



## **Cisco Agent Desktop User Guide**

CAD 6.6 for Cisco Unified Contact Center Express Release 7.0  
Cisco Unified Communications Manager Edition  
revised March 2011

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*Cisco Agent Desktop User Guide*

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## Contents

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# Cisco Agent Desktop User Guide

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## Introduction

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

Agent Desktop provides call control capabilities—such as call answer, hold, conference, and transfer, and ACD state control—ready/not ready, wrap up, etc. Customer information is presented to the agent through an enterprise data window and an optional screen pop. Agents can also answer customer e-mail using the optional Agent E-Mail feature. The optional integrated browser enables agents to access intranet and internet web pages to enhance their ability to assist customers. The optional integration with Cisco Unified Presence makes it possible for agents to send instant messages to non-agent subject matter experts to help them assist customers.

## What's New In This Release

Agent Desktop 6.4 includes these new features:

- Multiple browser tabs in the integrated browser
- Optional integration with Cisco Unified Presence
- Agent E-Mail
- Accessibility improvements
- Improved grid controls
- Recording notification on workflow-initiated recording
- Persistent storage of dial pad data

## Agent Desktop Feature Levels

There are two feature levels of Agent Desktop: Enhanced and Premium.

The following chart outlines the features available at each feature level. All features not listed here are present in both versions.

**Table 1.** Agent Desktop feature levels

Feature	Enhanced	Premium
Task buttons	x	x
Event-triggered work flows	x	x
Enterprise data thresholds	x	x
Agent-initiated chat	x	x
Automated recording (part of a work flow)	x	x
Agent workflow timer, HTTP, and IPC actions		x
Call control actions		x
Integrated multi-tabbed browser		x
Agent E-Mail		x
Wrap-up data	x	x
Reason codes	x	x
Cisco Unified CCX Preview Outbound Dialer		x
Cisco Unified Presence integration	x	x

## Cisco IP Communicator

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

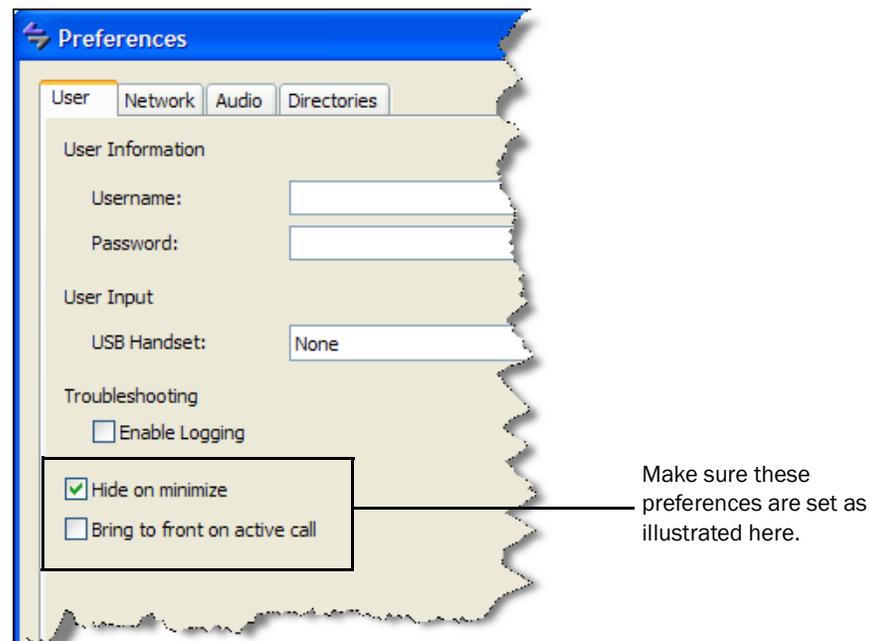
You must start IP Communicator manually (it does not start automatically when you start Agent Desktop). To conserve system resources, keep IP Communicator minimized as much as possible and use the Agent Desktop interface for call control.

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

**To make sure IP Communicator remains minimized when a call is received:**

1. Start IP Communicator.
2. Right-click anywhere on the interface to display a popup menu, and then choose Preferences. The Preferences dialog box appears (Figure 1).

**Figure 1.** IP Communicator Preferences dialog box



3. On the User tab, clear the Bring to front on active call check box (the default setting) and select the Hide on minimize check box.
4. Click OK.

## Automated Updates

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CAD enables your administrator to update all instances of the CAD desktop applications automatically to a newer version. It also ensures that the correct version of Java Runtime Environment (JRE) is installed on your computer.

### CAD Desktop Applications

Every time you launch Agent Desktop, the software checks to see if there is an updated version available, or if there was a system configuration change that requires a Windows registry change. If either of these conditions are true, the software automatically runs the update process.

When an update is available, you will see a dialog box notifying you that your copy of Agent Desktop will be updated. Click OK to proceed with the update.

A progress bar is displayed to show you the status of the download.

When the update is finished, you will see a final dialog box that tells you the update is complete, and which applications were updated. If you have other CAD applications (Cisco Supervisor Desktop and Cisco Desktop Administrator) on your PC, they will all have been updated.

**NOTE:** Because Agent Desktop is automatically installed when Supervisor Desktop is installed, only Supervisor Desktop will be listed as having been updated in the final dialog box. Agent Desktop will be listed only if Supervisor Desktop is not present on your PC.

When you click OK to close the dialog box, any CAD application that had been running on your desktop restarts automatically.

**NOTE:** To ensure that automated updates function correctly, Internet Explorer must be configured so that it checks for newer versions of stored pages. In Internet Explorer, choose Tools > Internet Options. In the Browsing history section on the General tab, click Settings. Select the option labeled Every time I visit the web page.

**NOTE:** If your system is configured with two Unified CCX servers, and one server is upgraded while your instance of CAD is connected to the older Unified CCX, and your system administrator performs a failover to switch all agents to the upgraded server, your instance of Agent Desktop will not automatically upgrade when you log into the new server. You must shut down Agent Desktop and start it again for the automatic upgrade to take place.

## Java Runtime Environment

Every time Agent Desktop is launched, it checks to see if the correct version of JRE is installed. If the correct version is not detected, you will be notified, and Agent Desktop will download and install the correct JRE.

## Logging In

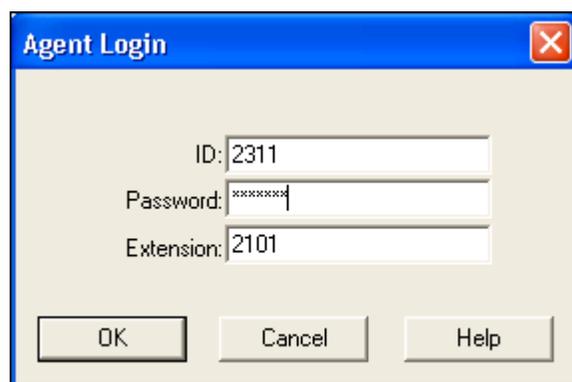
When you launch Agent Desktop, you are required to log in. If your configuration includes Cisco Unified Presence, you must also log into Unified Presence.

- If your Unified Presence and Agent Desktop logins are the same, when you log into Agent Desktop you are automatically logged into Unified Presence.
- If your Unified Presence and Agent Desktop logins are different, you will have to log into Agent Desktop and Unified Presence separately.

### To log into Agent Desktop:

1. Choose Start > Programs > Cisco > Desktop > Agent. The Agent Login dialog box appears (Figure 2).

Figure 2. Agent Login dialog box



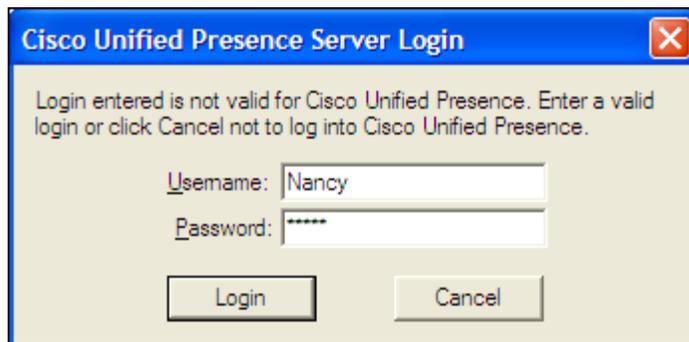
**NOTE:** You might receive a security warning that you are about to view pages over a secure connection. This can occur if you are using Windows XP and one of your configured integrated browser work sites is a secure site (https:// prefix). Select the “In the future, do not show this warning” check box and this message will not reoccur.

2. Enter your ID, password, and extension in the appropriate fields, then click OK or press Enter.

If you attempt to log in and the ID is already in use by another agent, you will be asked if you want to force the login. If you opt to do so, you will be logged in and the other agent using that ID will be logged out.

3. If your configuration includes Cisco Unified Presence and your Unified Presence login is different than your Agent Desktop login, the Cisco Unified Presence Server Login dialog box appears (Figure 3). Type your Unified Presence username and password and click Login.

**Figure 3.** Cisco Unified Presence Server Login dialog box



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

**NOTE:** Do not attempt to log into Cisco Unified Presence through both Agent Desktop and Cisco Unified Personal Communicator, even if you use different user IDs to do so. If you do so, the client applications can behave unpredictably.

**NOTE:** If Agent Desktop and Cisco Unified Presence are located on two different PCs, and you attempt to log into both concurrently using the same user ID, the logins will fail.

#### Login Notes

- CAD can control only those calls on the extension you enter in the Login dialog box, even if you are configured with multiple extensions.
- When you attempt to log in, you might see an error message, “A licensing error has occurred. Please see your administrator.” This generally appears when all CAD software licenses are in use. For this reason, it is important that you close CAD completely when you are done using it, rather than simply logging off. As long as CAD is running, one license is being used.

## Access Through a Virtual Private Network From Behind a NAT Firewall or Router

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

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

Using a VPN is recommended in order to provide a more secure connection.

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

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

If Agent Desktop can log into all services except the Chat service, it must be restarted after the Chat service comes back online.

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

## Logging Out

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You should log out before you exit Agent Desktop. If you exit Agent Desktop without logging out, you will remain logged into the ACD for another 20 minutes, or for as long as any call you are on lasts. Also, while Agent Desktop is running, it uses a software license, which might prevent another user from logging in.

If you do not log out before you exit Agent Desktop, after 20 minutes, or after the call ends, you will be automatically logged out.

### **To log out:**

1. Change to the Not Ready agent state.
2. Click Logout on the toolbar. If your system is configured to require reason codes, the reason code menu appears. Choose the appropriate reason code and then click OK. You are now logged out of the ACD.

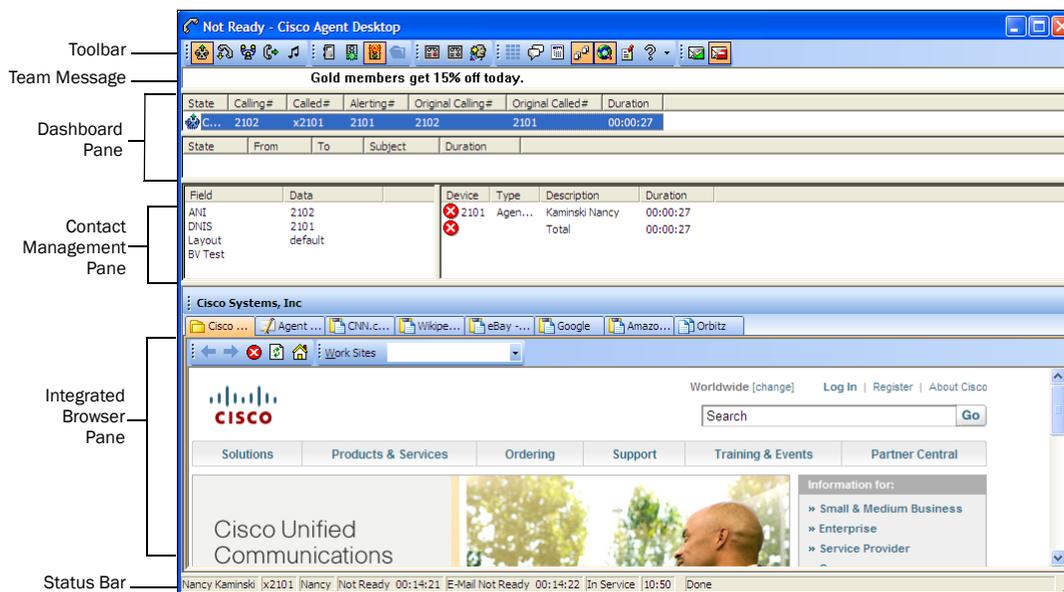
If you wish, you can keep Agent Desktop running and log back in later by clicking Login.

3. Click Close (the X in the upper right corner of the window) to exit Agent Desktop.

## The Agent Desktop Interface

The Agent Desktop interface (Figure 4) displays information about active calls and allows you to perform phone functions. It also allows you to view agent, call, and e-mail statistics real time displays (reports), and “chat” with other agents and supervisors using the Chat instant messaging feature.

Figure 4. Agent Desktop interface



## Accessibility

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

- Follows Windows settings for screen resolution and color/contrast settings
- Scrolling or non-scrolling team messages
- Screen reader-compatible tool tips for all controls
- Toolbar buttons available in small (16 × 16) and large (32 × 32) sizes
- Screen reader-compatible shortcut keys for navigating the application and toolbar
- Uses Windows settings for font sizes for all windows and popups
- Audible tones that sound when a nonagent-initiated dialog appears (for example, new chat windows and notices to the agent that a supervisor is barging in, intercepting, recording, and monitoring)

## Interface Shortcut Keys

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

**Table 2. Accessibility shortcut keys**

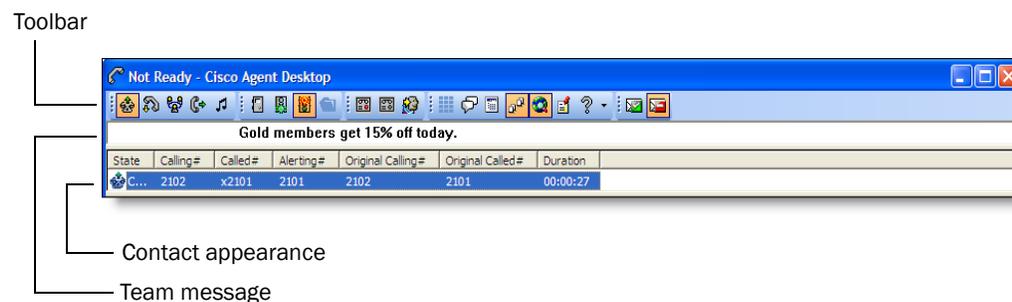
Shortcut Keys	Description
Ctrl+S	Selects the call appearance.
Ctrl+E	Selects the first entry in the Enterprise Data pane. Press Enter to open the Edit Enterprise Data dialog box for the selected entry.
Alt+P	In the Dial Pad window, selects the first entry in the Employee Phone Book.
Alt+E	In the Agent Real Time Displays window, selects the Real Time Displays drop-down list.
Alt+Y	In the Agent Real Time Displays window, with the Agent Call Log displayed, selects the Dates drop-down list.
Alt+S	In the Agent Real Time Displays window, selects the first cell in the grid control.
Ctrl+Shift+T	In the Integrated Browser, cycles through browser tabs.
Ctrl+Shift+B	Sets the focus to the current browser tab.
Ctrl+Alt+A	Opens the About window.

## Dashboard Pane

The dashboard pane ([Figure 5](#)) provides overall control for Agent Desktop. It consists of three parts:

- [Dashboard Pane \(page 18\)](#)
- [Team Message \(page 20\)](#)
- [Contact Appearance \(page 20\)](#)

**Figure 5. Dashboard pane**



### Dashboard Toolbar

The dashboard toolbar contains buttons for call control and for functions not related to a specific customer contact, such as logging in and out, changing your agent state, initiating a chat session, viewing real time displays, and configuring the appearance of the Agent Desktop interface.

Buttons on the toolbar are disabled if they control a function that is unavailable in your current situation. For example, if you have placed a call on hold, all other call control buttons are disabled. When you take the call off hold, the other call control buttons are active again.

**NOTE:** Your toolbar can be configured by your administrator and might use different buttons than those listed below.

You can control the size of the toolbar buttons. See ["Desktop Preferences" on page 25](#) for more information.

The toolbar buttons all have tooltips that describe the function associated with them. To view a button's tooltip, move your cursor over the button.

**Table 3. Dashboard toolbar buttons**

Button	Name	Shortcut	Description
	Answer/Drop	Ctrl+A	Answers or drops the selected call.

Table 3. Dashboard toolbar buttons – *Continued*

Button	Name	Shortcut	Description
	Hold/Unhold	Ctrl+H	Puts a selected call on hold or takes it off hold.
	Conference	Ctrl+F	Puts the selected call on hold and adds other parties into a conference call.
	Transfer	Ctrl+T	Puts a selected call on hold and transfers it to a third party.
	Touch Tones	Ctrl+D	Sends touch tones during an active call.
	Login	Ctrl+L	Logs you into the ACD (alternates with Logout).
	Logout	Ctrl+L	Logs you out of the ACD (alternates with Login).
	Ready	Ctrl+W	Changes your state to Ready, indicating that you are available to receive ACD calls.
	Not Ready	Ctrl+O	Changes your state to Not Ready, indicating that you are not available to receive ACD calls.
	Work	Ctrl+Y	Changes your state to Work, indicating that you are in wrap-up work after terminating a call and, when finished, will be available to receive routed calls.
	Task Buttons	Alt+[button number]	Task buttons (Enhanced and Premium versions only) are configured by your administrator to perform various functions, such as running a macro, launching an application, or sending a predefined chat message to your supervisor. There can be up to ten task buttons on the toolbar, and each button can be assigned more than one action. The buttons can be customized, so yours might be different.
	Make Call	Ctrl-M	Displays the dial pad so you can dial an outgoing call.

Table 3. Dashboard toolbar buttons – *Continued*

Button	Name	Shortcut	Description
	Chat	Ctrl+J	Initiates a chat session with another member of your team, your supervisor, a member of a conference call, or a Cisco Unified Presence user.
	Reports	Ctrl+Q	Displays the Agent Real Time Displays window, where you can view your own call logs and statistics.
	Show/Hide Contact Management	Ctrl+G	Shows or hides the contact management pane.
	Show/Hide Integrated Browser	Ctrl+B	Shows or hides the integrated browser pane.
	Preferences	Ctrl+P	Displays the Preferences dialog box, where you can set the Agent window behavior.
	Help/About	F1	Accesses the online help and the About window.

### Team Message

The team message (TM) is a message sent by a supervisor to the team for a selected length of time. A TM can be scrolling or non-scrolling, depending on how you set your desktop preferences. See "[Desktop Preferences](#)" on page 25 for more information.

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

### Contact Appearance

The contact appearance section displays data about the agent's current call and optional e-mail appearances. There can be more than one call/e-mail appearance in the contact appearance section. For example, you might have an e-mail saved as a draft, one call on hold, and one active call—all will be displayed.

The call contact appearance pane can display up to 7 fields. Two fields, State and Duration, will always be present; the other 5 fields are configurable by your administrator. The available fields are listed in [Table 4](#).

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

**Table 4. Call contact appearance fields**

Field	Description
State	The current state of the contact.
Calling#	The number of the phone that made the call.
Called#	The number of the phone that received the call.
Alerting#	The number of the ringing device.
Original Called#	The original number called.
Original Calling#	The initial originating number.
Duration	The length of the phone call.

Agent Desktop displays the same information about the call in the contact appearance pane as the IP phone displays on its screen. Enterprise Data might display different data because it tracks the entire life of the call.

The e-mail contact appearance pane can display up to 5 fields. The available fields are listed in [Table 5](#).

**Table 5. E-mail contact appearance fields**

Field	Description
State	The current state of the e-mail contact.
From	The name/address of the e-mail sender.
To	The name/address of the e-mail recipient.
Subject	The e-mail subject line.
Duration	The length of time the e-mail is in process.

## Contact Management Pane

The contact management pane contains enterprise data on the left and call activity information on the right (Figure 6).

**Figure 6. Contact Management pane**

Field	Data	Device	Type	Description	Duration
ANI	2091	2101	Agent	agent2101	00:02:21
DNIS	2101			Total	00:02:21
Layout	default				

Enterprise data

Call activity

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

### Enterprise Data

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

If you are set up by the administrator to be able to edit data fields, you can modify any of the data fields in the enterprise data window. The modified data will follow the call, for example, if you transfer it to another agent, that agent will see the modified data, not the original data.

#### To modify a data field:

1. Double-click the field you wish to modify. The Edit Enterprise Data window appears (Figure 7).

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

Field	Data
ANI	2091
DNIS	2101
Layout	default

OK Cancel

2. Modify the data.
3. Click OK.

### Call Activity

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

**Table 6. Call Activity fields**

Field	Description
Device	List of devices the call passed through.
Type	Type of device the call passed through.
Description	Description of the device the call passed through.
Total	Sum of all the durations listed.

**NOTE:** In some cases, a call can be on multiple devices simultaneously. For example, if a call is placed in multiple queues or is conferenced to multiple extensions, the call activity section displays the duration of the call on each individual device. No attempt is made to indicate overlapping times. In this case the total duration is the sum of the time spent on these overlapping devices, and is greater than the actual amount of time the call spends in the contact center.

**NOTE:** If a call is RNA (ring no answer) at one agent and then the call is rerouted to and answered by another agent, the total time shown in the second agent's Call Activity pane is incorrect. However, in any reports seen by the agent or supervisor, the total call time is correct.

### Thresholds

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

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



Caution



Warning

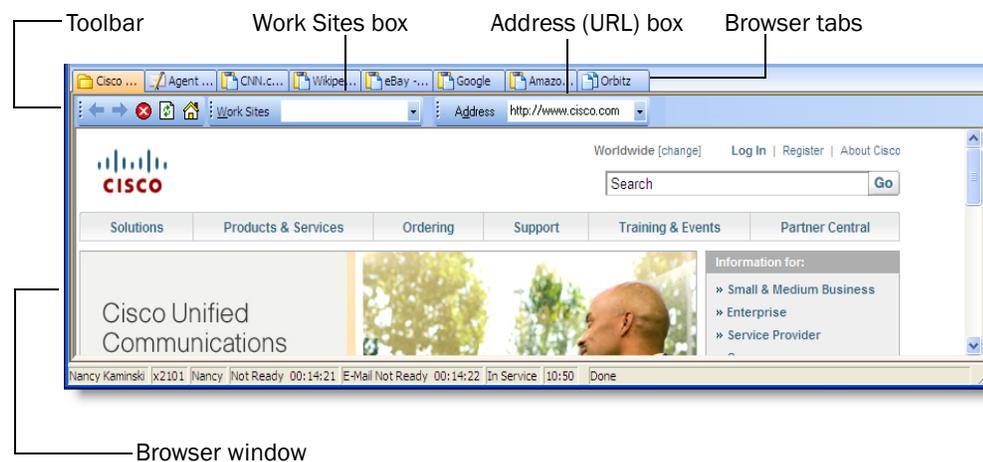
## Integrated Browser Pane

The integrated browser pane (Figure 8) displays internet or intranet web pages to help you assist customers. The administrator can configure a specific website to display as your home page, and add a list of work sites (similar to web browser “favorites”) that allow you to navigate to frequently-used websites quickly.

The integrated browser pane includes the:

- Integrated browser toolbar
- up to 10 browser tabs
- Work Sites box
- Address box (must be configured by the administrator to appear)
- Browser window

Figure 8. Integrated Browser pane



## Status Bar

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

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

For more information on the Current Status popup window and service autorecovery, see ["Wrap-up Data" on page 68](#).

**Figure 9. Status bar**

Nancy Kaminski	x2046	kaminsn	Not Ready	00:06:20	E-Mail Not Ready	Partial Service	09:41
Agent name	Agent extension	Agent ID	Current agent ACD state and the time spent in that state		Current e-mail state	Current status of Agent Desktop features	Current system time in 24-hour format

**NOTE:** E-mail state is shown only if the Agent E-Mail feature is enabled.

## Desktop Preferences

If your administrator configures your toolbar so that you have access to the Preferences button, you can change your Agent Desktop window behavior and accessibility options.

### *To set your desktop preferences:*

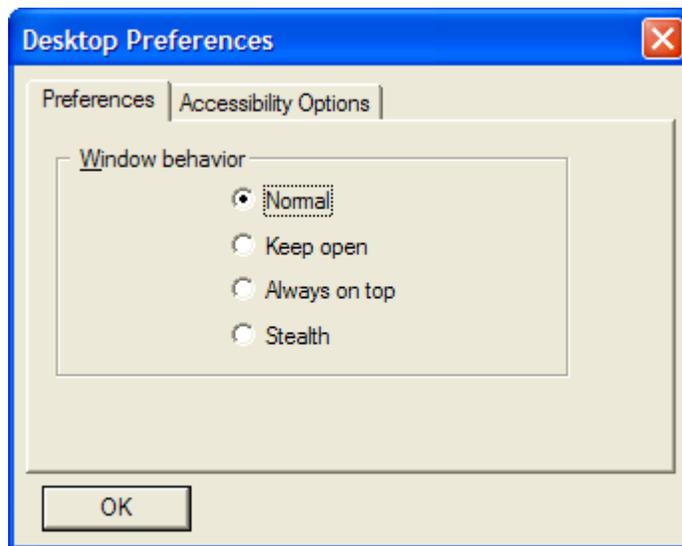
1. Click Preferences on the toolbar. The Desktop Preferences dialog box appears.
2. Select the preferences you desire on each tab, and then click OK.

### Setting the Window Behavior Mode

By default, Agent Desktop is minimized when it is idle and opens when calls are active (Normal mode). If your administrator has enabled you to choose your window behavior mode, you can change the behavior mode on the Preferences tab in the Desktop Preferences dialog box ([Figure 10](#)).

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

Figure 10. Preferences tab



The available modes are described in [Table 7](#).

Table 7. Window behavior modes

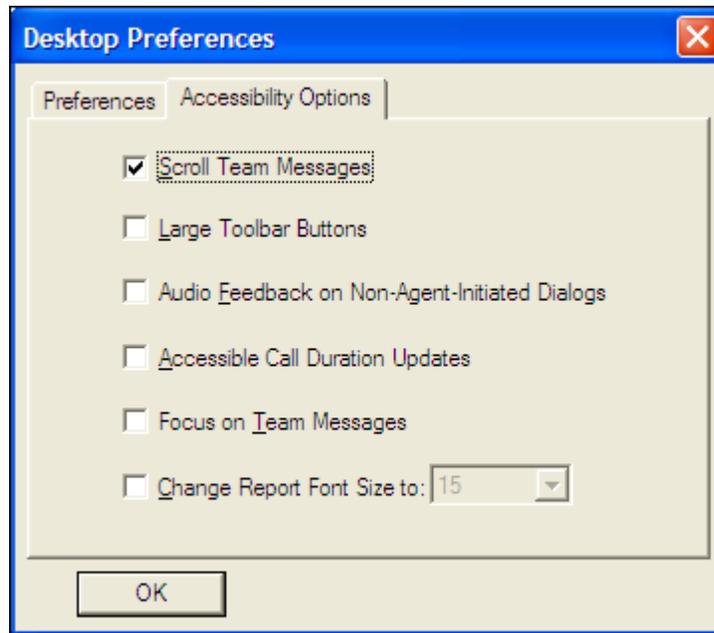
Mode	Description
Normal	Default. The window appears when calls are present and minimizes when idle.
Keep open	The window remains open when idle.
Always on top	The window remains open when idle and on top of all other open applications.
Stealth	The window appears as an icon in the system tray (lower right-hand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

## Setting the Accessibility Options

### Scroll Team Messages

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

Figure 11. Accessibility Options tab

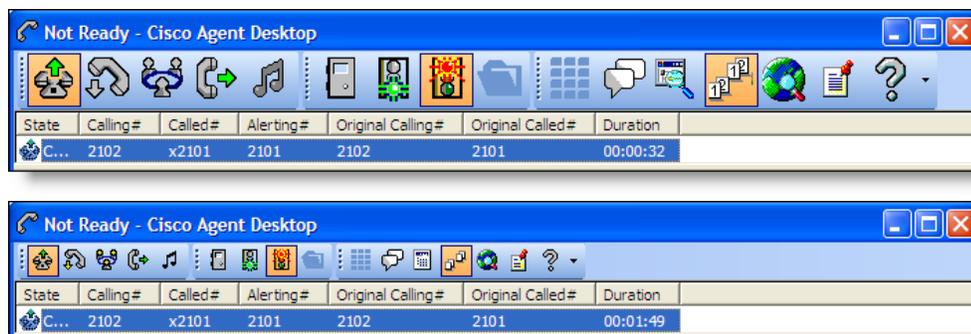


**NOTE:** Your selected team message behavior will persist from session to session, and does not need to be reset each time you start Agent Desktop.

### Icon Size

You can change the size of the buttons on the toolbar from the default 16 × 16 pixels to 32 × 32 pixels (Figure 12 for a comparison) by selecting the Large Toolbar Buttons check box. Note that if all of the buttons do not fit on one row, they automatically wrap to another row.

Figure 12. Comparison of large and small toolbar buttons



### Audio Feedback

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

### Call Duration

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

### Team Messages

Select the Focus on Team Messages check box to enable Agent Desktop to switch focus to the team message pane whenever a team message appears. This allows visually-impaired agents' screen readers to read the incoming team message.

### Report Font Size

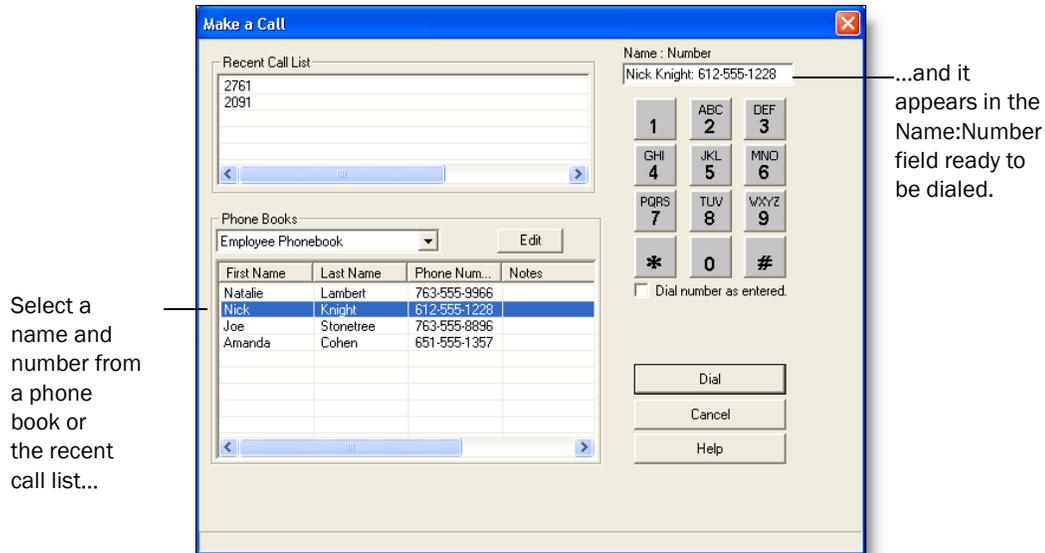
Select the Change Report Font Size To check box and enter a point size in the field to make the fonts bigger or smaller in the real time displays. You can choose a font size between 8 points and 72 points. The default point size is 15 points.

**NOTE:** If you change your font size using the display settings in Windows Control Panel, you must restart Agent Desktop for those changes to take effect.

## The Dial Pad Window

The dial pad window allows you to make calls either by entering a phone number or selecting an existing phone number from the recent call list or from a stored phone book (Figure 13).

Figure 13. Dial Pad window



**NOTE:** The dial pad window is the general name for this window. Depending on what you are doing, the window title can be Make a Call, Transferring Call, or Conferencing.

### Recent Call List

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

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

### Phone Books

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

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

### Employee Phone Book

Your employee phone book is the only one you can edit. All others are controlled by the system administrator.

#### To edit your employee phone book:

1. In the dial pad window, choose Employee Phonebook from the Phone Books drop-down list, and then click Edit. The Phone Book Editor dialog box appears (Figure 14).

Figure 14. Phone Book Editor dialog box

First Name	Last Name	Phone Num...	Notes
Natalie	Lambert	763-555-9966	
Nick	Knight	612-555-1228	
Joe	Stonetree	763-555-8896	
Amanda	Cohen	651-555-1357	

2. Make one of the following edits:

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

The Phone Number field allows only these characters:

0–9, aA–zZ, '()+;/:.=? and a space

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

- To edit an existing entry, select it to display it in the edit fields, click Edit, and then make your changes. If you wish to edit more than one entry, you can edit the first entry, and then double-click the next entry to save the changes you made to the first entry and move on to the next entry.
  - To delete an entry from the list, select it, and then click Delete.
3. When all your edits are completed, click OK.

### **Name: Number Field**

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

John Doe: 612-555-1212

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

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

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

### **Dial Number as Entered Check Box**

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

## Handling Phone Calls

---

You can use Agent Desktop or a hard IP phone to handle calls. Either way, calls appear in the dashboard pane.

The following sections assume you use Agent Desktop to handle calls.

### Entering Phone Numbers

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

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

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

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

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

### Answering a Call

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

If you receive a non-ACD call, you are automatically put in the Not Ready state, and then returned to your previous state after the call ends.

#### *To answer a call:*

- Click Answer.

#### *To terminate a call:*

- Click Drop.

## Making a Call

You can make a call from any agent state except Logoff, as long as you are not on a call.

Use the Make Call button to make a call.

### *To make a call:*

1. Click Make Call.  
The Make a Call dialog box appears.
2. Enter a number in the Name: Number field.
3. Click Dial.

## Entering Touch Tones During a Call

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

### *To enter touch tones:*

When prompted to enter numbers during a call, click Touch Tone. The number pad appears ([Figure 15](#)).

Figure 15. Touch tone number pad



- Enter the required numbers and/or symbols. When finished, click Done. The number pad closes and you are returned to the Agent Desktop interface.

## Entering Touch Tones During a Consultative Call

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

### *To enter touch tones during a consultative call:*

1. During a call, click Transfer or Conference. The Transferring Call or Conferencing dialog boxes appear.
2. Make the consultative call.  
The person you call must answer in order for the Touch Tones check box to become enabled.
3. Select the Touch Tones check box, and then enter the required number and/or symbols on the number pad.  
The number pad generates DTMF tones.
4. Clear the Touch Tones check box. The touch tones option is disabled.

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

## Transferring a Call

There are two types of transfer calls:

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

### *To transfer a call:*

1. With a call active, click Transfer. The Transferring Call window appears.
2. Enter the phone number to which you are transferring the call in the Name: Number field.
3. Click Dial. When the phone rings, the Dial button changes to the Transfer button.
4. Take one of the following actions:
  - For a blind transfer, click Transfer when the phone starts ringing.

- For a supervised transfer, wait for the phone to be answered, then announce the transfer. If you want to place the new call on hold and pick up the original call, click Alternate. Then click Transfer.

## Making a Conference Call

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

There are two types of conference calls:

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

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

**NOTE:** If you log out while on a conference call and then log in again, enterprise data field names will not be displayed in the Enterprise Data pane. The field names will be displayed for the next call you handle.

### ***To make a conference call:***

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

**NOTE:** The total number of conference call participants is configured in the Unified Communications Manager. Ask your supervisor for the total number configured for your contact center.

**NOTE:** There can be only three parties in a conference call. If you try to add a fourth party to the conference call, one of the other participants will be dropped. This is a limitation of Cisco Unified Communications Manager Express.

## Alternating Between Calls

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

### Alternating Before Transferring a Call

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

#### *To alternate between calls before transferring:*

1. While on a call, click Transfer. The Transferring Call window appears.
2. Enter the phone number to which you are transferring the call in the Name: Number field, and then click Dial. When the phone rings, the Dial button changes to the Transfer button. Wait for Party B to answer the phone.
3. Click Alternate to speak to Party A, and then click Alternate again to speak to Party B. You can continue clicking Alternate to switch between Party A and Party B. When you speak to one party, the other party is put on hold.
4. Click Transfer. Party A is transferred to Party B and you are disconnected from the call.

### Alternating Before Adding a Call to a Conference

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

#### *To alternate between a conference call and another party:*

1. While on a call, click Conference. The Conferencing window appears and the active call is put on hold.
2. Enter the phone number of the person you want to add to the conference call in the Name: Number field, and then click Dial. When the phone rings, the Dial button changes to the Add to Conf. button. Wait for Party B to answer the phone.

3. Click Alternate to speak to the conference, and then click Alternate again to speak to Party B. You can continue clicking Alternate to switch between the conference call and Party B. When you speak to one party, the other party is on hold.
4. Click Add ot Conf. Party B is added to the conference call.

## Cisco Unified Outbound Dialer

If configured by your system administrator, your copy of Agent Desktop may include the Cisco Unified Outbound Dialer toolbar.

Unified Outbound Dialer uses the Direct Preview Dialing Mode. In this mode, you are put into the Reserved state and then presented with a customer call along with customer information in the Enterprise Data window. Based on this information, you can decide to accept, skip, or reject the call. You can also categorize the phone call presented as Voice, Answering Machine, Invalid, Fax/Modem, Busy, or Do Not Call.

The personal callback feature enables you to reschedule a customer call at the customer's request for a more convenient time.

Callbacks can be configured so that, when the call is redialed, the call is directed to any agent (regular callback) or the call is directed to the agent who made the callback reservation (personal callback). The callback type is configured by the administrator at the campaign level and is not controlled by the agent.

### Outbound Dialer Toolbar

[Table 8](#) displays the Outbound Dialer toolbar buttons and describes their function.

**Table 8. Outbound Dialer actions and associated toolbar buttons**

Button	Action	Shortcut	Description
	Accept	Alt+Shift+A	The system dials the customer and connects the call to the agent.
	Reject	Alt+Shift+R	The system rejects the current call and releases the agent from the outbound calling reservation. At this point, the system can deliver to the agent another outbound call or a new inbound call.
	Reject Close	Alt+Shift+U	The system rejects the current call and closes the record so the customer will not be called again.
	Skip	Alt+Shift+S	The system skips the current call and presents the agent with another customer call.

Table 8. Outbound Dialer actions and associated toolbar buttons — *Continued*

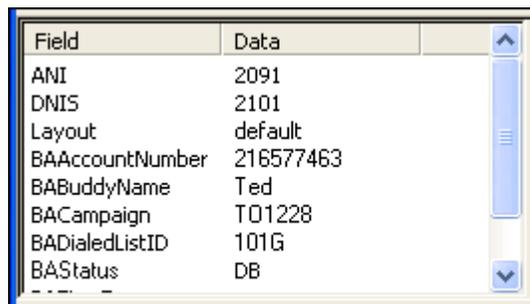
Button	Action	Shortcut	Description
	Skip Close	Alt+Shift+T	The system skips the current call and closes the record so the customer will not be called again.
	Skip-Next	Alt+Shift+K	The system skips the call and displays a menu of these options: <ul style="list-style-type: none"> <li>• Wrong Number (Alt+Shift+W). The agent is informed that the number called is a wrong number. After the call terminates, the system calls other customer phone numbers.</li> <li>• Not Home (Alt+Shift+N). The agent is informed that the customer is not home. After the call terminates, the system calls other customer phone numbers.</li> </ul>
	Callback	Alt+Shift+C	Displays the Callback Properties dialog box, which the agent uses to set a time and date to call back the customer. This action is enabled only if the agent is in the talking or wrap-up agent state. The agent also uses this dialog box to cancel a previously-scheduled callback of the current customer. This action works only if the agent is in a talking or wrap-up state during a Unified CCX-generated call.
	Reclassify	Alt+Shift+Q	Displays a menu that enables the agent to reclassify a customer phone number as follows: <ul style="list-style-type: none"> <li>• Voice (Alt-Shift-V)</li> <li>• Answering machine (Alt-Shift-M)</li> <li>• Fax/modem (Alt-Shift-F)</li> <li>• Invalid number (Alt-Shift-I)</li> <li>• Busy (Alt-Shift-B)</li> <li>• Do not call (Alt-Shift-X)</li> </ul>

Table 8. Outbound Dialer actions and associated toolbar buttons — *Continued*

Button	Action	Shortcut	Description
	Cancel Reservation	Alt+Shift+D	The system releases the agent from the calling campaign and places the agent in the Not Ready state. To resume participating in the calling campaign, the agent must change the agent state to Ready.

Information about Outbound Dialer calls is displayed in the Enterprise Data pane (Figure 16). Unified Outbound Dialer data field names are prefixed with “BA”, an abbreviation for “Blended Agent.”

Figure 16. Enterprise Data pane with Outbound Dialer data displayed



Field	Data
ANI	2091
DNIS	2101
Layout	default
BAAccountNumber	216577463
BABuddyName	Ted
BACampaign	T01228
BADialedListID	101G
BAStatus	DB

## Reclassifying a Contact

A contact can be classified as either Voice or one of the other options (Answering Machine, Fax/Modem, Invalid, Busy, Do Not Call).

The first time you click Reclassify, the Voice option on the drop-down menu is disabled, because the contact is classified as Voice by default. All other options are enabled.

The next time you Reclassify, the Voice option is now enabled, and all other options are disabled.

You can reclassify a contact as many times as needed. The reclassification options menu will alternate between showing the Voice option enabled and the other options disabled, and the voice option disabled and the other options enabled. If you need to reclassify a contact from one non-voice option to another non-voice option, you must first reclassify it as Voice in order to select the correct non-voice option.

For example, if you reclassify a Voice contact as Answering Machine, and then want to reclassify it again as Invalid, you must first reclassify it as Voice, and only then can you reclassify it as Invalid.

## Customer Callback

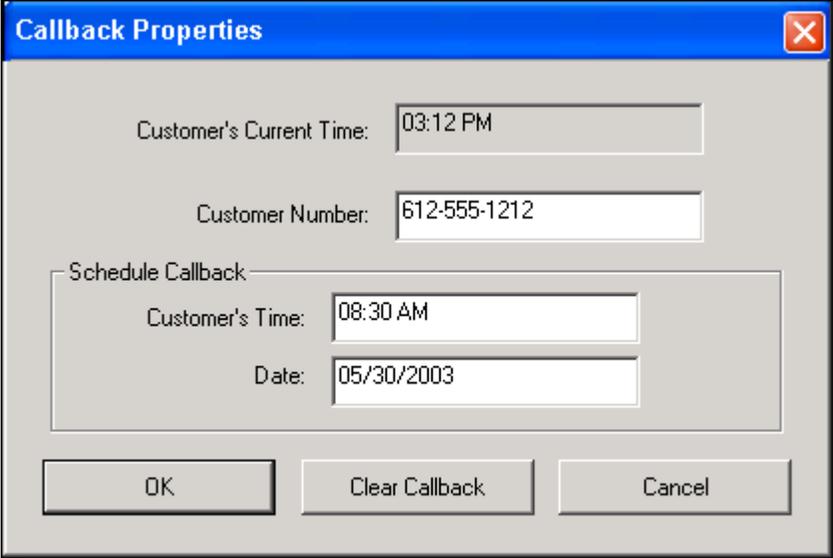
You can schedule a customer callback for a time more convenient to the customer.

### To schedule a customer callback:

1. While in Talking or Wrap-up state, click Callback.

The Callback Properties dialog box appears, displaying data about the current customer call (Figure 17).

Figure 17. Callback Properties dialog box



The screenshot shows a dialog box titled "Callback Properties". It has a blue header bar with a close button (X) on the right. The main area is light gray and contains the following fields and buttons:

- Customer's Current Time:** A text box containing "03:12 PM".
- Customer Number:** A text box containing "612-555-1212".
- Schedule Callback:** A section containing two text boxes:
  - Customer's Time:** A text box containing "08:30 AM".
  - Date:** A text box containing "05/30/2003".
- Buttons:** Three buttons at the bottom: "OK", "Clear Callback", and "Cancel".

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

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

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

**NOTE:** The number displayed in the Customer Number field is the dialer port, not the customer's phone number.

3. Click OK.

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

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

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

***To cancel a scheduled customer callback:***

1. While in Talking or Wrap-up state, click Callback.

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

2. Click Clear Callback.

The scheduled callback call is now cancelled.

## Supervisor Intervention

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Your supervisor is able to intervene in calls you receive. He or she can:

- “Barge In” on a call—join your call with a customer in a forced conference
- “Intercept” a call—transfer a customer call to him or herself in a forced transfer
- Monitor your calls
- Record your calls

You might or might not be notified when your supervisor monitors or records your calls, depending on how the system is configured.

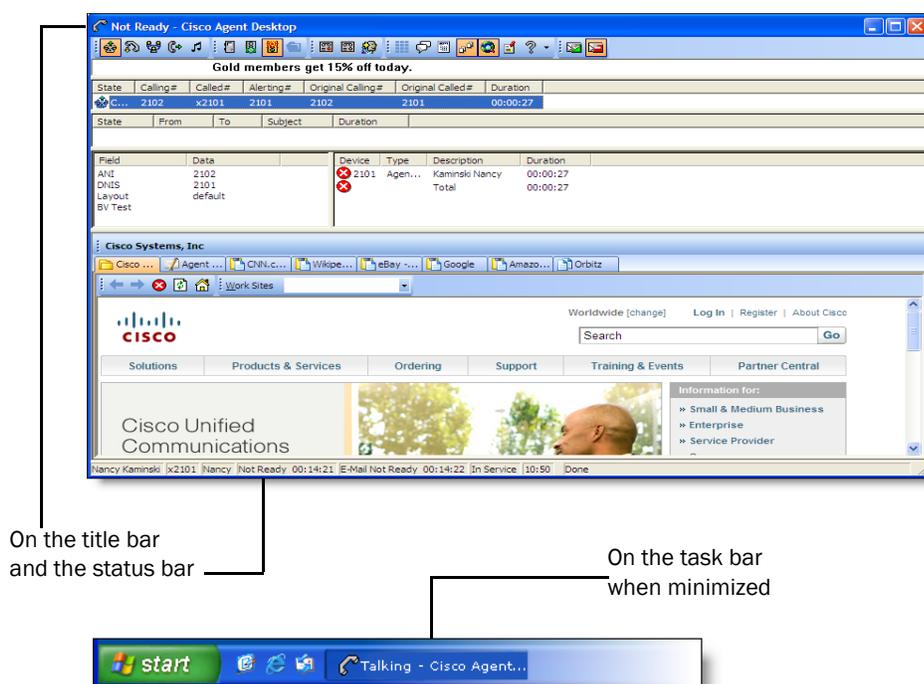
If notification is turned on, you will see a popup message telling you that your supervisor is intervening in one of the ways mentioned above. You will also be notified when the supervisor stops intervening in your call.

## Agent States

Agent Desktop allows you to change your agent state through the use of the agent state buttons on the toolbar. Only the agent states that are valid choices from your current agent state will be available at any given time.

Your current ACD agent state is displayed in the title bar (the top of the CAD window) and the status bar (the bottom of the CAD window). When CAD is minimized, your current agent state is readily visible on the button on the task bar.

**Figure 18.** Your current agent state is displayed in several places



On the title bar  
and the status bar

On the task bar  
when minimized

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

**NOTE:** Your agent state is changed to Not Ready automatically if you do not answer your phone. You will not receive any ACD calls until you set your state back to Ready.

The agent state buttons indicate the state you clicked, not your current state. For instance, if you click the Work state button while on a call, the Work button appears to be pressed. Your current state is displayed on the status bar.

Available agent states are listed in [Table 9](#).

**Table 9.** Agent states

State	Description
Logout	You are logged out of the ACD.
Not Ready	You are not available to receive routed calls.
Ready	You are available to receive routed calls.
Reserved	You are temporarily set aside to receive a specific call. Your state changes to the Talking state when you answer the call. If you fail to answer the call within a time limit specified by the system administrator, the ACD places you in a Not Ready state. The Reserved state is automatically set for you by the ACD and does not have a corresponding button. You can be in this state without the phone ringing (you are waiting for it to ring).
Talking	You are on the phone with a customer or another agent. This state is automatically set for you by the ACD and does not have a corresponding button.
Work	You are completing work from a previous call, and are unavailable to receive routed calls.

## Using Chat

Chat enables you to send instant messages to agents and supervisors on your teams. In addition, if your configuration includes Cisco Unified Presence, you can send instant messages to non-agents (called subject matter experts, or SMEs) who are using the Unified Presence Client.

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

Figure 19 displays the Contact Selection window.

Figure 19. Contact Selection window



This Contact Selection window displays four contact lists, or drawers: Agents, Supervisors, TAC, and Engineering. The Agents and Supervisor drawers are defaults and are always available. The TAC and Engineering drawers are examples of customizable drawers, which are available only when you are logged into Unified Presence. Note that the Engineering drawer is closed (the members are not visible).

Your contacts are organized in groupings called drawers. Some drawers, such as the Agents, Supervisors, and Conference drawers are default drawers. Any other drawers that appear are customized by your administrator and appear only if you are logged into Unified Presence.

- The Agents drawer lists all the agents on your team. The agents' agent state is indicated both by an icon to the left of the agent name and by text to the right of the agent name. The agent state is updated whenever an agent state changes. Agents do not have to be currently logged into Agent Desktop to be listed here, but they must have Agent Desktop open and they must have logged in at least once.

- The Supervisors drawer lists all supervisors on your team. Their status is always listed as Available. Supervisors must be logged in to be listed here.
- The Conference drawer appears when you are on a conference call with other agents. SMEs, if they are on the conference call, are not listed here.
- The Personal Contacts drawer appears if you have this drawer set up in Cisco Unified Personal Communicator. The contacts in this drawer are administered in Unified Personal Communicator.
- Other drawers list the SMEs associated with the work flow groups to which you belong. The SMEs' Unified Presence status is indicated both by an icon to the left of the SME name and by text to the right of the SME name. The Unified Presence status is updated whenever an SME status changes.

**NOTE:** When you log into Unified Presence, your status is shown as Available to SMEs unless the administrator has configured the system so that agents appear offline.

**NOTE:** You cannot chat with Cisco Agent Desktop—Browser Edition (CAD-BE) agents or IP Phone agents.

The Contact Selection window also provides menu access to the following call handling functions:

- Making a call
- Transferring a call
- Initiating a conference call

Some Chat features include:

- You can participate in multiple concurrent chat sessions.
- The title bar of the Chat window displays the name of the person with whom you are chatting.
- If you flag a chat message as high priority, the Chat window will pop on the other agent's or supervisor's screen so the message will be noticed immediately. This option does not apply to messages sent to SMEs.
- If the priority of a chat message is normal (the default), the Chat window will remain in its current state (open or minimized) and the corresponding icon will flash on your Windows task bar.
- A log of the chat messages sent between you and your chat partner is available as long as the Chat window is open. After you close the Chat window, the log is lost.
- The chat log is in chronological order, with the oldest message at the top of the chat window.

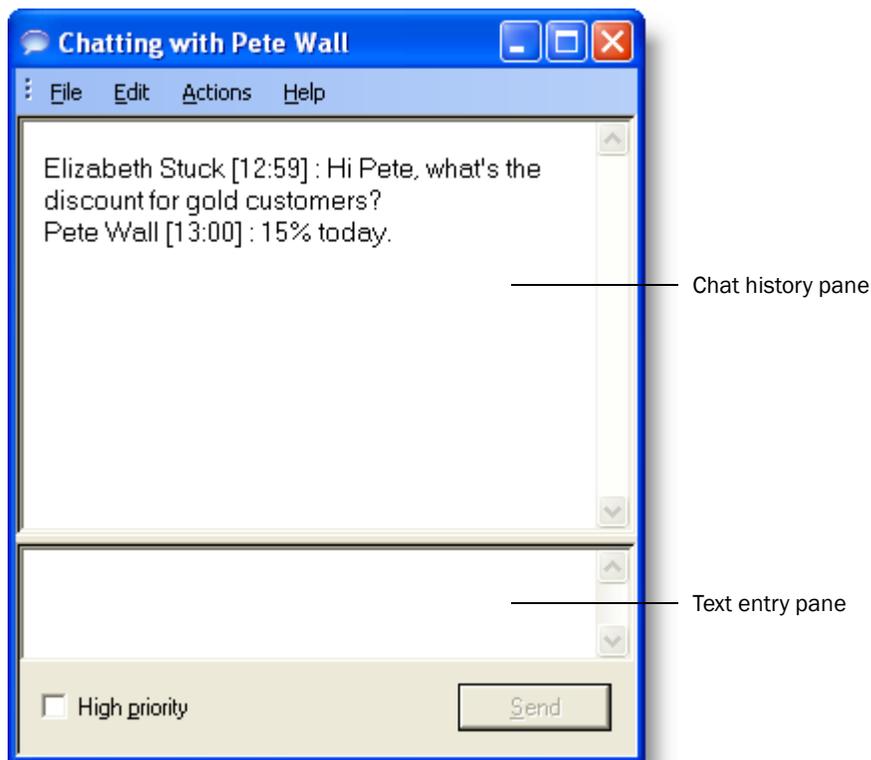
- You can chat with agents who are logged out of the ACD as long as they still have Agent Desktop open.

## Sending a Chat Message

### To initiate a chat session:

1. On the toolbar, click Chat. The Contact Selection window appears (see [Figure 19 on page 46](#)). This window lists the names and status of people with whom you can chat.
2. To chat with a person, double-click that person's name. A Chat window opens and a session begins with the person you selected ([Figure 20](#)).

Figure 20. Chat session window.



3. Type your message in the text entry field.
4. If you want your message to be noticed immediately by popping on the recipient's screen, select the High priority check box.
5. Click Send or press Enter. Your message is sent to your chat partner and logged in the chat log pane.

**To terminate a chat session:**

- Choose File > Close or click Close in the upper right-hand corner of the Chat window.

**Sending Enterprise Data**

You can use Chat to send the enterprise data associated with a call to someone.

**To send enterprise data:**

1. With a call active, open a chat session with the person to whom you want to send enterprise data.
2. From the Actions menu, choose Paste Enterprise Data. The enterprise data from the active call is pasted into the chat window.
3. Click Send.

**Predefined High-Priority Chat Messages**

You might have a task button configured to send a high priority chat message to your supervisor(s). This chat message is a predefined message set up by your administrator (for instance, "Please barge in to my call"). It appears in a Chat Session window that pops up on your supervisor's desktop. It behaves just like a chat message you send that is tagged as a high priority message.

**Calling Someone in Your Chat List**

You can make a call, transfer a call, or conference a call to anyone listed in your Contact Selection window using the call control actions.

**NOTE:** To call someone, you must be logged into Cisco Agent Desktop and be in an agent state that allows you to make a call.

You do not have to be chatting with an agent or SME in order to call them.

If an SME name does not have a phone number associated with it, the call control menu items are disabled.

**To call someone in your chat list:**

1. Do one of the following:
  - a. If you are not chatting with the person you want to call, right-click that person's name in the Contact Selection window and choose Call from the resulting popup menu, or select the person's name and then choose Call from the Actions menu.

- b. If you are chatting with the person you want to call, choose Call from the Actions menu.

The Make a Call dial pad appears with the person's phone number autofilled in the Name: Number field.

2. Click Dial.

***To transfer or conference a call to someone in your chat list:***

1. With a call active, do one of the following:
  - a. If you are not chatting with the person you want to call, right-click that person's name in the Contact Selection window and choose Transfer or Conference from the resulting popup menu, or select the person's name and then choose Transfer or Conference from the Actions menu.
  - b. If you are chatting with the person you want to call, choose Transfer or Conference from the Actions menu. The Transfer a Call or Conference a Call dial pad appears with the person's phone number autofilled in the Name: Number field.
2. Click Dial.

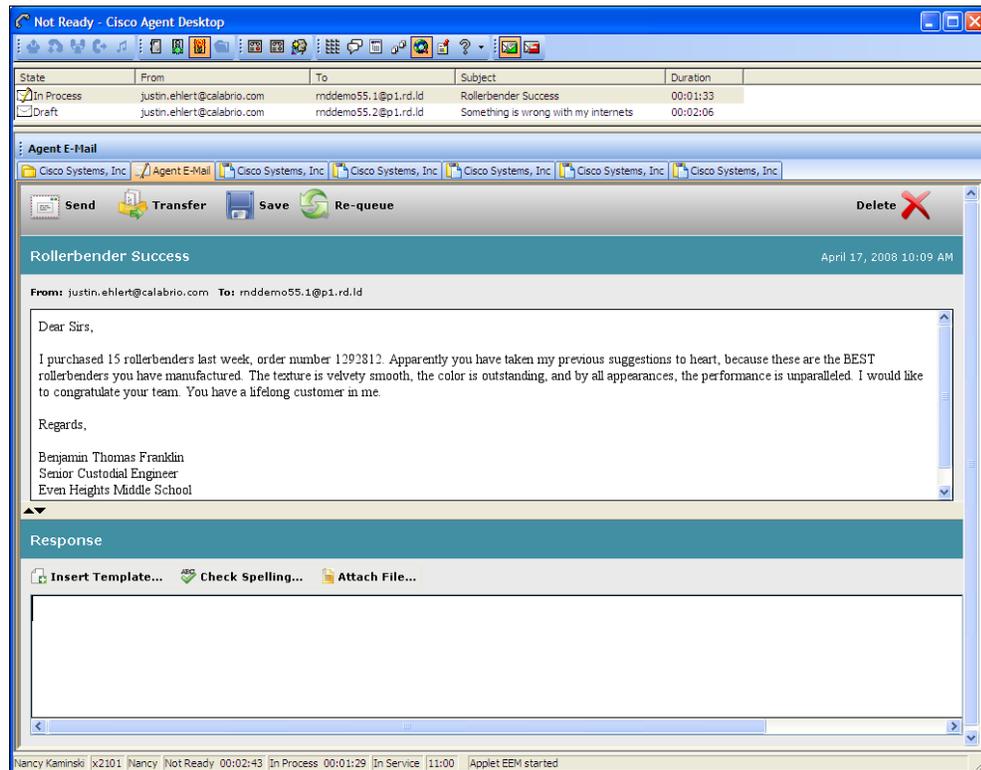
## Using Agent E-Mail

The Agent E-Mail feature is available only in the CAD Premium package.

**NOTE:** Agent E-Mail is not supported for the following languages: Chinese (Traditional and Simplified), Finnish, Japanese, Korean, Russian, and Swedish.

If you are assigned to one or more e-mail contact service queues in addition to voice contact service queues, and Agent E-Mail is enabled, Agent Desktop will display an Agent E-Mail tab in the integrated browser pane and several e-mail state buttons on the toolbar (Figure 21).

**Figure 21.** Agent Desktop with Agent E-Mail enabled



When you click the E-Mail Ready button, your agent state automatically changes to Not Ready, your e-mail state changes to E-Mail Ready, and the next available e-mail in your e-mail contact service queues appears in your Contact Appearance pane.

**NOTE:** The e-mail portion of the contact appearance pane is not visible until there are e-mails present.

You can work on 1 e-mail at a time. You can have up to 5 e-mails in your contact appearance pane (4 saved as drafts and 1 in process). The exact number allowed depends on how your administrator has configured Agent E-Mail. For example, if the maximum number of e-mails allowed in your contact appearance window is 3, you can have 2 e-mails saved as drafts and 1 e-mail in process.

When you select an e-mail to work on, the e-mail text is displayed in the upper portion of the Agent E-Mail tab, and a pane for your response is displayed in the lower portion of the tab.

**NOTE:** External links in a customer e-mail are not supported in the Agent E-Mail tab. If you click an external link in a customer e-mail, nothing happens.

**NOTE:** If the e-mail is over 1 MB in size, you will see an error message that the e-mail might not be able to be displayed in Agent Desktop. If you opt to not try to display the e-mail, or if you try to display it and it fails, the e-mail will still be listed in your contact appearance pane, and you will be able to requeue, send, save, or delete it.

You can attach files to your e-mail replies, or use templates your administrator has set up to insert boilerplate text to your e-mail.

## E-Mail States

The e-mail states are similar to agent states. Available e-mail states are listed in [Table 10](#).

Table 10. E-mail states

Button	State	Shortcut	Description
	E-Mail Ready	Ctrl+Shift+W	You are available to receive e-mails.
	E-Mail Not Ready	Ctrl+Shift+O	You are not available to receive e-mails.
—	E-Mail Processing	—	You have received an e-mail and are currently working with it. You can process e-mail while in either the E-Mail Ready or E-Mail Not Ready states.

## E-Mail Toolbar

The e-mail toolbar enables you to send, transfer, save, re-queue, and delete e-mail.

**Figure 22.** E-mail toolbar



The toolbar button functions are described in Table 11.

**Table 11.** E-mail toolbar button functions

Button	Description
Send	Sends your reply to the customer.
Transfer	Displays a drop-down list of available contact service queues (including the contact service queue the e-mail was originally delivered to) to which you can transfer the e-mail.
Save	Saves the e-mail you are working on as a draft. E-mail you save remains in your contact appearance pane until you send, re-queue, transfer, or delete it.
Re-queue	Returns the current e-mail to the contact service queue so it can be worked on by another agent.
Delete	Deletes the current e-mail. The e-mail is not actually deleted, it is forwarded to an e-mail address set up by the administrator so that a supervisor can decide if the e-mail should really be deleted or sent back into a contact service queue.

## E-Mail Format

The format of an e-mail reply is determined by the format of the incoming e-mail. If the customer e-mail is in text format, then the reply is in text format. If the customer e-mail is in HTML format, then the reply is in HTML format. You cannot choose the format for your reply.

**NOTE:** If you copy e-mail text and paste it into another application, such as Microsoft Word, all text formatting and line returns are lost.

The customer's original e-mail is quoted at the bottom of your reply. You cannot edit the customer's e-mail in your reply.

## Answering an E-Mail

To answer an e-mail, follow these steps.

### To answer an e-mail:

1. When not on a call, click E-Mail Ready. Your agent state changes to Not Ready, your e-mail state changes to E-Mail Ready, and the next available e-mail is sent to your contact appearance pane.
2. Click the e-mail. The text of the e-mail is displayed in the upper portion of the Agent E-Mail tab in the browser pane.

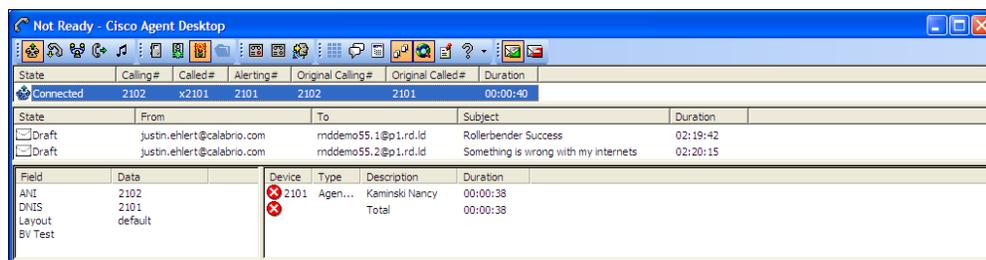
**NOTE:** If the e-mail has a long subject line and appears truncated, you can view the entire subject line by hovering your mouse over the Subject Line field.

3. In the Response section of the Agent E-Mail tab, type your response to the e-mail.
  - Click Attach File to navigate to a file location and select a file to attach to your reply. The file attachment can be of any format. By default, the maximum attachment file size is 10 MB. This limit can be configured by your administrator, so the limit in your contact center might be different.
  - Click Insert Template to display a drop-down list of available templates set up by your administrator that you can insert in your reply. The template is inserted where your cursor is positioned.
  - Click Check Spelling to run a spell check on your reply.
4. When your reply is complete, click Send. Your reply is sent to the customer.

## Managing E-Mails and Calls

An incoming call will always take precedence over an e-mail you are working on. When you receive a call, the e-mail in process is automatically saved as a draft and your e-mail state is changed to E-Mail Not Ready.

**Figure 23.** Agent Desktop showing an active call and 2 draft e-mails



When the call is finished, you can select the e-mail you were working on previously and continue writing your response.

**NOTE:** You can work on e-mail in either the E-Mail Ready or E-Mail Not Ready states. To continue to receive e-mails for processing, you must change to the E-Mail Ready state.

The status of each e-mail in the contact appearance pane is shown both by text and by icon. The status icons are listed in Table 12.

**Table 12.** E-mail status as shown in the contact appearance pane

Icon	Description
	In Process. The e-mail is currently being worked on.
	Draft. Work on the e-mail has started but was interrupted for some reason, and so was saved as a draft.

### E-Mail Re-queue on Logout

Your administrator has the option of configuring Agent E-Mail so that, when you log out, any e-mail that is assigned to you is re-queued to be handled by another agent. In this case, any drafts you have in process when you log out will be lost.

If the re-queue on logout option is not enabled, e-mail you save as a draft remains assigned to you when you log out. It will appear in the contact appearance pane when you log back in. If an e-mail is urgent and requires immediate handling, but you must log out, it is recommended that you re-queue the e-mail so that it can be worked on by another agent.

## Using Recording

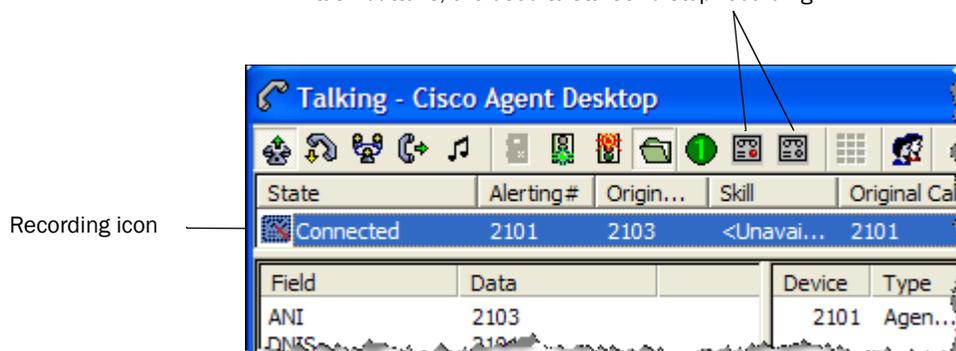
You can record calls if you are set up to do so by your administrator. The administrator customizes your toolbar with two task buttons: one button starts recording and the other button stops recording (Figure 24).

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

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

**Figure 24.** Recording a call

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



When recording a call, keep in mind the following:

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

## Agent Real Time Displays

---

There are several real time displays (reports) you can view in the Agent Report window. These displays are:

- [Agent ACD State Log Display \(page 58\)](#)
- [Agent Call Log Display \(page 59\)](#)
- [Agent Statistics Display \(page 60\)](#)
- [Contact Service Queue Statistics Display \(page 61\)](#)
- [Agent E-Mail Log Display \(page 62\)](#)
- [Agent E-Mail Detail Display \(page 63\)](#)

If a display you select to view is unavailable because of a service failure, the display will be blank, and “Real Time Display: Inactive” is shown in the display window status bar. You can check which real time displays are unavailable by viewing the Service Status window (see ["Service Status" on page 69](#) for more information).

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

**NOTE:** The Agent Real Time Displays window is designed to always be on top of other open windows. However, if the “Always on Top” window behavior mode is selected for the main Agent Desktop window, it will override the Agent Real Time Displays behavior and appear on top of it.

***To view agent real time displays:***

1. On the dashboard toolbar, click Reports. The Agent Real Time Displays window appears.
2. From the Real Time Displays drop-down list, select the display you want to view. The display appears in the window.
3. Click Refresh (if enabled) to update the information, if necessary.

## Agent ACD State Log Display

The Agent ACD State Log Display shows a record of all ACD server state transitions for the current day, starting at midnight. The report is in chronological order.

The display data is listed in [Table 13](#).

**Table 13. Agent ACD State Log Display fields**

Field	Description
Start Time	The time the ACD agent state was initiated. Start time is based on the time the Recording & Statistics service received the ACD agent state data from CAD, so that the start time reflects the Recording & Statistics server time, not the time shown on your PC. Note that if the Recording & Statistics server and the agent PC are in different time zones, this is taken into account so that start times display the correct time zone.
Agent State	ACD agent state. The last ACD state written to the log is actually the previous ACD state that you were in. In order to calculate State Duration, the current state cannot be written to the log until you transition to the next ACD agent state.
Wrap-up Data	Any wrap-up data you entered when transitioning to the Work state after a call or after sending an e-mail.
Reason Code	A number followed by a string description in parentheses identifying why the agent is in the current state. Blank if there is no reason code. This field applies only to the Not Ready and Logout states.
State Duration	Length of time you were in the ACD agent state.

## Agent Call Log Display

The Agent Call Log Display shows a record of calls made and received over the last 7 days by day, starting at midnight each day.

The display data is listed in [Table 14](#).

**Table 14. Agent Call Log Display fields**

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

## Agent Statistics Display

The Agent Statistics Display shows your performance statistics for the current day, starting at midnight. This display is automatically updated every 30 seconds. You cannot refresh the data manually.

The display data is listed in [Table 15](#).

**Table 15. Agent Statistics Display fields**

Field	Description
Calls Presented	Number of inbound calls (ACD or non-ACD) that are delivered to your extension (causes your phone to ring). This can be verified by counting the number of entries whose call direction displays “Inbound” in the Agent Call Log for the current day.
Calls Handled	Number of inbound or outbound calls (ACD or non-ACD) that are answered at your extension. This can be verified by counting the number of entries whose Call Answered column displays “Yes” in the Agent Call Log for the current day.  <b>NOTE:</b> To include outbound calls in the Calls Handled field, the configuration file for the Recording & Statistics service must be modified. See “Configuring the Recording & Statistics Service” in the <i>Cisco CAD Troubleshooting Guide</i> for information on performing this modification.
Avg Talking	The total time spent in the Talking state (all talk time + all hold time) divided by the number of times you are in the Talking state since midnight. If you are currently in the Talking state, that time is not used in the calculation of the average.
Max Talking	The length of the longest call (talk time + hold time).
Total Talking	The total time on calls (all talk time + all hold time + all reserved time).
Avg Ready	The total time spent in the Ready state divided by the number of times you are in the Ready state since midnight. If you are currently in the Ready state, that time is not used in the calculation of the average.
Max Ready	The longest time spent in the Ready state.
Total Ready	The total time spent in the Ready state.

Table 15. Agent Statistics Display fields – *Continued*

Field	Description
Avg Not Ready	The total time spent in the Not Ready state divided by the number of times you are in the Not Ready state since midnight. If you are currently in the Not Ready state, that time is not used in the calculation of the average.
Max Not Ready	Longest time spent in the Not Ready state.
Total Not Ready	The total time spent in the Not Ready state.
Avg After Call Work	The total time spent in the Work state divided by the number of times you are in the Work state since midnight. If you are currently in the Work state, that time is not used in the calculation of the average.
Max After Call Work	The longest time spent in the Work state.
Total After Call Work	The total time spent in the Work state.

### Contact Service Queue Statistics Display

The Contact Service Queue Statistics Display shows information about contact service queues and the calls routed to them for the current day, starting at midnight. This display is automatically updated every 10 seconds. You cannot refresh the data manually.

The display data is listed in [Table 16](#).

Table 16. Contact Service Queue Statistics Display fields

Field	Description
Calls Waiting	The total number of calls waiting in the contact service queues from which the agent receives calls.
Current Oldest	The elapsed wait time of the oldest call in the contact service queue.
E-Mails in Queue	The total number of e-mails waiting in the contact service queues from which the agent receives e-mail.
Oldest E-Mail in Queue	The elapsed wait time of the oldest e-mail in the contact service queue.

## Agent E-Mail Log Display

The Agent E-Mail Log Display shows a record of the e-mails that the agent retrieved or for which the agent in one way or another completed activity over the last 7 days, by day, starting at midnight each day. The Agent E-Mail Log Display appears only if the agent supports at least one e-mail contact service queue.

The display data is listed in [Table 17](#).

**Table 17. Agent E-Mail Log Display fields**

Field	Description
E-Mail Retrieve Time	The time the agent retrieved the e-mail.
Status	If the e-mail is still at the agent desktop, either In Process or Draft, as per the current status. If the agent has completed activity on the e-mail, the means by which the agent completed that activity: Delete, Transfer, Re-queue, or Sent.
Close Time	The date and time that the agent transferred, re-queued, or sent the e-mail. This field is blank if the e-mail status is In Process or Draft.
Processing Duration	The length of time that the agent spent processing the e-mail. This field is blank if the e-mail status is In Process or Draft.
On Deck Duration	The length of time from when the agent retrieved the e-mail to when the agent sent, transferred, or re-queued the e-mail. This field is blank if the e-mail status is In Process or Draft.
To	Address to which the e-mail was sent.
From	Address from which the e-mail was sent.
Subject	The e-mail subject line.
CSQ	The contact service queue through which the e-mail was routed to the agent.

## Agent E-Mail Detail Display

The Agent E-Mail Detail Display shows statistics accumulated over the current day, starting at midnight. The Agent E-Mail Detail Display appears only if the agent supports at least one e-mail contact service queue.

The display data is listed in [Table 18](#).

**Table 18.** Agent E-Mail Detail Display fields

Field	Description
E-Mails Retrieved	The number of e-mails the agent has retrieved since midnight. The retrieval might be the result of agent action or the outcome of a work flow.
E-Mails Transferred	The number of e-mails the agent has transferred since midnight.
E-Mails Requeued	The number of e-mails the agent has re-queued since midnight.
E-Mails Sent	The number of e-mails the agent has sent since midnight.
E-Mails Deleted	The number of e-mails the agent has deleted since midnight.
Total In-Process Time Sent E-Mails	The total time in process for e-mails that the agent has sent. All in-process time is included for the e-mails, regardless of whether the in-process time occurred during the current day or not.
Maximum In-Process Time Sent E-Mails	The longest in-process time across all e-mails that the agent has sent. In determining the longest, all in-process time is included for each e-mail, regardless of whether the in-process time occurred during the current day or not.

## Using the Integrated Browser

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The integrated browser allows you to view intranet and internet web pages from within Agent Desktop. The integrated browser can have up to 10 tabs. The first tab is reserved for web pages that your supervisor can push to you in order to assist you in helping customers.

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

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

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

### Integrated Browser Notes

- You must have Internet Explorer 6 or 7 on your PC for the integrated browser to function.
- Internet Explorer 7's tabbed browsing feature does not function in the CAD integrated browser.
- The integrated browser does not support popup windows from a secure website.
- Reordering integrated browser tabs by dragging is not supported.
- The integrated browser supports only one web session at a time for web applications that use cookies for session management. For example, you cannot log into a web application that uses cookies in one tab as User A and then log into the same web application in another tab as User B. However, multiple web sessions are supported for web applications that use URL-based session management.

## Browser Toolbar

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

Table 19. Browser toolbar buttons

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

## Accessing Work Sites

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

## Accessing Other Websites

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

**NOTE:** Because the first tab is reserved for supervisor-pushed web pages, it does not contain an address field, unless it is the only tab enabled in your browser.

*To access a website using the Address field:*

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

## Dialing Hyperlinked Phone Numbers

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

- The phone number must be 10 digits long and use the North American dial string format:  
`<area code> <exchange> <subscriber number>`
- The phone number can have parentheses around the area code, and use any combination of space, hyphen, and period in the phone number.
- Numbers shorter than 10 digits, such as local numbers without area codes or phone extensions, cannot be dialed.
- Phone numbers that are actually image files or are populated from databases cannot be dialed.
- Some web sites hide hyperlinks; the phone number might not look like it is hyperlinked, but it actually is and can be dialed.
- The phone number cannot contain alpha characters. For instance, the phone number 800-GET-PZZA cannot be dialed.
- You can dial a hyperlinked phone number only if you are in the Not Ready agent state.
- A dialed hyperlinked phone number will not appear in the Recent Call List in the Dial Pad window.
- The phone number hyperlinks disappear if you refresh the site by right-clicking and choosing the Refresh menu option. To refresh the page without losing the hyperlinks, press F5 or click Refresh on the integrated browser toolbar.

## Reason Codes

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

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

Whenever you initiate a transition to the Not Ready or Logout state, or such a transition is included in a work flow, a popup dialog box appears (Figure 25). You must select the appropriate code from that dialog box and click OK in order to make the transition.

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

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

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

Figure 25. Reason Code dialog box



## Wrap-up Data

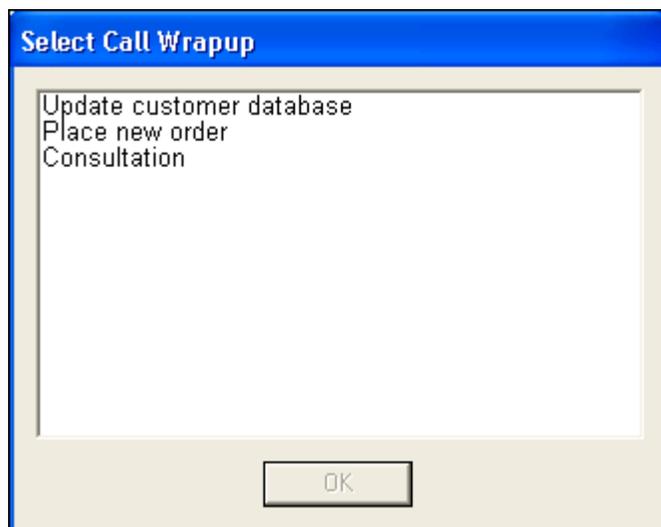
---

Agent Desktop can be configured by the administrator so that you are required to enter wrap-up data.

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

If you transition to the Work state immediately after ending a call or sending an e-mail, the Select Call Wrap-up dialog box appears (Figure 26). (This happens when you click Work during the call, or when the CSQ through which you received the call has been configured with the Automatic Work option.) Select the appropriate description that sums up the call outcome and click OK to continue.

Figure 26. Select Call Wrap-up dialog box



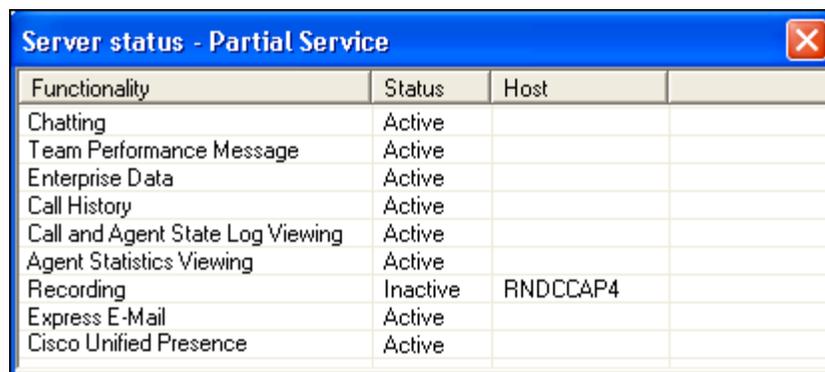
## Service Status

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

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

To learn more about what is affected by the service failure, double-click the status message on the status bar. CAD displays a popup box that lists CAD features and indicates if that feature is available or not due to the service outage (Figure 27). The server that hosts the failed service is listed in the Host column. This field can display either the host’s IP address, host name, or both.

Figure 27. Server Status popup dialog box



Functionality	Status	Host
Chatting	Active	
Team Performance Message	Active	
Enterprise Data	Active	
Call History	Active	
Call and Agent State Log Viewing	Active	
Agent Statistics Viewing	Active	
Recording	Inactive	RNDCCAP4
Express E-Mail	Active	
Cisco Unified Presence	Active	

### Phone Network Failure

In the event that your phone loses its connection to the network, you are automatically moved to the Not Ready agent state, and you will see a popup window displaying a message that the phone is out of service.

Until you complete your current call, the phone cannot reconnect to the network and CAD will not be able to show the call’s actual length because it shows as “terminated” in the system.

When the phone comes back into service, the popup window displays a message that the phone is in service. You can then change your agent state back to Ready and resume taking calls.



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