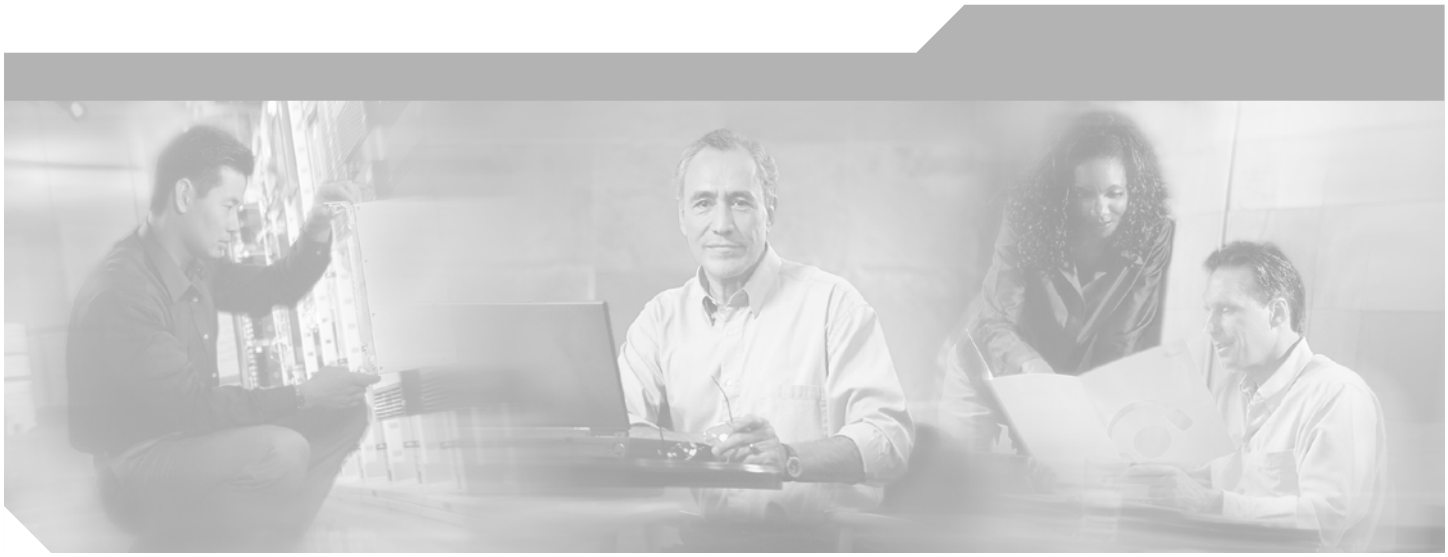

Cisco Desktop Administrator User's Guide

Cisco Desktop Product Suite 4.3 (ICD)

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Introduction to Cisco Desktop Administrator

1

Introduction

Cisco Desktop Administrator is a “container” program. It allows you to access various other applications used to administer Cisco Agent Desktop and Cisco Supervisor Desktop from within one interface.

> **NOTE:** Desktop Administrator does not support Agent Desktop and Supervisor Desktop if the users of those applications are on a virtual private network (VPN).

Desktop Administrator Versions

Desktop Administrator is available in two versions: Standard and Enhanced.

- Enhanced Desktop Administrator includes all the functions described in this manual.
- Standard Desktop Administrator does not allow you to customize the Agent Desktop interface or to automate work flows.

About This Document

Intended Audience

This document is written for contact center system administrators who use Cisco Desktop Administrator.

Conventions

In this document, terminology and typographic conventions are as follows:

Terminology

- The word *enter* means to press the sequence of keys specified. For example, an instruction to enter the letter "y" is shown as

  Enter **y** to continue.

- The word *click* means to use your mouse to execute the action represented by a button. For example, an instruction to click the Next button is shown as

  Click **Next**.

- The words *check* and *uncheck* mean to activate or deactivate a check box. For example, an instruction to deactivate the Dial Number as Entered check box is shown as

  Uncheck the **Dial Number as Entered** check box.

- The word *choose* means to pick an option from a menu or submenu. For example, an instruction to choose the Desktop option from a series of submenus is shown as

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

- The word *select* means to mark text or other elements to be copied or cut. For example, an instruction to select text is shown as

  Select an entry from the list to edit.

- Simultaneous keystrokes (as when you hold down the first key, then press the second and third keys) are represented as a series of bolded key names joined by hyphens. For example, an instruction to press and hold the Alt key while pressing the letter "d" is shown as

  Press **Alt-d**

- Function keys are represented by the letter F followed by the function key number. For example, an instruction to press function key 3 is shown as

  Press **F3**.

Typography

- Commands and text you type, and the names of windows, buttons, menus, and menu options appear in bold type:

  From the **Options** menu, choose **Local Admin**.

- Variables you must enter appear in italics:

  http://*servername*/appadmin

- Terms that are being defined appear in italics:

  Actions are commands that perform a task.

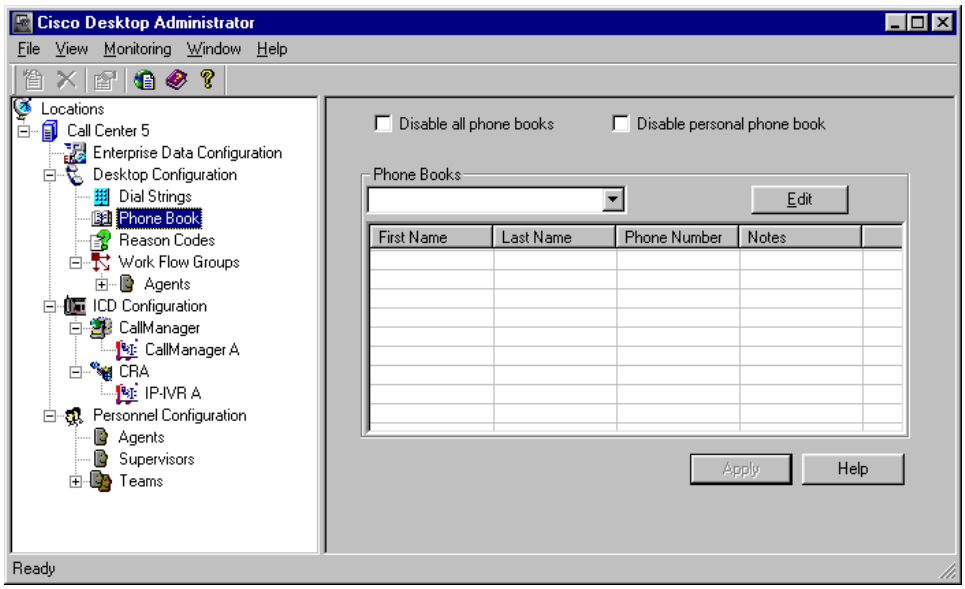
- Menu paths appear in bold type with menu options separated by right angle brackets:

  Choose **Options > Status Bar**.

The Desktop Administrator Interface

The Desktop Administrator interface has two panes. The left pane is a navigation tree similar to that found in Windows Explorer. The right pane displays the application that you choose in the left pane.

Figure 1-1. The Desktop Administrator interface. In this example, the Phone Book node is selected in the left pane and displayed in the right pane.



The root of the navigation tree is Locations. Underneath Locations is a list of the logical contact centers set up in your system. Underneath each logical contact center is a list of the applications that administer Agent Desktop and Supervisor Desktop for that logical contact center.

> **NOTE:** When you select a node on the navigation tree, the menu bar and toolbar of Desktop Administrator change to reflect the design of that node's application.

Navigation Tree Pane Navigation

Use these mouse or keyboard actions in the left pane to navigate the tree.

Mouse

- Double-click an icon/application name to expand or collapse the tree.
- Click the plus sign (+) to expand the tree.
- Click the minus sign (–) to collapse the tree.
- Right-click to rename or delete a node (not available for all nodes).

Keyboard

With a node selected,

- Press the up and down arrow keys to move from one node to the next.
- Press the left arrow key to collapse the tree.
- Press the right arrow key to expand the tree.
- Press F2 to rename an icon (not available for all nodes).

Display Pane Navigation

The applications displayed in the right pane are designed to use shortcut keys and the tab key as alternatives to using the mouse to navigate around a window. In this version of Desktop Administrator, however, the shortcut keys and tab key are not functional. It is recommended that you rely on the mouse to navigate around a window.

User Privileges in Windows NT and Windows 2000

Because Desktop Administrator users must be able to update registry settings, they must have Administrator or Power User privileges on Windows NT and Windows 2000 platforms.

Only a person with Administrator privileges can change user privileges on the Administrator PC if it is necessary to upgrade them.

Passwords

Desktop Administrator

A password is optional for Desktop Administrator. If you choose to use a password, the password applies only to the Desktop Configuration application within Desktop Administrator.

If you choose the Desktop Configuration node and the password function is enabled, you will be prompted to provide the password.

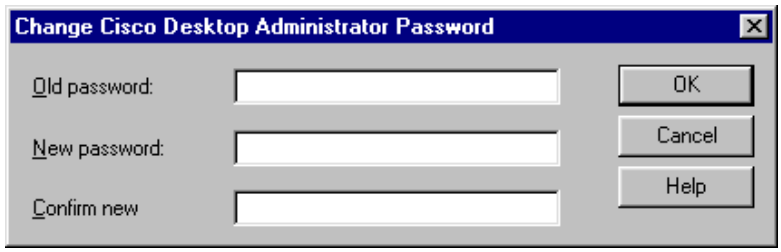
Your password should remain confidential. If it becomes known, change it.

▶ **To set up a password:**

1. In the navigation pane, select the Desktop Configuration node or any node underneath it.
2. From the **File** menu, choose **Change Cisco Desktop Administrator Password**.

   The Change Cisco Desktop Administrator Password dialog box appears. (See Figure 1-2.)

Figure 1-2. Change Password dialog box. If you are setting up a new password, the Old Password field is disabled.



3. Enter a new password, type it again to confirm it, and then click **OK**.

   Passwords are case sensitive and may consist of up to a maximum of 32 alphanumeric characters.

   The Desktop Configuration node is now password protected.

▶ **To change your password:**

1. In the left pane, select the Desktop Configuration node or any node underneath it.
2. From the **File** menu, choose **Change Cisco Desktop Administrator Password**.

   The Change Cisco Desktop Administrator Password dialog box appears. (see Figure 1-2.)
3. Enter your old password, a new password, and your new password again to confirm it, and then click **OK**.

   Your Desktop Configuration password is now changed.

   NOTE: If you forget your password, you must reinstall Desktop Administrator.

Agent Desktop and Supervisor Desktop User IDs and Passwords

Agent Desktop

Agent Desktop user IDs and passwords are set up in CallManager and can be administered only through CallManager. The user's Agent Desktop password is verified on the CTI server when a user starts Agent Desktop.

Use CallManager to change a user's Agent Desktop password if it becomes necessary to do so.

Supervisor Desktop

A user's Supervisor Desktop user ID and password are the same as the user's Agent Desktop user ID (the user ID, as set up in CallManager, is used in both the user ID and password fields). User IDs and passwords are verified in Directory Services when the user starts Supervisor Desktop.

The only way to change a Supervisor Desktop password is to issue the user a new Agent Desktop user ID in CallManager.

CTI Server Configuration and Directory Services Synchronization

From the Locations node level in the Navigation pane, you can configure the CTI server and synchronize the agent database between the ICD server and the Directory Services server.

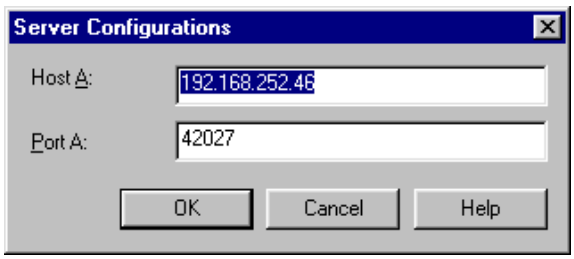
Configuring the CTI Server

▶ **To configure the CTI server:**

1. Select the Locations node in the left pane.
2. From the **Setup** menu, choose **CTI Server**.

   The Server Configurations dialog box appears. (See Figure 1-3.)

Figure 1-3. Server Configuration dialog box.



3. Enter the host name or IP address and port numbers of the CTI server you are using, and then click **OK**.

   The host name/IP address and port number of the CTI server are set.

Synchronizing Directory Services

The ICD agent database is the master database. The Directory Services database should mirror the ICD agent database. You can synchronize the agent database between the ICD server and the Directory Services server with the Synchronize Directory Services command.

You can program the synchronization function to perform automatically (for instance, once a minute) by changing a setting in the DirAccessSynSvr.cfg file (refer to *Cisco Desktop Product Suite 4.3 Service Information*, Chapter 3), or you can synchronize the databases manually.

▶ **To manually synchronize the databases:**

1. In the left pane, choose **Locations**.
2. From the **Setup** menu, select **Synchronize Directory Services**.

   When the synchronization is complete, the system displays a confirmation message.

Enterprise Data Configuration

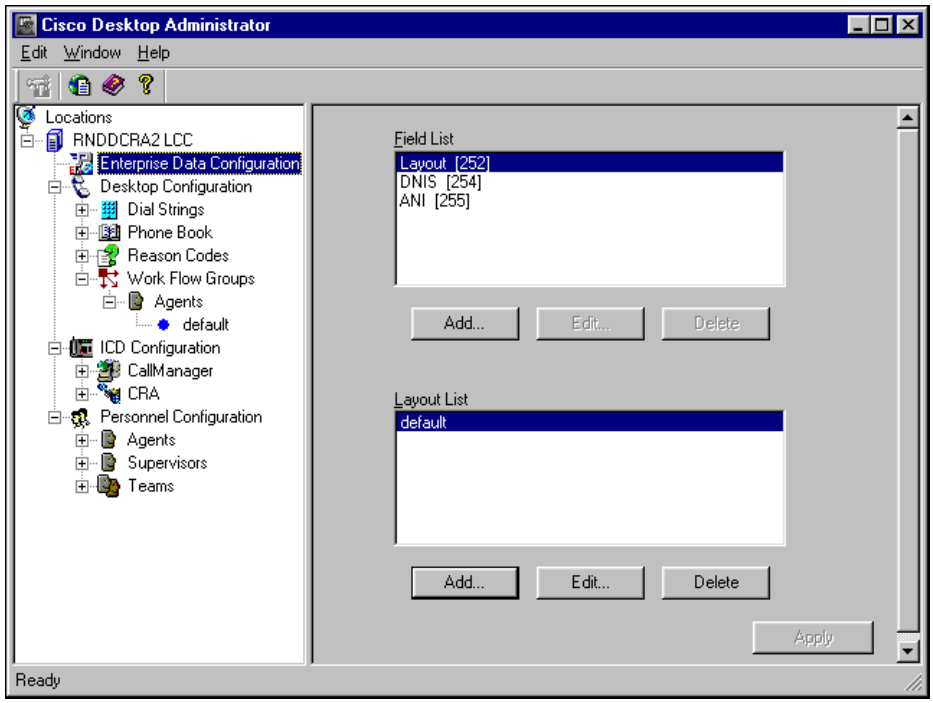
2

Introduction

Enterprise Data Configuration enables you to set up fields and layouts displayed by the Enterprise Data application.

To use Enterprise Data Configuration, select the Enterprise Data Configuration noe in the left navigation pane of the Desktop Administrator window. The Enterprise Data Configuration window appears, as shown in Figure 2-1.

Figure 2-1. The Enterprise Data Configuration window.



Toolbar and Menu Bar

Toolbar

The Enterprise Data Configuration toolbar contains four buttons.

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

Button	Name	Description
	Enterprise Configuration	Inactive in this version
	Web	Opens your web browser and access Cisco's website
	Help	Accesses online help
	About	Displays copyright and version information

Menu Bar

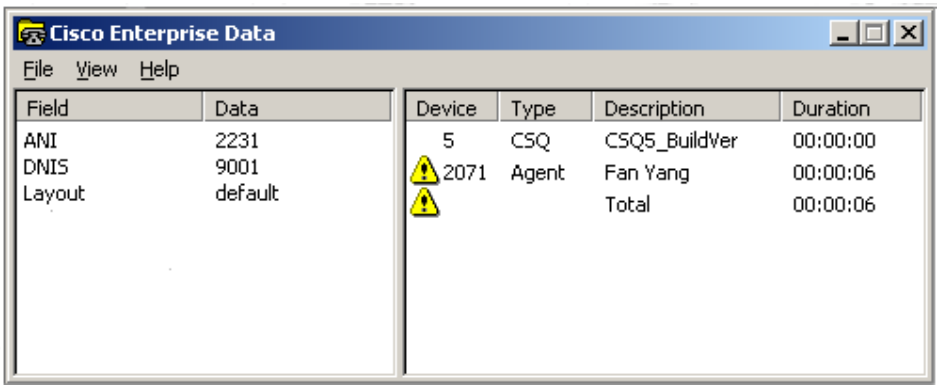
Enterprise Data Configuration includes the following menu bar options:

Option	Description
Edit	Inactive in this version
Window	Toggles your control from one pane to the other
Help	Accesses online help and displays copyright and version information

Configuring Cisco Enterprise Data

When Cisco Enterprise Data is enabled on an agent desktop (see “Enterprise Data” on page 3-48), enterprise data associated with an incoming call is displayed on the agent desktop, as shown in Figure 2-2.

Figure 2-2. Enterprise Data as displayed on the agent desktop.



You can use the Enterprise Data Configuration window to specify what information is displayed and how it appears. When you select Enterprise Data Configuration in the Navigation pane, the Display pane displays the Field List and Layout List, as shown previously in Figure 2-1.

Fields

The Field List displays both predefined fields available for your switch type and custom fields you create using the Field Editor.

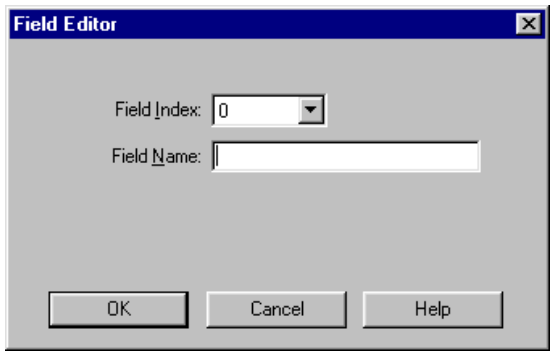
Predefined fields have index numbers of 231–255 and may not be edited. Custom fields may use index numbers 0–230 and may be edited.

▶ **To add a custom field to the Field List:**

1. In the Field List area, click **Add**.

   The Field List Editor dialog box appears. (See Figure 2-3.)

Figure 2-3. The Field Editor dialog box.



2. Choose a field index number from the drop-down list.

   The field automatically shows the next available number..

3. Enter a field name that describes the contents of the field.

   The field name can contain alphanumeric characters, an underscore (_), and a period (.). No spaces are allowed.

4. Click **OK**.

   The Field Editor dialog box closes.

5. In the Enterprise Data Configuration window, click **Apply** to save your changes.

▶ **To edit an existing custom field:**

1. In the field list, select the field you want to edit, and then click **Edit**.

   The Field Editor dialog box appears.

2. Enter your change, and then click **OK**.

   The Field Editor dialog box closes.

   NOTE: You can edit the custom field's name only, not its number.

3. In the Enterprise Data Configuration window, click **Apply** to save your changes.

▶ **To delete a custom field:**

1. N the field list, select the field you want to delete.

   NOTE: You can delete custom fields only.

2. Click **Delete.**

3. Click **Apply** to save your changes.

Layouts

The Layout List displays the field layouts available for use on the agent desktop. Each layout may contain up to 16 fields chosen from the fields in the Field List.

During a screen pop, the data layout used (if other than the default) is determined by an ICD application script.

▶ **To use a layout other than the default layout:**

1. Create a new layout. (See the procedure that follows.)

   A field with an index of 252 already exists and is associated with the field name "Layout." This is the index (datatype) for all layouts.

2. Write an ICD Application script that contains the Set Enterprise Server Data Step(s), and reference the new layout name in the script.

   The Enterprise datatype field in the Set Enterprise Server Data step should be 252, and the Enterprise datavalue should be the name of the layout you created in Step 1.

   The datatype is 252 for all layouts. Only the layout name differs. If a specific layout name is not referenced, the default layout will be used to display enterprise data.

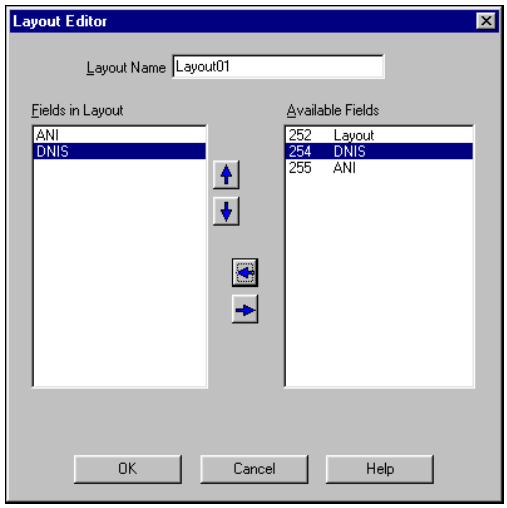
   See the *ICD Steps and Developers Guide* for information on creating ICD Applications scripts and the Enterprise Steps.

▶ **To create a new layout:**

1. In the Layout List area, click **Add**.

   The Layout Editor dialog box appears. (See Figure 2-4.)

Figure 2-4. The Layout Editor dialog box.



2. In the Layout Name field, enter a name for your layout.
3. Select the desired field from the available fields in the right pane and either click the left arrow button or double-click your selection to move it to the left pane. You may select up to 16 fields.
4. To rearrange the order in which fields are displayed in the left pane, select a field and click the up or down arrow button to move the field up or down in the list.
5. When the layout is arranged to your satisfaction, click **OK**.

   The Layout Editor dialog box closes.
6. In the Enterprise Data Configuration window, click **Apply** to save your changes.

▶ **To edit an existing layout:**

1. In the Layout List, select the layout you want to edit, and then click **Edit**.

   The Layout Editor dialog box appears. (See Figure 2-4.)
2. Make your changes.
3. Click **OK**.

   The Layout Editor dialog box closes.
4. In the Enterprise Data Configuration window, click **Apply** to save your changes.

▶ **To delete an existing layout:**

1. In the Layout List, select the layout you want to delete.
2. Click **Delete**.

   The layout is deleted.
3. In the Enterprise Data Configuration window, click **Apply** to save your changes.

Desktop Configuration

3

Introduction

Desktop Configuration enables you to configure and maintain the appearance and behavior of Agent Desktop. Desktop Configuration has four functions:

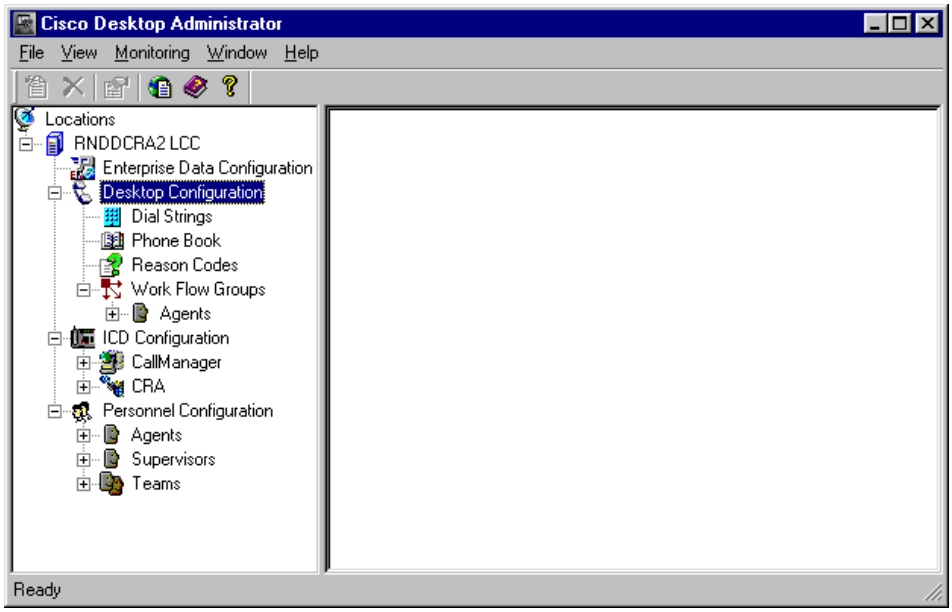
- Dial Strings
- Phone Book
- Reason Codes
- Work Flow Groups

To use any Desktop Configuration application, select its node in the left Navigation pane of the Desktop Administrator window. (See Figure 3-1.) The right Display pane shows the selected application.

NOTE: Desktop Configuration functions can be password protected. See "Passwords" on page 7. for more information.

NOTE: The User Interface and Work Flow functions under Work Flow Groups are disabled in Standard Desktop Administrator. These features are available only in Enhanced Desktop Administrator.

Figure 3-1. The Desktop Configuration window.



Toolbar and Menu Bar

Toolbar

The Desktop Configuration toolbar contains six buttons.

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

Button	Name	Description
	New	Adds a new work flow group (enabled when a Work Flow Group subnode is selected)
	Delete	Deletes the selected work flow group
	Properties	Displays the configuration file path of the selected work flow group
	Web	Opens your web browser and accesses Cisco's website
	Help	Accesses online help
	About	Displays copyright and version information

Menu Bar

Desktop Configuration has the following menu options:

Option	Description
File	
New	Adds a new work flow group
Delete	Deletes a work flow group
Rename	Renames a work flow group
Properties	Displays a work flow group's configuration file path

Option	Description
Copy Macros	Copies one work flow group's macros to another work flow group
Change Password	Enables you to change your password or create a new one
View	Hides/shows the Desktop Configuration toolbar
Monitoring	
Notify Monitoring	Select to notify agents that the supervisor is monitoring phone conversations
Notify Recording	Select to notify agents that the supervisor is recording phone conversations
Window	Toggles your control from one pane to the other
Help	Accesses online help and copyright and version information

Dial Strings

Use the Dial Strings function to configure the way Agent Desktop displays and dials phone numbers.

Check the appropriate check box at the bottom of the Dial Strings pane to choose the dial string format you will use. The available formats are:

- North American Dial String format
- Variable Format Dial String format

Different tabs display depending on your choice.

North American Dial String Format

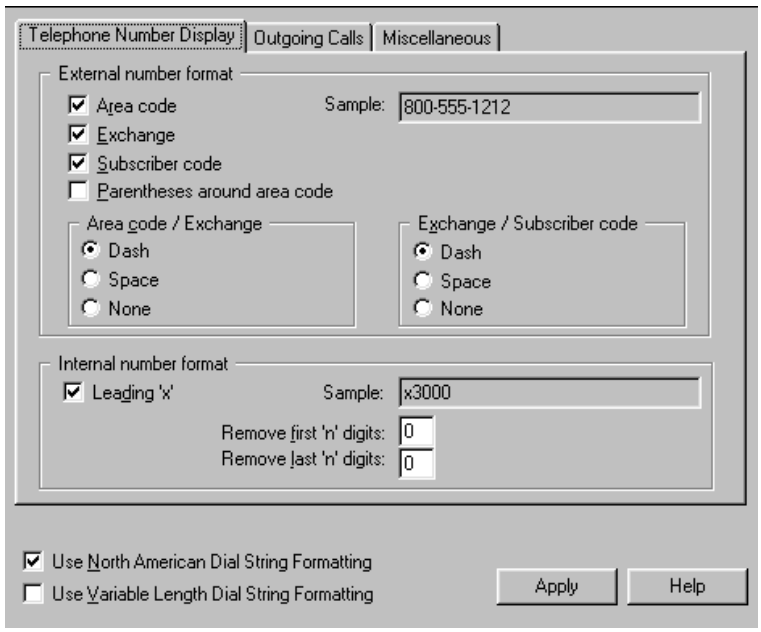
If you choose the North American dial string format, the following three tabs are active:

Telephone Number Display Tab

The Telephone Number Display tab (Figure 3-2) enables you to configure how phone numbers are displayed in Agent Desktop.

The selections you make are reflected in the Sample fields. (An exception is if you enter a value in either of the “Remove first ‘n’ digits” and “Remove last ‘n’ digits” fields. In that case, the sample does not change.)

Figure 3-2. Telephone Number Display tab.



Tab Section	Description
External number format	Specify the ANI and DNIS phone numbers format
Area code/Exchange	Specify the separator between the area code and exchange
Exchange/Subscriber code	Specify the separator between the exchange and the subscriber code
Internal number format	Specify the internal phone numbers format. You may include an X (extension) and remove the leading or trailing digits (in the event that extension numbers are less than 4 digits long).

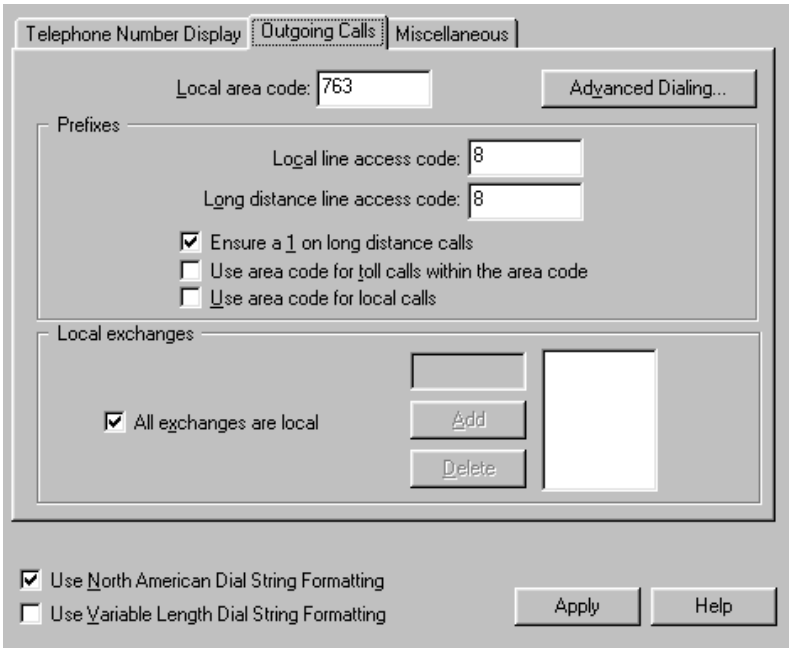
▶ **To configure the telephone number display:**

- Check or uncheck the check boxes and radio buttons on the Telephone Number Display tab as desired, and then click **Apply** to save your changes.

Outgoing Calls Tab

The Outgoing Calls tab (Figure 3-3) enables you to configure your local area codes and exchanges.

Figure 3-3. Outgoing Calls tab.



Tab Section	Description
Local area code	Enter the local 3-digit area code.
Advanced Dialing…	Click to configure advanced internal and external dialing. (See page 3-8.)
Prefixes	• Local line access code. Enter the number required to access an outside local line • Long distance line access code. The number required to access an outside long distance line • Ensure a 1 on long distance calls. Check to automatically add a 1 at the beginning of a long distance phone number • Use area code for toll calls within the area code. Check to automatically add the local area code to any calls dialed to numbers not included in the local exchange list. • Use area code for local calls. Check to automatically add the local area code to any calls dialed to numbers included in the local exchange list.
Local exchanges	Check **All exchanges are local** or click **Add** to build a list of exchanges for which it is NOT necessary to add a 1 before dialing

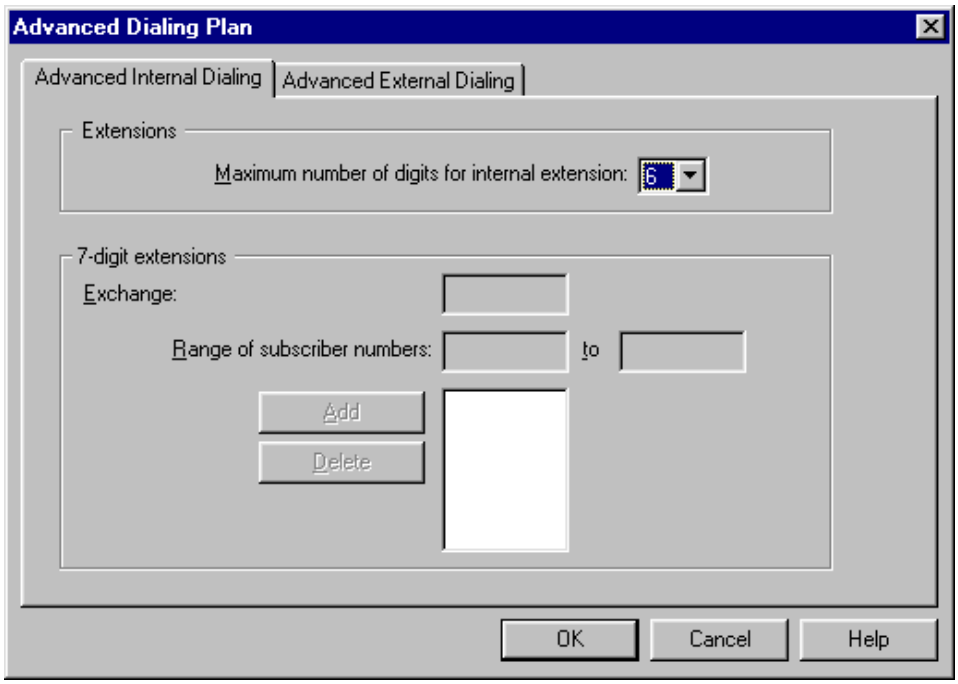
▶ **To configure outgoing calls:**

- Enter information and check or uncheck the appropriate check boxes on the Outgoing Calls tab as desired, and then click **Apply** to save your changes.

Advanced Internal Dialing

The Advanced Internal Dialing tab (Figure 3-4) enables you to configure more internal dialing options. Access it by clicking the Advanced Dialing button on the Outgoing Calls tab.

Figure 3-4. Advanced Internal Dialing tab.

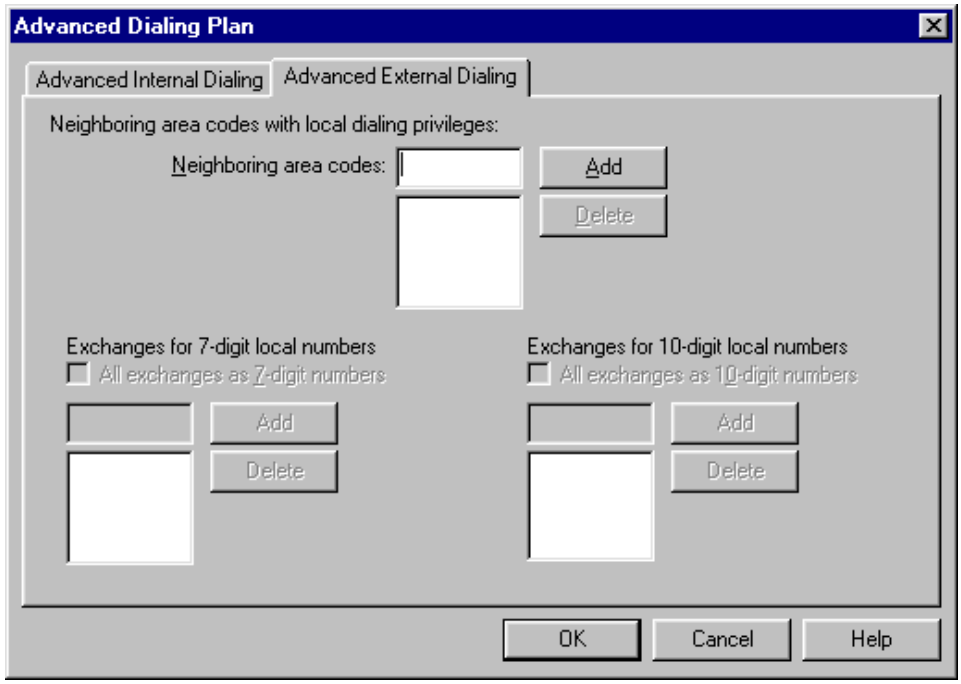


Tab Section	Description
Extensions	The maximum number of digits in an internal extension number, from 1–7. If you select 7, you must specify the internal exchange and the corresponding range of subscriber numbers so the application can distinguish between a 7-digit internal phone number and a 7-digit outgoing call.
7-digit extensions	If you specified a 7-digit extension number, enter the internal exchange and the corresponding range of extension numbers from low to high. Click **Add** to add them to the list.

Advanced External Dialing Tab

The Advanced External Dialing tab (Figure 3-5) enables you to configure more external dialing options. Access it by clicking the Advanced Dialing button on the Outgoing Calls tab.

Figure 3-5. Advanced External Dialing tab.



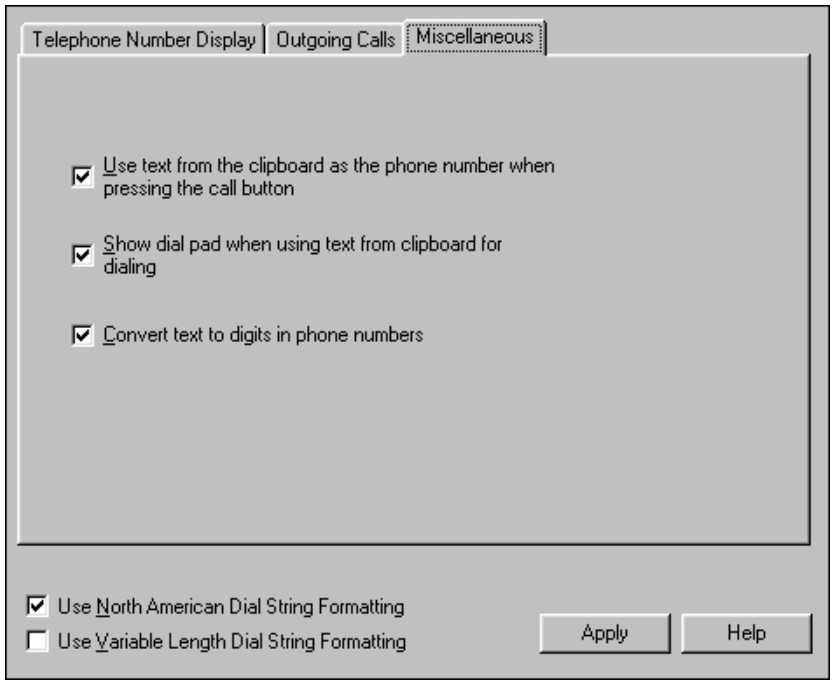
Window Section	Description
Neighboring area codes with local dialing privileges	The area codes to which you can place non-toll calls. Click **Add** to add a new area code to the list and click **Delete** to remove an area code from the list.
Exchanges for 7-digit local numbers	Choose the neighboring area code, then enter the exchanges within that area code which do not require you to dial 1 or the area code. Check **All exchanges as 7-digit numbers** if no exchange requires you to dial 1 or an area code.
Exchanges for 10-digit local numbers	Choose the neighboring area code, then enter the exchanges within that area code that require you to dial the area code but not a 1. Check **All exchanges as 10-digit numbers** if all exchanges require you to dial an area code but not a 1.

Miscellaneous Tab

The Miscellaneous tab (Figure 3-6) sets up further dialing properties.

> **NOTE:** This tab is the same for the North American and variable length dial string formats.

Figure 3-6. Miscellaneous tab



Tab Section	Description
Use text from the clipboard as the phone number when pressing the call button	Check to enable Agent Desktop to use text on the clipboard as the dialed number when the Call button is pressed, as long as the text on the clipboard is a valid text string.
Show the dial pad when using text from the clipboard for dialing.	Available only if "Use text from the clipboard…" is enabled. Check to display the dial pad before dialing a number copied from the clipboard. If this box is not checked, Agent Desktop dials the number without displaying the dial pad.
Convert text to digits in phone numbers	Converts phone numbers expressed in alpha characters (for example, 1-800-ANYWORD) to their numeric equivalents before dialing.

▶ **To configure the miscellaneous options:**

- Check or uncheck the appropriate check boxes on the Miscellaneous tab as desired, and then click **Apply** to save your changes.

Variable Length Dial String Format

If you choose the variable length dial string format, the following three tabs are active:

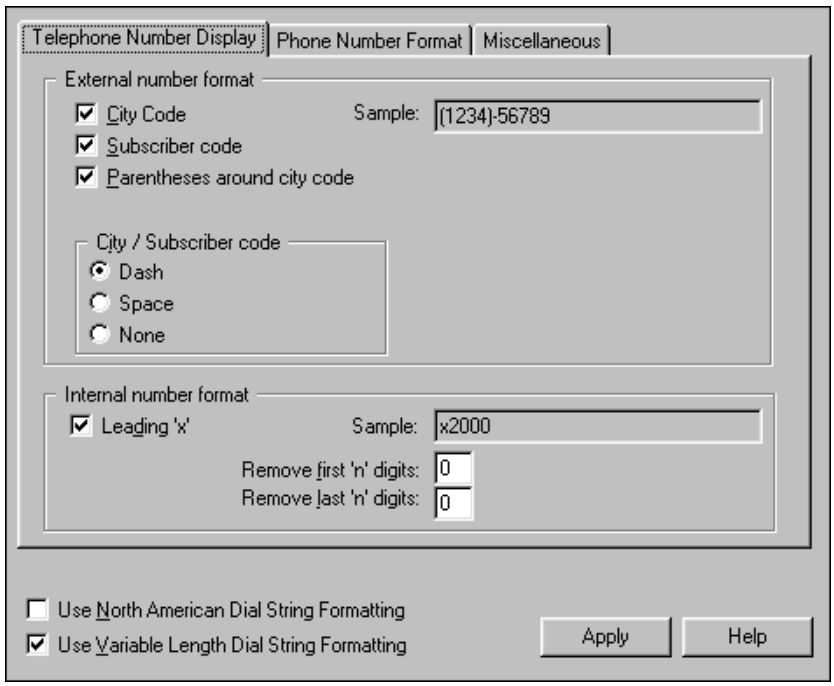
Telephone Number Display Tab

The Telephone Number Display tab (Figure 3-7) enables you to configure how phone numbers are displayed in Agent Desktop.

The selections you make are reflected in the Sample fields. (An exception is if you enter a value in either of the “Remove first ‘n’ digits” and “Remove last ‘n’ digits” fields. In that case, the sample does not change.)

> **NOTE:** The number of digits displayed in each section of the sample phone number is for illustration only. The samples do not reflect the number format you set up on the Phone Number Format tab.

Figure 3-7. Telephone Number Display tab.



Tab Section	Description
External number format	Specify how you want to view ANI and DNIS phone numbers.
City/subscriber code	Specify the separator you want to display between the city code and the subscriber code.
Internal number format	Specify how internal phone numbers are displayed. You may include an X (extension) and remove the leading or trailing digits (in the event that extension numbers are less than 4 digits long).

▶ **To configure the telephone number display:**

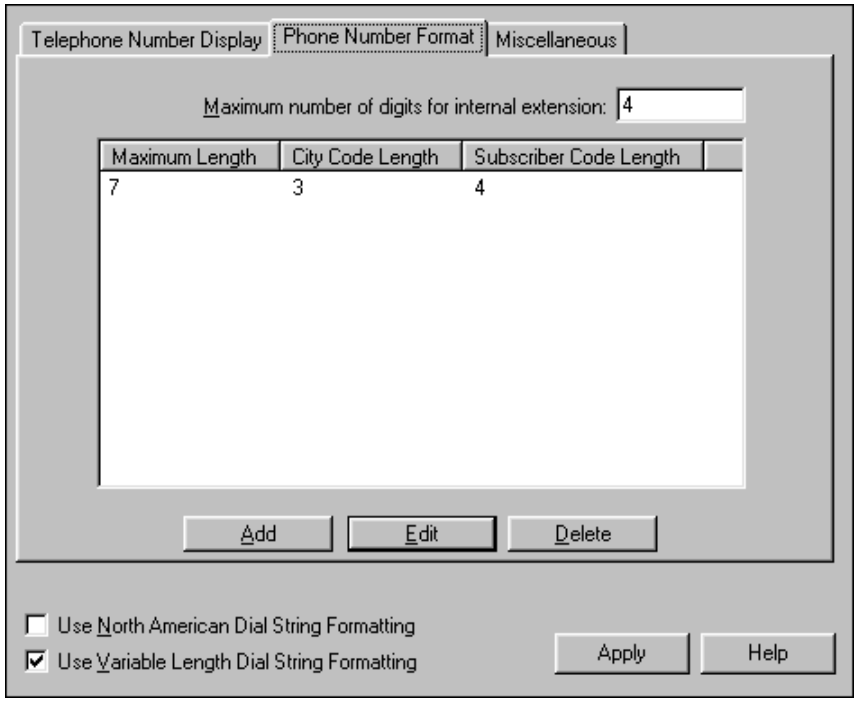
- Enter data and check or uncheck the appropriate check boxes and radio buttons on the Telephone Number Display tab as desired, and then click **Apply** to save your changes.

Phone Number Format Tab

The Phone Number Format tab (Figure 3-8) enables you to establish the format for phone numbers that do not follow the North American dial string format. You can also set the maximum number of digits in an internal phone extension.

You can establish as many formats as you want, as long as each one has a unique total length.

Figure 3-8. Phone Number Format tab.



▶ **To add a new phone number format:**

1. Click **Add**.

   The Add City/Subscriber Code Lengths dialog box appears.

2. Enter the number of digits in the city code and the subscriber code, and then click **OK**.

   The numbers you entered are displayed in the phone number format pane, along with the calculated total length of the format. You cannot enter another format with the same total length.

3. Click **Apply**.

   The new phone number format is saved.

▶ **To edit a phone number format:**

1. Choose the number format, and then click **Edit**.

   The Edit City/Subscriber Code Lengths dialog box appears.

2. Make your changes, and then click **OK**.
3. Click **Apply** to save your changes.

   The phone number format is changed.

▶ **To delete a phone number format:**

1. Choose the number format, and then click **Delete**.
2. Click **Apply** to save your changes.

   The phone number format is deleted.

Miscellaneous Tab

The Miscellaneous tab for the variable length dial string format is the same as the tab for the North American dial string format.

See "Miscellaneous Tab" on page 3-10 for an description of the Miscellaneous Tab.

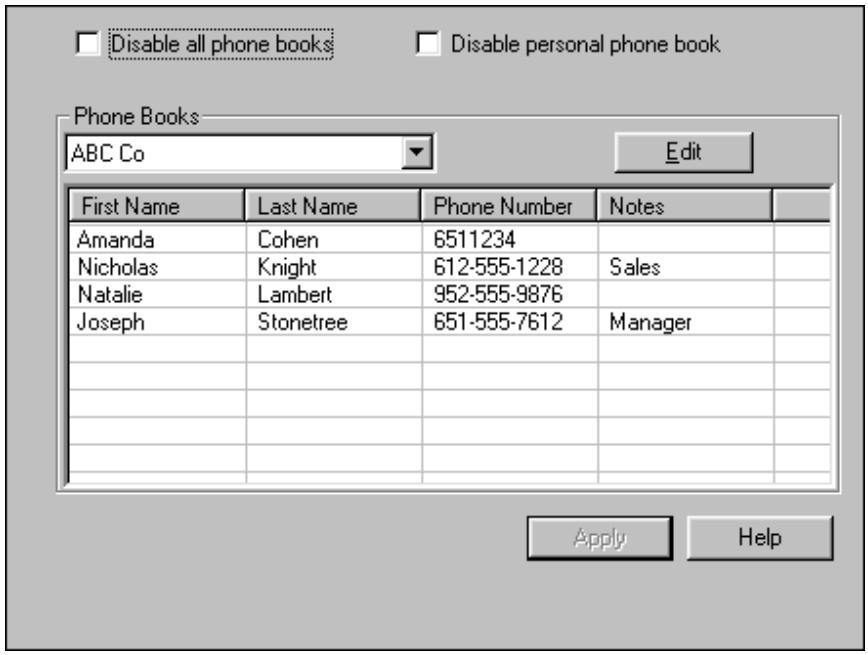
Phone Book

Agents have several lists of phone numbers available to them:

- The Recent Call List, a dynamic list of up to 100 recently called phone numbers kept by Agent Desktop
- A personal phone book, created and maintained by the agent (and enabled/disabled by the system administrator)
- Global phone books, created by the system administrator with the Phone Book function

The Phone Book window (Figure 3-9) enables you to set up and manage the global phone books that are shared by agents. Phone books and phone book entries are created and maintained in the Phone Book Editor dialog box (Figure 3-10).

Figure 3-9. Phone Book window.



Window Section	Description
Disable all phone books	Check to prevent agents from viewing global or personal phone books.
Disable personal phone book	Check to disable agents' personal phone books.
Phone Books	Select the phone book you want to view or edit from the drop-down list.
Edit	Click to create and edit phone books using the Phone Book Editor.

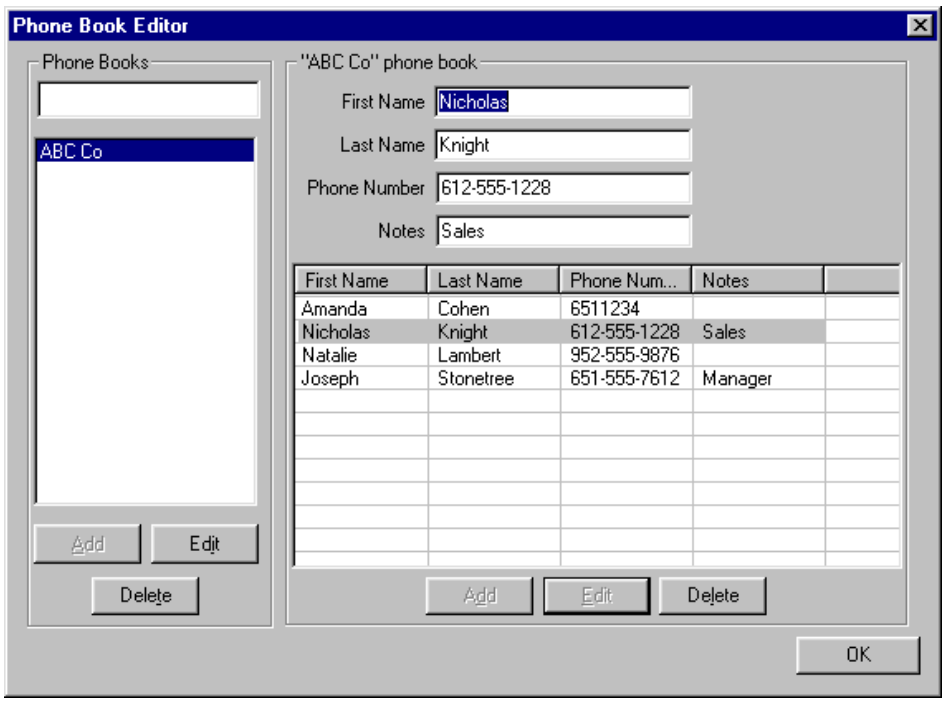
The Phone Book Editor enables you to set up and maintain global phone books.

▶ **To set up a new phone book:**

1. In the Phone Book window, click **Edit**.

   The Phone Book Editor dialog box appears.

Figure 3-10. Phone Book Editor dialog box.



2. Enter a new phone book name in the Phone Books field, and then click **Add**.

   The name of the new phone book is added to the list of phone books.

3. Click **OK**.

   The new phone book is saved and the Phone Book Editor dialog box closes.

▶ **To add phone book entries:**

1. In the Phone Book window, choose the phone book you want to edit from the drop-down list, and then click **Edit**.

   The Phone Book Editor dialog box appears.

2. Enter a name, phone number, and note (optional) for a person or company, and then click **Add** to add the information to the phone book.

3. Repeat Step 2 as needed to enter all entries to the phone book. When all entries are completed, click **OK**.

   Your entries are saved and the Phone Book Editor dialog box closes.

▶ **To edit phone book entries:**

1. In the Phone Book window, choose the phone book you want to edit from the drop-down list, and then click **Edit**.

   The Phone Book Editor dialog box appears.

2. Choose an entry in the phone book, and then take one of these actions:

   - Click **Edit**, and then change the entry
   - Click **Delete** to delete the entry

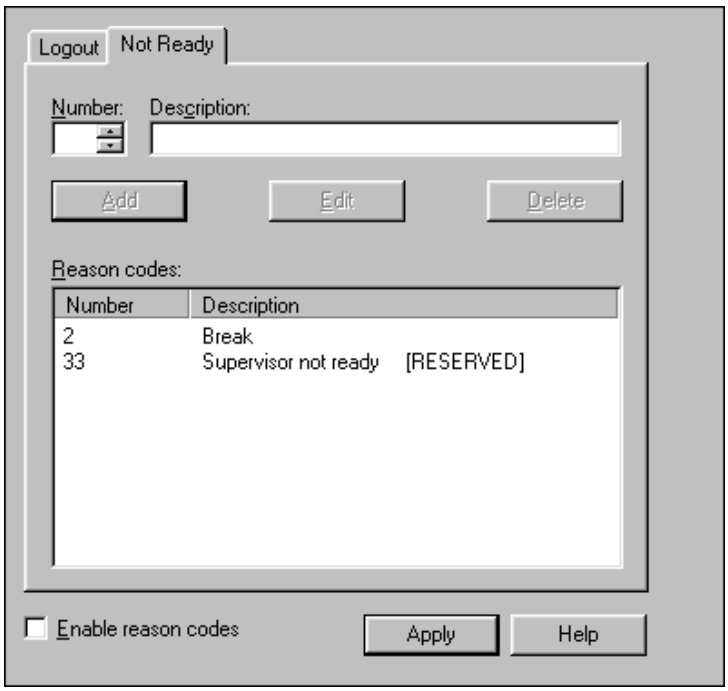
3. When all edits are completed, click **OK**.

   Your changes are saved and the Phone Book Editor dialog box closes.

Reason Codes

Reason codes describe why an agent has changed to the Not Ready agent state or has logged out. Reason codes are set up and maintained using the Reason Code window (Figure 3-11).

Figure 3-11. Reason Code window.



Reserved reason codes (identified by [RESERVED] after the description) are predefined in Directory Services and cannot be created or deleted. You can, however, change a reserved reason code's number.

> **NOTE:** You cannot enable reason codes unless at least one user-defined reason code exists for Logout and one exists for Not Ready.

When creating reason codes, follow these guidelines:

- Descriptions may consist of up to 40 alphanumeric characters. No punctuation or other characters are allowed.
- No agent state may contain duplicate numbers and descriptions among its reason codes.
- Reason code numbers must be between 1 and 9999.
- Reason codes are either all enabled or all disabled for all agent states. You cannot enable reason codes for one state and disable them for another.

▶ **To enable reason codes:**

- Check the **Enable reason codes** check box, and then click **Apply**.

  If at least one user defined reason code exists for Not Ready and one exists for Logout, reason codes are now enabled.

▶ **To add a new reason code:**

1. Choose the Logout or Not Ready tab, depending on the type of reason code you wish to create.
1. Enter a unique number and description for the reason code, and then click **Add**.

   The new reason code is added to the reason code list.
2. Click **Apply** to save your changes.

▶ **To edit an existing reason code:**

1. Choose the reason code you want to edit from the list.

   The reason code appears in the edit field.
2. Make your changes, and then click **Edit**.

   The edited reason code appears in the reason code list.
3. Click **Apply** to save your changes.

▶ **To delete an existing reason code:**

1. Select the reason code you want to delete.

   The reason code appears in the edit field.
2. Click **Delete**.

   The reason code is deleted from the reason code list.
3. Click **Apply** to save your changes.

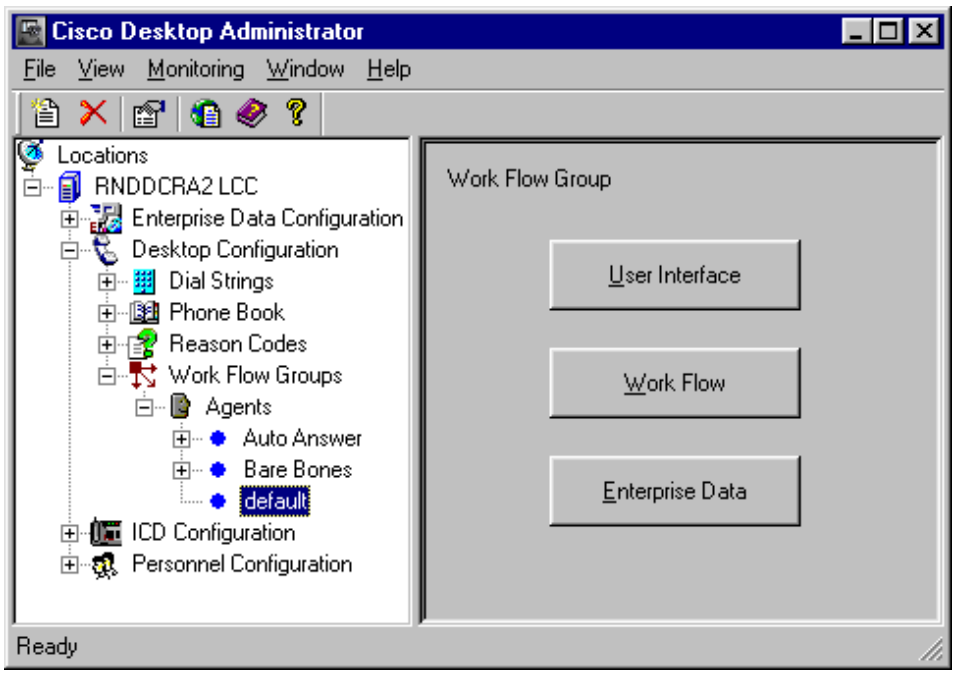
▶ **To cancel your changes before saving them:**

1. Do not click **Apply** after you have made a change.
2. Click on another node in the Navigation pane to leave the Reason Code window.

Work Flow Groups

Use the Work Flow Groups function to create and configure agent work flows and to customize the Agent Desktop interface.

Figure 3-12. The Work Flow Groups window.



Under the Work Flow Groups node are subnodes describing agent types.

> **NOTE:** Agent types are predetermined and may differ depending on the switch used.

Underneath each agent type are the specific work flow groups for that agent type. When you click on a specific work flow group in the left pane, the right pane displays three buttons:

- **User Interface**. This button enables you to configure the Agent Desktop interface for the selected work flow group (not available in Standard Desktop Administrator).
- **Work Flow**. This button enables you to create and edit work flows for the selected work flow group (not available in Standard Desktop Administrator).
- **Enterprise Data**. This button enables you to configure enterprise data on the agent desktop for the selected work flow group.

Maintaining Work Flow Groups

You can add, delete, or edit work flow groups.

▶ **To add a new work flow group:**

1. In the Navigation pane, choose an agent type or work flow group subnode (for example, under Agents, choose the Default work flow group).
2. From the **File** menu, choose **New**.

   The Work Flow Group Name Editor dialog box appears.
3. Enter a new work flow group name.

   If you want to copy an existing work flow group, check the "Copy the following work flow group check" box and choose a work flow group from the drop-down list.
4. Click **OK**.

   The new work flow group appears in the Navigation pane.

▶ **To edit an existing work flow group:**

1. In the Navigation pane, choose the work flow group you want to edit.
2. From the **File** menu, choose:
   - **Rename** to rename the group.

     Type over the work flow group's name in the navigation tree, and then press **Enter**.
   - **Delete** to delete the group.

     You are warned that all agents belonging to the work flow group you want to delete must be reassigned to other work flow groups. Click **Yes** to confirm the deletion, or **No** to cancel it.
   - **Properties** to view a dialog box showing the group's configuration file path.

     Click **OK** to close the dialog box.
   - **Copy Macros** to copy the macros of the selected work flow group to another work flow group.

     The Copy Macros dialog box appears. Select the destination work flow group from the drop-down list. You are warned that macros with identical names will be overwritten. Click **OK** to continue copying the macros.

User Interface Setup

The User Interface Setup window enables you to configure the appearance and behavior of Agent Desktop.

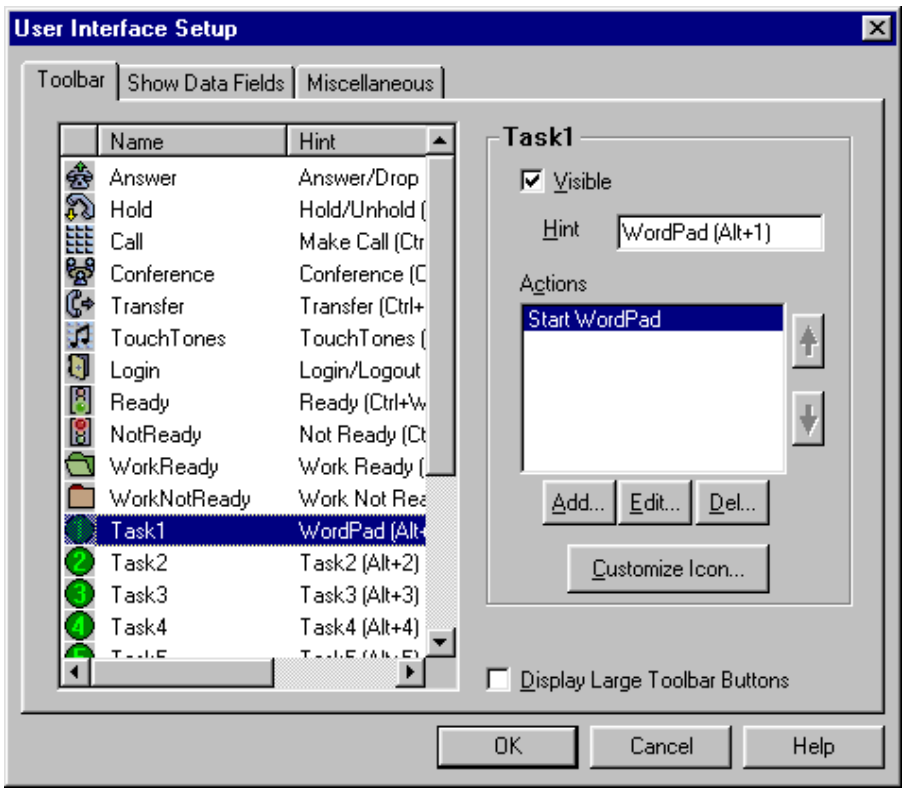
> **NOTE:** This functionality is not available in Standard Desktop Administrator.

Toolbar Tab

The Toolbar tab (Figure 3-13) enables you to:

- Show or hide buttons on the Agent Desktop toolbar
- Associate actions with task buttons
- Change task button hints
- Change the size of the toolbar buttons and the size of the icons displayed on the buttons
- Customize icons

Figure 3-13. Toolbar tab.



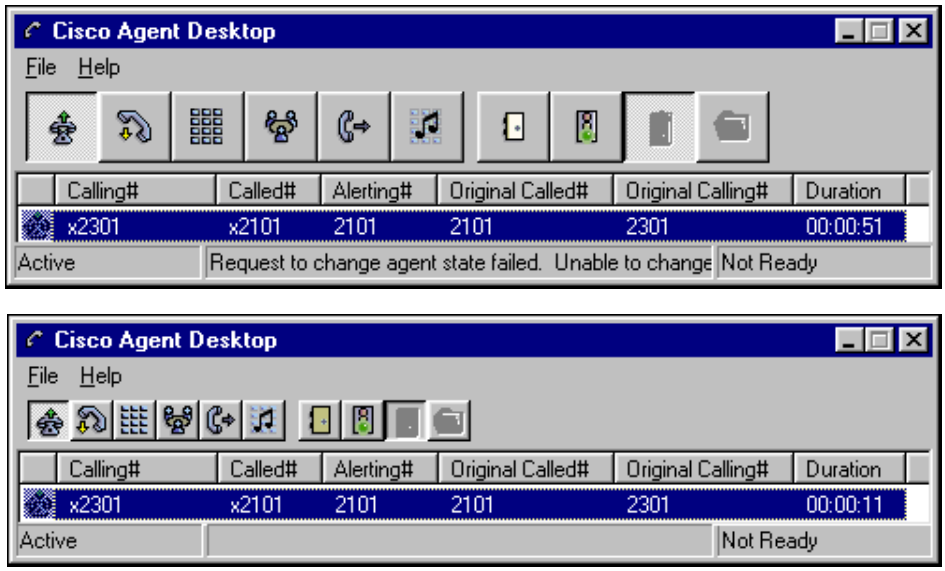
Buttons and Icons

Buttons are the gray squares visible on the Agent Desktop toolbar. *Icons* are the pictures on the buttons. You can control the size of the button as well as the size of the icon. You can also choose to use different icons on the buttons to customize the toolbar.

Large buttons and icons are 32 × 32 pixels. Small buttons and icons are 16 × 16 pixels. The default setting is small buttons and icons.

See Figure 3-14 for a comparison of the two button sizes. In this example, the button sizes are different, but the icon sizes are the same.

Figure 3-14. Comparison of Agent Desktop with large buttons (top) and small buttons (bottom) and small icons (both).



You can choose to display large icons on the buttons. See the procedure for customizing icons on page 3-24.

> **NOTE:** If you use large icons without choosing to display large buttons, the icons will be compressed to fit on the small buttons, and may appear distorted or blurry.

▶ **To display large buttons:**

- Check the **Display Large Toolbar Buttons** check box.

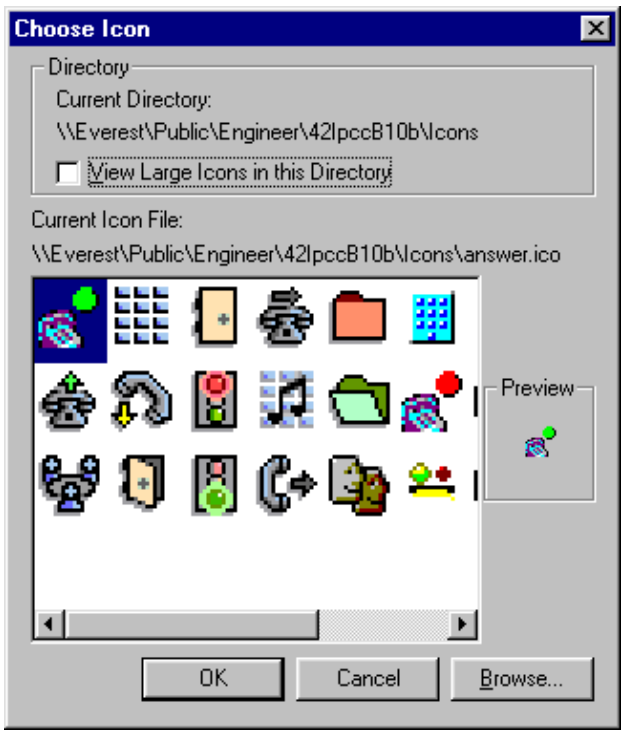
  NOTE: Agents must restart Agent Desktop for this change to take effect.

▶ **To customize an icon:**

1. Choose the button whose icon you want to customize.
2. Click **Customize Icon**.

   The Choose Icon dialog box appears (Figure 3-15), displaying the default set of small icons. Check the **View Large Icons in this Directory** check box if you want to use a large icon.

Figure 3-15. Choose Icon dialog box.



You can also click Browse to navigate to a directory containing icons if you wish to use your own icon set. This directory must be on a networked drive so it is accessible by all agent PCs. If it is not, the icon change will not show up on the agent desktop.

3. Choose an icon.

   The icon is displayed in the Preview area.

4. Click **OK**.

   The button is displayed with the new icon on it in the button list.

▶ **To add a button to the toolbar:**

- Choose a button in the list of available buttons and check the **Visible** check box.

▶ **To associate an action with a task button:**

You can associate as many actions with a task button as you wish. The actions are executed sequentially in the order they are listed in the Action window.

> **NOTE:** Bear in mind the amount of time it takes to execute actions. Generally, a maximum of two or three actions per task button is recommended.

1. Choose a task button in the list of available buttons.

   The default task buttons are the buttons numbered 1–10, which can be customized if you desire.

2. Check the **Visible** check box.

   The Actions pane and its associated buttons become enabled.

3. Under the Actions pane, Click **Add.**

   The Select Action window appears.

4. Click the appropriate tab to select the action you want to associate with the button.

   You can select an existing action or set up a new action. (See “Actions” on page 34. for more information on setting up new actions.)

5. Click **OK**.

   The Toolbar tab is displayed.

6. Type a short description of the action in the **Hint** field.

   NOTE: You cannot change the shortcut key combination.

7. Repeat Steps 3–6 if you want to add other actions to the same task button.

▶ **To change a task button’s hint:**

1. Choose the button whose hint you want to change.
2. In the **Hint** field, type your change.

   NOTE: You cannot change the shortcut key combination.

3. Click **OK**.

Show Data Fields Tab

The Show Data Fields tab (Figure 3-16) configures the data fields that appear in the Call Information pane in Agent Desktop.

The left pane displays the fields that appear in Agent Desktop. The right pane displays the fields available. Use the left and right arrows to move the available fields between the two panes, and the up and down arrows to set the left-to-right order in which they appear in Agent Desktop.

NOTE: The left pane must contain at least one field.

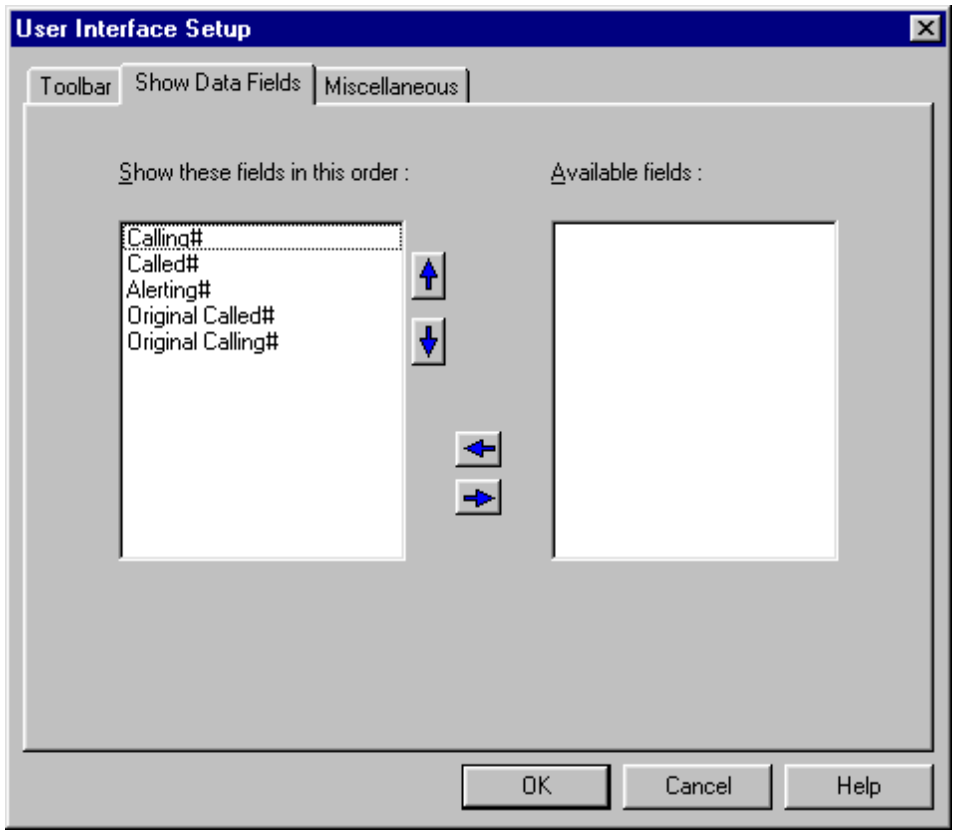
▶ **To rename a data field:**

1. Double-click the field.

   The Rename dialog box appears.

   Enter a new name, and then click **OK**.

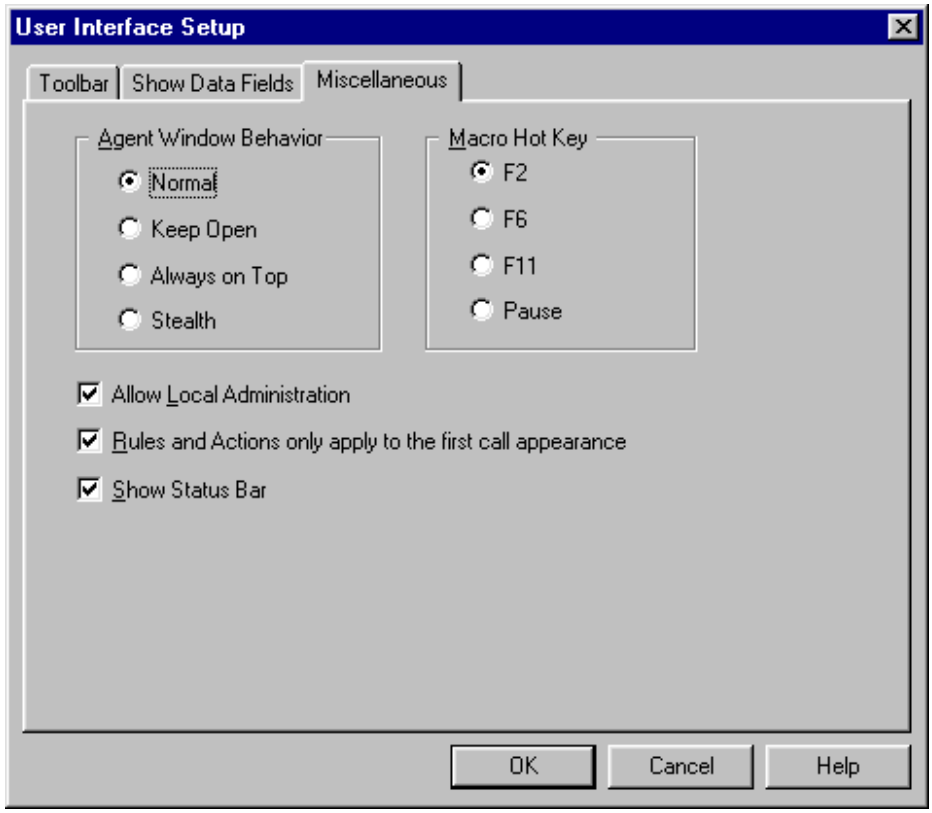
Figure 3-16. Show Data Fields tab.



Miscellaneous Tab

Use the Miscellaneous tab (Figure 3-17) to set other user interface options.

Figure 3-17. Miscellaneous tab.



Option	Description
Agent Window Behavior	Specify how you want the Agent Desktop window to behave: **Normal**. The window appears when calls are present and minimizes when idle. **Keep Open**. The window is always visible, but may be hidden by other open applications. **Always on Top**. The window is always visible and on top of other open applications. **Stealth**. The window appears as an icon in the system tray.
Macro Hot Key	Specify the key you want to use to pause macro recording and display the Suspend Macro Recording dialog. The default is F2.
Allow Local Administration	Check to allow agents to make temporary changes to their user interfaces. Note that permanent changes must be made through Desktop Administrator.
Rules and Actions only apply to the first call appearance	Check to invoke rules processing only for the oldest (top) call appearance. If the box is not checked, rules processing is invoked for all calls.
Show Status Bar	Check to display the status bar.

Work Flow

NOTE: This functionality is not available in Standard Desktop Administrator.

A work flow is a sequence of actions that takes place when a specific call event occurs. Use the Work Flow Setup window (Figure 3-18) to set up a work flow.

To set up a work flow, you must configure the following three functions:

- **Event**. An occurrence. Available events are startup, shutdown, ringing, answered, and dropped.
- **Rule**. A data condition that must be met before an action is performed.
- **Action**. An occurrence that happens when a rule is met.

When an event occurs, rules are evaluated. If a rule is met, an action takes place. For instance, a work flow could be set up so that an incoming call from a specific phone number is transferred to a specific agent:

- The event is Ringing;
- The rule is that the incoming phone number is 612-555-3271;
- The action is a blind transfer to agent Mary Jones.

The general procedure for setting up a work flow is:

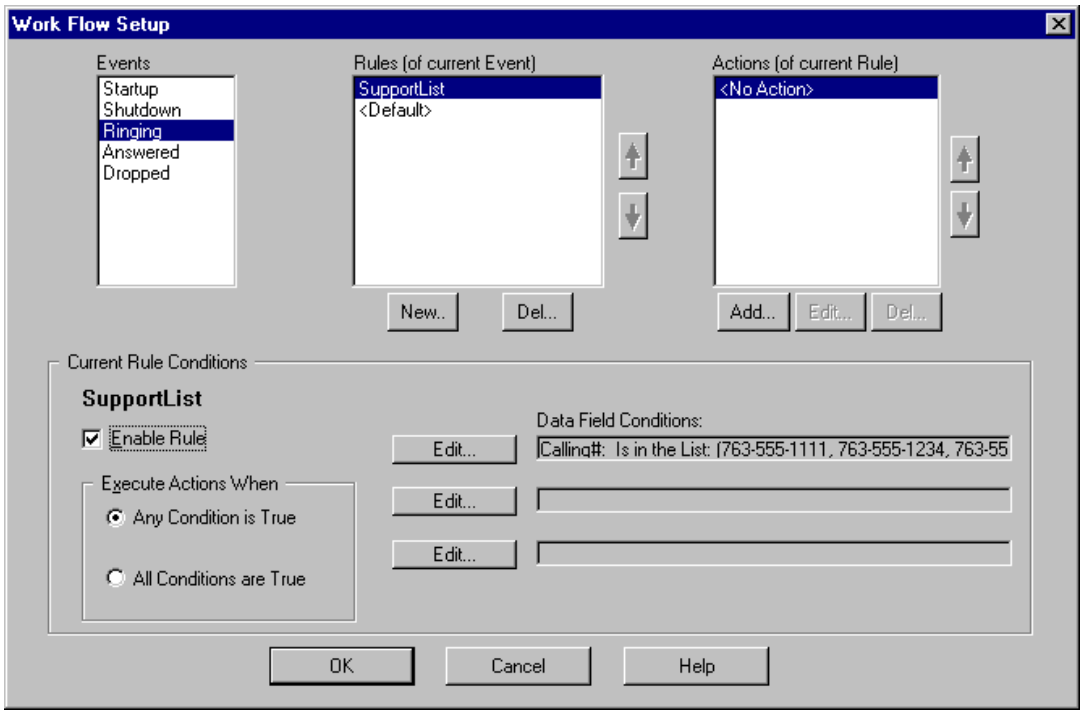
1. Select the event that triggers the work flow.
2. Set up one or more rules to determine if the action(s) should be run, and determine whether the action runs if either *any* of the rule's data conditions are met, or if *all* the rule's data conditions are met.
3. Choose one or more actions to run when the event occurs and the rules are met. Actions run in the order in which they appear in the list.

Notes on Setting Up Work Flows

When an application or call event occurs, the rules are evaluated in order. When a rule is met, all actions assigned to the rule run in order and subsequent rules are not evaluated.

Each event has a default rule that runs if all other rules are not met. The default rule cannot be deleted, and is always last in the list of rules applying to an event.

Figure 3-18. Work Flow Setup window.



Window Section	Description
Events	Select the occurrence to associate with rules and actions.
Rules (of current Event)	Specify the rules to associate with the selected event.
Actions (of current Rule)	Specify the actions to associate with the selected rule.
Current Rule Conditions	**Enable Rule**. Check to put the rule into effect. **Execute Actions When**. Check either Any Condition is True or All Conditions are True. This sets the data conditions for the rule to "Or" or "And" statements. **Data Field Conditions**. Specify up to 3 data field conditions set up for the rule. Click the Edit button next to each condition to create or edit it.

Events

Events are application and call occurrences in Agent Desktop. Available events are:

Event	Description
Startup	Agent Desktop starts on the agent's computer. No rules can be assigned to this event.
Shutdown	Agent Desktop shuts down on the agent's computer. No rules can be assigned to this event.
Ringing	The agent's phone rings.
Answered	The agent answers an incoming phone call.
Dropped	The phone call is terminated.

Rules

A rule is a set of one to three data field conditions. Each data field condition is set up separately.

When an event occurs, the rules associated with the event are executed in the order they are listed in the Work Flow Setup window (Figure 3-18).

When a rule is met, the actions associated with that rule are executed in the order they are listed in the Work Flow Setup window. Subsequent rules are not evaluated.

If no rules are met, the default rule governs, and all actions associated with the default rule are executed.

> **NOTE:** The default action might be <no action>. Default rules cannot be changed or deleted.

You can specify that an action is to be run if *any* data condition is true or if *all* data conditions are true by selecting the appropriate check box in the Work Flow Setup window.

Setting Up a New Rule

▶ **To set up a new rule:**

1. From the Work Flow Setup window, under the Rules area, click **New**.

   The New Rule Name dialog box appears (Figure 3-19).

2. Enter an appropriate name for the new rule, and then click **OK**.

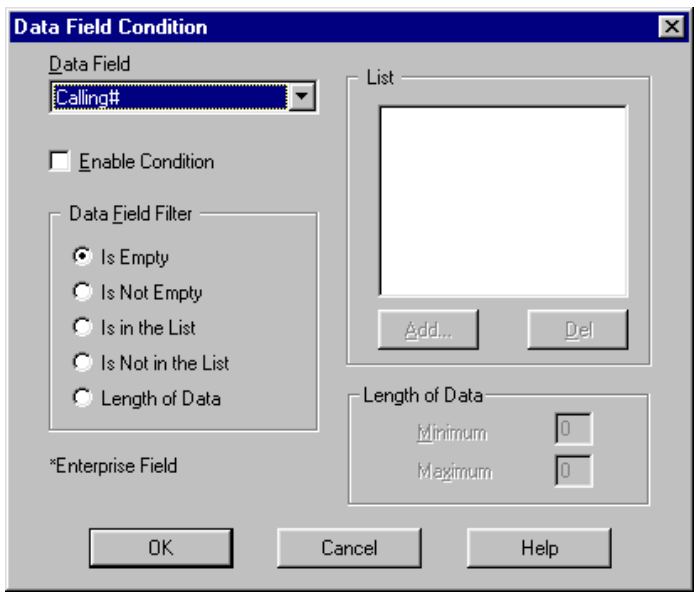
   The new rule is now listed in the Rules pane in the Work Flow Setup window. You many now set up one to three data field conditions to apply to the new rule.

Figure 3-19. New Rule Name dialog box.

3. With the new rule selected, click **Edit** next to the first Data Field Conditions field.

   The Data Field Conditions dialog box appears.

Figure 3-20. Data Field Conditions dialog box



4. Select a data field from the Data Field drop-down list.
5. Specify one of the data field filters:

Filter	Description
Is Empty	Data field is empty.
Is Not Empty	Data field is not empty.
Is in the List	Data field is included in the list you set up in the List pane. Click **Add** to add an item to the list of strings. **Note**: Items in the list may not include commas. For more information on adding strings, see "Wild Card Searches" on page 3-34.
In Not in the List	Data field is not included in the list you set up in the List pane. Click **Add** to add an item to the list of strings. **Note**: Items in the list may not include commas. For more information on adding strings, see "Wild Card Searches" on page 3-34.
Length of Data	Data field is within a specified range set in the Length of Data fields. Typical use is to differentiate between internal and external calls. Internal calls are 4-digit numbers, and external calls are 8- to 12-digit numbers. Enter the minimum and maximum length of data fields. **Note**: if your dial plan is set up to preface internal numbers with an "x", the data condition must also include an "x".

6. Check **Enable Condition**, and then click **OK**.

   The rule is now set up. You must associate it with an action and enable it in the Work Flow Setup window to put it into effect.

Wild Card Searches

You can use wild cards when entering items in the list pane in the Data Field Conditions dialog box (Figure 3-20). This enables you to avoid having to enter whole strings if the items you wish to list have common string elements.

Wild card characters used are the asterisk (*) and the question mark (?).

Asterisk wild card. An asterisk in a string may be replaced by any quantity of any character, as long as the other characters in the string match. For instance:

- **ABC*** matches ABCD, ABCDEERRGFG, and ABC$@, among others. All these matches start with ABC.
- ***ABC** matches DDABC, @#ABC, and 1234ABC, among others. All theses matches end with ABC.

Question mark wild card. A question mark in a string may be replaced by any character, but the length of the string must be exactly as represented. For instance:

- **ABC?** matches ABCD, ABC1, and ABC$, among others. The character represented by the question mark doesn't matter, but the length of the string must be four characters.
- **??ABC** matches 12ABC, $%ABC, and FEABC, among others. The two characters at the beginning of the string may be replaced by any character, but the length of the string must remain five characters.

Actions

Actions include:

Action	Description
Run Macro	Play back a recorded sequence of keystrokes. (See page 3-36.)
Call Control	Answer, drop, call, conference, or transfer a call, or input touch tones during a call. (See page 3-43.)
Launch External Application	Start a third-party application. (See page 3-44.)
Agent State	Set an agent state. (See page 3-46.)
Utility Action	Run a utility, such as start and stop recording or sending a predefined, high-priority chat message to a supervisor. (See page 3-47.)

Actions are stored independently of events and rules.You can use an action in more than one event, and you can assign actions to more than one task button in Agent Desktop.

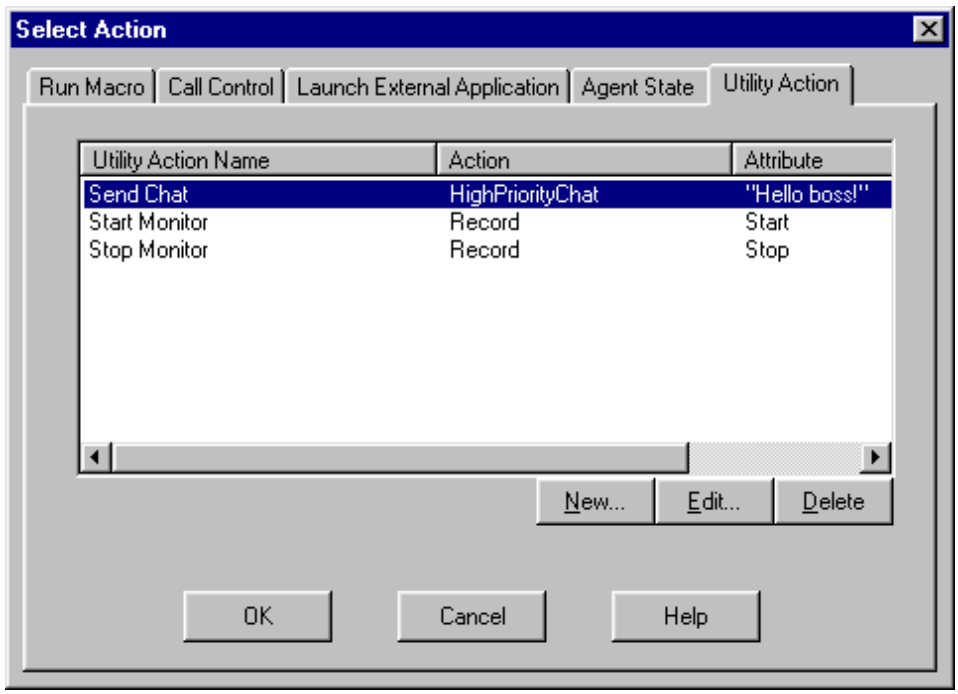
For instance, if a rule is true, the actions associated with it may launch an application and then play a macro to that application. While actions are being processed, events are queued. It is generally a good idea to avoid long actions.

▶ **To add a new action:**

1. In the Work Flow Setup window (Figure 3-18), select the event to be associated with the new action.
2. Under the Actions area, click **Add**.

   The Select Action dialog box appears. (See Figure 3-21.)

Figure 3-21. The Select Action dialog box (Utility Action tab selected).



3. Choose the tab for the type of action you want to associate with the event.
4. If the action already exists, select it, and then click **OK**.

   If the action does not yet exist, click **New** and follow the instructions for setting up that type of action as outlined below.
5. Click **OK**.

   The Select Action dialog box closes and you return to the Work Flow Setup window. The new action is listed in the Actions pane.

▶ **To edit an action:**

1. In the Work Flow Setup window, select the appropriate event, and then select the action you want to edit from the Actions pane.
2. Click **Edit**.

   One of several edit action dialog boxes appears (depending on the action you have chosen to edit).
3. Make your changes, and then click **OK**.

   The action is now changed.

▶ **To permanently delete an action:**

To permanently delete an action, you must first delete it from any event it is associated with, and then delete the action itself.

1. In the Work Flow Setup window, select each event. If the action you want to delete is associated with that event, select the action in the Action pane and click **Delete** to remove it from that event.

   The action is now removed from all events.
2. Under the Actions pane, click **Add**.

   The Select Actions dialog box appears.
3. Choose the appropriate tab, and then select the action you want to delete.
4. Click **Delete**.

   The action is deleted.
5. Click **OK**.

   The Select Action dialog box closes and you return to the Work Flow Setup window.

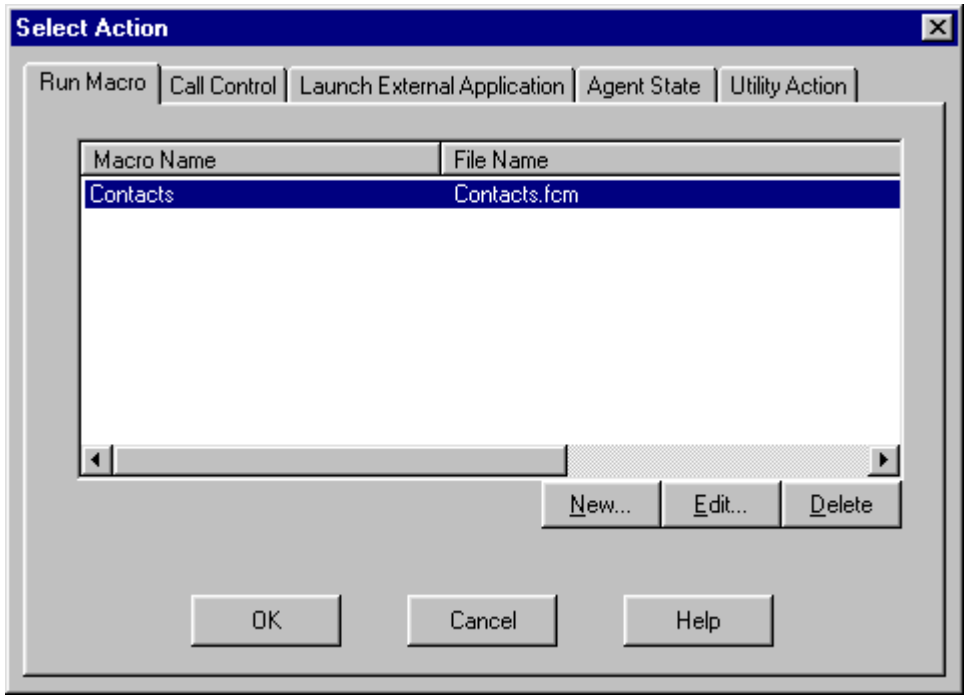
Run Macro Action

A macro is a shortcut for a sequence of keystrokes. For example, you might record a macro that performs the following tasks with each incoming call:

- Copy the ANI (Automatic Number Identification) from Agent Desktop to Microsoft Outlook
- Open a contact list
- Find the ANI in a database or spreadsheet
- Display a screen containing the caller's account information

For examples of creating macros, see Chapter 6, "Tutorials."

Figure 3-22. Run Macro tab.



Macro Recording Tips

If your macro accesses a third-party application, make sure that the application is open. Before you begin to record the macro, make a test run with the third-party application, writing down all of the keystrokes required for the tasks you wish to perform.

Avoid using the tab or arrow keys in your macro because the cursor may not always be in the same position each time a window opens. Rather, use keyboard shortcut keys to perform actions in the application.

Shortcut keys are indicated by an underlined letter in the button name, field name, or description. You press Alt, Ctrl, or Shift plus the underlined letter to perform the action. For instance:

In this case, pressing **Alt-W** clicks the Work Flow button.

> **NOTE:** The exact keystrokes for a keyboard shortcut are listed in the application's menu. For instance, in Microsoft Word, to find out what the shortcut is to save a document, choose **File** from the menu bar. On the drop-down menu the **Save** option is followed by its shortcut, **Ctrl-S**.

Common Windows shortcut keys are:

Shortcut Key	Description
Esc	Cancels an action.
Enter	Clicks **OK** or the default button in a dialog box. (Default buttons have a heavier border surrounding them.)
Ctrl-A	Selects all text.
Ctrl-C	Copies selected text to the clipboard.
Ctrl-P	Prints the document.
Ctrl-S	Saves the document.
Ctrl-V	Pastes text into the window at the cursor position.
Ctrl-X	Cuts selected text to the clipboard.

A macro may include keystrokes for multiple applications. For example, one macro may include keystrokes for word processing, spreadsheet, and database applications. To switch between applications when recording a macro, use the mouse to select the application. Do not press **Alt-Tab**. If you do, these keystrokes are recorded and may not select the correct application when you play back the macro.

> **NOTE:** Do not press **Ctrl-Esc** to click the Microsoft Windows Start button, or the Macro Recorder stops recording without providing a message showing that recording has stopped. All keystrokes recorded up to this point are deleted. To click **Start** without causing an error or stopping recording, use your mouse.

Allowable Macro Keystrokes

Key Type	Key	Macro Notation
Character	0 1 2 3 4 5 6 7 8 9	
	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	
	* + ; = , - . / ` [\ ] '	

Key Type	Key	Macro Notation
Non-Character	Tab	[TAB]
	Backspace	[BACKSPACE]
	Enter/Return	[ENTER]
	Shift	[SHIFT]
	Control/Ctrl	[CONTROL]
	Alt	[ALT]
	Pause/Break	[PAUSE]
	Caps Lock	[CAPSLOCK]
	Esc	[ESC]
	Space/Space Bar	[SPACE]
	Page Up/PgUp	[PAGE-UP]
	Page Down/PgDn	[PAGE-DOWN]
	End	[END]
	Home	[HOME]
	Left Arrow	[LEFT-ARROW]
	Up Arrow	[UP-ARROW]
	Right Arrow	[RIGHT-ARROW]
	Down Arrow	[DOWN-ARROW]
	Print Scrn	[PRINTSCREEN]
	Insert	[INSERT]
	Delete	[DELETE]
	F1 through F24	[F1] … [F24]

Special Command	Description
[ENTERPRISE FIELD:]	Inserts an Enterprise Data field.
[DATA FIELD:]	Inserts data from Agent Desktop.
[SYSTEM FIELD:]	Inserts data from Agent Desktop system fields.
[APPLICATION:=]	Changes focus to an application window. The equal sign (=) is used as a separator between the application and the window title. If either the application name or window title is missing, Agent Desktop attempts to find the correct application and window to play the macro to, based on the parameters present.
[DELAY]	Time, in milliseconds, to wait before performing the next macro command. Example: **[DELAY] 1000** delays the next macro key or command by 1 second.

Recording Macros

▶ **To record a macro:**

1. Start any third-party applications you want to include in the new macro, and then minimize them.
2. Choose the appropriate work flow group in the Desktop Administrator left pane, and then click **Work Flow**.

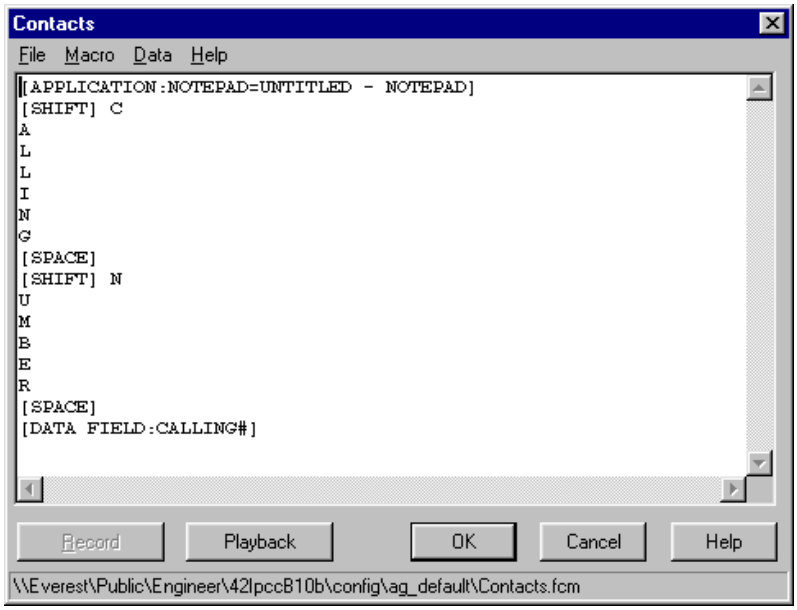
   The Work Flow Setup window appears.
3. Under the Actions pane, click **Add**.

   The Select Action dialog box appears.
4. On the **Run Macro** tab, click **New**.

   The New Macro dialog box appears.
5. Enter a new macro action name, and then click **OK**.

   The Macro Editor window appears (Figure 3-23).

Figure 3-23. Macro Editor window (with a macro script displayed).



6. Click **Record**.

   The Macro Editor window minimizes and the macro recorder starts. Anything you type from now on is entered in the new macro.

7. Maximize the third-party application and begin typing.

   The macro recorder records your keystrokes.

8. If you wish to insert an Agent Desktop data field into the macro, press the Pause Macro hot key (default is F2).

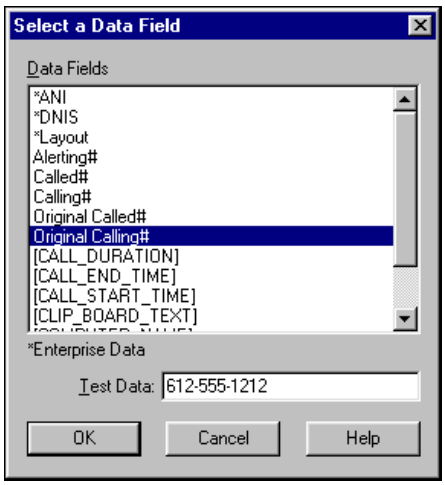
   The Macro Recorder Suspended dialog box appears (Figure 3-24).

Figure 3-24. Macro Recorder Suspended dialog box.

9. Click **Insert Data.**

   The Select a Data Field dialog box appears (Figure 3-25). See "Data Fields" on page 3-43 for more information.

Figure 3-25. Select a Data Field dialog box.



10. Choose the desired data field from the list, enter test data if desired, and then click **OK.**

    The test data you enter is displayed in the application only when the macro is tested using the Playback function.

    The Macro Recording Suspended dialog box appears.

11. Click **Resume Recording** to continue recording the macro.

12. Once you have finished recording the macro, press the macro hot key.

    The Macro Recording Suspended dialog box appears.

13. Click **End Recording**.

    You are returned to the Macro Editor window.

14. You can take the following actions:

    - Click **OK** to save the macro as recorded.

      If there are no errors, the macro is saved and you are returned to the Select Action dialog box.

      If there are errors, the macro editor displays the line and highlights the text in question. Correct it and click **OK** again.

    - Click **Playback** to test the macro.

      If there are errors, the macro editor displays the line and highlights the text in question. Correct it and click Playback again.

If there are no errors, the macro is played back. If it works as you want it to, click **OK** to save it and return to the Select Action dialog box.

To change test data, choose **Data > Change Test Data** in the macro editor and enter new test data.

- Click **Cancel** to cancel the macro.

  The macro is canceled and the Select Action dialog box appears.

Data Fields

The Select a Data Field dialog box (Figure 3-25) enables you to select and insert an Agent Desktop data field into a macro. Access this dialog box either through the Suspend Macro Recording dialog box or from the Data menu in the Macro Editor window.

There are three types of data fields:

- **Standard**. Data from the switch.
- **System**. System data, for example the date and time. These fields are enclosed in square brackets [ ].
- **Enterprise**. Data from the Enterprise server.

Fields marked with an asterisk (*) denote data from CTI Enterprise. If Enterprise is not installed, these fields are not available.

> **NOTE:** When selecting data fields to be used in actions or rules, keep in mind that not every data field is available for every event. For example, the calling number is not available during the Startup event. If an unavailable field is used, <N/A> is displayed in the application the macro pops.

Call Control Actions

Call Control actions assign a call control to an event.

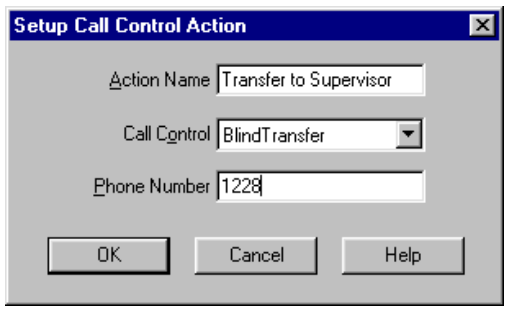
▶ **To set up a new call control action:**

1. In the Work Flow Setup window (Figure 3-18), choose the event to associate with the new action.
2. Under the Actions area, click **Add**.

   The Select Action dialog box appears.
3. Choose the **Call Control** tab, and then click **New**.

   The Setup Call Control Action dialog box appears (Figure 3-26).

Figure 3-26. Setup Call Control Action dialog.



4. Enter the following information, and then click **OK**.
   - A name for the call control action.
   - The type of action. (Select from the drop-down list.)
   - A phone number if required by the type of action. (For example, for Blind Transfer, enter the phone number to which a call is transferred.)

   NOTE: You can add delays in the call control action by inserting commas in the dial string in the Phone Number field. Each comma is approximately a 1.5-second delay. Delays are useful if you must also enter touch tones during the call.

   The Select Action dialog box appears. The new call control action has been added to the list of available actions.

Launch External Application Action

Launch actions start a third-party application in a new window.

To ensure applications are running before macros attempt to use them, start them with launch actions assigned to the Startup event.

NOTE: An application started by a launch action must use the same path on the agent's PC as it does on the administrator's PC or it must be on a network drive, or the launch action will not be successful.

When using launch actions, Agent Desktop can pass parameters, such as command line arguments, in two ways.

The first method is to add parameters after the application path name. For example, the command to start Microsoft Excel and open a spreadsheet named mrmtest.xls is:

```
"c:\program files\excel.exe" "c:\my documents\mrmtest.xls"
```

Program names and command line arguments that contain spaces must be in quotes so that they appear as one argument rather than as multiple arguments.

The second method involves passing data fields as arguments. You can pass any valid data field while launching an application. Remember though, that if a launch action takes place on the Startup event, call data may not be present. Empty or blank data fields will contain the string <NULL>.

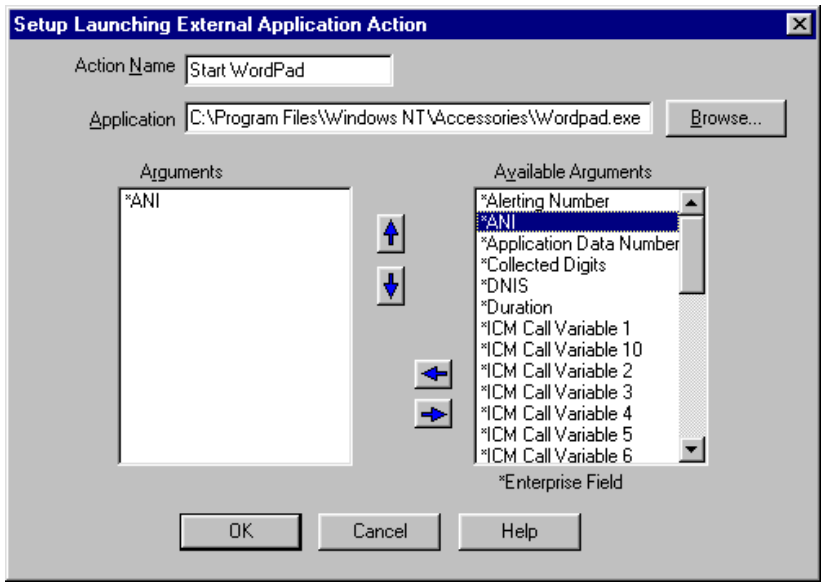
▶ **To set up a new Launch External Application action:**

1. In the Work Flow Setup window (Figure 3-18), choose the event to associated with the new action.
2. Under the Actions pane, click **Add**.

   The Select Action dialog box appears.
3. Choose the **Launch External Application** tab, and then click **New**.

   The Setup Launching External Application Action dialog box appears (Figure 3-27).

Figure 3-27. Setup Launching External Application Action dialog box.



4. Enter a name for the action and enter the path to the desired application's location.

   Make sure the application is located so that it is available to Agent Desktop at runtime.

5. Add any arguments you wish to pass to the application.

   Choose the desired argument in the Available Arguments list, and use the left arrow to add it to the Argument list. Use the up and down arrows to reorder the Argument list.

6. When you have finished entering information, click **OK**.

   The Select Action dialog box appears. The new Launch External Application action has been added to the list of available actions.

For more examples of setting up this type of action, see Chapter 6, "Tutorials."

Agent State Action

Agent State actions enable you to select an agent state to associate with an event.

▶ **To set up a new agent state action:**

1. In the Work Flow Setup window (Figure 3-18), choose the event to associate with the new action.

   Agent State actions may be associated only with Answered and Dropped events.

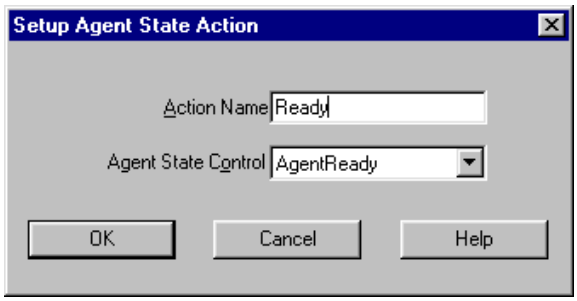
2. Under the Actions pane, click **Add**.

   The Select Action dialog box appears.

3. Choose the **Agent State** tab, and then click **New**.

   The Setup Agent State Action dialog box appears (Figure 3-28).

Figure 3-28. Setup Agent State Action dialog box.



4. Enter a name for the action, select the agent state control from the drop-down list, and then click **OK**.

   The Select Action dialog box appears. The new Agent State action has been added to the list of available actions.

Utility Action

Utility actions set up actions such as starting and stopping recording or sending a predefined, high-priority chat message to the agent's supervisor.

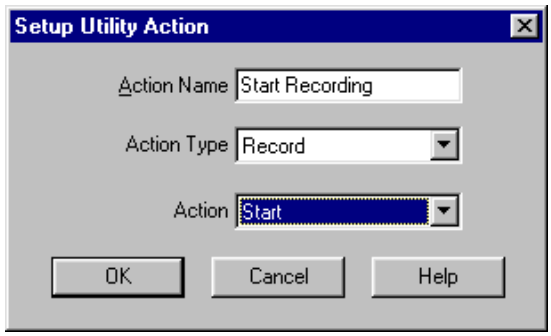
▶ **To set up a new utility action:**

1. In the Work Flow Setup window (Figure 3-18), choose the event to associate with the new action.
2. Under the Actions pane, click **Add**.

   The Select Action dialog box appears.
3. Choose the **Utility Action** tab, and then click **New**.

   The Setup Utility Action dialog box appears (Figure 3-29).

Figure 3-29. Setup Utility Action dialog box.



4. Enter a name for the new action, and select an action type from the drop-down list.
   - If you select **Record** as the action type, select **Start** or **Stop** from the Action field.
   - If you select **HighPriorityChat**, type the message you want to send as the predefined, high-priority chat message in the Message field.

   NOTE: When the dialog box initially opens, only the Action Name and Action Type fields are visible. When you choose the Record action type, the Action field appears. When you choose the High Priority Message action type, the Message field appears.

5. Click **OK**.

   The Select Action dialog box appears. The new Agent State action has been added to the list of available actions.

Enterprise Data

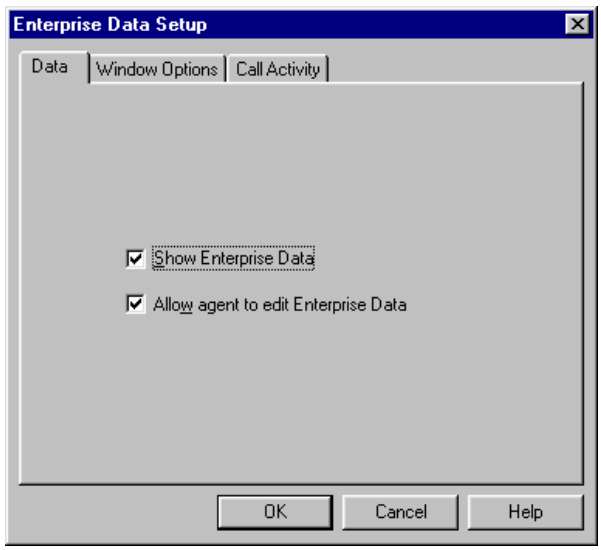
The Enterprise Data Setup dialog box configures whether an agent is able to view the Enterprise Data window, and what information is displayed in that window.

When Enterprise Data is fully enabled, the agent can view both enterprise data and call activity data. See Figure 2-2 on page 2-3 for an illustration of the Enterprise Data window.

Data Tab

The Data tab (Figure 3-30) shows/hides the Enterprise Data window on the agent's desktop and controls whether or not the agent can edit the enterprise data displayed in it.

Figure 3-30. The Data tab.



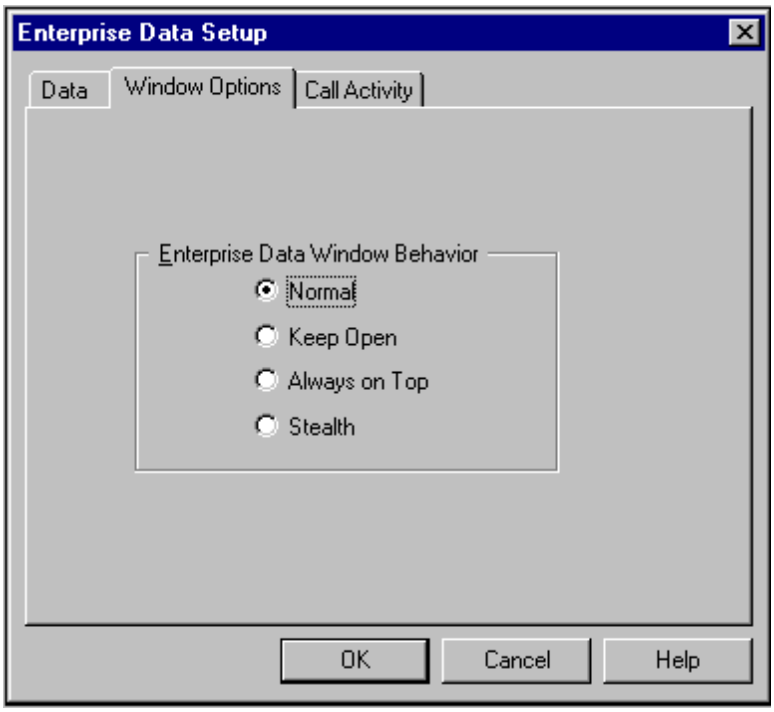
Field	Description
Show Enterprise Data	Check to enable agents to view enterprise data.
Allow agent to edit Enterprise Data	Check to enable agents to edit the enterprise data displayed.

Window Options Tab

The Window Options tab (Figure 3-31) enables you to set the behavior of the Enterprise Data window on the agent's desktop. Options are:

Option	Description
Normal	Enterprise Data appears when calls are present and minimizes when idle.
Keep Open	Enterprise Data is always visible, but may be hidden by other open applications.
Always on Top	Enterprise Data is always visible and on top of other open applications.
Stealth	Enterprise Data appears as an icon in the system tray.

Figure 3-31. The Windows Options tab.



Call Activity Tab

The Call Activity tab enables you to set the thresholds for call duration at a particular type of device (CSQ [contact service queue] and Agent) while a call is in the contact center.

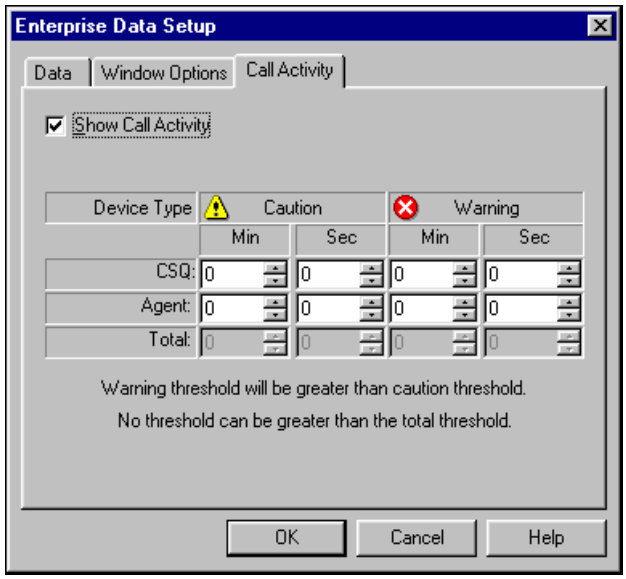
If a call remains at a device longer than the defined Caution or Warning threshold, a Caution or Warning icon is displayed next to the device name in the call activity pane of the Enterprise Data window.

> **NOTE:** You must enter threshold times in the Warning fields before entering threshold times in the Caution fields. Desktop Administrator will not accept data entered in the Caution fields if no data appears in the Warning fields.

> **NOTE:** The Warning threshold value must be greater than the Caution threshold value. If you enter a greater value in the Caution field, Desktop Administrator automatically changes it so that it is one second less than the Warning value.

Check the Show Call Activity check box to enable the agent to view call activity data in the Enterprise Data window.

Figure 3-32. The Call Activity tab.



ICD Configuration

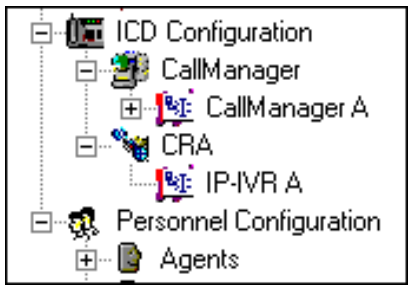
4

Introduction

ICD Configuration enables you to access applications used to administer your contact center. The ICD Configuration node appears in the Navigation tree of the left pane of the Desktop Administrator interface (Figure 4-1).

The nodes under the ICD Configuration node vary according to the makeup of your contact center. Some are set up during installation, and others may be added at a later time.

Figure 4-1. Sample ICD Configuration navigation tree.



Each item underneath a node is a hyperlink to a website or an application.

- The list under **CallManager** contains a link to the Cisco CallManager Administration website for each separate CallManager installation you have.
- The list under **CRA** contains a link to the Cisco Customer Response Application Administration website for each IP IVR installation you have.

When you click one of the hyperlinks, your web browser is launched and you are prompted to enter the user name and password for that particular installation.

Toolbar and Menu Bar

Toolbar

The ICD Configuration toolbar contains four buttons.

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

Button	Name	Description
	New	Adds a new hyperlink to the navigation tree
	Delete	Deletes the selected hyperlink from the navigation tree
	Properties	Displays the selected hyperlink's properties
	About	Displays copyright and version information for ICD Configuration

Menu Bar

ICD Configuration has the following menu options:

Option	Description
File	
New	Adds a new hyperlink
Delete	Deletes a hyperlink
View	Hides/shows the ICD Configuration toolbar
Window	Toggles your control from one pane to the other
Help	Accesses online help and copyright and version information

Managing Hyperlinks

Adding a New Hyperlink

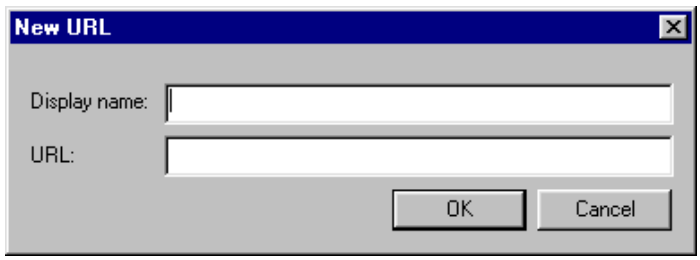
You can add hyperlinks to the navigation tree for easy access to frequently-visited websites.

▶ **To add a new hyperlink:**

1. Click the ICD Configuration node or one of its subnodes, and then click **New** on the toolbar or choose **File > New** on the menu bar.

   The New URL dialog box appears (Figure 4-2).

Figure 4-2. New URL dialog box.



2. Enter a display name and the URL of the destination website, and then click **OK**.

   The new hyperlink appears under the node you selected in Step 1.

Renaming and Deleting Hyperlinks

You can rename and delete hyperlinks on the navigation tree.

▶ **To rename a hyperlink:**

1. Right-click the hyperlink you want to rename.

   The shortcut menu appears.

2. Choose **Rename**, type the new name, and then click outside the hyperlink or press **Enter**.

   The hyperlink is renamed.

▶ **To remove a hyperlink:**

1. Right-click the hyperlink you want to delete.

   The shortcut menu appears.

2. Choose **Delete**.

   The hyperlink is deleted.

Personnel Configuration

5

Introduction

Personnel Configuration enables you to:

- View agent properties
- Assign supervisors to teams
- Set up and maintain teams

You can use Desktop Administrator to set up teams, and to assign agents as supervisors to teams, but you cannot use Desktop Administrator to set up and maintain agents. (Agents are set up and maintained on the ICD server.).

Toolbar and Menu Bar

Toolbar

The Personnel Configuration toolbar contains five buttons.

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

Button	Name	Description
	New	Adds a new team
	Delete	Deletes the selected team
	Web	Opens your web browser and accesses the Cisco Customer Contact Solutions website
	Help	Accesses online help
	About	Displays copyright and version information

Menu Bar

Personnel Configuration offers the following menu bar options:

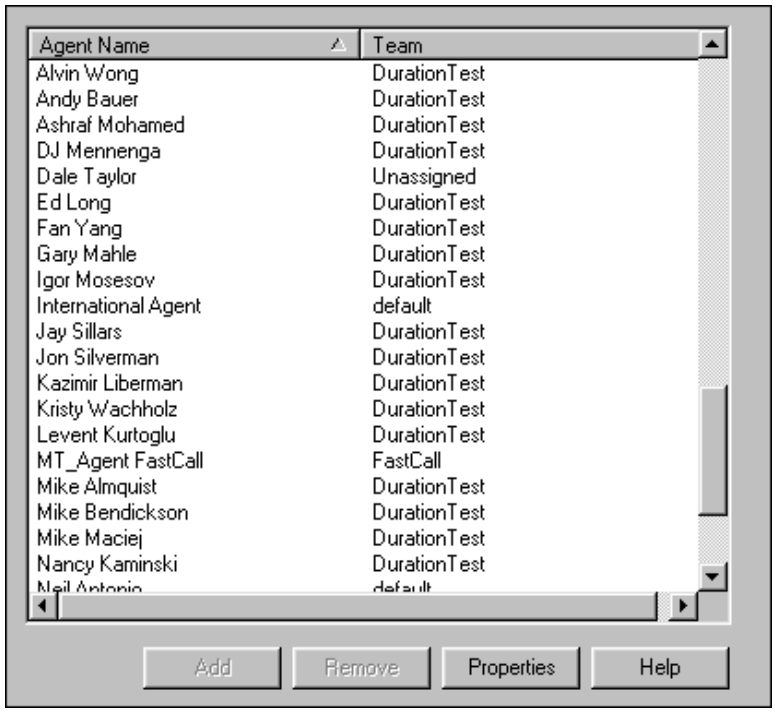
Option	Description
File	
New	Adds a new team
Delete	Deletes the selected team
View	Shows/hides the Personnel toolbar
Window	Toggles your control from one pane to the other
Help	Accesses online help and copyright and version information

Agents

The Agents window (Figure 5-1) displays a list of all the agents configured in the ICD server.

From this window you can view an agent's properties (user ID, password, display name, and team name, all of which are administered in ICD) and change an agent's work flow group affiliation.

Figure 5-1. The Agents window.



▶ **To view agent properties:**

1. Select the agent from the agent list, and then click **Properties**.

   The Agent Properties dialog box appears (Figure 5-2).

2. View the agent properties, and then click **OK**.

▶ **To change an agent's work flow group:**

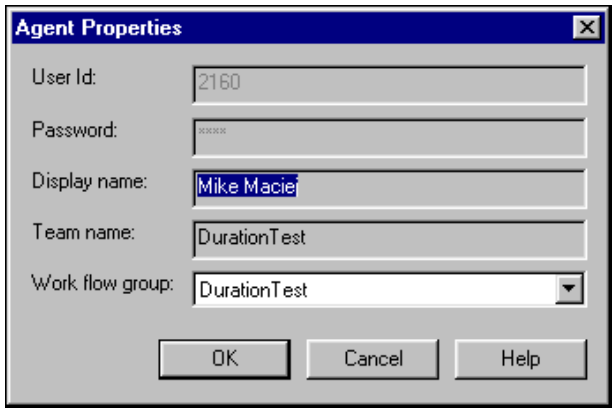
1. Select the agent from the agent list, and then click **Properties**.

   The Agent Properties dialog box appears (Figure 5-2).

2. Select a work flow group from the drop-down list, and then click **OK**.

   The agent is now assigned to a new work flow group.

Figure 5-2. Agent Properties dialog box.



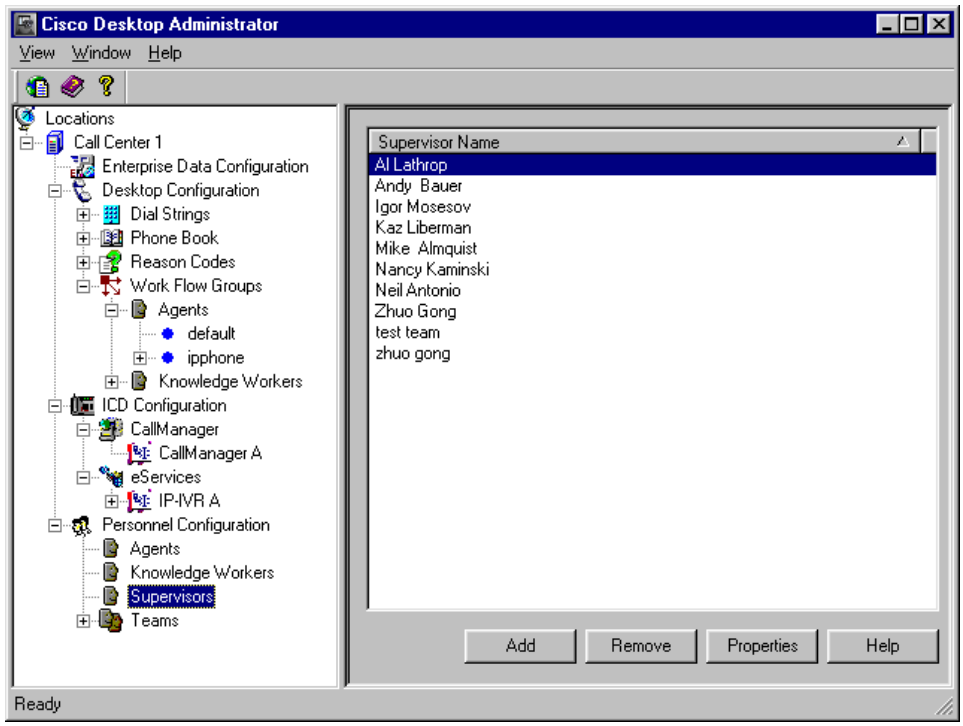
Field	Description
User ID	Agent's Agent Desktop user ID
Password	Agent's Agent Desktop password
Display name	Agent's name
Team name	Team to which the agent is assigned
Work flow group	Work flow group that controls the agent's desktop and work flow configuration

Supervisors

The Supervisors window (Figure 5-3) displays a list of all the supervisors available to be assigned to a team. These supervisors are chosen from the list of agents set up in the ICD server.

You can add or remove a supervisor and view a supervisor's properties from this window.

Figure 5-3. The Supervisors window.



▶ **To add a supervisor:**

1. Click the **Add** button.

   The Supervisor Properties dialog box appears (Figure 5-4).

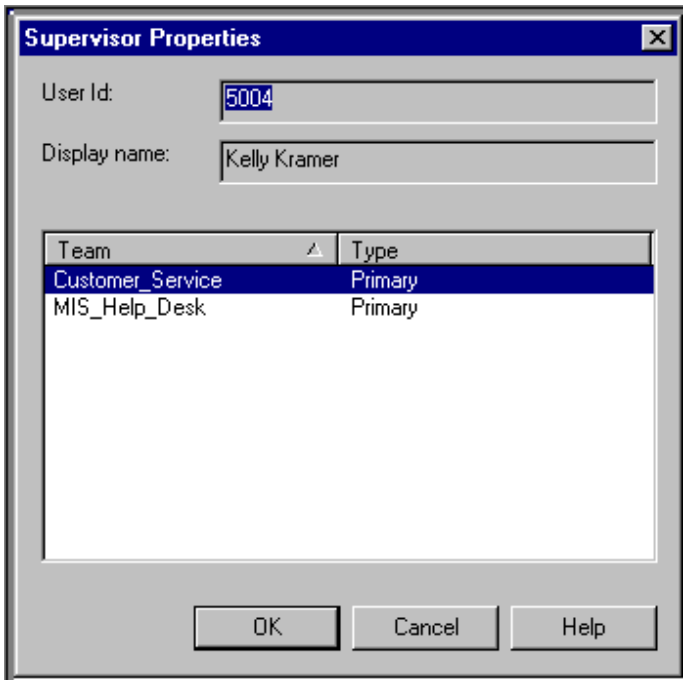
2. Select the new supervisor's user ID from the User ID drop-down list.

   This list contains the user IDs of every agent in the ICD server. When you select the user ID, the agent's name appears in the Display name field.

3. Click **OK**.

   The supervisor's name is listed in the Supervisors window.

Figure 5-4. The Supervisor Properties dialog box.



Field	Description
User ID	Supervisor's Supervisor Desktop user ID.
Display name	Supervisor's name.
Team/Type pane	Team the supervisor is assigned to, and the type (primary or secondary) of supervisor. Supervisors are assigned to teams using the Supervisors tab (see "Supervisors Tab" on page 5-9).

▶ **To remove a supervisor:**

- Choose the supervisor you want to delete from the Supervisors list, and then click **Remove**.

  The agent is removed as a supervisor.

  NOTE: Removing an agent from the list of supervisors does not remove the agent from the ICD server.

▶ **To view a supervisor's properties:**

1. Select the supervisor from the supervisors list, and then click **Properties**.

   The Supervisor Properties dialog box appears (Figure 5-4).

2. View the supervisor's properties, and then click **OK**.

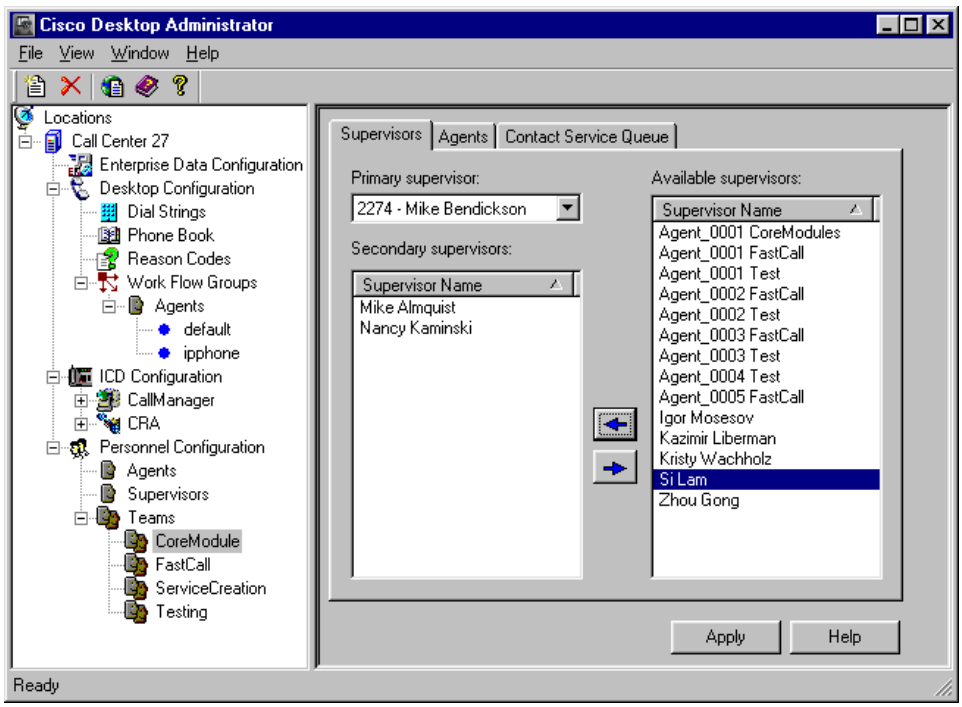
   The Supervisor Properties dialog box closes.

Teams

The Teams window (Figure 5-5) enables you to set up the supervisors, agents, and contact service queues for a particular team.

The lists of agents and contact service queues come from the ICD server; supervisors are set up under the Supervisors node. (See "Supervisors" on page 5-5.)

Figure 5-5. The Teams window.



Adding and Deleting Teams

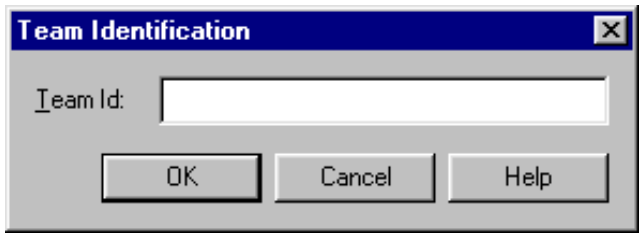
You can add or delete a team to the list displayed under the Teams node.

▶ **To add a new team:**

1. Choose the Team node or any of the subnodes beneath it.
2. Choose **File > New** from the menu bar or click the **New** button on the toolbar.

   The Team Identification dialog box appears (Figure 5-6).

Figure 5-6. The Team Identification dialog box.



3. Enter a name for the new team, and then click **OK**.

   The team name can include alphanumeric characters, spaces, and underscores. Do not use special characters (asterisks, forward or back slashes, etc.).

   The new team is added to the list of teams in the Navigation pane of the Desktop Administrator window. You can now configure the agents, supervisors, and contact service queues for the new team.

▶ **To remove an existing team:**

1. Choose the team you want to delete in the Navigation pane of the Desktop Administrator window.
2. Choose **File > Delete** from the menu bar or click the **Delete** button on the toolbar.

   A dialog box appears asking you to confirm your deletion.
3. Click **Yes** to confirm deleting the team.

   The team is deleted from the list of teams in the left pane.

Supervisors Tab

The Supervisors tab in the Teams window (see Figure 5-5) displays the:

- Primary supervisor
- Secondary supervisors
- Available supervisors

The list of available supervisors includes any agent tagged as a supervisor. (See “Supervisors” on page 5-5.) Supervisors can be assigned to multiple teams.

It is recommended that each team have a primary supervisor, although it is not required. Secondary supervisors are optional.

NOTE: Primary and Secondary Supervisors have the same rights. Both types of supervisors can monitor, record, barge-in, and intercept an agent's calls.

▶ **To set up a team's primary and secondary supervisors:**

1. Select a primary supervisor from the Primary supervisor drop-down list.
2. Select a secondary supervisor from the Available supervisors pane, and then click the left arrow to add the supervisor to the Secondary supervisors pane.

   You can add as many secondary supervisors as you wish.

   Use the right arrow to move a secondary supervisor back to the Available supervisors pane.
3. When you have finished assigning the primary and secondary supervisors to the team as desired, click **Apply**.

   The supervisors are assigned to the team.

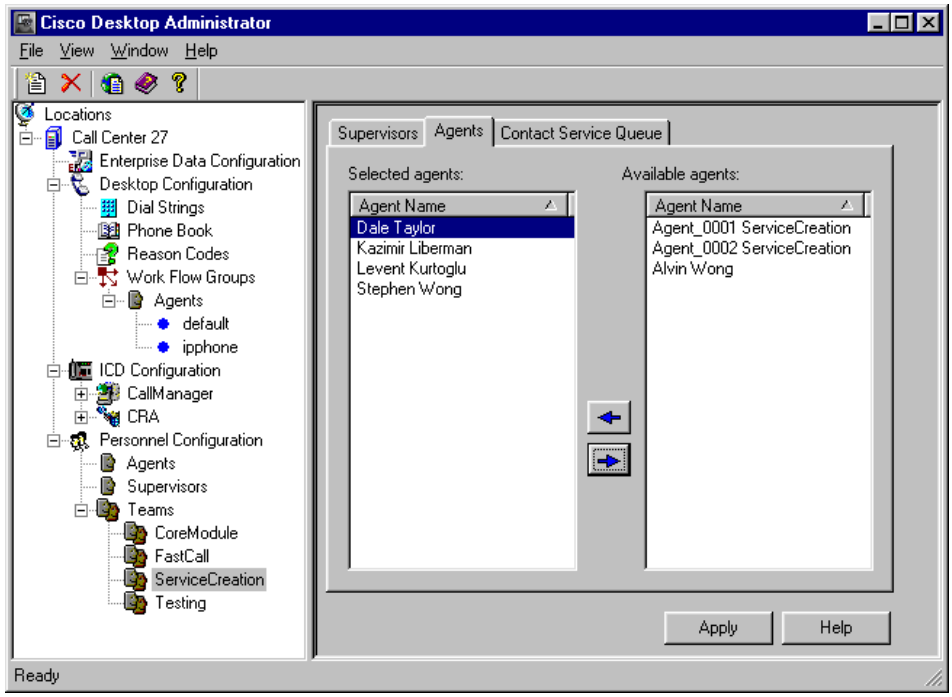
Agents Tab

The Agents tab of the Teams window (Figure 5-7) displays the:

- Agents selected for the team
- Agents available to be assigned to the team

The list of available agents include the agents who have not yet been assigned to a team. An agent can belong to only one team at a time.

Figure 5-7. The Agents tab.



▶ **To add an agent to a team:**

1. Select an agent from the Available agents pane and click the left arrow to add the agent to the Selected agents pane.

   You can add as many agents as you wish.

2. Click **Apply**.

   The agent is added to the team.

▶ **To remove an agent from a team:**

1. Choose the agent to be removed from the Selected agents pane, and then click the right arrow.

   The agent is moved from the left pane to the right pane.

2. Click **Apply**.

   The agent is removed from the team.

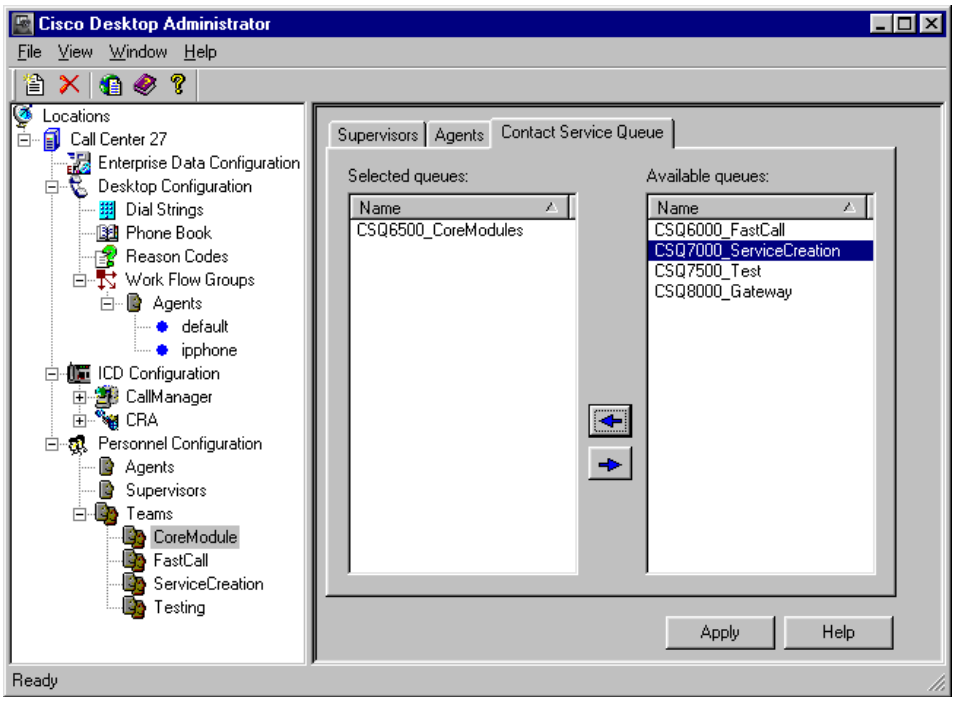
Contact Service Queues Tab

The Contact Service Queues tab of the Teams window (Figure 5-8) displays the:

- Queues assigned to the team
- All available queues

The list of available queues includes every queue set up on the ICD server. Queues can be assigned to multiple teams.

Figure 5-8. The Contact Service Queues tab.



▶ **To add a contact service queue to a team:**

1. Select a contact service queue from the Available queues pane, and then click the left arrow.

   The queue is moved to the Selected queues pane.

   You can add as many queues as desired.

2. Click **Apply**.

   The contact service queue is added to the team.

▶ **To remove a contact service queue from a team:**

1. Select the contact service queue to be removed from the left pane, and then click the right arrow.

   The queue is moved to the right pane.

2. Click **Apply**.

   The contact service queue is removed from the team.

Tutorials

6

Introduction

This chapter shows you how to perform several common tasks. The tasks are presented as tutorials, and each task includes step-by-step instructions, sample screens, and keystroke macro examples.

The tutorials are based on a fictional company called Rock Coast Products. The tutorials are:

- **Setting up an ANI-based screen pop**
  Search a Microsoft Outlook contact list for the ANI.
- **Using a terminal emulator package**
  Use terminal emulation software to find the caller's name based on the ANI and then create an e-mail message using Microsoft Outlook.
- **Setting up a task button to transfer to a specified number**
  Set up a task button that allows agents to transfer calls to their supervisors.
- **Setting up a task button for after-call work**
  Set up a task button that creates a Microsoft Outlook e-mail message for after-call work.
- **Setting up a Launch External Application action**
  Set up an action that automatically launches a third-party application.
- **Using wild card data conditions**
  Use wild card data conditions when setting up rules.

Detailed information about Desktop Administrator's macro recording capabilities is found on page 3-36.

> **NOTE:** Macros may need fine-tuning, depending on the PC used and the third-party software accessed.

Setting Up an ANI-Based Screen Pop

Premise

Rock Coast Products wants to use the ANI as the basis for a screen pop containing customer contact information.

Procedure

Set up a macro to search for the ANI in a Microsoft Outlook 2000 contact list.

> **NOTE:** This example uses Microsoft Outlook 2000 SR-1(9.0.0.3821). If you have a different version, your keystrokes may vary.

1. Open Outlook.
2. In the Navigation pane of Desktop Administrator, click **Desktop Configuration > Work Flow Groups > Agents**, and then select a work flow group.
3. Click **Work Flow**.

   The Work Flow Setup window appears.
4. Select **Ringing** from the Events list box, and then click **New** under the Rules area.

   The New Rule Name dialog box appears.
5. Enter a name (for example, CustContact), and then click **OK**.

   The Work Flow Setup window appears.

   The new rule appears in the Rules list.
6. Select the new rule, and then click **Edit** next to the first Data Field Conditions field.

   The Data Field Conditions dialog box appears.
7. Select **Calling#** from the Data Field drop-down list, check the **Enable Condition** check box, check the **Is Not Empty** data field filter, and then click **OK**.

   The Work Flow Setup dialog box appears.
8. Check the **Enable Rule** check box, and then choose **Any Condition is True**.
9. Click **Add** to create a new action for the event.
10. In the Select Action dialog, Select the Run Macro tab and click **New**.
11. In the New Macro dialog, enter a new macro action name (for example, LookUpPhoneNumber) and click **OK**.

12. In the Macro Recorder dialog, note that the macro name entered in step 5 appears in the title bar. Click **Record**.

    The **Macro Recorder** dialog minimizes.

13. Maximize Outlook and begin typing the following macro keystrokes; the **Macro Recorder** records your keystrokes.

Macro Keystrokes	Action
ALT + V	Access the **View** menu
G	Select **Go to…**
O	Select **Contacts**
ALT + T	Access the **Tools** menu
D	Select **Advanced Find**
ALT + C	Moves the cursor to the **Search for the word(s)** field
Press F2 (or whichever key has been set up as the macro hot key)	Pause macro recording and bring up the **Macro Options** dialog

14. Click **Insert Data** and select the CALLING# data field from the list.

15. Click **Resume Recording** and enter the remaining macro keystrokes, shown below.

Macro Keystrokes	Action
ALT + I	Selects the **In** field
P	Toggles to the **Phone number fields only** option
ALT+N	Clicks the **Find Now** button
Press F2 (or whichever key has been set up as the macro hot key)	Pause macro recording and bring up the **Macro Options** dialog

16. The macro is now complete. To test it, click **Playback**.

    You can make changes to the macro in the edit window, and you can test the changes by clicking **Playback**.

NOTE: You might see multiple [ALT] entries in the macro. These are extraneous and can be deleted. If left in the macro, they will not cause errors.

17. Once you are satisfied with the macro, click **OK** to save and add it to the list of available macros that can be selected as actions.
18. Select the new macro and click **OK**.

    The **Work Flow** dialog appears. Notice that the macro has been added to the list of actions for the selected rule and event.

Macro Text

The following text appears in the macro recorder dialog:

```
[APPLICATION:RCTRL_RENWND32=INBOX - MICROSOFT OUTLOOK]
[ALT] V
G
O
[ALT] T
D
[APPLICATION:RCTRL_RENWND32=ADVANCED FIND]
[ALT] C
[DATA FIELD:CALLING#]
[ALT] I
P
[ALT] N
```

Now you must record a second macro to close the Advanced Find dialog. Make sure to keep Outlook and the Advanced Find dialog open.

1. In the Work Flow Setup dialog, select **Dropped** from the Events list box.
2. Under the Actions list, click **New** to create a new action.
3. In the Select Action dialog, Select the Run Macro tab and click **New**.
4. In the New Macro dialog, enter a new macro action name (for example, CloseAdvFind) and click **OK**.
5. In the Macro Recorder dialog, note that the macro name entered in step 5 appears in the title bar. Click **Record**.

   The **Macro Recorder** dialog minimizes.

6. Maximize the Advanced Find dialog and begin typing the following macro keystrokes; the Macro Recorder records your keystrokes.

Macro Keystrokes	Action
ALT+F	Access the **File** menu
C	Close the **Advanced Find** dialog
Press F2 (or whichever key has been set up as the macro hot key)	Pause macro recording and bring up the **Macro Options** dialog

NOTE: You must add a delay at the beginning of the macro. See “Macro Text” below.

7. Once you have finished recording the macro, press the macro hot key to bring up the Macro Options dialog, and then click **End Recording.**
8. To test your macro, click **Playback**.
9. Once you are satisfied with the macro, click **OK** to save and add it to the list of available macros that can be selected as actions.
10. Select the new macro and click **OK**.

    The **Work Flow** dialog appears. Notice that the macro has been added to the list of actions for the selected rule and event.

Macro Text

The following text appears in the macro recorder dialog:

```
[DELAY] 1500
[APPLICATION:RCTRL_RENWND32=ADVANCED FIND]
[ALT] F
C
```

Using a Terminal Emulator Package

Premise

Rock Coast Products would like to use a terminal emulation program to find the caller's name based on the ANI, and then automatically create an email message each time a call is received.

Steps

This example uses the following software:

- Terminal emulation software: HostExplorer for Windows 95/98, file version 6.1.0.0. from Hummingbird Communications Ltd.
- Email program: Microsoft Outlook 98 (8.5.5104.6)

Use two macros since they can potentially be reused with other actions. It is easier to create and debug small macros and then run them as two actions in a sequence to do larger tasks.

- The first macro accesses the terminal emulation program and copies the caller's name to the clipboard.
- The second macro copies the number from the clipboard and uses it in an email message.

NOTE: Terminal emulation packages can be unpredictable when used with macros. The keyboard/terminal emulation must be correct for the macros to record and play back correctly. Some terminal emulation packages do not have a provision for highlighting and copying text from a screen.

Make sure both programs are running before recording the macros. Also make sure that the terminal program is logged in to a server, and open a text file using Vi (Unix editor). The text file layout is shown below:

```
Phone Number     Name
612-971-2000     Spanlink Communications
612-555-1234     John Smith
612-555-0000     Mary Nelson
612-555-5555     Ned Marvin
```

Set up the Vi macro:

1. Open Vi, log into the server, and open the text file.
2. Run Desktop Administrator, click **Work Flow** and add a new action for the **Ringing** event.
3. In the Select Action dialog, click **New** in the **Run Macro** dialog.

4. Enter a new macro action name (for example, GetNamePutInClipBoard) and click **OK**.
5. In the Macro Recorder dialog, click **Record**. The Macro Recorder dialog minimizes.
6. Maximize Vi, and begin typing the following macro keystrokes; the Macro Recorder records your keystrokes.

Macro Keystrokes	Action
H	Place the cursor in the “home” position
/	Search
F2 (or whichever key has been set up as the macro hot key)	Pause macro recording and bring up the **Macro Options** dialog

7. Select the **Insert Data** option and then select the data field you wish to insert.
8. Click **Resume Recording** in the Macro Options dialog. Begin typing the following keystrokes.

Macro Keystrokes	Action
ENTER	Search Positioned on the **Phone Number** field
/	Search
<SPACE>	Search for a space to get to the **Name** column
ENTER	Search Positioned after the **Phone Number** field
L	Move right one character (over the first space)
L	Move right one character (over the second space)

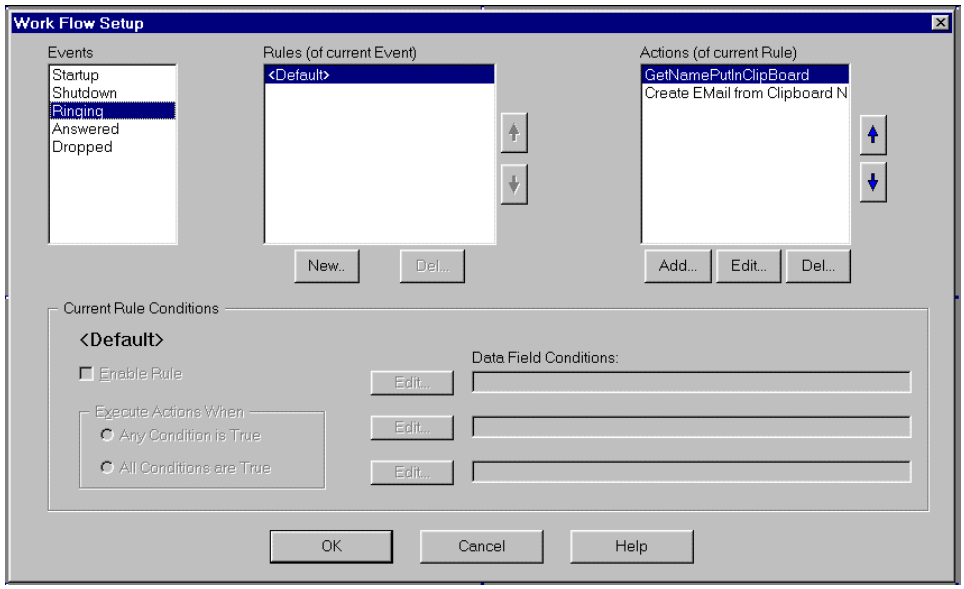
[SHIFT] [CONTROL] [RIGHT-ARROW]	The next three key stroke combinations select the caller's name
[SHIFT] [CONTROL] [RIGHT-ARROW]	
[SHIFT] [CONTROL] [RIGHT-ARROW]	
[ALT] E	Vi **Edit** menu
C	Copy the selected text to the clip board
Press F2 (or whichever key has been set up as the macro hot key)	Pause macro recording and bring up the **Macro Options** dialog

9. Once you have finished recording the macro, press the macro hot key to bring up the Macro Options dialog, and then click **End Recording**.
10. To test your macro, click **Playback**. You can make changes to the macro in the Edit window, and you can test the changes by clicking Playback.
11. Once you are satisfied with the macro, click **OK** to save and add it to the list of available macros that can be selected as actions.
12. Select the new macro and click **OK**.

    The Work Flow dialog appears. Notice that the macro has been added to the list of actions for the selected rule and event.

After you have recorded both macros, notice that both appear in the Work Flow dialog. Make sure that they appear in the order shown in Figure 6-1.

Figure 6-1. Work Flow Setup dialog box.



Vi Macro Text

The following text appears in the macro recorder dialog box:

```
[APPLICATION:HOSTEXPLORER=1 - DEFAULT (DEACON)]
[SHIFT] H
/
[DATA FIELD:CALLING#]
[ENTER]
/
[SPACE]
[ENTER]
L
L
[SHIFT] [CONTROL] [RIGHT-ARROW]
[SHIFT] [CONTROL] [RIGHT-ARROW]
[SHIFT] [CONTROL] [RIGHT-ARROW]
[ALT] E
C
```

Outlook Macro Text

The following text appears in the macro recorder dialog:

```
[APPLICATION:RCTRL_RENWND32=INBOX - MICROSOFT OUTLOOK]
[SHIFT] [CONTROL] B
[APPLICATION:ABCLS=ADDRESS BOOK]
[ALT] Y
[CONTROL] V
[CONTROL] N
```

```
[SHIFT] R
E
G
A
R
D
I
N
G
[SPACE]
[SHIFT] Y
O
U
R
[SPACE]
[SHIFT] C
A
L
L
[SPACE]
O
N
[SPACE]
[SYSTEM FIELD:CALL_START_TIME]
[TAB]
[SHIFT] D
E
A
R
[SPACE]
[CONTROL] V
.
```

Setting Up a Task Button to Transfer to a Specified Number

Premise

Rock Coast Products wants to set up a call control button that will allow agents to easily transfer calls to their supervisor.

Steps

1. In Desktop Administrator, click **Desktop Configuration—Work Flow Groups—Agents** and select a work flow group.
2. Click **User Interface**.
3. On the User Interface Setup window's Toolbar tab, select the task button you want to configure.
4. Select the **Visible** check box.
5. Type a brief hint to describe the action (for instance "Xfer to Super") in the hint field.
6. Click **Add**.
7. In the Select Action dialog, select the Call Control tab and click **New**.
8. In the Setup Call Control Action dialog, enter a name for the action in the **Action Name** field, select the call control type, and enter the supervisor's telephone number in the **Phone Number** field.
9. Click **OK** to save the settings.
10. On the Call Control tab, the new action is highlighted. Click **OK** to return to the User Interface Setup window.
11. In the User Interface Setup window's Toolbar tab, the new action is now associated with the task button you are configuring.
12. Click **OK** to save the changes.

Setting Up a Task Button for After-Call Work

Premise

Rock Coast Products wants to set up a task button that prepares a Microsoft Outlook 2000 email message for after-call work.

This example retrieves customer information (email address, name, and amount of sale) from an Access 2000 database and pastes that information into an Outlook 2000 email.

Assumptions:

- The agent has been looking at the customer's record in the Access database in form view
- Outlook is open on the agent's desktop and is displaying the In Box.
- The agent reviews the automatically-generated email and sends it manually.

Steps

1. In Desktop Administrator, click **Desktop Configuration—Work Flow Groups—Agents** and select a work flow group.
2. Click **User Interface**.
3. On the Use Interface Setup window's Toolbar tab, select the task button you wish to configure.
4. Select the **Visible** check box.
5. Type a brief hint to describe the action (for instance "After Call Email") in the hint field.
6. Click **Add**.
7. In the Select Action dialog, select the Run Macro tab and click **New**.
8. In the New Macro dialog, type a name for the new macro (for instance, "AfterCallEmail") and click **OK**.

9. In the Macro Recorder dialog, click **Record** to start recording the macro.

Macro Keystrokes	Action
(maximize Access)	
[HOME]	Press Home to position the cursor in the first field in the form.
[TAB]	Press the tab as many times as needed to go to the email address field.
[CONTROL] C	Copy the email address.
(maximize Outlook)	
[CONTROL] N	Open a blank email message.
[CONTROL] V	Paste the email address in the To: field in the email message.
[TAB]	Tab down to the Subject line.
{TAB}	
[SHIFT] Y	Type “Your Order” in the Subject line.
O	
U	
R	
[SPACE]	
[SHIFT] O	
R	
D	
E	
R	
[TAB]	Tab to the body of the message.

Macro Keystrokes	Action
[SHIFT] D	Type the salutation "Dear "
E	
A	
R	
[SPACE]	
(maximize Access)	
[TAB]	Tab as many times as needed to get to the Name field.
[CONTROL] C	Copy the customer's name.
(maximize Outlook)	
[CONTROL] V	Paste the customer's name after the salutation.
[ENTER]	Press the Return key twice to start a new line for the body of the message.
[ENTER]	
[SHIFT] T	Type the message: "Thank you for your order in the amount of ".
H	
A	
N	
K	
[SPACE]	
Y	
O	
U	
[SPACE]	
F	
O	

Macro Keystrokes	Action
R	
[SPACE]	
Y	
O	
U	
R	
[SPACE]	
O	
R	
D	
E	
R	
[SPACE]	
I	
N	
[SPACE]	
T	
H	
E	
[SPACE]	
A	
M	
O	
U	
N	

Macro Keystrokes	Action
T	
[SPACE]	
O	
F	
[SPACE]	
(maximize Access)	
[TAB]	Tab as many times as needed to get to the Amount of Sale field.
[CONTROL] C	Copy the amount of sale.
(maximize Outlook)	
[CONTROL] V	Paste the amount of sale in the body of the message.
.	Add a period to the sentence.
[SPACE]	Type "Your order is in the mail." to finish the email.
[SHIFT] Y	
O	
U	
R	
[SPACE]	
O	
R	
D	
E	
R	
[SPACE]	
I	

Macro Keystrokes	Action
S	
[SPACE]	
I	
N	
[SPACE]	
T	
H	
E	
[SPACE]	
M	
A	
I	
L	
.	

10. Once you have finished recording the macro, press the macro hot key to display the Macro Options dialog, and then click **End Recording.**
11. To test your macro, click **Playback**. You can make changes to the macro in the edit window and then test them by clicking **Playback** again.

    TIP: To slow down the macro so you can watch the steps, insert the command [DELAY] 1000 before and after the commands for maximizing Outlook and Access. This will help you debug the macro. For instance:

    ```
    [DELAY] 1000
    [APPLICATION:OMAIN=MICROSOFT ACCESS - [CUSTOMERS :
    FORM]
    [DELAY]1000
    ```

12. Once you are satisfied with the macro, click **OK** to save and add it to the list of available macros that can be selected as actions.
13. On the Run Macros tab, the new macro is highlighted. Click **OK** to return to the User Interface Setup window.

14. In the User Interface Setup window's Toolbar tab, the new macro action is now associated with the task button you are configuring.
15. Click **OK** to save the changes.

Sample Macro Text

The following text appears in the macro recorder dialog:

```
[APPLICATION:OMAIN=MICROSOFT ACCESS - [CUSTOMERS :
   FORM]
[HOME]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[CONTROL] C
[APPLICATION:RCTRL_RENWND32=INBOX - MICROSOFT OUTLOOK]
[CONTROL] N
[APPLICATION:RCTRL_RENWND32=UNTITLED - MESSAGE (PLAIN
   TEXT) ]
[CONTROL] V
[TAB]
[TAB]
[SHIFT] Y
O
U
R
[SPACE]
[SHIFT] O
R
D
E
R
[TAB]
[SHIFT] D
E
A
R
[SPACE]
[APPLICATION:OMAIN=MICROSOFT ACCESS - [CUSTOMERS :
    FORM]
```

```
[HOME]
[TAB]
[CONTROL] C
[APPLICATION:RCTRL_RENWND32=YOUR ORDER - MESSAGE (PLAIN
    TEXT) ]
[CONTROL] V
,
[ENTER]
[ENTER]
[SHIFT] T
H
A
N
K
[SPACE]
Y
O
U
[SPACE]
F
O
R
[SPACE]
Y
O
U
R
[SPACE]
O
R
D
E
R
[SPACE]
I
N
[SPACE]
T
H
E
[SPACE]
A
M
I
[BACKSPACE]
O
U
N
T
[SPACE]
```

```
O
F
[SPACE]
[APPLICATION:OMAIN=MICROSOFT ACCESS - [CUSTOMERS :
   FORM]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[TAB]
[CONTROL] C
[APPLICATION:RCTRL_RENWND32=YOUR ORDER - MESSAGE (PLAIN
   TEXT) ]
[CONTROL] V
.
[SPACE]
[SHIFT] Y
O
U
R
[SPACE]
O
R
D
E
R
[SPACE]
I
S
[SPACE]
I
N
[SPACE]
T
H
E
[SPACE]
M
A
I
L
.
```

Setting Up a Launch External Application Action

Premise

Rock Coast Products wants to set up a task button that automatically launches a third-party application.

Steps

In this example you set up an action that launches Microsoft WordPad and then associate the action with a task button on the agent's toolbar.

1. In Desktop Administrator, click **Desktop Configuration—Work Flow Groups—Agents** and select a work flow group.
2. Click **User Interface**.
3. On the User Interface Setup window's Toolbar tab, select the task button you want to configure.
4. Select the **Visible** check box.
5. Type a brief hint to describe the action (for instance, "WordPad") in the hint field.
6. Click **Add**.
7. In the Select Action dialog, select the Launch External Application tab and click **New**.
8. In the Setup Launching External Application Action dialog, enter a name for the action in the **Action Name** field and browse to the application's executable (Wordpad.exe) in the **Application** field. Remember that the application should be located on a network drive so it is accessible to all agents. If you must use an application located on the agent's PC, make sure that the application is accessible by an identical path on each agent's PC.
9. If you want, add any of the available arguments to pass to WordPad. Select the arguments from the right-hand Available Arguments pane and use the left and right arrows to add or remove them to the left-hand Arguments pane. Use the up and down arrows to rearrange the order in which they will appear.
10. Click **OK** to return to the Launch External Application tab with the new action highlighted in the list of actions.
11. Click **OK** to return to the User Interface Setup window.
12. In the User Interface Setup window's Toolbar tab, the new action is now associated with the task button you are configuring.
13. Click **OK** to save the changes.

Using Wild Card Data Conditions

Premise

Rock Coast Products is located in a city with two neighboring area codes. The east metro area code is 651 and the west metro area code is 612. Rock Coast's Customer Service Division has an agent who assists east metro callers and one who assists west metro callers.

If an east metro caller dials the main Customer Service number, Rock Coast wants that call directed automatically to the appropriate agent.

Steps

To do this, Rock Coast sets up rules using the data conditions **Is in the List** and **Is not in the List**. These data conditions only return as true if there is an exact string match.

Entering hundreds or even thousands of telephone numbers into a list is not feasible, so Rock Coast uses wild card data conditions. This is similar to using the Find tool in Windows—you can enter part of a string or a whole string to find what you're looking for.

Valid wild card strings are:

String	Description
ABC?	Examples of matches: ABCD, ABCF, ABC1 The fourth character can be anything, but there must be only four characters in the string and the first three must be ABC.
??ABC	Examples of matches: 12ABC, AAABC, ##ABC The first two characters can be anything, but the last three must be ABC and there must be five characters in the string.
ABC*	Examples of matches: ABCD, ABCDEF, ABC The fourth through nth characters can be anything, but the first three characters much be ABC.

Use these steps to set up a wild card data condition that will transfer calls from the 651 area code to the east metro agent:

1. In Desktop Administrator, click **Desktop Configuration—Work Flow Groups—Agents** and select a work flow group.
2. Click **Work Flow**.
3. In the Work Flow Setup window, select the **Ringing** event.

4. Under the Rules pane, click **New**.
5. Create a new rule named **East Metro**.
6. In the Work Flow Setup dialog, note that the new rule appears in the Rules list. With the new rule highlighted, click **Edit** next to the first Data Field Conditions field.
7. Select **Calling#** from the Data Field drop-down list.
8. Select **Enable Condition**.
9. Select **Is in the list**.
10. Add the wild card data condition **651*** to the list.
11. Click **OK**.
12. Select **Enable Rule**.
13. Click **OK**.

[note: ask Kim about adding an action here (called Redirect)? Do we have to do a blind transfer to the East Metro agent's extension?]

Glossary

7

– A –

ACD

See automatic call distribution.

action

An occurrence that takes place when a rule is met. Actions include: running a macro, launching a third-party application, performing a call control, setting an agent state, or running a utility. More than one action can take place as a result of meeting a rule.

administration, central

The administration of groups of agents from a central PC.

administration, local

An option that allows an agent to program or administer some aspects of his or her Agent Desktop application.

agent

The person who interacts with customers in a contact center.

Agent Desktop

The Cisco desktop application used by a contact center agent to handle customer calls.

agent state

An agent's current status. Possible statuses are: Ready, Not Ready, Work, Reserved, Talking, Logged In, and Logged Out.

Agent State action

An action type that changes an agent's agent state.

agent state buttons

The buttons on the Agent Desktop interface used to change the agent's current status. Available buttons are: Logged In, Logged Out, Ready, Not Ready, and Work.

Always on Top

A display mode in which the interface is always on top of all other windows and does not minimize.

Always Open

A display mode in which the interface is always visible, but may be hidden by other open applications.

ANI

See automatic number identification.

Answer/Drop button

One of the call control buttons on the Agent Desktop interface. Clicking this button answers or drops the selected call.

Answered event

The event that occurs when the agent answers the phone.

appearance

A PBX line or extension that is on a multi-button–key telephone. For example, extension 445 appears on three-key systems.

area code

A 3-digit code designating a toll center in the United States and Canada.

automatic call distribution (ACD)

Optional software that resides on the PBX. Its role is to monitor various parameters within the system and call center and to intelligently route calls based on that information.

automatic number identification (ANI)

A series of digits at the front of a phone call that delivers the billing number (which is not necessarily the phone number) of the caller.

– B –

barge-in

A feature in Supervisor Desktop that allows a supervisor to forcibly join an agent's call with a customer.

Barge-In button

The button on the Supervisor Desktop interface that allows a supervisor to forcibly join an agent's call with a customer.

bridged appearance

A situation in which two devices share the same phone number (for example, a secretary whose phone can also answer the boss's phone).

– C –

call activity data

The information displayed in the Enterprise Data window documenting the length of time a call is at a particular type of device or agent within the call center.

call center

A location where calls are made and answered. A call center typically has numerous agents and an automatic call distributor.

call control

The action of changing the state of a call, for instance, making, answering, transferring, or dropping a call.

Call Control action

An action that performs a call control function triggered by an event meeting a rule. Call control actions vary according to switch type.

call control buttons

The buttons on the Agent interface that the agent uses to perform phone functions. Call control actions vary according to switch type.

call history

See call activity data.

call log

The record of calls made and received by a desktop while running Agent. This log is viewable in the Call Log Viewer within Agent Desktop.

call routing

The automatic sending of calls to the desired destination, such as an extension or a queue.

call treatment

The handling of calls, for example, queuing the call or playing announcements to the caller.

Call/Chat

The application that runs on the agent desktop. Call/Chat displays text messages and conference call information, and enables the agent to send messages to other agents and the supervisor.

Call/Chat server

A server program that handles the passing of data messages between agents and supervisors.

caller input

Touchtone data entered by the caller in response to prompting.

CallManager

A Cisco software-based voice-over IP telephone switch.

central office (CO)

The telephone company building where subscribers' lines are joined to switching equipment that connects subscribers to each other, both locally and long distance.

chat name

The name by which an agent is known in the Call/Chat application.

chat session

A written exchange between agents or between agent and supervisor using the Call/Chat application.

CO

See central office.

computer telephony integration (CTI)

The connection of a computer with a telephone switch that allows the computer to issue commands and receive event information for calls and agents.

Conference button

One of the call control buttons on the Agent Desktop interface. Clicking this button enables you to set up a conference call.

configuration file

The computer file that stores the settings of an application.

contact center

An expansion of a call center, so that it can make and receive not only phone calls, but email, faxes, web chat messages, and so on.

CORBA

Common Object Request Broker Architecture. An architecture and specification for creating, distributing, and managing distributed program objects in a network. It allows programs at different locations and developed by different vendors to communicate in a network through an interface broker.

country code

The 1–3 digit code that, in the world numbering plan, identifies each country or integrated numbering plan in the world.

CTI

See computer telephony integration.

– D –

data field

A piece of information about a phone call that is available for display in the Agent Desktop interface.

data field condition

A logical statement about call data that evaluates as either true or false.

data router

In networks, a device that connects any number of IP LANs.

data switch

In networks, a device that filters and forwards packets between LAN segments.

database

A collection of data structured and organized in a disciplined fashion so that information of interest can be accessed quickly.

deflected call

A ringing call that is redirected to another extension without being answered first.

delimiter

A word or character that marks the beginning or end of a segment of data.

Desktop Administrator

The application used to administer the Desktop product suite.

device

A unit (for example, a telephone) connected to the telephone system.

Dial Pad

The soft phone screen that enables an agent to dial a number.

dial plan

A description of the dialing arrangements for customer use on a telephone network. For example, the local access code, local area code, etc.

dialed number information service (DNIS)

A telephony network feature that provides the number the caller dialed.

Directory Services server

An LDAP server. All other servers in the Desktop Product Suite system register with the Directory Services server at startup. Clients use this server to request information about other Desktop Product Suite components.

disconnect

The breaking or release of the connection between two telephones. A caller is disconnected when the other party hangs up on the caller.

DNIS

See dialed number information service.

drop

To hang up or disconnect a phone call.

Dropped event

An event which indicates a call is disconnected.

DTMF

See Dual Tone Multi-Frequency.

dual tone multi-frequency (DTMF)

The term for touchtone dialing. In DTMF, when you touch a button on a push button pad, it makes a tone which is actually a combination of two tones, one high frequency and one low frequency. These are the beeps you hear when you dial a phone number.

duplex environment

An operating environment that contains a primary and secondary server. If the primary server fails, the secondary server takes over.

– E –

enterprise data

A piece of data available to the Desktop Product Suite via the Enterprise server.

Enterprise Data

The application used in conjunction with Agent Desktop to display the additional enterprise data associated with a call.

Enterprise server

A server program that tracks calls in the system. It is used to attach IVR-collected data to a call in order to make real-time call activity data available at the agent desktop.

error code

A system or application-generated code that is displayed when a program error occurs.

Ethernet

A local area network standard. Like other LAN technologies, Ethernet is used to connect computers, printers, workstations, terminals, servers, and other devices within the same building or campus.

event

An occurrence at the agent desktop. Events include: startup, shutdown, ringing, answered, and dropped.

extension

The internal telephone number at the agent desktop.

external application

A software application not belonging to the Desktop Product Suite.

– F –

feature

The capability of a product to perform one or many tasks, for example, running macros, performing call control, or launching external applications.

– H –

Hold/Unhold button

One of the call control buttons on the Agent Desktop interface. Clicking this button puts the selected call on hold or takes it off hold.

host

A server connected to a network.

– I –

ICD

See integrated contact distribution.

Install Manager

The program that helps you install the Desktop Product Suite on your system.

integrated contact distribution (ICD)

A voice-over IP ACD that works with CallManager. It has automated voice call distribution and contact interaction management for up to 75 concurrent agents. It integrates with Cisco IP IVR and IP Automated Attendant applications.

interactive voice response (IVR)

The use of a computer to interact verbally via a telephone with a caller. The computer plays announcements and questions to the caller, and the caller replies by entering information via touch tones, a rotary dial, or by speaking. "IVR" and "VRU" are often used interchangeably. *See* voice response unit (VRU).

intercept

An intercept occurs when a supervisor uses the Intercept button to force a transfer from an agent to the supervisor.

Intercept button

The button on the Supervisor Desktop interface that allows a supervisor to force a call to be transferred from an agent to the supervisor.

Internet protocol (IP)

This protocol specifies the format of packets, also called datagrams, and the addressing scheme. Most networks combine IP with a higher-level protocol called transport control protocol (TCP), which establishes a virtual connection between a destination and a source.

IP by itself is something like the postal system. It allows you to address a package and drop it in the system, but there's no direct link between you and

the recipient. TCP/IP, on the other hand, establishes a connection between two hosts so that they can send messages back and forth for a period of time.

IP

See Internet protocol.

IP address

The Internet protocol address of a device.

IP phone

A phone that enables you to move multimedia traffic over any network that uses Internet protocol (IP).

IP port

In TCP/IP and UDP networks, an endpoint to a logical connection.

IP IVR

Cisco IP IVR is an IP-powered interactive voice response application that provides an open and extensible foundation for the creation and delivery of IVR solutions via Internet technology. It automates the handling of calls by autonomously interacting with users.

IVR

See interactive voice response.

– L –

LAN

See local area network.

Launch External Application action

An action that starts an external application from within Agent Desktop.

LCC

See logical contact center.

LDAP

See lightweight directory access protocol.

License Administration

The application used to update the number of seats purchased in a user's Desktop Product Suite.

lightweight directory access protocol (LDAP)

LDAP defines a standard manner of organizing directory hierarchies and a standard interface for clients to access directory servers.

local area network (LAN)

Two or more computers, and other devices, connected by cable, generally within the same building or campus.

local extension

See extension.

logical contact center (LCC)

The root of the Directory Services tree where Desktop Product Suite applications query for information. It is used to segregate logically separate call centers within the Directory Services server.

Login/Logout button

One of the Agent State buttons on the Agent Desktop interface. It is used to log the agent in or out of the ACD system.

– M –

macro

A series of prerecorded commands that accomplish a task.

macro hot key

In Desktop Administrator, the key used to pause the recording of a macro and to display the macro recording menu.

macro recorder

The feature in Desktop Administrator used to record a macro.

Make Call button

One of the call control buttons on the Agent Desktop interface. Clicking this button displays the dial pad so that the agent can make a call or use the phone book.

marquee message

A message the supervisor can create to scroll continuously across agents' Call/Chat windows for a set length of time to communicate important information.

– N –

Normal

A display mode in which the interface appears when calls are present and minimizes when idle.

– O –

outside line access code

The access code or series of touch tones that tells the switch that the following numbers identify a phone number outside the switch.

– P –

pane

Section of an application window.

password

A series of alphanumeric characters required to log onto an application or server.

PBX

See private branch exchange.

phone book

In Agent Desktop, any one of the stored phone directories. Agent Desktop contains global phone books as well as a personal phone book.

PIM

See protocol independent multicast.

plain old telephone service (POTS)

The basic service supplying standard telephones, telephone lines, and access to the public switched network.

port

See IP port.

POTS

See plain old telephone service.

primary server

In a duplex environment, the main server used. If the primary server fails, the secondary server takes over.

private branch exchange (PBX)

A private telephone network used within an enterprise. Users of the PBX share a certain number of outside lines for making telephone calls external to the PBX.

protocol independent multicast

Multicast routing architecture that allows the addition of IP multicast routing on existing IP networks.

PSTN

See public switched telephone network.

public network

A network operated by common carriers or telecommunications administrations for the provision of circuit switched, packet switched, and leased-line circuits to the public.

public switched telephone network (PSTN)

Refers to the world's collection of interconnected voice-oriented public telephone networks, both commercial and government-owned.

– R –

Recording and Statistics server

A server program that logs agent state changes, calls, and records conversations.

Ready button

One of the Agent State buttons on the Agent interface. It is used to put the agent into the Ready state (ready to receive calls).

real-time transport protocol (RTP)

An Internet protocol for transmitting real-time data such as audio and video.

recent call list

A list of an agent's 100 most recently made phone calls, automatically kept on the Dial Pad screen.

remote supervision

The ability to silently monitor agents who are outside of a supervisor's network. For instance, a supervisor on a network in Minneapolis can remotely supervise call center agents on a different network in Miami.

Ringing event

The event that occurs when the phone rings. *See* Event.

RTP

See real-time transport protocol.

rule

A rule is a set of 1–3 data field conditions. If any or all the conditions that constitute the rule are evaluated as true, then the rule is met. Rules that are met trigger events and actions.

Run Macro action

An action that starts and runs a macro.

– S –

screen pop

The delivery of caller-specific information onto the agent's computer screen ("populating" the screen).

seat

An instance of Agent Desktop, Supervisor Desktop, or other Desktop Product Suite applications. A customer purchases a license for a number of seats.

secondary server

In a duplex environment, the backup server. If the primary server fails, the secondary server takes over.

shortcut key

A keyboard key or key combination (also known as a "hotkey" or "keyboard accelerator key") that invokes a particular command that is generally faster to use than clicking the mouse through a menu.

Shutdown event

The event that occurs when Agent Desktop shuts down. *See* event.

skill

An ability (expertise in a particular type of software, fluency in a foreign language, for example) of a call center agent. Calls can be routed based on agent skills (skill-based routing) for better customer service.

soft phone

A software phone, such as Agent Desktop's dial pad.

Startup event

The event that occurs when Agent Desktop starts up. *See* event.

status bar

The area on the Agent Desktop interface that displays the status of a selected call and any messages generated by the software or hardware.

Stealth

A display mode in which an application appears as an icon in the system tray unless maximized by the agent.

suite

A collection of software tools.

supervisor

The leader and/or manager of a team of agents.

Supervisor Desktop

The application used by contact center supervisors to manage agent teams in real time.

– T –

task button

One of a series of up to 10 buttons on the Agent Desktop interface to which actions can be assigned.

team

A group of agents who report to the same supervisor.

threshold

The acceptable amount of time a call can remain at a particular device or call center. Caution or warning icons are displayed in the Enterprise Data window when thresholds are met or exceeded for a call.

touch tones

See dual tone multi-frequency.

transfer

A phone switch feature that allows moving a call from one extension to another.

Transfer button

One of the call control buttons on the Agent Desktop interface. Clicking this button displays the dial pad to transfer the call.

transfer, blind

A transfer in which the active call is transferred to the third party without ensuring that the transfer is successful (picked up at the other end).

transfer, supervised

A transfer in which you speak to the third party to whom the call is being transferred before connecting the active call, in order to confirm that the transfer can be made successfully.

– U –

UDP

See user datagram protocol.

user datagram protocol (UDP)

A part of the IP protocol suite. It was created to provide a way for applications to access the connectionless features of IP. It provides for exchange of datagrams without acknowledgements or guaranteed delivery.

user ID

An identifier that designates a particular user and that is required to log into an application or server.

user interface

An application's look and feel to the user.

– V –

virtual private network (VPN)

A network created by renting or acquiring some part of someone else's network (a phone company, an Internet provider) and used to communicate between a company's offices.

voice gateway router

A combination of hardware and software that links a POTS telephone network to an IP data network.

voice monitoring

The ability of a supervisor to monitor an agent's phone conversations without being heard and without letting the agent knowing it is happening.

voice-over IP (VoIP)

A category of hardware and software that enables people to use Internet protocol as the transmission medium for telephone calls.

voice packet

A digitized sample of a voice conversation sent over a network.

voice response unit (VRU)

The computer used to interact verbally via a telephone with a caller. The computer plays announcements and questions to the caller, and the caller replies by entering information via touch tones, a rotary dial, or by speaking. "VRU" and "IVR" are often used interchangeably. *See* interactive voice response (IVR).

Voice-over IP Monitor server

A server program used to enable supervisors to silently monitor agents.

VoIP

See voice over IP.

VPN

See virtual private network.

VRU

See voice response unit.

– W –

wild card

Special characters used to represent one or more characters in a string. An asterisk (*) represents several characters and a question mark (?) represents a single character.

window behavior

A feature that allows the user to control how the Desktop Product Suite application window acts on screen. *See* Always on Top, Keep Open, Normal, and Stealth.

work flow

A sequence of actions that takes place when specific event/rule criteria are met.

work flow group

A group that shares a common set of work flows.