

Moderro

Remote Expert Manager

Administration Guide

Release 11

Moderro Technologies

www.moderro.com

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Preface



Note

All advertising materials mentioning features or use of this software must display the following acknowledgement: "*This product includes software developed by the University of California, Berkeley and its contributors.*"

Overview

This preface describes the audience, purpose, and organization of the Moderro Remote Expert Manager Administration Guide for Release 11.0. It also provides information on related documentation. This preface includes the following sections:

- Audience
- Purpose
- Organization
- Related Documentation

Audience

This guide is intended for administrators who will add and configure expert types, agents/experts, kiosks, videos, documents, and surveys. This guide also shows administrators how to design and configure the user interface.

Purpose

This guide provides the information you need to administer and manage the solution after it has been deployed. This guide contains information about the following topics:

- Moderro Remote Expert Administration Console (REAC)
- User interface graphics specification for the Moderro Remote Expert Manager (REM)
Moderro Remote Expert Interactive Collaboration (REIC) user interface

Organization

This guide is organized into these chapters:

Chapter / Appendix	Title	Description
1	Remote Expert Administration Console (REAC)	Explains how to add and modify locales, expert types, experts, video files, content images, documents, session result questions and answers, and customer pods (kiosks).
2	User Interface Design Specification	Provides the user interface graphics specifications for REM.

3	Remote Expert Interactive Collaboration (REIC) User Interface Configuration	Describes how to customize the appearance of the REIC user interface.
4	Remote Expert Agent Desktop Configuration	Explains how to configure READ states and Finesse
A	Configuring the Video URL	Provides the video URL for different video types.
B	Checking the Postgres Database	Explains how to check if the Postgres database is running.
C	Frequently Asked Questions (FAQs)	Provides answers to commonly asked questions.
D	Acronyms	Provides acronyms used in this guide.

Related Documentation

These documents provide additional information about the Moderro Remote Expert Smart Solution:

Moderro Remote Expert Manager Installation Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Moderro Remote Expert Manager Agent Workstation Setup Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Moderro Remote Expert Manager Port Usage Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-installation-guides-list.html>

Moderro Remote Expert Manager Troubleshooting and Serviceability Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-troubleshooting-guides-list.html>

Moderro Remote Expert Manager eREAD User Guide

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-user-guide-list.html>

Moderro Remote Expert Manager Release Notes

<http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-release-notes-list.html>

Remote Expert Administration Console (REAC)

Chapter Overview

This chapter is intended for administrators who will install, configure, and manage the Remote Expert

Administration Console (REAC). This chapter explains how an administrator will add and modify locales, expert types, experts, video files, content images, documents, session result questions and answers, and customer pods (kiosks).

Topics in this chapter include:

- “Introduction”
- “REAC User Interface (UI)”
- “Configuring a Locale”
- “Configuring an Expert Type”
- “Configuring a Kiosk”
- “Configuring Groups of Kiosks”
- “Configuring an Expert”
- “Configuring Desktop Share”
- “Configuring a Video”
- “Configuring Content”
- “Configuring a Document”
- “Viewing Session Information”
- “Viewing the Status of the Databases”
- “Managing a LongPen Tablet”
- “Managing Licenses”
- “Configuring Session Result”
- “Managing Users”
- “Generating Session Reports”
- “Uploading Images to REAC”
- “Cleaning the Call Cache”
- “Setting Document Camera Predefined Zoom Buttons for Agents”
- “Downloading the Desktop Share Utility File”
- “Downloading the SNMP MIBs for NMS File”
- “Downloading Logs”

Introduction

The Moderro® Remote Expert Administration Console (REAC) application provides a graphical user interface for remotely administering the components of the Remote Expert (RE) solution. RE administrators can remotely provision new customer sites, configure expert types representing Cisco Unified Contact Center Express (UCCX) and Unified Contact Center Enterprise (UCCE) queues, experts, and content used during the session, or configure survey questions displayed at the Remote Expert Interactive Controller (REIC) at the end of the session.

REAC User Interface (UI)

Browser Compatibility

REAC is compatible with multiple browsers and versions including Internet Explorer (IE) 11 and Mozilla Firefox 46.0.1.

Admin Username and Password

The Admin username and password are **admin** by default. The Admin password can be changed after logging into the REAC.

To change the password, follow these steps:

-
- Step 1** Click the down arrow next to admin in the upper right corner and choose **Change Password**.
 - Step 2** In the Change Password dialog box, enter **admin** for the Current Password field. Then enter a new password in the Password Text and Confirm Password fields. Click **Change**.
-

Access the REAC UI

-
- Step 1** To access the REAC UI, enter its URL into a supported web browser. Its URL is the REM hostname or REM IP address followed by “/reac”: **https://<hostname>:8443/reac** or **https://<REM_IP>:8443/reac**.



Note The hostname needs DNS update to map to the REM's host address. The REAC login page appears.

- Step 2** Enter the username in the Username field.
 - Step 3** Enter the password in the Password field.
 - Step 4** Click the **Log In** button.
The REAC UI home page will appear.
-



Note By default, the user will be logged out of REAC if the session is idle for more than 50 minutes.

REAC Home Page and Tabs

The home page displays tabs that the administrator can edit to configure the REM. The tabs are:

1. **Locale** – By default this tab is displayed as the home page after log in. In this screen, an administrator can configure language variants that customers can use in the REIC.
2. **Expert Type** – An administrator will configure various expert UCCX/UCCE pilot numbers to be displayed on the REIC. An administrator can also configure queue videos, caption, and images

for various expert types.

3. Kiosk – An administrator configures new customer pods with TP information and IEC information.
4. Group – Use this tab to group kiosks based on locale(s) and expert types(s). The REIC user interface can be customized for each group.
5. Expert – An administrator configures remote experts.
6. Desktop Share – Use this tab to configure agents' workstations in order to enable desktop sharing.
7. Video – In this screen, an administrator adds video files and modifies settings for those videos that will be used by the remote experts during sessions. An administrator can also configure the default On Hold video to be displayed on the REIC.
8. Content – An administrator can configure the times throughout the week when a static graphic image or a content URL is to be displayed on the TP screen when the customer pod is idle.
9. Document – An administrator uploads document files to the REM in this tab. The documents appear in the agent's eREAD. The agent can then print these documents to the printer in the customer pod.
10. Session – The administrator can view past calls and access their audio recordings.
11. DB Cluster – The administrator can view the status of the Postgres databases for the given nodes.
12. LongPen – The administrator can view the status of the LongPen tablets and writers.
13. Licensing – The administrator can upload Remote Expert Agent licenses. A license is required for each agent.
14. Session Result – An administrator can add and modify survey questions that will be displayed on the customer pod at the end of a session in order to collect session results from customers. An administrator can add and modify agent questions that agents can provide in eREAD.
15. Manage Users – The administrator can create new Administrator and Guest privilege logins for the REAC.
16. Report Tool – An administrator can generate and download agent session and customer session reports as well as session information with customer follow up reports.
17. Clean Call Cache – The administrator can clean the call cache of a kiosk if a session hangs.
18. Document Camera – The administrator uses this tab to set up four predefined zoom buttons on the document camera application.
19. Download Apps – Use this tab to download application files including the Desktop Share Utility, Snapshot Capture App, and SNMP MIBs for NMS.
20. Download Logs – The administrator downloads logs from REAC, RESC, eREAD, and the Tomcat service as well as a list of RE events.

Filter

On pages that contain tables, such as the Locale, Expert, Expert Type, Video, Content, Document, Kiosk, Link, Session, and Session Result pages, a Filter button appears in the upper right corner of the tables.

Click the **Filter** button to view filter fields above the columns of that table.

If you want to filter the entries of a particular column, enter a value in the filter field above the column. Only the entries containing that value will be shown. For example, if the term "french" is entered in the filter field

above the Locale column, only the entries belonging to the French Locale will be displayed.

To show all entries, clear the search field by clicking the X within the filter field.

You can also use the filter to sort columns that contain numerical values. For example, the IEC Serial Number column in the Kiosk page can be sorted either with the lowest number first or highest number first. Click the arrow in the upper right corner of the filter to sort the entries.

If you want to hide the filter fields, click the **Filter** button again.

Configuring a Locale

Locales are the languages that the customer pods support. One locale is the default locale. Other locales can be made available to a customer pod when configuring it.

A Google Translate API is included with the solution. The API provides a translation of the default English customer pod screen text to dozens of languages.



Note In order for the translation to occur using the Google Translate API, the REM server must have access to the Internet.

Add a Locale

To add a new locale, follow these steps:

Step 1 Click the **Locale** tab.

Step 2 Click the **Add** button.

The Add Locale dialog box appears.

Step 3 From the Locale drop-down list, choose a locale.

Name of the locale will automatically appear. Modify the locale name if needed.



Note Multiple variants of the same locale can be added. For example, English locale can have English-US and English-UK as the variants.

Step 4 Enter a description of this locale in the Description field.

Step 5 Click **Browse** next to the Image field to find and upload an image for the language button that will appear on the customer pod's home screen.

Step 6 Click **Add/Modify Message Bundle** to view the Resource Bundle file.

The Locale Properties pop up window will open and display the Locale Properties for that particular language.

Step 7 If you have uploaded images into REAC using the Upload Image tool (see the "Uploading Images to REAC" section of this chapter for instructions and information), replace the file names with those that were generated by the Upload Image tool.



Note Only enter the last part of the URL generated from the Upload Image tool starting from "/images/".

Step 8 Now you will verify the translation.

- If the REM server has access to the Internet, a translation of the text will replace the original English text.
 - If you are satisfied with the results of the Google translation, scroll to the bottom of the

window and click the **Update** button. Click **Add** to add the new locale.

- If you want to modify some or all of Google’s translations:
 - a. Replace Google’s translations in the text fields with your own translations.
 - b. When finished, scroll to the bottom of the window and click the **Update** button.
 - c. Click **OK** in the Info pop up box.
 - d. Click the red round button in the upper left corner to close the Locale Properties window.
 - e. Click **Add** to add the new locale.
 - If REM server does not have access to the Internet, you will see a message that the Google server is not accessible.
 - a. Click **OK** to proceed with manual translation.
 - b. In the Locale Properties pop up window, replace the English text with translations.
 - c. When you have finished translating, scroll to the bottom of the window and click the **Update** button.
 - d. Click the red round button in the upper left corner to close the Locale Properties window.
 - e. Click **Add** to add the new locale.
-

Modify a Locale

To modify an existing locale, follow these steps:

-
- Step 1** Click the **Locale** tab.
 - Step 2** Click the **Modify** button.
The Modify Locale dialog box appears.
 - Step 3** Make changes.
 - Step 4** Click the **Update** button to save the changes.
-

Configuring an Expert Type

The Expert Type screen displays the list of expert types configured in the REM. These expert types are the UCCX/UCCE pilot numbers where the call is queued and then redirected to the next available agent (expert) under the respective expert type configured in the UCCX/UCCE.

Add an Expert Type

To add a new expert type, follow these steps:

-
- Step 1** Click the **Expert Type** tab.
 - Step 2** Click **Add**.
The Add Expert Type dialog box appears.
-

- Step 3** To create a new expert type, enter a name such as "Mortgage Origination" in the Expert Type field. Other examples of expert type names are "Commercial Banking" and "Wealth Management". Otherwise choose the **Help** or **Reschedule** expert type by clicking the drop-down menu in the Expert Type field.
- Step 4** Enter the pilot number of the expertise from UCCX/UCCE in the IVR Phone Number field. To view the field's parameters, click the field.



Note The ExpertType+Locale combination should be unique and the IVR number for the expert type should be same irrespective of the locales. For example, if the "Commercial Lending" expert type group has four locales (English, Spanish, French, and German) then the IVR number for the "Commercial Lending" group should be same for all locales.



Note The help number can be a hunt group number in CUCM with which any call for help can be sent to the help desk team who are not part of UCCX/UCCE.

- Step 5** From the Locale drop-down list, choose the locale for this expertise; the locale corresponds to the language that the experts speak. The expertise will be triggered from the customer pod based on the locale chosen.
- Step 6** Choose a Queue Video, which is also known as the Wait Video. This video will be shown on the customer pod when the customer initiates a call from the customer pod using the given Expert Type. Refer to the "Configuring a Video" section for instructions on how to add these videos. If no video is chosen, the default Queue Video will be streamed.
- Step 7** Enter text for the caption that will appear below the image for the expert type on the customer pod screen. The same caption will also replace <<EXPERT_TYPE>> in the screen.call.connecting message inside the Locale Properties window.
- Step 8** Click **Browse** to find and upload an image without a caption so that it is language-neutral. The image will appear on the customer pod screen to represent this expert type. The caption entered above will appear below this image on the customer pod screen.
- Step 9** Click **Add**.

Modify an Expert Type

To modify an existing Expert Type, follow these steps:

- Step 1** Click the **Expert Type** tab.
- Step 2** Choose the expert type record that you want to modify and click its radio button.
- Step 3** Click **Modify**.
The Modify Expert Type dialog box appears.
- Step 4** Make the necessary changes.



Note If you modify the IVR Phone Number, it will update the phone number for all entries of that expert type. For example, suppose the Commercial Lending expert type has the IVR phone number 1133. If it is changed to "1111" in the Spanish entry, the IVR phone number will also change for English, French, and German.



Note If you modify the Expert Type name that is associated with one or more Groups, a popup message

will appear informing that the Locale or Name of the Expert Type cannot be modified.

Step 5 Click **Update** to save your changes.

Delete an Expert Type



Note If a call made from the selected Expert Type is still active, it cannot be deleted.

To delete an Expert Type, follow these steps:

Step 1 Click the **Expert Type** tab.

Step 2 Select the expert type to be deleted.

Step 3 Click the **Delete** button.

A warning message appears.

Step 4 Click **Ok** to delete the Expert Type.



Note If you delete the Expert Type that is associated with one or more Groups, a popup message will explain that the Expert Type cannot be deleted.

Configuring a Kiosk



Note Starting with REM 11.0, the locale is no longer assigned using the Kiosk tab. Instead it is assigned using the Group tab. Please refer to that section below for instructions.

The Kiosk tab displays all the branch sites added to the REM. The kiosk or customer pod is the customer facing touch screen that the customer touches to initiate a call.



Note AnIEC's IP address and maintenance code are displayed in the Kiosk table. After a Kiosk has been added, the maintenance code is automatically pulled from the IEM and populated into the table. An IEC's IP address and maintenance code are required for VNC co-browsing. When the agent clicks the **VNC Co-browsing** button on eREAD, REM pulls the IEC's maintenance code from REAC to enable the IEC's VNC viewer.



Tip A quick way to determine to what group a kiosk is associated is to look at the Group column of the Kiosk tab. If you see the term 'default', then that kiosk belongs to the default group. Refer to the "Group" section of this chapter to learn how to add that kiosk and others to a group.

Add a Kiosk

To add a new kiosk or customer pod, follow these steps:

-
- Step 1** Click the **Kiosk** tab.
The Kiosk table appears.
- Step 2** Click **Add**.
The Add Kiosk dialog box appears.
- Step 3** Enter a name in the Kiosk Name field. This name should match scheduler account name (e.g. exchange 2008). These names need not to be same as in the IEM, but it is recommended to have uniform naming across the various configurations.
- Step 4** Enter a description in the Description field.
- Step 5** Enter an email address in the Local Support Mail-Id field. This email account will receive notification if errors are detected with the customer pod.



Tip Use commas to separate valid email addresses. Do not include spaces.

- Step 6** Choose the video endpoint type from the Host Type drop-down menu. If using an IEC for a video endpoint, choose **SIP**.
- Step 7** Enter the IP address of the branch TelePresence (TP) video endpoint in the TP IP Address field.
- Step 8** Enter the branch TP directory number registered in the CUCM in the Directory Number field.
- Step 9** In the IEC Serial Number field, enter the unique serial number of the IEC device used for this customer pod.
- Step 10** If the Longpen tablet will be used at this kiosk, choose it from the drop-down menu.
- Step 11** Click **Add**.
-

Modify a Kiosk

To modify the settings of a customer pod, follow these steps:

-
- Step 1** Click a kiosk radio button in the Kiosk tab.
- Step 2** Click **Modify**.
The Modify Kiosk dialog box appears.
- Step 3** Edit the fields as necessary.
- Step 4** Click **Update**.
- Step 5** Now you will need to reboot the IEC. In the Kiosk tab, choose the modified kiosk and click the **Restart** button.

When the IEC is rebooted the following message appears in a pop up box: "The request to restart Kiosk has been delivered". Click **Ok** to continue.



Tip If the IEC at the customer pod does not reboot, the IEC can be rebooted manually. Refer to the *Moderro Interactive Experience Client Series 4600 User Guide* for instructions on how to reboot an IEC manually.

**Note**

If the Video Endpoint IP and Directory Number have been modified, make sure to click **Clean Call Cache** from REAC after updated the kiosk.

View Kiosk Health

To view information about the health of the kiosk, follow these steps:

-
- Step 1** Choose a kiosk.
- Step 2** Click the **Health** button.
- The Kiosk Health window opens.
- Step 3** When you have finished viewing the information, click the **Close** button.
-

Delete a Kiosk

**Note**

If the selected kiosk is currently on an active call, then that kiosk cannot be deleted.

-
- Step 1** Click the **Kiosk** tab.
- Step 2** Choose the kiosk to be deleted.
- Step 3** Click the **Delete** button.
- A warning message appears.
- Step 4** Click **Ok** to delete the kiosk.
-

Configuring Groups of Kiosks

The Group tab allows administrators to group kiosks, customize the screen layout of each kiosk group, and assign locales and expert types to each kiosk group.

**Note**

Upon a fresh install, a 'default' group is created. This is the master copy from which all new groups will be created.

Use the Group tab to:

- Create groups of kiosks - For example, a bank may want to group kiosks based on expert type; there could be a group for business clients, a group for mortgage clients, and a group for clients seeking wealth management. Or the kiosks could be grouped based on locale or location; either may be useful for organizations that have presence in multiple countries.
- Customize REIC layouts - Each group can have a different kiosk screen layout. The Theme parameters section of the Group dialog box allows administrators to arrange the expert type

buttons by selecting the number of rows and columns, the size of the gap between expert type buttons, horizontal and vertical alignment, etc. In addition, administrators can specify the video player dimensions as well as the style, size, and color for expert type, feedback, and rollover fonts. Administrators can also choose whether customers will be prompted to type their identification number using a physical keypad or swipe an identification card using a magstripe card reader connected to the IEC. Image files for the background, logo, signature capture screen, and scan screen are uploaded in this section.

- Choose the locale(s) of a group
- Choose the expert type(s) of a group
- Assign kiosk(s) to a group



Note When a kiosk is first added, it will be assigned automatically to the 'default' group and its screen will reflect the settings in that group.

Add a Group

If more than one group is desired, add groups using the **Add** button in the Group tab.



Tip It is best to add groups after the locales and expert types have been configured.

Step 1 Click the **Group** tab.

Step 2 Click the **Add** button.

Step 3 Enter the name of the group in the dialog box.

Step 4 Set the theme parameters.

The following table shows the list of theme parameters, descriptions, and valid values:

Table 1-1 Theme Parameters

Name	Description	Valid Value
Orientation	Specify whether the expert type buttons are arranged row by row or column by column.	columns, rows
Column Count	Number of columns to be displayed. Set to -1 to allow the REIC to determine the column count automatically. This property is explicitly set if the orientation property is set to columns.	Set the column count for expert type layout. * Numbers only * Allowed minimum value is -1
Row Count	Number of rows to be displayed. Set to -1 to allow the REIC to determine the row count automatically. This property is explicitly set if the orientation property is set to rows.	Set the row count for expert type layout. * Numbers only * Allowed minimum value is -1
Horizontal Gap	Number of pixels between expert type buttons in the horizontal direction.	* Any positive numbers

Vertical Gap	Number of pixels between expert types in the vertical direction.	* Any positive numbers
Hover Scale	Expert type hover zoom factor - control Xscale & Yscale size. *This property is not supported in REM 11.	
Hover Position	Expert type hover zoom factor - control X & Y position. *This property is not supported in REM 11.	
Select Scale	Expert type select zoom factor - control Xscale & Yscale size. *This property is not supported in REM 11.	
Select Position	Expert type select zoom factor - control X & Y position. *This property is not supported in REM 11.	
Vertical Align	Select the alignment in the vertical direction.	top, middle, bottom
Horizontal Align	Select the alignment in the horizontal direction.	left, center, right
Stage Height	Set the percentage of the vertical space after the vertical alignment has been set.	* Any positive numbers
Stage Width	Set the percentage of the horizontal space after the horizontal alignment has been set.	* Any positive numbers
User Identification	A popup appears on REIC when user press on an expert type button. Choose from keyboard, magstripe, null.	null, keyboard, magstripe
Max length for Customer Id	The maximum number of characters when enter customer Id for keyboard module.	* Numbers only * 1 to 18
Default Font	REIC application default font. Font name examples: Sans: FreeSans, DejaVu Sans, Liberation Sans Serif: FreeSerif, DejaVu Serif, Liberation Serif	*Alphabet only
Default Font Size	REIC application default font size.	* Any positive numbers
Video Player Width	Video player width in pixels.	* Any positive numbers

Video Player Height	Video player height in pixels.	* Any positive numbers
Videoplayer Scale Mode	Adjust the size of the playing media after the video player width and height have been set.	none, stretch, letterbox, zoom
Application Caption Header - Y Position	REIC application header vertical space in pixels.	* Numbers only * 0 to 90
Expert Type Rollover Color	Expert type button color when hover on selection	* Only hexadecimal number * Format is 0x000000
Expert Type Selection Color	Expert type button color when selected	* Only hexadecimal number * Format is 0x000000
Expert Type Font Color	Expert type button caption font color	* Only hexadecimal number * Format is 0x000000
Expert Type Font Size	Expert type button caption font size	* Any positive numbers
Expert Type Font Style	Expert type button caption font style	bold, italic, none
Feedback Question Font Color	Feedback question font color	* Only hexadecimal number * Format is 0x000000
Feedback Question Font Size	Feedback question font size	* Any positive numbers
Feedback Question Font Weight	Feedback question font weight	bold, normal
Feedback Question Font Style	Feedback question font style	normal, italic
Feedback Answer Font Color	Feedback answer font color	* Only hexadecimal number * Format is 0x000000
Feedback Answer Font Size	Feedback answer font size	* Any positive numbers

Feedback Answer Font Weight	Feedback answer font weight	bold, normal
Feedback Answer Font Style	Feedback answer font style	normal, italic



Note Refer to the “REIC UI Configuration” section of this guide to see examples of Expert Type button layouts.

Step 5 Upload the image files for the background, small and large logos, and the scan and signature capture screens.

Step 6 Choose all the locales necessary by clicking the boxes.



Note A group cannot have variants of the same locale. If you select multiple regions that is associated to the same locale (e.g. English-US and English-UK), a popup message will ask you to select only one variant of a locale.

Step 7 If more than one locale was chosen above, choose the Default Locale from the drop-down menu.

Step 8 Choose the expert type(s).



Note The only expert types shown in this list will be those that have been configured for the locales that you have chosen above. If more than one locale has been chosen above, then the expert types shown in the list are those that ALL chosen locales have the same expert type name. For example, if you chose English, Spanish, and German and the same six expert types configured for both English and Spanish but only four of them are also configured for German, the list will only show those four that all three locales have the same expert type name.

Step 9 Choose the kiosk(s) that belong to this group.



Note Only kiosks that you have not assigned to other groups will be listed. Kiosks that are in the ‘default’ group will be listed because you have not assigned them yet.

Step 10 Click the **Add** button at the bottom of the dialog box.

Step 11 Clear the IEC media and web caches in IEM.

Step 12 Restart the Application from IEM or reboot the IECs from REAC.



Note Refer to the *Moderro Interactive Experience Manager Installation Guide* and the *Moderro Interactive Experience Manager Administration Guide* for instructions on how to perform the above two steps.

Modify a Group



Warning

If you modify any settings in the 'default' group and save them, those settings will become the "default" settings moving forward. Then when you add a new group, those modified settings will appear in the new group rather than the factory settings.

-
- Step 1** Click the radio button next to the group that you want to modify, and then click the **Modify** button.
 - Step 2** Modify the theme parameters if desired.
 - Step 3** Upload new image files if desired.
 - Step 4** If you want to alter the Locale section, click the **Change** button. After you choose additional locales or remove some, click the **Done** button to save your changes.
 - Step 5** If you made changes to the Locale section and need to change the Default Locale, choose the new locale from the drop-down menu.
 - Step 6** Choose additional expert type(s) or remove some if desired.
 - Step 7** Select additional kiosk(s) or remove those that should no longer belong to this group.



Note

Only kiosks that have been previously assigned to this group or have not been assigned to another group (other than the 'default' group) will be listed.

-
- Step 8** Click the **Update** button at the bottom of the dialog box.
 - Step 9** Clear the IEC media and web caches in IEM.
 - Step 10** Restart the Application from IEM or reboot the IECs from REAC.
-

Delete a Group



Note

You cannot delete the 'default' group.

-
- Step 1** If you no longer need a group, click the radio button next to it and then click the **Delete** button.
 - Step 2** When prompted, confirm that you want to delete it.



Note

Kiosks that are associated with the deleted group will return to the 'default' group.

Configuring an Expert

The Expert tab displays all the call center agents designated as remote experts in the Remote Expert Manager. Experts are the agents configured in CUCM as end-users with IPCC DNs assigned to them. They will be assigned to different skill group or resource group in UCCX/UCCE so that they can receive selective calls. Please refer to the respective UCCX/UCCE SRND for more information on agent routing.

Registration Status

The Registration Status column indicates whether the expert has been successfully registered in the CUCM. If the box is green, the agent is registered. If the box is red, the agent is not registered or the Directory Number (DN) is incorrect. The Administrator can update the expert's registration status by clicking the **Refresh Registration** button.

When there is a dual node setup (i.e. high availability (HA) is used), two columns will be shown under Registration Status. Each box represents a particular REM node. If one of the REM nodes is down, then the corresponding status column will be red for all given experts.

Add an Expert

To add a new Expert, follow these steps:

-
- Step 1** Click the **Expert** tab.
 - Step 2** Click **Add**.
The Add Expert dialog box appears.
 - Step 3** In the Directory Number field, enter the IPCC DN assigned to the expert in the CUCM end-user configuration. The call will be made to this number.
 - Step 4** Click **Add**.
-

Modify an Expert

To modify the DN of an existing Expert, follow these steps:

-
- Step 1** Click the **Expert** tab.
 - Step 2** Choose an expert's radio button.
 - Step 3** Click **Modify**.
The Modify Expert dialog box appears.
 - Step 4** Edit the Directory Number field.
 - Step 5** Click **Update**.
-

Delete an Expert



Note If the selected expert is on an active call, then that expert cannot be deleted.

-
- Step 1** Click the **Expert** tab.
 - Step 2** Choose the expert to be deleted.
 - Step 3** Click the **Delete** button.
A warning message appears.
 - Step 4** Click **Ok** to delete the expert.
-

Configuring DesktopShare

Agents can share their desktop screen using the Desktop Share button on eREAD. The agents' desktop MAC addresses must be added to REAC.

The following is needed to add an agent's desktop to the Desktop Share tab:

1. Agent's desktop MAC address - To get the MAC address of an agent's desktop, do one of the following:
 - 1. Go to the command line and type **ipconfig /all** and press the **Enter** key. Find the Physical Address line. Place your cursor on that line, right-click, choose **Mark**, highlight the MAC address, right-click, and choose **Copy**.
 - 2. Right-click the network icon on the agent's desktop task bar and then click the **Open Network and Sharing Center** at the bottom of the pop-up box. Click the blue Connections link. In the Network Connections Status dialog box, click the **Details** button. Find the Physical Address. and record it.
2. RD Server passphrase from the agent's desktop -The passphrase is a public key, which is a text file generated by the RD Server. To get the passphrase, right-click on the RD Server icon on the task bar and choose **Settings**. In the Setting dialog box, click the **Security** tab. Click the **Show public key** button in the Security tab of the Settings window of the RD Server Settings dialog box. Copy the passphrase and paste it into Notepad or Wordpad. Save the file to the agent's desktop using ANSI encoding.



Note If the RD Server has not been installed on the agent's desktop, refer to the *Moderro Remote Expert Manager Agent's Workstation Setup Guide* for instructions on how to install and configure it.

Add an Agent's Workstation to the Desktop Share Tab

To add an agent's workstation to REAC to enable desktop sharing on it, follow the steps below:

- Step 1** In REAC, go to the **Desktop Share** tab and click the **Add** button.
- Step 2** In the Add Agent Desktop dialog box, enter the MAC address of the agent's desktop.
- Step 3** Enter **6050** for the port.
- Step 4** Enter a password in both the Password and Confirm Password fields. Record this password since it will be entered in the RD server on the agent's desktop during setup.
- Step 5** Click the **Browse** button next to the Passphrase field. Find the passphrase file on the agent's desktop and add it.
- Step 6** Click the **Add** button to save.

The agent's desktop MAC address and port number are displayed in the Desktop Share tab.

Modify a Desktop Share Entry

If you need to change the MAC address, port number, password, or passphrase of an existing entry, follow the steps below:

-
- Step 1** Click on the MAC address of the agent's desktop that must be modified.
 - Step 2** Change the necessary values in the dialog box.
 - Step 3** Click the **Update** button to save your changes.
-

Remove a Desktop Share Entry

-
- Step 1** Click on the MAC address of the agent's desktop that must be modified.
 - Step 2** Click the **Delete** button.
-

Configuring aVideo

The Video tab displays the videos in REM. It is also used to set the On Hold video. There are three types of videos that you will add in this tab:

1. **Wait/Queue video(s):** This video is displayed on the customer pod when the customer initiates a call from it. Different Queue videos can be chosen for different expert types. Queue videos are first added in the Video tab and then the administrator can assign them to expert types in the Expert Type tab.



Note The scheme for default wait video is changed to HTTPS in the sql script itself. This URL is provided until the customer assigns a different wait video and is not applicable for video hosted in AMS.

2. **On Hold video:** The REM always requires a default On Hold video to be designated in the system. When the first video is added to the REM, this field is set to "Yes" by default, making it the On Hold video. When a customer call is put on hold by the agent, the customer pod will display the On Hold video.



Note At any one time there can be only one system-wide default On Hold video.

Once a video has been designated as the On Hold video, you cannot change its On Hold Video setting to "No". Instead, you must set another video as the On Hold video; this video will then become the new default On Hold video for all agents. However, an expert may select any one of the available videos in eREAD as the On Hold video for the current session. After the end of the session, the agent-chosen On Hold video reverts back to the default On Hold video for all subsequent sessions.

3. **Product and service videos:** These videos can be streamed by the agent to the customer pod during sessions.

Add a Video

To add a new video, follow these steps:

-
- Step 1** Click the **Video** tab.
The Videos list is displayed.
-

- Step 2** Click **Add**.
The Add Video dialog box appears.
- Step 3** Enter a category name in the Category field.
- Step 4** Enter a description of the video in the Description field.
- Step 5** If this video should be the video that streams when a customer is placed on hold, choose **Yes** from the On Hold Video drop-downlist.



Note If this is the first video added to the REM, this field will be set to “Yes” by default, making this video the default On Holdvideo.

- Step 6** Enter the URL in the Video URL field. Refer to Appendix A for information regarding the Video URL.
- Step 7** Click **Browse** to upload a thumbnail image that will be used to visually represent the video in the remote expert’s eREAD.



Tip Use a thumbnail image converter to create thumbnail images for all the videos.

Refer to the *Moderro Remote Expert Manager eREAD User Guide* for more information.

- Step 8** Click **Add**.

Modify a Video

To modify an existing video, follow these steps:

- Step 1** Click the **Video** tab.
- Step 2** Choose a video and click its radio button.
- Step 3** Click **Modify**.
The Modify Video dialog box appears.
- Step 4** Edit the fields if necessary.
- Step 5** Click **Update**.

Delete a Video



Note If the selected video is being streamed on an active call, then that video cannot be deleted.

- Step 1** Click the **Video** tab.
- Step 2** Choose the video to be deleted.
- Step 3** Click the **Delete** button.
A warning message appears.
- Step 4** Click **Ok** to delete the video.

Configuring Content

The purpose of this tab is to upload static graphic images, also known as dual content images. A static image or a content URL will be displayed on the TP at the customer pod when no Remote Expert session is in progress. Only one image is displayed at a time but multiple images can be scheduled to display at different times or days.

The image types are listed in the REAC Properties file that is located under the terminal user interface (TUI) account: Main Menu > REM Server Administration > Edit REM Templates > a) REAC Properties. The images can contain branding (e.g. company logo), the name of this solution (i.e. "Remote Expert"), hours of operation, and important announcements. An image can be displayed on all days or just certain days.

The graphic image appears on the TP according to the IEC's time zone. All the IECs configured in REAC will show the same images configured for a particular time slot.

Add a Content Item

To add a new content item for the TP, follow these steps:

-
- | | |
|---------------|---|
| Step 1 | Click the Content tab. |
| Step 2 | Click Add in the Content screen.
The Add Content dialog box appears. |
| Step 3 | Enter a name in the Name field. |
| Step 4 | Supply an image. <ul style="list-style-type: none">• If you wish to supply an URL instead of uploading an image file, uncheck the Upload image checkbox and then enter the URL in the Content URL field. You can enter the URL of a web page (e.g. http://dualcontent.com/index.html) that contains a full-screen image or the URL of an image uploaded into REAC. (See the "Uploading Images to REAC" section of this chapter on how to upload an image to REAC and generate its URL.)• If you wish to upload an image rather than supplying an URL, check the Upload image check box and then click Browse to find and upload an image that will appear on the customer pod's TP. |
| Step 5 | From the Day of Week drop-down list, choose which day the image should appear or All Days. |
| Step 6 | In the Starts From field, enter the time in hours, minutes, and seconds that the image should start displaying. |
| Step 7 | In the Ends At field, enter the time in hours, minutes, and seconds that the image should stop displaying. |
| Step 8 | Click Add . |

The image will appear on the TP at the customer pod according to the day and time configured.

Modify a Content Item

To modify a content image, follow these steps:

-
- | | |
|---------------|--|
| Step 1 | Click the Content tab. |
| Step 2 | Choose the content item that you want to modify. |
| Step 3 | Click Modify . |
-

The Modify Content dialog box appears.

Step 4 Edit the fields as necessary.

Step 5 Click **Update**.

Delete a Content Item

Step 1 Click the **Content** tab.

Step 2 Choose the content item to be deleted.

Step 3 Click the **Delete** button.

A warning message appears.

Step 4 Click **Ok** to delete the content item.

Configuring a Document

The purpose of the Document tab is to upload documents that can be printed at a customer pod's printer that is connected to an IEC or shared with a customer who is using a mobile device. The uploaded documents are visible in eREAD. The document types supported, such as text, txt, pdf, jpg, jpeg, png, bmp, gif, jfif, and jpe, are listed in the REAC Properties file located under the TUI account: Main Menu > REM Server Administration > Edit REM Templates > a) REAC Properties.

Add a Document

To add a new document, follow these steps:

Step 1 Click the **Document** tab.

Step 2 Click **Add**.

The Add Document dialog box appears.

Step 3 Enter a category name in the Category field.

Step 4 Enter a description in the Description field.

Step 5 Click **Browse** to find and upload a document file.

Step 6 Click **Add**.

Modify a Document

To modify a document, follow these steps:

Step 1 Choose a document radio button in the Document tab.

Step 2 Click **Modify**.

The Modify Document dialog box appears.

Step 3 Edit the fields as necessary.

Step 4 Click **Update**.

Viewing Session Information

In the Session tab, the administrator can view the past calls made using the REM. The administrator can also access the audio recording made for each call.

Click the **Session** tab to view the list of sessions.

By default, the sessions are sorted by status with active calls on top (i.e. Completed, On Hold, and Abnormal Disconnect) and with start time in descending order.

Help Popup Window

The Session page contains a Help button which when clicked opens a popup window. This Help window contains information to help you filter the sessions and find what you need.

Sort the Sessions List

Sort the data by clicking a column heading. Sorting is always done first based on status and then based on the user-selected column.

Use the Scroll Bar to View All the Records

Initially only 25 records are displayed in the list. If you want to view more records, use the scroll bar.

Use Quick Filtering

Quick filtering is a feature that sorts the Start Time, End Time, Agents, and Kiosk DN fields. Choose **Quick Filter** from the drop down list or click the **Quick Filter** icon.

- Start Time or End Time: Use the format yyyy-MM-dd HH:mm:ss.
- Experts: Enter a number that is contained within the Expert DN.
- Kiosk DN: Enter a number that is contained within the DN.

Refresh the Sessions List

Click the **Refresh** button to fetch all the latest records.

View Details of a Call

Select a record and click **View Details**. The Call Details window will open with the details for the selected RE session.

Play Audio Recording of the Call

To play an audio recording of a call, you will need the following:

- Apple QuickTime Player plug-in if you are using Internet Explorer 11



Note If you are using Mozilla Firefox 46.0.1, there is no need to install the player plug-in.

- Credentials for the media server where the audio recordings are being stored

Step 1 In the Call Details dialog box, click the call record.

Step 2 In the QuickTime Internet Authentication pop up box, enter the username and password of the MediaSense server.

Step 3 Click **OK**.



Note If you are using MediaSense version 10.5(1) or above, make sure to add the MediaSense self-signed certificate into the Trusted Root Certification Authorities store for IE11. Refer to the “How to configure a browser to run in-browser player in MediaSense” section of the following page to add the certificate. http://docwiki.cisco.com/wiki/FAQs_for_Cisco_MediaSense#How_to_configure_a_browser_to_run_in-browser_player_in_MediaSense.3F

Viewing the Status of the Databases

The DB Cluster tab allows the administrator to view the current status of the REM databases. To view the database status, follow these steps:

Step 1 Click the **DB Cluster** tab.

Step 2 Look at the database status as indicated in the DB Cluster Nodes Column.

If status shown is green, then the Postgres Database is running properly. If the status shown is red, then the Postgres Database is not up and running. If that is the case, you should activate the database to get the database to run properly. Follow Steps 3-5 to activate the databases that are not up and running.

Step 3 Ensure that the Postgres process is running on the given REM node. See Appendix B for instructions on how to check if the Postgres Database process is running correctly.

Step 4 Choose the database that you want to activate by clicking the radio button next to its name.

Step 5 Click the **Activate** button.

Managing a LongPenTablet

The administrator can check the health of the LongPen Tablets and Writers and restart them by using the LongPen tab of the REAC.

To restart a tablet, follow these steps:

Step 1 Click the **LongPen** tab.

-
- Step 2** Choose the tablet.
- Step 3** Click the **Restart Tablet** button.
-

Managing Licenses

Each expert requires a license. You cannot add an expert if there is not an available license. An error message will appear on the Expert page if you try to add an expert without sufficient licenses.

The number of available licenses and the number of used licenses are indicated in the bottom half of the Licensing page.

You will need the following to add licenses to REAC:

- MAC address(es) of the REM server(s)
- The number of remote experts
- License file

Obtain the REM Server's MAC Address

To obtain the REM server's MAC address, you will need to use a terminal emulator such as PuTTY.

-
- Step 1** Open a terminal emulator such as PuTTY.
- Step 2** Enter the REM server's IP address for the host.
- Step 3** Enter **22** for the port number.
- Step 4** Choose **SSH** for the connection type.
- Step 5** Click **Open**.
- Step 6** When connected, type **installer** for the login and press the Enter key.
- Step 7** Type the password and press the Enter key.
- Step 8** In the Main Menu, type **a** to choose System Settings.
- Step 9** In the System Setting menu, type **d** to choose System Information.
- Step 10** Scroll up and find the HWaddr (MAC) address.
- Step 11** Copy the address.
-

Generate a License File

After you purchase the licenses, you will need to generate a license file that will be uploaded into REAC.

-
- Step 1** Log into www.cisco.com with your customer or partner credentials.
- Step 2** Purchase Remote Expert Agent licenses.
- Step 3** Go to the Cisco Licensing site at <https://tools.cisco.com/SWIFT/LicensingUI/Home>.
- Step 4** On the Product License Registration home page, click the green **Continue to Product License Registration** button.
- Step 5** Click the **Start License Wizard** button.
-

-
- Step 6** Enter the PAK numbers in the field.
 - Step 7** Enter the MAC address of the REM without the colons (e.g. 00000C11BB22). If there are two REM servers, separate the two MAC address with a space (e.g. 00000C11BB22 00000C33DD44)
 - Step 8** Click the **Assign** button and then click **Next**.
 - Step 9** Enter your email address. This email address will receive the license file.
 - Step 10** Check the **I agree with the Terms of the License** check box.
 - Step 11** Click the **Get License** button.
A green checkmark indicates that the request was successful. You will then receive an email with the license file. The license file is required to add licenses to the REAC.
-

Upload the License File

After you have received the license file, you will upload it into the REAC.

-
- Step 1** Choose the **Licensing** tab.
 - Step 2** Click the **Upload License** button.
 - Step 3** In the Add License dialog box, click the **Browse** button.
 - Step 4** Find the license file and click **Open**.
 - Step 5** Click the **Upload** button.
-

Modify a License

If there is a problem with the license file, you can upload a replacement or updated file.

-
- Step 1** Choose a license file.
 - Step 2** Click the **Modify** button.
 - Step 3** In the Replace/Update License dialog box, click the **Browse** button.
 - Step 4** Find the license file and click **Open**.
 - Step 5** Click the **Replace** button.



Note The Modify License feature will only replace the content of an existing license file. The licensefile name cannot be changed once it is uploaded.

Delete a License

-
- Step 1** Choose the license to be deleted.
 - Step 2** Click the **Delete** button.
A warning message appears.
-

Step 3 Click **Ok** to delete the license.

Configuring Session Result

The Session Result tab contains the session result questions and answers that are displayed on the customer pod after the call is disconnected from the expert. The Session Result Question tab displays the survey questions, their locales (i.e. English or Spanish), and the type of answers (e.g. multiple choice) possible.

All the IECs will show the same set of questions and answers.

Add a Question

There is no limit to the number of questions that can be added to the REM. To add a new question, follow these steps:

Step 1 Click the **Session Result** tab.

Step 2 Click **Add**.

The Add Question dialog box appears.

Step 3 From the Locale drop-down list, choose a locale.



Note Questions are associated with locales. If the customer has a choice of locales when initiating the call, questions for the locale that the customer chose will appear at the end of the call.

Step 4 Enter a question in the Question field.



Tip The question should be one that can be answered by short multiple choice answers.

Step 5 From the Question Type drop-down list, choose **Multiple Choice** or **Text**.



Note A virtual keyboard will automatically appear on the REIC screen for text-based questions.

Step 6 Click **Add**.

Modify a Question

To modify a question, follow these steps:

Step 1 Choose the question that you want to modify.

Step 2 Click the **Modify** button.

The Modify Question dialog box appears.

Step 3 Make the changes.

Step 4 Click **Update**.

Delete a Question

To delete a question, follow these steps:

-
- Step 1** Choose the question that you want to delete by clicking the radio button next to the question.
 - Step 2** Click the **Delete** button.
 - Step 3** When the warning dialog box appears, click **Ok** to delete the question.
-

Add Answers

For each multiple-choice question, you need to add at least two answers. Questions that require a “yes/no” or “true/false” answer are considered multiple-choice questions with two answers.

To add an answer to a multiple-choice question, follow these steps:

-
- Step 1** On the Questions page, choose the question to which you want to add answers.
 - Step 2** Click the **Add Answer** button.
The Add Answer dialog box appears.
 - Step 3** Enter an answer for the question in the Answer field.
 - Step 4** Click **Add**.
Repeat Steps 2-4 to create all the answers for that question.
-

Modify an Answer

To modify an answer, follow these steps:

-
- Step 1** Go to the **Session Result** tab to display the drop-down menu.
 - Step 2** Choose the **Answers** button under the Customer category.
The Answers screen appears.
 - Step 3** Choose the answer that you want to modify.
 - Step 4** Click **Modify**.
The Modify Answer dialog box appears.
 - Step 5** Edit the answer in the Answer field.
 - Step 6** Click **Update**.
-

Delete an Answer

To delete an answer, follow these steps:

-
- Step 1** In the **Session Result** drop-down menu, choose the **Answers** button under the Customer category.
The Answers screen appears.
 - Step 2** Choose the answer that you want to delete by clicking the radio button next to the answer.
 - Step 3** Click the **Delete** button.
 - Step 4** When the warning dialog box appears, click **Ok** to delete the answer.
-

Manage Agent Questions and Answers

You can create questions for the agent to answer during the session. The questions appear after you click "Session Result" in eREAD.

To access the agent questions and answers, follow these steps:

-
- Step 1** From the **Session Result** drop-down menu, choose the **Questionnaire** button under the Agent category.
The Questions screen for the agent appears.
 - Step 2** In this screen you can add, modify, or delete questions or add answers to a question. Follow the steps in the previous step sets to perform those actions.
 - Step 3** To modify or delete an answer, go to the Agent Answer screen by clicking the down arrow of the **Session Result** tab to display the drop-down menu and choosing the **Answers** button under the Agent category.
 - Step 4** Choose the answer that you want to modify or delete in the Answers screen.
 - Step 5** Follow the steps in the previous step sets to perform those actions.
-

Managing Users

The administrator can create Administrator and Guest users for REAC. A Guest user can view most of the tabs and the records within them but cannot add, modify, or delete records. Only users with the role of "Administrator" can add, modify, or delete records or playback MS recordings.

Add a New User

Follow these steps to add a new user:

-
- Step 1** Click the **Manage Users** tab.
 - Step 2** Click **Add**.
The Add User dialog box appears.
 - Step 3** Enter a user name in the Preferred Username field.
 - Step 4** Enter the user's real first and/or last name.
 - Step 5** Enter the user's email address.
 - Step 6** Choose **Administrator** or **Guest** from the Role drop-down list.
 - Step 7** Check the **Enable Account** check box.



Note If the Enable Account check box is not checked, the user will not be able to access the REAC.

Step 8 Enter a password for this user in the Password Text and Confirm Password fields.

Step 9 Click **Add**.



Note Remember, a user will be logged out of REAC if the session is idle for more than 45minutes.

Delete a User

Step 1 Click the **Manage Users** tab.

Step 2 Choose the user to be

deleted. **Step 3** Click the **Delete** button.

A warning message appears.

Step 4 Click **Ok** to delete the user.

Generating SessionReports

The Report Tool tab contains a tool for generating reports about the sessions including agent session and customer session results as well as session information with customer follow up.

To narrow down the search for specific session reports, the start and end dates for the sessions can be chosen.

Once the report has been generated, its criteria can be filtered including the start time, end time, kiosk number, queue name, queue number, expert, and locale.

Once the report is generated, it is emailed to the administrator. It can also be downloaded from the tool.

Step 1 Click the **Report Tool** tab.

Step 2 Click the **Run** button of the Report Generation Tool.

Step 3 In the Run Report Generation Tool dialog box, choose the type of report desired in the Report drop-down menu.

Step 4 Choose the start and end dates.

Step 5 Click the **Run Report** button to generate the report.

Step 6 The administrator will receive an email with the report(s). You can also download the reports by clicking the **Download Reports** button. Choose to **Open** or **Save File**. Click **OK**.

The zip file contains one or more spreadsheets.

Uploading Images to REAC

The Upload Image tool allows an administrator to upload user interface image files. Once uploaded, a URL is generated that can be used in REAC such as for Background images (see the “Background Image” section in Chapter 3) and Locale images (see the “Configuring a Locale” section in this chapter).

-
- Step 1** Click the **Upload Image** tab of the REAC.
 - Step 2** Click **Browse**.
 - Step 3** Find the image on your workstation and click **Open**. The name of the image appears in the field.
 - Step 4** Click **Upload**.
The file loads. When the file has successfully loaded to the REM server, a message box appears in the lower right corner of the REAC screen indicating that the file was saved.
 - Step 5** Click **Show the URL**. A dialog box opens containing the URL for the image.
 - Step 6** Press Ctrl + C and then the Enter key to copy the URL to your clipboard. Alternatively, right-click the URL and choose copy.
 - Step 7** Go the tab in REAC where you need the URL and paste it in the URL field. (Refer to the “Configuring a Locale” section in this chapter or the “Background Image” section in Chapter 3 for an example of using the URL generated.)
-

Cleaning the Call Cache

The administrator can clean the call cache of the kiosks if a session hangs. When a session hangs, a new call cannot be initiated to or from the customer pod. By cleaning the call cache, the session’s status in the Session tab is changed to “Completed”, which then allows the customer pod to start or receive a new call.

-
- Step 1** Click the **Clean Call Cache** tab.
A Status box appears in the lower right corner of the screen indicating that the call cache was cleaned.
-

Setting Document Camera Preset Zoom Buttons for Agents

There are four predefined zoom buttons in the document camera application that can be preset by the administrator. This is helpful for standard documents that agents are expected to take snapshots. For example, agents may routinely take snapshots of documents that are 8 1/2 x 11 inches as well as driver’s licenses. By presetting buttons so that the camera zooms into the document with the touch of a button can save the agent time manually zooming the camera in and out.

To preset the zoom buttons, follow these steps:

-
- Step 1** Click **Document Camera** tab.
 - Step 2** Choose a radio button.
 - Step 3** Click **Modify**. The Modify Preset Data dialog box will open.
 - Step 4** In the Preset Label field, enter a name for the button that will appear on the agent’s document camera application. For example, if you are configuring the button for documents the size of drivers’ licenses, enter “Driver’s License”.
 - Step 5** Now you will need to configure the RS232 Command, which is the zoom level.
 - a. Open the document camera application on your desktop.
-

- b. Place a document with the desired size beneath the document camera.
- c. Use the zoom buttons on the document camera application to zoom into the document so that its text can be easily read.
- d. Click one of the Preset buttons.
- e. Go to the IEM and choose the IEC that you used for capturing the document.
- f. Go to the Events tab of that IEC and find the event where you clicked the Preset button. You will need the value of the Camera Zoom position, for example, "905002020B08FF".
- g. Save the events as a text file by entering **10000** in the Max number of events field and clicking **Save As**.
- h. Open the file with Notepad.
- i. Scroll to the event.



Tip If you cannot find the event, repeat steps d-f.

- j. Copy the value for the Camera Zoom position (e.g. 905002020B08FF).
- k. Go to REAC and paste the value of the Camera Zoom position into the RS232 Command field.

Step 6 In the Button Status drop-down menu, choose **Enabled** so that the button will be activated for the agents.

Step 7 Click **Update**.



Note If the document camera application is open on agents' desktops during the configuration of these buttons, the buttons will not appear until the application is stopped and restarted. Click **Stop Camera** and then **Start Camera**.



Tip If you have questions about the document camera predefined zoom fields, click the **Help** button in the Document Camera tab.

Downloading the Document Camera Application File

The Download Apps tab contains the file required to set up the Document Camera application on the agents' workstations. The administrator will need to download the file and then distribute it to the agents or the person who will install the application on the agents' workstations.

- Step 1** Rollover the **Download Apps** tab to view the drop-down menu.
- Step 2** Click **Snapshot Capture App**.
- Step 3** In the dialog box, choose the **Save** button to save the snapshotapp-dist.zip file to the desktop.

Downloading the Desktop Share Utility File

The Download Apps tab contains the file required to set up the Desktop Share application on the agents' workstations. The administrator will need to download the file and then distribute it to the agents or the person who will install the application on the agents' workstations. Follow the instructions below to download the file to your desktop:

-
- Step 1** Rollover the **Download Apps** tab to view the drop-down menu.
 - Step 2** Click **Desktop Share Utility**.
 - Step 3** In the dialog box, choose the **Save** button to save the rem-desktopshare-utility.zip file to the desktop.
-

Downloading the SNMP MIBs for NMS File

The Download Apps tab contains the file required for SNMP Health Check feature. Follow the instructions below to download the file:

-
- Step 1** Rollover the **Download Apps** tab to view the drop-down menu.
 - Step 2** Click **SNMP MIBs for NMS**.
 - Step 3** In the dialog box, choose the **Save** button to save the snmpMIBS.zip file to the desktop.
-

Downloading Logs

The Download Logs tab contains lists of logs that can be used for troubleshooting issues:

1. Admin Console: Contains the reac.log from this REAC
2. Agent Desktop: Contains the read.log from eREAD
3. Session Manager: Contains the resc.log from the RESC
4. RE Events: Capture RE events during a specified time
5. Tomcat: Contains the catalina log for the Tomcat service Follow the steps below to download a log.

-
- Step 1** Hover over the Download Logs tab to open the drop-down menu.
 - Step 2** Choose one of the modules from the list.
 - Step 3** If you chose the Admin Console, Agent Desktop, Session Manager, or Tomcat module, you will see a list of logs that you can download. Choose the log that you want to download and then click the **Download** button. Go to Step 5.
 - Step 4** If you chose the RE Events module:
 - a. Click the From field to open the calendar.
 - b. Choose the start date of the events that you want captured.
 - a. Click the To field to open the calendar.
 - b. Choose the end date of the events that you want captured.
-

- c. Click the **Submit** button.

Step 5 Open or save the log file.

User Interface Design Specification

Chapter Overview

This guide shows the user interface graphics specifications for the touchscreen on the customer pod. Topics in this chapter include:

- “Home Screen”
- “Call Connecting Screen”
- “Call Connected Screen”
- “Scan Screen”
- “Signature Screen”
- “Thank You Screen”
- “Session Result Screen”
- “Hold Screen”
- “Help Wait Screen”

Home Screen

The Home screen contains the following images:

- Background
- Expert Type Buttons
- Help Button
- Language Buttons

Background

The Background image is used for all the screens.

The background image has the following specifications:

- File Formats: JPG, PNG

Figure 2-1 **Background Image Diagram**

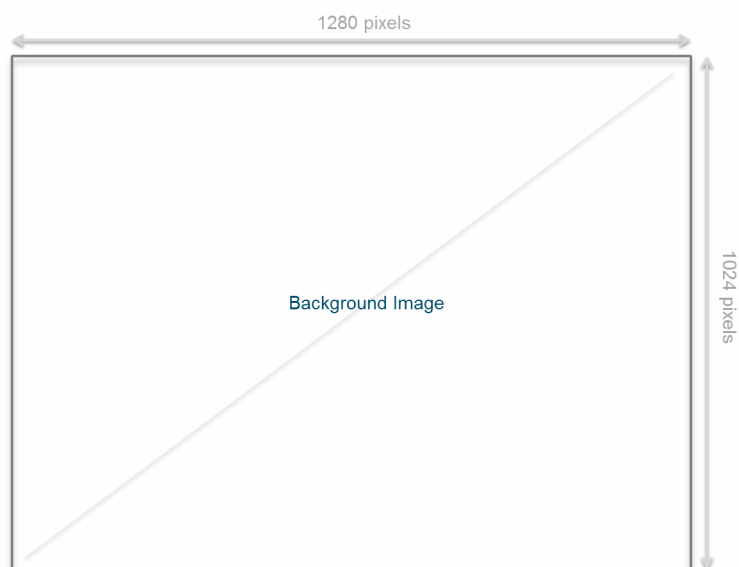


Figure 2-2 *Example of Background Image*



Expert Type Buttons

The Home screen can accommodate up to six expert type buttons. These buttons have the following specifications:

Figure 2-3 *Expert Type Button Dimensions and Examples*



Figure 2-4 *Example of Six Expert Type Buttons on the HomeScreen*



Help and Language Buttons

The Help button is placed in the lower left corner of the Home screen while the Language buttons (if more than one Locale is available) are placed in the lower right corner of the Home screen. Both buttons have the following specifications:

- File Formats: JPG, PNG

Figure 2-5 Home Screen Diagram showing Help and Language Button Locations

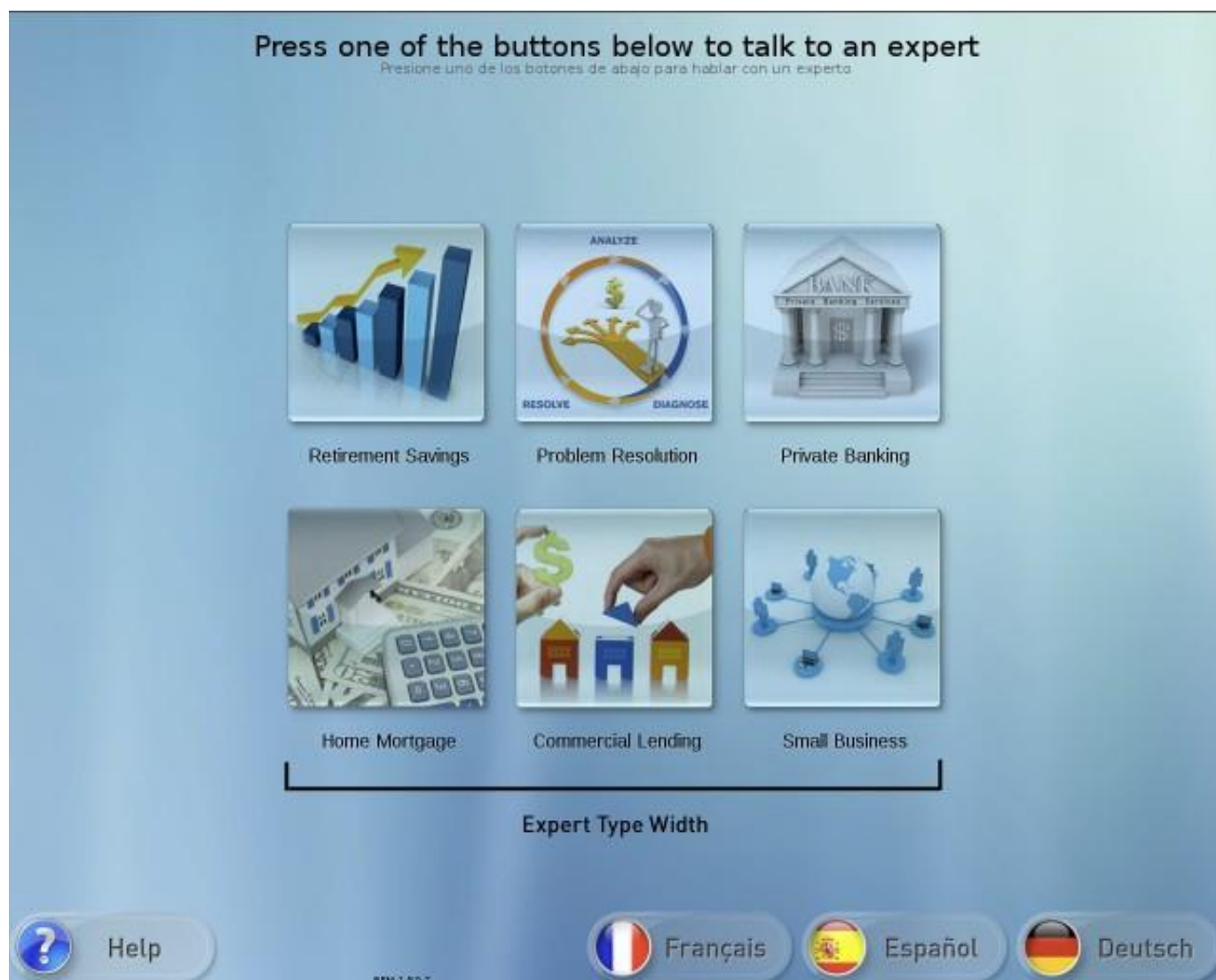


Figure 2-6 Example of a Home Screen showing Help and Language Buttons



Note The captions for the expert type images are configured through REAC while adding the expert type. Refer to the “Add an Expert Type” section of Chapter 1.

Call Connecting Screen

The Call Connecting screen contains the following:

- Cancel Button

- Small Logo
- Wait Video or Wait Image or Null

Cancel Button

- File Formats: JPG, PNG

Small Logo

The Small Logo appears in the upper left corner of the Call Connecting screen. It also appears on the Video Streaming, Hold, and Helpline screens.

- File Formats: JPG, PNG

Wait Video

A Wait Video can be played during the Call Connecting screen.

Figure 2-7 Call Connecting Screen Diagram with Wait Video Location

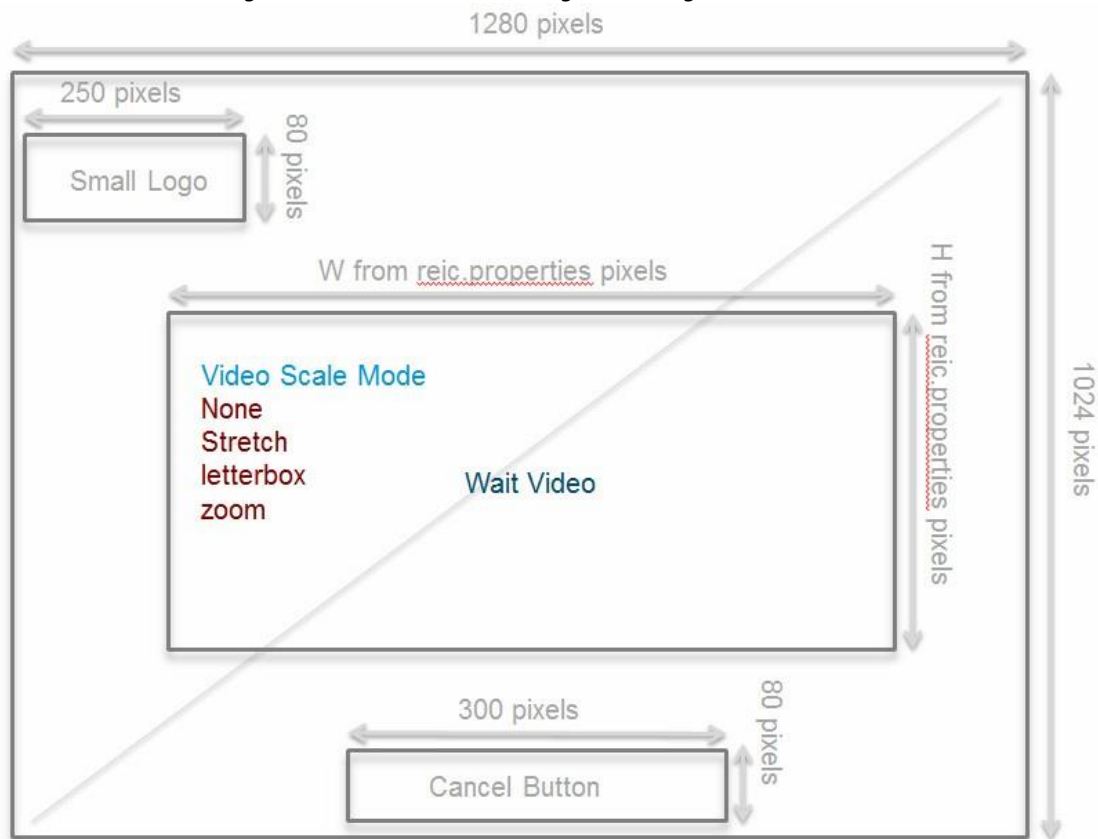
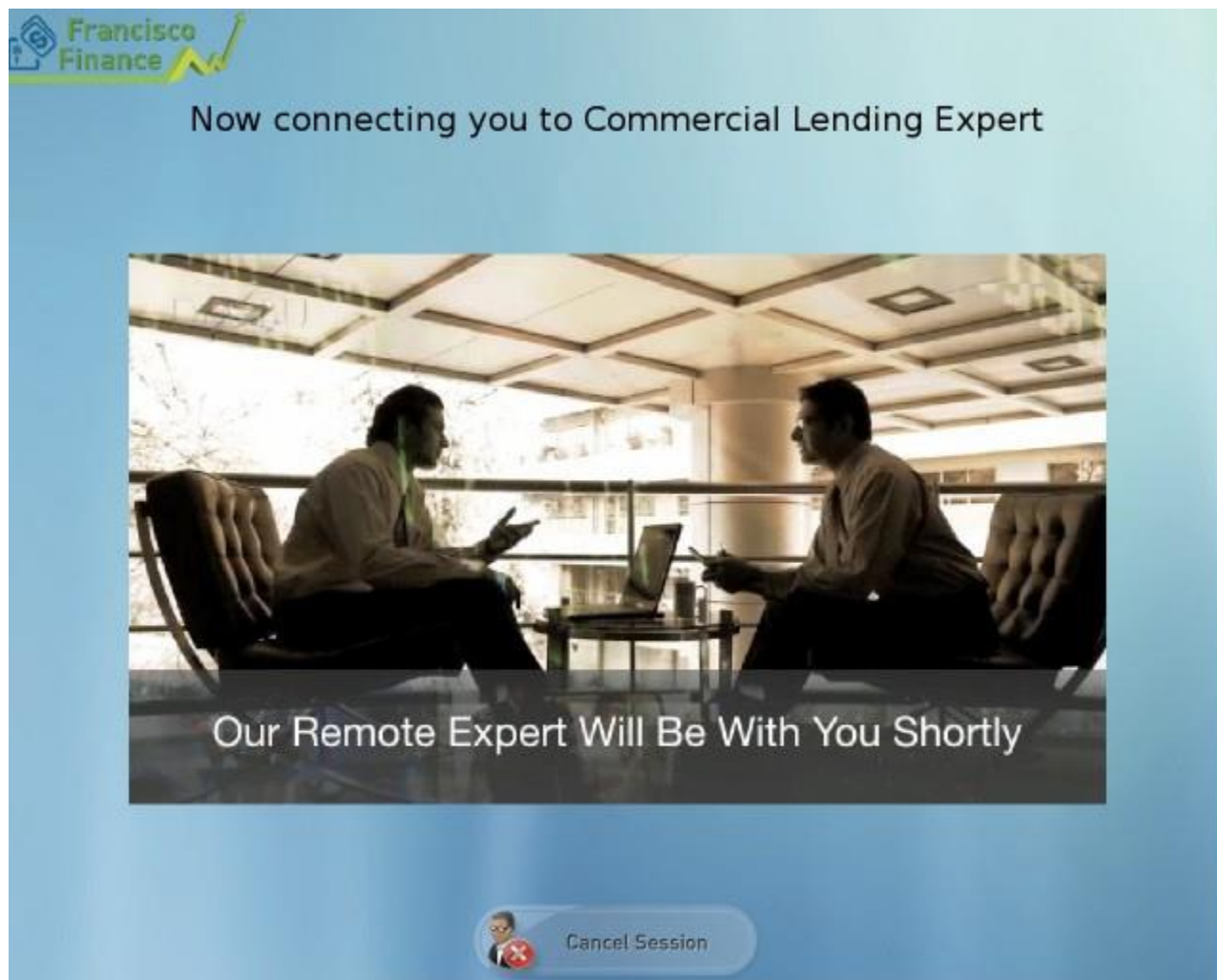


Figure 2-8 Example of a Call Connecting Screen showing a Wait Video



Wait Image

A Wait Image can be displayed during the Call Connecting screen instead of a Wait Video. File Format: JPG, PNG

Figure 2-9 *Call Connecting Screen Diagram with Wait Image Location*

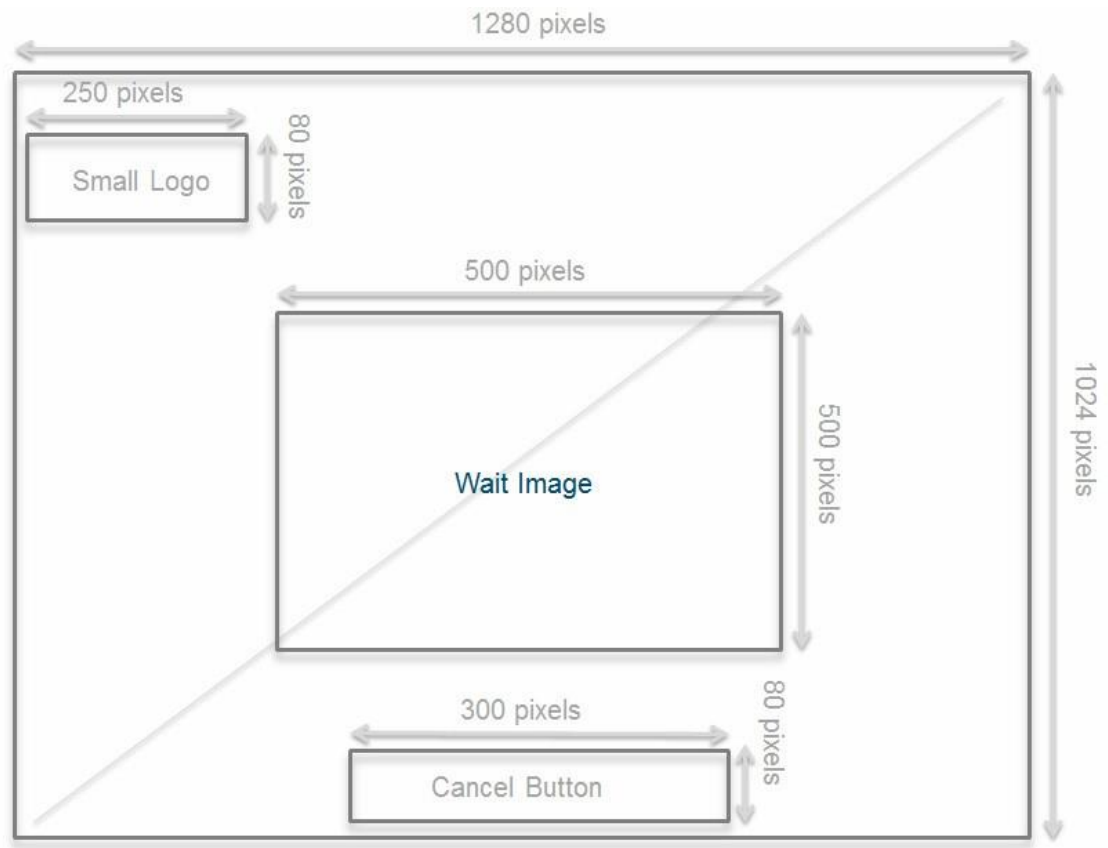
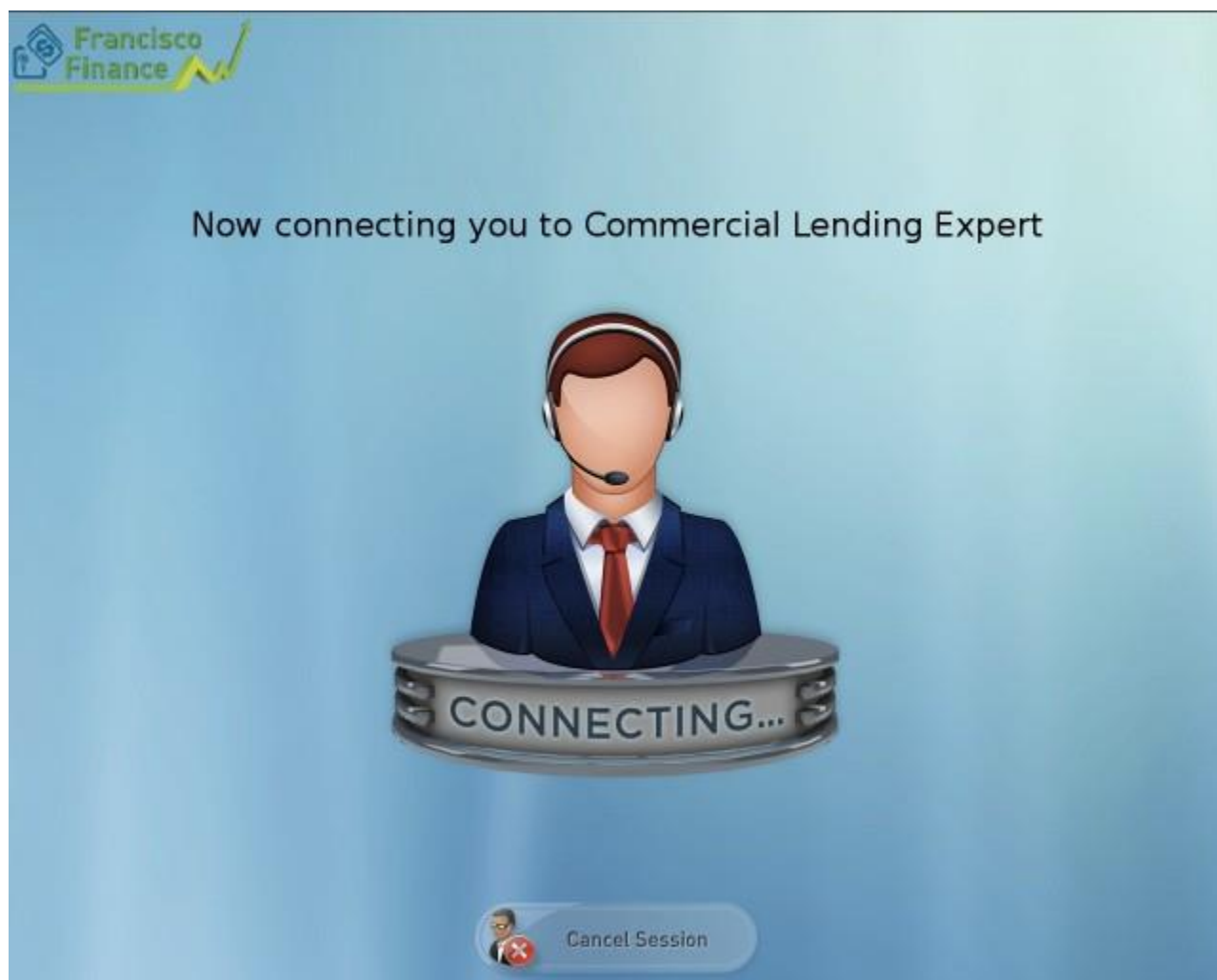


Figure 2-10 *Example of a Call Connecting Screen showing a WaitImage*



Null

If no Wait Image or Wait Video is desired, the center of the screen can be left blank.

Figure 2-11 *Call Connecting Screen Diagram without Wait Image or Wait Video*

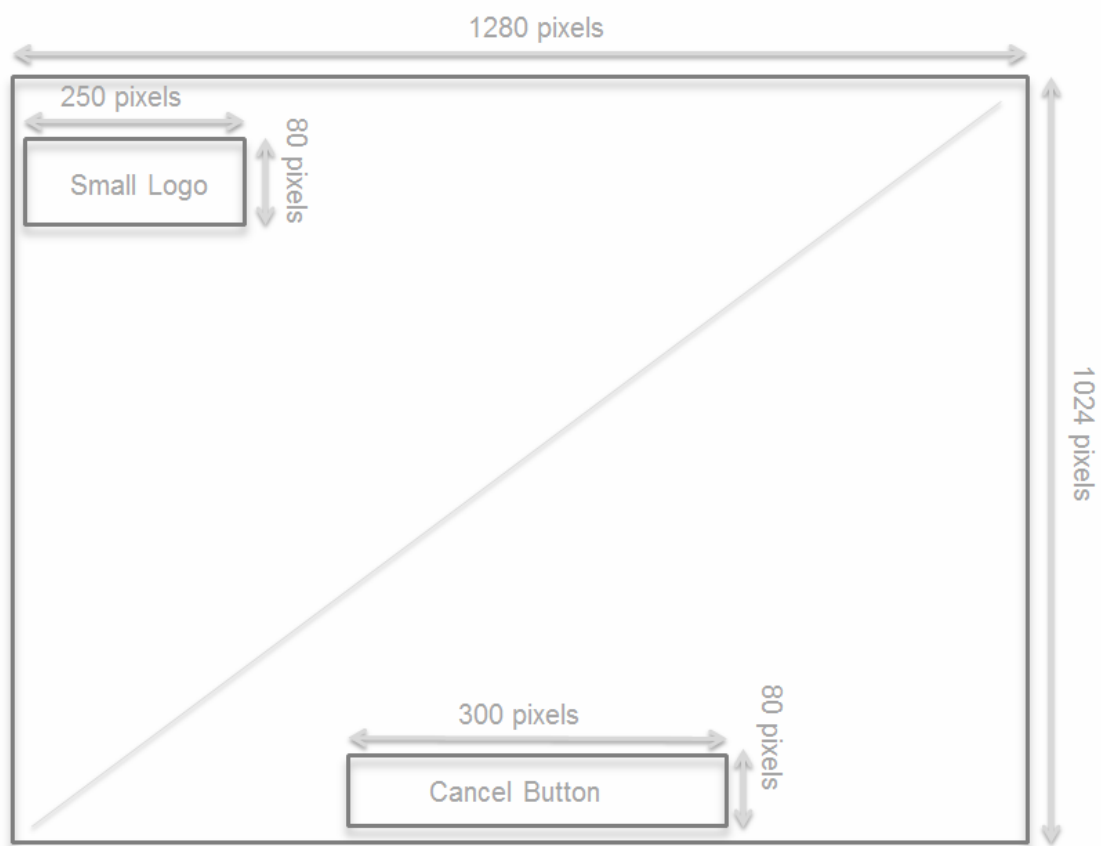
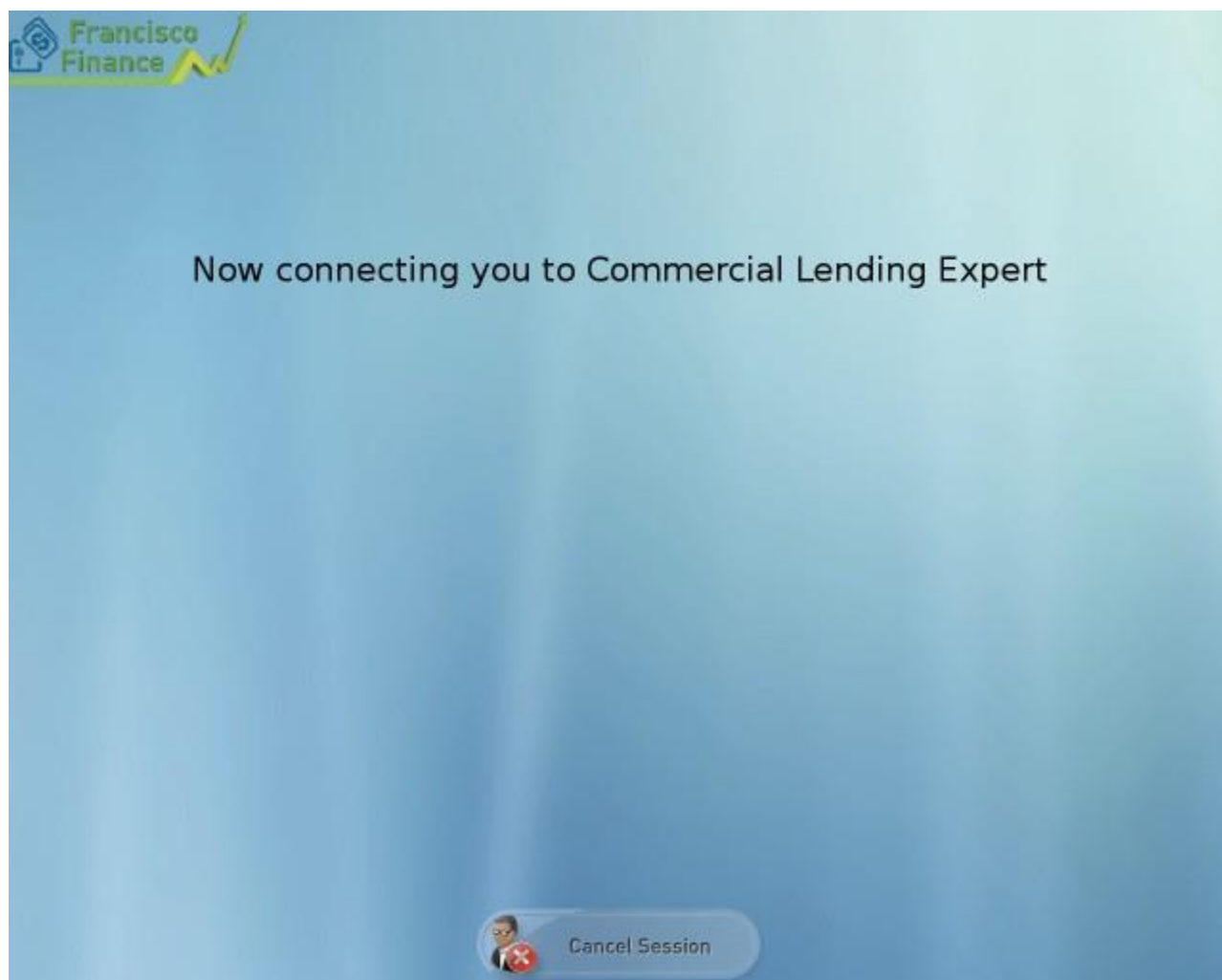


Figure 2-12 *Example of a Call Connecting Screen without a Wait Image or Wait Video*



Call Connected Screen

The Call Connected screen contains the Large Logo image.

Large Logo

The Large Logo has the following specifications:

- File Formats: JPG, PNG

Figure 2-13 **Call Connected Screen Diagram**

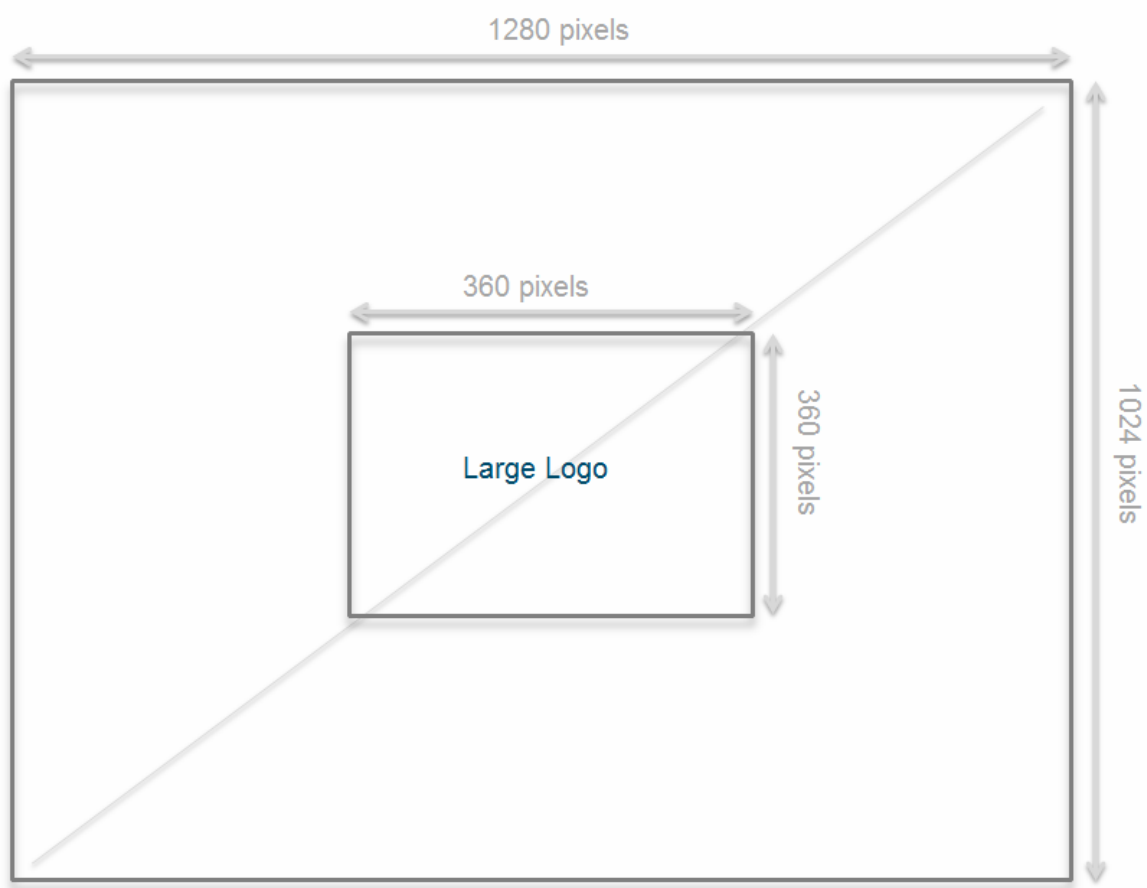
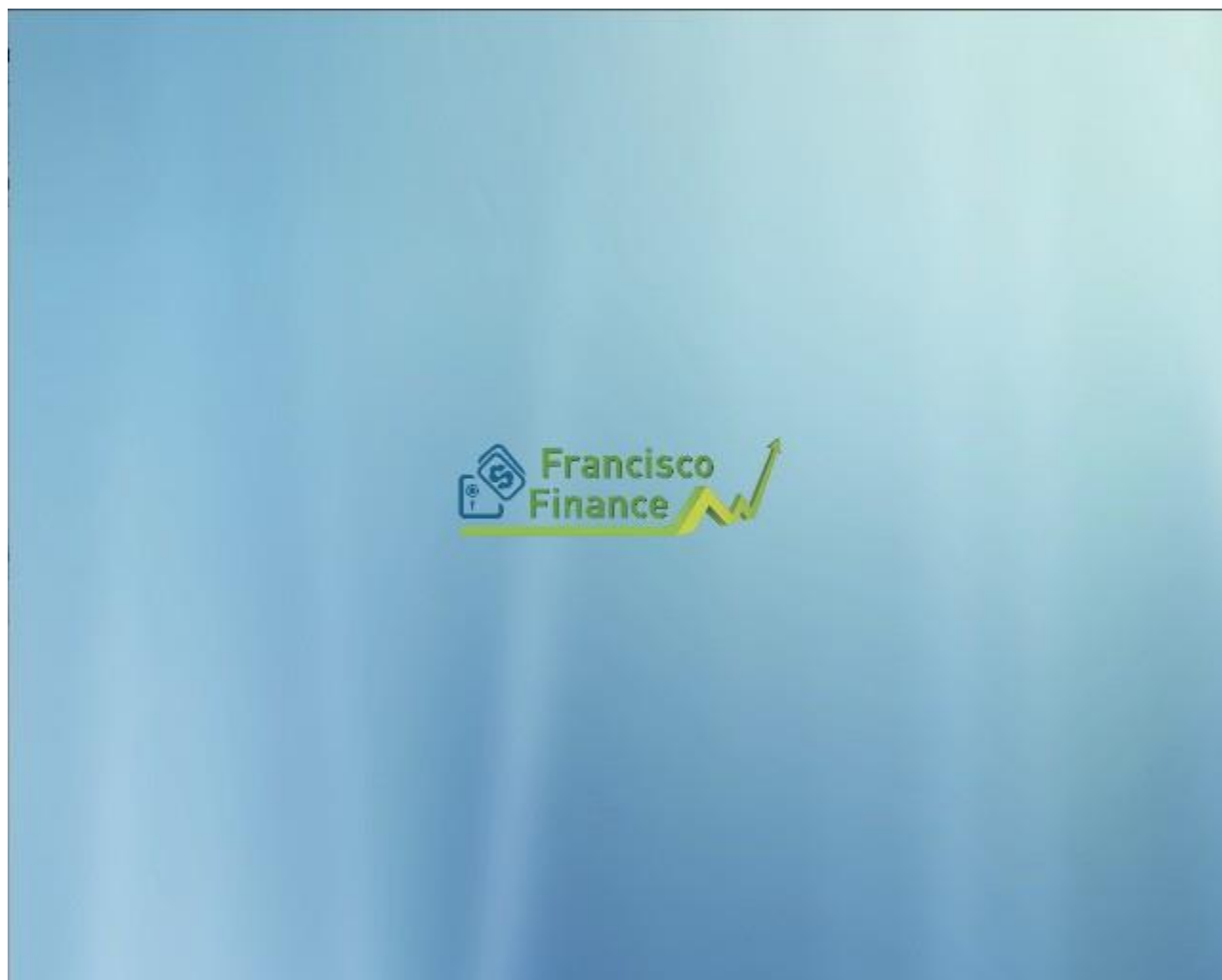


Figure 2-14 *Example of a Call Connected Screen*



Scan Screen

When the agent launches the Scan collaboration feature, the Scan screen appears on the customer pod. The buttons for the Scan screen can be customized.

File Format: JPG, PNG

Figure 2-15 *Scan ScreenDiagram*

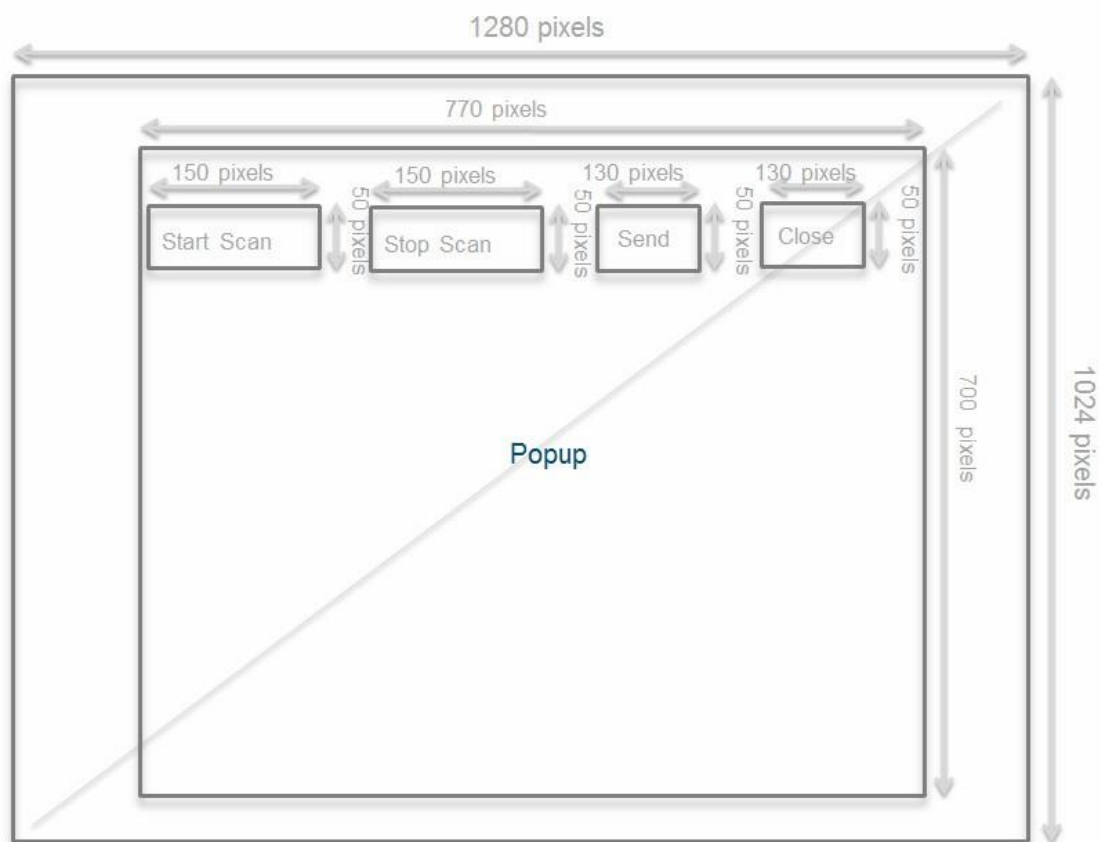
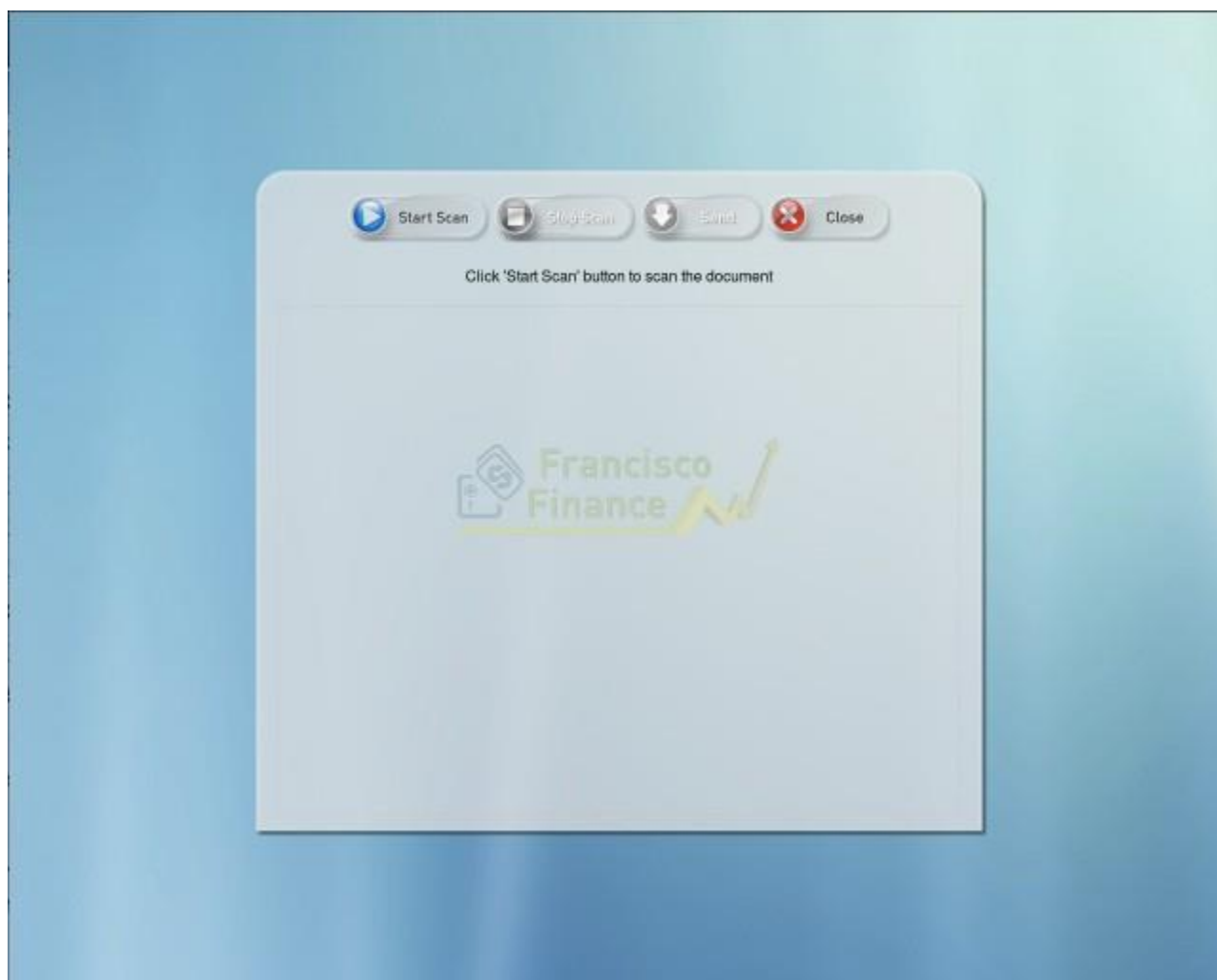


Figure 2-16 Example of a Scan Screen



Signature Screen

When the agent launches the Signature collaboration feature, the Signature screen appears on the customer pod. The buttons for the Signature screen can be customized.

File Format: JPG/PNG

Figure 2-17 **Signature Screen Diagram**

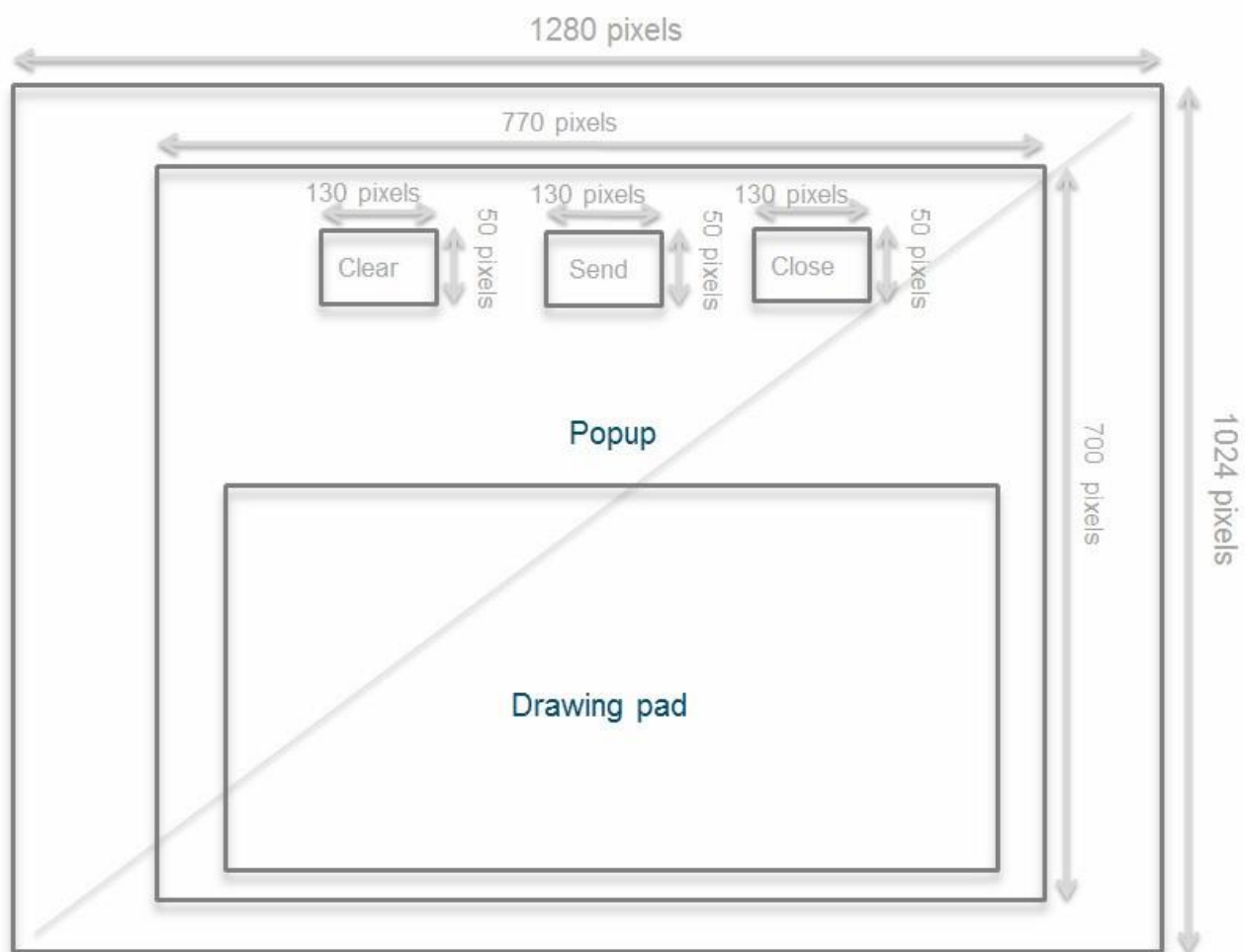


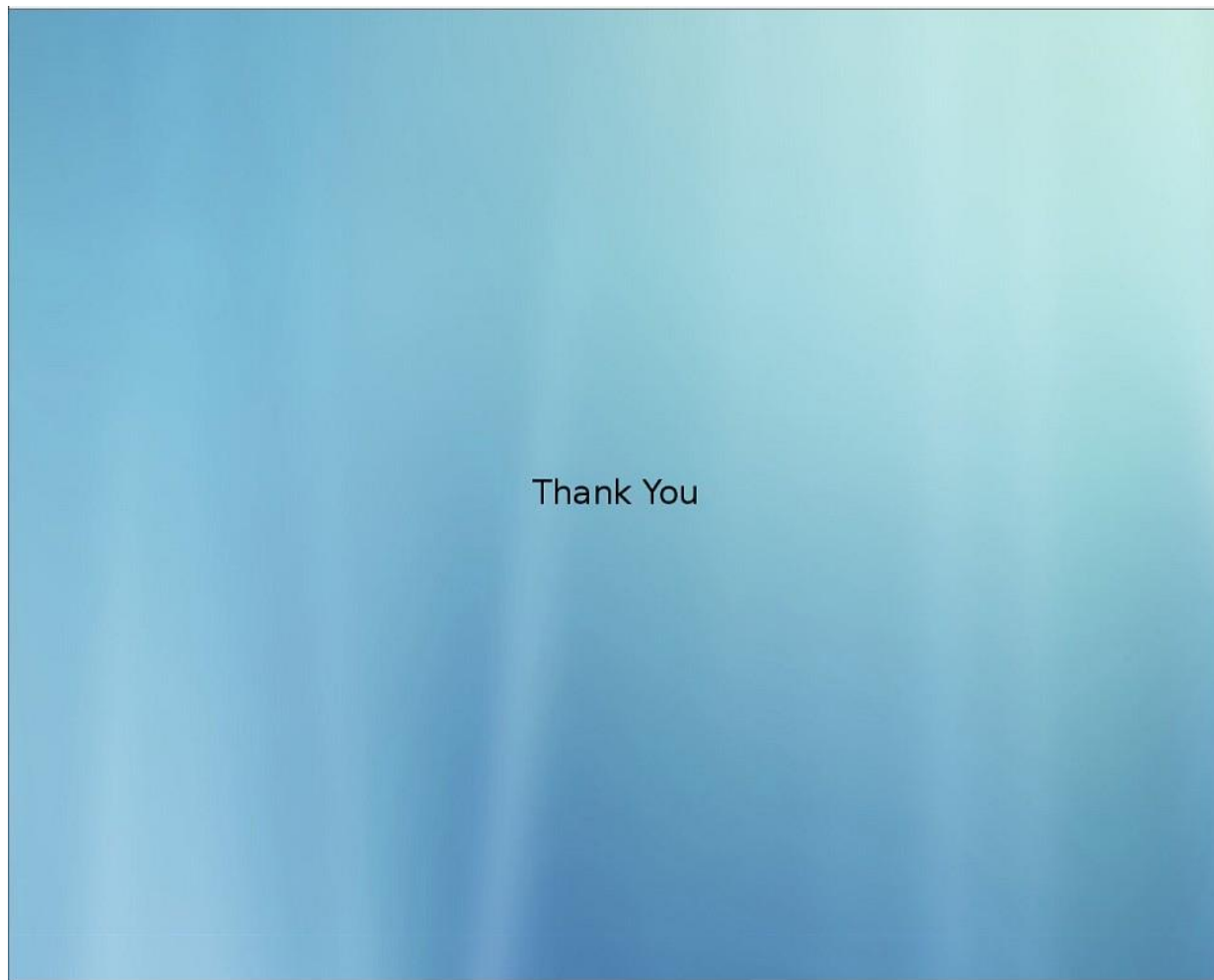
Figure 2-18 Example of a SignatureScreen



Thank You Screen

The Thank You screen contains “Thank You” text in the middle.

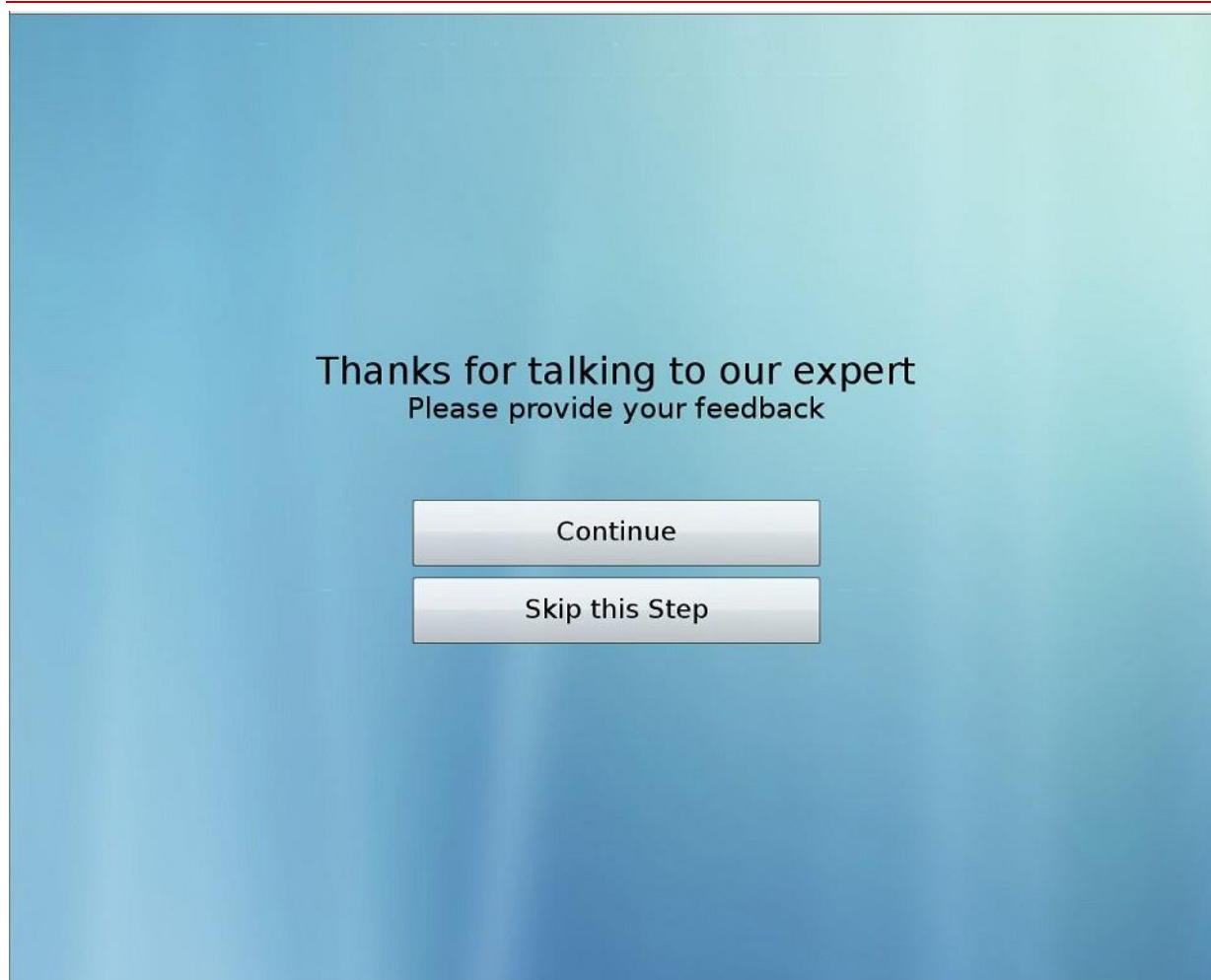
Figure 2-19 *Example of a Thank YouScreen*



Session Result Screen

The Session Result screen is similar to the Thank You screen in that it contains text in the middle.

Figure 2-20 *Example of a Session Result Screen*



Hold Screen

The Hold screen contains the Hold video and the Small Logo image.

Figure 2-21 **Hold Screen Diagram**

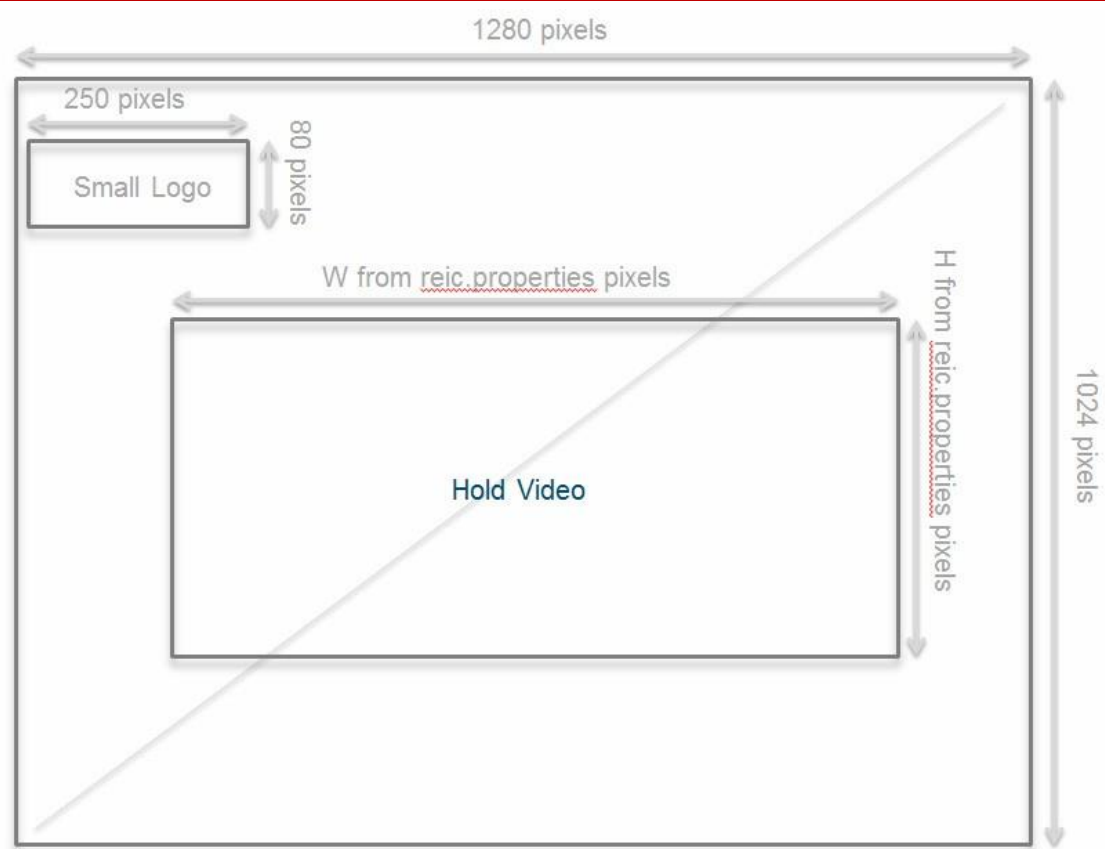
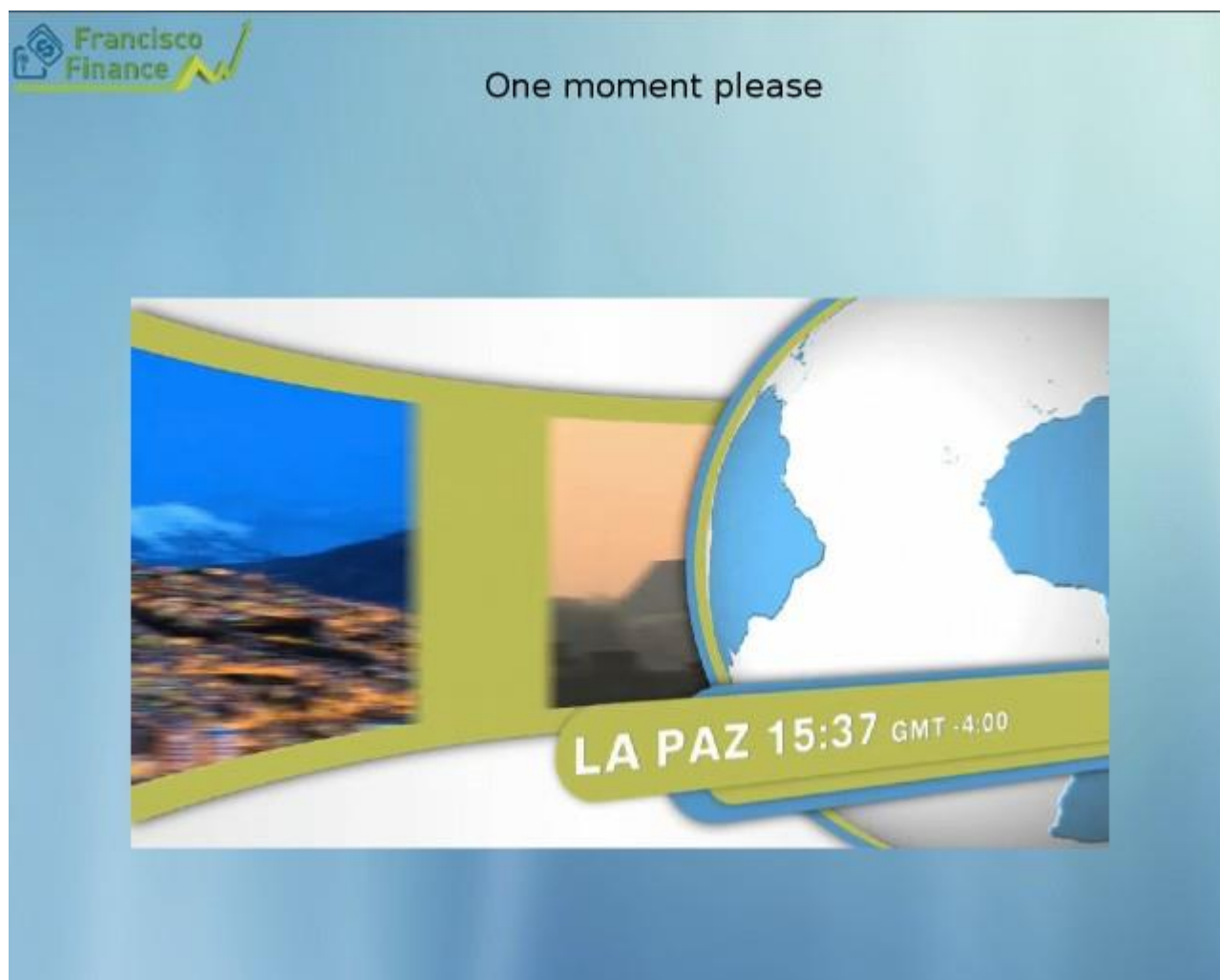


Figure 2-22 *Example of a Hold Screen Streaming the On Hold Video*



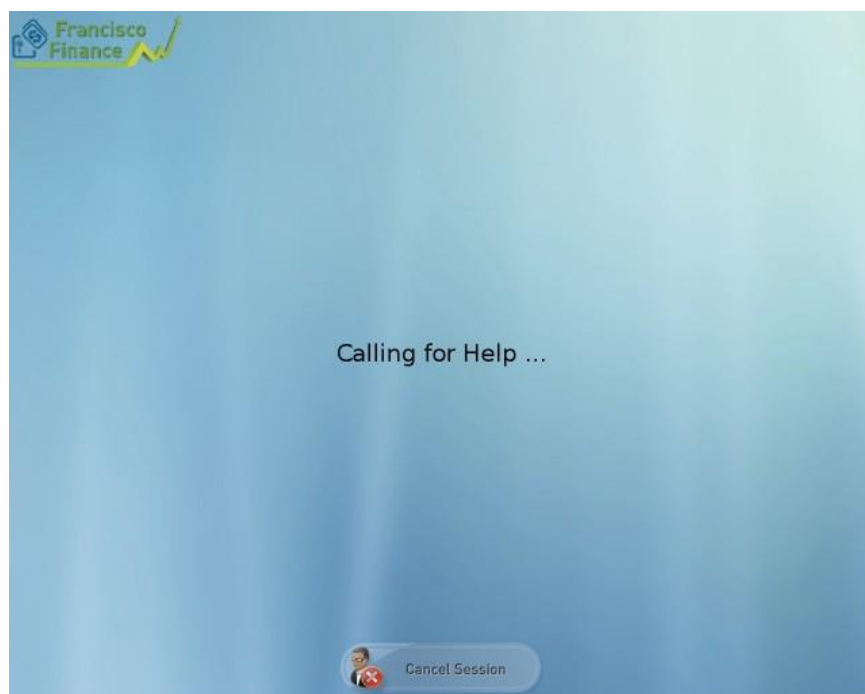
Help Wait Screen

The Help Wait screen contains the Small Logo image.

Figure 2-23 *Help Wait Screen Diagram*



Figure 2-24 Example of a Help Wait Screen



Remote Expert Interactive Collaboration (REIC) User Interface

Chapter Overview

The Moderro® Remote Expert Interactive Collaboration (REIC) is the pod screen that appears on the customer side of the Moderro Remote Expert (RE) solution.

This chapter is intended for administrators who will customize the appearance of the REIC user interface. It explains how to change the appearance of the REIC including images and text. This chapter also explains how an administrator will add locale and expert type images.

Topics in this chapter include:

- “REIC Overview”
- “REIC Properties”
- “Background Image”
- “Small Customer Logo Image”
- “Customer Header”
- “Big Customer Logo Image”
- “Expert Types”
- “Kiosk Not Registered Message”
- “Customizing Locales”
- “On Hold Video”
- “Session Result Screen”
- “REIC Modules”
- “Scanner Resolution Setting”
- “VNC Co-browsing Setting”

REIC Overview

The REIC is the customer pod screen that appears on the customer side of the RE solution. The customer initiates a call from the REIC screen.

The REIC is part of the REM installation ISO. The ISO contains the default Locales and Expert Types already configured in the database on successful installation of the ISO.

REIC Properties

After the REIC is installed using the ISO, the REIC can be configured to customize the screen that the customer views. The administrator can configure the big customer logo, the small customer logo or a header, the background image, the expert type width, the signature pad image, the signature background image, the scanner background image, or the screen module for customer identification. Use the Group tab in REAC to configure the user interface and upload image files.

Background Image

The background image will be displayed on all screens of the REIC.



Note The size of the background image must be at least 1280x1024 pixels. Otherwise, the image will not cover the customer pod screen completely. Refer to the *Moderro Remote Expert Manager Compatibility Guide* for the certified touch screens.

Small Customer Logo Image

The small customer logo will appear on the following screens:

- Wait screen
- On Hold screen
- Video streaming screen
- Help Wait screen
- Help Connected screen



Note The size of the small customer logo image should be 250x80 pixels before uploading. Otherwise, the image will not appear correctly on the customer pod screen.

Customer Header

You can add a header that will appear at the top of the touchscreen. The header can be up to 90 pixels high.



Note If you want to use a header, the small customer logo should be masked in order for the header to display properly. To mask the small logo, create a blank PNG file and upload it into the Group tab of REAC (see Chapter 1).

Big Customer Logo Image

The big customer logo image will appear on the REIC screen when the call is connected with the remote expert or agent.



Note The size of the big customer logo image should be 360x360 pixels before uploading. Otherwise, the image will not appear correctly on the customer pod screen.

Expert Types

The Expert Type is the expert to which the call is made from REIC. These expert types are added in the Expert Type tab of the REAC.

The Expert Type tab includes the Queue Video column. A queue video must be selected for each expert type. This queue video is the video displayed on the REIC screen while the customer waits for the expert to appear

on the video endpoint.

Expert Type Images

When the customer selects an expert type icon, a call is made from the REIC to an agent that has been associated with that expert type in the REAC.

The REIC screen displays at least one expert type icon. If the enterprise has different types of experts, customers can select the expert type icon on the REIC that best matches their need. In REM 11.0, the size and number of expert type icons can be customized on the REIC screen. For example, a bank could have six expert type icons: Commercial Lending, Home Mortgage, Private Banking, Problem Resolution, Retirement Savings, and Small Business.



Note

The captions for the expert type images are configured through REAC while adding the expert type. Refer to the “Add an Expert Type” section of Chapter 1.

In addition to the Expert Type icons, the Help icon also appears on the REIC screen. The Help icon can also appear on the REIC screen if they are added in the Moderro REAC within the Expert Type tab.

Expert Type Icons Layout

In REM 11.0, the Expert Type Icons layout can be configured using Theme Parameters when adding a group in the REAC. The default group has all the properties configured to display 6 default expert type images (235 x 235 pixels) properly on a screen with 1280 x 1024 pixels.

The Theme Parameters allow you to change the orientation, column and row count, alignment, color and size of the expert type font, and the background image etc. to create a unique look and feel Home screen to the customer.



Note

Refer to the “Add a Group” section of Chapter 1.

The images will be displayed as their default image size so you will need to initially configure their image sizes so that all the images will be of equal sizes and they are displayed in a grid.



Note

Please contact the RE team for more details if you plan to use an expert type icon that has the size smaller than 50x50 pixels or larger than 500x500 pixels.

In the figure below, the customer pod screen resolution is 1366x768 pixels. The size of the expert type icon is 500x500 pixels. The column and row count is 1. The expert type rollover color is 0x006600. The expert type font color is 0xffff66 and the font size is 35.

Figure 3-1 **Expert Type Layout Example 1**



In the figure below, the customer pod screen resolution is 1280x1024 pixels. The size of the expert type icon is 235x235 pixels. The column count is 3 and row count is 1. The horizontal gap is 100. The vertical align is bottom. The stage height is 0.

Figure 3-2 **Expert Type Layout Example 2**



In the figure below, the customer pod screen resolution is 1280x1024 pixels. The size of the expert type icon is 235x235 pixels. The column count is 4 and row count is 2.

Figure 3-3 *Expert Type Layout Example 3*



Kiosk Not Registered Message

When a customer pod is not registered in the database (i.e. it is not added in the Kiosk tab of the REAC), text will appear on the customer pod screen indicating that it is not registered. By default, the text reads “Kiosk is not registered”. That text can be modified by editing the text in the REIC properties file under TUI account: Main Menu > REM Server Administration > Edit REM Templates > e) REIC Properties:

```
kiosk.not.registered=<div style="text-align: center;"><p fontSize="45" fontWeight="bold">Kiosk is not registered</p></div>
```

Customizing Locales

This section explains how an administrator will customize locale text and images.

Locales

Locales are the languages that the customer pods support. Up to four locals can be made available to customers with one locale set as the default locale.

The Locale specific text is shown in the message bundle property file when the administrator adds a particular locale in the Locale tab of the REAC.

Images

The image for a locale, such as for Spanish, that displays on the REIC is added to the REAC.

The image can be uploaded to a new or existing Locale using the **Add** or **Modify** button in the Locale tab. Click the **Browse** button to find and upload the image.

The image file name then appears in the Image column of the Locale tab.

Locale Properties File (Message Bundle)

The Locale Properties form provides the text and images that will display on the REIC.

As explained in Chapter 1, the Google Translate API provides a translation of the default English customer pod screen text to dozens of languages. In order for the translation to occur using the Google Translate API, the REM server must have access to the Internet.

The table below provides details for each property as it appears in the English Locale. The Locale Properties text can be edited and the images replaced. Edit the text directly in the form. To replace images, first upload them into REAC using the Upload Image tool (see Chapter 1); then copy the last portion of the URL starting at `"/images/"` and replace the default file name with it.

Table 3-1 *EnglishLocaleProperties*

Property	Text that appears on the REIC	Video or Image File Name
app.title	Remote Expert	
screen.home.title	Press one of the buttons below to talk to an expert Presione uno de los botones de abajo para hablar con un experto	
screen.home.connecting	Please wait ..	
screen.call.ewt	Estimated Wait Time \${countDown}	
call.ewt.-1001	No agents are available in the new expert group, Please try after some time	
call.ewt.-2001	Experts are not ready to accept the call, please wait. Transferring the call to separate expert group	
call.ewt.-2002	Experts are busy with other calls, please wait	
call.ewt.-2003	No agents are available to accept the call, please wait. Transferring the call to separate expert group	
call.ewt.-2004	No agents are available to accept the call, please wait. Transferring the call	

	to separate expert group	
screen.call.connecting	Now connecting you to <<EXPERT_TYPE>> Expert 	
screen.call.connecting.help	Calling for Help ...	
screen.call.connected		
screen.call.connected.help	Now connected To the Help Line	
screen.call.onhold	One moment please	
screen.call.waitvideo		assets/video/wait.m4v
screen.call.waitimage		/images/connecting_eng_296x296.png
cancel.icon	Thanks for talking to our expert	/images/cancel_english_300_80.png
screen.callend.thanks	Please provide your feedback 	
screen.callend.skip	Skip this Step	
screen.callend.continue	Continue	
screen.thankyou.thanks	Thank You	
no.agents	Agents are not available currently. Please try after some time	
no.tp	Expert not Available	
server.down	Server is down	
screen.reschedule.message	Agent not answering. rescheduling	
screen.schduler.meeting.pending	Welcome\${customerName} Your Live Chat will start in few minutes	
screen.schduler.meeting.starting	Welcome\${customerName} Your Live Chat will start in few minutes	
screen.schduler.busy.agent	Welcome\${customerName} Agent is Busy Please hold on	
screen.schduler.meeting.reschedule	Welcome\${customerName} Agent is Busy Please hold on At Any point of time, If you want to reschedule the session, Please click the button below	
minute	minute	
minutes	minutes	

error.message.Decoding Error	Expert is not available	
error.message.207	Sorry, there is already an active call to an Expert. Please try again after the current call ends	
error.message.206	Kiosk phone is out of service	
error.message.202	System is not available, please try after some time	
error.message.201	Expert type is not configured, please try after some time	
error.message.208	Kiosk serial # is not configured, cannot start a call	
call.in.progress	Resuming the Session ...	
screen.customerid.title	Please enter the customer account number	
screen.customerid.submit	Submit	
screen.customerid.cancel	Cancel	
screen.customerid.error	This field is required	
screen.customerid.tooltip.error	This field is required	
screen.magstripe.title	Please Swipe the Card	
screen.magstripe.cancel	Cancel	
screen.error	Error	
screen.feedback.max.length	Feedback cannot exceed 250 characters	
screen.feedback.submit	Submit	
screen.feedback.next	Next	
scanner.sending.document	Sending scanned document	
scanner.not.supported	Scanner Not Supported	
scanner.not.found	Scanner Not Found	
scanner.detecting	Detecting Scanner	
scanner.scanning	Scanning Document	
scanner.completed	Scan Completed	
scanner.click.to.start	Click 'Start Scan' button to scan the document	
agent.scanner.sending.document	Sending Document to Agent	
agent.scanner.scanning	Now Agent is Scanning the	

	Document	
agent.scanner.complete d	Scan Completed, Please Wait for Agent to download and view the document	
agent.scanner.click.to.start	Please wait, Now the Agent controlling the scanner	
scanner.startbtn.mouseup		/images/start_english_150_50.png
scanner.startbtn.mouseover		/images/start_english_over_150_50.png
scanner.startbtn.mousedown		/images/start_english_down_150_50.png
scanner.startbtn.inactive		/images/start_english_inactive_150_50.png
scanner.stopbtn.mouseup		/images/stop_english_150_50.png
scanner.stopbtn.mouseover		/images/stop_english_over_150_50.png
scanner.stopbtn.mousedown		/images/stop_english_down_150_50.png
scanner.stopbtn.inactive		/images/stop_english_inactive_150_50.png
scanner.sendbtn.mouseup		/images/send_english_130_50.png
scanner.sendbtn.mouseover		/images/send_english_over_130_50.png
scanner.sendbtn.mousedown		/images/send_english_down_130_50.png
scanner.sendbtn.inactive		/images/send_english_inactive_130_50.png
scanner.closebtn.mouseup		/images/close_english_130_50.png
scanner.closebtn.mouseover		/images/close_english_over_130_50.png
scanner.closebtn.mousedown		/images/close_english_down_130_50.png
scanner.closebtn.inactive		/images/close_english_inactive_130_50.png
scanner.warning.busy	Busy	
scanner.operation.cancelled	Operation - Terminated	
signature.clearbtn.mouseup		/images/clear_english_130_50.png
signature.clearbtn.mouseover		/images/clear_english_over_130_50.png
signature.clearbtn.mousedown		/images/clear_english_down_130_50.png
signature.clearbtn.inactive		/images/clear_english_inactive_130_50.png
signature.sendbtn.mouseup		/images/send_english_130_50.png

signature.sendbtn.mouseover		/images/send_english_over_130_50.png
signature.sendbtn.mousedown		/images/send_english_down_130_50.png
signature.sendbtn.inactive		/images/send_english_inactive_130_50.png
signature.closebtn.mouseup		/images/close_english_130_50.png
signature.closebtn.mouseover		/images/close_english_over_130_50.png
signature.closebtn.mousedown		/images/close_english_down_130_50.png
signature.closebtn.inactive		/images/close_english_inactive_130_50.png
signature.instruction	 Please sign. Once done click on 'Send' button	
signature.closing.document	 Closing Signature Pad	
signature.sending.document	 Sending your Signature	

OnHoldVideo

The On Hold video appears on the REIC screen when an expert uses Finesse to put an ongoing call on hold. The On Hold video is configured in the REAC by adding the video in the Video tab and setting it as the On Hold video.

In order to display video when the On Hold page is displayed on the kiosk, the call.onhold.view property in the REIC Properties file must be set to "REM". Follow these steps to update the call.onhold.view property:

-
- Step 1** Log into the REM server under the TUI account.
 - Step 2** In the Main Menu, choose **d) REM Server Administration**.
 - Step 3** In the REM Server Administration menu, choose **c) Edit REM Templates**.
 - Step 4** In the Edit REM Templates menu, choose **e) REIC Properties**.
 - Step 5** Find **call.onhold.view=text** and replace "text" with "REM".
 - Step 6** Save the file.
 - Step 7** Choose **d) Run Configuration Tool** in the REM Server Administration menu.
-

Session Result Screen

The Session Result screen appears when a Remote Expert session is over. If the user clicks the Continue button, the next screen shows the first question.

When the customer has finished the survey, the Thank You screen appears.

REIC Modules

Keyboard Module

The Keyboard module can be configured to allow an end user to enter their numeric customer account ID number for further processing in the eREAD. This popup appears immediately after the end user presses any one of the call buttons from the REIC screen. This popup will timeout after a certain period of duration that is configured in the rem.properties file. The end user can touch the Submit button on the touchscreen or press the Enter button on the keyboard to submit their customer ID number and continue the call. Or the end user can touch the Cancel button on the touchscreen to continue the call without their customer ID.

Follow these steps to configure the keyboard module.

-
- Step 1** Configure the keyboard in REAC:
- Log into REAC and go to the **Group** tab.
 - Choose an existing group and click **Modify** or click **Add** to add a new group.
 - From the User Identification drop-down menu, choose **keyboard**.
 - Click **Create** or **Update** to save the configuration.
- Step 2** Connect USB keyboards to the IECs.
- Step 3** Reboot the IECs.
- Step 4** (Optional) If you want to change the text that appears on the customer pod when the keyboard is used, log into REAC and go to the **Locale** tab. Select a locale, click **Modify**, and then click **Add/Modify Message Bundle**. Replace the screen.customerid.title, screen.customerid.submit, screen.customerid.error, and screen.customerid.cancel fields with the desired text. Click **Update** in the window, and click **Update** in REAC.
-

Card Reader Module

The Card Reader module can be configured to allow an end user to swipe a magnetic card such as a bank card, credit card, loyalty card, badge, etc. at the customer pod. The information from the card is captured for further processing in the eREAD. A popup image appears on the touchscreen immediately after the end user presses any one of the call buttons. This popup informs the end user to swipe their card. The popup will timeout after a certain period of duration that is configured in the reic.properties file. The end user can touch the Cancel button on the touchscreen to skip swiping their card; the call will continue.

Follow these steps to configure the card reader module.

-
- Step 1** Configure the magstripe card reader in REAC:
- Log into REAC and go to the **Group** tab.
 - Choose an existing group and click **Modify** or click **Add** to add a new group.
 - From the User Identification drop-down menu, choose **magstripe**.
 - Click **Create** or **Update** to save the configuration.
- Step 2** If you want to change the text that appears on the customer pod for the card reader, log into REAC and go to the **Locale** tab. Select a locale, click **Modify**, and then click **Add/Modify Message Bundle**. Then replace the screen.magstripe.title and screen.magstripe.cancel lines with the desired text. Click **Update** in the window, and click **Update** in REAC.
- Step 3** In the IEM policy that is applied to the IEC, go to the application.data property.
-

Step 4 Add a key with the value **magstripe.scanner**.

Step 5 Add its value as **Mag-Tek USB Swipe Reader**.



Note If you are using the IEC 4650 model, use the value **0801:0001 MagTek Mini Swipe Reader (Keyboard Emulation)**.

Step 6 Click **Apply**.

Step 7 In the policy, go to **mouse > cursor > visible**.

Step 8 Change the value of the property to **Show mouse cursor**.

Step 9 Click **Apply**.

Step 10 Connect USB MAGTEK card readers to the IECs.

Step 11 Reboot the IECs.

Scanner Resolution Setting

The scanner resolution can be set in the REM Template.

Step 1 Go to the REM Templates file in the TUI (Main Menu > REM Server Administration > c) Edit REM Templates > e) REIC Properties).

Step 2 Find the Scanner Resolution Settings section.

Step 3 The default value of the scanner.resolution.dpiX and scanner.resoluion.dpiY properties is **300**, which is the maximum value. If you want to change the value of either or both properties, enter a new value(s) between 0 and 300.

Step 4 Save the file.

VNC Co-browsing Setting

The default setting of the VNCServer.readOnly property is 'false'. The default setting allows agents to assist customers by viewing the kiosk screen and then navigating the application, completing transactions, and even filling out forms.

If it is desired that the agent should only be able to view the kiosk screen, the administrator should change the setting to 'true'.

Step 1 Go to the REM Templates file in the TUI (Main Menu > REM Server Administration > c) Edit REM Templates > e) REIC Properties).

Step 2 Find the **VNC Server** section.

Step 3 Change the VNCServer.readOnly property to **true**.

Step 4 Save the file.

Step 5 Select **d) Run Configuration tool**. Follow the instructions.

Step 6 Reboot the kiosk in order for the new setting to work.

Remote Expert Agent Desktop Configuration

Chapter Overview

This chapter explains how to configure the agent's desktop.

Topics in this chapter include:

- "READ States"
- "DC Configuration in CAD"
- "Configure Finesse"

READ States

The remote expert's CAD can be configured to display different READ web pages. The following READ web pages and their URLs should be configured:

Table 4-1 *READ States*

HTTP Action / Action Name	Protocol	Host	Port	Path	Request Data Name	Request Data Value	Request Data Value Type
Answered	https	REM IP	8443	read/desktoppage	agentDn	LOCAL_PHONE_EXT	DataField
					calling	Calling#	DataField
Dropped	https	REM IP	8443	read/Common.jsp	agentDn	LOCAL_PHONE_EXT	DataField
					request	disconnect	UserDefined
Not Ready	https	REM IP	8443	read/Common.jsp	agentDn	LOCAL_PHONE_EXT	DataField
					request	welcome	UserDefined
					state	0	UserDefined
Ready	https	REM IP	8443	read/Common.jsp	agentDn	LOCAL_PHONE_EXT	DataField
					request	welcome	UserDefined
					state	1	UserDefined
Ringing	https	REM IP	8443	read/desktoppage	agentDn	LOCAL_PHONE_EXT	DataField
					calling	Calling#	DataField
Logout	https	REM IP	8443	read/Common.jsp	request	logout	UserDefined

Refer to the *Moderro Desktop Administrator User Guide* for instructions on how to configure the CAD voice contact work flows and CAD agent management work flows for the READ:

http://www.cisco.com/en/US/docs/voice_ip_comm/cust_contact/contact_center/crs/express_8_5/user/guide/cda85ccxug-cme.pdf



Note When configuring the CAD voice contact and agent management work flows in the Cisco Desktop Workflow Administrator, ensure that all five states have been configured with “https” as the protocol and “8443” as the port in the HTTP Action Setup dialog box.

DC Configuration in CAD

Follow the steps below to ensure DC is configured correctly in the agent’s CAD.

- Step 1** Open the Cisco Desktop Workflow Administrator.
- Step 2** Navigate to **Work Flow Configuration**.
- Step 3** Choose the appropriate work flow.
- Step 4** Click **CAD Agent** and then click **Voice Contact Work Flow**.
- Step 5** Under Events, choose the Answered and Dropped states.
- Step 6** Click Add to add an action item.
- Step 7** In the Select Action dialog box, click the **Launch External Application** tab.
- Step 8** Click **Add Action** and enter the action name as “DC Start”.
- Step 9** Enter the application’s directory and click **OK**.
- Step 10** Click **Add Action** and enter the action name as “DC Exit”.
- Step 11** Enter the application’s directory and click **OK**.



Note Application directory can be selected by browsing for the appropriate directory from the folder where DC is installed.

- Step 12** Click **Apply**.
- Step 13** Close the Cisco Desktop Workflow Administrator.

Configure Finesse

Now you need to make sure that the desktop layout used in Cisco Finesse is REM. You will change the IP address of the home page of the desktop layout from the Cisco Finesse server to the REM server.

- Step 1** Open your browser and enter **https://[Finesse_server’s_IP_address]:8443/cfadmin**. For example, **https://134.42.7.49:8443/cfadmin**.



Note If the customer is using the default setting for Cisco Finesse, Cisco Contact Center Enterprise (CCE) will use port 8443 while Cisco Contact Center Express (CCX) will use port 8445 (**https://[Finesse_server’s_IP_address]:8445/cfadmin**). Also, in the CCE setup, Finesse is a different VM. In CCX, on the other hand, Finesse is actually running on the CCX VM itself with a different port. However, those port numbers may be reconfigured to different ones, depending on customer’s requirements.

- Step 2** The Cisco Finesse Administration login screen will appear.

Step 3 Enter the ID and password of the administrator and click the **Sign In** button.

The Settings page of the Cisco Finesse Administration application is displayed.

Step 4 Click the **Desktop Layout** button in the menu bar.

Step 5 Find the line of XML code that contains “<gadget>http://”.

Step 6 Replace the URL of that line of code to the following:

<gadget>http://[REM_Server_IP_Address]:80/finesse/ERead.xml</gadget>



Note

If using Cisco Finesse 10.0(1), replace the URL with the following:

<gadget>http://[REM_Server_IP_Address]:80/finesse10/ERead.xml</gadget>



Note

If using Cisco Finesse 10.5(1), replace the URL with the following:

<gadget>http://[REM_Server_IP_Address]:80/finesse105/ERead.xml</gadget>

Step 7 Replace the IP address with that of the REM server.

Step 8 Click the **Save** button.

Configuring the Video URL

Appendix Overview

This appendix provides the video URLs that must be used depending on the video type.

Configuring the Video URL

Depending on the video type, the video URL must be configured accordingly.

Table A-1 **Video URLs**

Video Type	Video URL Format	Example
FLV	rtmp://<Media Server IP/Hostname>/vod/mp4:<Filename>.flv	rtmp://172.25.26.199/vod/mp4:cisco_network.flv
MP4	rtmp://<Media Server IP/Hostname>/vod/mp4:<Filename>.mp4	rtmp://172.25.26.199/vod/mp4:England_8Mbps.mp4
MOV	rtmp://<Media Server IP/Hostname>/vod/mp4:<Filename>.mov	rtmp://172.25.26.199/vod/mp4:Skyfall_train720p.mov
F4V	rtmp://<Media Server IP/Hostname>/vod/mp4:<Filename>.f4v	rtmp://172.25.26.199/vod/mp4:artbeats_2min.f4v

Checking the Postgres Database

Appendix Overview

This appendix explains how to check if the Postgres database is running. If it is not running, this appendix explains how to start the service.

Checking the Postgres Database

If one of the nodes shows as red in the DB Cluster tab, follow the below steps to make sure the Postgres process is running correctly:

-
- Step 1** Use a terminal emulator such as PuTTY to SSH into the REM server.
 - Step 2** In the Main menu, type **c** to access the Services Control menu. Press the Enter key.
 - Step 3** In the Services Control menu, type **c** to choose the Database Server menu. Press the Enter key.
 - Step 4** In the Database Server menu, type **a** to show database status. Press the Enter key. The ShowStatus screen shows that the process is running.



Note If the process is not running, then the Postgres DB is not working properly.

- Step 5** After you see the message that the command was completed successfully, press the Enter key.
 - Step 6** To restart the Postgres DB, press any key to return to the Database Server menu. Then in the Database Server menu, choose **b** and press the Enter key to start the service. The Start Service screen appears showing that the Postgres service was started.
 - Step 7** Press any key to return to the previous menu.
-

Frequently Asked Questions (FAQs)

Appendix Overview

This appendix provides answers to frequently asked questions.

Frequently Asked Questions (FAQs)

1. How are IVR Phone Numbers configured?
The IVR Phone Number is a UCCX/UCCE pilot number where the call is queued. Refer to a UCCX/UCCE configuration guide to configure a pilot number.
 2. What is a Locale?
The Locale is the language of the text that appears on the screen and the language spoken by the agents who answer calls after the customer presses an expert type button for that locale.
 3. Can a customer pod have more than one Locale?
Yes. In the REM 1.9.x release, a maximum of four locales are supported.
 4. Can different customer pods have different Locales?
Yes, you can set a specific Locale to a customer pod using the Modify Kiosk form.
 5. Why are Expert Types associated with Locales?
Expert Types are associated with Locales that represent the languages that they speak. When a call is made from a customer pod that displays content in the English language, the call is connected to an expert type associated with the English Locale.
 6. What happens if the TP IP address is incorrect in the Kiosk tab of the REAC?
The REM will be unable to setup call with UCCX/UCCE Pilot DN so it cannot proceed with the session.
 7. What happens if the DN of a customer pod TP codec is incorrect in the Kiosk tab of the REAC?
If the DN of the customer pod TP codec is incorrectly entered, then a call cannot be made to an expert and a RE session cannot be established.
 8. What happens if the IEC Server Host is incorrect in the Kiosk tab of the REAC?
If the IP address for the IEC is incorrect, then the IEC cannot be restarted from the REAC. Also, the aliveness check will not work (dual content will not work when there is no TP reboot).
 9. What are some of the errors that could be generated while rebooting the IEC and why do they occur?
Refer to the "Errors and Alerts from REAC" section of the *Moderro Remote Expert Manager Troubleshooting and Serviceability Guide*.
 10. What happens if the answers are not configured for a Session Result question?
If there are no answers configured, then the question is not displayed on the customer pod screen. The Thank You screen will be displayed when the session is disconnected.
 11. What happens if there are overlapping images for the day of the week and all days?
Preference is given to the image configured for a particular day and not to the all days content in case of overlapping timings. For example, you configured one content image ("A") to display from 8:00 to 16:00 on all days and another image ("B") to display from 10:00 to 14:00 on Mondays. On Mondays, the
-

“A” image will appear from 8:00 to 10:00. Then the “B” image will appear from 10:00 to 14:00. Finally, the “A” image will re-appear from 14:00 to 16:00. On all other days, the “A” image will appear from 8:00 to 16:00.

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