Cisco Agent Desktop—Browser Edition User Guide

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Cisco Agent Desktop—Browser Edition User Guide

Introduction

Cisco Agent Desktop—Browser Edition (CAD-BE) is a Java applet version of Cisco Agent Desktop that runs in a web browser.

CAD-BE provides call control capabilities (such as call answer, hold, conference, and transfer) and ACD state control (such as ready, not ready, and wrap-up). Customer information is presented to the agent through an enterprise data pane. CAD-BE also provides an integrated browser window so agents can view intranet, internet, and web application pages as needed.

> **NOTE:** The look and feel of the CAD-BE interface depends on the operating system of the PC on which CAD-BE is running. The screenshots in this user guide show the CAD-BE interface as it appears on Microsoft Windows XP.

Intended Audience

This document is written for contact center agents who use CAD-BE on their computers.

What's New In This Release

CAD-BE 8.0 includes these new features:

- Support for multiple lines on agent devices
- Support for Join Across Lines (JAL) and Direct Transfer Across Lines (DTAL) functionality
- Localization in two additional languages: Polish and Turkish

CAD-BE Feature Levels

There are three feature levels of CAD-BE: Standard, Enhanced, and Premium.

The following table lists the features that are available in each feature level of CAD-BE. Features that are not listed here are in all three feature levels.

Table 1. CAD-BE features

Feature	Standard	Enhanced	Premium
Agent-initiated call recording		●	●
Cisco IP Communicator support	●	●	●
Cisco Unified Mobile Agent support	●	●	●
Enterprise data thresholds		●	●
Event-triggered work flows		●	●
HTTP Get action		●	●
Integrated browser		●	●
Reason codes		●	●
Task buttons		●	●
Wrapup data		●	●

Language Support

CAD-BE is localized in the following languages:

- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- English
- French (Canada)
- French (France)
- German
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese (Brazil)
- Russian
- Spanish
- Swedish
- Turkish

Configuring Cisco IP Communicator

CAD-BE supports the use of the Cisco IP Communicator soft phone. This application is not provided with CAD-BE and must be purchased and installed separately.

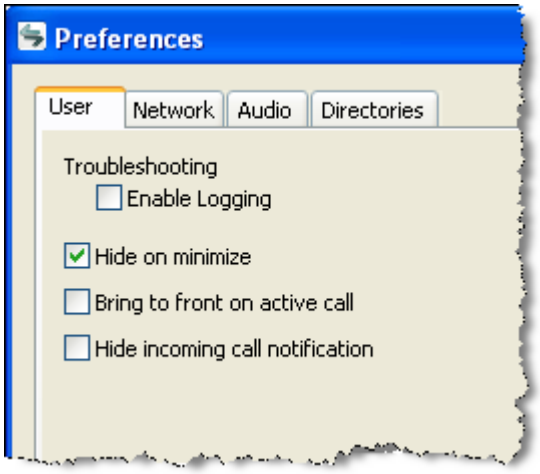
You must start IP Communicator manually (it does not start automatically when you start CAD-BE). To conserve system resources, keep IP Communicator minimized as much as possible and use the CAD-BE interface for call control.

To ensure that IP Communicator does not maximize when a call is received (the default setting), you must change your preferences as outlined in the following procedure.

To configure IP Communicator to remain minimized when a call is received:

1. Start IP Communicator.
2. Right-click anywhere on the interface to display a popup menu, and then choose Preferences. The Preferences dialog box appears.
3. On the User tab, select the Hide on minimize check box and clear the Bring to front on active call and Hide incoming call notification check boxes.
4. Click OK.

Figure 1. User settings in Preferences dialog box (detail view)



Logging in Using CAD-BE

You can log in using CAD-BE as a local agent or as a mobile agent. A local agent uses CAD-BE within the contact center. A mobile agent uses Cisco Unified Mobile Agent to connect to CAD-BE via any kind of phone (including a cell phone) from outside the contact center. For instructions about logging in, see the appropriate section below.

- Logging in as a Local Agent (page 9)
- Logging in as a Mobile Agent (page 11)

CAD-BE runs in the following web browsers:

Operating System	Supported Browsers
Microsoft Windows XP Professional with Service Pack 2 or Service Pack 3	Microsoft Internet Explorer 7 and 8 Mozilla Firefox 3.0
Microsoft Windows Vista Business, Enterprise, and Ultimate Editions with Service Pack 1	Microsoft Internet Explorer 7 and 8 Mozilla Firefox 3.0
Red Hat Enterprise Linux 4, 5	Mozilla Firefox 3.0

Both browsers must have the Java Runtime Environment (JRE) 6.0 plug-in installed. All popup blockers must be disabled. Consult your administrator for instructions on disabling your popup blockers, if any.

NOTE: If you do not have JRE installed when you try to start CAD-BE, you will be prompted to install it. After JRE is installed, CAD-BE will continue to start normally.

Multi-line Phones

CAD-BE supports multi-line phones. However, the number of lines supported is limited. You cannot log into a phone that has more than four lines (one ACD line and three non-ACD lines).

Only two calls per line are supported.

Logging in as a Local Agent

NOTE: If you are using Cisco IP Communicator as your phone, you must start IP Communicator before you log in using CAD-BE.

To log in as a local agent:

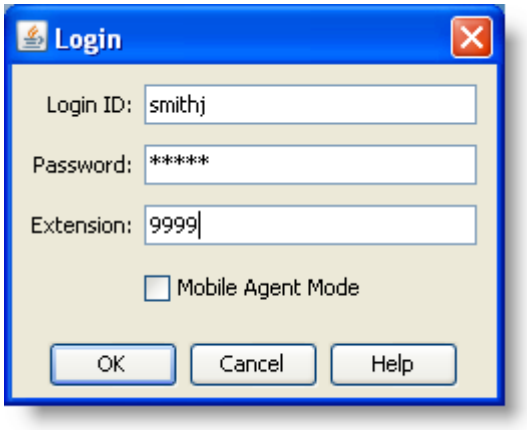
1. Start your web browser.
2. Type the following address in the address field, where <CAD server> is the IP address or hostname of the server that is hosting CAD.

   http://<CAD server>:8088/cadbe/CAD-BE.jsp

   NOTE: The address is case sensitive. Type the uppercase and lowercase letters exactly as shown.

3. Press Enter. The Login window appears (Figure 2).

Figure 2. Login window



NOTE: The Login window prompts for either login name or login ID, depending on the method that your administrator configured.

NOTE: A warning might appear, stating that the CAD-BE digital signature cannot be verified. This means that the web browser cannot verify the digital signature with a trusted source. To prevent this warning from displaying again, select the check box Always trust content from this publisher, then click Run to launch CAD-BE. Do not click Cancel. If you cancel, CAD-BE will run in restricted mode and some features will not function correctly.

4. Type your login name/ID, password, and extension in the appropriate fields, then click OK. You are now logged into CAD-BE in the Not Ready state.

   - If you enter a login name/ID that is already in use by another agent, a dialog box appears, asking if you want to log out the ID. If you choose yes, CAD will log out the agent using that ID and will log you in. This is known as a “forced login.”

- If you enter an extension that is already in use by another agent, an error message appears, stating that the extension is already in use. You must enter a different extension to log in.
- If the login method (Login Name or Login ID) is changed while you are logging in, an error message appears, stating that the login method has changed. You must restart CAD-BE to log in.

Logging in as a Mobile Agent

When you log in as a mobile agent, you can use any phone to receive calls that is accessible to the contact center phone system, including home phones and cell phones that are not directly connected to the contact center.

The Agent Login window you see might not display the Mobile Agent Mode check box. If you need to log in using mobile agent mode and the check box is not visible, ask your CAD administrator to enable it.

NOTE: The instructions in this document about using CAD-BE do not address important differences that apply when you log in as a mobile agent. Consult the "Using Unified Mobile Agent" section of the *Mobile Agent Guide for Cisco Unified CC Enterprise* for instructions on using your desktop when you log in as a mobile agent. This user guide is available for download on cisco.com (use the search function on the website to find the exact location).

NOTE: You *must* use CAD-BE for all call control operations as described below. If you use your phone for call control, you might lose the customer's call. Also, use CAD-BE to monitor call activities, such as conference status. This information is not displayed accurately (or not at all in some cases) on your phone. Consult your Cisco Unified Mobile Agent documentation for more information.

You can receive calls in either of two modes, Nailed Up Call mode or Call by Call mode.

- In Nailed Up Call mode, you receive one call that you answer using your physical phone when you log in. That line stays connected through multiple customer calls. You handle all call control through CAD-BE, including disconnecting the customer call. If you hang up your physical phone, you are logged out.
- In Call by Call mode, your physical phone is dialed for each customer call. Once you answer your physical phone, all call control is handled through CAD-BE, including disconnecting the call. When you hang up by disconnecting the call through CAD-BE and then hanging up your physical phone, you are placed in the Ready state and made available to receive another customer call.

To log into CAD-BE as a mobile agent:

NOTE: If you are not configured as a mobile agent, or if you choose a call mode you are not set up to use, your mobile agent login will fail. If this occurs, contact your administrator.

It is recommended that you use VPN to access your contact center network in order to have a more secure connection before you log in to CAD-BE. See your VPN instructions for more information.

1. Start your web browser.
2. Type the following address in the address field, where <CAD server> is the IP address or hostname of the server hosting CAD.

   http://<CAD server>:8088/cadbe/CAD-BE.jsp

   NOTE: The address is case sensitive. Type the uppercase and lowercase letters exactly as shown.

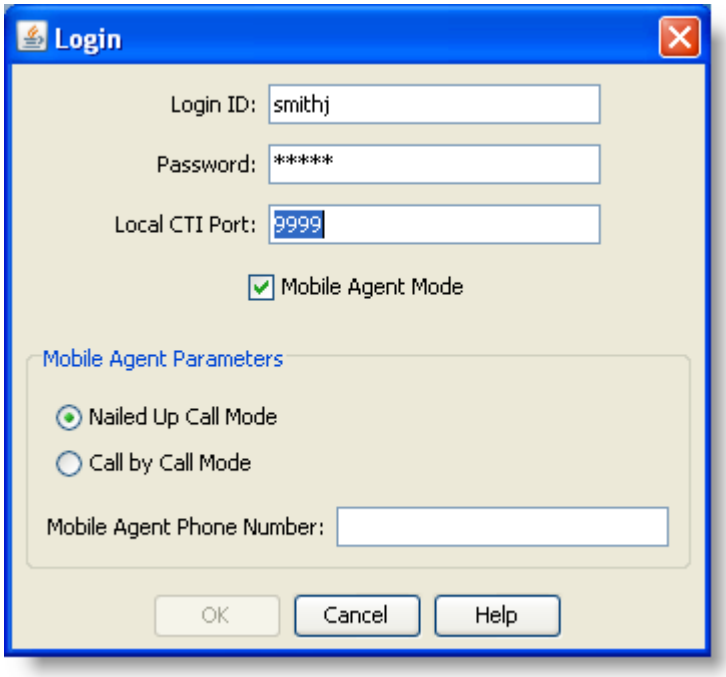
3. Press Enter. The Login window appears (Figure 2 on page 10).

   NOTE: A warning might appear, stating that the CAD-BE digital signature cannot be verified. This means that the web browser cannot verify the digital signature with a trusted source. To prevent this warning from displaying again, select the check box Always trust content from this publisher, then click Run to launch CAD-BE. Do not click Cancel. If you cancel, CAD-BE will run in restricted mode and some features will not function correctly.

4. Type your login name/ID, password, and extension in the appropriate fields.

5. Select the Mobile Agent Mode check box. The mobile agent Login window appears (Figure 3).

Figure 3. Mobile agent Login window



6. In the Mobile Agent Parameters section, select the call mode you want to use and type your phone number in the Mobile Agent Phone Number field.

   NOTE: Enter only numbers in the Mobile Agent Phone Number field. This field cannot include spaces, dashes, parentheses, or other non-numeric characters.

7. Click OK or press Enter to log in.You are now logged into CAD-BE in the Not Ready state.

Login Notes

- The Login Name/ID field has a maximum of 32 characters. The Password, Extension, and Mobile Agent Phone Number fields have a maximum of 64 characters.
- When you log in, you might see the error message, “A licensing error has occurred. Please see your administrator.” This generally appears when all CAD-BE software licenses are in use. For this reason, it is important that you log out of CAD-BE when you are done using it, rather than simply closing your browser.

- If you log in as a mobile agent using Nailed Up Call mode, you have only one phone line, and your phone line is busy, you are logged in and immediately logged out. If you have two phone lines with voice mail on the non-busy line, mobile agent rolls over to the second line, logs you in, and then when the voice mail hangs up, logs you out.
- When you are logging in as a mobile agent, you cannot log out a login name/ID that is already in use. If you see a dialog box asking if you want to log out the agent name/ID (force your login), answer No. You must log in with a different login name/ID.

Access Through a VPN From Behind a NAT Firewall or Router

CAD-BE is able to connect to the CAD servers through a virtual private network (VPN).

When a desktop is using network address translation (NAT) due to a firewall or router, then virtual private network (VPN) software must be used on the desktop to ensure full bi-directional network connectivity between the contact center servers and the desktop. Failure to use VPN software will result in connectivity issues and a loss in functionality such as silent monitoring and recording.

> **NOTE:** Using a VPN is recommended to provide a more secure connection when using CAD-BE outside the contact center.

The VPN connection must be established before starting CAD-BE. If the VPN connection is lost during a session, you must restart CAD-BE after the connection is reestablished.

It has been verified that Cisco VPN 3000 Concentrator and Cisco VPN Client work properly with CAD 8.0, and are supported for access. VPN solutions from other vendors might work correctly, but since they have not been formally verified, they are not supported. If you want an alternative solution to be verified, please contact your Cisco distributor.

Logging Out

You can log out only from the Not Ready agent state.

When you start CAD-BE, you use a software license. When you close CAD-BE, that software license is released so it is available for another agent to use. For this reason, it is important to close CAD-BE when you are done using it.

If you just log out, the software license remains in use. The software license is released automatically after CAD-BE has been idle for one minute.

There are two methods of logging out and closing CAD-BE.

Method 1: Logging Out and Then Closing CAD-BE (Recommended)

This method ensures that the software license you are using is released and is available for other agents to use.

To log out using Method 1:

1. Click Logout on the toolbar.
   - If your system is configured to require reason codes, before you are logged out the Reason Code dialog box appears. Choose the appropriate reason code and click OK.
   - If you are on a call when you click Logout, you will remain logged in until the call is ended.
2. Click Close (the X in the upper right corner of the window) to exit CAD-BE.

Method 2: Closing CAD-BE Without First Logging Out

With this method there is a small chance that the logout will not properly release the software license. If this occurs, the software license you are using will not be released until CAD-BE has been idle for one minute.

An agent can force the license to be released by using a forced login. See Logging in Using CAD-BE on page 9 for more information on forced logins.

To log out using Method 2:

- Click Close (the X in the upper right corner of the window).
  - If your system is configured to require reason codes, before you are logged out, the Reason Code dialog box appears. Choose the appropriate reason code and click OK.

- If you are on a call when you click Close, a dialog box appears asking you to confirm that you want to log out.
  - If you click Yes, you will remain logged in until you terminate the call.
  - If you click No, you will remain logged in and CAD-BE will remain open.

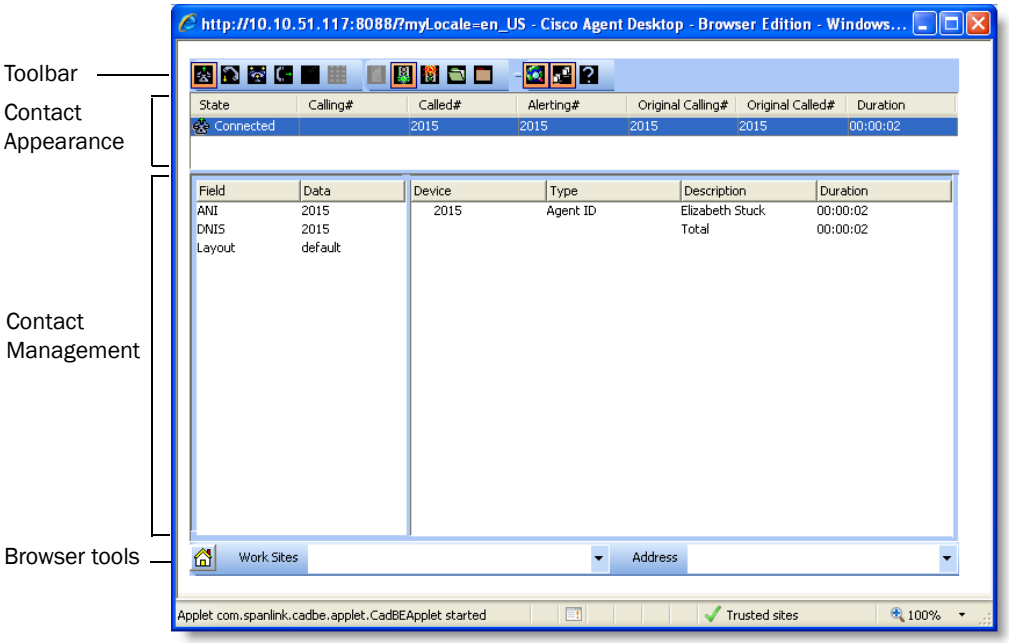
CAD-BE Interface

The CAD-BE interface displays information about active calls and provides phone call handling functions. It also provides access to websites in its integrated browser. The interface has the following parts:

- Toolbar
- Contact appearance pane
- Contact management pane
- Integrated browser tools

NOTE: Internet Explorer 7 has a security feature that places a non-editable address bar directly below the title bar in the CAD-BE interface. To remove this address bar, choose Tools > Internet Options, select the Security tab, and select either the Local intranet zone or the Trusted sites zone. Click Sites, then click Add. This adds the CAD-BE website to the zone you selected. (The Local intranet and Trusted sites zones have the setting “Allow websites to open windows without address or status bars” enabled.)

Figure 4. CAD-BE interface



Toolbar Buttons and Shortcut Keys

The toolbar contains buttons for call control and for functions not related to a specific customer contact, such as:

- Logging in and out
- Changing your agent state
- Configuring the appearance of the CAD-BE interface
- Starting and stopping call recordings (if task buttons are configured to perform these functions by your administrator)

Buttons on the toolbar are disabled if they control a function that is unavailable in your current situation. For example, if you have placed a call on hold, all other call control buttons are disabled. When you take the call off hold, the other call control buttons are enabled again. To view the name of a button, move the cursor over the button icon.

> **NOTE:** If your contact center is using the Enhanced or Premium CAD package, your toolbar can be configured by your administrator, and might contain different buttons than those listed below.

The following tables list the toolbar buttons and shortcut keys that you can use in CAD-BE.

Table 2 lists the toolbar buttons and shortcut keys for handling calls.

Table 2. Call handling toolbar buttons and shortcut keys

Icon	Name	Shortcut	Description
	Answer/Drop	Ctrl+A	Answers or drops the selected call.
	Hold/Unhold	Ctrl+H	Places the selected call on hold or takes it off hold.
	Conference	Ctrl+F	Places the selected call on hold and opens the Conference window.
	Transfer	Ctrl+T	Places the selected call on hold and opens the Transfer window.
	Touch Tones	Ctrl+D	Opens the Enter Touch Tones window.
	Make Call	Ctrl+M	Opens a window from which you can dial a call.

Table 3 lists the toolbar buttons and shortcut keys for changing agent state.

Table 3. Agent state toolbar buttons and shortcut keys

Icon	Name	Shortcut	Description
	Login	Ctrl+L	Logs you into the ACD (alternates with Logout).
	Logout	Ctrl+L	Logs you out of the ACD (alternates with Login).
	Ready	Ctrl+W	Changes your state to Ready, indicating that you are available to receive ACD calls.
	Not Ready	Ctrl+O	Changes your state to Not Ready, indicating that you are not available to receive ACD calls.
	Work Ready	Ctrl+Y	Changes your state to Work Ready, indicating that you will be available to receive ACD calls after you finish wrap-up work.
	Work Not Ready	Ctrl+Z	Changes your state to Work Not Ready, indicating that you will not be available to receive ACD calls after you finish wrap-up work.

Table 4 lists the toolbar buttons and shortcut keys for managing windows.

Table 4. Window management toolbar buttons and shortcut keys

Icon	Name	Shortcut	Description
	Task1-10	Alt+1, Alt+2... Alt+0	(Enhanced/Premium only) One to ten task buttons can be set up to perform one or several functions by the administrator.
	Contact Mgmt	Ctrl+G	Shows or hides the Contact Management panes.
	Browser	Ctrl+B	(Enhanced/Premium only) Shows or hides the integrated browser pane.
	Help/About	Alt+Ctrl+H	Opens a menu listing the Help and About options.

Table 5 lists the shortcut keys for moving the cursor to various text elements in the CAD-BE interface so a screen reader can read the text.

Table 5. Main window screen reader shortcut keys

Shortcut	Description
Ctrl+E	Selects a row in the Enterprise Data portion of the Contact Management pane.
Ctrl+S	Selects a contact in the Contact Appearance pane.

Contact Appearance Pane

The contact appearance section displays data about the agent's current call appearances. There can be more than one call appearance in the section. For example, you might have one call on hold and one active call—both will be displayed.

The contact appearance pane can display up to nine fields. The State field will always be present; the other eight fields are configurable by the administrator.

Table 6 lists the available fields.

Table 6. Contact Appearance fields

Field	Always Visible?	Description
State	Yes	The current state of the contact.
Duration	No	The length of the phone call.
Calling#	No	The number of the originating device.
Called#	No	The number of the destination device.
Alerting#	No	The number of the ringing device.
Original Called#	No	The original number called.
Original Calling#	No	The initial originating number.
Skill	No	The skill ID, displayed only if the call is an inbound ACD call.
ACD Line	No	Yes/No. Indicates if the call is on an ACD or non-ACD line.

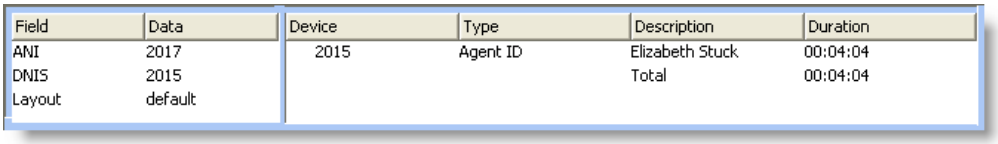
Some fields might display <Unavailable> or be blank if the call information is unknown or does not exist.

Whenever the IP IVR is involved in a call, CAD-BE displays the same information about the call in the contact appearance pane as your IP phone displays on its screen. Enterprise Data might display different data because it tracks the entire life of the call.

Contact Management Pane

The contact management pane contains enterprise data (on the left) and call activity information (on the right) for all inbound and outbound calls.

Figure 5. Contact Management pane



You can click the Show/Hide Contact Management button on the toolbar to show or hide this pane of the interface.

Enterprise Data

The enterprise data pane displays data associated with the selected call. The exact data that is displayed is configured by your administrator.

Call Activity

The call activity section displays the call activity for the selected call.

Table 7. Call Activity fields

Field	Description
Device	List of devices the call passed through.
Type	Type of device the call passed through.
Description	Description of the device the call passed through.
Duration	The amount of time the call is at the device.
Total	Sum of all the durations listed.

NOTE: Some calls can be on multiple devices simultaneously. For example, if a call is placed in multiple queues or is conferenced to multiple extensions, the call activity section displays the duration of the call on each individual device, and overlapping times are not

indicated. In this case the total duration is the sum of the time spent on these overlapping devices, and is greater than the actual amount of time the call spends in the contact center.

Thresholds

A threshold is the acceptable amount of time a call can remain at a particular device or contact center. Your administrator might assign caution and warning threshold values to each device type, as well as a total threshold value for a call.

If a call remains at a device longer than the defined caution and warning thresholds, a caution or warning icon is displayed in the call activity pane next to the device. These icons are:

Caution

Warning

Integrated Browser Pane

The integrated browser pane contains controls that allow you to view intranet and internet web pages to help you assist customers. The web pages you select are displayed in another browser window.

Your administrator can configure a specific website to display as your home page, and add a list of work sites (similar to web browser “favorites”) that allow you to navigate to frequently-used websites quickly.

The integrated browser pane has the following parts:

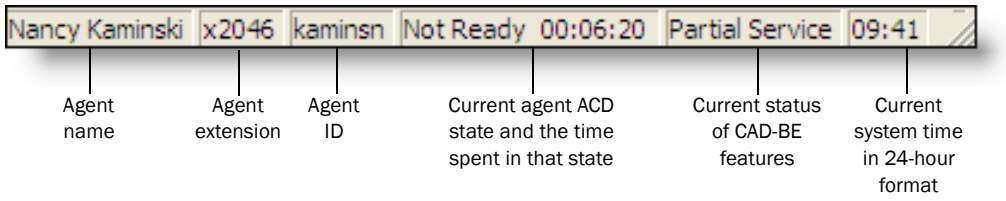
- Home button
- Work Sites drop-down list
- Editable Address field (if configured by the administrator)

For more information about this pane, see "Using the Integrated Browser" on page 32.

Status Bar

The status bar displays current information about CAD-BE (Figure 6).

Figure 6. Status bar



In the event of a service failure, the Current Status section changes from “In Service” to “Partial Service” or “No Service”. To learn what features are affected by the service outage, double-click the Current Status section to view a popup window that displays which features are active or inactive.

For more information on the Current Status popup window and service autorecovery, see "Service Status Window" on page 35.

Dial Pad Window

The dial pad window allows you to make phone calls by entering a number in the Number field. You can enter the number either by typing it or by clicking the number keys.

“Dial pad” is the general name for this window. The name that appears in the title bar depends on the task you are doing, and can be either Make Call, Transfer, or Conference.

Figure 7. Dial Pad window

Handling Calls

You can use the CAD-BE interface, a hard IP phone, or IP Communicator to handle phone calls. This section assumes you are using the CAD-BE interface.

> **NOTE:** If you are logged in as a mobile agent, you must use the CAD-BE interface to handle calls.

Entering Phone Numbers

When dialing a phone number, you can use the following methods to enter the phone number into the Number field in the dial pad.

- Type the phone number on your PC keyboard
- Select the numbers from the dial pad window

When typing a phone number, do not include spaces, dashes, or parentheses. CAD-BE accepts only numbers in the Number field.

In the following sections, whenever you are instructed to enter a number in the Number field, you can do so using either of these methods.

Answering a Call

You can receive ACD and non-ACD calls through CAD-BE. You must be logged in and be in the Ready state to receive an ACD call. You can be in any state to receive a non-ACD call.

To answer a call:

- Click Answer.

To terminate a call:

- Click Drop.

Making a Call

You must be in the Not Ready state to make a call. The Make Call button is disabled when you are in the Ready state.

To make a call:

1. Click Make Call. The Make Call window appears.
2. Enter a number in the Number field.

3. Click Dial.

NOTE: If you are a mobile agent using Call by Call mode, your phone rings before the destination phone does when you place an outbound call. You must answer your own phone first, and then the destination phone rings.

NOTE: If you are a mobile agent and make a call to a busy phone, you will not hear a busy tone, just silence or on-hold music. However, the contact appearance pane displays the Busy state.

Entering Touch Tones During a Call

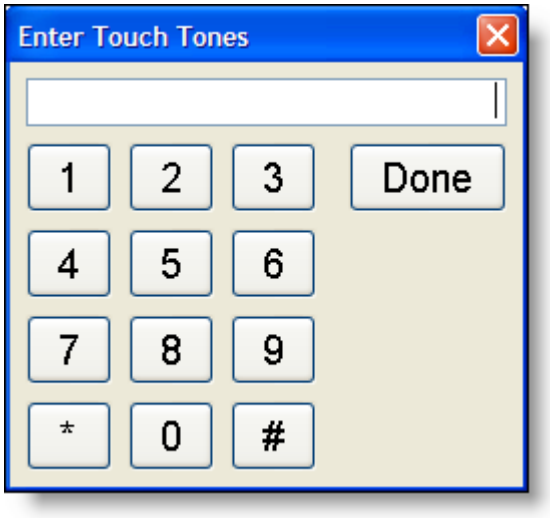
Some situations might require you to send touch tones during a call. For example, while accessing an Interactive Voice Response (IVR) system, you might be prompted to enter one or more numbers indicating a menu choice or an account number.

You can send touch tones during a call by clicking the appropriate buttons in the Touch Tones window.

To enter touch tones:

1. When prompted to enter numbers during a call, click Touch Tone. The number pad appears (Figure 8).

Figure 8. Touch Tones number pad



2. Enter the required numbers and/or symbols, then click Done. The number pad closes and you are returned to the CAD-BE interface.

Transferring a Call

There are two types of transfer calls:

- **Blind transfers**. In a blind transfer, you transfer the active call to the third party without speaking. You hang up before the third party answers the phone and therefore cannot confirm if the third party is ready to accept the call.
- **Supervised transfers**. In a supervised transfer, you speak to the third party to whom the call is being transferred before connecting the active call, in order to confirm that the third party is ready to accept the call. The Alternate function allows you to put the third party on hold and pick up the original call before completing the transfer.

  NOTE: If failover occurs while transferring a call, the Dial Pad window closes. You must end the call to the transfer recipient and initiate the call again in order to transfer the call on hold.

To transfer a call:

1. With a call active, click Transfer. The Transfer window appears.
2. Enter the phone number to which you are transferring the call in the Number field.
3. Click Dial.
4. Take one of the following actions:
   - For a blind transfer, click Transfer when the phone starts ringing.
   - For a supervised transfer, wait for the phone to be answered, then announce the transfer. If you want to place the new call on hold and pick up the original call, click Alternate. Then click Transfer.

Making a Conference Call

You can add other parties to an active call to make a conference call.

There are two types of conference calls:

- **Blind conference**. In a blind conference, you add the third party to the conference without speaking to him or her.
- **Supervised conference**. In a supervised conference, you speak to the third party you want to add to your call before completing the conference, in order to confirm that the third party is ready to accept the call. The Alternate function allows you to put the third party on hold and pick up the original call before completing the conference.

NOTE: If you use a blind conference to add someone to your call, the call might or might not be tagged as a conference call.

NOTE: If failover occurs while conferencing a call, the Dial Pad window closes. You must end the call to the conference recipient and initiate the call again in order to complete the conference.

To make a conference call:

1. With a call active, click Conference. The Conference window appears.
2. Enter the phone number of the person you want to add to the call in the Number field.
3. Click Dial.
4. Take one of the following actions:
   - For a blind conference, click Add to Conf. when the phone starts ringing.
   - For a supervised conference, wait for the phone to be answered, then announce the conference. If you want to place the new call on hold and pick up the original call, click Alternate. Then click Add to Conf.
5. To add one or more people to the conference call, repeat Steps 1 to 4 for each person.

   NOTE: The upper limit on the number of participants on a conference call is determined by settings in Cisco Unified Communications Manager (Unified CM). Ask your supervisor for the maximum that is configured for your contact center.

Supervisor Involvement

Your supervisor can be involved in your contact with customers in several ways:

- By intervening in the customer call
- By changing your agent state
- By pushing web pages for you to view in your integrated browser

Call Involvement

Your supervisor can be involved in calls you receive. He or she can:

- Barge in on a call—join your call with a customer in a forced conference
- Intercept a call—transfer a customer call to him or herself in a forced transfer
- Monitor your calls
- Record your calls for review later

You are notified when your supervisor barges in or intercepts your phone call by the appearance of a popup window. You might or might not be notified when your supervisor monitors or records your calls, depending on how the system is configured.

Browser Involvement

Your supervisor can push (send) a selected web page to your integrated browser window. This enables your supervisor to coach you during a call by providing information that will help you work with a customer.

Agent State Involvement

Your supervisor can change your agent state and log you out of CAD-BE. You are not notified when your supervisor changes your agent state. You can tell which state you are in by which agent state toolbar button is enabled or disabled or by looking at the state field on the status bar.

Agent States

CAD-BE allows you to change your agent state in the ACD through the use of the agent state buttons. Only the agent states that are valid choices from your current agent state will be available at any given time.

You can change your agent state while on a call (in the Talking state). Your state will change to the state you clicked after you hang up the call.

The agent state buttons indicate the state you clicked, not your current state. For instance, if you click the Work Not Ready state button while on a call, the Work Not Ready button appears to be pressed.

Table 8 lists the available agent states.

Table 8. Agent states

State	Description
Hold	You are on the phone with a customer and have the call on hold. This state is automatically set for you by the ACD and does not have a corresponding button.
Logout	You are logged out of the ACD.
Not Ready	You are not available to receive ACD calls.
Ready	You are available to receive ACD calls.
Reserved	You are temporarily set aside to receive a specific ACD call. Your state changes to the Talking state when you answer the call. If you fail to answer the call within a time limit specified by the system administrator, the ACD places you in a Not Ready state. The Reserved state is automatically set for you by the ACD and does not have a corresponding button. You can be in this state without the phone ringing (you are waiting for it to ring).
Talking	You are on the phone with a customer or another agent. This state is automatically set for you by the ACD and does not have a corresponding button.
Work Not Ready	You are completing work from a previous call, and are unavailable to receive ACD calls. You change to the Not Ready state when: • You enter wrap-up data (if enabled by the system administrator) • A timer set in the ACD expires (if the ACD uses this feature) • You manually change state after you enter wrap-up data

Table 8. Agent states (cont'd)

State	Description
Work Ready	You are completing work from a previous call, and are available to receive ACD calls. You change to the Ready state when: • You enter wrap-up data (if enabled by the system administrator) • A timer set in the ACD expires (if the ACD uses this feature) • You manually change state after you enter wrap-up data

Using the Integrated Browser

The integrated browser feature is available in the CAD Premium and Enhanced packages. This feature allows you to view intranet and internet web pages while working with CAD-BE. The web pages are displayed in a separate browser window that, unlike CAD-BE itself, contains the web browser toolbar and menu bar.

You can click Show/Hide Integrated Browser on the CAD-BE toolbar to show or hide the integrated browser pane.

Your administrator might configure a specific web page to display in the browser pane as your home page. If the administrator does not do this, the pane is blank except for the message, “The home page is not configured in Desktop Administrator.”

If configured by your administrator as part of a work flow, CAD-BE can use call enterprise data to interact with a web application, such as a customer database, and display customer information in the integrated browser.

Accessing Work Sites

Your administrator can set up a list of frequently-used web sites. These “favorites” appear in the Work Sites box. You can select a website from this drop-down list to access it quickly, without having to type in its web address.

Accessing Other Websites

Your administrator can configure the browser to include the optional Address field. This enables you to access a website that is not listed in the Work Sites box.

To access a website using the Address field:

- Type the website address (URL) in the Address field, then press Enter.

Accessing Your Home Page

You can always return to your home page (set up by your administrator) by clicking Home ( ), or by pressing Alt+Home.

Supervisor Intervention

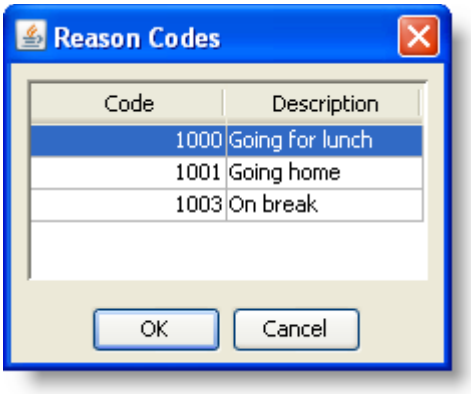
Your supervisor can “push” a web page to your browser. See "Browser Involvement" on page 29 for details.

Reason Codes

Reason codes describe the reason that you have changed your state to Not Ready or Logout. These codes are configured by your administrator and are customized for your contact center. Your administrator can configure CAD-BE so that you are required to enter reason codes.

If you are required to use reason codes, whenever you initiate a transition to Not Ready or Logout, or such a transition is included in a work flow, a dialog box appears (Figure 9). You must select the appropriate code from that dialog box and click OK or press Enter to complete the transition.

Figure 9. Reason Codes dialog box



You can select the Not Ready agent state again when you are already in the Not Ready state. This enables you to enter another reason code. Reports will show back-to-back Not Ready state changes with the appropriate times in state and the respective reason codes.

There are several situations in which you will not see the reason code dialog box:

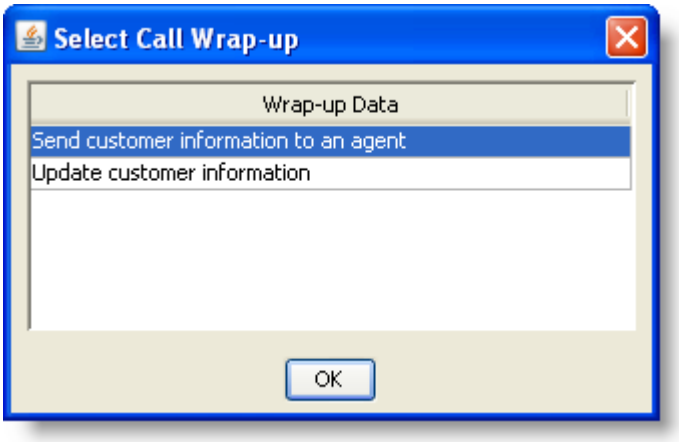
- Your supervisor initiates the transition. In this case, a reason code that indicates that the supervisor forced the agent state change is automatically selected.
- Your agent state is changed automatically from Ready to Not Ready when an ACD call is routed to your phone but you do not answer it, and it is rerouted to another agent (Reroute on No Answer, or RONA)
- Your agent state is changed automatically from Ready to Not Ready when you receive a non-ACD call

Wrap-up Data

Contact centers use wrap-up data for numerous reasons, including tracking the frequency of specific activities or identifying accounts to which calls should be charged. Like reason codes, wrap-up data descriptions are configured by your administrator to reflect the needs of your contact center. Your administrator can configure CAD-BE so that you are required to enter wrap-up data.

If you are required to use wrap-up data, whenever your state changes to Work Ready or Work Not Ready immediately after you end a call, the Select Call Wrap-up dialog box appears (Figure 10). (This occurs when you click the Work Ready or Work Not Ready button during a call.) You must select the appropriate description from the dialog box and click OK or press Enter to complete the transition.

Figure 10. Wrap-up data dialog box



Service Autorecovery

The service autorecovery feature allows CAD-BE to automatically recover its connection to the CAD services in the event of a service restart or a network outage.

If you log back in within one minute after service recovery using the same login name/ID and password, your state will automatically be the same as the state you were in when the service or network connection failed.

> **NOTE:** You are not notified when you log in about any inactive services. You are notified if a service stops after you log in.

When CAD-BE detects that it is unable to communicate with a service (generally within three minutes of the service failure), a message appears, stating that CAD-BE is unable to connect to the service.

When CAD-BE detects that the service is again available (usually within one minute of service recovery), a message appears, stating that CAD-BE is now able to connect to the service.

> **NOTE:** When Unified Communications Manager (Unified CM) fails, you are logged out. You must manually log back in after Unified CM recovers; login is not automatic.

Service Status Window

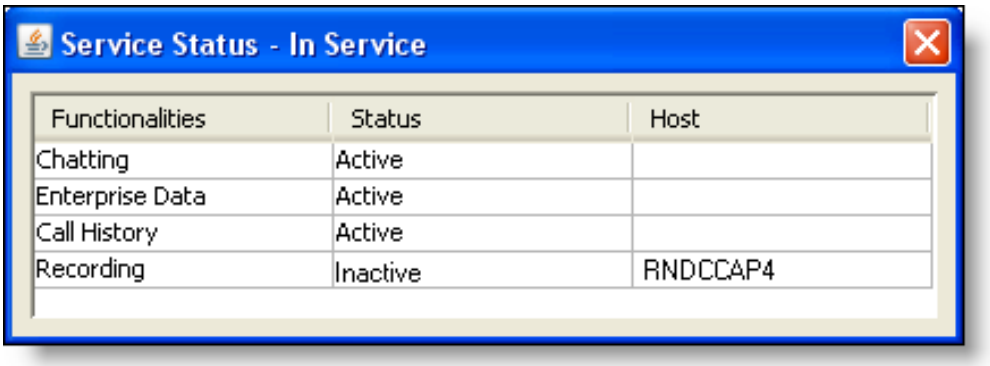
When CAD-BE detects that it is unable to communicate with a service (generally within three minutes of the service failure), the status bar displays “Partial Service” or “No Service” to indicate some or all of the services have failed.

When CAD-BE detects that the service is again available (usually within one minute of service recovery), the status bar displays “In Service” to indicate the services have recovered.

To learn more about what is affected by the service failure, double-click the status message on the status bar. CAD-BE displays a popup box that lists CAD-BE features

and indicates if that feature is available or not due to the service outage (Figure 11). The server that hosts the failed service is listed in the Host column. This field can display either the host's IP address, host name, or both.

Figure 11. Server Status popup dialog box



Loss of BIPPA Service

Non-Redundant Systems

If you lose your connection to the Browser and IP Phone Agent (BIPPA) service, CAD-BE continually tries to reconnect. When CAD-BE is successfully reconnected to the BIPPA service, the system prompts you to log in again.

Redundant Systems

If you lose your connection to one BIPPA service in a redundant system, CAD-BE attempts to connect to an active BIPPA service until a connection is made. At that time the system prompts you to log in again.

If you are unable to connect to a BIPPA service on your initial login, you receive an error message that the service is unavailable and CAD-BE closes. In this case, you must manually redirect your browser to the redundant BIPPA service and log in to that service as usual.

Loss of CTI Service

If the CTI service stops running, but all of the other CAD services are still running, you will not be able to log in. You will be prompted to try logging in again until you are successful.

Loss of LDAP Service

If the LDAP service is not running when you try to log in, your login will not be successful. If the LDAP service stops running while you are logged in, your session will not be affected.

Loss of LRM Service

If the LRM service is not running when you try to log in, your login will not be successful. If the LRM service stops running while you are logged in, your session will not be affected.

Loss of Other Services

If other CAD services go down while you are logged in, you might lose some functionality but you will not be logged out.

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