

Cisco Remote Expert Mobile Version 11.5(1)

Finesse Agent and Supervisor Gadget 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 to Introduction	2016-12-01

About this guide

This guide is intended for Unified Contact Center Enterprise and Unified CCX agents and supervisors who use the Remote Expert Mobile with a Finesse desktop.

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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 Finesse Gadgets Overview	Description of the Finesse Agent and Supervisor Gadget
Finesse Agent Gadget	
Sign In—Finesse Agent Gadget	Procedure for signing into the Finesse Agent Gadget
Finesse Agent Gadget Details	Detailed features and descriptions of the Finesse Agent Gadget
Sign Out—Finesse Agent Gadget	Procedure for signing out of the Finesse Agent Gadget
Finesse Supervisor Gadget	
Sign In—Finesse Supervisor Gadget	Procedure for signing into the Finesse Supervisor Gadget
Finesse Supervisor Gadget Details	Detailed descriptions and procedures for supervisors to manage URLs and URL categories in the web agent console.
Sign Out—Finesse Supervisor Gadget	Procedure for signing out of the Finesse Supervisor Gadget
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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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 font</i> .
[]	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 font</code> .
< >	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 call to 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 Finesse Gadgets 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 thru native libraries.

Finesse Gadgets 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. In addition, for those that do not have Cisco Finesse desktop, 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. For more information, please refer to the Remote Expert Mobile—*Expert Assist Web End User Guide for Agents and Supervisors*.

Finesse Agent Gadget

For Agents—receive calls and co-browse with customers

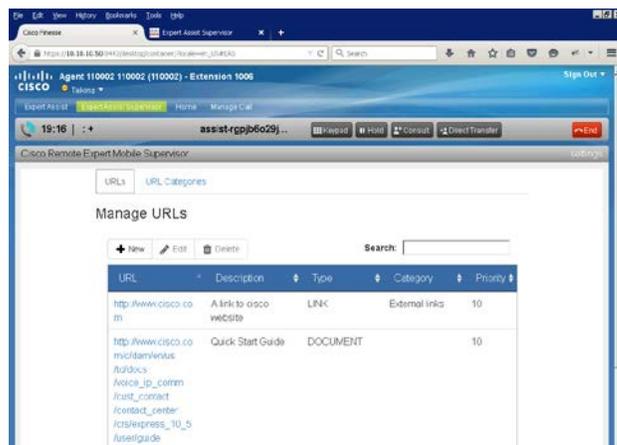


Features:

- Agent Sign in/out
- Co-browse, Remote Control and Annotation
- Co-browse (with code)
- Document and URL push
 - Note:** Document push supports HTTP or HTTPS URLs only, not FTP.
- Transfer and Conference co-browse
- Form Editor

Finesse Supervisor Gadget

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/out
- Manage Pushed Links and Documents
 - Add/Edit/Delete URLs
 - Add/Edit/Delete URL Categories
 - Add/Edit/Delete Documents

Finesse Agent Gadget

Sign In—Finesse Agent Gadget

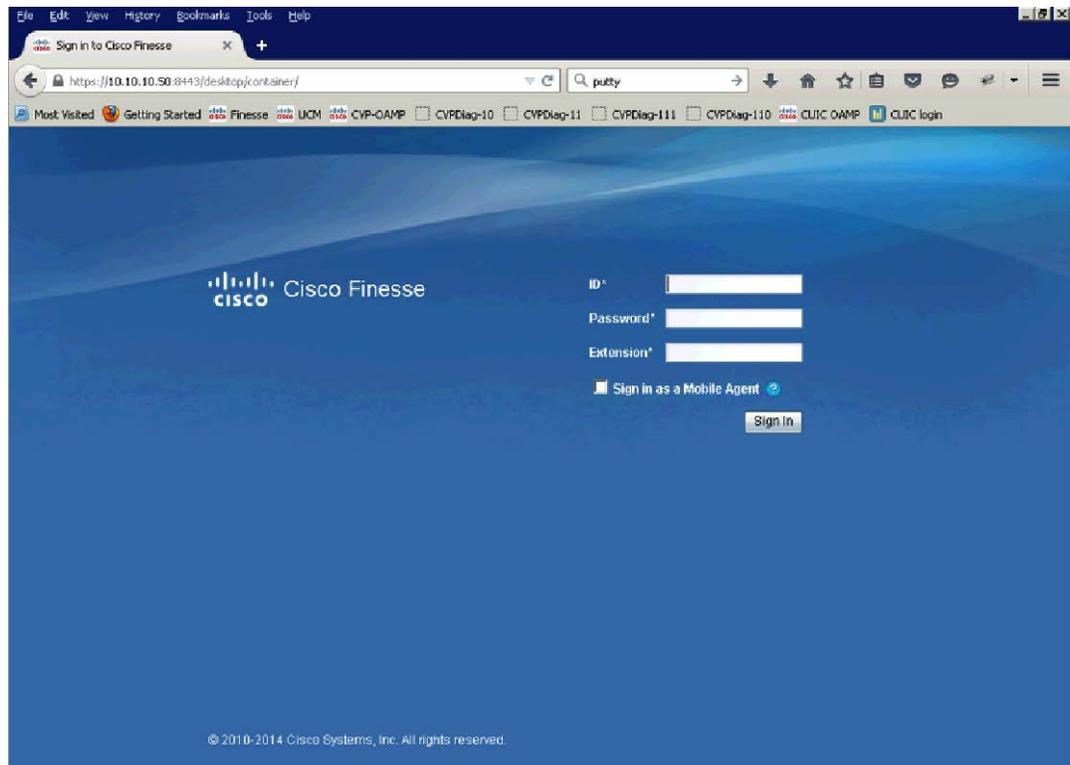
Note: Finesse Gadgets require Internet Explorer version 10.0, Internet Explorer version 11.0, or Firefox v36 or newer.

Procedure

Step 1 Launch the Finesse Desktop and use the standard Finesse sign in procedure as defined in the Cisco Finesse Agent and Supervisor Desktop User Guide.

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 Finesse Agent Console.



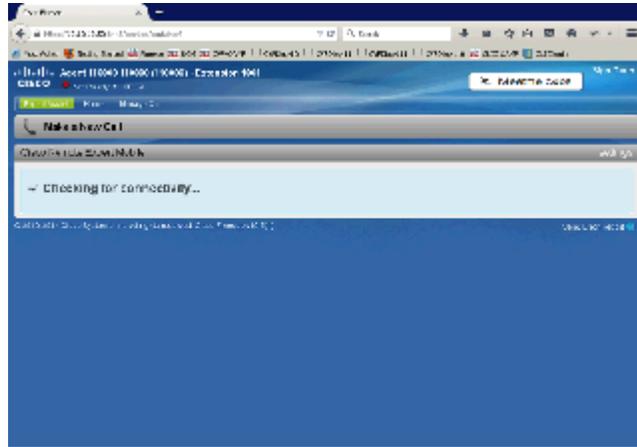
Step 2 As an agent, enter the username given to you by your administrator / supervisor..

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

Step 4 For Extension, enter the phone extension that was provided by your administrator

Step 5 Click Sign In.

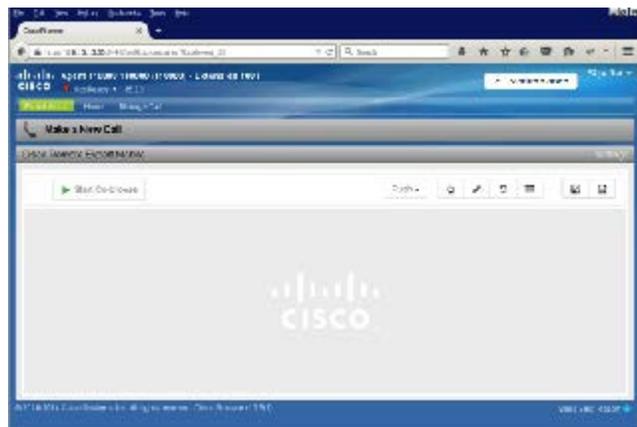
Step 6 After a successful sign-in, the Finesse gadget will attempt to connect with the RE Mobile server. Whilst this check is taking place the following image is displayed.



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

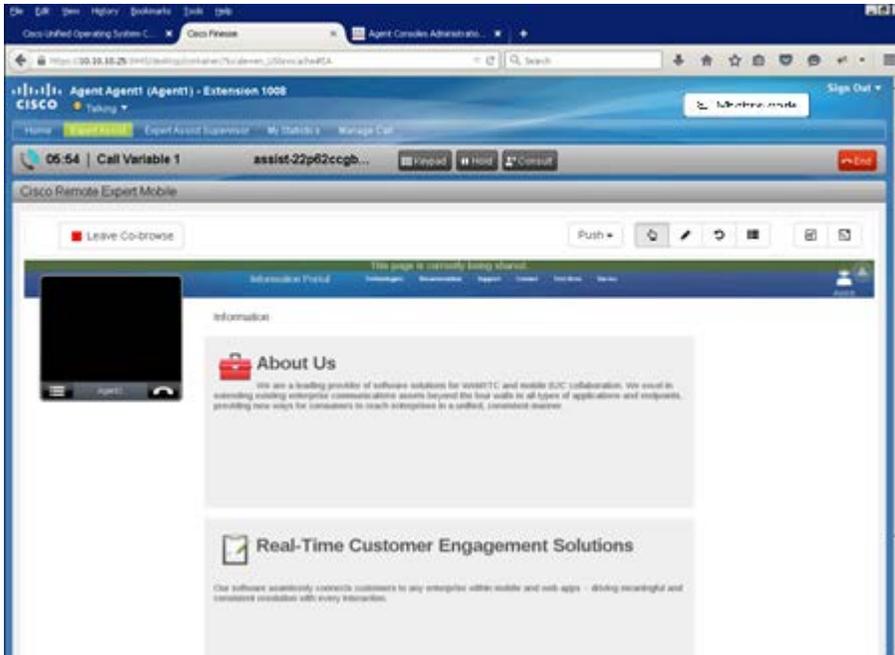
Step 7

Note: Information on the Agent gadget gets enabled upon receiving an assist call through the Remote Expert Mobile application



Finesse Agent Gadget Details

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



- The Finesse Agent Gadget displays the **Co-browse window**—this is a view of the customer’s remote browser tab or mobile application screen (i.e. the co-browse share session)
- At the top of the Finesse Desktop is the Finesse header / other gadgets—this area contains:
 - The Finesse Desktop header which provides the ability to sign out and change agent state. It also has a row of tabs which controls which gadgets are displayed
 - Other gadgets may also be visible. These may be displayed above or below the Expert Assist Agent gadget depending on your particular deployment configuration
- The Expert Assist Agent toolbar—contains buttons and drop-downs relating to the expert assist agent gadget
- The Expert Assist Agent co-browse area—displays the customer’s browser, i.e. the co-browse session

When appropriate, the Finesse Agent Widget presents the following tool bars:

<ul style="list-style-type: none"> ■ Co-browse toolbar 		<p>While in a co-browse session, buttons for Doc/URL Push, Remote control, Annotation, Clear annotation, Form Editor, Expand and Shrink will be shown.</p>
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- **Form editor area**—The form editor area only becomes visible when the consumer browses a page with a form, and the agent clicks the form editor button. The form editor area 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.

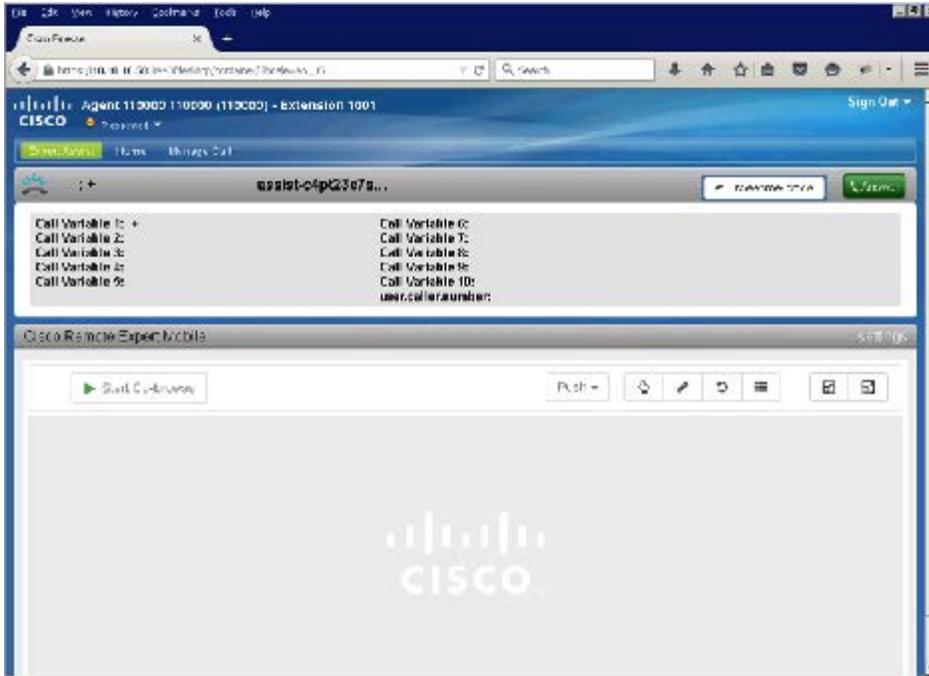
Note: Agents may select specific fields with the pointer and enter them on behalf of the customer within the Co-browse window as well.

Prior to call—Finesse Agent Gadget:

When the Agent is logged in, but not in an active call, co-browse cannot be started until the call is answered.

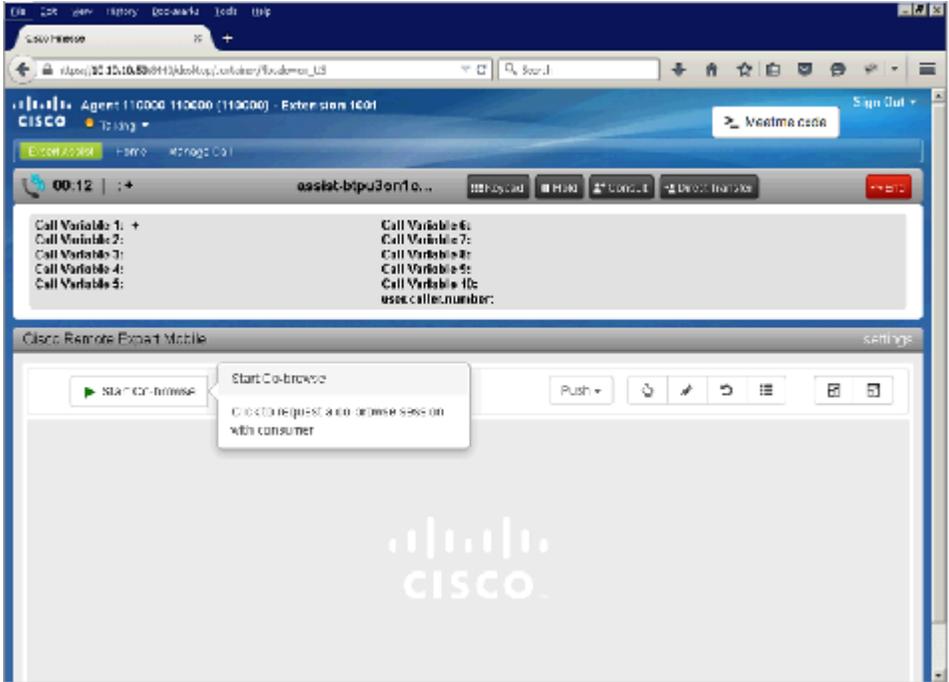
Active voice and video call—Finesse Agent Desktop

When an incoming call is detected, the Finesse Desktop will alert the expert/agent.



Once the call is answered, voice and video will be heard and seen through agent's endpoint or softphone.

The agent can request a co-browse session via the “Start Co-browse” button in the toolbar. Once pressed the agent must wait for the consumer to accept the co-browse session.



While in a co-browse session, the consumer will know that their browser is being shared to the agent as a message (“This page is currently being shared”) is displayed at the top of the screen. The message will disappear when the agent clicks the “Leave Co-browse” button or holds/ends the call.

Active voice, video and co-browse session—Finesse Agent Gadget

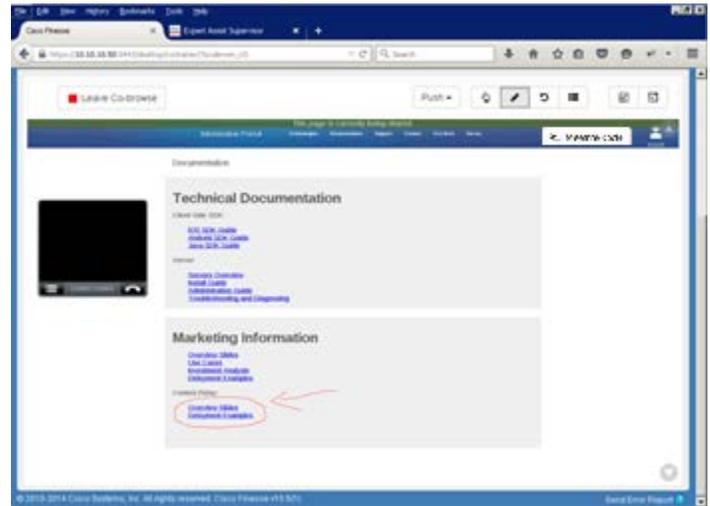
When the consumer in their mobile application or web browser has accepted a co-browse session, the Co-browse window is presented to the agent. The agent will be viewing the content of the browser tab of the remote consumer or the application screen of the mobile device. For security, the agent does not 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.



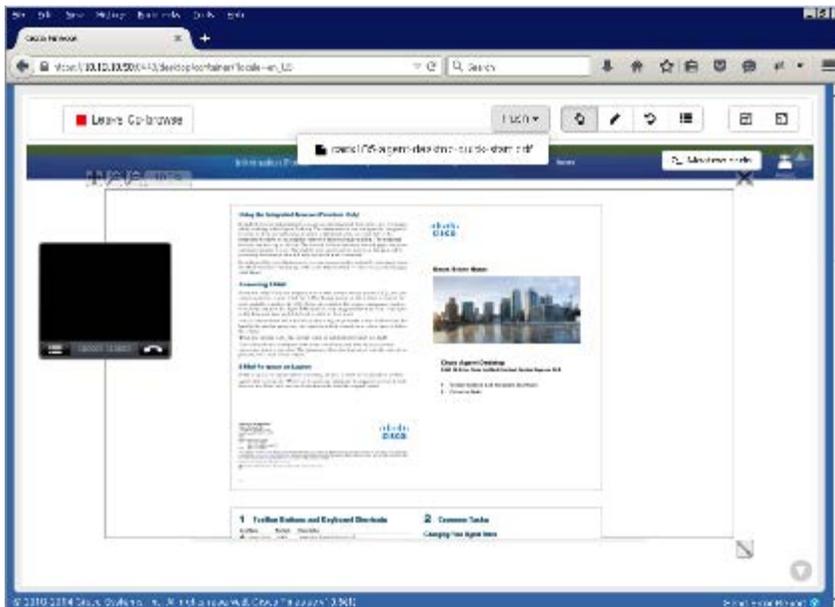
Using these tools, agents can:

- **Point and click in the remote browser**—Agent can click areas of the web site viewed by the consumer, and can 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 in the diagram, the agent can draw on the remote screen to highlight specific sections of the remote application or a pushed document. Annotations will also automatically clear when the screen/page changes or is scrolled.
- **Clear annotation**—The agent uses this to remove previous annotations.
- **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.



The agent can place the user on hold through the finesse desktop or by using the hold button on the phone. The Finesse gadget will end the co-browse session when the agent is no longer talking to the consumer. The co-browse session can be resumed when the agent retrieves the call.

The agent can click "Leave Co-browse" to end the co-browse session whilst the call is in progress. The co-browse session can be resumed by clicking "Rejoin Co-browse" while the consumer is still on the call. Note, the consumer will not be prompted to accept the co-browse session.

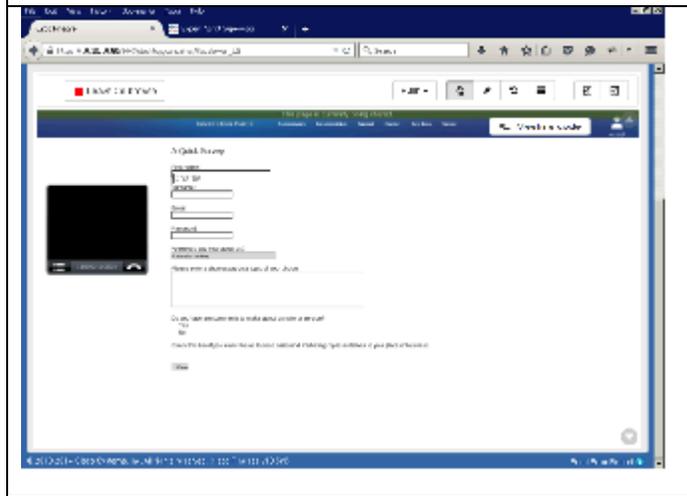
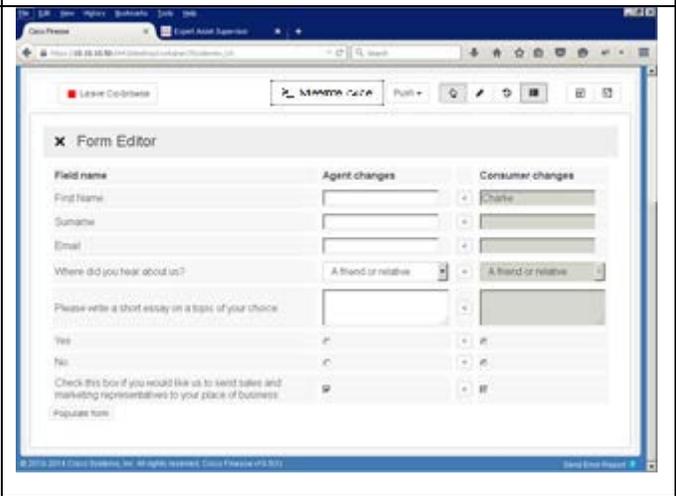
The consumer will know when co-browse is being shared as a sharing message banner is displayed at the top of the screen.

Direct Transfer—If the agent performs a direct transfer the co-browse session will end as the consumer is transferred to another agent. The agent cannot rejoin the co-browse session.

Consult Transfer—A consult transfer will exhibit the following behavior:

- While on the consult call the co-browse session is ended. The agent cannot see the consumer screen when the agent is not talking to the consumer.
- The first agent can click retrieve, transfer or conference during the consult call
 - **Retrieve**—the co-browse session can be resumed as the call with consumer resumes.
 - **Transfer**—the co-browse session will permanently end (cannot be rejoined) after the call is transferred to the other agent
 - **Conference**—the co-browse session can be resumed as the call with consumer is placed in a conference. The second agent can choose to join co-browse by clicking “start co-browse” button. The customer will not get a new request to approve the co-browse session if the request is approved once in the entire call duration. In the conference call, if the first agent has not requested to enable co-browse, and the second agent requests to enable co-browse, then a request will be sent to the customer for the customer to approve.

Active voice, video and co-browse session with a form—Finesse Agent Gadget

<p>Complete forms on the co-browse window—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.</p> <p>The agent’s changes will be sent when the agent presses Enter or Tab.</p>	<p>Complete forms using the Form Editor tool—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.</p> <p>The agent’s changes will be sent when the ‘populate form’ button is clicked.</p>
	

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—Finesse Agent Gadget

The standard Finesse sign out procedure as defined in the *Cisco Finesse Agent and Supervisor Desktop User Guide* document should be followed.

Finesse Supervisor Gadget

Sign In—Finesse Supervisor Gadget

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

Procedure

Step 1 Launch the Finesse Desktop and use the standard Finesse sign in procedure as defined in the Cisco Finesse Agent and Supervisor Desktop User Guide. 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 Finesse Supervisor Gadget.

Step 2 As a supervisor, enter the username given to you by your administrator.

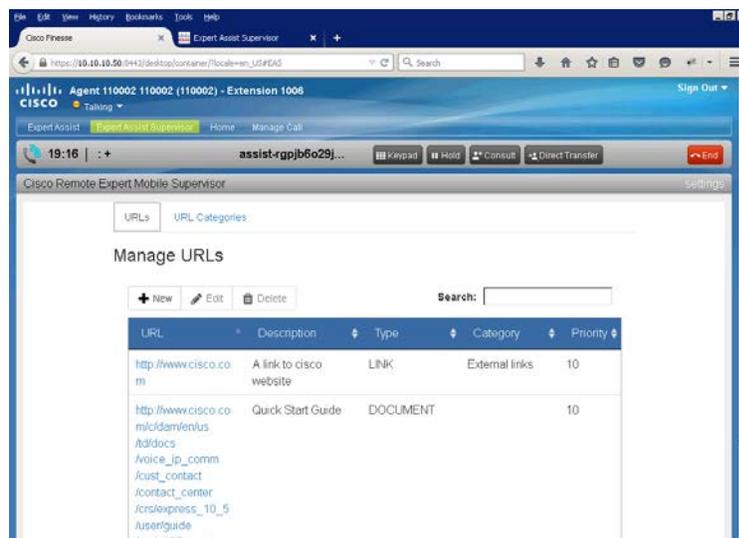
Step 3 For Password, enter your Agent password that was provided by your administrator.

Step 4 For Extension, enter your phone extension that was provided by your administrator.

Step 5 Click Sign In.

Step 6 A successful sign-in launches the Expert Assist Supervisor Agent interface below.

Successful login will show the URL list window in the main viewing area.



Finesse Supervisor Gadget Details

The Supervisor Gadget can be used to manage content pushed from the Agent console to the consumer app:

- URLs
- URL categories

Note: For more information on this Agent console feature please refer to **Push a URL or Link** above.

Manage Document Add / Edit / Delete URLs

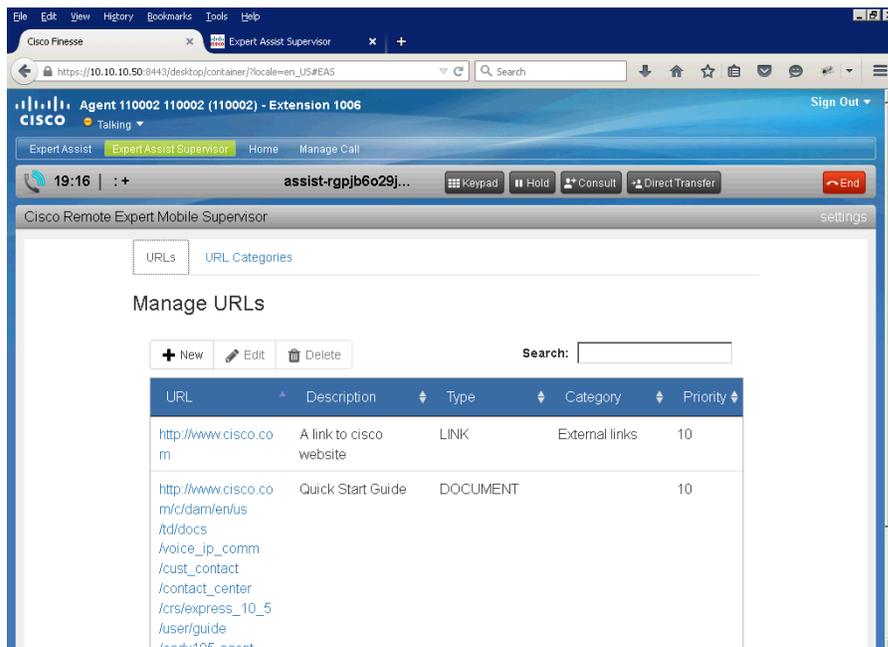
There are two types of URLs available to Agents:

- **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 best practice, these files should not exceed 2 MB.

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

URL management screen:



URL properties

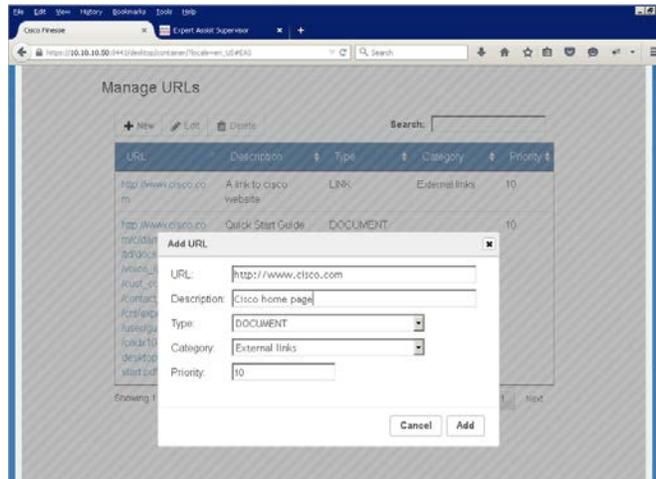
Each URL managed by the

- **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, and must end with the document’s extension type. EG .../userguide.pdf
- **Description**—A description of the URL that will help the agent understand how document or link might be used
- **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.
- **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 will be displayed first.

Adding a URL

Procedure

- Step 1** Sign In to the Finesse Supervisor Gadget
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select the New (+) button above the table. The add dialog will be displayed:



- Step 4** Enter URL, Description, Type, Category and Priority fields.
- Step 5** Click Add. 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 Finesse Supervisor Gadget
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select the row to edit in the table and then click 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 updated in the URL table.

Deleting a URL

Procedure

- Step 1** Sign In to the Finesse Supervisor Gadget
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select the row to delete in the table and then click Delete (trashcan) 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.

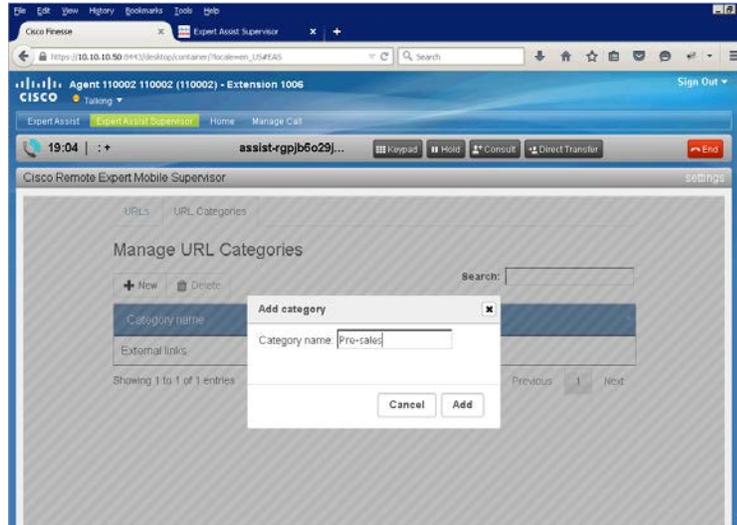
URL Categories

URL categories are like Windows folders, used to group similar documents and links. URL categories help agents more easily find related documents and URLs.

Adding a URL Category

Procedure

- Step 1** Sign In to the Finesse Supervisor Gadget
- Step 2** Select the URL Category tab. A drop down of categories will be displayed.
- Step 3** Select the New (+) button. The Add dialog will be displayed.



- 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 Finesse Supervisor Gadget
- Step 2** Select the URL tab. A table with URLs will be displayed
- Step 3** Select the row in the table to delete and then click Delete (trashcan) 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—Finesse Supervisor Gadget

The standard Finesse sign-out procedure as defined in the *Cisco Finesse Agent and Supervisor Desktop User Guide* document should be followed.

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.
G.711	PCMU/A 8-bit audio codec used for base telephony applications
G.729a	Low-bitrate audio codec for VoIP applications
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.
Opus	Low bit rate, high definition audio codec for VoIP applications. Opus is unmatched for interactive speech and music transmission over the Internet, but is also intended for storage and streaming applications. It is standardized by the Internet Engineering Task Force (IETF) as RFC 6716 which incorporated technology from Skype's SILK codec and Xiph.Org's CELT codec (www.opus-codec.org)
REAS	Remote Expert Mobile Application Server
REMB	Remote Expert Mobile Media Broker
VP8	Video codec—VP8 is a video compression format owned by Google. Google remains a staunch supporter of VP8 after buying On2 Technologies in 2010; Google then released VP8 software under a BSD-like license, as well as the VP8 bitstream specification under an irrevocable license, and free of royalties. VP8 is roughly equivalent in processor usage, bandwidth, and quality to H.264.
WebRTC	Web Real Time Communications for communications without plug-ins