

Cisco Remote Expert Mobile Version 11.5(1)

Expert Assist Web Agent and Supervisor Consoles User Guide

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Preface

Change History

Changes	Date
Initial release	2016-08-10
New section Co-browse (with code) added	2016-10-31
New section Remote Expert Co-browse added in Introduction	2016-12-01

About this guide

This guide is intended for Experts that use Remote Expert Mobile with Unified CM.

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Organization of This Guide

This guide includes the following sections:

Introduction	Introduction and brief overview of Remote Expert Mobile and its SDKs, software server components, agent integrations and key technologies.
Expert Assist Web Consoles Overview	Description of the Expert Assist Web Agent and Supervisor Console
Expert Assist Web Agent Console	
Sign In—Expert Assist Web Agent Console	Procedure for signing into the Expert Assist Web Agent Console
Expert Assist Web Agent Console Details	Detailed features and descriptions of the Expert Assist Web Agent Console
Sign Out—Expert Assist Web Agent Console	Procedure for signing out of the Expert Assist Web Agent Console
Expert Assist Web Supervisor Console	
Sign In—Expert Assist Web Supervisor	Procedure for signing into the Expert Assist Web Supervisor Console
Expert Assist Web Supervisor Console Details	Detailed descriptions and procedures for supervisors to manage URLs and URL categories in the web agent console.
Sign Out—Expert Assist Web Supervisor	Procedure for signing out of the Expert Assist Web Supervisor Console
Acronym List	Lists some common industry and Cisco specific acronyms relevant to Remote Expert Mobile.

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, using the Cisco Bug Search Tool (BST), submitting a service request, and gathering additional information, see *What's New in Cisco Product Documentation* at:

<http://www.cisco.com/c/en/us/td/docs/general/whatsnew/whatsnew.html>.

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Conventions

This document uses the following conventions.

Convention	Indication
bold font	Commands and keywords and user-entered text appear in bold font.
<i>italic font</i>	Document titles, new or emphasized terms, and arguments for which you supply values are in <i>italic</i> font.
[]	Elements in square brackets are optional.
{x y z}	Required alternative keywords are grouped in braces and separated by vertical bars.
[x y z]	Optional alternative keywords are grouped in brackets and separated by vertical bars.
string	A nonquoted set of characters. Do not use quotation marks around the string or the string will include the quotation marks.
<code>courier font</code>	Terminal sessions and information the system displays appear in <code>courier</code> font.
< >	Nonprinting characters such as passwords are in angle brackets.
[]	Default responses to system prompts are in square brackets.
!, #	An exclamation point (!) or a pound sign (#) at the beginning of a line of code indicates a comment line.

Introduction

Cisco Remote Expert Mobile is a software solution that enables personal and actionable customer interactions within mobile and web applications. These interactions range from simple click-to call to a complete voice, video and Expert Assist customer engagement session interconnected to a full contact center environment. For example, Cisco Remote Expert Mobile can connect individual investors to the next available financial advisor within a mobile trading app (B2C—Business to Consumer) or a field employee's mobile app routing into an internal helpdesk (B2E—Business to Employee).

Remote Expert Co-browse

With Cisco Remote Expert Co-browse (previously called Meet Me), developers can deliver Expert Assist co-browse and application sharing in mobile or web applications. The Web Consoles will work with either (see [Co-browse \(with code\)](#)).

SDKs

Cisco Remote Expert Mobile includes Software Development Kits (SDKs) to provide voice over IP, video over IP and expert assist (app share and web co-browse, annotation and document push) features within pre-existing mobile and web applications. Whether placing or receiving calls, Cisco Remote Expert Mobile supports web application in every major browser such as: Google Chrome 33+, Mozilla Firefox 28+, Opera 28+, Internet Explorer 11 and Apple Safari 8. With WebRTC at its core, in-app communications are enabled without the need for plugins. Where WebRTC is yet to be supported in Internet Explorer and Safari, WebRTC plugins are provided for voice and video. Cisco Remote Expert Mobile also delivers integrated communications in iOS 7+ and Android 4.1.2+ apps through native libraries.

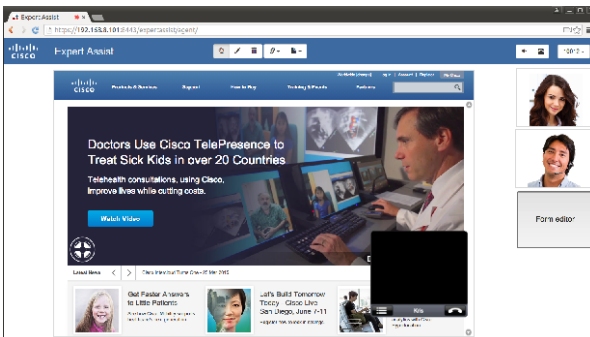
Expert Assist Web Consoles Overview

Remote Expert Mobile may be used in the Cisco Finesse® agent and supervisor desktop for Cisco Unified Contact Center Enterprise and Unified Contact Center Express. For more information, please refer to the Remote Expert Mobile—Finesse Gadget End User Guide for Agents and Supervisors.

For those who are part of a UC-only deployment, agent and supervisors can use the *Expert Assist Web Agent Console* and *Expert Assist Web Supervisor Console* to receive web-based voice/video calls. Agent and experts may also co-browse with customers or consumers that have initiated a support session from an RE Mobile enabled website or mobile application.

Expert Assist Web Agent Console

For Agents—receive calls and co-browse with customers

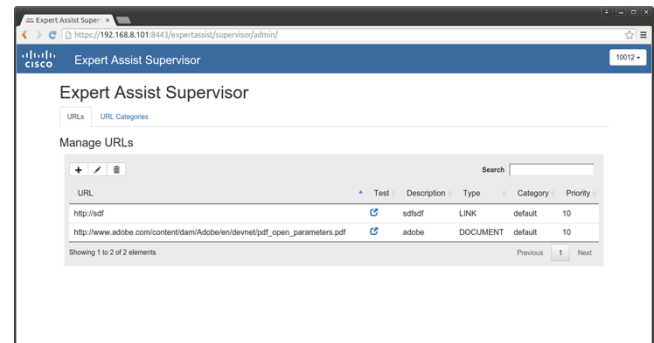


Features:

- Agent sign in and sign out
- Auto-answer voice and video calls in browser
- Mute
- Hang up
- Co-browse, Remote Control and Annotation
- Co-browse (with code)
- Document and URL push
- Add/Edit/Delete URL Categories
- Form Editor/Form Filling

Expert Assist Web Supervisor Console

For Supervisors—manage aspects of the agent desktop, such as which documents can be shared and which links can be pushed.



Features:

- Supervisor sign in and sign out
- Manage Pushed Links and Documents
 - Add or Delete URLs
 - Add/Edit/Delete URL Categories
 - Add or Delete Documents

Note: Document push supports HTTP or HTTPS URLs only, not FTP.

Expert Assist Web Agent Console

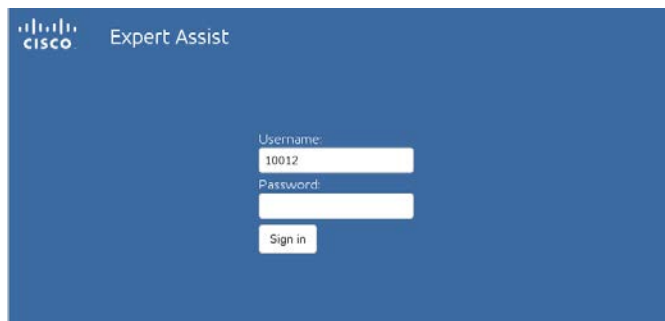
Sign In—Expert Assist Web Agent Console

Note: For browser compatibility information, see the *Cisco Remote Expert Mobile—Solution Configuration Guide*.

Procedure

- Step 1** Direct your browser to <https://<hostname or IP address>:8443/expertassist/agent/> where hostname or IP address is that of the Remote Expert Mobile Application Server (REAS). You may be asked to accept a security certificate. Contact your administrator for instructions specific to your browser.

This action opens a Sign In page for Cisco Expert Assist Web Agent Console.

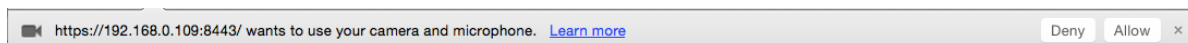


- Step 2** As an agent, enter the username given to you by your administrator / supervisor. This will be used to authenticate with Cisco CUCM using the AXL interface and should already be assigned the “Standard CCM End Users” role.

- Step 3** For Password, enter your Agent password that was provided by your administrator.

- Step 4** Click Sign In.

- Step 5** A successful sign-in launches the Expert Assist Web Agent interface below. If prompted by the browser, the agent should share their webcam and microphone.



Successful login will show the Agent Self-view window in the main viewing area.



Expert Assist Web Agent Console Details

The following is a view of the Expert Assist Web Agent Console in the middle of a voice, video and Expert Assist session:



The Expert Assist Web Agent Console consists of the following viewing areas:

- **Main window area**—This is the larger window view.
- **Side bar window area**—This shows smaller thumbnails of each window. Selecting a window in the sidebar will move it into the main window area.

When appropriate, the Expert Assist Web Agent Console presents the following tool bars:

■ Co-browse toolbar		While in a co-browse session, buttons for Remote control, Annotation, Clear annotation, URL push, Doc push will be shown.
■ Call management toolbar		Agent mute and hang up.
■ Agent logout toolbar		A drop down, enabling the agent to logout from the Expert Assist Web Console.
■ Agent call-answer options		A drop down menu, enabling the agent to determine how incoming calls are answered: <ul style="list-style-type: none"> • Prompt (agent clicks button to answer call) • Away (no calls will be directed to this agent) • Auto answer (calls automatically answered)
■ Meetme code button		For details, see Meet-me/Co-browse (with code) on page 14

The Expert Assist Web Agent Console has the following windows:

- **Consumer video window**—this displays the customer's video to the signed in agent.
- **Agent self-view window**—displays the agent's video from his or her camera
- **Co-browse window**—this displays the customer's remote browser tab or mobile application screen (that is, the co-browse share session)
- **Form editor window**—this displays an agent tool for completing customer forms rapidly. The tool presents an easily editable list of fields outside of the co-browse window to simplify agent entry.

Note: Agents may select specific fields with the pointer and enter them on behalf of the customer within the Co-browse window as well.

"On hook" / No active call—Expert Assist Web Agent Console

The Expert Assist Web Agent Console has the following windows:

When the Agent is logged in, but not in an active call, non-relevant windows will be hidden. The agent self-view will be placed in the main window area. The Consumer Video, Co-browse and Form Editor windows will not be displayed.

A drop down status menu enables the agent to determine how incoming calls are answered:

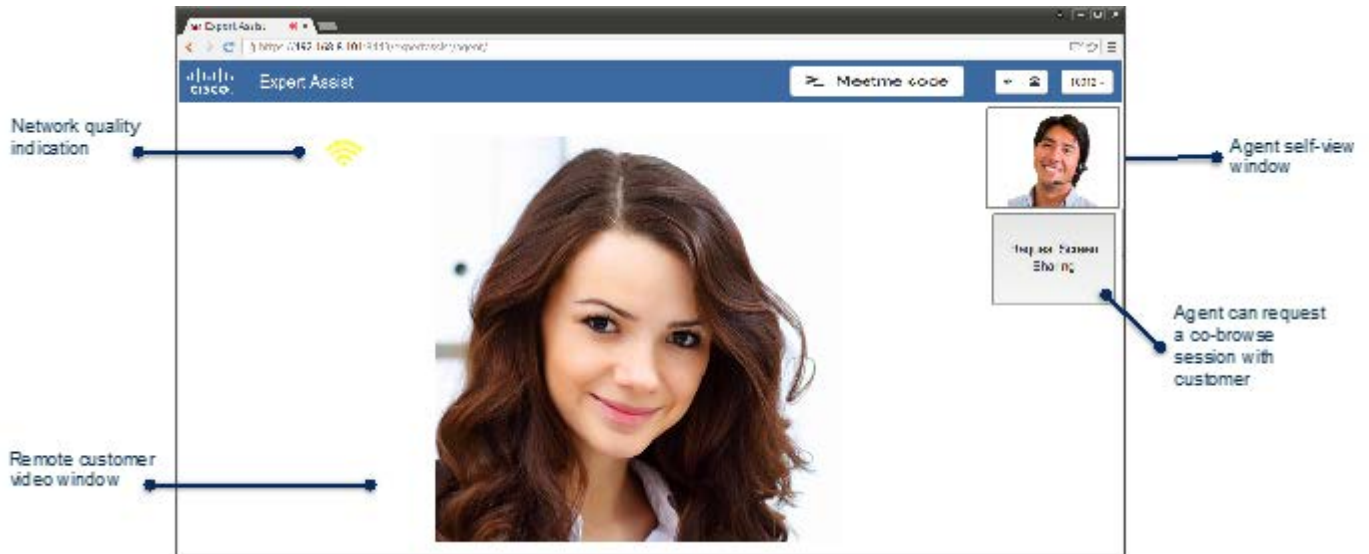
- Prompt (agent clicks button to answer call)
- Away (no calls will be directed to this agent)
- Auto answer (calls automatically answered)



"Off hook" / Active voice and video call—Expert Assist Web Agent Console

When a call is incoming to the expert / agent, the Expert Assist Web Agent Console auto-answers, or the agent clicks the button to answer the call.

Voice will be heard through the headset or speakers on the agent's system. Audio will be transmitted from the microphone on the agent headset or on the PC. The agent's local web cam will be transmitted to the consumer application (Remote Expert enabled website or embedded mobile application). If enabled, the consumer's web cam will be viewable in the remote customer window in the Expert Assist Web Agent Console



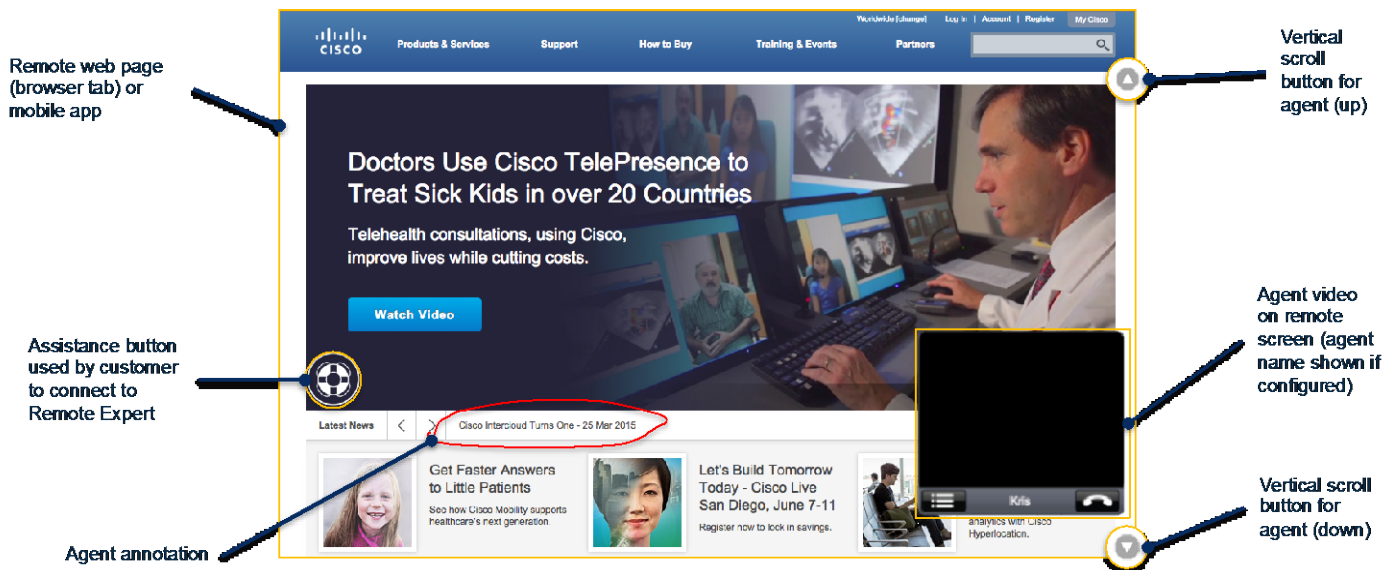
The remote customer video window will be viewable in the Main window area.

The Agent self-view window will be placed in the side bar. It can be brought into the main area, if selected by the agent. All other windows will be found in the side bar.

The agent can request a co-browse session via the "Request Co-browse Session" button in the side bar area.

"Off hook" / Active voice, video and co-browse session—Expert Assist Web Agent Console



When the consumer in their mobile application or web browser has accepted a co-browse session, the Co-browse window is presented to the agent. The agent will be viewing the content of the browser tab of the remote consumer or the application screen of the mobile device. For security, the agent does not have access to the remote consumer's desktop. Portions on the remote screen may be masked or hidden from the agent by the developer in order to protect sensitive information such as passwords, credit card numbers, etc.



While in the co-browse session the Co-browse Toolbar will be displayed.



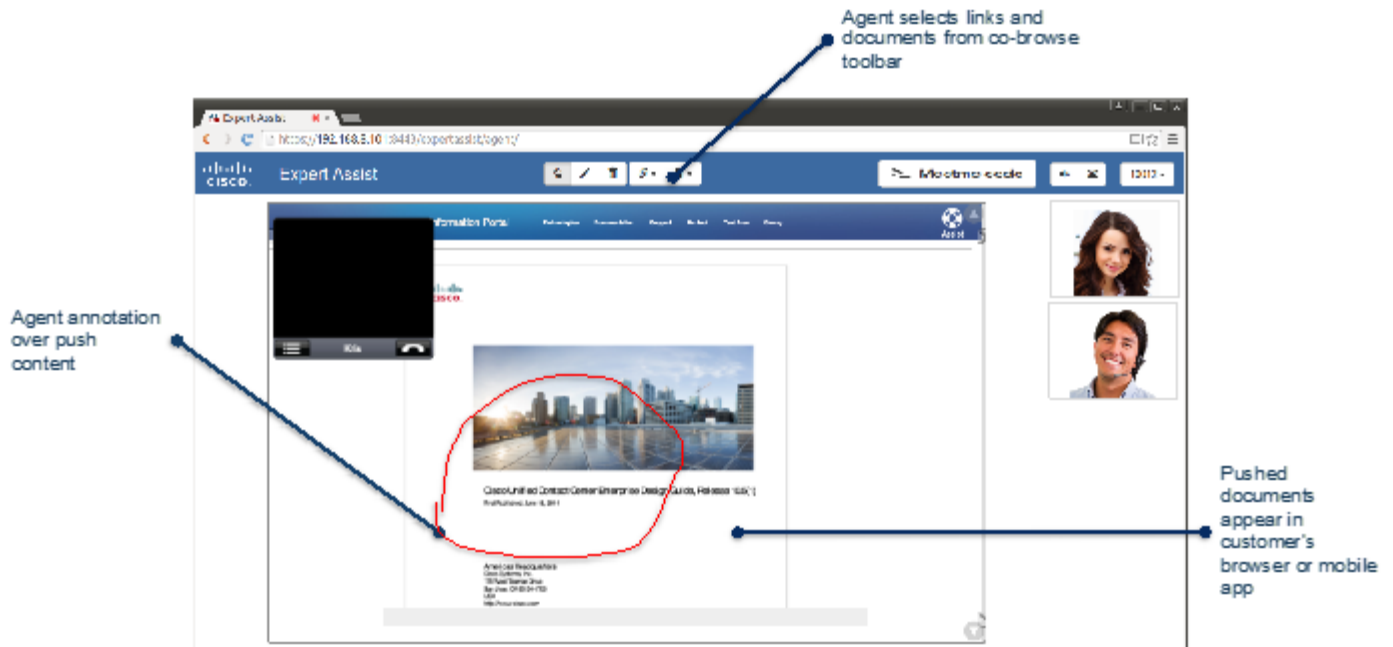
Using these tools, agents can do the following:

- **Point and click in the remote browser**—Agent can click areas of the web site viewed by the consumer, traverse menus. The agent may also focus on a form element and then use their keypad to complete information on the behalf of the remote user. The agent may also vertically scroll the remote screen with the scroll buttons   on the right side of the co-browse window.
- **Annotate**—As depicted above, the agent can draw on the remote screen to highlight specific sections of the remote application or a pushed document.
- **Clear annotation**—The agent uses this to clear annotation.

- **Push a URL or Link**—The agent may push the consumer another Remote Expert enabled link enabling the remote application to jump to a specific web page or portion of the application. These URLs are added via the supervisor in the Expert Assist Web Supervisor Console.

Note: If a URL or Link is pushed while a document is shared then the document window will be closed.

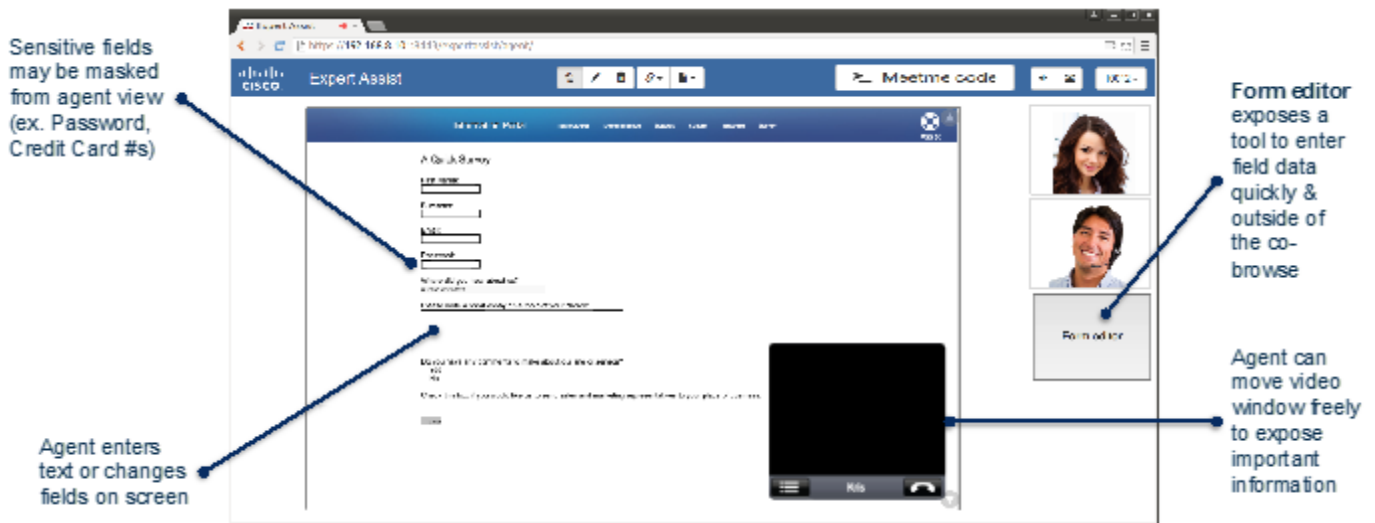
- **Push a Document** (PDF or images)—The agent may push the consumer a document (PDF, or image (PNG, JPEG, GIF) to review. As shown in the following diagram, the document can be jointly browsed, the agent can annotate and the document may be closed.



"Off hook" / Active voice, video and co-browse session with a form—Expert Assist Web Agent Console

When there is a form to be completed by the consumer in the web page or mobile application, the agent can complete visible forms by selecting the field with the Agent Remote Control tool and then typing.

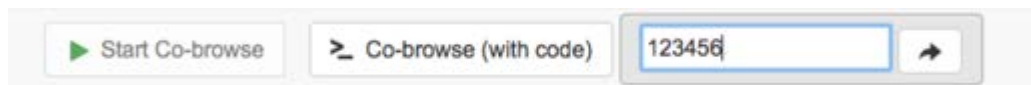
When there is an active form, the Form Editor button will also appear. The form editor button will place a form editor tool in the main window thereby enabling the Agent to quickly co-complete the customer's form.



Co-browse (with code)

Typically, a call uses voice and video from the start, so implementing a co-browse is easily accomplished.

There may be a situation where a customer already has a voice call in progress with an agent, that they need escalate to include co-browsing. To match the customer's screen to the agent's co browse, the customer can display a short code on their screen—when they tell the agent this code, the agent should click the **"Co-browse (with code)"** button and enter this short code (for example, 962013) into the displayed text box.



This enables the agent and consumer to connect to the same support session (see the *Developers Guide* for details of how this short code is obtained).

There is a similar case in which a consumer and agent are already in a support session, and the agent wishes to include a second agent in the same support session. In this case, the agent should click the **"Co-browse (with code)"** button as above, but in this case (because there is already a support session in progress) the console will generate a short code, associate it with the correlation ID of the session, and display it to the agent (again, see the *Developers Guide* for details of how the short code is generated). The agent can then communicate the short code to their colleague, who can follow the procedure above to connect to the same support session.

Sign Out—Expert Assist Web Agent Console

Procedure

Step 1

To sign out, click the user id drop down in the top right of the page. In this drop down is an option to Sign out.



Expert Assist Web Supervisor Console

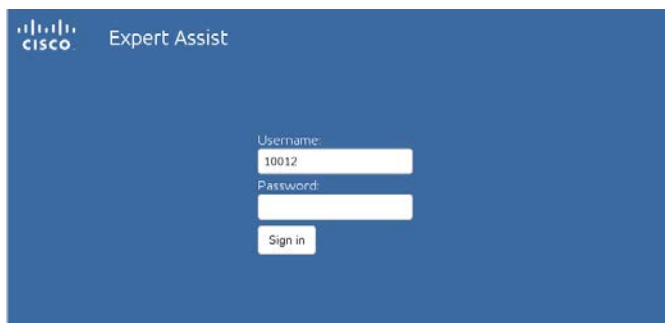
Sign In—Expert Assist Web Supervisor Console

Note: For browser compatibility information, see the *Cisco Remote Expert Mobile—Solution Configuration Guide*.

Procedure

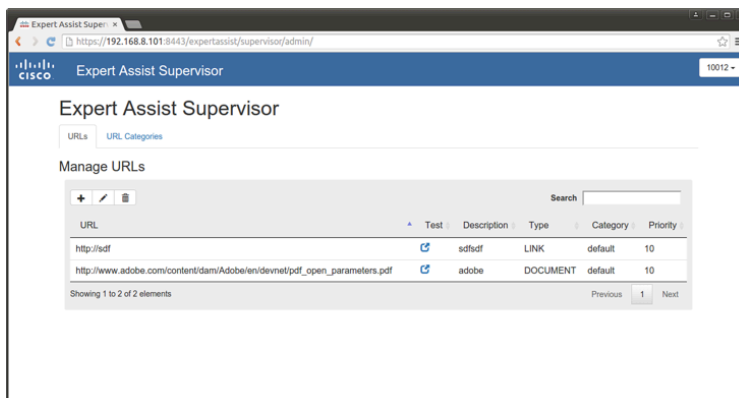
- Step 1** Direct your browser to <https://<hostname or IP address>:8443/expertassist/supervisor/> where hostname or IP address is that of the Remote Expert Mobile Application Server (REAS). You may be asked to accept a security certificate. Contact your administrator for instructions specific to your browser.

This action opens a Sign In page for Cisco Expert Assist Web Agent Console.

The image shows the Cisco Expert Assist Sign In page. It has a blue background with the Cisco logo and 'Expert Assist' text at the top left. In the center, there are two input fields: 'Username' with the value '10012' and 'Password' which is empty. Below these fields is a 'Sign in' button.

- Step 2** As a supervisor, enter the username given to you by your administrator. This will be used to authenticate with Cisco CUCM using the AXL interface and should already be assigned the “Standard CCM Admin Users” role.
- Step 3** For Password, enter your Agent password that was provided by your administrator.
- Step 4** Click Sign In.
- Step 5** A successful sign-in launches the Expert Assist Supervisor Agent interface below.

Successful login will show the Agent Self-view window in the main viewing area.

The image shows the Expert Assist Supervisor Agent interface. It has a blue header with the Cisco logo and 'Expert Assist Supervisor' text. Below the header, there are tabs for 'URLs' and 'URL Categories'. The 'URLs' tab is selected. Under the 'Manage URLs' section, there is a table with columns: URL, Test, Description, Type, Category, and Priority. The table contains two rows of data. At the bottom, there is a pagination bar showing 'Showing 1 to 2 of 2 elements' and 'Previous 1 Next'.

Expert Assist Web Supervisor Console Details

The Supervisor Console can be used to manage content pushed from the expert console to the consumer app:

- URLs
- URL categories

Note: For more information on this feature in the Agent console please refer to the “**Push a Document** (PDF or images)” feature.

Manage Document Add / Edit / Delete URLs

There are two types of URLs available to Agents:

- **LINK URLs**—this type of URL provides a link to a web page. An Agent can choose to ‘push’ one of these links to the customer in order to direct the customer’s browser to a new web page
- **DOCUMENT URLs**—this type of URL provides a link to a file or document. An Agent can choose to ‘push’ one of these documents to the customer and the customer’s browser will display it.

Note: Document URLs should link to PDFs. PDF files should be limited in size as they will be downloaded into the consumer’s application. Load time will vary based on file size (MB) and Internet connection speed. As a practice, these files should not exceed 2 MB.

The supervisor manages (add, edit, delete) these URLs. These URLs appear in a “share” drop down in the agent gadget/console.

URL management screen:

The screenshot displays the 'Expert Assist Supervisor' web interface. The top navigation bar includes the Cisco logo and the text 'Expert Assist Supervisor'. Below this, there are tabs for 'URLs' and 'URL Categories'. The main section is titled 'Manage URLs' and contains a table with the following data:

URL	Test	Description	Type	Category	Priority
http://sdf		sdfsdf	LINK	default	10
http://www.adobe.com/content/dam/Adobe/en/devnet/pdf_open_parameters.pdf		adobe	DOCUMENT	default	10

Below the table, it says 'Showing 1 to 2 of 2 elements'. At the bottom right, there are 'Previous', '1', and 'Next' buttons.

URL properties

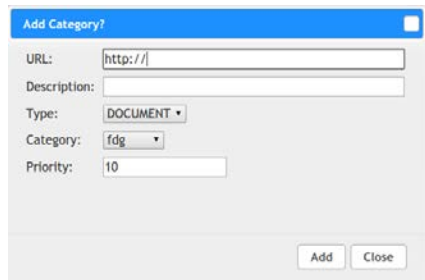
Each URL managed by the

- **URL**—A resolvable URL by the agent. A LINK URL must be resolvable by the consumer application. A DOCUMENT URL must be resolvable by the REAS.
- **Type**—Either 'DOCUMENT' or 'LINK'. DOCUMENT—supported document types (pdf, gif, png, jpeg) can be pushed and displayed on the customer's browser. LINK—represents a web page. When the link is pushed to the customer, their web page will redirect to the LINK URL.
- **Description**—A description of the URL that will help the agent understand how document or link might be used
- **Category** (optional)—The category of the URL. Used to group and categorize similar URLs
- **Priority**—The order that the document should be displayed to the Agent. Higher priority values are displayed first. The default value is a priority of 10; enter a value in the range 10 – 10000.

Adding a URL

Procedure

- Step 1** Sign In to the Cisco Expert Assist Web Supervisor Console
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select the add (+) button above the table. The add dialog will be displayed:



- Step 4** Enter URL, Type, Description, Category and Priority fields.
- Step 5** Click Add. The add dialog will close and the new URL will be added to the URL table. The add dialog will close and the new URL will be added to the URL table.

Editing a URL

Procedure

- Step 1** Sign In to the Cisco Expert Assist Web Supervisor Console
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select Edit (pencil) button. The edit URL dialog will be displayed
- Step 4** Edit the URL, Type, Description, Category and Priority fields.
- Step 5** Click Update. The dialog will close and the updated URL will be added to the URL table.

Deleting a URL

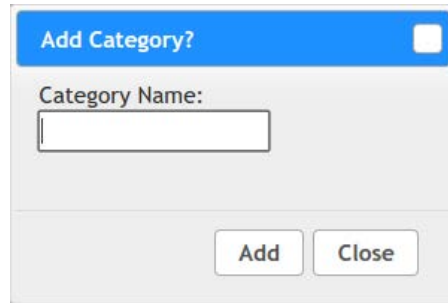
Procedure

- Step 1** Sign In to the Cisco Expert Assist Web Supervisor Console
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select Delete (-) button. The Delete confirmation dialog will be displayed
- Step 4** Confirm. The dialog will close and the URL will be removed from the URL table.

Adding a URL Category

Procedure

- Step 1** Sign In to the Cisco Expert Assist Web Supervisor Console
- Step 2** Select the URL Category tab. A drop down of categories will be displayed.
- Step 3** Select the Add (+) button. The Add dialog will be displayed.

A screenshot of a web-based dialog box titled "Add Category?". The dialog has a blue header bar with the title and a close button (a small white square). Below the header, the text "Category Name:" is followed by a text input field. At the bottom of the dialog, there are two buttons: "Add" and "Close".

- Step 4** Enter the category name and click **Add**. The URL Category will be added to the drop down.

Deleting a URL Category

Procedure

- Step 1** Sign In to the Cisco Expert Assist Web Supervisor Console
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select Delete (-) button. The Delete confirmation dialog will be displayed
- Step 4** Confirm. The dialog will close and the Category will be removed from the drop down.

Sign Out—Expert Assist Web Agent Console

Procedure

- Step 1** To sign out, click the user id drop down in the top right of the page. In this drop down is an option to Sign out.



Co-Browse Behavior

Request for Co-Browse

- When a consumer grants permission for an agent to co-browse, that permission persists—if the agent stops the desktop sharing, and later returns, they do not need to re-request permission, regardless of the length of time between leaving and re-joining. On the user's screen, the normal “This page is currently being shared” message is displayed.

Co-Browse Behavior When Call Is Put On Hold

- When an agent places a call on hold, the co-browse is stopped/paused for all participants—if the call has more than one agent, the co-browse stops for all agents.

Agent Video Window

- When co-browsing, a floating black/grey window appears within the co-browse, to represent what the consumer is seeing. The video of the agent that the consumer sees does not appear in the co-browse at the agent side—the agent would simply be seeing themselves, which would not be beneficial.

Acronym List

Item	Description
CODEC	"Coder-decoder" encodes a data stream or signal for transmission and decodes it for playback in voice over IP and video conferencing applications.
CUCM	Cisco Unified Communications Manager or Unified CM
H.264	Video codec. H.264 is the dominant video compression technology, or codec, in industry that was developed by the International Telecommunications Union (as H.264 and MPEG-4 Part 10, Advanced Video Coding, or AVC). Cisco is open-sourcing its H.264 codec (Open H.264) and providing a binary software module that can be downloaded for free from the Internet. Cisco will cover MPEG LA licensing costs for this module.
REAS	Remote Expert Mobile Application Server
REMB	Remote Expert Mobile Media Broker
UC	Unified Communications
WebRTC	Web Real Time Communications for communications without plug-ins