Cisco Agent Desktop—Browser Edition User Guide

CAD 8.5 for Cisco Unified Contact Center Express Release 8.5
Cisco Unified Communications Manager Express Edition

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Introduction

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

CAD-BE provides ACD state control—ready/not ready, wrap-up, work, and login/logout. Customer information is presented to the agent through an enterprise data pane. CAD-BE also provides an integrated browser window so agents can view intranet, internet, and web application pages as needed.

Intended Audience

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

What's New In This Release

CAD-BE 8.5 includes the following new features:

- Support for 32-bit Microsoft Windows 7 Professional, Enterprise, and Ultimate
- Support for 64-bit Microsoft Windows 7 running the 32-bit Windows on 64-bit Windows (WoW64) emulation layer
- Support for Microsoft Internet Explorer 8 and Mozilla Firefox 3.6
- Support for JRE 1.6.0 Update 24 through Update 31

Obtaining Documentation and Submitting a Service Request

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CAD-BE Interface

The CAD-BE interface (Figure 1) displays information about active calls. It also provides access to websites via its integrated browser toolbar.

The interface has the following parts:

- Toolbar

- Contact appearance pane

- Contact management pane

- Integrated browser tools

- Status bar

NOTE: Internet Explorer 7 and 8 has a security feature that places a non-editable address bar directly below the title bar in the CAD-BE interface. To remove this address bar, choose Tools > Internet Options, select the Security tab, and select either the Local intranet zone or the Trusted sites zone. Click Sites, then click Add. This adds the CAD-BE website to the zone you selected. (The Local intranet and Trusted sites zones have the setting "Allow websites to open windows without address or status bars" enabled.)

Figure 1. CAD-BE interface
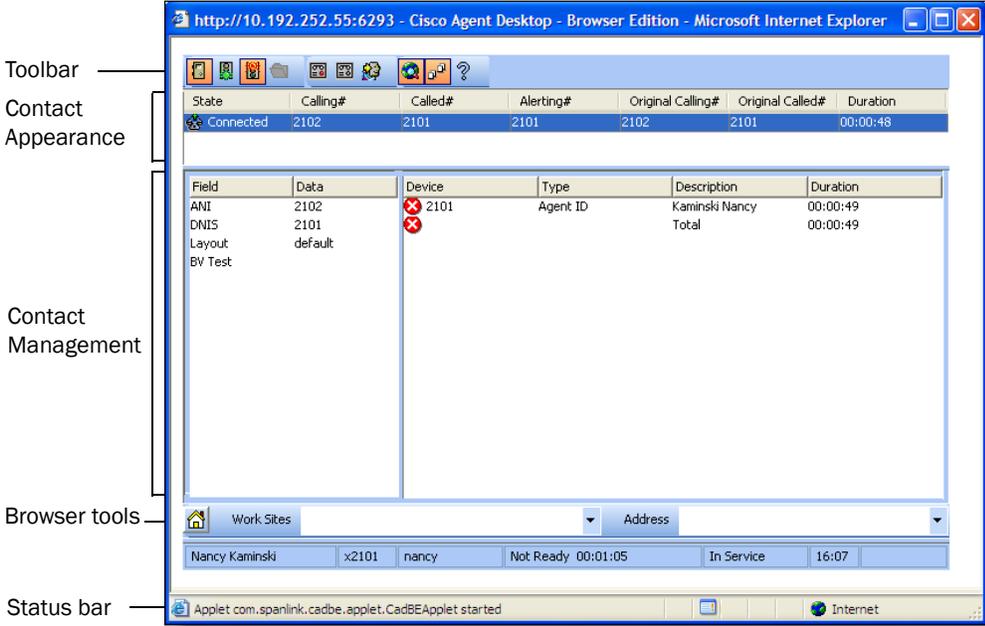
Toolbar Buttons and Shortcut Keys

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

- Logging in and out

- Changing your agent state

- Configuring the appearance of the CAD-BE interface

- Starting and stopping call recordings (if task buttons are configured to perform these functions by your administrator)

Buttons on the toolbar are disabled if they control a function that is unavailable in your current situation. To view the name of a button, move the cursor over the button.

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

The following tables list the toolbar buttons and shortcut keys that you can use in CAD-BE.

Table 1 lists the toolbar buttons and shortcut keys for changing agent state.

Table 1.   Agent state toolbar buttons and shortcut keys

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

Table 2 lists the toolbar buttons and shortcut keys for managing windows.

Table 2.   Window management toolbar buttons and shortcut keys

Icon	Name	Shortcut	Description
	Task1–10	Alt+1, Alt+2, …, Alt+0	One to ten task buttons can be set up to perform one or several functions by the administrator.
	Contact Mgmt	Ctrl+G	Shows or hides the Contact Management panes.
	Browser	Ctrl+B	Shows or hides the integrated browser pane.
	Help/About	Alt+Ctrl+H	Opens a menu listing the Help and About options.

Table 3 lists the shortcut keys for moving the cursor to various text elements in the CAD-BE interface so a screen reader can read the text.

Table 3.   Main window screen reader shortcut keys

Shortcut	Description
Ctrl+E	Selects a row in the Enterprise Data portion of the Contact Management pane.
Ctrl+S	Selects a contact in the Contact Appearance pane.

Contact Appearance Pane

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

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

Table 4 lists the available fields.

Table 4.   Contact Appearance fields

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

Table 4.   Contact Appearance fields (continued)

Field	Always Visible?	Description
Called#	No	The number of the destination device.
Alerting#	No	The number of the ringing device.
Original Called#	No	The original number called.
Original Calling#	No	The initial originating number.
Duration	Yes	The length of the call.

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

The information displayed in the Contact Appearance pane might differ from the information displayed in the Enterprise Data pane because contact appearance data reflects the current data, while the enterprise data is reflects the original call.

Contact Management Pane

The contact management pane contains enterprise data (on the left) and call activity information (on the right) for all inbound and outbound calls. You can click the Show/Hide Contact Management button on the toolbar to show or hide the contact management pane.

Enterprise Data

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

Call Activity

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

Table 5 lists the Call Activity fields.

Table 5.   Call Activity fields

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

Table 5.   Call Activity fields (continued)

Field	Description
Duration	The amount of time the call is at the device.
Total	Sum of all the durations listed.

NOTE: Some calls can be on multiple devices simultaneously. For example, if a call is placed in multiple queues or is conferenced to multiple extensions, the call activity section displays the duration of the call on each individual device, and overlapping times are not indicated. In this case the total duration is the sum of the time spent on these overlapping devices, and is greater than the actual amount of time the call spends in the contact center.

Thresholds

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

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

 Caution   Warning

Integrated Browser Pane

The integrated browser pane contains controls that allow you to view web pages to help you assist customers. The web pages are displayed in an associated browser outside the CAD-BE applet.

Your administrator can configure a specific website to display as your home page, and add a list of work sites (similar to web browser "favorites") that allow you to navigate to frequently-used websites quickly.

The integrated browser pane has the following parts:

■   Home button

■   Work Sites drop-down list

■   Editable Address field (if configured by the administrator)

For more information about this pane, see "Using the Integrated Browser" on page 23.

Status Bar

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

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

For more information on the Current Status popup window and service autorecovery, see "Service Status" on page 27.

Figure 2.   Status bar

| Nancy Kaminski | x2046 | kaminsn | Not Ready 00:06:20 | Partial Service | 09:41 |

Agent name
Agent extension
Agent ID
Current agent ACD state and the time spent in that state
Current status of CAD-BE features
Current system time in 24-hour format
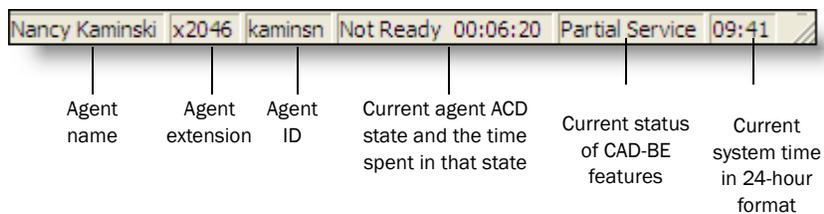
Cisco IP Communicator

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

You must start IP Communicator manually (it does not start automatically when you start CAD-BE).

1.

Starting CAD-BE and Logging In

CAD-BE runs in the following web browsers:

Operating System	Supported Browsers
Microsoft Windows XP Professional with Service Pack 2 and 3	Microsoft Internet Explorer 7 and 8 Mozilla Firefox 3.6
Microsoft Windows Vista Business, Enterprise, and Ultimate Editions	Microsoft Internet Explorer 7 and 8 Mozilla Firefox 3.6
Microsoft Windows 7 Professional, Enterprise, and Ultimate Editions	Microsoft Internet Explorer 8 Mozilla Firefox 3.6
Red Hat Enterprise Linux 5	Mozilla Firefox v3

Your system must have the Java Runtime Environment (JRE) plug-in version 1.6.0 installed. Only JRE 1.6 Update 24 through Update 31 are supported. All popup blockers must be disabled. Consult your administrator for instructions on disabling your popup blockers, if any.

Problems with JRE

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

CAD-BE might function with other browsers and JRE versions, but these configurations are not supported.

Logging In

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

To log in:

1. Start your web browser.

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

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

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

   NOTE: A warning might appear stating that this website's certificate cannot be verified. To prevent this warning from displaying again, select the check box Always trust content from this publisher, then click Yes to launch CAD-BE. Do not click No. If you click no, then CAD-BE will not launch.

   NOTE: A warning might appear, stating that the CAD-BE digital signature cannot be verified. This means that the web browser cannot verify the digital signature with a trusted source. To prevent this warning from displaying again, select the check box Always trust content from this publisher, then click Run to launch CAD-BE. Do not click Cancel. If you cancel, CAD-BE will run in restricted mode and some features will not function correctly.

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

   Figure 3. Login window

4. Type your login name/ID, password, and extension in the appropriate fields, then click OK. You are now logged into CAD-BE in the Not Ready state.

   ■ If you enter a login name/ID that is already in use by another agent, a dialog box appears, asking if you want to log out the ID. If you choose yes, the agent using that ID will be logged out and you will log in.

■ If you enter an extension that is already in use by another agent, an error message appears, stating that the extension is already in use. You must enter a different extension to log in.

NOTE: If your team assignment is changed while you are logged in, then you must restart CAD-BE for the change to go into effect.

Login Notes

■ The Login Name/ID field has a maximum of 32 characters. The Password and Extension fields have a maximum of 64 characters.

■ When you log in, you might see the error message, "A licensing error has occurred. Please see your administrator." This generally appears when all agent software licenses are in use. For this reason, it is important that you log out of CAD-BE when you are done using it, rather than simply closing your browser.

Access Through a VPN From Behind a NAT Firewall or Router

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

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

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.

It has been verified that Cisco VPN 3000 Concentrator and Cisco VPN Client work properly with CAD 9.0 and are supported for access. VPN solutions from other vendors might result in feature loss. Because they have not been formally verified, they are not supported. If you want an alternative solution to be verified, please contact your Cisco distributor.

VPN Tunneling

There are two types of VPN tunneling mechanism, full tunneling and split tunneling, both of which are supported for connection between CAD-BE and CAD services.

VPN Full Tunneling

VPN full tunneling virtually replaces the network connection with the local area network defined by the VPN. If VPN full tunneling is used to connect to CAD servers, the VPN connection must be established before starting CAD-BE.

VPN Split Tunneling

VPN split tunneling allows you to access a public network and a local area network simultaneously, using the same physical network connection.

There are two types of VPN split tunneling scenarios.

■ Scenario 1: The CAD servers are on the public network and a third-party application is used through the VPN. In this scenario, you must launch and log into CAD-BE before establishing the VPN connection.

■ Scenario 2: The CAD servers are on the VPN and a third-party application is used through the public network. In this scenario, you must establish the VPN connection before launching CAD-BE.

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

Logging Out

You can log out from any agent state.

To log out:

1. Click Logout on the toolbar. If your system is configured to require reason codes, the reason code menu appears. Choose the appropriate reason code, then click OK. You are now logged out of the ACD.

2. Exit CAD-BE by clicking Close (the X in the upper right corner of the window).

3. Click Close to close the integrated browser window, if it is open.

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

Handling Calls

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

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

Single-line vs. Multi-line Configurations

If your system is configured for single-line use, then CAD-BE controls and displays only ACD calls. You cannot answer non-ACD calls with CAD-BE; these calls do not appear in the Contact Appearance pane and must be answered using your hard IP phone or IP Communicator.

If your system is configured for multi-line use, then CAD-BE controls and displays calls received on both the ACD and non-ACD extensions. To control any call on the CAD-BE Contact Appearance pane, you need to select the call from the Contact Appearance pane, and then perform the desired activity.

For both single-line and multi-line configurations, 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.

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 monitor my call"). It appears in a Chat Session window that pops up on your supervisor's desktop. This message is one-way only. Your supervisor cannot send a chat message back to you.

Using Recording

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

> NOTE: The default icons for customizable task buttons are green circles with numbers inside them, like this: 1. Using them on the CAD-BE toolbar is optional. Your administrator can choose to use other icons for the buttons assigned to the recording functions.

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

Figure 4. Recording a call

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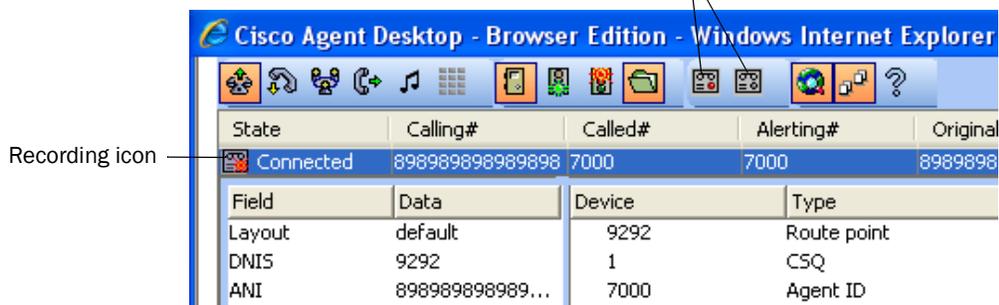
Recording icon

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.

Supervisor Involvement

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

- By intervening in the customer call

- By changing your agent state

- By pushing web pages for you to view in your integrated browser

Call Involvement

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

- Monitor your calls

- Record your calls for review later

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

Agent State Involvement

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

Browser Involvement

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

Agent States

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

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

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

Table 6 lists the available agent states.

Table 6.   Agent states

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

Using the Integrated Browser

The integrated browser feature is available in the CAD Premium and Enhanced packages. This feature allows you to view web pages in an associated browser window while working with CAD-BE. The web pages are displayed in a separate, associated browser window that, unlike CAD-BE itself (which is an applet), contains the complete web browser (that is, a full instance of Internet Explorer or Firefox).

You can click Show/Hide Integrated Browser on the CAD-BE toolbar to show or hide the browser tools at the bottom of the CAD-BE window. This does not impact the associated browser window.

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

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

Accessing Work Sites

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

Accessing Other Websites

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

To access a website using the Address field:

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

Accessing Your Home Page

You can always return to your home page (set up by your administrator) by clicking Home ( ), or by pressing Alt+Home from CAD-BE. Pressing Home in the browser's toolbar causes the browser to return to its home page, which might differ from the home page configured in CAD-BE.

Supervisor Intervention

Your supervisor can "push" a web page to your browser. See "Agent State Involvement" on page 21 for details.
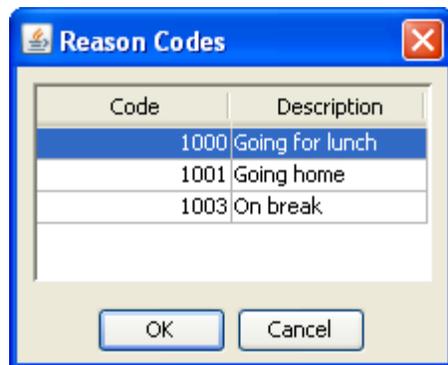
Reason Codes

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

If you are required to use reason codes, whenever you initiate a transition to Not Ready or Logout, a dialog box appears (Figure 5). You must select the appropriate code from that dialog box and click OK or press Enter to complete the transition.

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

Figure 5.   Reason Codes dialog box

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

- Your supervisor initiates the transition. In this case, a reason code that indicates that the supervisor forced the agent state change is automatically selected.

- Your agent state is changed automatically from Ready to Not Ready when an ACD call is routed to your phone but you do not answer it, and it is rerouted to another agent (Reroute on No Answer, or RONA).

Wrap-up Data

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

If you are required to use wrap-up data, whenever your state changes to Work immediately after you end a call, the Select Call Wrap-up dialog box appears (Figure 6). (This occurs when you click the Work button during a call.) You must select the appropriate description from the dialog box and click OK or press Enter to complete the transition.

Figure 6.   Wrap-up data dialog box
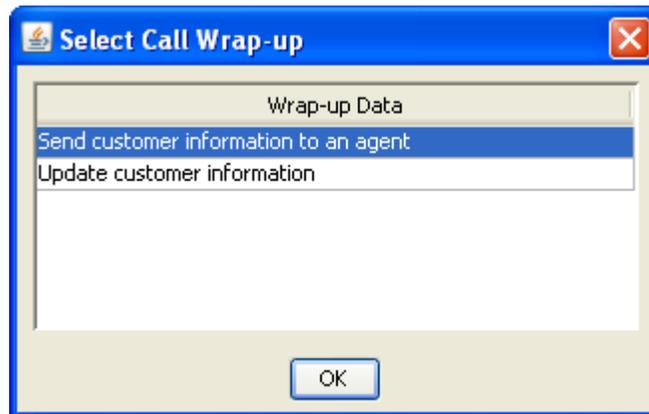
Service Autorecovery

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

CAD-BE primarily communicates with the Cisco Browser and IP Phone Agent (BIPPA) service. The BIPPA service, in turn, communicates with other services.

Loss of BIPPA Service

If you lose your connection to the BIPPA service, CAD-BE continually tries to reconnect. When CAD-BE is successfully reconnected to the BIPPA service, the system prompts you to log in again.

Service Status

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

When CAD-BE detects that it is unable to communicate with a service (generally within three minutes of the service failure), the status bar displays "Partial Service" or "No Service" to indicate some or all of the services have failed. When CAD-BE detects that the service is again available (usually within one minute of service recovery), the status bar displays "In Service" to indicate the services have recovered.

To learn more about what is affected by the service failure, double-click the status message on the status bar. CAD-BE displays a popup box that lists CAD features and indicates if that feature is available or not due to the service outage (Figure 7 on page 27). The server that hosts the service is listed in the Host column. This field can display the host's IP address, host name, or both.

Figure 7.   Server Status popup dialog box

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