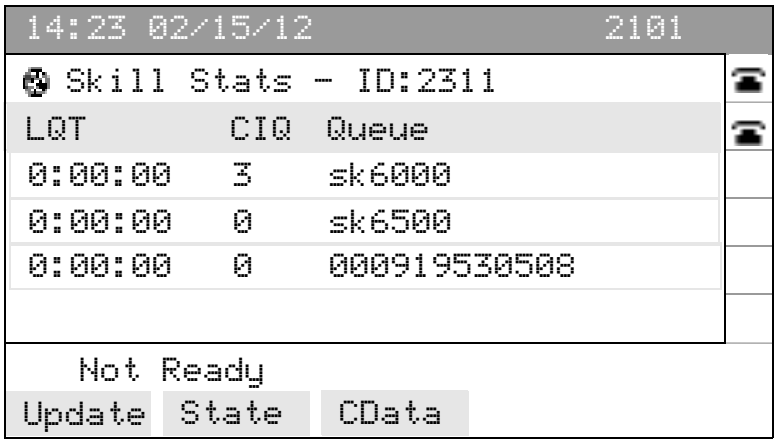
Skill Statistics

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.

Figure 4 shows a sample Skill Stats screen. Your screen might differ.

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

Figure 4. Skill Stats screen



The Skill Stats screen displays the following information:

- LQT (longest queue time): the longest time spent by a call in your queue, displayed in h:mm:ss format
- CIQ (calls in queue): the number of calls currently in your queue
- Queue (skill name)

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 can safely ignore it.

NOTE: If the queue name is of sufficient length, it wraps to the next line.

Refresh Rate

The default refresh rate for the Skill Stats screen is 10 seconds. You can also refresh the screen 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 (BIPPA) service. The BIPPA service in turn obtains the data by polling the CTI service at regular intervals. Because IPPA refresh requests and BIPPA service polling operations are asynchronous, in the worst case data might not be refreshed for nearly twice the refresh rate.

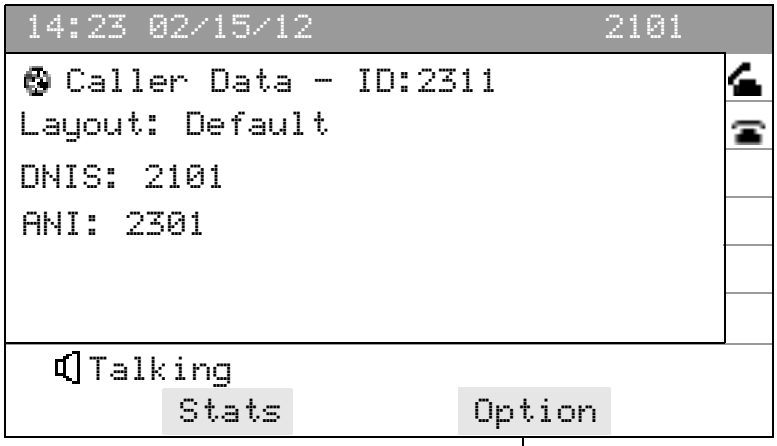
Caller Data

IP Phone Agent displays data about the caller in the Caller Data screen. Caller data appears on your IP Phone Agent screen when a call is routed to your IP phone 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 system administrator.

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

Figure 5. Caller Data screen



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 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, 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.
Reserved	A call is ringing on your phone but you have not answered it yet.
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.

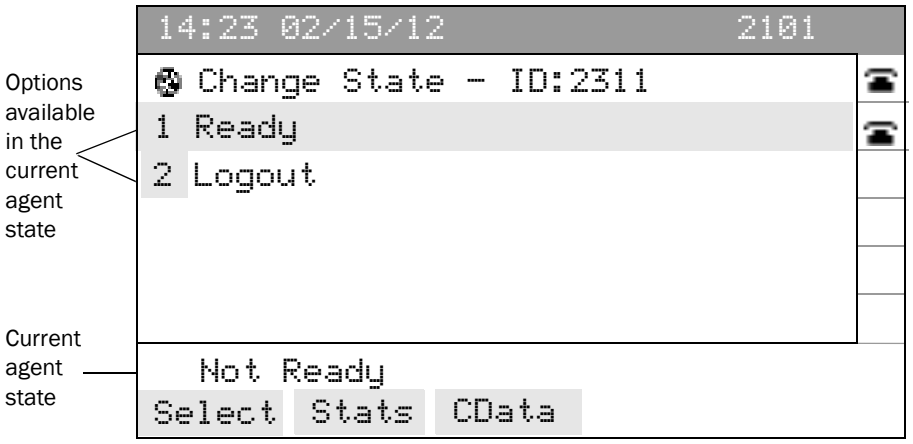
Changing Your Agent State

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

To change agent state:

- Choose the appropriate agent state from the menu.

Figure 6. Initial IP Phone Agent screen after logging in



Changing Your State While on a Call

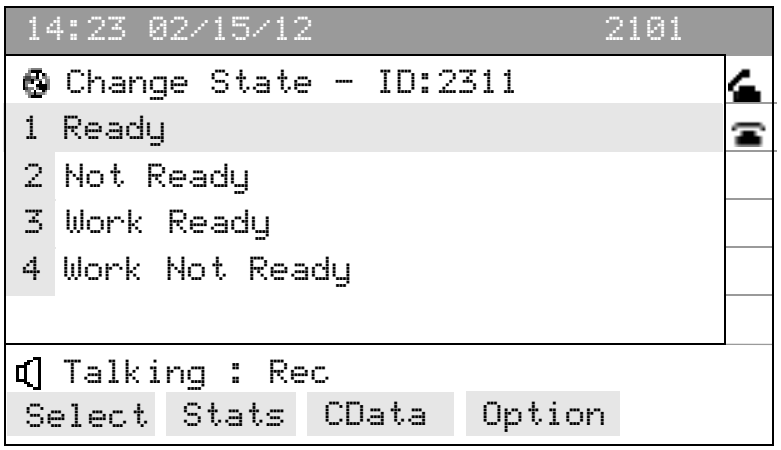
While you are on a call, the IP Phone Agent screen displays the Caller Data screen. The Option soft key is visible if agent-initiated recording is enabled by the system administrator. The only other soft key available on the Caller Data screen is the Stats soft key. To change your agent state while you 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 (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. Change state menu 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 system 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.

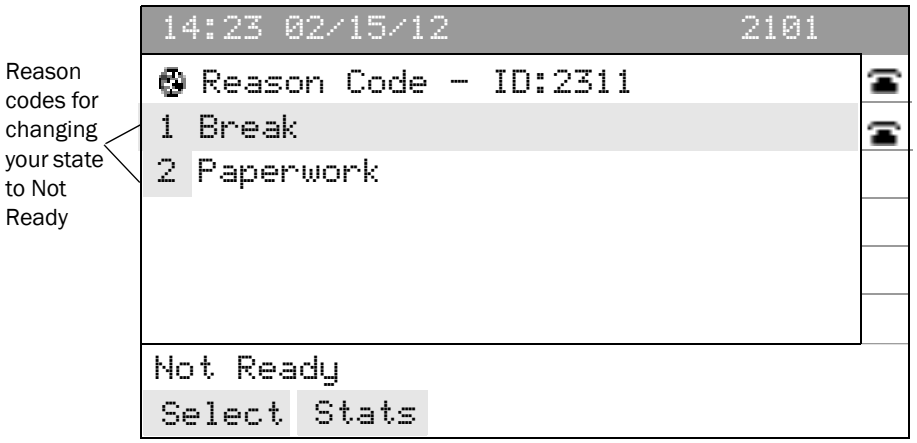
If your system administrator has enabled reason codes, whenever you change your agent state to Not Ready or log out, IP Phone Agent prompts you to enter a reason code.

You can select the Not Ready agent 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.

To enter a reason code:

- Choose the appropriate reason code from the menu.

Figure 8. Sample Reason Code menu



Wrap-Up Data

You might 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.

Figure 9 shows a Wrap-up Data menu with sample wrap-up data. The wrap-up data that is displayed in your menu will differ.

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.

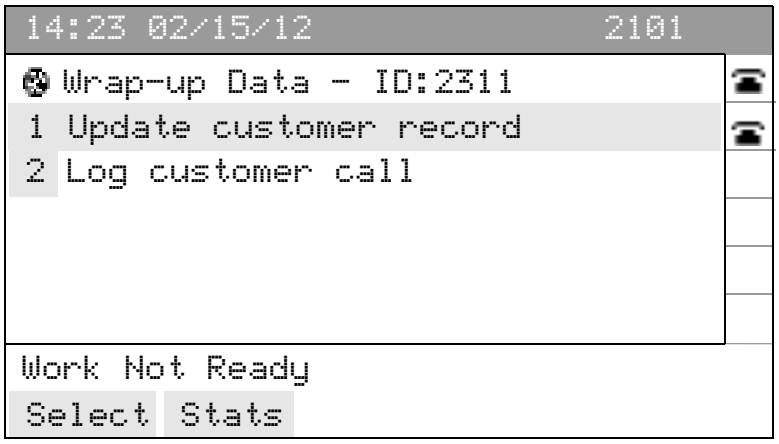
Your system administrator configures a certain amount of time for you to do your wrap-up work and enter wrap-up data. When the wrap-up (work) timer expires, you are automatically transitioned to the Ready or Not Ready state, depending on how it is configured.

> **NOTE:** If you do not select wrap-up data before the wrap-up (Work) timer expires, you will be unable to select a wrap-up data code.

To enter wrap-up data:

- Choose the appropriate wrap-up data from the menu.

Figure 9. Sample Wrap-up Data menu



Agent-Initiated Recording

You can start and stop recordings of any ACD 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 can also record non-ACD call if enabled by your administrator.

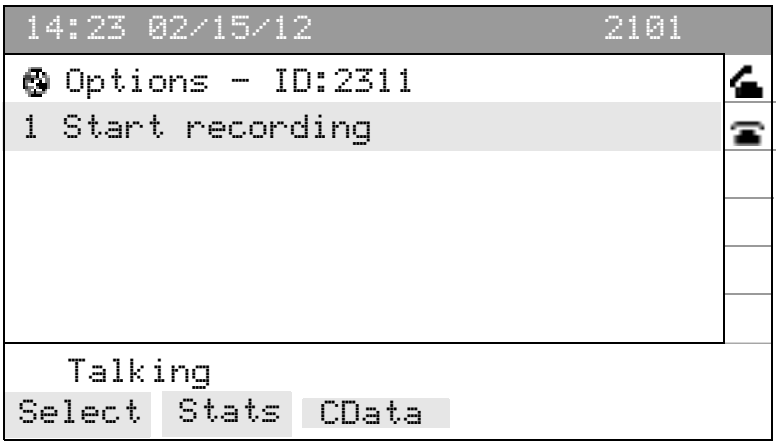
You cannot listen to any recordings you make. Recordings are available for review only to your supervisors through Supervisor Desktop.

While you are recording a call, “Rec” appears on the status line of your IP phone screen (Figure 11).

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 (Figure 10).

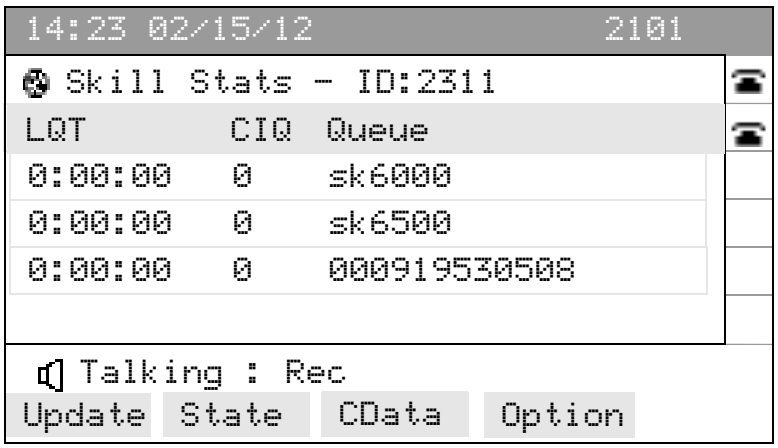
Figure 10. Options menu



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

NOTE: The Options menu 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. Skill Stats 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 Skill Stats screen appears and the “Rec” notification on the status line disappears, indicating that you have stopped recording the call.

NOTE: You cannot stop a supervisor-initiated recording.

Supervisor Intervention

Your supervisor can intervene in calls you receive by performing any of the following actions:

- “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 ACD calls (and non-ACD calls, if enabled)
- Record your ACD calls (and non-ACD calls, if enabled)

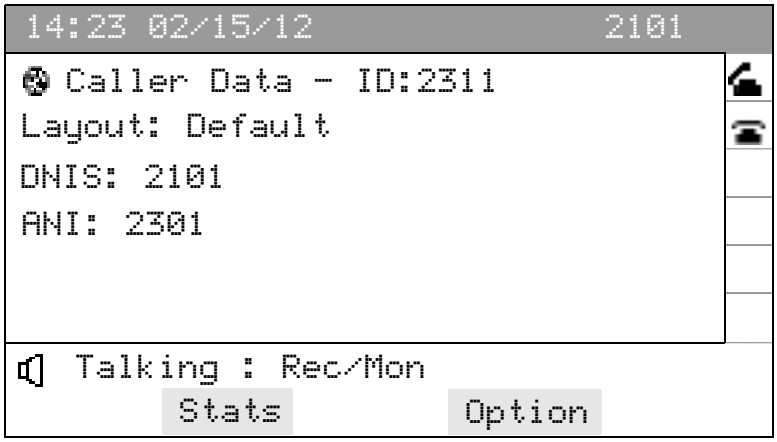
Monitoring/Recording Notification

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 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 (Figure 12):

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

Figure 12. Caller Data screen showing call recording and monitoring



Logging Out

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

> **NOTE:** If you are using Cisco Extension Mobility, you should log out of IP Phone Agent first before logging out of extension mobility.

To log out:

1. Change your agent state to Not Ready.
2. Change your agent state to Logout.
3. If 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.

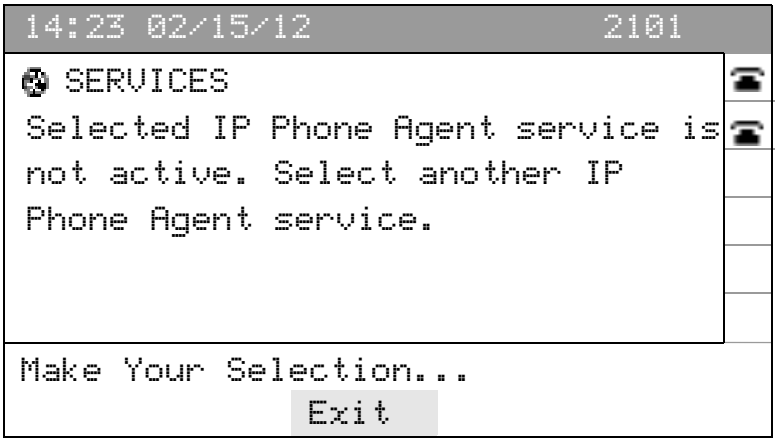
Fault Tolerance

IP Phone Agent 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 (high availability) system, the Services menu on your IP Phone displays two IP Phone Agent services (if your system administrator has configured them). 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 (Figure 13).

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



Failover

If one of the Cisco Agent Desktop (CAD) base 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 Cisco Chat service and you no longer appear as an agent in 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 communicate with the IP Phone Agent 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, name, 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, name, 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 a redundant system, you can attempt to log into one of the backup IP Phone Agent services.

In the event of a service failure, data might be lost. For example, 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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