



Cisco Agent Desktop—Browser Edition User Guide

CAD 8.0 for Cisco Unified Contact Center Express Release 8.0
Cisco Unified Communication Manager Express Edition
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Cisco Agent Desktop—Browser Edition User Guide

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Contents

Cisco Agent Desktop—Browser Edition User Guide

- Introduction 5
 - Intended Audience 5
- CAD-BE Interface 6
 - Toolbar Buttons and Shortcut Keys 7
 - Contact Appearance Pane 8
 - Contact Management Pane 9
 - Enterprise Data 9
 - Call Activity 9
 - Integrated Browser Pane 10
 - Status Bar 11
- Cisco IP Communicator 12
- Starting CAD-BE and Logging In 13
 - Logging In 13
 - Login Notes 14
 - Access Through a VPN From Behind a NAT Firewall or Router 15
- Logging Out 16
- Handling Calls 17
- Predefined High-Priority Chat Messages 18
- Using Recording 19
- Supervisor Involvement 20
 - Call Involvement 20
 - Agent State Involvement 20
 - Browser Involvement 20
- Agent States 21
- Using the Integrated Browser 22
 - Accessing Work Sites 22
 - Accessing Other Websites 22
 - Accessing Your Home Page 22
 - Supervisor Intervention 22
- Reason Codes 23
- Wrap-up Data 24

Contents

- Service Autorecovery 25
 - Service Status 25
 - Loss of BIPPA Service 26
 - Loss of CTI Service 26
 - Loss of LDAP Service 26
 - Loss of Other Services 26

Index 27

Cisco Agent Desktop—Browser Edition User Guide

Introduction

Cisco Agent Desktop—Browser Edition (CAD-BE) for Cisco Unified Contact Center Express is a Java applet version of Cisco Agent Desktop that runs in a web browser. It is available in the CAD Enhanced and Premium bundles.

CAD-BE provides ACD state control—ready/not ready, wrap-up, and so on. 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.

Intended Audience

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

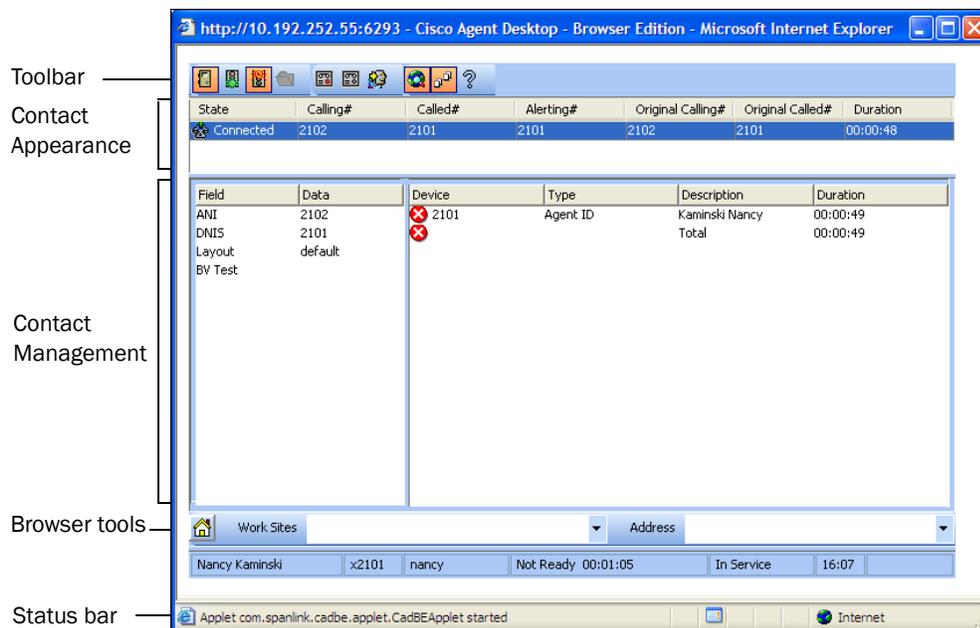
CAD-BE Interface

The CAD-BE interface (Figure 1) displays information about active calls. 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
- Status bar

NOTE: Internet Explorer 7 and 8 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 1. CAD-BE interface



Toolbar Buttons and Shortcut Keys

The toolbar contains buttons 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. To view the name of a button, move the cursor over the button.

NOTE: 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 1](#) lists the toolbar buttons and shortcut keys for changing agent state.

Table 1. 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	Ctrl+Y	Changes your state to Work, indicating that you will be available to receive ACD calls after you finish wrap-up work.

[Table 2](#) lists the toolbar buttons and shortcut keys for managing windows.

Table 2. Window management toolbar buttons and shortcut keys

Icon	Name	Shortcut	Description
	Task1-10	Alt+1, Alt+2, ..., Alt+0	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	Shows or hides the integrated browser pane.
	Help/About	Alt+Ctrl+H	Opens a menu listing the Help and About options.

[Table 3](#) 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 3. 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 can have one call on hold and one active call—both will be displayed.

The contact appearance pane can display up to 7 fields. The State field will always be present; the other five fields are configurable by the administrator.

[Table 4](#) lists the available fields.

Table 4. Contact Appearance fields

Field	Always Visible?	Description
State	Yes	The state of the contact.
Calling#	No	The number of the originating device.

Table 4. Contact Appearance fields (cont'd)

Field	Always Visible?	Description
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.
Duration	Yes	The length of the call.

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. 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 5](#) lists the Call Activity fields.

Table 5. 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.

Table 5. Call Activity fields (cont'd)

Field	Description
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 22](#).

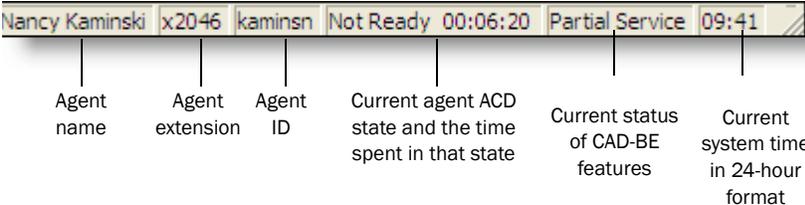
Status Bar

The status bar displays current information about CAD-BE (Figure 2).

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" on page 25.

Figure 2. Status bar



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).

Starting CAD-BE and Logging In

CAD-BE runs in the following web browsers:

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

Your system must have the Java Runtime Environment (JRE) plug-in version 1.6.0_12 installed. All popup blockers must be disabled. Consult your administrator for instructions on disabling your popup blockers, if any.

Problems with JRE

If you do not have JRE installed when you try to start CAD-BE, you will be prompted to install it. Click Run to install JRE. After JRE is installed, you might have to relaunch CAD-BE.

If the version of JRE you have installed is other than 1.6.0_12, and you are using Internet Explorer, you will receive no error messages, you will be able to log in, and CAD-BE might function. If you are using Firefox, CAD-BE will display an error message and not allow you to log in.

Logging In

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

To log in:

1. Start your web browser.
2. Type the following address in the address field, where <Unified CCX server> is the IP address or hostname of the server that hosts Cisco Unified Contact Center Express.

`https://<Unified CCX server>/cadbe/CAD-BE.jsp`

NOTE: A warning might appear, stating that this website's certificate cannot be verified. To prevent this warning from displaying again, select the check box Always trust content from this publisher, then

click Yes to launch CAD-BE. Do not click No. If you click no, then CAD-BE will not launch.

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

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

Figure 3. Login window



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, the agent using that ID will be logged out and you will log in.
 - 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.

Login Notes

- The Login Name/ID field has a maximum of 32 characters. The Password and Extension 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 agent 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.

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, CAD-BE automatically reconnects to Unified CCX when the connection is restored. When you log in again, you can resume handling calls.

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 from any agent state.

To log out:

1. Click Logout on the toolbar. If your system is configured to require reason codes, the reason code menu appears. Choose the appropriate reason code, then click OK. You are now logged out of the ACD.
2. Exit CAD-BE by clicking Close (the X in the upper right corner of the window).
3. Click Close to close the integrated browser window, if it is open.

NOTE: You should log out before you exit CAD-BE. If you exit CAD-BE without logging out, you will remain logged into the ACD, in Not Ready state, for another one minute. While CAD-BE is running, one agent software license remains in use, which might prevent another user from logging in. After one minute you will be automatically logged out.

Handling Calls

You must use your hard IP phone or IP Communicator to handle calls (answering, dialing, transferring, conferencing, holding, and so on).

NOTE: See your IP phone documentation for explanations of your phone's functions and features.

Predefined High-Priority Chat Messages

You might have a task button configured to send a high priority chat message to your supervisor(s). This chat message is a predefined message set up by your administrator (for instance, “Please barge in to my call”). It appears in a Chat Session window that pops up on your supervisor’s desktop. This message is one-way only. Your supervisor cannot send a chat message back to you.

Using Recording

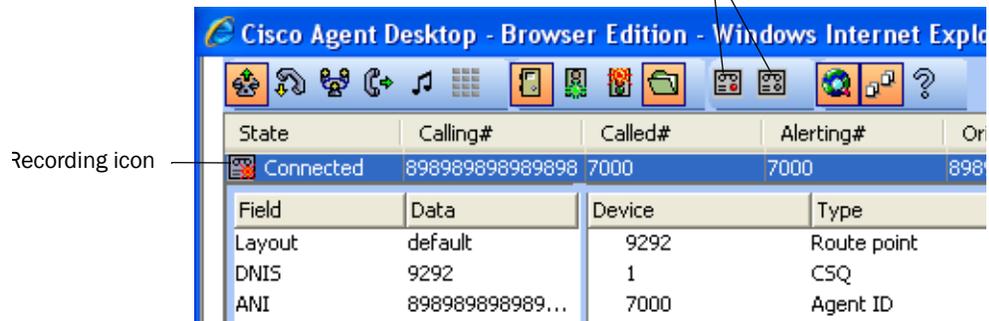
You can record calls if you are set up to do so by your administrator. The administrator customizes your toolbar with two task buttons: one button starts recording and the other button stops recording (Figure 4).

NOTE: The default icons for customizable task buttons are green circles with numbers inside them, like this: . Using them on the CAD-BE toolbar is optional. Your administrator can choose to use other icons for the buttons assigned to the recording functions.

When you are recording a call, the icon next to the call information in the Call Activity pane changes from the Talking icon  to the Recording icon . When recording a

Figure 4. Recording a call

In this instance of CAD-BE, custom icons, not the default task buttons, are used to start and stop recording.



call, keep in mind the following:

- The recording starts when you are connected to a customer call and you click Start Recording.
- The recording ends automatically when the call terminates, or when you click Stop Recording, whichever comes first.
- You cannot use the Stop Recording button to stop a recording that your supervisor started. If you do click Stop Recording in this situation, the recording icon will disappear from the Call Activity pane, but the call will still be recorded until your supervisor stops it.
- Your supervisor can stop a recording that you started.
- Only your supervisor can play back recordings that you make.

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:

- Monitor your calls
- Record your calls for review later

You might be notified when your supervisor monitors or records your calls, depending on how the system is configured.

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 the agent state field in the status bar or by which agent state toolbar button is enabled or disabled.

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 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 state button while on a call, the Work button appears to be pressed.

[Table 6](#) lists the available agent states.

Table 6. 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	You are completing work from a previous call, and are unavailable to receive ACD calls.

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 websites. 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 ["Agent State Involvement" on page 20](#) 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, a dialog box appears (Figure 5). You must select the appropriate code from that dialog box and click OK or press Enter to complete the transition.

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.

Figure 5. Reason Codes dialog box



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

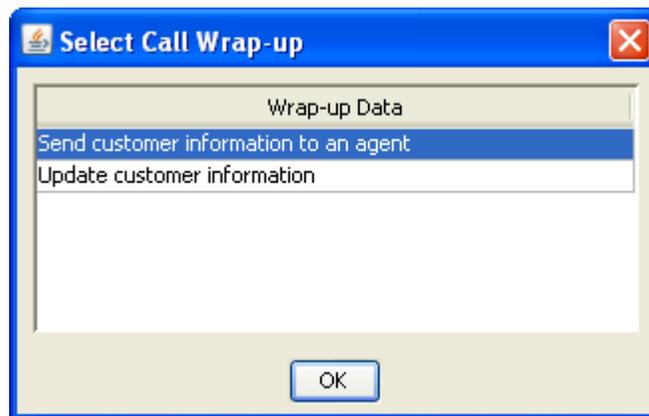
- Your supervisor initiates the transition. In this case, a reason code that indicates that the supervisor forced the agent state change is automatically selected.
- Your agent state is changed automatically from Ready to Not Ready when an ACD call is routed to your phone but you do not answer it, and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

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 immediately after you end a call, the Select Call Wrap-up dialog box appears (Figure 6). (This occurs when you click the Work 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 6. 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 CME or Unified Contact Center Express (Unified CCX) fails, you are logged out. You must manually log back in after Unified CME recovers; login is not automatic.

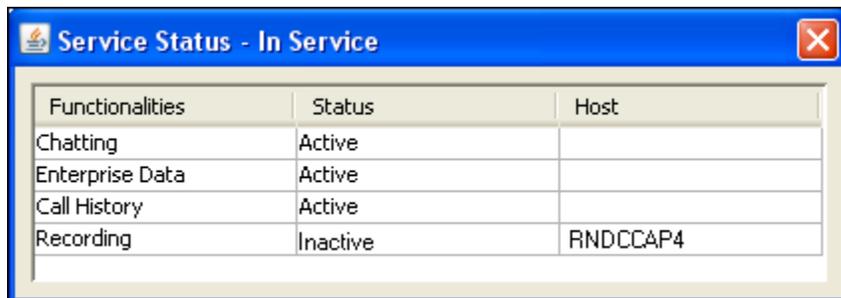
Service Status

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 features and indicates if that feature is available or not due to the service outage ([Figure 7 on page 26](#)). 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 7. Server Status popup dialog box



Functionalities	Status	Host
Chatting	Active	
Enterprise Data	Active	
Call History	Active	
Recording	Inactive	RNDCCAP4

Loss of BIPPA Service

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.

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 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.

Index

A	L
Agent states 21	Logging in
Autorecovery 25	as local agent 13
	Logging out 16
C	P
Call activity 9	Phone calls
thresholds 10	entering phone numbers 17
Chat	recording 19
high priority messages 18	
Cisco Agent Desktop–Browser Edition	
interface 6	R
Contact appearance pane 8	Reason codes 23
Contact management pane	Recording phone calls 19
call activity 9	
enterprise data 9	S
E	Service autorecovery 25
Enterprise data 9	Service status 25
H	Shortcut keys 7
High-priority chat messages 18	Status bar 11
I	Supervisor involvement
Integrated browser	changing agent states 20
accessing other websites 22	intervening in calls 20
home page 22	pushing web pages 20
work sites 22	Supported web browsers 13
Integrated browser pane 10	
Interface	T
service status 25	Thresholds 10
status bar 11	Toolbar buttons 7
	W
	Wrap-up data 24

