



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

Cisco Desktop Product Suite 4.5 (ICD)

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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 7940 or 7960 IP phone. It allows you to do the following without using a computer:

- Log in and log out of the Cisco Integrated Contact Distribution (ICD) server
- View enterprise data when receiving a call
- View skills statistics
- Change your agent state
- Enter a reason code when changing agent states

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

**NOTE:** For information on setting up the IP Phone Agent service, see the Cisco Desktop Product Suite 4.5 *Installation Guide*.

## 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.

## Agent States

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The available agent states in IP Phone Agent are:

**Table 1. Agent states.**

<b>State</b>	<b>Description</b>
Logout	You are logged out of the ICD server.
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.
Talking	You are on the phone with a customer or another agent and do not have the call on hold. This state is automatically set for you by the ICD server and does not appear on a menu.
Work	You are completing work from a previous call and are not available to receive routed calls.

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

## Call Flows

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### Call Flow Examples

The following are examples of how typical situations can be handled using IP Phone Agent.

#### A Typical Call

This example assumes that you have already logged in to the ICD server and are in the Ready state, available to receive a call.

1. A call is routed to you by the ICD server.  
Your IP phone rings and displays information about the incoming call on the Enterprise Data screen.
2. You answer the phone.  
Your IP phone displays the Enterprise Data screen again.  
As you handle the call, you determine that you will need to do some follow-up work after the call terminates.
3. Before hanging up, you change your agent state.  
To change your agent state, you press the **Services** button on your phone, then select **IP Phone Agent**, and then choose the **Work** state from the menu.
4. The call ends and you hang up.  
To redisplay the IP Phone Agent screen with your current **Work** state showing, you press the **Services** button, and then select **IP Phone Agent** from the menu.
5. You perform your after-call work.  
The ICD server will not send you any more calls until you set your status to **Ready**.
6. When you're finished with your after-call work, you change your agent state to **Ready**.  
To change your agent state to **Ready**, you choose **Ready** from the menu.
7. You receive a new call.

At any time while you are logged in, you can select the **Stats** soft key to view your skills statistics.



### Using a Reason Code

In this example, you're handling a call but you are scheduled to take a break as soon as the call terminates. Your system administrator has configured IP Phone Agent to require the use of reason codes.

1. A call is routed to you by the ICD server.

Your IP phone rings and displays information about the incoming call on the Enterprise Data screen.

2. You answer the phone.

Your IP phone displays the Enterprise Data screen again.

3. As you handle the call, you keep in mind that your next agent state is Not Ready because you are scheduled for a break.

4. Before you hang up, you change your agent state to Not Ready.

To change your agent state, you press the Services button on your phone, then select IP Phone Agent, and then choose the Not Ready state from the menu. IP Phone Agent displays the Reason Code screen.

5. You select the appropriate reason code from the menu to explain why you're changing to the Not Ready state.

6. The call ends and you hang up.

IP Phone Agent shows your current agent state as Not Ready and does not route any calls to you until you come back from break and set your state to Ready.

## 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.

### Selecting Menu Options

To select menu options on any IP Phone Agent screen, you may 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.

### Soft Keys

Each screen displays specific soft keys. Keys you will see are:

Table 0-1. Soft keys.

Soft key	Description
<<	Deletes an entry backward, one character at a time.
Cancel	Cancels the current screen and returns you to the previous screen.
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).
Select	Activates the option you have highlighted on the screen.
Stats	Displays the skills statistics for the current session.
Submit	The equivalent of the computer "Enter" key, this key submits the data on the screen to the ICD server. Used only when logging into the ICD server.
Update	Updates the skills statistics.

## Logging In

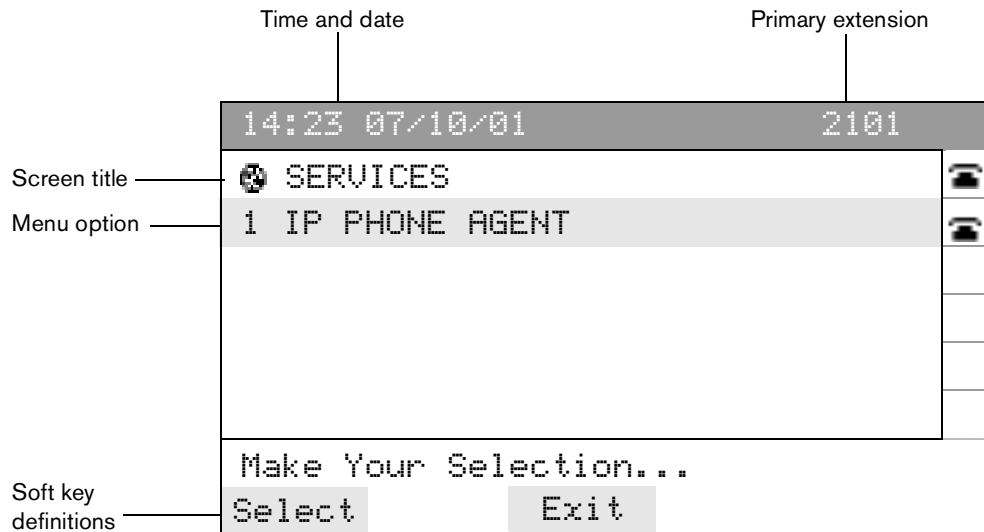
Logging in is the only task in IP Phone Agent that requires you to enter data.

► **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 may differ.



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

The IP Agent Login screen is displayed. (See Figure 2.)

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

Figure 2. IP Agent Login screen.

14:23 07/10/01	2101
Ⓢ IP Agent Login	☎
Agent ID:	☎
Password:	
Agent Ext:	
Enter agent information.	
Submit	<< Cancel

- Using the number pad on your IP phone, enter your agent ID, 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.

You are now logged in to the ICD server. You are automatically set in the Not Ready agent state.

## Enterprise Data

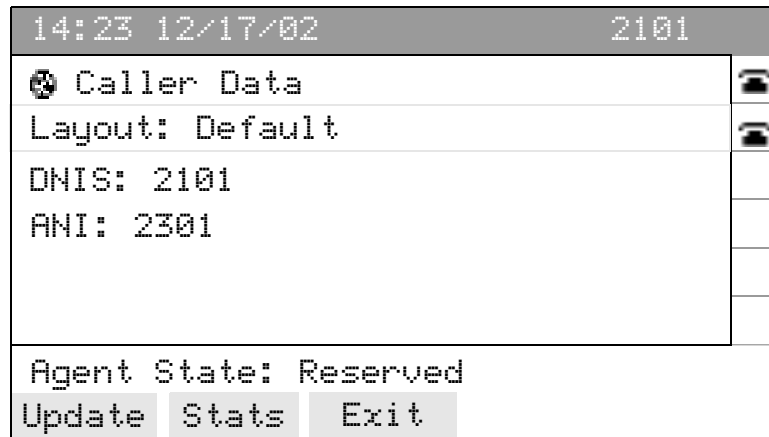
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Your system administrator can configure the IP Phone Agent service to display enterprise data in the Caller Data window (see Figure 3) when the phone rings and when you answer the phone. This is the default; your system administrator can configure the IP Phone Agent service to not display any enterprise data.

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

**NOTE:** Once you move past the Caller Data window, it cannot be redisplayed for the current call.

**Figure 3.** Caller Data window. Your data may differ.



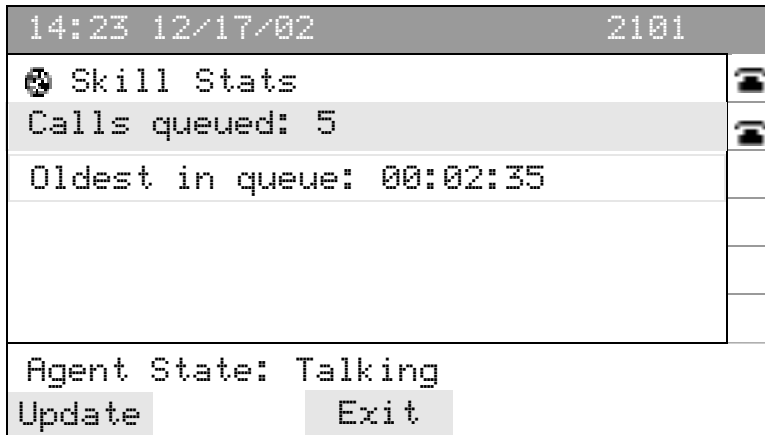
## Skill Statistics

Skill statistics are available for viewing whenever you are logged into IP Phone Agent.

► **To access the skill statistics:**

- Press the **Stats** soft key to display the Skill Stats window (see Figure 4).

Figure 4. Skill Stats window (default view).



The Skill Stats screen displays two statistics:

Calls queued: . . . . . The number of calls currently in queue.

Oldest in queue . . . . The length of time spent by the oldest call in the queue, in HH:MM:SS format.

### Refresh Rate

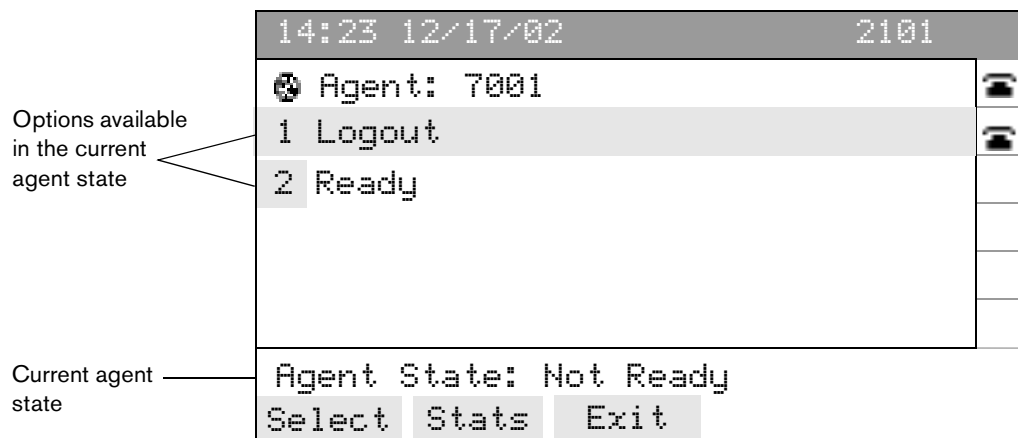
The Skill Stats window is automatically refreshed every fifteen seconds. Fifteen seconds is the default refresh interval; this can be changed by the system administrator.

You can also refresh the statistics manually by pressing the **Update** soft key.

## Changing Agent States

You change agent state by selecting the appropriate state from the IP Phone Agent menu. (See Figure 5.) The menu you see displays only the states available from your current state.

Figure 5. Initial IP Phone Agent screen after logging in.



► **To change agent state:**

- 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.

### Changing Agent State While on a Call

When you answer a call, the IP Phone Agent screen displays call information. This screen displays the number from which the incoming call is made, and shows a timer that measures the duration of the call.

To change your agent state while on the call, redisplay the IP Phone Agent screen, and then change the agent state.

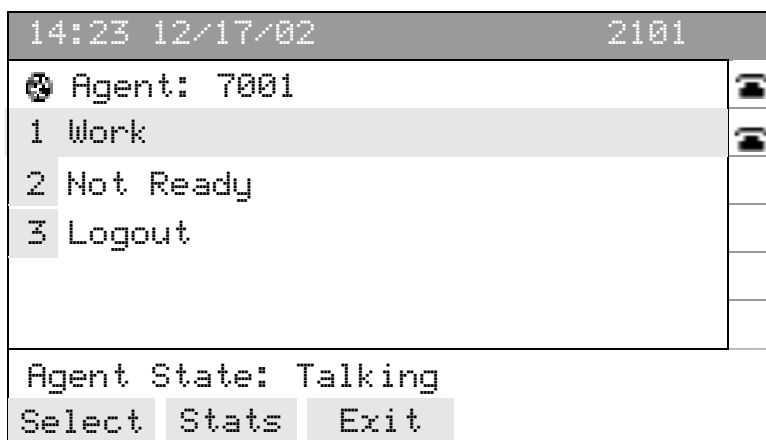
► **To redisplay the IP Phone Agent screen and change your agent state:**

1. Press the **Services** button on your IP phone.  
The Services menu appears.

2. Choose **IP Phone Agent** from the menu.  
The Agent state menu 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 Talking as your state, even after you terminate the call. To display the correct agent state after terminating a call, press the Services button, then select IP Phone Agent to redisplay the IP Phone Agent screen.

Figure 6. Agent state screen while on a call.





## Reason Codes

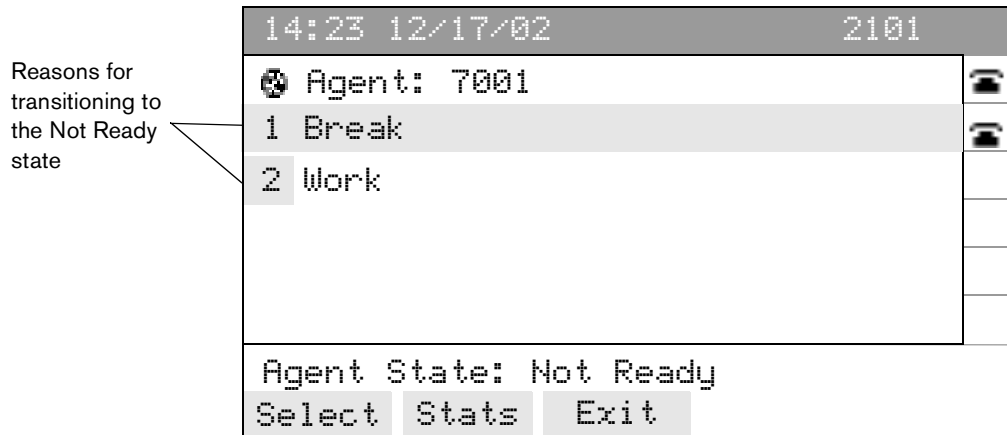
IP Phone Agent can be configured by the system administrator so that you are required to enter descriptive reason codes when you change to the Not Ready agent state or log out. These codes are set up by your system administrator and are customized for your contact center.

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 may differ.



## Server Autorecovery

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The server autorecovery feature enables IP Phone Agent to automatically recover its connection to the Cisco Desktop Product Suite servers in the event of a server restart or a network outage.

IP Phone Agent does not display any error messages when it detects that it is unable to communicate with a server. However, when you attempt to change your agent state when a server is down, several things can happen:

- You receive an error message such as “Connection to .CTI Server is down,” “Press 1 to resynchronize your agent state,” or “Service error. Try again.”
- Enterprise data does not appear when a call comes in
- Your IP phone remains in an incorrect agent state
- You are unable to log in

When the downed server recovers, IP Phone Agent regains full functionality.

During server autorecovery, you should continue using IP Phone Agent if possible (although it may not be fully functional), or attempt to log in until you are able to do so.

## Logging Out

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You can log out from any agent state.

► **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 ICD server.

