Moderro
Remote Expert Manager

eREAD - User Guide

Release 11

Moderro Technologies

www.moderro.com

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Overview

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Introduction

The Moderro® eRemote Expert Agent Desktop (eREAD) is an application for Cisco Unified Contact Center Enterprise (UCCE) and Cisco Unified Contact Center Express (UCCX) that enhance the collaborative experience between a customer in a branch office and an expert in a remote contact center office. eREAD is used for RE immersive sessions, which are initiated from kiosks.

The assumption in this document is that eREAD is deployed along with Cisco Unified Communications Manager (CUCM) and either UCCE or UCCX.

eREAD Overview

eREAD allows remote experts to share documents and stream media files to a REIC located at a branch office.
eREAD includes the ability for the remote expert to do the following:

- Add customer records
- Take private or public notes for future reference

- Reference previously saved notes
- Stream video to a REIC at a branch
- Stream a selected on-hold video to a REIC at a branch when the call is put on hold
- Preview selected videos
- View the status of the video being streamed
- Preview selected documents
- Preview documents from a local file system
- Print remotely at a branch printer connected to an IEC and view the status of the print job
- Share applications via a peer-to-peer connection
- Access LongPen tablets
- Provide session feedback
- Use a document camera
- Scan documents at the branch
- Capture signatures

Cisco Finesse and Internet Explorer

REM supports Internet Explorer(IE)11 when Cisco Finesse is used on an agent's workstation.

Note A proper CA certificate installed on the REM server is required for eREAD to populate in IE11.

Refer to the Cisco Finesse links below for information on supported browser versions and the steps for configuring IE browser settings to ensure all features of Cisco Finesse work properly.

- http://www.cisco.com/c/en/us/support/customer-collaboration/finesse-11-0-1/model.html
- http://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/prod ucts-release-notes-list.html

How to Use eREAD

eREAD is a web-based application that provides the agent the ability to make and accept calls, conference in or transfer calls to other agents, and use collaboration widgets. In this section, you will learn the following:
- log into eREAD
- make a call
- receive a call
- end a call
- place a call on hold
- conference in another agent
- transfer a call

Log into eREAD

Follow the steps below to log into eREAD.

Step 1 Open your web browser. If you are using Cisco Unified Contact Center Enterprise (UCCE), enter **https://[IP address]:8443/desktop** (for example, **https://35.4.27.134:8443/desktop**). If you are

using Cisco Unified Contact Center Express (UCCX), enter **https://[IP address]:8445/desktop** (for example, **https://135.4.27.134:8445/desktop**).

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Note If your organization is using the default setting for Cisco Finesse, UCCE will use port **8443**

while UCCX will use port 8445. Also, in the UCCE setup, Finesse is a different VM. In UCCX, on the other hand, Finesse is actually running on the UCCX VM itself with a different port.

However, those port numbers may be reconfigured to different ones, depending on your organization's requirements. Check with your administrator for the correct port number.

The Cisco Finesse login page appears.

Step 2 English is the default language. If you want to view the GUI in another supported language such as Simplified Chinese, use the language menu located on the right-hand side of the screen to choose a language.

Step 3 Enter your agent ID number.

Step 4 Enter your password.

Step 5 Enter your extension number.

Step 6 Click the **Sign In** button.

A secure connection message is displayed.

The next set of steps will enable the browser to trust the connection.

Step 7 Right click on the eREAD page and open it in a different tab by choosing **Open Frame in New Tab**.

Step 8 Go to the new tab and click **I Understand the Risks**.

Step 9 Click **Add Exception**. The Add Security Exception dialog will appear.

Step 10 Check the **Permanently store this exception** check box and click **Confirm Security Exception**. eREAD loads in the tab.

Step 11 Close the tab and go back to Finesse.

Step 12 Right click on the eREAD page and choose **Reload Frame**.

The eREAD application opens. You will see the message "Select READY to be available for a session. In addition, your agent ID and extension number are displayed in the upper left

corner of the application as well as the "Not Ready" state.

Make a New Call

If you want to make a call to another agent or a customer pod, follow these steps. This feature is used for scenarios such as when a customer has scheduled a call with you or you want to speak to another agent.

Step 1 Choose the **Not Ready** state in the upper left corner of the application.

Step 2   Click the **Make a New Call** button.

The phone book loads.

Step 3   Choose a contact from the List of Contacts or enter an extension number using the keypad.

Step 4   Click the green **Call** button within the keypad to place the call.

Step 5   If the agent or customer pod answers, the call state in the upper left corner will change to "Talking".

Note

If the agent of customer pod does not answer, you will see the message "Error Call could not be

completed". You can click the **Retry** button to place the call again or the **End** button to

return to the previous screen.

Receive a New Call

To receive calls, your eREAD state must be "Ready".

Step 1   Choose **Ready** from the state drop-down menu at the upper left of the screen.

The "Welcome to the Remote Expert Agent Desktop" message will appear in the eREAD area of the screen.

Step 2   When a call is placed to you, the screen will change and your state will change to "Reserved".

Step 3   Click the **Answer** button at the right side of the Call Variable bar.

The state changes to "Talking".

End a Call

When you want to end a call, follow these steps:

Step 1   To end a call, click the red **End** button.

Place a Call On Hold

Use the **Hold** button to place the call on hold. The On Hold video will be streamed to the customer pod until you click the **Retrieve** button to take the call off hold.

Conference with Another Agent

Follow these steps to conference in another agent during a call with a customer pod:

Step 1   While in a call, click the **Consult** button.

Step 2   Choose the agent in the List of Contacts or enter the agent's extension or the IVR of the expert type group directly into the keypad.

Step 3   Click the green **Call** button.

A new Call Variable bar for the agent that you are trying to conference in appears and displays the "Dialing" message.

Step 4   When the call has connected, go to the Call Variable bar for the customer pod and click the **Conference**
button.

Step 5   When you want to disconnect from the conference, click the red **Leave Conference** button.

Transfer Call to Another Agent

Follow these steps to transfer a call to another agent:

Step 1   While in a call, click the **Consult** button.

Step 2   Choose the agent in the List of Contacts or enter the agent's extension or the IVR of the expert type group directly into the keypad.

Step 3   Click the green **Call** button.

A new Call Variable bar for the agent that you are trying to transfer to appears and displays the "Dialing" message.

Step 4   When the call has connected, go to the Call Variable bar for the customer pod and click the **Transfer**
button.

You will be disconnected from the call.

Collaboration Widgets

When a remote expert answers the call, the eREAD web page will display in the browser window and each of the widgets in the web page is catered for different functions. There are three widgets in the eREAD web page: Customer, Document, and Video.

The eREAD web page that displays when the remote expert answers the call is actually a mash-up of different widgets that corresponds to different features. The widgets can be expanded or minimized to make it easier for the remote expert to work with those widgets.

The Customer widget is located on the left side of the page; it captures customer interactions. The Document widget appears to the right of the Customer widget and contains thumbnails of files for the customer. The Video widget appears below the Document widget and contains thumbnails of videos for the customer.

Customer Widget

The Customer widget allows the remote expert to add a new customer, view existing customer information, create notes, and view previously saved notes.

When a new customer is created, the first name, last name, and the gender is collected

to create a customer record that can be accessed when the same customer calls in the future.

If the customer is using a Keyboard or Card Reader module to initiate the call, the remote expert will receive a Card Number or Customer ID Number in the Customer widget when the call connects.

Add a New Customer Record

To add a new customer record, follow the steps below.

Step 1 Click the **Add** button to open the Add Customer dialog box.

Step 2 In the Add Customer dialog box, enter the customer's first name and last name in the First Name and Last Name fields.

Step 3 Choose a Gender radio button.

Step 4 Click **Submit**.

Choose Customer

Once a customer record has been added to the database, the record can be retrieved by selecting the customer's name from the Choose Customer drop down menu. When a customer's name is selected from the list, all the information about the customer including the notes can be viewed.

Alternatively, the customer can be retrieved from the Choose Customer drop down menu by typing in a partial or full name. All customers matching the name are displayed in the list. The agent can then select the appropriate customer from the list.

View Previous Notes

Notes keep track of important information related to interactions with customers. Notes created from previous sessions can help the remote expert remember key points of past discussions with the customer in the past. This will improve the relationship with the customer and make managing the relationship easier.

There are two types of notes: Public and Private. The notes created as type PUBLIC will be visible to the customer when they login to the enterprise portal. The notes created as type PRIVATE are visible only to the remote experts within the enterprise. All the content in the notes are visible. The remote expert does not need to double click the notes to read their contents.

Note Private notes are highlighted yellow so that remote experts can quickly differentiate them from public notes.

The remote expert can choose **Show Public**, **Show Private**, or **Show Both** from the drop down menu. Additionally, the remote expert can enter text into the Search field to find notes containing them.

Create a New Note

To create new notes, follow these steps:

Step 1	Click the **New Note** button.
Step 2	In the Add Note dialog box, enter text in the Notes field.
Step 3	Check the **Is Private** check box to mark the note as private.
Step 4	Click the **Submit** button to save the note.

Document Widget

The Document widget holds the most frequently printed customer documents and prints them at the REICs for customers. The types of files supported in the Document widget are PDF, TXT, and image (jpg, jpeg, bmp, gif, and jfif.jpe) files.

The Remote Expert Manager (REM) manages REIC information such as the REIC that the customer call originated from and the peripherals that are connected to that Interactive Experience Client (IEC). When the remote expert wants to print a document for the customer, the REM sends the document to the printer connected to the USB port on the IEC where the customer has originated the call.

The remote expert can upload additional PDF, text or image files from their workstation, preview them, and then print them to the customer.

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Note Documents that are uploaded and printed from the remote expert's workstation will not be available in the Document widget pane for future use. Documents must be uploaded into the Remote Expert Admin Console (REAC). Refer to the *Moderro Remote Expert Manager Administration Guide* for more information on how to upload documents.

The Documents widget has three panes: a pane that lists all the documents available, the document preview pane, and a pane that indicates the job status.

Document Pane

The left pane shows all the server side documents available to the remote expert. If there are many documents in the window, the remote expert can use the Filter to search for specific documents.

Preview Local File

Agent can click on the **Preview Local File** button to access files on the agent's workstation and then click the **Print** button to send the document to the printer at the kiosk.

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Note Make sure the file name of the document does not contain any special characters if printing the document from the agent's workstation.

Document Preview Pane

The pane in the middle is for previewing the document. When a document is selected, a preview of its content is displayed in this pane. Previewing a document helps the remote expert determine if that document contains the desired content for printing to the customer REIC.

To view the document's content, the remote expert can use the side and bottom scroll bars or the View All button at the upper right corner of the Document Preview pane.

When the remote expert has chosen a document to print to the branch printer, the remote expert clicks the **Print** button at the bottom left side of the Document Preview pane. The branch printer is connected to an USB port on the Interactive Experience Client (IEC). The IEC sends queue information to the REM, which then displays it in the Job Status pane.

Job Status Pane

The right pane on the Document Widget contains the printing status of documents.

Once the print job is executed by the remote expert, it is not possible to cancel the print job (other than calling someone at the branch to disconnect the printer). The print status information is only available during an active session; once the call has been disconnected, the status information is no longer visible.

The following printing states are possible:

• In Queue: This state is displayed when the document is waiting to be printed.

• Printing: This state is displayed when the document is being printed.

• SUCCESS: This state is displayed when the document has printed.

• Printer Not Found: This state is displayed when an error occurred during printing such as when the printer is not connected to the setup or the printer does not have toner/ink.

Video Widget

The Video widget is used to:

• Push a video file to a REIC

• Select a video that will be streamed while a call is on hold

As with documents, video files must first be uploaded using the REAC before they will display in the Video widget pane. For information on how to upload them to the server, refer to the *Moderro Remote Expert Manager Administration Guide*.

There are three panes in the Video widget: the Video pane, the Video Preview pane, and the Video Status pane.

Video Pane

The left pane of the Video widget shows all the video files that have been uploaded into the Video tab of the REAC.

Video files can be searched by entering a partial or full name into the Filter field located at the top of the pane. All videos that match the search text will be displayed.

To stream the video to a REIC, follow these steps:

Step 1 Select a video in the Video pane.

Step 2 Click the **Stream** button.

Step 3 If additional video files should be streamed, select another video and click the **Stream** button again.

This pane is also used to choose which video will be streamed to the REIC if the remote expert places the customer call on hold. In the REM, the administrator can select a default video to stream when any remote agent places a call on hold. In the Video pane, that video's name is highlighted yellow and the red Set Hold Video icon appears next to the name of the video.

The remote agent can choose a different video to stream based on the needs and interests of the customer. To choose a different video file to stream while the current customer is placed on hold, follow these steps:

Step 1 Select a video.

Step 2 Click the **Set Hold Video** button.

The thumbnail of the video file is highlighted yellow and the Set Hold Video icon

appears next to the video name to differentiate the file from the rest of the video files.

When the remote expert places the call on hold by clicking the **Hold** button, eREAD disables audio streaming and streams the video file to the REIC. The On Hold video is not placed in the queue of the Video Status pane.

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Note The document and video panes are disabled when the call is placed on hold. Only the customer notes pane is enabled. All three panes will be re-enabled when the expert takes the call off hold.

Video Preview Pane

The remote expert can preview a video in the Video Preview pane before streaming it to the REIC.

When the remote expert selects a video in the video list pane, the video appears in the preview pane. The preview window contains a video player to play and stop the video, maximize the player, and control the volume. To preview the video, the remote expert clicks on one of the play buttons (either the arrow in the video player toolbar below the video or the arrow that appears on top of the video).

Video Status Pane

After the **Stream** button is clicked, the video name and its streaming status appears in the Video Status pane. Unlike a print job, video streaming can be stopped by clicking the **Stop** button in the Action column.

If multiple videos were chosen for streaming, all the video names appear in the Video

Status pane in a queue. The queue indicates which video is currently being viewed by the customer at the REIC. After streaming the first video, the next video in the queue will be streamed. The status types are:

- To Be Viewed
- Viewing
- Viewed
- Paused
- Stopped

If the remote expert stops the first video stream, the second video will start streaming automatically. The remote expert can stop any video from streaming by clicking the **Stop** button beside it. Stopped videos show the status as "Stopped" in the Video Status pane.

If video is being streamed and a Direct Connect application share is initiated, the video which is currently being streamed is stopped and the status is streaming videos pane is shown as "Stopped".

Note The video will not stream for the remote expert. However, the remote expert can preview the same video file if necessary in the Video Preview pane.

Additional Collaboration Features

In addition to the various widgets mentioned above, eREAD has the following collaboration features:

- VNC Co-browsing
- Scan
- Signature Capture
- LongPen
- Session Result
- Desktop Share

Note The **Force Cancel** button that appears alongside the collaboration buttons can be used to cancel a collaboration job if it hangs despite attempts to exit the collaboration feature.

When the collaboration features have been engaged, no other collaboration features can be used except for the widgets. For example, if you have turned on the signature capture, you cannot scan a document but you can print a document. Similarly, if you have turned on the scanner, you cannot capture a signature or stream a video. All the additional collaboration buttons can be disabled in eREAD. Please refer to the *Moderro Remote Expert Administrator Guide* on how to turn the features off.

VNC Co-browsing

Co-browsing allows the agent to view the customer's screen so they can assist customers

by navigating the application, completing transactions, or filling out forms. With VNC co-browsing, the customer still has the ability to control the application if the customer desires.

Follow these steps to activate co-browsing:

Step 1   Click the **VNC Co-browsing** button on eREAD.

Step 2   In the pop up dialog box, click the **Start Remote Share** button.

Step 3   In the VNC Remote Sharing dialog box, click **OK**.

Step 4   Follow these steps to view the customer's application:

   a.   When the "Allow REM_IP to run "Java Platform SE 7 U"?" message appears on top of the web page, click the **Allow** button.

   b.   Click the **Allow and Remember** button.

   a.   When asked "Do you want to Continue?", click **Continue**.

   b.   When asked "Do you want to run this application?", check the **I accept the risk and want to run this application** check box and then click the **Run** button.

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Note   REM supports SSL certificates to eliminate the security pop-up windows when starting a VNC co-browsing session. Please contact your system administrator for more information.

The application on the customer's side appears in a window.

Step 5   Navigate the application along with the customer.

Step 6   When you have finished co-browsing, click the **End Remote Share** button.

Scan

The customer can place a document in the scanner in the customer pod and you can scan the document so you can see it on your desktop.

Follow these steps to scan a document at the customer pod:

Step 1   Ask the customer to place the document in the scanner.

Step 2   Click the **Scan** button on eREAD.

On the agent's side, the Scan Controller dialog box opens in eREAD.

On the customer pod, the customer sees a dialog box with a **Start Scan** button.

Step 3   Now you will take control of the customer pod screen. In the Scan Controller dialog box, click the **Take Control** button.

The **Scan** button is activated and the customer sees the "Please wait, Now the Agent controlling the scanner" message.

Step 4   Click the **Scan** button.

Step 5   Click **OK** in the Scan dialog box to accept that the command has been successfully sent to the customer pod.

The customer will see the "Now the Agent is Scanning the Document" message.

When the scan has completed, the "Scan Complete. Please Wait for Agent to download and view the document" message appears

Step 6 Click **OK** in the Scan pop up box when notified that the scan is complete.

The **Get Image** button is activated in the Scan Controller dialog box.

Step 7 Click the **Get Image** button.

Step 8 Click **OK** in the Scan dialog box to accept that the command has been successfully sent to the customer pod.

On the customer pod, the dialog box closes and the customer

sees the logo. The scanned document appears in the web

browser.

Step 9 Click **Open** or **Save** to view or save the document to your desktop.

Step 10 Click **Close** to exit Scan.

Note   You will need to close scan in order to use any of the other collaboration features.

Signature Capture

The customer's signature can be captured for contracts or verification. The customer will use their finger or stylus to sign the touchscreen depending on the capabilities of the touchscreen. An image of that signature is then sent to the agent.

Warning   **Moderro does not guarantee that any digital signatures captured using Remote Expert can be used for legal documents in all countries. Check with your local laws.**

Warning   **The signature captured should be safeguarded to protect the person who signed it. Check with your local laws as to safeguarding digital signatures. Moderro accepts no responsibility for the misuse of any signatures captured.**

Follow these steps to capture a signature at the customer pod:

Step 1 Click the **Signature Capture** button on eREAD.

The Signature Capture dialog box opens on the customer pod's touchscreen.

Step 2   Ask the customer to sign the touchscreen with his or her finger or a stylus if the touchscreen supports it.

Step 3 If the customer is satisfied with the signature, ask the customer to click the **Send** button. If the customer is not satisfied with the signature, ask the customer to click the **Clear** button and then sign the touchscreen again.

The customer's signature will be transmitted to the agent and will appear in eREAD. On

the customer pod, the dialog box will automatically close.

Step 4 Once you see the image of the signature, click **Download** and then **Save** to save the image of the signature to your desktop.

LongPen

When you click the LongPen icon in the status bar, the LongPen tablet status dialog box is displayed. If you want to lock the writer and tablet, follow these steps:

Step 1 Click the **LongPen** button.

After the LongPen widget opens, an **Unlocked** icon will appear under the Writers area. The status will be indicated as "Idle".

Step 2 Click the **Unlocked** icon to reserve the writer and tablet.

The writer status will change to "Wait …" and then become "Reserved". The Unlocked icon turns to a Locked icon. The tablet status shows it is "connected".

Step 3 Click the green **Start** icon at the bottom right of the dialog box to start the signing session. The message "Session has been started" will be displayed in a pop-up dialog box.

Step 4 Click OK to close the pop-up dialog box.

Step 5 Look at the tablet at the customer pod. Verify that it is showing the "Signing" screen.

Step 6 Test the tablet by signing your name on the tablet and clicking the **Send** button.

The writer will start signing automatically.

Step 7 After the writer has completed signing, click the red icon on the LongPen widget.

The "Session has been completed" message will be displayed in a pop-up dialog box.

Step 8 Click **OK** to close the pop-up dialog box.

The writer and tablet will go back to the Idle state. This complete the signing session.

Step 9 If the Unlocked icon does not show on the widget, click the **Refresh** icon at the bottom left of the dialog box to refresh the writer and tablet status.

Session Result

When you click the Session Result icon, the Submit Session Result dialog box is displayed. All the questions added as a part of REAC Session Result tab (Agent Questionnaire) are displayed here.

Note Questions can be either free text (where an agent can write descriptive responses) or multiple choice.

To configure Session questions which would appear on clicking Session Result button, follow these steps:

Step 1   Using a supported web browser, navigate to REAC at **https://<server_ip>:8443/reac**.

Step 2   Click the **Session Result** tab and choose **Agent** and then choose **Questionnaire**.

Step 3   Click the **Add** button to add a question.

Step 4   Choose the question type as either **Multiple Choice** or **Free Text**.

Step 5   Enter the question text.

Step 6   Save the question.

Step 7   In case of multiple choice questions, select the question and click **Add Answer.**

Step 8   Add answers and save them.

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Note   Any number of answers can be added to a question.

When you select the Session result button in eREAD, all the questions under the Agent feedback questionnaire will appear.

Desktop Share

Desktop Share is a feature that allows you to share your desktop screen with customers at the kiosk. This is particularly useful if you want the customer at the kiosk to use the kiosk keyboard to enter their username, password, or other information into a form that is on your desktop. When you click the **Desktop Share** button, your desktop screen will be displayed on the kiosk screen at the branch.

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Caution   The customer and anyone else at the kiosk can see everything on your desktop screen once you start Desktop Share. It is important that you do not accidentally share any confidential, sensitive, or personal information. Before starting Desktop Share, make sure that all programs closed on your desktop except for those that you want to share with the customer during that session.

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Tip If you have two desktop screens, you can share just the one showing content appropriate for the client. Refer to the *Moderro Remote Expert Manager Agent's Workstation Setup Guide* for instructions on how to select which screen to share in the RD Server on your desktop.

Peer-to-Peer Sharing (DirectConnect)

RE uses the Direct Connect application to enable bi-directional sharing between the customer and the remote expert.

Direct Connect will not automatically launch; the agent will need to manually launch it during the call.

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Tip   Agents should create a desktop shortcut for Direct Connect so that they can quickly launch it when they need it during a call.

The Direct Connect dialog box opens.

The remote expert must click the **Connect** button on the Direct Connect dialog box to start sharing. The REM then sets up a audio and video conferencing session between the customer REIC and the remote expert's workstation. Once the session has been established, the Client Status radio button turns green.

By default, nothing is being shared, which is indicated by the selection of the "None" radio button. All the active applications that are currently running on the remote expert's workstation will appear as radio buttons in the Sharing area of the Direct Connect dialog box. The remote expert clicks on the radio button of the desired application to share that application with the customer at the REIC.

When an application has been selected for sharing, the application's window will appear as the active window on the remote expert's workstation. The color of the application window turns green to indicate that it is active.

A snapshot of that application is also shown in the Remote View Mirror area of the Direct Connect dialog box to confirm that the REIC is actually showing that application.

Sharing the application does not automatically enable bi-directional peer-to-peer sharing. The remote expert must first check the **Allow Interaction** check box to enable bi-directional sharing between the customer and the remote expert. Since the REIC contains a touch screen, the customer can select any part of the shared screen with their finger.

When any of the other windows on the remote expert's workstation becomes the active window, the shared application window turns red. When it is turns red, peer-to-peer sharing is placed on hold. The customer will still be able to see the shared application on the REIC but will not be able to interact with the application as before.

The remote expert ends the sharing session by clicking the **Disconnect** button. The Client Status button turns red to indicate that there is no active sharing session between the customer REIC and the remote expert's workstation.

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Note Application sharing using Direct Connect takes precedence over video streaming. If video streaming had already started or the caller was placed on hold to stream video, when the Direct Connect application is shared the video streaming stops and the shared application is displayed on the REIC. When the customer is put on hold during application sharing, Direct Connect is disconnected and the on hold video is streamed to the REIC. If the agent wants to share an application after the call is resumed, the agent must repeat the steps to share an application.

Document Camera

A document camera can be mounted in the ceiling above the customer pod. This camera can be used to view live video of a document that the customer has brought to the RE session. A snapshot can then be taken of the document. Taking a snapshot of a document

is a faster method for the agent than scanning a document.

The agent can control the document camera in the following ways:

- Turn the document camera on or off
- Turn the laser pointer on and off
- Zoom the document camera in or out
- Select different presets corresponding to zoom positions
- Enter a prefix for the snapshots
- Take a snapshot
- View the snapshot
- Rename the snapshot file
- Copy the snapshot to your clipboard
- Delete snapshots

Note Snapshots are stored on the agent's workstation not a server.

The document camera application must already be installed on the agent's desktop and a shortcut to the application should be made available on the desktop for the agent to quickly launch the application.

If the agent wants to view a customer's document during a RE session and take a snapshot, follow these steps:

Step 1 Click the shortcut for the document camera on your desktop. The Document Camera application opens.

Step 2 Enter your directory number (extension) in the Directory

Number field. **Step 3** Click the **Start Camera** button to turn the

camera on the customer side. **Step 4** Ask the customer to place

the document under the document camera.

Step 5 When prompted to wait while the image is streamed, click **OK**.

Step 6 Once the image is visible in the upper window, you can use the laser pointer to pinpoint an exact point on the document. To turn on the laser pointer, click the **Laser On** button.

Note When you are finished using the laser, click the **Laser Off** button, which is located next to the Laser On button.

There are three methods for zooming in and out the camera:

1. Zoom Control buttons: These include the Zoom In and Zoom Out buttons as well as a drop-down menu with predefined granular zoom levels including 2x, 4x, 10x, and 15x.
2. Custom Zoom buttons: These buttons can be preset by the agent.

3. Predefined Zoom buttons: These buttons are preset by the administrator.

Step 7 Use the Zoom In and Zoom Out buttons to view the document's text at the desired size. Or choose a granular zoom level such as 2X or 10X from the drop-down menu.

Step 8 If you want to preset zoom positions, zoom to the desired enlargement and then click one of the **Preset**
buttons. Then to use a preset zoom position, click the **Execute** button next to it.

Step 9 Alternatively, you can use the predefined buttons that were programmed by your RE administrator. These typically are for specific sized documents such as driver's licenses, letter and/or legal, A3 or A4, etc.

Step 10 Before you take a snapshot, you can define the file's prefix to help you with organizing your snapshots.
Enter text in the Image Prefix field such as the customer's name.

Step 11 When you have zoomed in to the desired distance, turned the laser on or off, and chosen a prefix, click the **Capture Snapshot** button. The snapshot will appear in the lower window.

Step 12 Click the lower window to view the snapshot in full screen. Close the full screen view by clicking the X button in the upper right corner of the window.

✎

Note   You can also right-click the lower window and choose **View full screen**.

Step 13 If you want to copy the image to the clipboard, right-click on the image and choose **Copy to clipboard**.

You can change the file name. By default, the name of the file consists of the following:

- prefix (if configured)
- agent's directory number
- date
- time

Step 14 To rename the image file, double-click the file name and then enter the desired file name.

Step 15 If you want to delete an image from the application, click the image file and choose **Delete** or press the Delete key on your keyboard.

Step 16 When you no longer want to use the document camera, click the **Stop Camera** button.

⚠

Caution   Only use the **Force Cancel** button if the application is not responding to commands such as if the camera has frozen after pressing a zooming button multiple times. Provide an

explanation of the problem in the Cancel Job dialog box.

Step 17 Click the **X** button at the upper right corner to close the Document Camera application.

Connected Justice

Connected Justice (CJ) is an extension of Remote Expert Manager (REM). It includes two primary features: Click to Connect and Next Available Interpreter.

Next Available Interpreter (NAI)

The NAI feature has a specially designed user interface for the judicial authority. Court officials, such as judges or court clerks, are able to use a Remote Expert Interactive Console (REIC) in the courtroom to initiate an interpretation session to the next available language interpreter.

The REIC will display up to six languages queues with each language having its own button.

When the REM detects a call established between the court room and the interpreter, the NAI loads the IP phone dialing extensions of that court room into the desk phone of the interpreter via the Extension Mobility API. This allows the interpreter to call the court room directly and speak to the judge or if the interpreter has a question about what he or she is being asked to translate.

Click To Connect (CTC)

The CTC feature provides an easy-to-use user interface to communicate between the court rooms and the remote interpreters. The CTC interface is accessed by the interpreters when they have a scheduled appointment to translate during a trial or other court proceedings.

When the interpreter selects a desired court house and court room on the CTC web page, the CTC initiates a RE call between the court room and the interpreter. The RE call connects the interpreter to the court room via Telepresence endpoints, such as the EX90. At the same time, the CTC loads the phone dialing extensions of that court room into the desk phone of the interpreter via the Extension Mobility API provided by the Cisco Unified Communications Manager (CUCM).

When an interpreter has a CTC session, she/he is moved to the "Not Ready" state in CAD; this prevents the interpreter from being selected if a court official initiates a NAI request.

Step 1   Access the CTC application by entering **https://<CTC_IP>:8443/ctc** in your browser. The CTC interface appears.

Step 2   Under Segment, expand the segments, which could be counties, districts, or cities, and choose a court house.

Step 3   Choose a court room.

Step 4   Click the **Update Interpreter DN** button.

In the center panel, you will see a message to update the Interpreter DN.

Step 5   Click the **Update Interpreter DN** button.

Step 6   In the Agent Configuration dialog box, enter the DN and click **Submit**.

Step 7   In the center panel, click the green **Make a Call**.

The call is connected.

Step 8   To end the call, click the red **Disconnect** button in the center panel.

The Thank You screen appears.

Troubleshooting

eREAD/Finesse Issues

The following are issues that the agent may encounter using Finesse/eREAD:

- Multiple concurrent logins: If the agent is logged into Finesse using one browser and then logs into Finesse using another browser, the agent will not be automatically logged out of Finesse in the first browser. This could cause problems if the states of the different browsers are different.

- Failover error: If the Finesse server is down, you will be redirected to a failover server. You will need to login to the other server.

- Call connection error: When trying to call an agent or customer pod directly, the following message occurs: "Error Call could not be completed." If you are calling an agent, the agent may not be in the Ready state or is offline. If you are calling a customer pod, there is another call to the customer pod in progress or the customer pod is offline. Wait for awhile and then try to place the call again in case either is just in another call. If you made several attempts to call, it is likely that the destination is offline.

Direct Connect Issues

The following are issues that the agent may encounter using Direct Connect:

- **Direct Connect is stuck in "Waiting":** Check the DirectConnect.exe.config file to verify that the value of the property "cv_service_url" is set to the web service URL.

- **Direct Connect fails to share the application with the REIC:** First, verify that the border around the application being shared is green as shown in the figure below. If it is not green but red, click the shared window to turn the border green; this indicates that this application window is the active window. If the border is green but not sharing, verify that the collaboration URL is generated in the session table for this particular session.

Video Pane Issues

Video files are not displaying in the Video pane: A call must be initiated from the REIC in order for video files to display in the widget. If a call originates from a phone (i.e. a phone calling the UCCX Pilot number), the video files would not show because they could not be pushed to a phone.

Reference Links

The following are reference links to documentation that supports topics related to REM.
Moderro Remote Expert Manager Installation Guide
http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-install ation-guides-list.html

Moderro Remote Expert Manager Port Usage Guide

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

Moderro Remote Expert Manager Administration Guide

http://www.cisco.com/c/en/us/support/customer-collaboration/remote-expert-manager/products-mainte nance-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-trouble shooting-guides-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

Acronyms

The following acronyms are used in this guide:

- CUCM – Cisco Unified Communications Manager
- eREAD – Remote Expert Agent Desktop
- IEC – Interactive Experience Client
- IVR – Interactive Voice Response
- REAC – Remote Expert Admin Console
- REIC – Remote Expert Interactive Applications Control
- REM – Remote Expert Manager
- UCCE – Cisco Unified Contact Center Enterprise
- UCCX – Cisco Unified Contact Center Express
- UID – User ID
- VNC – Virtual Network Computing

Last Revised: June 1-, 2016

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