Cisco Agent Desktop User Guide

Cisco Unified Contact Center Enterprise Release 7.2
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Revision Date	Description
June 2007	First Customer Ship (FCS), version 7.2(1)
10-Jul-07	Added information about login ID/login name persistence to the login procedure

Revision History

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Introduction

Cisco Agent Desktop for Cisco Unified Contact Center Enterprise and Hosted, Windows client edition, is a robust computer telephony integration solution that is easy to install, configure, and manage. It provides agents with powerful tools to increase productivity, reduce operational costs, and improve customer satisfaction.

Cisco Agent Desktop provides call control capabilities—such as call answer, hold, conference, and transfer, and ACD state control—ready/not ready, wrap up, etc. Customer information is presented to the agent through an enterprise data window and an optional screen pop. Cisco Agent Desktop requires minimum screen real estate and enables agents to customize its functionality to meet their individual needs.

What's New In This Release

Cisco Agent Desktop 7.2 includes these new features:

- The interface supports the Microsoft Windows High Contrast Mode display setting to increase accessibility
- The interface has been updated to the Microsoft 2003 theme
- Reason Code and Wrap-up Data dialog boxes are now sortable
- If enabled by the administrator, the agent has control of how the Agent Desktop window behaves
- If enabled by the administrator, the agent is notified that a workflow-initiated recording of a call is being made by the display of the recording icon next to the call apearance

About This Document

Intended Audience

This document is written for contact center agents who use Cisco Agent Desktop on their computers.

Conventions Used

This document uses the following conventions:

Convention	Use
Bold	Highlights keys, buttons, and menu items you can select in the interface.
`Code`	Highlights file paths and code.
Italic	Highlights book titles, variables, and terms that are defined.
>	The angle bracket indicates a menu choice. For example, "choose **File > Open**" means "click the **File** menu, and then click **Open**."

Agent Desktop Feature Levels

There are three feature levels of Cisco Agent Desktop: Standard, Enhanced, and Premium. The following chart outlines the features available in each feature level. All features not listed here are present in all three feature levels.

Table 1. Cisco Agent Desktop features

Feature	Standard	Enhanced	Premium
Task buttons		×	×
Event-triggered work flows		×	×
Enterprise data thresholds		×	×
Wrapup data	×	×	×
Reason codes	×	×	×
Integrated multi-tabbed browser			×
Agent-initiated chat	×	×	×
Agent-initiated call recording		×	×
Cisco Unified Outbound Dialer		×	×
Cisco IP Communicator supported	×	×	×
Cisco Unified Mobile Agent supported	×	×	×

Cisco IP Communicator

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

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

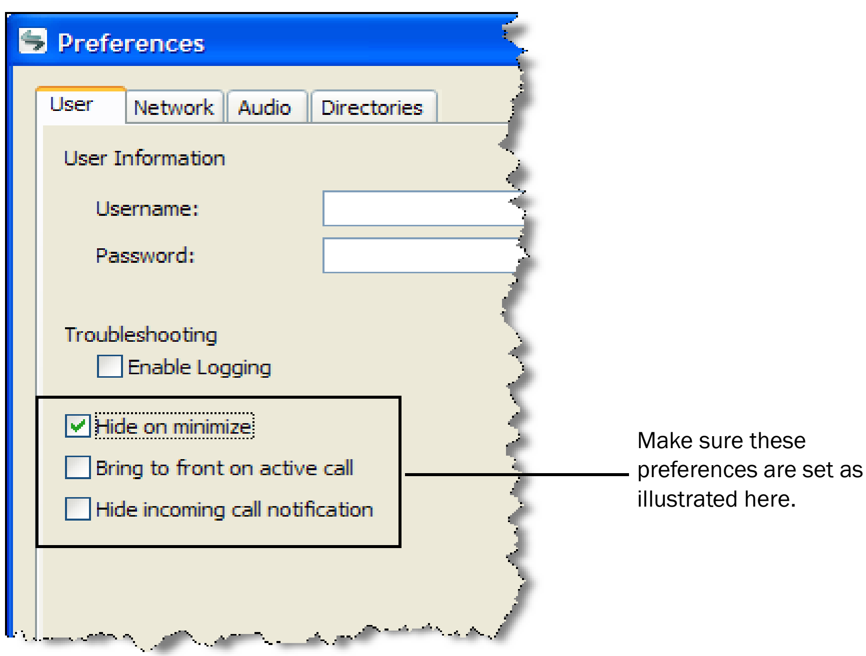
To ensure that IP Communicator does not maximize when a call is received (the default setting) you must change your preferences as outlined in the following procedure.

To make sure IP Communicator remains 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** and clear the **Bring to front on active call** and **Hide incoming call notification** check boxes.
4. Click **OK**.

Figure 1. IP Communicator Preferences (detail).



Starting Agent Desktop

You can log into Agent Desktop as a local agent or as a mobile agent. A local agent is one who is using Agent Desktop within the contact center. A mobile agent uses Cisco Unified Mobile Agent to connect to CAD via any kind of phone (including a cell phone) from outside the contact center.

Logging in as a Local Agent

To start Agent Desktop as a local agent:

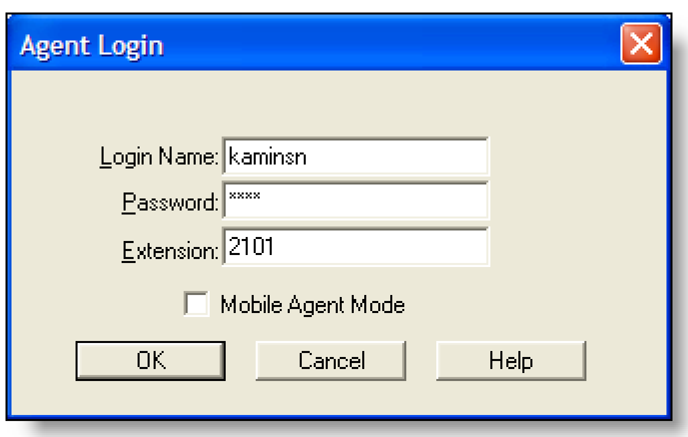
1. Choose **Start** > **Programs** > **Cisco** > **Desktop** > **Agent**.

   The Agent Login dialog box appears (see Figure 2).

   NOTE: You will be prompted for either your Login ID or Login Name in the Login dialog box. Which appears depends on how your administrator has configured the system.

   NOTE: If the login method (Login Name or Login ID) is changed while you are in the process of logging in, you will see an error message stating that the login method has changed. You must restart Agent Desktop in order to log in using the new method.

Figure 2. Agent Login dialog box



2. Enter your login ID or login name, password, and extension in the appropriate fields, and then click **OK** or press **Enter** to log in.

   - Agent Desktop remembers your login ID/login name the first time you log in. It is automatically entered the next time you log in. If you share a computer with another agent, check the Login ID/Login Name field to make sure it contains your information and not someone else's.

- If you attempt to log in and the login ID/login name (with or without the same extension used in association with it) is already in use by another agent, you will be asked if you want to forcibly log in. If you opt to do so, you will be logged in and the other agent using that ID will be logged out.
- If you attempt to log in and the extension is already in use by another agent, you will not be able to log in unless you enter a different extension.

Agent Desktop starts and is immediately minimized on the taskbar at the bottom of your Windows desktop.

Logging in as a Mobile Agent

When you log in as a mobile agent, you can use any type of phone, including a cell phone, to receive calls.

NOTE: The instructions for using your agent desktop described in this document do not address important differences that may 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.

The *Mobile Agent Guide for Cisco Unified CC Enterprise* is available on your desktop software product CD. It can also be downloaded from Cisco's website at:

www.cisco.com/en/US/products/sw/custcosw/ps1844/products_installation_and_configuration_guides_list.html

NOTE: All call control *must* be done through the Agent Desktop interface as described below. If you attempt to use your phone for call control, you might lose the customer's call. Also, use Agent Desktop 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 Call mode or Call by Call mode.

- In Nailed 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. Agent Desktop plays a phone ring sound file when a customer call arrives, and you handle all call control through Agent Desktop, 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 Agent Desktop, including disconnecting the call. When you hang up by disconnecting the call through Agent Desktop and then hanging up your physical phone, you are placed in Ready state and made available to receive another customer call.

  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.

To start Agent Desktop as a mobile agent:

1. Choose **Start** > **Programs** > **Cisco** > **Desktop** > **Agent**.

   The Agent Login dialog box appears (see Figure 2).

2. Select the **Mobile Agent Mode** check box.

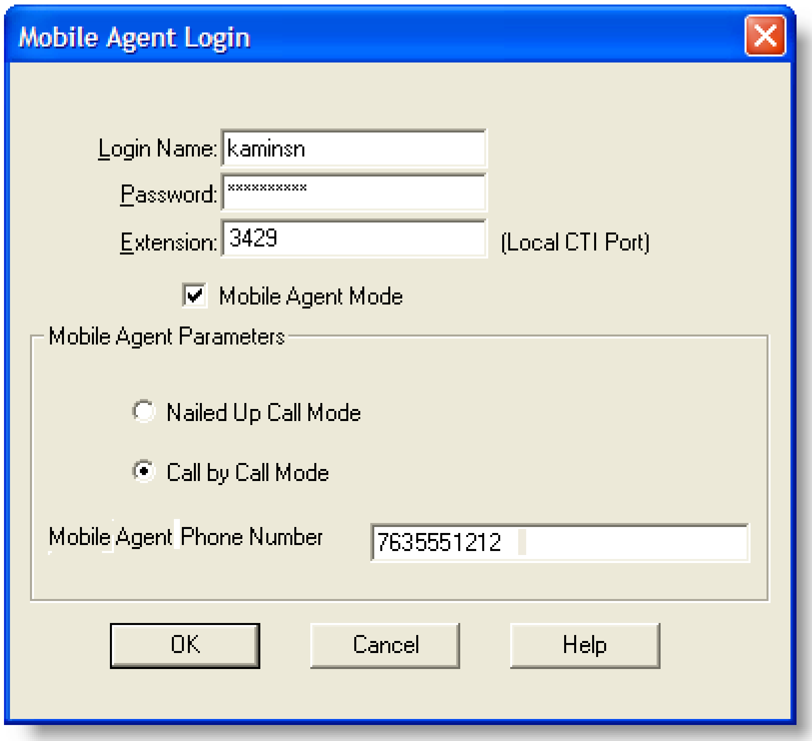
   The Mobile Agent Login dialog box appears.

3. Select the call mode you wish to use, enter the extension of the CTI port used to connect to the CAD services, and enter your phone number in the Mobile Agent Phone Number field.

   NOTE: The phone number must consist only of numbers. It cannot include any spaces, dashes, parentheses, or other non-numeric characters.

4. Click **OK** or press **Enter** to log in.

Figure 3. Mobile agent login dialog box.



Login Notes

- The Login Name field can be a maximum of 32 characters. The Login ID, Extension, and Password fields can be a maximum of 12 characters.
- Agent Desktop can control only those calls on the extension you enter in the Login dialog box, even if you are configured with multiple extensions.
- If you log in as a mobile agent using Nailed 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.
- Forced logout is not available when logging in as a mobile agent.
- 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 Desktop software licenses are in use. For this reason, it is important that you close Agent Desktop completely when you are done using it, rather than simply logging off. As long as Agent Desktop is running, one license is being used.

Access Through a Virtual Private Network

Agent Desktop is able to connect to the CAD servers through a virtual private network (VPN). This allows an agent to work remotely and still have the benefit of Agent Desktop's full functionality.

> NOTE: It is recommended that you use a VPN in order to provide a more secure connection when using Agent Desktop outside the contact center.

> NOTE: It is intended that you use IP Communicator and not a hard IP phone when running Agent Desktop behind a VPN.

The VPN connection must be established before starting Agent Desktop. If the VPN connection is lost during a sessions, you must restart Agent Desktop after the connection is reestablished.

It has been verified that Cisco VPN 3000 Concentrator and Cisco VPN Client work properly with CAD 7.2, and are supported for access. VPN solutions from other vendors may 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 CAD distributor.

Logging Out

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

To log out:

1. Change to the Not Ready agent state.
2. Click Logout on the toolbar.

   If your system is configured to require reason codes, the reason code menu appears.
3. Choose the appropriate reason code and then click OK.

   You are now logged out of the ACD.

   You can leave Agent Desktop open and log back in at any time by clicking the Login button.

   NOTE: If you want to change the extension you use when you log back in, you must restart Agent Desktop.

   If you do not intend to log back in to Agent Desktop within a short time, it is recommended that you close Agent Desktop completely when you are done using it, rather than simply logging off. As long as Agent Desktop is running, one license is being used.
4. Click Close (the X in the upper right corner of the Agent Desktop window) to close the Agent Desktop window.

Automated Updates

CAD 7.2 allows your system administrator to update all instances of Agent Desktop automatically to a newer version of CAD 7.2.

Every time you start Agent Desktop, it checks to see if there is an updated version available, or if there was a system configuration change that requires a Windows registry change. If there is, it automatically runs the update process.

> NOTE: For automated updates to function correctly, Internet Explorer must be configured so that it checks for newer versions of stored pages. In Internet Explorer, choose Tools > Internet Options and select the General tab. In the Temporary Internet Files section, click Settings and ensure that the “Every visit to the page” option is selected.

> NOTE: Automated updates are disabled for Windows Vista.

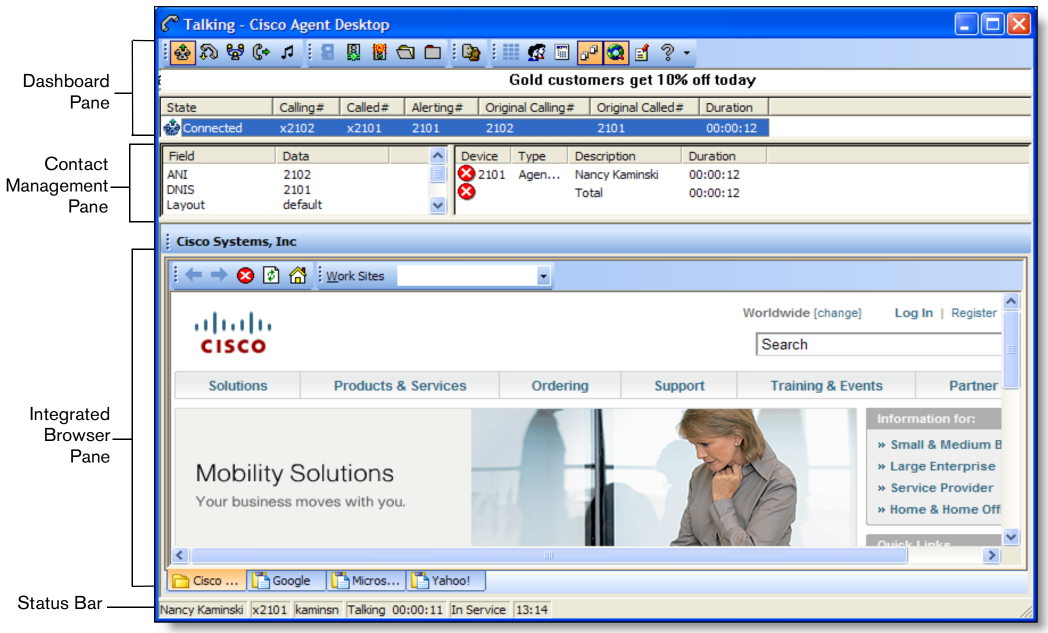
When this happens, you will see a dialog box notifying you that your copy of Agent Desktop will be updated. Click OK and then follow the instructions in the series of dialog boxes that follows.

When the update is finished, you will see a final dialog box telling you that your update is complete. After you click OK, restart Agent Desktop and log in as usual.

Agent Desktop Interface

The Agent Desktop interface displays information about active calls and allows you to perform phone functions. It also allows you to view web pages in its integrated browser pane, view agent and call statistic real-time displays, record calls (if task buttons are configured with this feature by the administrator) and “chat” with other agents and supervisors using the Chat instant messaging feature.

Figure 4. Agent Desktop interface



Accessibility

Agent Desktop has a number of features which aid accessibility by low-vision and vision-impaired users:

- Follows Windows settings for screen resolution, color/contrast settings, and font sizes
- Screen reader-compatible shortcut keys and tool tips
- Toolbar buttons available in small (16 × 16) and large (32 × 32) sizes
- Audible tones that sound when a nonagent-initiated dialog appears (for example, new chat windows and notices to the agent that a supervisor is barging in, intercepting, and recording)
- Team Messages can be configured to be non-scrolling

Interface Shortcut Keys

Shortcut keys are available to navigate the Agent Desktop interface. The shortcut keys are:

Table 2. Accessibility shortcut keys

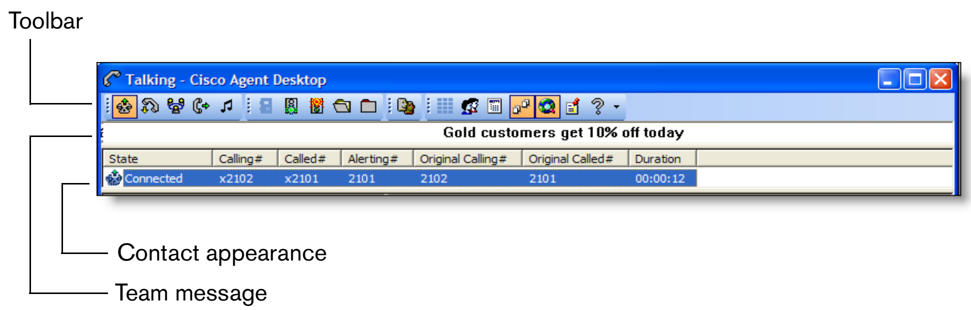
Shortcut Keys	Description
Ctrl-S	Selects the call appearance.
Ctrl-E	Selects the first entry in the Enterprise Data pane. Press Enter to open the Edit Enterprise Data dialog box for the selected entry.
Alt-P	In the Dial Pad window, selects the first entry in the Employee Phone Book.
Alt-Ctrl-E	In the Agent Real Time Displays window, selects the Real Time Displays drop-down list.
Alt-Y	In the Agent Real Time Displays window, with the Agent Call Log displayed, selects the Dates drop-down list.
Alt-Ctrl-S	In the Agent Real Time Displays window, selects the first cell in the grid control.
Ctrl-Shift-B	In the integrated browser, places your cursor in the displayed web page in the first tab position (if the page has fields you can navigate using the tab key).
Ctrl-Shift-T	In the integrated browser, cycles through all browser tabs.

Dashboard Pane

The dashboard pane provides overall control for Agent Desktop. It consists of three parts:

- Dashboard toolbar
- Team message
- Contact appearance

Figure 5. **Dashboard pane**



Dashboard Toolbar

The dashboard 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
- Initiating a chat session
- Viewing real-time displays
- Configuring the appearance of the Agent Desktop interface
- Handling Cisco Unified Outbound Dialer calls
- 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 active again.

> NOTE: If your contact center is using Enhanced or Premium Agent Desktop, your toolbar can be configured by your administrator, and may contain different buttons than those listed below.

Move your cursor over a button to view a tooltip describing its function.

Table 3. Dashboard toolbar buttons

Button	Name	Shortcut Key	Description
	Answer/Drop	Ctrl-A	Answers or drops the selected call.
	Hold/Unhold	Ctrl-H	Puts a selected call on hold or takes it off hold.
	Conference	Ctrl-F	Puts the selected call on hold and adds other parties into a conference call.
	Transfer	Ctrl-T	Puts a selected call on hold and transfers it to a third party.
	Touch Tones	Ctrl-D	Sends touch tones during an active call.
	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 are in wrapup work after terminating a call and, when finished, will be available to receive ACD calls.
	Work Not Ready	Ctrl-Z	Changes your state to Work Not Ready, indicating that you are in wrapup work after terminating a call and, when finished, will not be available to receive ACD calls.

Table 3. Dashboard toolbar buttons — *Continued*

Button	Name	Shortcut Key	Description
	Task Buttons	Alt-[button number]	Task buttons (Enhanced and Premium versions only) are configured by your administrator to perform various functions, such as stopping and starting recording, running a macro, launching an application, or sending a predefined chat message to your supervisor. There can be up to ten task buttons on the toolbar, and each button may be assigned more than one action. The buttons can be customized, so yours may be different.
	Make Call	Ctrl-M	Displays the dial pad so you can dial an outgoing call.
	Chat	Ctrl-J	Initiates a chat session with another member of your team, your supervisor, or a member of a conference call.
	Real Time Displays	Ctrl-Q	Displays the Agent Real Time Displays window, where you can view your own call logs and statistics.
	Show/Hide Contact Management	Ctrl-G	Shows or hides the contact management pane.
	Show/Hide Integrated Browser	Ctrl-B	Shows or hides the integrated browser pane.
	Preferences	Ctrl-P	Displays the Preferences dialog box, where you can set the Agent window behavior and enable/disable scrolling team messages.
	Help/About	F1 Alt-Ctrl-H	Accesses the online help. Accesses the Help/About menu.

Cisco Unified Outbound Dialer Toolbar

The optional Cisco Unified Outbound Dialer toolbar can be configured to appear in Agent Desktop by your system administrator. Depending on the dialing mode of the calling campaign the administrator sets up, the toolbar will contain some or all of the available nine buttons.

See "Unified Outbound Dialer Toolbar" on page 48 for a complete description of the toolbar.

Team Message

The team message (TM) is a scrolling or non-scrolling message sent by a supervisor to the team for a selected length of time.

You can receive a TM even when you are logged out, as long as you do not close Agent Desktop.

When there is no message, the TM section is not visible. As soon as your supervisor sends a TM, the TM section of the dashboard opens and the message scrolls across it.

Contact Appearance

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 may have one call on hold and one active call—both will be displayed.

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

The available fields are:

Table 4. Contact Appearance fields

Field	Always Visible?	Description
State	Y	The current state of the contact.
Duration	N	The length of the phone call.
Calling#	N	The number of the originating device.
Called#	N	The number of the destination device.
Alerting#	N	The number of the ringing device.
Original Called#	N	The original number called.
Original Calling#	N	The initial originating number.
Skill	N	The skill ID, displayed only if the call is an ACD call.

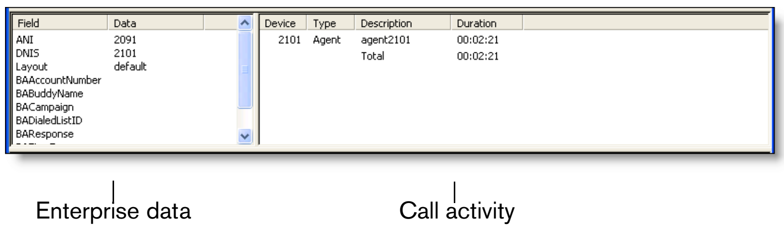
Some fields may display <unavailable> or be blank if the call information is unknown or does not exist.

Whenever the IP IVR is involved in a call, Agent Desktop displays the same information about the call in the contact appearance pane as the IP phone displays on its screen. Enterprise Data may 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 6. Contact Management pane



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

Enterprise Data

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

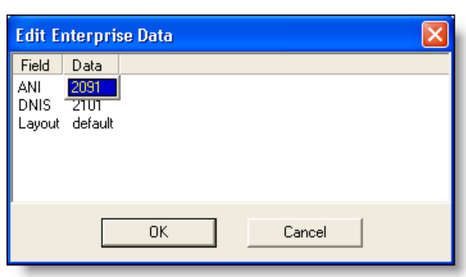
If you are set up by the administrator to be able to edit data fields, you may modify any of the data fields in the enterprise data window. The modified call data stays with the call when you transfer the call to another agent.

To modify a data field:

1. Double-click the field you wish to modify.

   The Edit Enterprise Data window appears (see Figure 7).

Figure 7. Edit Enterprise Data window with ANI field selected for editing.



2. Modify the data.
3. Click **OK**.

Call Activity

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

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.
Total	Sum of all the durations listed.

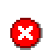
> NOTE: In some cases, a call may be on multiple devices simultaneously. For example, if a call is placed in multiple queues or is conferenced to multiple extensions, the call activity section displays the duration of the call on each individual device, and overlapping times are not indicated. In this 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 system administrator may 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 displays internet or intranet web pages to help you serve customers. The 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.

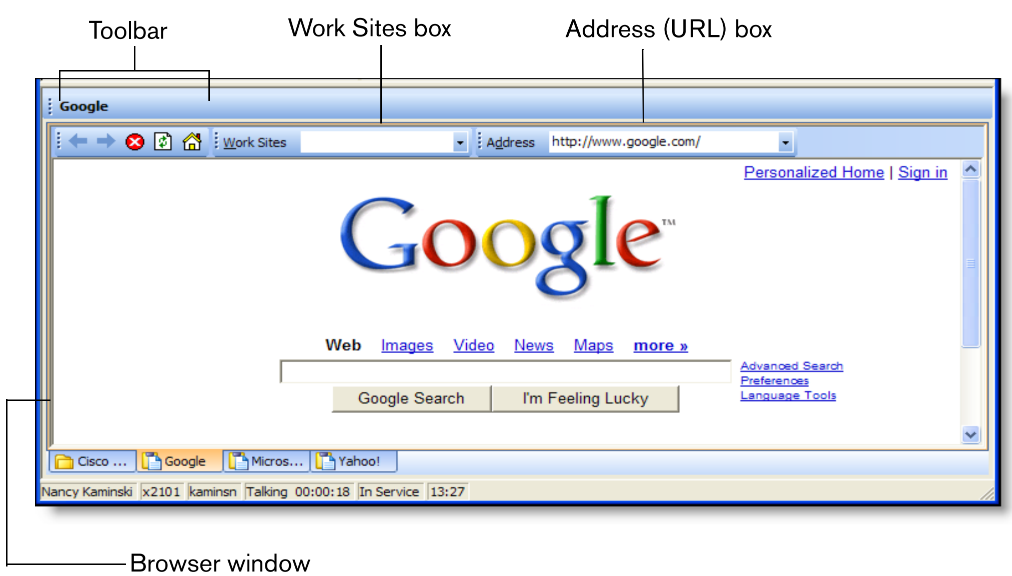
The integrated browser pane includes the:

- Integrated browser toolbar
- Work Sites box
- Address box (must be configured by the administrator to appear)
- Browser window

There can be up to 6 tabs in the integrated browser, each displaying a different web page. The first tab is reserved for pages that your supervisor pushes to you to assist you in handling calls, and the remaining up to 5 tabs for general use.

See "Using the Integrated Browser" on page 59 for information on this pane of the Agent Desktop interface.

Figure 8. Integrated Browser pane



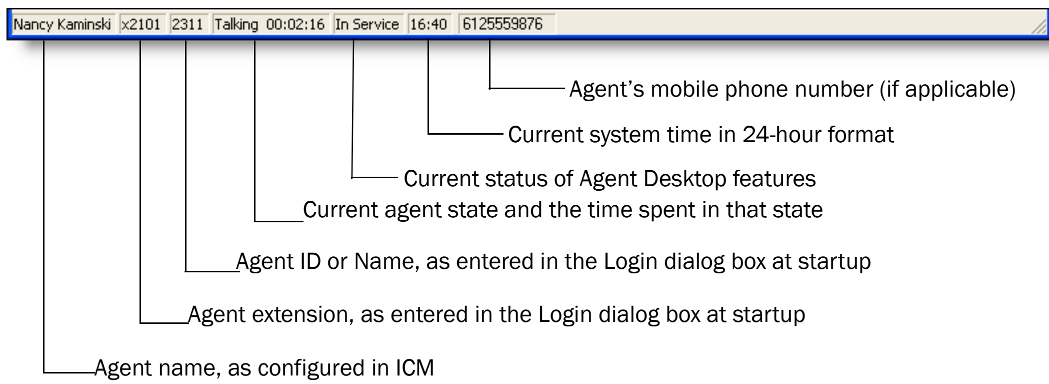
Status Bar

The status bar displays current information about Agent Desktop (see Figure 9).

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 auto-recovery, see "Service Auto-recovery" on page 64.

Figure 9. Status bar



Desktop Preferences

The Desktop Preferences dialog box enables you to configure the Agent Desktop window behavior and your accessibility options.

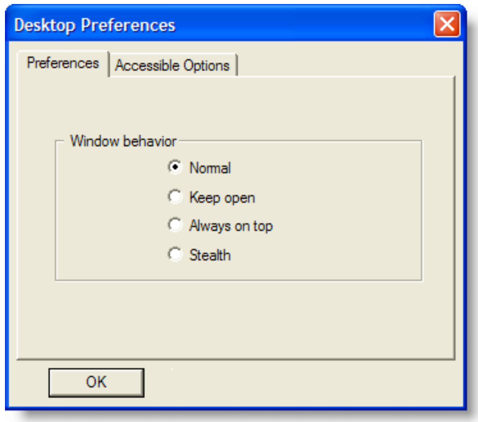
You can control the window behavior only if enabled to do so by the administrator. If the administrator has not enabled this feature, the Preferences tab is hidden. Also, if the administrator configures your toolbar so that the Preferences button is hidden, you will not be able to change any desktop preferences.

Setting the Window Behavior Mode

By default, the Agent Desktop interface is minimized when idle and opens when calls are present (Normal mode). If your administrator has enabled you to choose your window behavior mode, you can change the behavior mode using the Preferences tab in the Desktop Preferences dialog box (see Figure 10). The behavior you set will persist from session to session.

If your administrator has not enabled you to choose your window behavior mode, this tab is hidden and the window behavior is whatever the administrator selects.

Figure 10. Preferences tab.



The available modes are:

Table 6. Window behavior modes

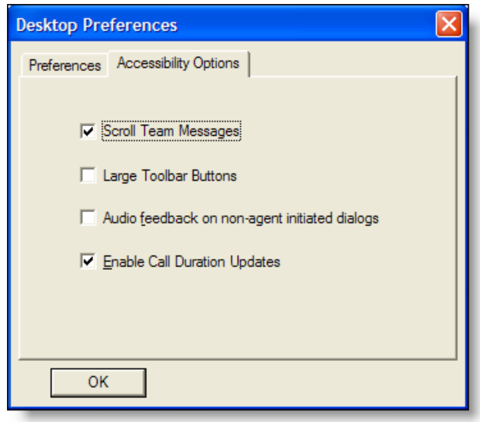
Mode	Description
Normal	Default. The window appears when calls are present and minimizes when idle.
Keep open	The window remains open when idle.
Always on top	The window remains open when idle and on top of all other open applications.
Stealth	The window appears as an icon in the system tray (lower right-hand corner of your desktop, next to the system clock) and doesn't appear unless double-clicked or if you receive a team message.

Accessibility Options

Stationary team messages. If you use a screen reader with Agent Desktop, scrolling team messages (the default mode) can be difficult to read. You can opt to turn off the scrolling feature and have stationary team messages by clearing the **Scroll team messages** check box on the Accessibility Options tab (see Figure 11).

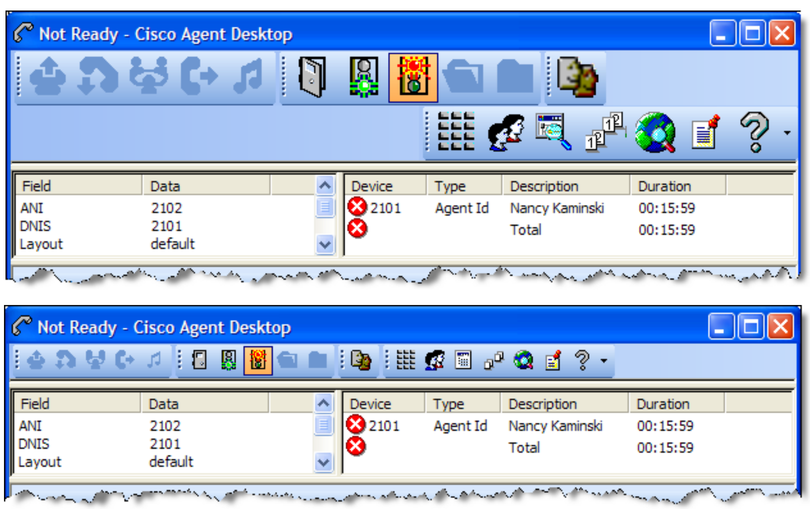
> NOTE: Your selected TM behavior will persist from session to session, and does not need to be reset each time you start Agent Desktop.

Figure 11. Accessible Options tab



Icon Size. You can change the size of the buttons on the toolbar from the default 16 × 16 pixels to 32 × 32 pixels (see Figure 12 for a comparison) by selecting the **Large Toolbar Buttons** check box.

Figure 12. Comparison of large and small toolbar buttons.



Note that the toolbar buttons wrap to multiple rows if needed.

Audio Feedback. Select the **Audio feedback on non-agent-initiated dialogs** check box to enable the sounding of a tone when a dialog initiated by someone other than you appears on your desktop. Examples of such dialogs are new chat windows and notices to you that a supervisor is barging in, intercepting, or recording your call.

Call Duration. Select the **Enable Call Duration Updates** check box to enable the Duration field to increment during a call. By default this option is enabled. A continually changing field can cause difficulties for screen readers, so agents who are visually impaired might want to disable it.

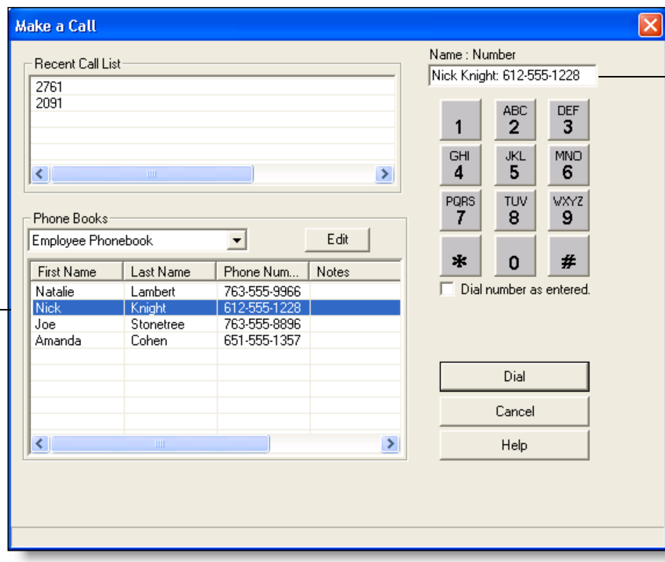
Dial Pad Window

The dial pad window allows you to make calls either by entering a phone number or selecting an existing phone number from the recent call list or from a stored phone book.

> NOTE: The dial pad window is the general name for this window. Depending on what you are doing, the window title may be Make a Call, Transfer a Call, or Conference a Call.

Figure 13. Dial Pad window

Select a name and number from a phone book or the recent call list...



...and it appears in the Name:Number field ready to be dialed.

Recent Call List

When you dial a phone number, it is automatically entered into the recent call list. This list stores up to 100 entries from newest to oldest. As the number of entries exceeds 100, the number at the bottom of the list drops off.

Agent Desktop checks to prevent duplicate phone numbers from appearing in this list. However, if the same phone number is entered twice using different formats, for instance, 555-1212 and 5551212, both numbers will appear on the list.

Phone Books

Phone books are phone number lists set up by you (your employee phone book) and the system administrator (public phone books). Click the drop-down arrow to choose the phone book you want to use.

> NOTE: The system administrator can configure Agent Desktop so that one or both types of phone books are not available.

Employee Phone Book

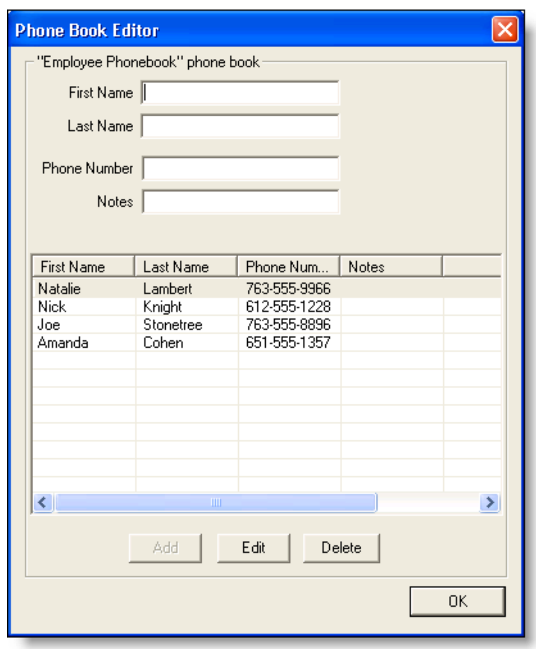
Your employee phone book is the only one you can edit. All others are controlled by the system administrator. Your phone book can have an unlimited number of entries.

To edit your employee phone book:

1. In the dial pad window, choose **Employee Phonebook** from the Phone Books drop-down list, and then click **Edit**.

   The Phone Book Editor window appears.

Figure 14. Phone Book Editor window



2. Make one of the following edits:

   - To add a new entry to the list, complete the **First Name**, **Last Name**, and **Phone Number** fields and then click **Add**. (Only the Phone Number field is required.)

The Phone Number field allows only these characters:

0–9, aA–zZ, ‘ ( ) + ; / : . = ? and a space

If you enter any other character you are advised that you used a disallowed character. The disallowed character will be replaced by a question mark so you can change it to an allowed character.

- To edit an existing entry, select it to display it in the edit fields, click Edit, and then make your changes.
- To delete an entry from the list, select it, and then click Delete.

3. When all your edits are completed, click OK.

Name: Number Field

Use this field to enter the phone number you want to dial. Entering a name is optional, but if one is entered, it must be followed by a colon and a space to separate it from the phone number, for example:

John Doe: 612-555-1212

You may enter phone numbers with or without spaces, parentheses, and dashes. Agent Desktop ignores any non-alphanumeric characters.

You may also select a phone number from the recent call list or a phone book, which is then displayed in the Name: Number field.

Depending on how the system administrator has configured the dial plan, Agent Desktop may automatically add the local access and long distance access codes to numbers you enter. Contact your system administrator for details.

Dial Number as Entered Check Box

Select the Dial Number as Entered check box to circumvent any automatic formatting (local access and long distance access codes) and dial the number exactly as you enter it in the Name: Number field.

Handling Phone Calls

You can use the Agent Desktop interface, a hard IP phone, or IP Communicator to handle calls. The following sections assume you use the Agent Desktop interface.

> NOTE: If you are a mobile agent, you must use the Agent Desktop interface only to handle calls.

Entering Phone Numbers

When dialing a phone number, you can use three different methods to enter the phone number into the dial pad's Name: Number field:

- Type the phone number on your PC keyboard
- Select the numbers from the dial pad window
- Select an existing number from the Recent Call List or a phone book

You can enter a number only, or you can enter a name and number. Use the format name: number. You must include the colon and a space to separate the name from the number.

When you enter the number, it doesn't matter whether you include dashes, parentheses, or spaces; only the numbers are read. Depending on how Agent Desktop is configured, you may not have to include the local access or long-distance access codes. Consult your system administrator for information.

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

Answering a Call

You can receive ACD and non-ACD calls through Agent Desktop. 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.

To make a call:

1. Click **Make Call**.

   The Make a Call window appears.

2. Enter a number in the Name: 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 and make a call to a busy phone, you will not hear a busy tone. You will hear either silence or on-hold music. However, the contact appearance pane displays the Busy state, as shown below.

Entering Touch Tones During a Call

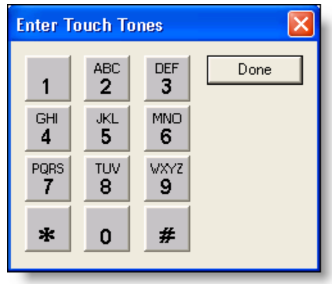
If you need to send touch tones during a call (for instance, if you are prompted to enter an account number) you can do so using the Touch Tones button on the toolbar. This button activates a number pad on which you enter the required numbers.

To enter touch tones:

1. When prompted to enter numbers during a call, click **Touch Tone**.

   The number pad appears (see Figure 15).

Figure 15. The touch tone number pad.



2. Enter the required numbers and/or symbols, and then click **Done**.

   The number pad closes and you are returned to the Agent Desktop interface.

Entering Touch Tones During a Consultative Call

You can send touch tones during a consultative call (transferring or conferencing).

To enter touch tones during a consultative call:

1. During a call, click the **Transfer** or **Conference** button.

   The Transferring Call window or Conferencing window appears.

2. Select the **Touch Tones** check box, and then enter the required number and/or symbols on the number pad.

   The number pad generates DTMF tones.

3. Clear the **Touch Tones** check box.

   The touch tones function is disabled.

   NOTE: The Touch Tones check box is automatically cleared when you close the Transferring Call or Conferencing window.

Transferring a Call

There are two types of transfer calls:

- **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.
- **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 can't confirm if the third party is ready to accept the call.

To transfer a call:

1. With a call active, click **Transfer**.

The Transferring Call window appears.

2. Enter the phone number to which you are transferring the call in the Name: Number field.
3. Click Dial.

   When the phone rings, the Dial button changes to the Transfer button.
4. Take one of the following actions:
   - For a supervised transfer, wait for the third person to answer the phone, announce the transfer, then click Transfer.
   - For a blind transfer, click Transfer without waiting for the third person to pick up the phone.

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:

- 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.
- Blind conference. In a blind conference, you add the third party to the conference without speaking to him or her.

NOTE: If you use a blind conference to add someone to your call, you may or may not see the call tagged as a conference call in the dashboard pane.

To make a conference call:

1. With a call active, click Conference.

   The Conferencing window appears.
2. Enter the phone number of the person you want to add to the call in the Name: Number field.
3. Click Dial.

   When the phone rings, the Dial button changes to the Add to Conf. button.
4. Take one of the following actions:
   - For a supervised conference, wait for the third person to answer the phone, announce the conference, then click Add to Conf.
   - For a blind conference, click Add to Conf. without waiting for the third person to pick up the phone.

The Conferencing window closes.

5. To add one or more people to the conference call, repeat Steps 1 to 4 for each person.

   NOTE: The total number of conference call participants on a call is determined by settings on the Cisco CallManager. Ask you supervisor for the total number configured for your contact center.

   NOTE: Only the person who originated the conference call can add another participant to the conference call.

Alternating Between Calls

The Alternate function allows you to switch between two parties before transferring a call or adding a call to a conference.

Alternating Before Transferring a Call

The Alternate function allows you to talk to Party A and Party B separately before completing the transfer of Party A to Party B.

To alternate between calls before transferring:

1. While on a call, click Transfer.

   The Transferring Call window appears.

2. Enter the phone number to which you are transferring the call in the Name: Number field, and then click Dial.

   When the phone rings, the Dial button changes to the Transfer button. Wait for Party B to answer the phone.

3. Click Alternate to speak to Party A, and then click Alternate again to speak to Party B.

   You may continue clicking Alternate to switch between Party A and Party B. When you speak to one party, the other party is put on hold.

4. Click Transfer.

   Party A is transferred to Party B and you are disconnected from the call.

Alternating Before Adding a Call to a Conference

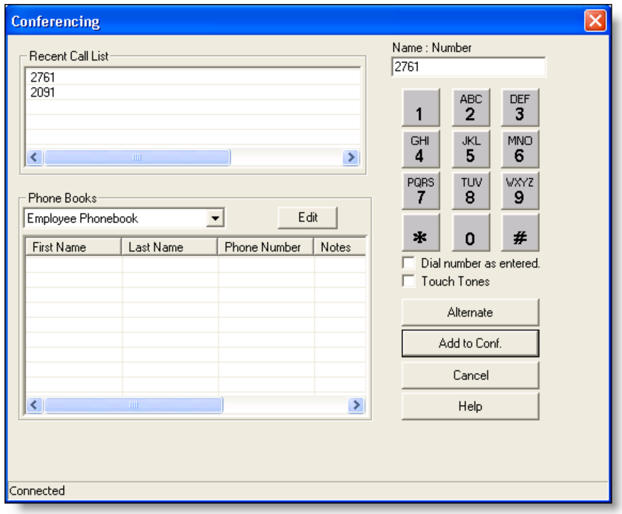
The Alternate function also allows you to talk to a conference call and Party B separately before adding Party B to the conference call.

To alternate between a conference call and another party:

1. While on a call, click Conference.

The Conferencing window appears (see Figure 16) and the active call is put on hold.

Figure 16. Alternating in a conference call.



2. Enter the phone number of the person you want to add to the conference call in the **Name: Number** field, and then click **Dial.**

   When the phone rings, the Dial button changes to the Add to Conf. button. Wait for Party B to answer the phone.

3. Click **Alternate** to speak to the conference, and then click **Alternate** again to speak to Party B.

   You may continue clicking Alternate to switch between the conference and Party B. When you speak to one party, the other party is on hold.

4. Click **Add to Conf.**

   Party B is added to the conference call.

Supervisor Involvement

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

- By intervening in the customer call
- 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 later review

You are notified when your supervisor barges in or intercepts your phone call by the appearance of a popup window. You may or may 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.

The pushed web page is always displayed in the first tab in your integrated browser. Whenever the supervisor pushes a page to you, the tab will blink to attract your attention.

Agent States

Agent Desktop 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. Your current state is displayed on the status bar.

Available agent states are:

Table 7. 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 or Unified Outbound Dialer 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).

Table 7. Agent states — *Continued*

State	Description
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 wrapup 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 wrapup data
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 wrapup 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 wrapup data

Using Chat

Chat enables you to send instant messages to other agents on your team and to your supervisors. You can initiate a chat session by clicking Chat on the dashboard toolbar.

NOTE: You cannot chat with agents who use Cisco Agent Desktop—Browser Edition (CAD-BE).

NOTE: If you don't have the Chat button on your toolbar, then the administrator has configured Agent Desktop so that you cannot initiate a chat session. However, you are still able to receive incoming chat sessions and respond to them.

Some Chat features are:

- Each chat session is between you and one other party.
- You can participate in multiple concurrent chat sessions.
- The Chat Session window's title bar displays the name of the person with whom you are chatting.
- High priority chat messages pop on your screen so they are immediately noticed, while normal priority chat messages are minimized and flash on your Windows task bar.
- Chat history (a log of the chat messages sent between you and your chat partner) is available as long as the Chat Session window is open. Once you close the window, the log is lost.
- Chat history is in chronological order, with the oldest messages at the top of the log pane.
- You can send and receive chat messages even if you are logged out of the ACD, as long as Agent Desktop remains open.

To chat with someone else:

1. On the dashboard toolbar, click **Chat**.

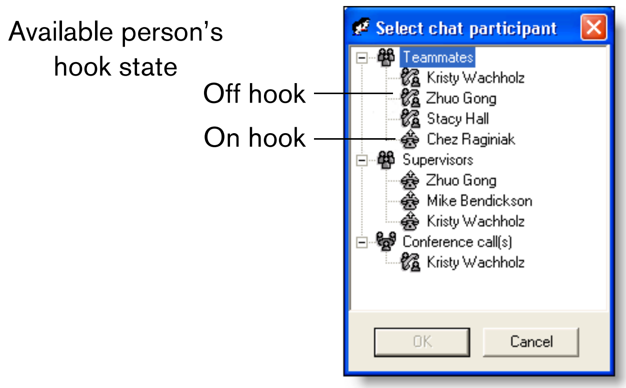
   The Chat Selection window is displayed (see Figure 17).

   NOTE: The Chat Selection window is a snapshot—it displays the status of the people with whom you can chat only at the time you clicked the Chat button, and does not refresh those statuses while you have the window open.

   The window lists the people with whom you can chat: supervisors, agents on your team, and participants in any conference call you are on.

An icon next to the name shows that person's hook state at the time you clicked the Chat button.

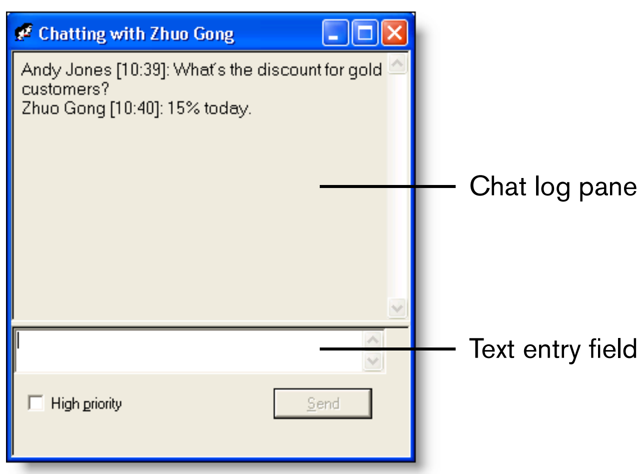
Figure 17. Chat Selection window



2. Double-click the name of the person with whom you wish to chat.

   A Chat Session window is displayed and a chat session is initiated with the selected person (see Figure 18).

Figure 18. Chat Session window



3. Type your message in the text entry field.
4. If you want your message to be noticed immediately by popping on the recipient's screen, check the **High priority** checkbox.
5. Click **Send** or press **Enter**.

   Your message is sent to your chat partner and logged in the chat log pane.

To terminate a chat session:

- Click Close in the upper right-hand corner of the Chat Session window.

High-Priority Chat Message Task Button

You may 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 system administrator (for instance, “Please barge in to my call”). It appears in a Chat Session window that pops up on your supervisor’s desktop. It behaves just like a chat message you send that is tagged as a high priority message.

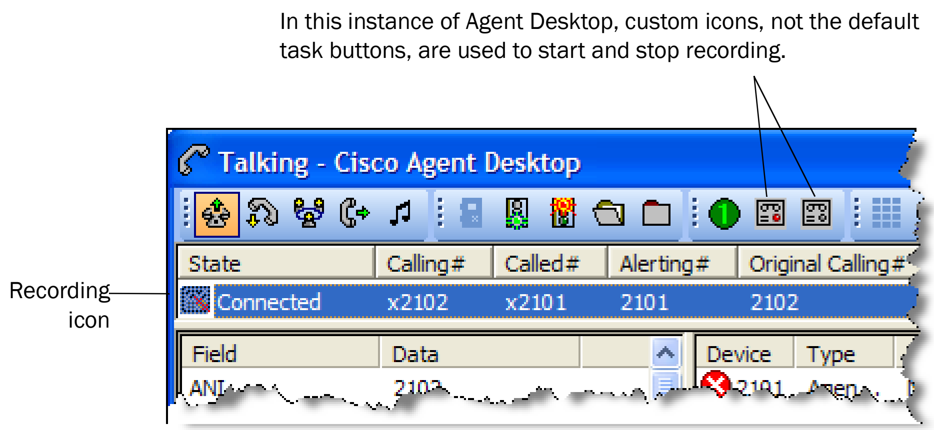
Using Recording

You can record calls if you are set up to do so by your administrator and if you are using the Enhanced or Premium version of Agent Desktop. The administrator customizes your toolbar with two task buttons: one starts recording and the other stops recording.

> NOTE: The default task buttons are green circles with numbers inside them, like this: . Using them on the Agent Desktop toolbar is optional. Your administrator may choose to use other buttons for the recording function.

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 (see Figure 19).

Figure 19. Recording a call.



When recording a call, keep in mind the following:

- The recording starts when you are connected to a customer call and you click the **Start Recording** button.
- The recording ends automatically when the call terminates, or when you click the **Stop Recording** button, 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.

Cisco Unified Outbound Dialer

If configured by your system administrator, your copy of Agent Desktop may include the Cisco Unified Outbound Dialer toolbar. The buttons that appear on the toolbar are determined by the type of dialing campaign set up by your administrator:

- Progressive. In Progressive dialing mode, a fixed number of outbound lines are dialed per agent available.
- Predictive. In Predictive dialing mode, a mathematical algorithm determines how many outbound lines to dial for each available agent. This algorithm varies over time based on conditions in the contact center.
- Preview. In Preview dialing mode, customer information is presented on your desktop before the customer call is transferred to you. You have the option to accept, reject, or skip the proposed call.
- Direct Preview. In Direct Preview dialing mode, a call is ready to be dialed by the Dialer and customer information is displayed on your desktop. When you click Accept, the call is actually dialed and you are connected to the customer without any time lag.

NOTE: Cisco Unified Mobile Agent call-by-call mode does not support Unified Outbound Dialer. Nailed mode does support Unified Outbound Dialer.

Unified Outbound Dialer Toolbar

Table 8 displays the Unified Outbound Dialer toolbar buttons, and describes their function and which dialing mode they are used with.

Table 8. Unified Outbound Dialer toolbar buttons and their functions

Button and Shortcut Key	DPrev	Pred	Prev	Prog
 Accept (Alt-Shift-A) The system dials the customer and transfers the call to you.	×		×	
 Reject (Alt-Shift-R) The system rejects the current call and releases you from the outbound calling reservation. At this point, the system may deliver to you another outbound call or a new inbound call.	×		×	

Table 8. Unified Outbound Dialer toolbar buttons and their functions — *Continued*

Button and Shortcut Key	DPrev	Pred	Prev	Prog
Reject Close (Alt-Shift-U) The system rejects the current call and closes the record so it will not be called again.	×		×	
Skip (Alt-Shift-S) The system skips the current call and presents you with another customer call.	×		×	
Skip Close (Alt-Shift-T) The system skips the current call and closes the record so it will not be called again.	×		×	
Skip-Next (Alt-Shift-K) The system skips the call and displays a menu of these options: • Wrong Number (Alt-Shift-W): the agent is informed that the number called is a wrong number. After the call terminates, the system calls other customer phone numbers • Not Home (Alt-Shift-N): the agent is informed that the customer is not home. After the call terminates, the system calls other customer phone numbers	×	×	×	×
Callback (Alt-Shift-C) Displays the Callback Properties dialog box (see Figure 21 on page 51). This dialog box enables you to set a date and time to call back the customer. Callback is enabled only if you are in a talking or wrapup state on an Unified Outbound Dialer call.	×	×	×	×

Table 8. Unified Outbound Dialer toolbar buttons and their functions — *Continued*

Button and Shortcut Key	DPrev	Pred	Prev	Prog
 Reclassify (Alt-Shift-Q) Displays a menu that enables you to reclassify a customer phone number as: • Voice (Alt-Shift-V) • Answering Machine (Alt-Shift-M) • Fax/Modem (Alt-Shift-F) • Invalid Number (Alt-Shift-I)	×			
 Cancel Reservation (Alt-Shift-D) The system releases you from the calling campaign and places you in the Not Ready state. To resume participating in the calling campaign, you must change your state to Ready.	×	×	×	×

Key

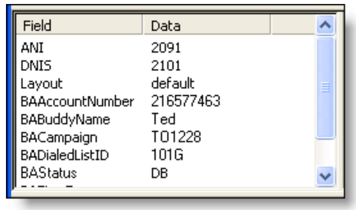
DPrev = Direct Preview
Pred = Predictive
Prev = Preview
Prog = Progressive

Information about Unified Outbound Dialer calls is displayed in the Enterprise Data pane (see Figure 20). Unified Outbound Dialer data field names are prefixed with "BA".

NOTE: If a call is part of a Preview dialing mode campaign, the first letter in the BAStatus field entry is a P. If a call is part of a Direct Preview dialing mode campaign, the first letter in the BAStatus field entry is a D.

NOTE: If a call is part of a Progressive or Predictive dialing mode campaign, no Unified Outbound Dialer enterprise data (fields prefixed with "BA") is available until you are connected to the customer.

Figure 20. Enterprise Data pane with Unified Outbound Dialer data displayed.



Customer Callback

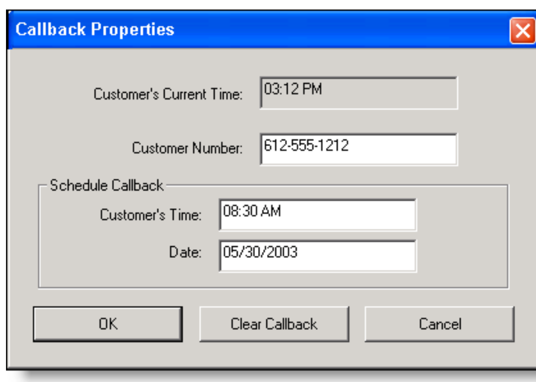
You can schedule a customer callback in any Unified Outbound Dialer dialing mode.

To schedule a customer callback:

1. While in Talking or Wrapup state, click Callback.

   The Callback Properties dialog box appears, displaying data about the current customer call (see Figure 21).

Figure 21. Callback Properties dialog box.



2. In the Schedule Callback section, enter a time (HH:MM) and date (MM/DD/YYYY) to call back the customer.

   Be sure that the time you enter in the Customer's Time field is the time in the customer's location, not the time in your location. You can enter the time in 12- or 24-hour format. If using the 12-hour format, you must enter AM or PM as well.

   You can also change the customer number if the customer wants to be contacted at a different phone number.

   NOTE: In Preview, Progressive, and Predictive modes, the number displayed in the Customer Number field is the dialer port, not the customer's phone number.

3. Click **OK**.

   The call is now scheduled for callback at the time and date you set.

   NOTE: The customer callback might not be made exactly at the time you specified if the clock on the computer hosting the ICM is set at a different time than the clock on your PC.

You can cancel a scheduled customer callback as long as you are still on the customer call (in Talking state) or in Wrapup state after that call.

To cancel a scheduled customer callback:

1. While in Talking or Wrapup state, click **Callback**.

   The Callback Properties dialog box appears, displaying data about the current customer call.

2. Click **Clear Callback**.

   The scheduled callback call is now cancelled.

Agent Real Time Displays

There are several real-time displays you can view in the Agent Real Time Displays window. These displays are:

- Agent Call Log Display
- Agent ACD State Log Display
- Agent Detail Display
- Skills Statistics Display

You can sort displays by any of the columns in ascending or descending order by clicking on the column header.

To view a real time display:

1. On the dashboard toolbar, click Real Time Displays.

   The Agent Real Time Displays window is displayed.

2. From the Real Time Displays field, select the display you want to view.

   The selected display appears. You can update the information by clicking the Refresh button.

Display Status

Every real-time display window has a status bar at the bottom. The status bar shows the current status of the display, either *Active* or *Inactive*.

Active means that the data in the display is current and being updated at specified refresh intervals. *Inactive* means that the data is not being updated because the service that generates it has failed and new data is no longer being received.

If you click away from and then return to an inactive display or click the Refresh button, the display will be blank. Once the service recovers, the latest data is shown in the display and the status is changed from Inactive to Active.

All real-time displays are always available, regardless of whether the associated service is functioning or not.

Agent Call Log Display

The Agent Call Log Display (see Figure 22) shows a record of calls made and received over the last seven days, by day.

Figure 22. **Agent Call Log display.**

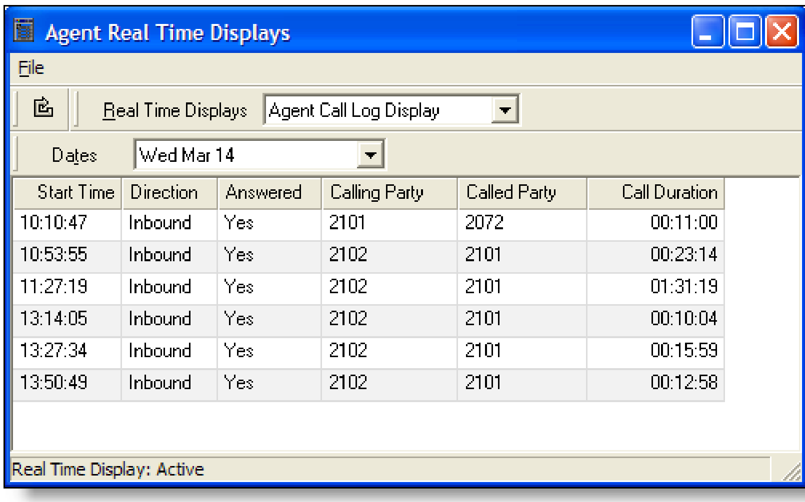


Table 9. **Agent Call Log fields**

Field	Description
Start Time	The time the call started. Start time is based on the time the Recording & Statistics service receives the state data from Agent Desktop, therefore the start time reflects the Recording & Statistics server time, not the time shown on your PC. If the Recording & Statistics server and the agent PC are in different time zones, this is taken into account.
Direction	Inbound or outbound call.
Answered	Yes/No. Was the call answered?
Calling Party	The number of the phone that made the call.
Called Party	The number of the phone that received the call.
Call Duration	The length of the call. For inbound calls, call duration = ring time + talk time + hold time. For outbound calls, call duration = dialtone + ringback + talk time + hold time.

Agent ACD State Log Display

The Agent ACD State Log Display (see Figure 23) shows a record of all ACD server state transitions for the current day. The log is in chronological order.

Figure 23. Agent ACD State Log display.

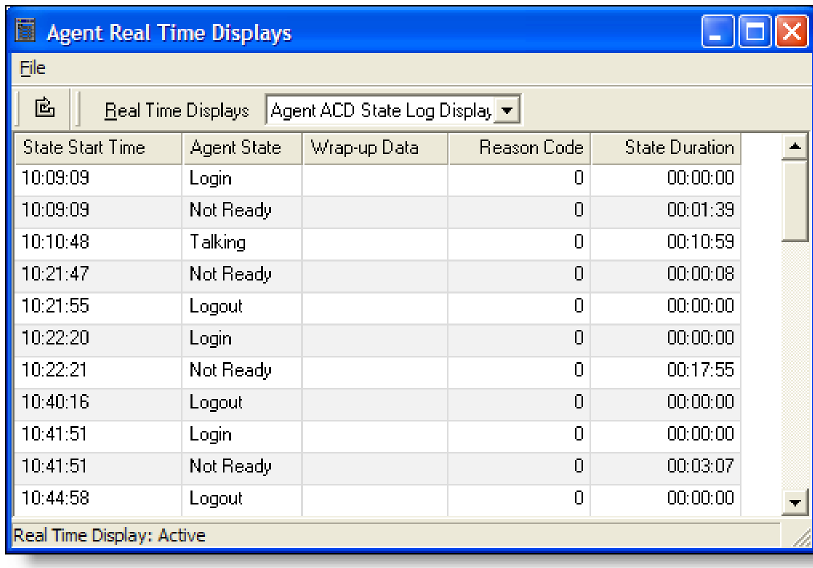


Table 10. Agent State Log fields

Field	Description
State Start Time	The time the ACD agent state was initiated. Start time is based on the time the Recording & Statistics service received the ACD agent state data from Agent Desktop; therefore the start time reflects the Recording & Statistics server time, not the time shown on your PC. If the Recording & Statistics server and the agent PC are in different time zones, this is taken into account.
Agent State	The last ACD agent state written to the log is actually the previous ACD state that you were in. In order to calculate State Duration, the current state cannot be written to the log until you transition to the next ACD agent state.

Table 10. Agent State Log fields

Field	Description
Wrap-up Data	Any wrapup data you entered, if the agent state you transition to is Work Ready or Work Not Ready.
Reason Code	A number followed by a string description in parentheses identifying why the agent is in the current state. Displays 0 (zero) if there is no reason code. This field only applies to the Not Ready and Logout states.
State Duration	The amount of time you spend in the agent state.

Agent Detail Real Time Display

The Agent Detail Real Time Display (see Figure 24) shows your performance statistics for the current day. This information is refreshed automatically every 10 seconds.

Figure 24. Agent Detail Real Time Display

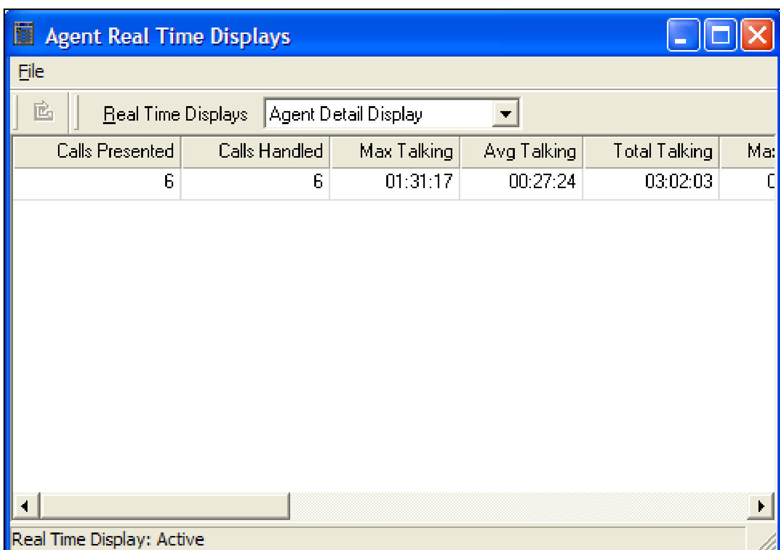


Table 11. Agent Detail Real Time Display fields

Field	Description
Calls Presented	The number of inbound calls (ACD or non-ACD) that are delivered to your extension (causes your phone to ring).
Calls Handled	The number of inbound calls (ACD or non-ACD) that are answered at your extension.
Max Talking	The length of the longest call (talk time + hold time).
Avg Talking	The total time on calls (all talk time + all hold time) divided by the number of calls.
Total Talking	The total time on calls (all talk time + all hold time).
Max Ready	The longest time spent in the Ready state.
Avg Ready	The total time spent in the Ready state divided by the number of times spent in the Ready state.
Total Ready	The total time spent in the Ready state.
Max Not Ready	The longest time spent in the Not Ready state.
Avg Not Ready	The total time spent in the Not Ready state divided by the number of times spent in the Not Ready state.
Total Not Ready	The total time spent in the Not Ready state.
Max After Call Work	The longest time spent in the Work Ready or Work Not Ready state.
Avg After Call Work	The total time spent in the Work Ready or Work Not Ready states divided by the number of times spent in those states.
Total After Call Work	The total time spent in the Work Ready or Work Not Ready state.

Skills Statistics Real Time Display

The Skills Statistics Real Time Display (see Figure 25) shows information about skill groups and the resources available to answer calls that are routed to them. This information is refreshed automatically every 30 seconds.

Figure 25. Skills Statistics Real Time Display.

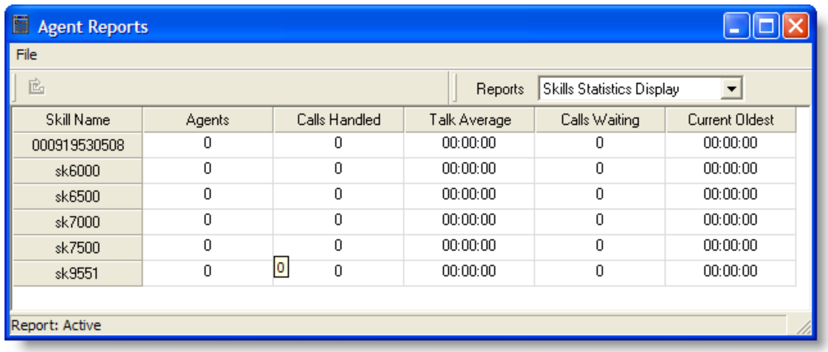


Table 12. Skills Statistics Real Time Display fields

Field	Description
Skill Name	Name/ID of the skill group. NOTE: Due to the way ICM works, an ICM-generated default skill group will be displayed in the report. This skill group's name is usually a long string of numbers. For example, in Figure 25, it is 000919530508. No agents are assigned to this skill group, and it can safely be ignored.
Agents	Number of agents currently logged on to the skill group.
Calls Handled	Number of inbound ACD calls handled by agents in the skill group.
Talk Average	Average talk time for inbound ACD calls counted as handled by agents in the skill group.
Calls Waiting	Number of calls currently queued to the skill group.
Current Oldest	Duration of the oldest call in the queue.

Using the Integrated Browser

The integrated browser feature is available in the Premium version of Agent Desktop. It allows you to view intranet and internet web pages from within Agent Desktop. The browser window can display up to 6 tabs, each containing a different web page. The first tab is always reserved for any web pages your supervisor pushes to you.

> NOTE: You must have Internet Explorer 6 or 7 installed on your PC for the integrated browser to function.

> NOTE: Internet Explorer 7’s tabbed browsing feature does not function in the CAD integrated browser.

You can click Show/Hide Integrated Browser on the dashboard toolbar to show or hide this section of the Agent Desktop window.

The system administrator can configure specific web pages to display in each browser tab. If the administrator does not do this, the tab is blank.

If set up by your system administrator as part of a work flow, Agent Desktop can use call enterprise data to interact with a web application, such as a customer database, and display customer information in the integrated browser.

Browser Toolbar

The browser toolbar is the basic Internet Explorer toolbar. It allows you to navigate among web pages you view, refresh a current page, and return to your home page.

Table 13. Browser toolbar buttons

Button	Name	Shortcut Key	Description
	Back	Alt–left arrow	Returns you to the last page you viewed.
	Forward	Alt–right arrow	Takes you to the page you viewed before you clicked the Back button.
	Stop	Esc	Stops the browser from displaying a web page (for example, if the download is taking too long).
	Refresh	F5	Refreshes the web page displayed to ensure you see the latest content.
	Home	Alt–Home	Returns you to your predefined home page.

Accessing Work Sites

The system 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

The system 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.

> NOTE: The first tab, which is reserved for web pages the supervisor pushes to you, never has an Address field on it. It can appear only on the other tabs.

If you access a website that uses popup windows, those popups will create new browser tabs. You can add up to 15 browser tabs for these popup windows even though the CAD integrated browser is limited to a maximum of 6 tabs.

The popup window browser tabs can be closed by clicking the Close button in the upper right corner of the tab. If you access enough popup windows to exceed the maximum of 15, the additional popups will use the default browser.

To access a website using the Address field:

- Enter the website’s address (URL) in the Address field, and then press Enter.

Dialing Hyperlinked Phone Numbers

You can dial a phone number displayed as a hyperlink on a web page merely by clicking it.

- The phone number must be 10 digits long and use the North American dial string format:

  (3-digit area code)(3-digit exchange number)(4-digit subscriber number)

  Shorter numbers, such as local numbers without area codes or phone extensions, cannot be dialed.
- The phone number can have parentheses around the area code, and use any combination of space, hyphen, and period in the phone number.
- The phone number cannot contain alpha characters. For instance, the phone number 800-GET-PZZA cannot be dialed.
- You can dial a hyperlinked phone number only if your are in the Not Ready agent state.

- A dialed hyperlinked phone number will not appear in the Recent Call List in the Dial Pad window.
- The phone number hyperlinks disappear if you refresh the site by right-clicking and choosing the Refresh menu option. To refresh the page without losing the hyperlinks, press F5 or click the Refresh button on the integrated browser toolbar.

Supervisor Intervention

Your supervisor can “push” a web page to your browser. See "Browser Involvement" on page 41 for details.

Reason Codes

Agent Desktop can be configured by the system administrator so that you are required to enter reason codes.

Reason codes describe why you have transitioned to the Not Ready or Logout agent state. These codes are set up by your system administrator and are customized for your contact center.

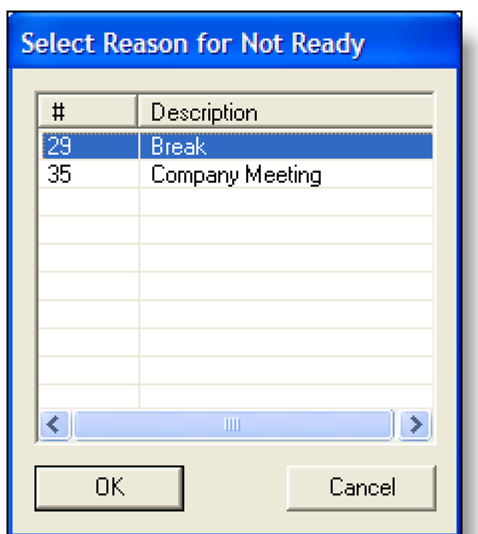
Whenever you initiate a transition to the Not Ready or Logout state, or such a transition is included in a work flow, a popup dialog box appears (see Figure 26). You must select the appropriate code from that dialog box and click OK in order to make the transition.

You can sort the reason codes by number or description by clicking the appropriate column header.

There are several situations in which you will not see the Reason Code dialog box:

- Your supervisor initiates the transition (a reason code indicating that the supervisor forced the agent state change is automatically selected)
- The agent state change is part of a work flow in which automated reason codes are enabled

Figure 26. Reason Code dialog box



Wrap-up Data

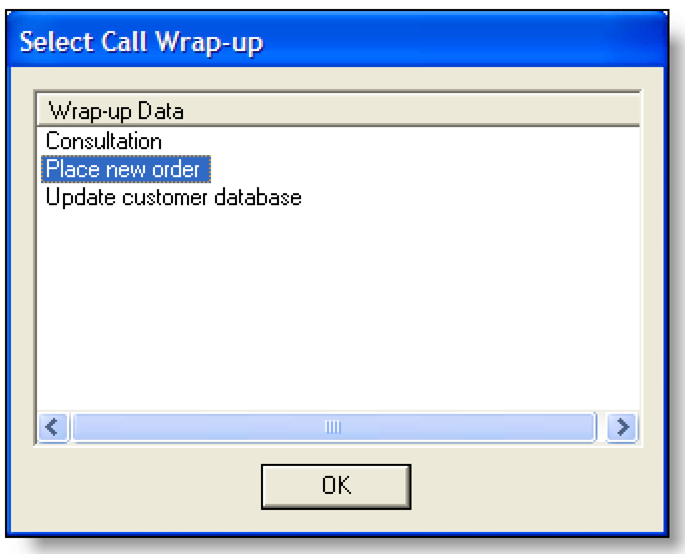
Agent Desktop can be configured by the system administrator so that you are required to enter wrapup data.

Contact centers use wrapup data for purposes such as tracking the frequency of different activities or identifying the account to which to charge a call, among others. Like reason codes, wrap-up data descriptions are set up by your system administrator to reflect the needs of your contact center.

If you transition to the Work Ready or Work Not Ready state immediately after ending a call (you clicked the Work Ready or Work Not Ready button during the call), the Select Call Wrap-up dialog box appears (see Figure 27). Select the appropriate description that sums up the call outcome and click **OK** to continue.

You can sort the wrap-up data descriptions by clicking the column header.

Figure 27. Select Call Wrap-up dialog box.



Service Auto-recovery

The service auto-recovery feature allows Agent Desktop to automatically recover its connection to the CAD services in the event of a service restart or a network outage.

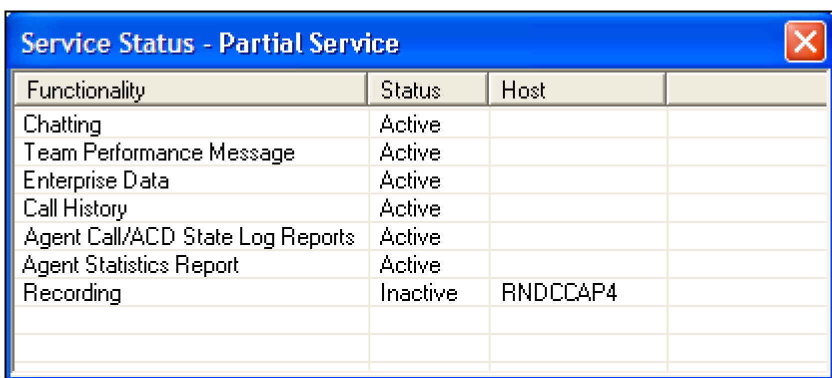
When Agent Desktop detects that it is unable to communicate with a service (generally within three minutes of the service failure), the status bar displays “Partial Service” or “No Service” to indicate some or all of the services have failed.

When Agent Desktop 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.

> NOTE: When the CallManager fails, you are logged out of Agent Desktop. You must manually log back in after the CallManager recovers; login is not automatic.

To learn more about what is affected by the service failure, double-click the status message on the status bar. Agent Desktop displays a popup box that lists Agent Desktop features and indicates if that feature is available or not due to the service outage (See Figure 28).

Figure 28. Service Status popup window



Service Status - Partial Service

Functionality	Status	Host	
Chatting	Active		
Team Performance Message	Active		
Enterprise Data	Active		
Call History	Active		
Agent Call/ACD State Log Reports	Active		
Agent Statistics Report	Active		
Recording	Inactive	RNDCCAP4	

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