



Cisco Agent Desktop User Guide

Cisco Unified Contact Center Enterprise and Hosted Release 8.0

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Cisco Agent Desktop User Guide

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Cisco Agent Desktop User Guide

Introduction

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

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. Agent Desktop requires minimum screen real estate and enables agents to customize its functionality to meet their individual needs.

Intended Audience

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

What's New In This Release

Cisco Agent Desktop 8.0 includes these new features:

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

Agent Desktop Feature Levels

There are three feature levels of Agent Desktop: Standard, Enhanced, and Premium.

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

Table 1. Agent Desktop features

Feature	Standard	Enhanced	Premium
Agent-initiated call recording		•	•
Agent-initiated chat	•	•	•
Cisco IP Communicator support	•	•	•
Cisco Unified Mobile Agent support	•	•	•
Cisco Unified Outbound Dialer		•	•
Cisco Unified Presence Server integration	•	•	•
Enterprise data thresholds		•	•
Event-triggered workflows		•	•
HTTP Post/Get action			•
Integrated browser with multiple tabs			•
IPC actions			•
Reason codes	•	•	•
Task buttons		•	•
Timer action		•	•
Wrap-up data	•	•	•
CTI OS Record action		•	•

Configuring Cisco IP Communicator

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

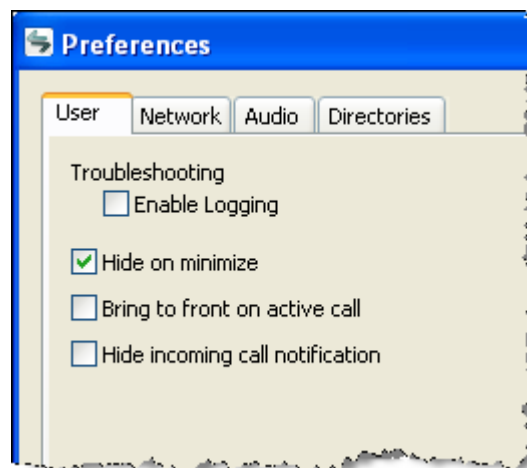
You must start IP Communicator manually (it does not start automatically when you start Agent Desktop). To conserve system resources, keep IP Communicator minimized as much as possible and use the Agent Desktop interface for call control.

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

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

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

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



Automated Updates

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

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 the update process runs, a dialog box appears, stating that your copy of Agent Desktop will be updated. Click OK and then follow the instructions in the series of dialog boxes that follows. After the update finishes, a final dialog box appears, stating that your update is complete. Click OK, restart Agent Desktop, and log in as you usually do.

NOTE: To ensure that automated updates function correctly, you must configure Internet Explorer so that it checks for newer versions of stored pages. To configure this setting, launch Internet Explorer and 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.

Logging in Using Agent Desktop

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

- [Logging in as a Local Agent \(page 10\)](#)
- [Logging in as a Mobile Agent \(page 12\)](#)

Multi-line Phones

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

Only two calls per line are supported.

Logging in as a Local Agent

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

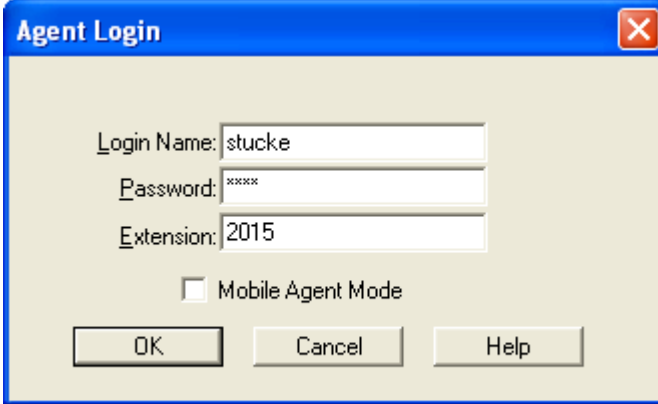
To log in as a local agent:

1. Choose Start > Programs > Cisco > Desktop > Agent. The Agent Login window appears.

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

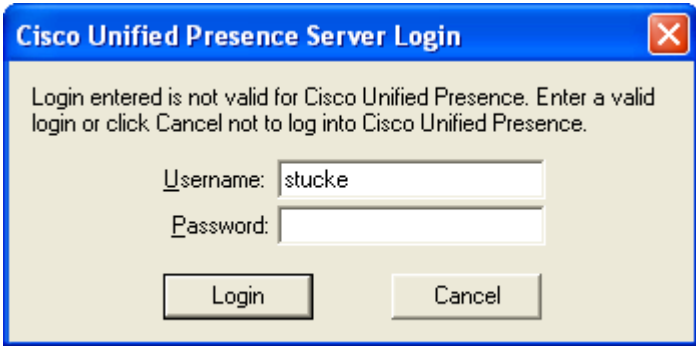
(Figure 2).

Figure 2. Agent Login window

The image shows a Windows-style dialog box titled "Agent Login". It has a blue title bar with a red close button in the top right corner. The main area is light beige. It contains three text input fields: "Login Name:" with the text "stucke", "Password:" with masked characters "xxxx", and "Extension:" with the text "2015". Below these fields is a checkbox labeled "Mobile Agent Mode" which is currently unchecked. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

2. Type your login name/ID, password, and extension in the appropriate fields, then click OK.
 - If your configuration includes Cisco Unified Presence Server, and your Unified Presence Server login is different from your Agent Desktop login, the Cisco Unified Presence Server Login window appears (Figure 3). Type your Unified Presence username and password and click Login.

Figure 3. Cisco Unified Presence Server Login window

The image shows a Windows-style dialog box titled "Cisco Unified Presence Server Login". It has a blue title bar with a red close button in the top right corner. The main area is light beige. At the top, there is a message: "Login entered is not valid for Cisco Unified Presence. Enter a valid login or click Cancel not to log into Cisco Unified Presence." Below this message are two text input fields: "Username:" with the text "stucke" and "Password:" which is empty. At the bottom of the dialog are two buttons: "Login" and "Cancel".

- If your configuration does not include Cisco Unified Presence Server, or your Unified Presence Server login is the same as your Agent Desktop login, Agent Desktop starts and is automatically minimized.

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, the client applications can behave unpredictably.

NOTE: The first time you log in using Agent Desktop, the Login Name/ID, Password, and Extension fields are empty. The next time you log in, the Login Name/ID and Extension fields are automatically filled with the information you entered previously. If you share a computer with another agent, verify that the Login ID/Name and Extension fields have your information and not the other agent's information.

- If you enter a login name/ID that is already in use by another agent, a dialog box appears, asking if you want to log out the ID. If you choose yes, CAD will log out the agent using that ID and will log you in. This is known as a “forced login.”
- If you enter an extension that is already in use by another agent, an error message appears, stating that the extension is already in use. You must enter a different extension to log in.
- If the login method (Login Name or Login ID) is changed while you are logging in, an error message appears, stating that the login method has changed. You must restart Agent Desktop to log in.

Logging in as a Mobile Agent

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

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

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

NOTE: You *must* use Agent Desktop for all call control operations as described below. If you use your phone for call control, you might lose the customer's call. Also, use Agent Desktop to monitor call activities, such as conference status. This information is not displayed

accurately (or not at all in some cases) on your phone. Consult your Cisco Unified Mobile Agent documentation for more information.

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

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

To log into Agent Desktop as a mobile agent:

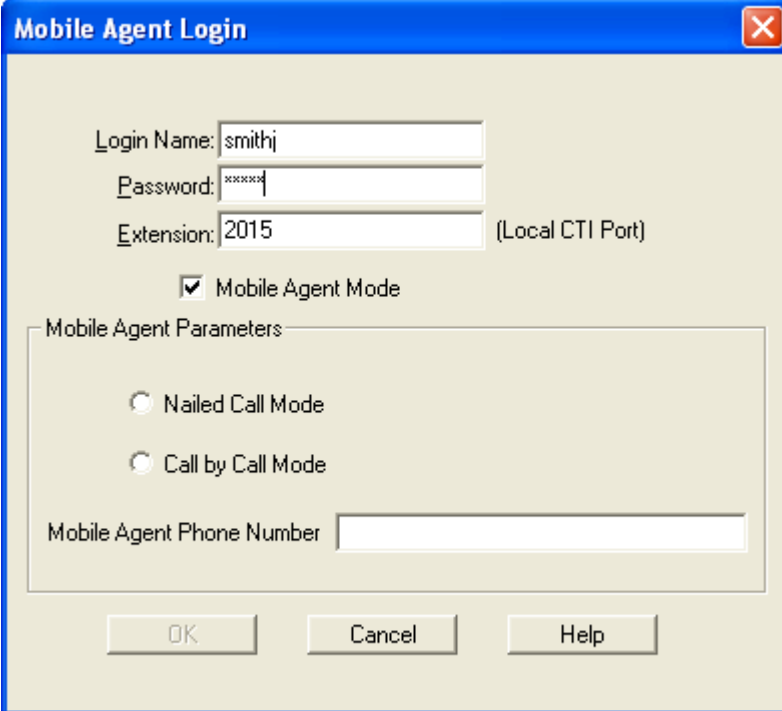
NOTE: If you are not configured as a mobile agent, or if you choose a call mode you are not set up to use, your mobile agent login will fail. If this occurs, contact your administrator.

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

1. Choose Start > Programs > Cisco > Desktop > Agent. The Agent Login window appears ([Figure 2 on page 11](#)).
2. Type your login name/ID, password, and extension in the appropriate fields.

3. Select the Mobile Agent Mode check box. The Mobile Agent Login window appears (Figure 4).

Figure 4. Mobile Agent Login window



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

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

5. Click OK or press Enter to log in. Agent Desktop starts and is automatically minimized.

Login Notes

- The Login Name field has a maximum of 32 characters. The Login ID, Extension, and Password fields have a maximum of 12 characters.
- When you log in, you might see the error message, “A licensing error has occurred. Please see your administrator.” This generally appears when all Agent Desktop software licenses are in use. For this reason, it is important

that you close Agent Desktop completely when you are done using it, rather than simply logging off. As long as Agent Desktop is running, one license is being used.

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

Access Through a VPN From Behind a NAT Firewall or Router

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

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

NOTE: Using a VPN is recommended to provide a more secure connection when using Agent Desktop outside the contact center.

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, you must restart Agent Desktop after the Chat service comes back online.

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

Logging Out

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

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

If you just log out, the software license remains in use and some features of Agent Desktop, such as Chat, are still available.

There are two methods of logging out and closing Agent Desktop.

Method 1: Logging Out and Then Closing Agent Desktop (Recommended)

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

To log out using Method 1:

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

Method 2: Closing Agent Desktop Without First Logging Out

With this method there is a small chance that the logout will not properly release the software license.

An agent can force the license to be released by using a forced login. See [Logging in Using Agent Desktop on page 10](#) for more information on forced logins.

To log out using Method 2:

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

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

Agent Desktop Interface

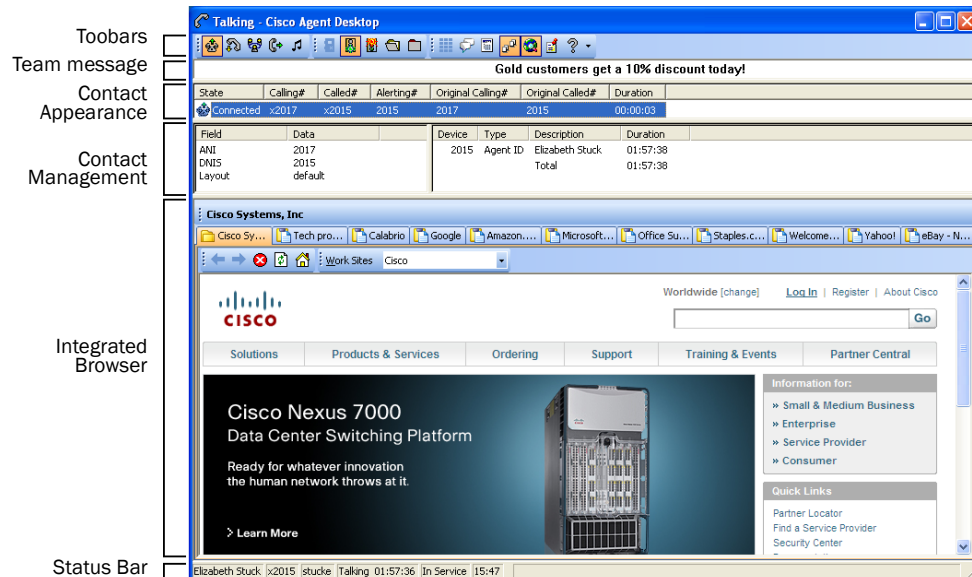
The Agent Desktop interface displays information about active calls and provides phone call handling functions. It also:

- Provides access to websites in its integrated browser
- Displays agent and call statistics in real time
- Allows you to record calls using task buttons (if configured by the administrator)
- Allows you to “chat” with other agents and supervisors using the Chat instant messaging feature

The interface has the following parts:

- Toolbars
- Team message pane
- Contact appearance pane
- Contact management pane
- Integrated browser tools

Figure 5. Agent Desktop interface



Accessibility

Agent Desktop has several features that improve accessibility for low-vision and vision-impaired users.

- Use of Windows settings for screen resolution, color/contrast, and font sizes
- Shortcut keys and tool tips that are compatible with screen readers
- Toolbar buttons in either small (16 × 16) or large (32 × 32) sizes
- Audible tones when a nonagent-initiated dialog appears (for example, new chat windows and agent notification about the supervisor barging in, intercepting, and recording)
- Scrolling or non-scrolling team messages

For information about configuring accessibility options, see ["Desktop Preferences" on page 27](#).

Toolbar Buttons and Shortcut Keys

The optional Cisco Unified Outbound Dialer toolbar can be configured to appear in Agent Desktop by your administrator. Depending on the dialing mode of the calling campaign that your administrator sets up, the toolbar will contain some or all of the available nine buttons. For a complete description of the toolbar, see ["Unified Outbound Dialer Toolbar" on page 49](#).

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

- Logging in and out
- Changing your agent state
- Initiating a chat session
- Viewing real-time displays
- Configuring the appearance of the Agent Desktop interface
- Handling Cisco Unified Outbound Dialer calls
- Starting and stopping call recordings (if task buttons are configured to perform these functions by your administrator)






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

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

The following tables list the toolbar buttons and shortcut keys that you can use in Agent Desktop.

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

Table 2. Call handling toolbar buttons and shortcut keys

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

[Table 3](#) lists the toolbar buttons and shortcut keys for changing agent state.

Table 3. Agent state toolbar buttons and shortcut keys







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

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

Table 4. Window management toolbar buttons and shortcut keys









Icon	Name	Shortcut	Description
	Task1-10	Alt+1, Alt+2... Alt+0	(Enhanced/Premium only) One to ten task buttons can be set up to perform one or several functions by the administrator.
	Make Call	Ctrl+M	Opens a window from which you can dial a call.
	Chat	Ctrl+J	Opens a window from which you can initiate a chat session.
	Real Time Display	Ctrl+Q	Opens a window that displays your call logs and statistics.
	Contact Mgmt	Ctrl+G	Shows or hides the Contact Management panes.
	Browser	Ctrl+B	(Premium only) Shows or hides the integrated browser pane.
	Preferences	Ctrl+P	Opens a window for configuring Desktop Preferences.
	Help/About	Alt+Ctrl+H	Opens a menu listing the Help and About options.
—	Server Status	Ctrl+Shift+S	Opens the Server Status window.

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

Table 5. Main window screen reader shortcut keys

Shortcut	Description
Ctrl+E	Selects a row in the Enterprise Data portion of the Contact Management pane. To open the Edit Enterprise Data dialog box and edit the selected entry, press Enter.
Ctrl+S	Selects a contact in the Contact Appearance pane.
Ctrl+Shift+B	Moves your cursor to the first tab position on the current web page of the integrated browser (if the page has fields you can navigate using the tab key).
Ctrl+Shift+E	Selects a row in the Contact Management Call Activity pane.

Table 5. Main window screen reader shortcut keys (cont'd)

Shortcut	Description
Ctrl+Shift+M	Selects the team message.
Ctrl+Shift+T	Shifts focus to the next web page of the integrated browser.

Table 7 lists the shortcut keys for the integrated browser window.

Table 6. Integrated browser window shortcut keys






Icon	Name	Shortcut	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 clicking the Back button.
	Stop	Esc	Stops the browser from loading a web page.
	Refresh	F5	Refreshes the current web page.
	Home	Alt+Home	Displays your predefined home page.
—	New tab	Ctrl+Shift+T	Opens a new tab in the foreground (if using tabs).
—	New tab	Alt+Enter	Opens a new tab in the foreground from the address bar.
—	Next tab	Ctrl+Tab	Takes you to the next tab.
—	New window	Ctrl+N	Opens a new window (if not using tabs).
—	Close tab	Ctrl+Shift+X	Closes the current tab (or current window if a popup).
—	Address	Alt+D	Moves the cursor to the Address field (if configured).
—	Browser	Ctrl+Shift+B	Moves the cursor to the browser pane.
—	Work Sites	Alt+W	Moves the cursor to the Work Sites field.
—	—	Shift+click	Opens a link in a new window.
—	—	Ctrl+click	Opens a link in a new tab in the background.
—	—	middle mouse button	Opens a link in a background tab.

Table 6. Integrated browser window shortcut keys (cont'd)

Icon	Name	Shortcut	Description
—	—	Ctrl+Shift+click	Opens a link in a new tab in the foreground.

Table 7 lists the shortcut keys for the Agent Real Time Displays window.

Table 7. Agent Real Time Displays window shortcut keys

Shortcut	Description
Alt+Y	Opens the Dates drop-down list. Available only when the Agent Call Log Display is selected.
Alt+Ctrl+E	Opens the Real Time Displays drop-down list.
Alt+Ctrl+S	Selects the first cell in the grid.

Table 8 lists the shortcut keys for the Dial Pad window.

Table 8. Dial Pad window shortcut keys

Shortcut	Description
Alt+P	Selects the first entry in the Employee Phone Book.

Team Message

The team message is a scrolling or non-scrolling message sent to you and the rest of your team by your supervisor for a specific length of time. You will receive a team message even when you are logged out, as long as you do not close Agent Desktop.

When there is no message, the team message pane is not visible. As soon as your supervisor sends your team a team message, the team message pane opens and the message scrolls across it.

Contact Appearance Pane

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

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

Table 9 lists the available fields.

Table 9. Contact Appearance fields

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

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

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

Contact Management Pane

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

Figure 6. Contact Management pane

Field	Data	Device	Type	Description	Duration
ANI	2017	2015	Agent ID	Elizabeth Stuck	00:01:17
DNIS	2015			Total	00:01:17
Layout	default				

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

Enterprise Data

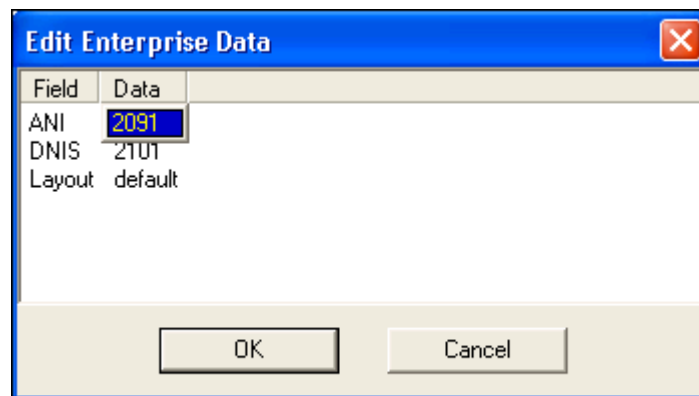
The enterprise data pane displays data associated with the selected call. The exact data that is displayed is configured by your administrator.

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 stays with the call when you transfer the call to another agent.

To modify a data field:

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

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



2. Modify the data.
3. Click OK.

Call Activity

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

Table 10. Call Activity fields

Field	Description
Device	List of devices the call passed through.
Type	Type of device the call passed through.
Description	Description of the device the call passed through.

Table 10. Call Activity fields (cont'd)

Field	Description
Total	Sum of all the durations listed.

Thresholds

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

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



Caution



Warning

Integrated Browser Pane

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

The integrated browser pane has the following parts:

- Integrated browser toolbar
- Work Sites drop-down list
- Editable Address field (if configured by the administrator)
- Browser

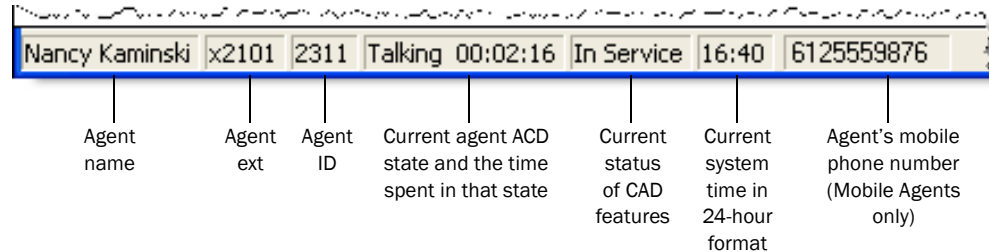
The integrated browser has from one to six tabs, each of which can display a different web page. The first tab is reserved for pages that your supervisor pushes to you to assist you in handling calls, and the remaining tabs are for general use. The number of tabs depends on the settings your administrator has configured.

For more information about this pane, see ["Using the Integrated Browser" on page 61](#).

Status Bar

The status bar displays current information about you and Agent Desktop ([Figure 8](#)).

Figure 8. Status bar



If a service fails, the status changes from “In Service” to “Partial Service” or “No Service”. To view the features that are affected by the service failure, double-click the status field. A popup window appears and displays the features that are active or inactive.

For more information on the status popup window and service autorecovery, see ["Service Autorecovery" on page 67](#).

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 ([Figure 9](#)) appears.
2. Select the preferences you desire on each tab, and then click OK.

Setting the Window Behavior and Window Options 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 and window options modes on the Preferences tab in the Desktop Preferences dialog box ([Figure 9](#)). The behavior you set persists from one session to the next session.

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 that your administrator selects.

Figure 9. Desktop Preferences window - Preferences tab

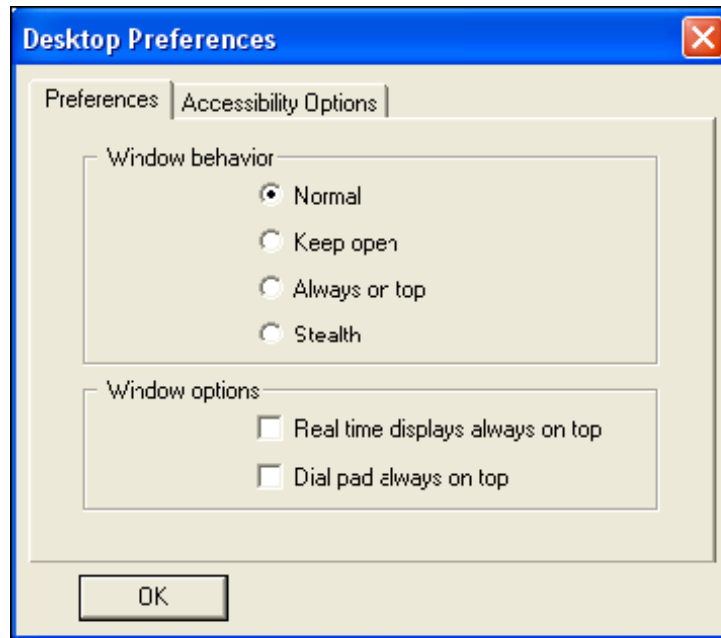


Table 11 lists the available modes.

Table 11. 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 does not appear unless double-clicked or if you receive a team message.

Table 12 lists the available window options.

Table 12. Window options

Option	Description
Real time displays always on top*	The Agent Real Time Displays window remains open when idle and on top of all other open applications.
Dial pad always on top*	The Dial Pad window remains open when idle and on top of all other open applications.

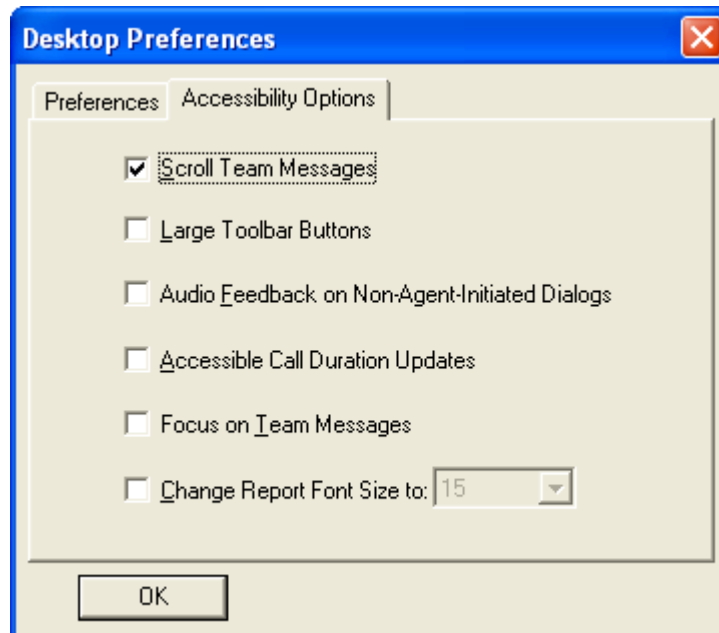
* If both real time displays and dial pad options are selected to be always on top, the most recent of the two windows you open will be on top.

Accessibility Options

Stationary team messages. If you use a screen reader with Agent Desktop, scrolling team messages (the default mode) can be difficult to read. You can turn off the scrolling feature and have stationary team messages by clearing the Scroll Team Messages check box on the Accessibility Options tab (Figure 10).

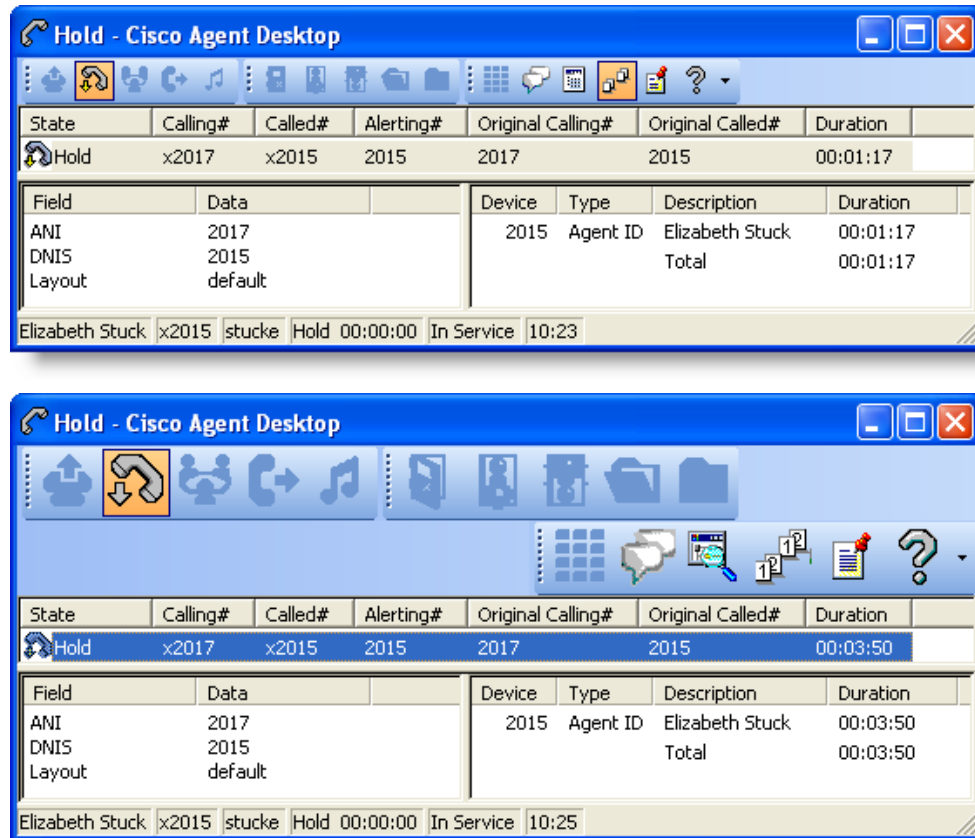
NOTE: Your selected team message behavior will persist from session to session. You do not need to reset this behavior every time you start Agent Desktop.

Figure 10. Desktop Preferences window - Accessibility Options tab



Icon Size. You can change the size of the buttons on the toolbar from the default 16 × 16 pixels to 32 × 32 pixels (Figure 11) by selecting the Large Toolbar Buttons check box. Note that if all of the toolbars do not fit on one row, one toolbar automatically moves to another row.

Figure 11. Small and large 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 someone other than you appears on your desktop. Examples of such dialogs are new chat windows and notices to you that a supervisor is barging in, intercepting, or recording your call.

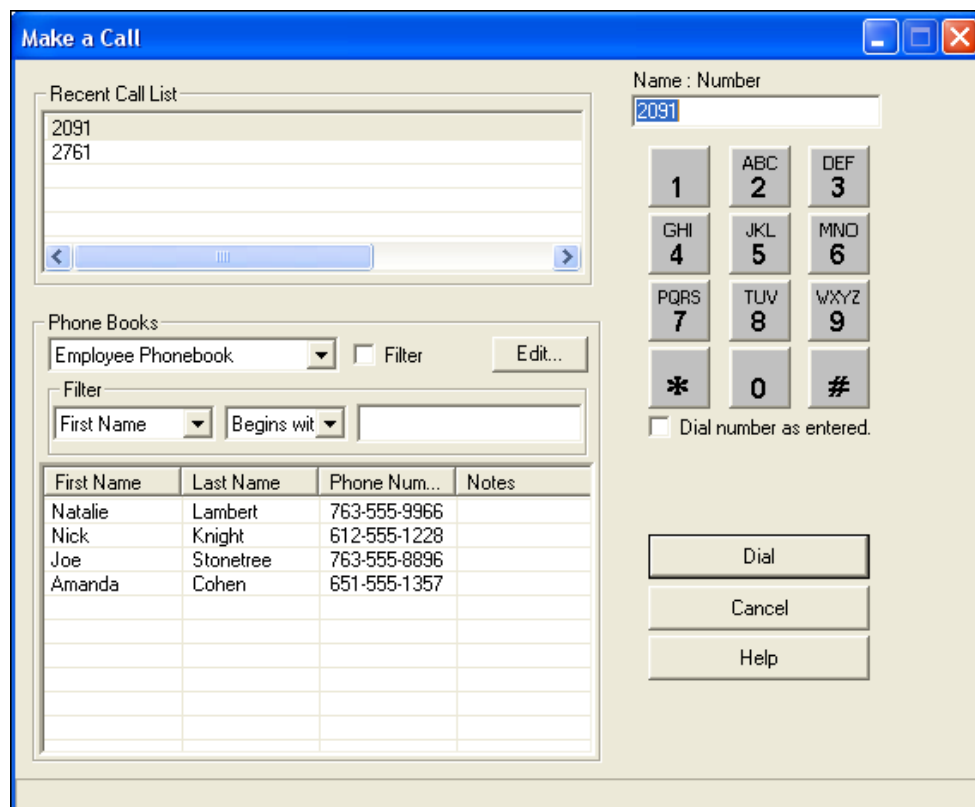
Call Duration. Select the Enable Call Duration Updates check box to enable the Duration field to increment during a call. By default this option is enabled. A continually changing field can cause difficulties for screen readers, so agents who are visually impaired might want to disable it.

Dial Pad Window

The dial pad window allows you to make phone calls by entering a number in the Name : Number field, by selecting a number from the recent call list, or by selecting a number from a phone book. You can enter the number either by typing it or by clicking the number keys. You can also press Alt+P to select the first entry in the Employee Phone Book.

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

Figure 12. Dial Pad window



Once you open the dial pad window, it can stay open while you switch to other windows. This allows you to use other Agent Desktop features, such as the integrated browser or real time displays, while waiting for a call you make to be answered.

When the dial pad window is open, all call control buttons in the main Agent Desktop window are disabled except for the Drop button. When you want to perform a call function other than the one performed by the open dial pad (for example, you want to

transfer a call and the Make a Call dial pad is open), you must close the open dial pad first and then click the appropriate button on the toolbar to open the type of dial pad window you need.

Recent Call List

When you dial a phone number, it is automatically stored in the recent call list. This list keeps up to 100 entries from newest to oldest. When the number of entries exceeds 100, the oldest phone number is removed from the list.

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 lists of phone numbers that are created by you (your employee phone book) and your administrator (public phone books). To choose a phone book, click the drop-down arrow.

NOTE: Your 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 your administrator. Your phone book can have an unlimited number of entries.

To edit your employee phone book:

1. In the dial pad window, choose Employee Phonebook from the Phone Books drop-down list, then click Edit. The Phone Book Editor window appears.

Figure 13. Phone Book Editor window

"Employee Phonebook" phone book

First Name

Last Name

Phone Number

Notes

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	

< >

Add Edit Delete

OK

2. Choose one of the following options.

NOTE: The Phone Number field allows the following characters only:

0-9, a-z, A-Z, and ' () + , - . / : = ? and space

If you type any other character, a message appears, listing the allowable characters. The disallowed character you typed is replaced by a question mark so you can change it to an allowed character.

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

- To edit an existing entry, select it to display it in the edit fields, click Edit, then make your changes.
 - To delete an entry, select it, then click Delete.
3. When your edits are complete, click OK.

Phone Book Filter

You can use the phone book filter to find phone book entries more easily. The filter enables you to limit the entries listed in the phone book window. You can use any of the four phone book fields to filter the entries.

To use the phone book filter:

1. In the dial pad window ([Figure 12 on page 31](#)), select the Filter check box.
2. From the Filter drop-down lists, select how you want to filter the entries. In the first two drop-down lists, select your filter criteria: the field to filter by, and the filter method. In the third field, enter the filter string.

For example, if you want to see all phone book entries for persons whose last name begins with “J,” select “Last Name” from the first drop-down list, “Begins with” from the second drop-down list, and enter “J” in the third field.

The filter operates as soon as you enter your filter string in the third field.

3. To stop filtering the phone book, clear the Filter check box or delete the filter string in the third field. The entire phone book will once again be visible.

Name : Number Field

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

John Doe: 612-555-1212

You 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 might automatically add the local access and long distance access codes to numbers you enter. Contact your administrator for details.

Dial Number as Entered Check Box

To prevent automatic formatting (such as local access and long distance access codes), select the Dial Number as Entered check box before clicking Dial. When you select this check box, Agent Desktop dials the number exactly as you entered it in the Name : Number field.

Handling Calls

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

NOTE: If you are logged in as a mobile agent, you must use the Agent Desktop interface to handle calls.

Entering Phone Numbers

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

- 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 might not have to include the local access or long-distance access codes. Consult your 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 of these methods.

Answering a Call

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

To answer a call:

- Click Answer.

To terminate a call:

- Click Drop.

Making a Call

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

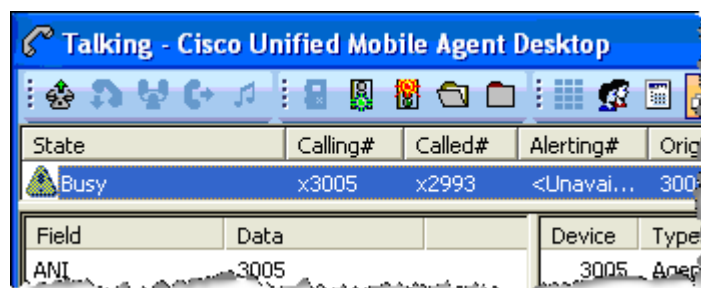
To make a call:

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

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

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

Figure 14. Mobile Agent - Busy state



Entering Touch Tones During a Call

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

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

To enter touch tones:

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

Figure 15. Touch Tones number pad

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

Entering Touch Tones During a Consultative Call (Transfer or Conference)

You might also need to send touch tones during a **consultative** call. For example, after you open the Conference a Call window and dial a number, you might be prompted by an IVR to enter one or more numbers indicating a menu choice. You can send touch tones during a consultative call either by clicking the appropriate buttons in the Touch Tones window or by typing the appropriate numbers in the Dial Pad window.

To enter touch tones during a consultative call:

1. During a call, click Transfer or Conference. The Transfer a Call window or Conference a Call window appears.
2. Enter a number, then click Dial. The destination phone rings.
3. At the IVR prompt, select the Touch Tones check box, then enter the required digits and/or symbols using either the number pad or the keypad on the PC keyboard. The appropriate tone is generated immediately after each digit or symbol you enter.
4. When you are finished, clear the Touch Tones check box. The touch tones function is disabled.

NOTE: The Touch Tones check box is automatically cleared when you close the Transfer a Call or Conference a Call 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 cannot confirm if the third party is ready to accept the call.
- **Supervised transfers.** In a supervised transfer, you speak to the third party to whom the call is being transferred before connecting the active call, in order to confirm that the third party is ready to accept the call. The Alternate function allows you to put the third party on hold and pick up the original call before completing the transfer.

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

To transfer a call:

1. With a call active, click Transfer. The Transfer a 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 is renamed Transfer.
4. Take one of the following actions:
 - For a blind transfer, click Transfer when the phone starts ringing.
 - For a supervised transfer, wait for the phone to be answered, then announce the transfer. If you want to place the new call on hold and pick up the original call, click Alternate. Then click Transfer.

Making a Conference Call

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

There are two types of conference calls:

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

- **Supervised conference.** In a supervised conference, you speak to the third party you want to add to your call before completing the conference, in order to confirm that the third party is ready to accept the call. The Alternate function allows you to put the third party on hold and pick up the original call before completing the conference.

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

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

To make a conference call:

1. With a call active, click Conference. The Conference a Call 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.
5. To add one or more people to the conference call, repeat Steps 1 to 4 for each person.

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

Supervisor Involvement

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

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

Call Involvement

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

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

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

Browser Involvement

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

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

Agent State Involvement

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

Agent States

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

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

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

Table 13 lists the available agent states.

Table 13. Agent states

State	Description
Hold	You are on the phone with a customer and have the call on hold. This state is automatically set for you by the ACD and does not have a corresponding button.
Logout	You are logged out of the ACD.
Not Ready	You are not available to receive ACD calls.
Ready	You are available to receive ACD calls.
Reserved	<p>You are temporarily set aside to receive a specific ACD or Unified Outbound Dialer call. Your state changes to the Talking state when you answer the call.</p> <p>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.</p> <p>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).</p>
Talking	You are on the phone with a customer or another agent. This state is automatically set for you by the ACD and does not have a corresponding button.
Work Not Ready	<p>You are completing work from a previous call, and are unavailable to receive ACD calls. You change to the Not Ready state when:</p> <ul style="list-style-type: none">• You enter wrap-up data (if enabled by the system administrator)• A timer set in the ACD expires (if the ACD uses this feature)• You manually change state after you enter wrap-up data

Table 13. Agent states (cont'd)

State	Description
Work Ready	<p>You are completing work from a previous call, and are available to receive ACD calls. You change to the Ready state when:</p> <ul style="list-style-type: none">• You enter wrap-up data (if enabled by the system administrator)• A timer set in the ACD expires (if the ACD uses this feature)• You manually change state after you enter wrap-up data

Using Chat

Chat enables you to send instant messages to your teammates and supervisors. In addition, if your configuration include Cisco Unified Presence Server, you might be able to send instant messages to non-agents who are using Unified Presence Client.

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

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

NOTE: If you log out during a chat, your copy of the chat log is lost, the current Chat window closes, and a new Chat window opens so you can continue communicating. The entire chat log is still present in the other party's Chat window.

Some Chat features include:

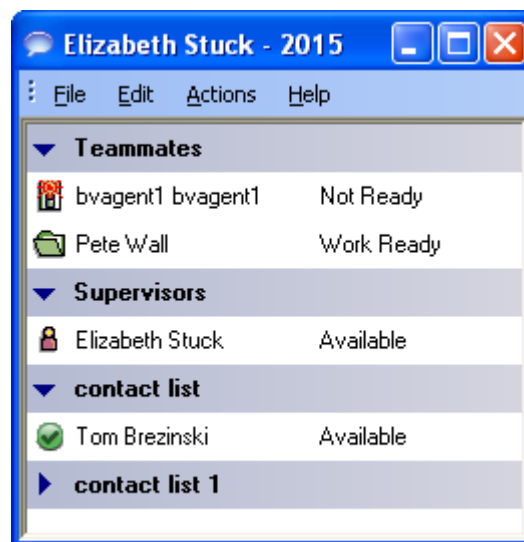
- A chat session is between you and one other party.
- You can participate in multiple concurrent chat sessions.
- The title bar of the Chat window displays the name of the person with whom you are chatting.
- If you flag a chat message as high priority, the Chat window will pop on the other person's screen so the message will be noticed immediately.
- 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 (chat history) is available as long as the Chat window is open. After you close the Chat window, the log is deleted.
- Chat history is in chronological order, with the oldest messages at the top of the log pane.
- You can send and receive chat messages even if you are logged out of the ACD, as long as Agent Desktop remains open.

To initiate a chat session:

1. On the toolbar, click Chat. The Chat Selection window appears (Figure 16).

NOTE: The window lists the names and status of people with whom you can chat: teammates, supervisors, members of your contact lists (if you are logged into Unified Presence), and participants in any conference call you are on.

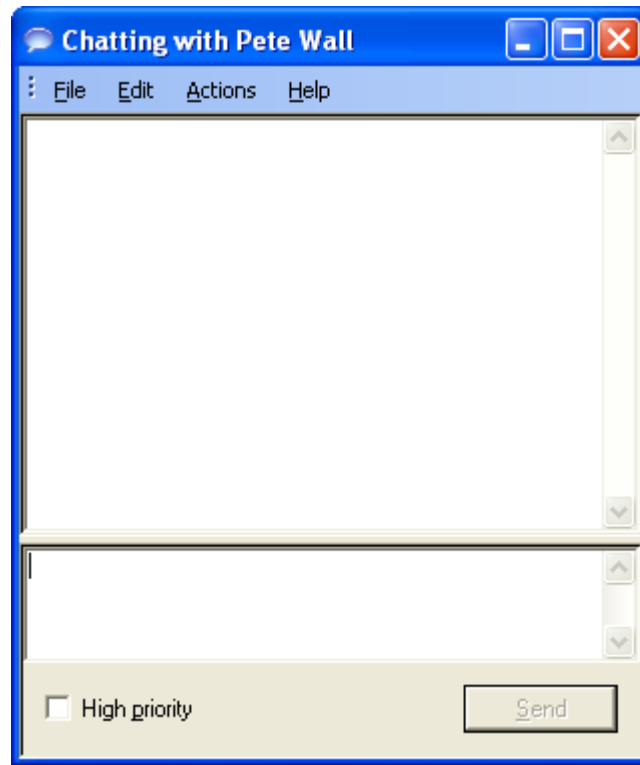
Figure 16. Chat Selection window



This Chat Selection window displays four contact lists, named Teammates, Supervisors, contact list, and contact list 1. The first two contact lists are defaults and are always available. The last two contact lists are customizable and are available only when the agent is logged into Unified Presence. Note that the last contact list is closed (the members are not visible).

2. Double-click the name of the person with whom you want to chat. A Chat window opens and a session begins with the person you selected ([Figure 17](#)).

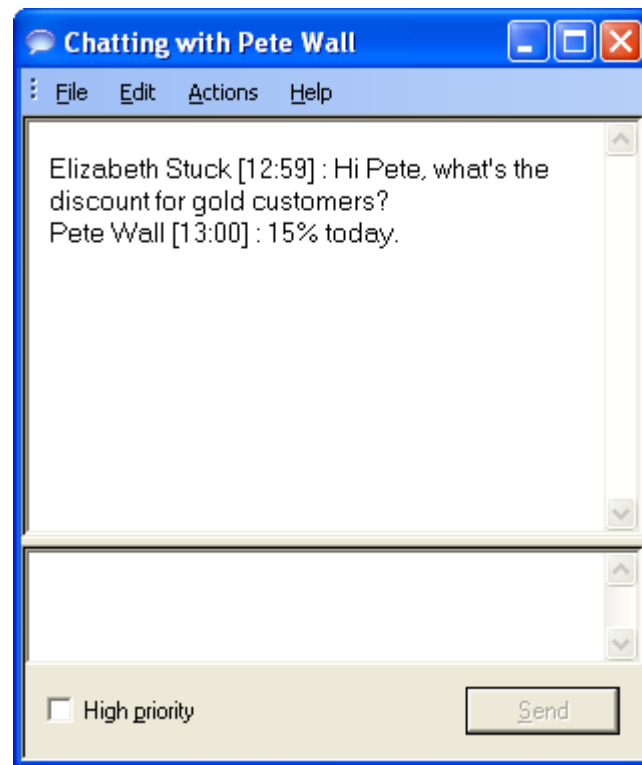
Figure 17. Chat window



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.

Figure 18. Chat window



To terminate a chat session:

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

High-Priority Chat Message Task Button

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

Using Recording

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

NOTE: The default task buttons are green circles with numbers inside them (for example, 1). Using them on the Agent Desktop toolbar is optional. Your administrator might choose to use other buttons for the recording function.



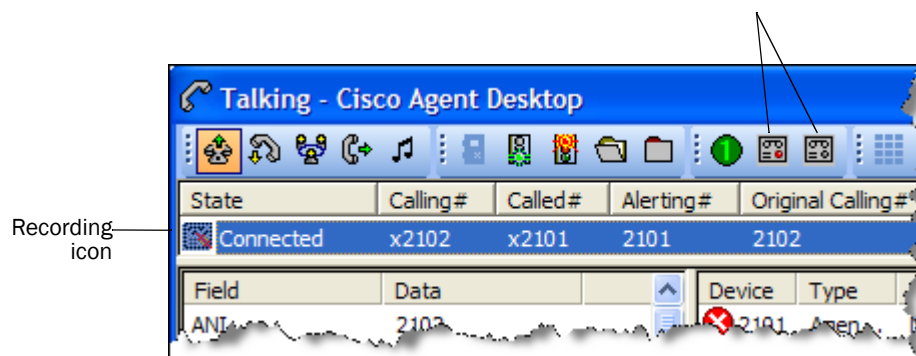
When you are recording a call, the icon next to the call information in the Call Activity pane changes from the Talking icon () to the Recording icon () (Figure 19).

Figure 19. 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 the Start Recording button.
- The recording ends automatically when the call terminates, or when you click the Stop Recording button, whichever comes first.
- You cannot use the Stop Recording button to stop a recording that your supervisor started. If you do click Stop Recording in this situation, the recording icon will disappear from the Call Activity pane, but the call will still be recorded until your supervisor stops it.
- Your supervisor can stop a recording that you started.
- Only your supervisor can play back recordings that you make.

Cisco Unified Outbound Dialer

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

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

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

Unified Outbound Dialer Toolbar

Table 14 displays the Unified Outbound Dialer toolbar buttons, and describes their function and which dialing mode they are used with.

Table 14. Unified Outbound Dialer toolbar buttons and their functions



Icon	Name, shortcut, and description	DPrev	Pred	Prev	Prog
	Accept (Alt+Shift+A) The system dials the customer and transfers the call to you.	×	×	×	×
	Reject (Alt+Shift+R) The system rejects the current call and releases you from the outbound calling reservation. At this point, the system can deliver to you another outbound call or a new inbound call.	×		×	

Table 14. Unified Outbound Dialer toolbar buttons and their functions (cont'd)








Icon	Name, shortcut, and description	DPrev	Pred	Prev	Prog
	Reject Close (Alt+Shift+U) The system rejects the current call and closes the record so it will not be called again.	×		×	
	Skip (Alt+Shift+S) The system skips the current call and presents you with another customer call.	×		×	
	Skip Close (Alt+Shift+T) The system skips the current call and closes the record so it will not be called again.	×		×	
	Skip-Next (Alt+Shift+K) The system skips the call and displays a menu of these options: <ul style="list-style-type: none"> Wrong Number (Alt+Shift+W): the agent is informed that the number called is a wrong number. After the call terminates, the system calls other customer phone numbers Not Home (Alt+Shift+N): the agent is informed that the customer is not home. After the call terminates, the system calls other customer phone numbers 	×	×	×	×
	Callback (Alt+Shift+C) Displays the Callback Properties dialog box (Figure 21 on page 52). This dialog box enables you to set a date and time to call back the customer. Callback is enabled only if you are in a talking or wrap-up state on an Unified Outbound Dialer call.	×	×	×	×
	Reclassify (Alt+Shift+Q) Displays a menu that enables you to reclassify a customer phone number as: <ul style="list-style-type: none"> Voice (Alt+Shift+V) Answering Machine (Alt+Shift+M) Fax/Modem (Alt+Shift+F) Invalid Number (Alt+Shift+I) 	×			

Table 14. Unified Outbound Dialer toolbar buttons and their functions (cont'd)

Icon	Name, shortcut, and description	DPrev	Pred	Prev	Prog
	Cancel Reservation (Alt+Shift+D) The system releases you from the calling campaign and places you in the Not Ready state. To resume participating in the calling campaign, you must change your state to Ready.	x	x	x	x

Key

DPrev = Direct Preview

Pred = Predictive

Prev = Preview

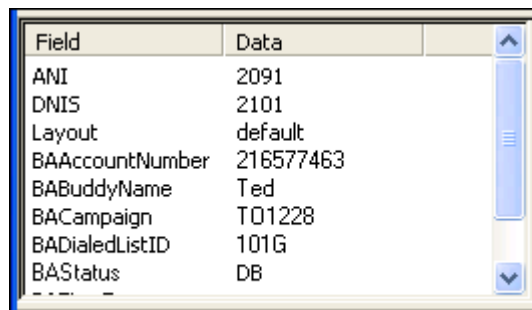
Prog = Progressive

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

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

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

Figure 20. Unified Outbound Dialer data (Enterprise Data pane)



Field	Data
ANI	2091
DNIS	2101
Layout	default
BAAccountNumber	216577463
BABuddyName	Ted
BACampaign	TQ1228
BADialedListID	101G
BASTatus	DB

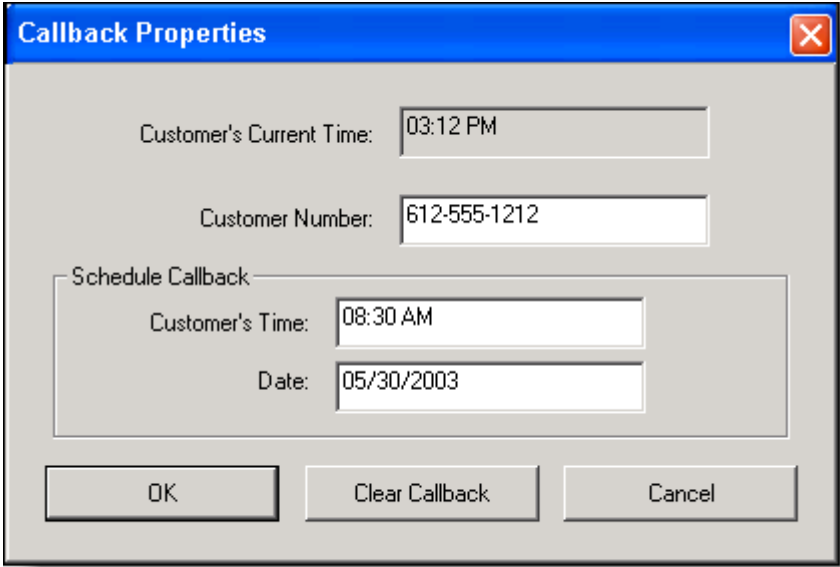
Customer Callback

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

To schedule a customer callback:

1. While in Talking or Wrap-up state, click Callback. The Callback Properties dialog box appears, displaying data about the current customer call ([Figure 21](#)).

Figure 21. Callback Properties dialog box



Callback Properties

Customer's Current Time: 03:12 PM

Customer Number: 612-555-1212

Schedule Callback

Customer's Time: 08:30 AM

Date: 05/30/2003

OK Clear Callback Cancel

2. In the Schedule Callback section, type a time (HH:MM) and date (MM/DD/YYYY) to call back the customer. You can enter the time in 12-hour or 24-hour format. If using the 12-hour format, you must type AM or PM.
3. If the customer wants to be contacted at a different phone number, type that number in the Customer Number field.

NOTE: The time you enter in the Customer's Time field must be the time in the customer's location, not the time in your location.

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

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

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

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

Agent Real Time Displays

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

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

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

To view a real time display:

1. On the toolbar, click Real Time Displays. The Agent Real Time Displays window appears.
2. From the Real Time Displays drop-down list, select the display you want to view. The selected display appears. You can update the information by clicking the Refresh button.

Display Status

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

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

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

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

Agent ACD State Log Display

The Agent ACD State Log Display (Figure 22) shows a record of all ACD server state transitions for the current day. The log is in chronological order.

Figure 22. Agent ACD State Log Display

Start Time	Agent State	Wrap-up Data	Reason Code	State Duration
09:17:10	Login		0	00:00:00
09:17:10	Logout		0	00:00:00
09:17:10	Not Ready		0	00:09:28
09:26:38	Logout		0	00:00:00
09:26:39	Logout		0	00:02:22
09:29:00	Logout		0	00:21:15
09:29:02	Logout		0	00:00:00
09:29:02	Not Ready		0	00:00:00
09:50:15	Logout		50003	00:00:00
09:50:15	Not Ready		0	00:00:00
10:38:30	Login		0	00:00:00

Real Time Display: Active

Table 15 describes the fields that are listed in the Agent ACD State Log Display.

Table 15. Agent ACD State Log Display field descriptions

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

Table 15. Agent ACD State Log Display field descriptions

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

Agent Detail Display

The Agent Detail Display (Figure 23) shows your performance statistics for the current day. This information is refreshed automatically every 10 seconds.

Figure 23. Agent Detail Real Time Display

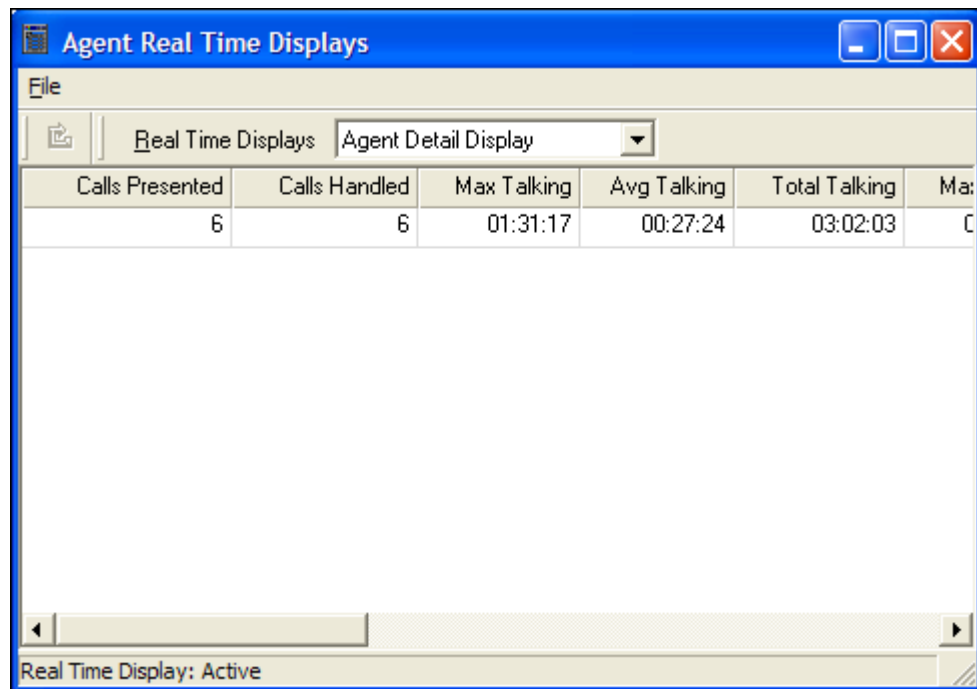


Table 16 describes the fields that are listed in the Agent Detail Display.

Table 16. Agent Detail Display field descriptions

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

Agent Call Log Display

The Agent Call Log Display (Figure 24) shows a record of calls made and received over the last seven days, by day.

Figure 24. Agent Call Log Display

Start Time	Direction	Answered	Calling Party	Called Party	Call Duration
10:10:47	Inbound	Yes	2101	2072	00:11:00
10:53:55	Inbound	Yes	2102	2101	00:23:14
11:27:19	Inbound	Yes	2102	2101	01:31:19
13:14:05	Inbound	Yes	2102	2101	00:10:04
13:27:34	Inbound	Yes	2102	2101	00:15:59
13:50:49	Inbound	Yes	2102	2101	00:12:58

Table 17 describes the fields that are listed in the Agent Call Log Display.

Table 17. Agent Call Log Display field descriptions

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

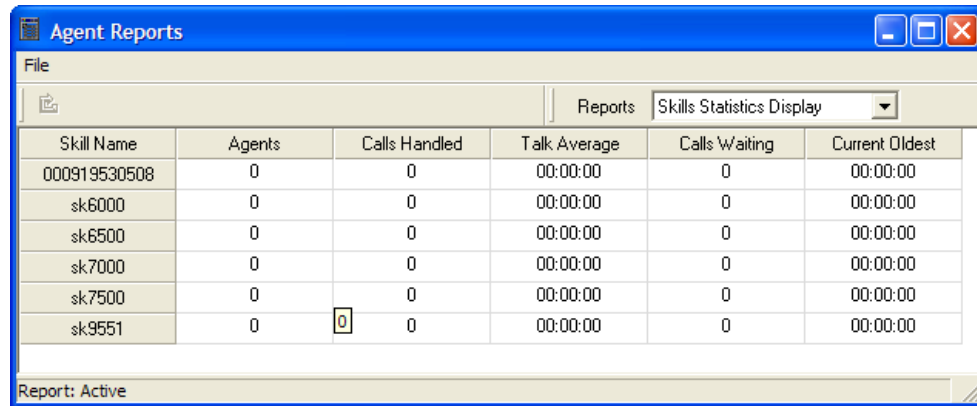
Table 17. Agent Call Log Display field descriptions (cont'd)

Field	Description
ACD Line	Indicates if the call came in on an ACD (Yes) or non-ACD (No) line.

Skills Statistics Display

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

Figure 25. Skills Statistics Display



Skill Name	Agents	Calls Handled	Talk Average	Calls Waiting	Current Oldest
000919530508	0	0	00:00:00	0	00:00:00
sk6000	0	0	00:00:00	0	00:00:00
sk6500	0	0	00:00:00	0	00:00:00
sk7000	0	0	00:00:00	0	00:00:00
sk7500	0	0	00:00:00	0	00:00:00
sk9551	0	0	00:00:00	0	00:00:00

Report: Active

0. [Table 18](#) describes the fields that are listed in the Skills Statistics Display.

Table 18. Skills Statistics Display field descriptions

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

Table 18. Skills Statistics Display field descriptions (cont'd)

Field	Description
Calls Waiting	Number of calls currently queued to the skill group.
Current Oldest	Duration of the oldest call in the queue.

Using the Integrated Browser

The integrated browser feature is available in the CAD Premium package. This feature allows you to view intranet and internet web pages while working within Agent Desktop. The browser window can display up to six tabs, each containing a different web page. The first tab is always reserved for web pages that your supervisor pushes to you. Your administrator can configure specific web pages to display in each browser tab. If the administrator does not do this, the tab is blank.

NOTE: 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.

NOTE: Internet Explorer must be installed on your PC for the integrated browser to function correctly.

You can click Show/Hide Integrated Browser on the Agent Desktop toolbar to show or hide the integrated browser pane.

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

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

Browser Toolbar

The browser toolbar is a basic web browser 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 and shortcut keys






Icon	Name	Shortcut	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 clicking the Back button.
	Stop	Esc	Stops the browser from loading a web page.
	Refresh	F5	Refreshes the current web page.

Table 19. Browser toolbar buttons and shortcut keys (cont'd)

Icon	Name	Shortcut	Description
	Home	Alt+Home	Returns you to your predefined home page.
—	Next tab	Ctrl+Shift+T	Takes you to the next tab.
—	Address	Alt+D	Moves the cursor to the Address field (if configured).
—	Browser	Ctrl+Shift+B	Moves the cursor to the browser pane.
—	Work Sites	Alt+W	Moves the cursor to the Work Sites field.
—	Specified Tab	Ctrl+<tab #>	Takes you to the specified tab, where 0 is the first tab, 1 is the next tab, and so on.

Accessing Work Sites

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

Accessing Other Websites

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

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

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

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

To access a website using the Address field:

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

Dialing Hyperlinked Phone Numbers

If enabled by your administrator, you can dial a phone number displayed as a hyperlink on a web page merely by clicking it.

- The phone number must be 10 digits long and use the North American dial string format:
(3-digit area code)(3-digit exchange number)(4-digit subscriber number)
Shorter numbers, such as local numbers without area codes or phone extensions, cannot be dialed.
- The phone number can have parentheses around the area code, and use any combination of space, hyphen, and period in the phone number.
- The phone number cannot contain alpha characters. For instance, the phone number 800-GET-PZZA cannot be dialed.
- You can dial a hyperlinked phone number only if 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 the Refresh button on the integrated browser toolbar.

Supervisor Intervention

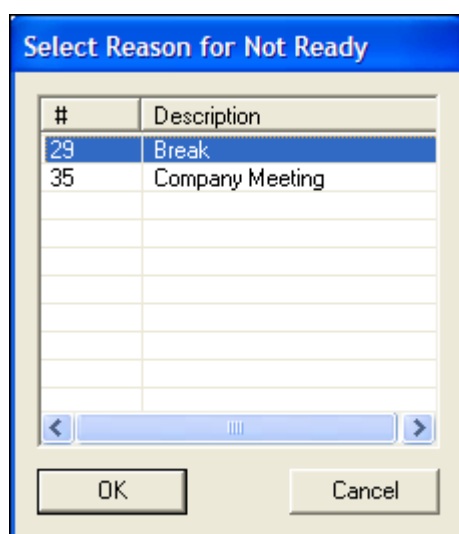
Your supervisor can “push” a web page to your browser. See ["Browser Involvement" on page 41](#) for details.

Reason Codes

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

If you are required to use reason codes, whenever you initiate a transition to Not Ready or Logout, or such a transition is included in a work flow, a dialog box appears (Figure 26). You must select the appropriate code from that dialog box and click OK or press Enter to complete the transition. If desired, you can sort the reason codes by number or description by clicking the appropriate column header.

Figure 26. Reason Code dialog box



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

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

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

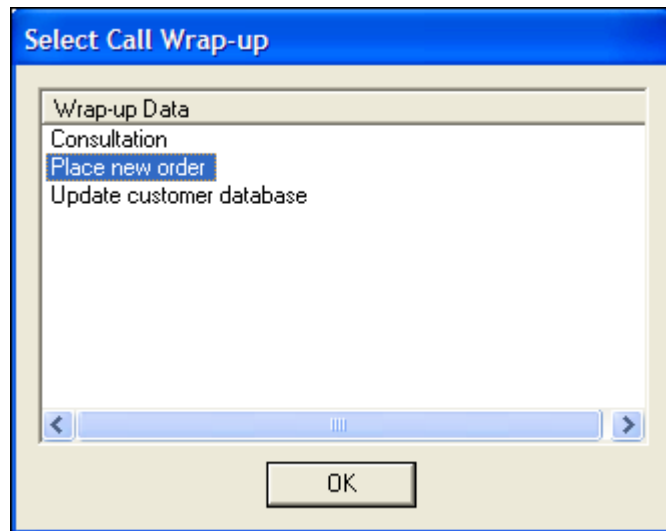
- Your agent state is changed automatically from Ready to Not Ready when you receive a non-ACD call

Wrap-up Data

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

If you are required to use wrap-up data, whenever your state changes to Work Ready or Work Not Ready immediately after you end a call, the Select Call Wrap-up dialog box appears (Figure 27). (This occurs when you click the Work Ready or Work Not Ready button during a call.) You must select the appropriate description from the dialog box and click OK or press Enter to complete the transition. If desired, you can sort the descriptions by clicking the column header.

Figure 27. Wrap-up Data dialog box



Service Autorecovery

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

If you log back in within 20 minutes after service recovery using the same login name/ID and password, your state will automatically be the same as the state you were in when the service or network connection failed.

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

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

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

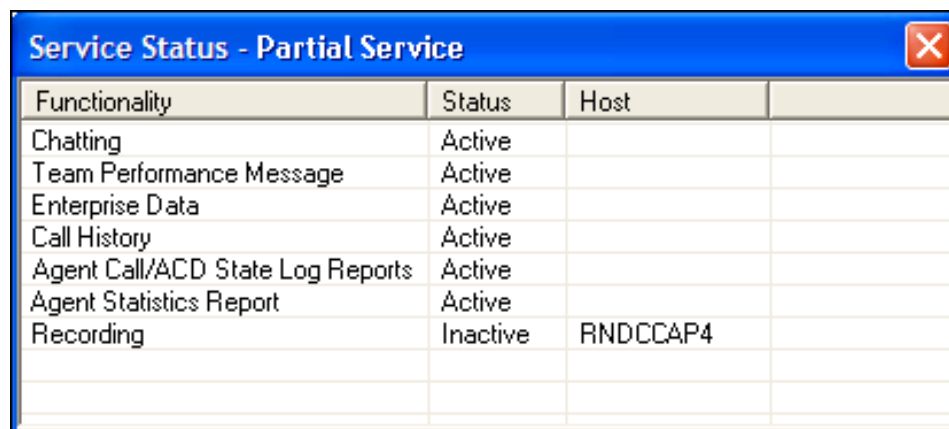
NOTE: When Unified Communications Manager (Unified CM) fails, you are logged out. You must manually log back in after Unified CM recovers; login is not automatic.

Service Status Window

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

service outage ([Figure 28](#)).

Figure 28. Service Status popup window



The image shows a Windows-style popup window titled "Service Status - Partial Service" with a red close button in the top right corner. Inside the window is a table with four columns: "Functionality", "Status", "Host", and an empty column. The table contains the following data:

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

Loss of BIPPA Service

Non-Redundant Systems

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

Redundant Systems

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

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

Loss of CTI Service

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

Loss of LDAP Service

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

Loss of LRM Service

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

Loss of Other Services

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

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