Cisco Agent Desktop User Guide

CAD 10.6 for Cisco Unified Contact Center Express Release 10.6

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Cisco Agent Desktop User Guide

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Introduction

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

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

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

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Agent Desktop Feature Levels

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

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

Feature	Enhanced	Premium
Agent-initiated call recording	x	x
Task buttons	x	x
Enterprise data thresholds	x	x
Agent-initiated chat	x	x
Automated recording (part of a work flow)	x	x
Agent work flow HTTP and IPC actions		x
Integrated browser		x
Agent events – time of day		x
Agent E-Mail		x
Wrap-up data	x	x
Reason codes	x	x
Cisco Unified CCX Preview Outbound Dialer		x
Cisco Unified Presence integration	x	x

Cisco IP Communicator

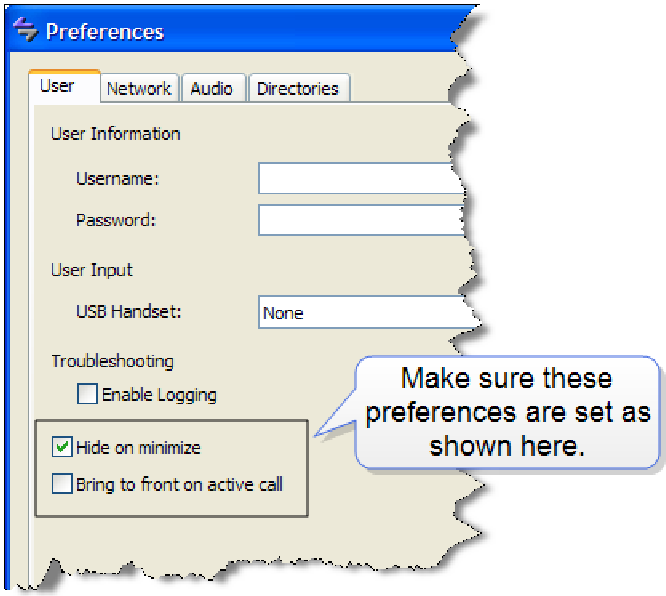
Agent Desktop supports the use of the IP Communicator soft phone. This application is not provided with Agent Desktop and must be purchased and installed separately.

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

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

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

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


Preferences
User
Network
Audio
Directories
User Information
Username:
Password:
User Input
USB Handset:
None
Troubleshooting
☐ Enable Logging
☑ Hide on minimize
☐ Bring to front on active call
Make sure these preferences are set as shown here.

4. Click OK.

Automated Updates

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

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

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

Java Runtime Environment

If your contact center uses the Agent E-Mail feature (available only in the CAD Premium bundle) and you are assigned to an Agent E-Mail CSQ, every time Agent Desktop is launched, it checks to see if the correct version of Java Runtime Environment (JRE) is installed.

If the correct version is not detected, Agent Desktop prompts you to install the correct JRE.

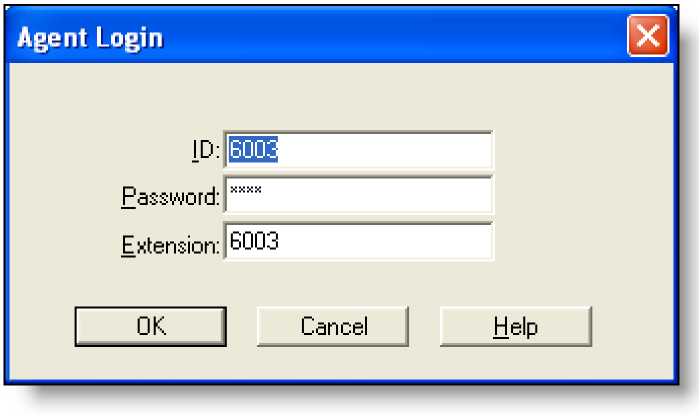
Logging In

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

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

To log into Agent Desktop:

1. Launch Agent Desktop. The Agent Login dialog box appears.



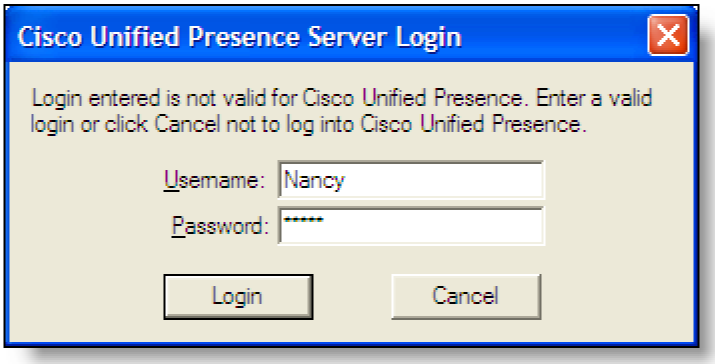
ID: 6003
Password: ****
Extension: 6003

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

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

   > **Note**: If your team assignment is changed while you are logged in, then you must restart Agent Desktop for the change to go into effect.

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



Login entered is not valid for Cisco Unified Presence. Enter a valid login or click Cancel not to log into Cisco Unified Presence.

Username: Nancy

Password: ******

Agent Desktop starts and by default is immediately minimized on the taskbar at the bottom of your Windows desktop. This behavior can be configured differently by your administrator, and, if permitted, by you in the Preferences menu.

Note: Do not attempt to log into Cisco Unified Presence through both Agent Desktop and Cisco

Note: Unified Personal Communicator, even if you use different user IDs to do so. If you do, the client applications can behave unpredictably.

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

Login Notes

- When you attempt to log in, you might see an error message, “A licensing error has occurred. Please see your administrator.” This generally appears when all 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.
- While logging into Agent Desktop with the Agent E-mail feature enabled, you might receive multiple security and certificate warnings. The Information bar displays warning messages such as the hostname does not match the certificate, the

content is blocked due to certificate errors, or the publisher is not trusted. Click the security warning displayed on the Information bar in the browser, and select an appropriate action depending on the available options in the popup menu to unblock the content or trust the publisher.

JRE Issues

You are prompted to install JRE while launching Agent Desktop if you are assigned to an e-mail CSQ and:

- JRE is missing or not available
- The incorrect version of JRE is installed

In the prompting dialog box, do one of the following:

- Click Yes to download the JRE installation file. You must run the installation manually, it will not start automatically. Follow the InstallShield Wizard prompts to complete the installation.
- Click No to continue launching Agent Desktop without the Agent E-Mail feature.

Note: Only a user with administrative privileges can install JRE. If you do not have administrative privileges on your computer and you want to install JRE, contact your supervisor.

Access Through a VPN

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

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. Failure to use VPN software will result in connectivity issues and a loss in functionality such as silent monitoring, recording, and incoming chat message and team message failures.

Cisco AnyConnect Secure Mobility Client is verified to work correctly with Agent Desktop.

VPN solutions from other vendors might result in feature loss. Because they have not been formally verified, they are not supported.

> **Note**: After installing Cisco AnyConnect Secure Mobility Client, you must restart your computer. If you do not restart, monitoring and recording will not work properly.

VPN Tunneling

There are two types of VPN tunneling mechanism, full tunneling and split tunneling, both of which are supported for connection between Agent Desktop 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 Agent Desktop. If the VPN connection is lost during a session, you must close Agent Desktop, reestablish the VPN connection, and then restart Agent Desktop.

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 Agent Desktop before establishing the VPN connection. If the VPN connection is lost during a session, you must restart Agent Desktop and then reestablish 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 Agent Desktop. If the VPN Connection is lost during a session, you must close Agent Desktop, reestablish the VPN connection, and then restart Agent Desktop.

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

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 (Recommended)

In this method, you log out and then close Agent Desktop. This 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 Agent Desktop window) to exit Agent Desktop.

Method 2

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 for more information on forced logins.

To log out using Method 2:

- Click Close (the X in the upper right corner of the Agent Desktop window).

  If your system is configured to require reason codes, before you are logged out the Readon 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 be logged out of Agent Desktop but you will retain the call.
  - If you click No, you will remain logged in and Agent Desktop will remain open.

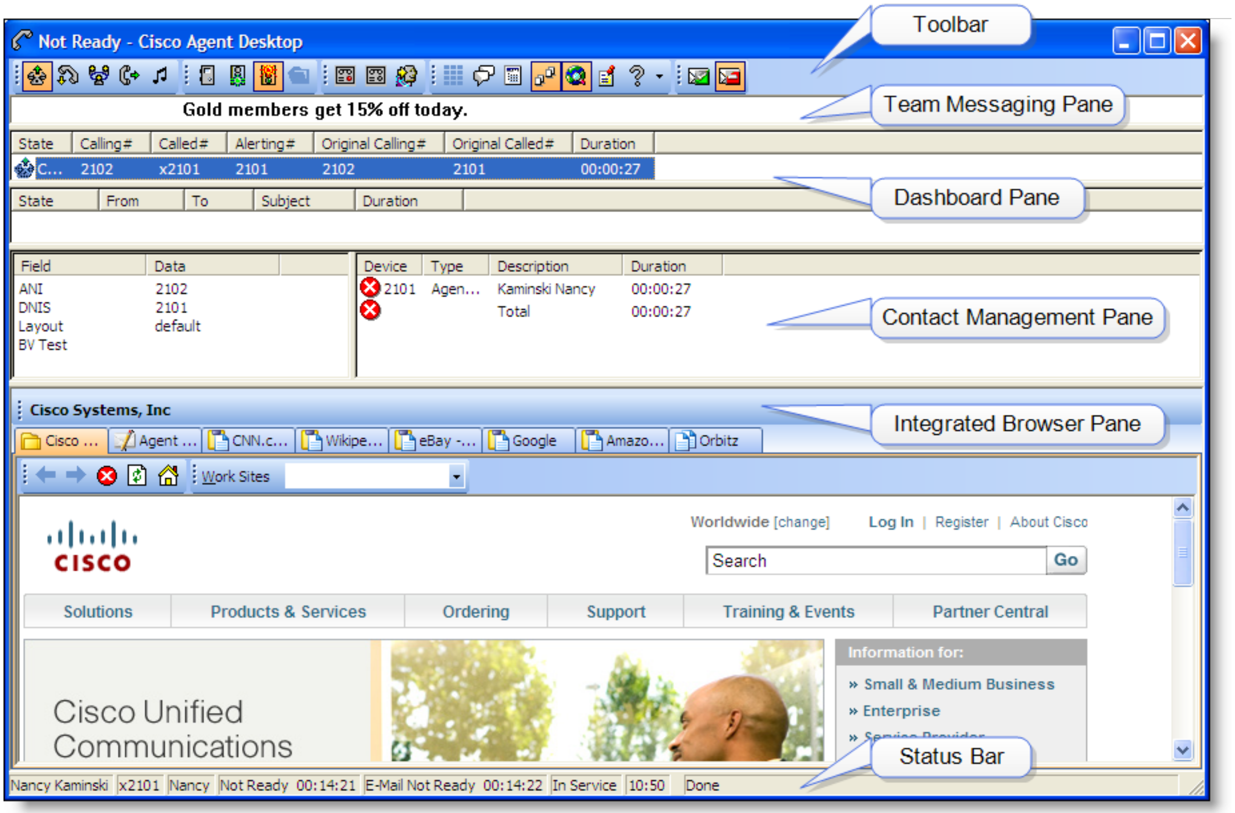
The Agent Desktop Interface

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 Chat instant messaging

The interface includes the following parts:

- Toolbar
- Team messaging pane
- Contact appearance pane
- Contact management pane
- Integrated browser
- Status bar


Not Ready - Cisco Agent Desktop
Toolbar
Team Messaging Pane
Dashboard Pane
Contact Management Pane
Integrated Browser Pane
Status Bar
Cisco Systems, Inc
Cisco ...
Agent ...
CNN.c...
Wikipe...
eBay -...
Google
Amazo...
Orbitz
Work Sites
Worldwide [change]
Log In
Register
About Cisco
Search
Go
Solutions
Products & Services
Ordering
Support
Training & Events
Partner Central
Cisco Unified Communications
Information for:
» Small & Medium Business
» Enterprise
» Service Provider

Gold members get 15% off today.

State	Calling#	Called#	Alerting#	Original Calling#	Original Called#	Duration
C...	2102	x2101	2101	2102	2101	00:00:27

State	From	To	Subject	Duration

Field	Data
ANI	2102
DNIS	2101
Layout	default
BV Test	

Device	Type	Description	Duration
2101	Agen...	Kaminski Nancy	00:00:27
		Total	00:00:27

Nancy Kaminski | x2101 | Nancy | Not Ready 00:14:21 | E-Mail Not Ready 00:14:22 | In Service | 10:50 | Done

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 settings
- Scrolling or non-scrolling team messages
- Shortcut keys and tool tips that are compatible with screen readers
- Toolbar buttons available in small (16 × 16) and large (32 × 32) sizes
- Audible tones that sound when a non-agent-initiated dialog appears (for example, new chat windows and notification about the supervisor barging in, intercepting, recording, or monitoring a call)
- Navigation through each pane, browser, and all the elements of the main window using the Tab key

- The space bar can act as the Enter key for dialog boxes in focus (for example, in the Dial Pad window you can press the space bar to select the focused number and Enter to make the call)
- Support for Job Access With Speech (JAWS) 11 screen reader software

For information about configuring accessibility options, see Desktop Preferences.

Toolbar and Shortcut Keys

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

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

You can control the size of the toolbar buttons. See Desktop Preferences for more information.

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

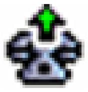
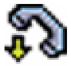
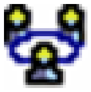
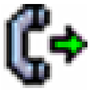
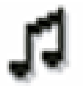
The optional Cisco Unified Outbound Dialer toolbar can be configured to appear in Agent Desktop by your administrator. Depending on the dialing mode of the calling campaign that your administrator sets up, the toolbar will contain some or all of the available nine buttons. For a complete description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

- Press Alt+T to select Agent Desktop's main toolbar
- After selecting the toolbar, press Tab, Shift+Tab, or the arrow keys to move through the buttons in the toolbar
- Press Ctrl+Tab or Ctrl+Shift+Tab to navigate to other toolbars

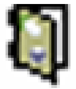
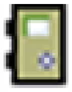
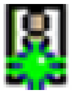
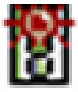
- Press Esc to exit the toolbar
- Press Enter to select the currently focused item

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

Call Handling Buttons

Button	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.

Agent State Buttons

Button	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.

Agent State Buttons (cont'd)

Button	Name	Shortcut	Description
📁	Work	Ctrl+Y	Changes your state to Work, indicating that you will be available to receive ACD calls after you finish wrap-up work.

Window Management Buttons

Button	Name	Shortcut	Description
▦	Make Call	Ctrl+M	Opens a window from which you can dial a call.
1	Task1-10	Alt+<button number>	(Enhanced/Premium only) Task buttons are configured by your administrator to perform various functions, such as running a macro, launching an application, or sending a predefined chat message to your supervisor. There can be up to ten task buttons on the toolbar, and each button can be assigned more than one action. The buttons can be customized, so yours might be different.
💬	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 pane.
🌐	Browser	Alt+B	(Premium only) Shows or hides the Integrated Browser pane.
📝	Preferences	Alt+P	Opens a window for configuring your desktop preferences.

Window Management Buttons (cont'd)

Button	Name	Shortcut	Description
?	Help/About	Alt+H	Opens a menu listing the Help and About options. Use the up and down arrow keys to select an option.
–	Help	F1	Opens the Help window.
–	Service Status	Ctrl+Shift+S	Opens the Service Status window.

Agent E-Mail Buttons

Button	Name	Shortcut	Description
✓	E-Mail Ready	Ctrl+Shift+W	Changes your state to E-Mail Ready, indicating that you are available to process e-mails.
⛔	E-Mail Not Ready	Ctrl+Shift+0	Changes your state to E-Mail Not Ready, indicating that you are not available to process e-mails.

Note: The e-mail state buttons and shortcut keys are available only if the Agent E-Mail option is enabled.

The following table 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.

Shortcut Keys	Description
Ctrl+E	Selects the first entry in the Enterprise Data pane. Press Enter to open the Edit Enterprise Data dialog box for the selected entry.
Ctrl+S	Selects a contact in the Contact Appearance pane.
Ctrl+Shift+L	Selects an e-mail in the Contact Appearance pane.
Ctrl+Shift+E	Selects a row in the Contact Management Call Activity pane.
Ctrl+Shift+M	Reads the team message.
JAWSKEY*+Page Down	Reads the status bar.

Shortcut Keys	Description
JAWSKEY*+T	Reads the title bar.
JAWSKEY*+Ctrl+n	Reads the column header along with its value, where n is the desired column number For example, the call contact appearance pane in Agent Desktop can be announced as “State: Connected, Calling Number: 1114, Called Number 1194.” For such an announcement, you must press JAWSKEY+Ctrl+1 to announce the State column header, JAWSKEY+Ctrl+2 to announce the Calling Number header, and JAWSKEY+Ctrl+3 to announce the Called Number header and their respective values.

* By default, the JAWSKEY is the Insert key. For more information on using JAWS, see the JAWS documentation.

The following table lists the shortcut keys for the Agent Real Time Display window.

Shortcut Keys	Description
Alt+R	Selects the Real Time Displays drop-down list.
Alt+T	Opens the Dates drop-down list. Available only when the Agent Call Log Display is selected.
Alt+C	Selects the first cell in the grid.

The following table lists the shortcut keys for the Dial Pad window.

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

Team Messages

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

The contact appearance pane can display up to seven fields. Two fields, State and Duration, will always be present; the other five fields are configurable by your administrator.

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

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

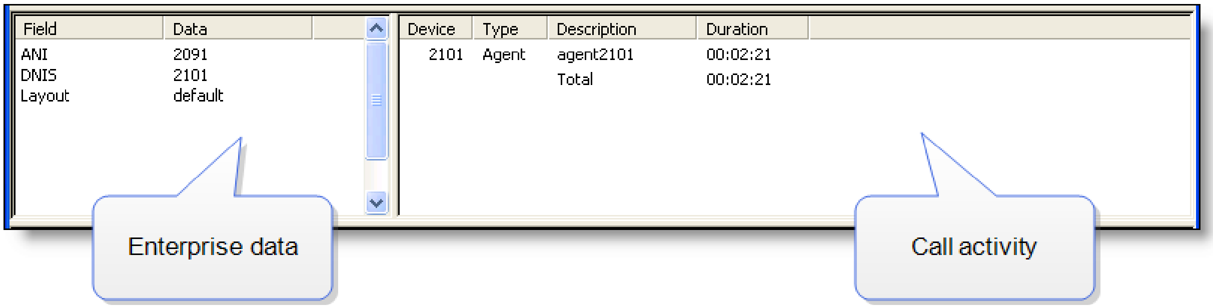
Agent Desktop displays the same information about the call in the call contact appearance pane as the IP phone displays on its screen. Under certain transfer and conference scenarios, there can be some differences between the enterprise data and the contact appearance data because the data sources are different.

The e-mail contact appearance pane can display up to five fields. The available fields are listed in the following table.

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

Contact Management Pane

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



Field	Data
ANI	2091
DNIS	2101
Layout	default

Device	Type	Description	Duration
2101	Agent	agent2101	00:02:21
		Total	00:02:21

You can use the Show/Hide Contact Management button on the dashboard toolbar to show or hide this pane.

Enterprise Data

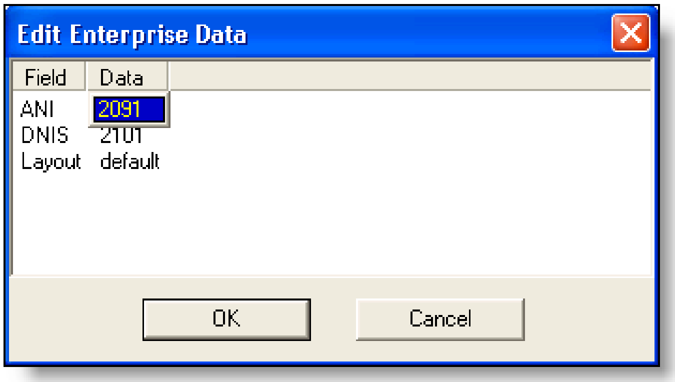
The enterprise data section displays data associated with the selected call. The exact data that is displayed is configured by your administrator.

If you are set up by the administrator to be able to edit data fields, you can modify any of the data fields in the enterprise data window while the call is active. The modified data will follow the call.

Once the call is dropped, the enterprise data can no longer be modified.

To modify a data field:

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



Field	Data
ANI	2091
DNIS	2101
Layout	default

2. Modify the data as desired.
3. Click OK.

Call Activity

The call activity section displays the call activity for the selected call. The following table lists the available fields.

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

Note: In some cases, a call can be on multiple devices simultaneously. For example, if a call is placed in multiple queues or is conferenced to multiple extensions, the call activity section displays the sum of duration of the call on the device and the duration for which the call was in the queue. The total duration is the sum of all durations, some of which might overlap.

Note: If a call is RNA (ring no answer) at one agent and then the call is rerouted to and answered by another agent, the total time shown in the second agent's Call

Activity pane is incorrect. However, in any reports seen by the agent or supervisor, the total call time is correct.

Thresholds

A threshold is the acceptable amount of time a call can remain at a particular device or contact center. Your system administrator 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 displays internet or 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 browser “favorites”) that allow you to navigate to frequently-used websites quickly.

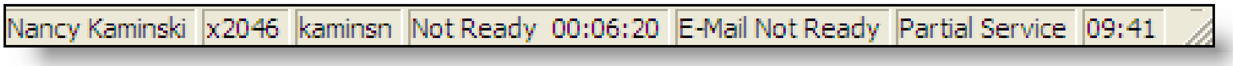
The integrated browser pane includes the following parts:

- Integrated browser toolbar
- Work Sites drop-down list
- Editable Address field (if configured by the administrator)
- Browser
- Up to 10 browser tabs
- Agent E-Mail tab (available only if the e-mail option is enabled)
- Unified CCX Web Chat (appears only if configured by the administrator)

For more information about this pane, see Using the Integrated Browser.

Status Bar

The status bar displays current information about Agent Desktop.



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

From left to right, the status bar displays the following information:

- Agent name
- Agent extension
- Agent ID
- Current agent state and the time spent in that state
- Current e-mail state (visible only if the Agent E-Mail feature is enabled)
- Current status of Agent Desktop features
- Current system time in 24-hour format

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 outage, double-click the status field. A popup window appears that displays the features that are active or inactive.

For more information on the Service Status popup window and service autorecovery, see Service Status.

Desktop Preferences

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

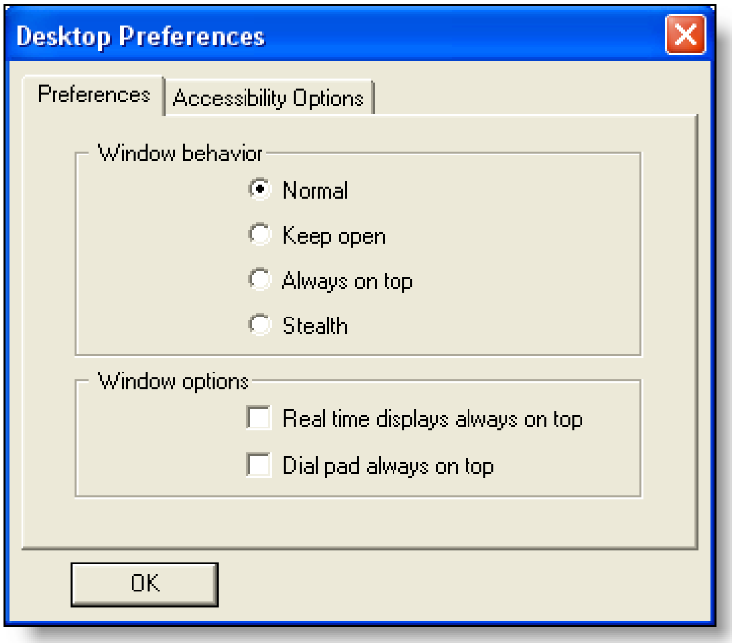
To set your desktop preferences:

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

Window Behavior and Options

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 window behavior and window options modes on the Preferences tab in the Desktop Preferences dialog box.

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



Window behavior

● Normal

○ Keep open

○ Always on top

○ Stealth

Window options

☐ Real time displays always on top

☐ Dial pad always on top

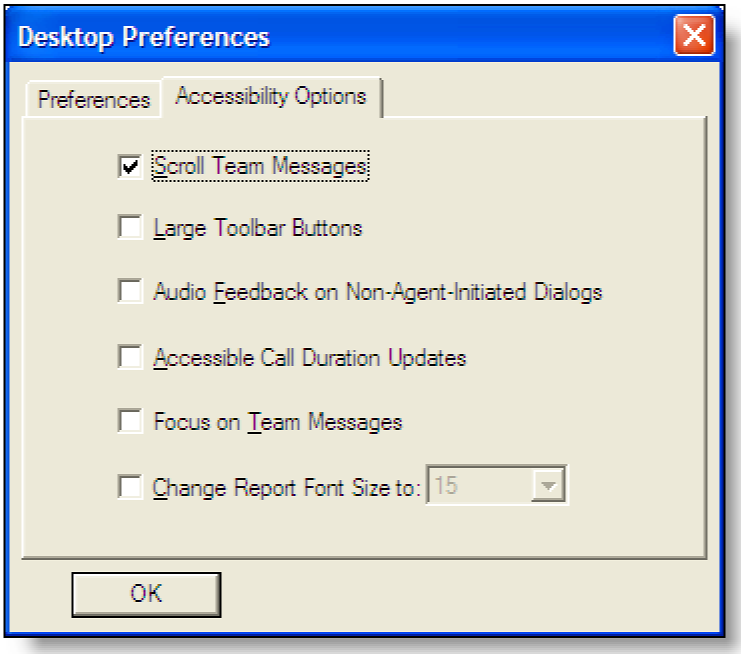
Field	Description
Normal	Default. The window appears when calls are present and minimizes when idle.
Keep open	The window remains open when idle.
Always on top	The window remains open when idle and on top of all other open applications. **Note**: When you select this behavior, you cannot select the Real time displays and Dial pad always on top options. **Note**: IPC actions configured in a work flow will override this window behavior.
Stealth	The window appears as an icon in the system tray (lower right corner of your desktop, next to the system clock) and does not appear unless you double-click ir or if you receive a team message or an e-mail.
Real time displays always on top*	The Agent Real Time Displays window remains open when idle and on top of all other open applications.

Field	Description
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 recently selected window will be on top.

Accessibility Options

The Accessibility Options tab enables you to control how certain aspects of Agent Desktop appear to you.


Desktop Preferences
Preferences
Accessibility Options
☑ Scroll Team Messages
☐ Large Toolbar Buttons
☐ Audio Feedback on Non-Agent-Initiated Dialogs
☐ Accessible Call Duration Updates
☐ Focus on Team Messages
☐ Change Report Font Size to: 15
OK

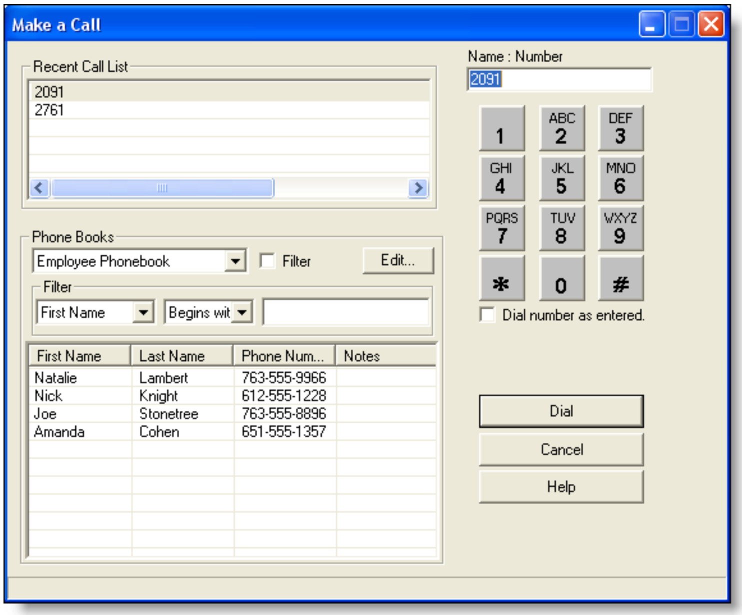
The following table defines the available options.

Option	Description
Scroll Team Messages	If you use a screen reader with Agent Desktop, scrolling team messages (the default mode) can be difficult to read. You can opt to turn off the scrolling feature and have stationary team messages by clearing the Scroll Team Messages check box. Your selected team message behavior will persist from session to session, and does not need to be reset each time you start Agent Desktop.
Large Toolbar Buttons	You can change the size of the buttons on the toolbar from the default 16 × 16 pixels to 32 × 32 pixels by selecting this check box. If all of the large buttons do not fit on one row, they automatically wrap to another row.
Audio Feedback on Non-Agent-Initiated Dialogs	Select this 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 notifications that a supervisor is barging in, intercepting, recording, or monitoring your call.
Accessible Call Duration Updates	Select this check box to prevent screen readers such as JAWS from reading the Duration field in the call contact appearance pane. This ensures that screen readers do not continually read off the duration as it increments.
Focus on Team Messages	Select this check box to enable Agent Desktop to switch focus to the team message pane whenever a team message appears. This allows visually-impaired agents' screen readers to read the incoming team message.
Change Report Font Size To	Select this check box and enter a point size in the field to make the fonts bigger or smaller in the real time displays. You can choose a font size between 15 points and 72 points. The default size is 15 points. **Note**: If you change your font size using the display settings in Windows Control Panel, you must restart Agent Desktop for those changes to take effect.

Dial Pad

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.



Recent Call List
2091
2761

Phone Books: Employee Phonebook ☐ Filter

Filter: First Name | Begins wit

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	

Name : Number: 2091

☐ Dial number as entered.

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 Make a Call, Transfer a Call, or Conference a Call.

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 transfer a call or make a conference call, and the Make a Call dial pad is open, you must close the dial pad first and then click the Transfer or Conference button on the task bar to open the appropriate type of Dial Pad window.

Recent Call List

When you dial a phone number, it is automatically stored in the recent call list. This list stores up to 100 entries. As 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 phone number lists set up by you (your employee phone book) and the system administrator (public phone books).

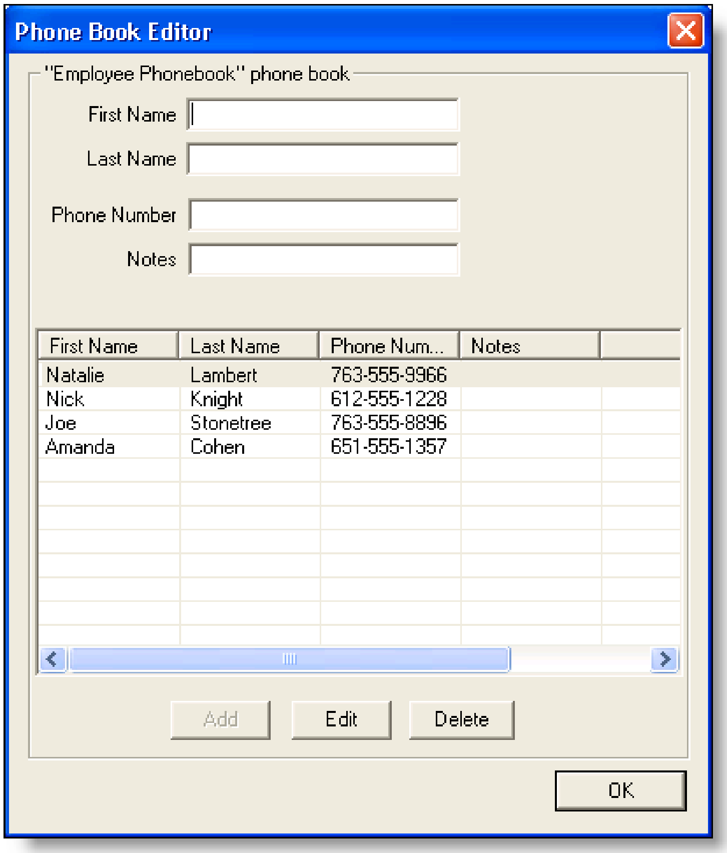
> **Note**: Your administrator can configure Agent Desktop so that one or both types of phone books are not available.

Employee Phone Books

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, and then click Edit. The Phone Book Editor window appears.


Phone Book Editor
"Employee Phonebook" phone book
First Name
Last Name
Phone Number
Notes
Add
Edit
Delete
OK

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

2. Make one of the following edits:

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

     The Phone Number field allows only these characters:

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

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

     Depending on how your administrator has configured the dial plan, Agent Desktop might convert letters to their numeric equivalents on the dial pad. For example, For example, A, B, and C are converted to the number 2.

- To edit an existing entry, select it to display it in the edit fields, click Edit, and then make your changes. You cannot remove the phone number from the entry. If you want to edit more than one entry, you can edit the first entry, and then double-click the next entry to save the changes you made to the first entry and move on to the next entry.
- To delete an entry from the list, select it and then click Delete.

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

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, 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 the 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:

> 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 your administrator has configured the dial plan, Agent Desktop can automatically add the local access and long distance access codes to numbers you enter..

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

When logged in as an agent, you can use Agent Desktop, a hard IP phone, or IP Communicator to handle phone calls.

> **Note**: See your IP phone documentation for explanations of your phone’s functions and features.

The procedures in this section assume you are using the Agent Desktop interface to handle calls.

Single-line vs. Multi-line Configurations

If your system is configured for single-line use, then Agent Desktop controls and displays only ACD calls. You cannot answer non-ACD calls with Agent Desktop; 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 Agent Desktop controls and displays calls received on both the ACD and non-ACD extensions. To control any call on the Agent Desktop contact appearance pane, select the call in the 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. If your system is configured for multi-line use, you can be in any state to receive a non-ACD call.

You can transfer a call from the ACD extension to the non-ACD extension through the phone or the call control buttons in Agent Desktop. However, you cannot transfer a call from the non-ACD extension to the ACD extension using Agent Desktop; the transfer must be initiated through the phone in order to succeed.

If you transfer a call from the ACD extension to the non-ACD extension, you must answer the call on the non-ACD extension using your phone and not the call control buttons in Agent Desktop.

Entering Phone Numbers

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

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

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

```
John Smith: 5551212
```

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 system administrator for information.

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

Answering a Call

Use the Answer/Drop button to answer a call.

To answer a call:

- Click Answer.

To end a call:

- Click Drop.

Making a Call

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

To make a call:

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

Entering Touch Tones

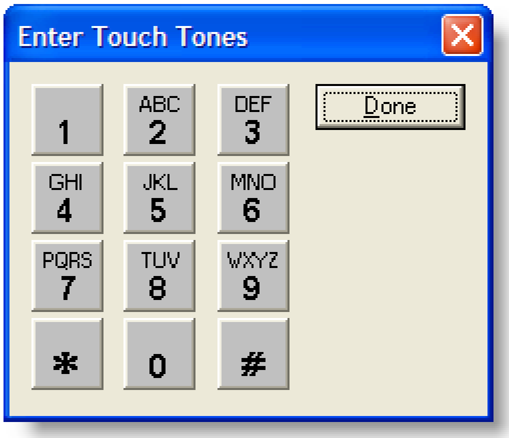
If you need to send touch tones during a call (for instance, if you are prompted to enter an account number) you can do so using the Touch Tones button. This button activates a number pad on which you enter the required numbers.

You can also enter touch tones when transferring or conferencing a call.

During a Call

To enter touch tones during a call:

1. Click Touch Tone when you are prompted to enter numbers during a call. The touch tones number pad appears.



2. Enter the required numbers and/or symbols.
3. Click Done when you are finished. The number pad closes and you are returned to the Agent Desktop interface.

When Transferring or Conferencing a Call

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 when transferring or conferencing a call:

1. During a call, click Transfer or Conference. The Transfer a Call or Conference a Call dialog box appears.
2. Make the consultative call. The person you are calling must answer in order for the Touch Tones check box to become enabled.
3. At the IVR prompt, select the Touch Tones check box, and then enter the required

numbers and/or symbols on the number pad. The appropriate tone is generated immediately after each digit or symbol you enter.

> **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 three types of transfers:

- **Supervised transfer**. This type of transfer is available to every Agent Desktop user, and is triggered by clicking the Transfer button on the toolbar. In this type of transfer, you specify the number to which you want to transfer the active call. You can either hang up before the third party answers, or stay on the line and speak to the third party before actually transferring the call.
- **Blind transfer**. This type of transfer is available only if your administrator has configured a task button with the blind transfer action. In this type of transfer, the active call is transferred directly to a predefined phone number. Once you click the blind transfer task button, the call is transferred to that number and you are no longer connected to the call.
- **Single-step transfer**. This type of transfer is available only if your administrator has configured a task button with the single-step transfer action. In this type of transfer, you specify the number to which you want to transfer the call. Once you do that, the call is transferred directly to the third party and you are disconnected from the call.

> **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. In the Name: Number field, enter the phone number to which you are transferring the call.

3. Click Dial. The active call is put on hold, and when the phone rings, the Dial button changes to the Transfer button.
4. Do one of the following:
    - Click Transfer when the phone starts ringing. The call is transferred and you are disconnected from the call.
    - Wait for the phone to be answered, announce the transfer, and then click Transfer. The call is transferred and you are disconnected from the call.

    If you opt to announce the transfer, you can click Alternate to switch between the two calls. See Alternating Between Calls.

To transfer a call using the blind transfer action:

- With a call active, click the task button assigned to the blind transfer action. The call is transferred to the predefined phone number and you are disconnected from the call.

To transfer a call using the single-step transfer action:

1. With a call active, click the task button assigned to the single-step transfer action. The Transfer a Call dialog box appears.
2. In the Number field, enter the phone number to which you are transferring the call.
3. Click Transfer. The Transferring Call window closes, the call is transferred to the phone number, and you are disconnected from the call.

Conferencing a Call

You can add other parties to an active call to make a conference call. There are three types of conference calls:

- **Supervised conference**. This type of conference is available to every Agent Desktop user, and is triggered by clicking the Conference button on the toolbar. In this type of conference, you specify the number you want to conference in to the active call. You can either add the third party to the call without first speaking to him or her, or speak to the third party before actually completing the conference call.
- **Blind conference**. This type of conference is available only if your administrator has configured a task button with the blind conference action. In this type of conference, a predefined phone number is conferenced directly in to the active call.

- **Single-step conference**. This type of conference is available only if your administrator has configured a task button with the single-step conference action. In this type of conference, you specify the number to be conferenced directly in to the active call.

Note: If you use a blind conference to add someone to your call, the call might be tagged as a conference call.

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

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. In the Name: Number field, enter the phone number of the person you want to add to the call.
3. Click Dial. The party is put on hold, and when the phone rings, the Dial button changes to the Add to Conf button.
4. Take one of the following actions:
    - Click Add to Conf when the phone starts ringing. The third party is added to the conference.
    - Wait for the phone to be answered, then announce the conference. Click Add to Conf to add the person to the conference.

    If you opt to announce the conference, you can click Alternate to switch between the two calls. See Alternating Between Calls.
5. To add one or more people to the conference call, repeat Steps 1 through 4 for each person.

To conference a call using the blind conference action:

- With a call active, click the task button assigned to the blind conference action. The predefined phone number is conferenced directly into your call.

To conference a call using the single-step conference action:

1. With a call active, click the task button assigned to the single-step conference action. The Conference a Call window appears.
2. Enter the phone number you want to conference into the phone call in the Number field and click Add to Conf. The phone number is conferenced directly into your call.

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

Alternating Between Calls

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

Alternating Before Transferring a Call

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

To alternate between calls before transferring:

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

Alternating Before Conferencing a Call

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

To alternate between a conference call and another party:

1. While on a call, click Conference. The Conference a Call window appears.
2. Enter the phone number of the person you want to add to the conference call in the Name: Number field, and then click Dial. When the phone rings, the Dial button changes to the Add to Conf. button. Wait for Party B to answer the phone.
3. Click Alternate to speak to the conference, and then click Alternate again to speak to Party B. You can continue clicking Alternate to switch between the conference call and Party B. When you speak to one party, the other party is on hold.
4. Click Add to Conf. Party B is added to the conference call.

Cisco Unified Outbound Dialer

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

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

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

Unified Outbound Dialer Toolbar and Shortcut Keys

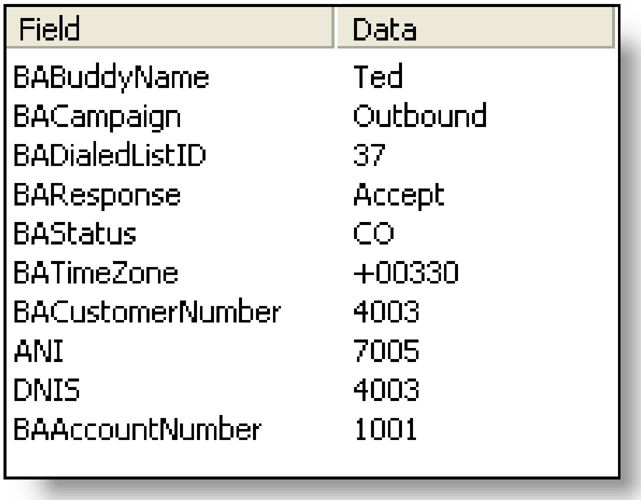
The following table describes the Unified Outbound Dialer toolbar buttons and shortcut keys.

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

Button	Name	Shortcut	Description
	Skip-Next	Alt+Shift+K	The system skips the call and displays a menu of these options: **Wrong Number** (Alt+Shift+W). The agent is informed that the number called is a wrong number. After the call terminates, the system calls other customer phone numbers. **Not Home** (Alt+Shift+N). The agent is informed that the customer is not home. After the call terminates, the system calls other customer phone numbers.
	Callback	Alt+Shift+C	Displays the Callback Properties dialog box, which the agent uses to set a time and date to call back the customer. This action is enabled only if the agent is in the Talking or Wrap-up agent state. The agent also uses this dialog box to cancel a previously-scheduled callback of the current customer. This action works only if the agent is in a Talking or Wrap-up state during a Unified CCX-generated call.

Button	Name	Shortcut	Description
	Reclassify	Alt+Shift+Q	Displays a menu that enables the agent to reclassify a customer phone number as follows: Voice (Alt+Shift+V) Answering machine (Alt+Shift+M) Fax/modem (Alt+Shift+F) Invalid number (Alt+Shift+I) Busy (Alt+Shift+B) Do not call (Alt+Shift+X)
	Cancel Reservation	Alt+Shift+D	The system releases the agent from the calling campaign and places the agent in the Not Ready state. To resume participating in the calling campaign, the agent must change the agent state to Ready.

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



Field	Data
BABuddyName	Ted
BACampaign	Outbound
BADialedListID	37
BAResponse	Accept
BAStatus	CO
BATimeZone	+00330
BACustomerNumber	4003
ANI	7005
DNIS	4003
BAAccountNumber	1001

Reclassifying a Contact

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

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

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

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

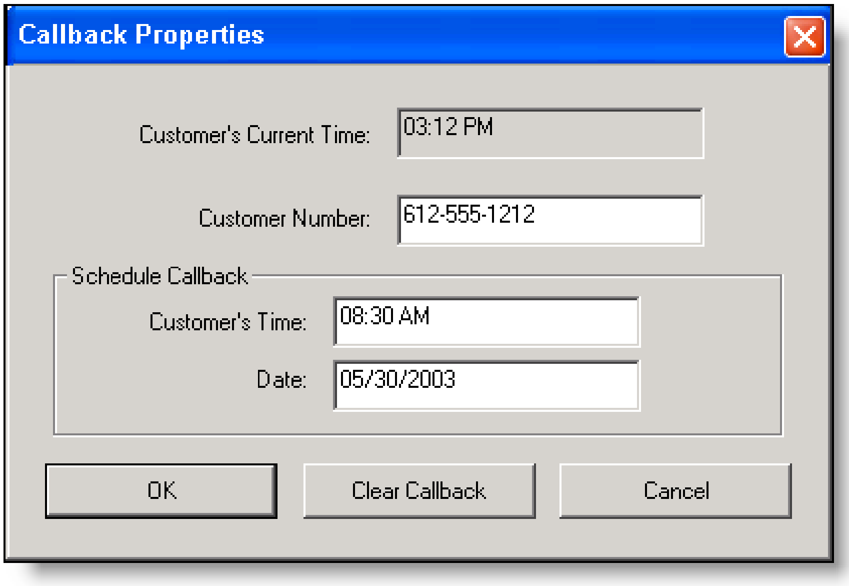
For example, if you reclassify a Voice contact as Answering Machine, and then want to reclassify it again as Invalid, you must first reclassify it as Voice, and only then can you reclassify it as Invalid.

Customer Callbacks

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

To schedule a customer callback:

1. While in Talking or Wrap-up state, click Callback. The Callback Properties dialog box appears, displaying data about the current customer call.



Customer's Current Time: 03:12 PM

Customer Number: 612-555-1212

Customer's Time: 08:30 AM

Date: 05/30/2003

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

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

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

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

> **Note**: The customer callback might not be made exactly at the time you specified if the clock on the Unified CCX server 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 canceled.

Supervisor Intervention

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

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

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 state button while on a call, the Work button appears to be pressed. Your current state is displayed on the status bar.

An exception to this is when you click Logout while on a call—your agent state changes immediately from the Talking state to the Logout state. You will be logged out of Agent Desktop but you will retain the call.

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

Available agent states are listed in the table below.

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.

State	Description
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 ACD call, and are unavailable to receive ACD calls.

Chat

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

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

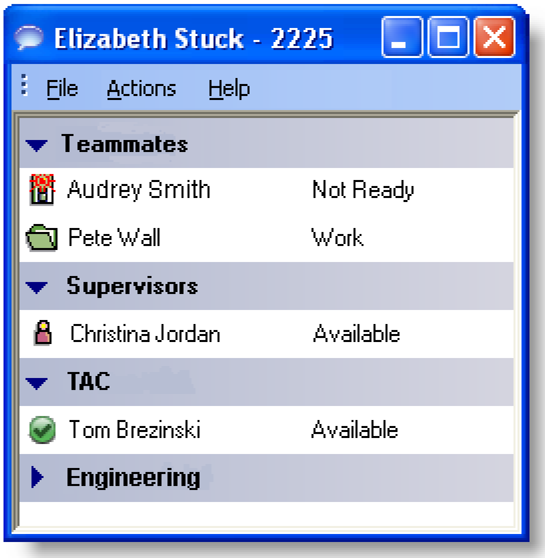
Some Chat features include:

- 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 agent’s or supervisor’s screen so the message will be noticed immediately. This option does not apply to messages sent to SMEs.
- If the priority of a chat message is normal (the default), the Chat window will remain in its current state (open or minimized) and the corresponding icon will flash on your Windows task bar.
- A log of the chat messages sent between you and your chat partner (the chat history) is available as long as the Chat window is open. The chat log is in chronological order, with the oldest message at the top. After you close the Chat window, the log is deleted.
- You can send and receive chat messages even if you are logged out of the ACD, as long as Agent Desktop remains open.

Chat Contacts

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

The example of a Contact Selection window below shows the default Teammates and Supervisors drawers, as well as two customizable drawers, TAC and Engineering.



Teammates	
Audrey Smith	Not Ready
Pete Wall	Work
Supervisors	
Christina Jordan	Available
TAC	
Tom Brezinski	Available
Engineering	

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

  Note: You cannot chat with IP Phone agents.

- The Supervisors drawer lists all supervisors on your team. It appears only if a supervisor is logged in. Their status is always listed as Available. Supervisors must be logged in to be listed here.
- The Conference drawer appears when you are on a conference call with other agents. SMEs, if they are on the conference call, are not listed here.
- The Personal Contacts drawer appears if you have this drawer set up in Cisco Unified Personal Communicator. The contacts in this drawer are administered in Unified Personal Communicator.
- Other drawers list the SMEs associated with the work flow groups to which you

belong. The SMEs' Unified Presence status is indicated both by an icon to the left of the SME name and by text to the right of the SME name. The Unified Presence status is updated whenever an SME status changes.

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

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

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

Chat Shortcut Keys

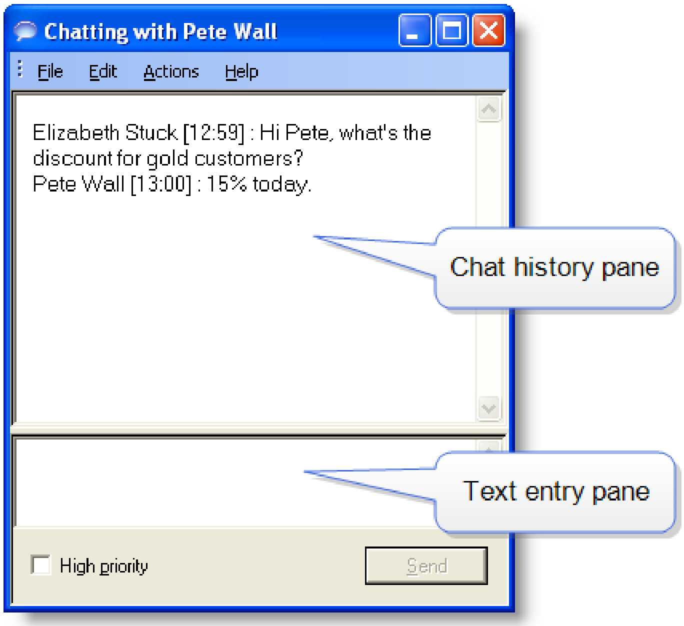
The following table lists the shortcut keys in the Chat window.

Shortcut Key	Description
Alt+L	Starts a chat session with the person highlighted in the Chat Selection window. If you are already chatting with the highlighted person, Alt+L will bring that chat window to the foreground.
Alt+C	Opens the dial pad so you can call the person highlighted in the Chat Selection window. The Name: Number field is auto-populated with the selected person's extension.
Ctrl+Shift+H	Selects the chat log pane.
Ctrl+E	Pastes Enterprise data of the current call into the text entry pane.

Sending a Chat Message

To send a chat message:

1. Click Chat on the toolbar to open the Chat Selection window.
2. Double-click the name of the person you want to chat with. A chat window opens and a chat session begins with the person you selected.



Elizabeth Stuck [12:59] : Hi Pete, what's the discount for gold customers?
Pete Wall [13:00] : 15% today.

Chat history pane

Text entry pane

3. Type your message in the text entry pane and click Send or press Enter. Your message is sent to your chat partner and logged in the chat history pane.

> **Note**: If you want your message to be noticed immediately by popping on your chat partner’s desktop, select the High priority check box.

> **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.

To end a chat session:

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

Sending Enterprise Data

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

To send enterprise data:

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

Predefined High Priority Chat Messages

You might have a task button configured to send a high priority chat message to your supervisor. The text of this chat message is predefined and set up by your administrator. An example of such a message is “Please monitor my call.” It appears in a Chat window that pops up on your supervisor’s desktop.

These predefined messages behave just like a chat message you send that is tagged as a high priority message.

Calling Someone in the Chat List

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

- To call someone, you must be logged into Agent Desktop and be in an agent state that allows you to make a call.
- You cannot call someone listed in your Personal Contacts drawer.
- You do not have to be chatting with an agent or SME in order to call them.

The call control menu items are typically disabled for SMEs. In order to make a call, transfer a call, or conference a call to an SME in your chat list, the SME must be configured as an External Contact by your administrator. If an SME name does not have a phone number associated with it, the call control menu items are disabled.

To call someone in your chat list:

1. In the Chat Selection window, do one of the following:
    - If you are chatting with the person you want to call, choose Actions > Call, Transfer, or Conference.
    - If you are not chatting with the person you want to call, select the person’s name and choose Actions > Call, Transfer, or Conference. You can also right-

click the person’s name and choose the desired call action from the resulting popup menu.

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

2. Click Dial.

Using Unified CCX Web Chat

If configured by your administrator, Agent Desktop will display Unified CCX Web Chat in the first tab in the integrated browser. Unified CCX Web Chat enables you to chat with customers if you are assigned to one or more chat CSQs.

For more information on how to use Unified CCX Web Chat, see the *Cisco Unified CCX Web Chat Agent and Supervisor Desktop User Guide* available at:

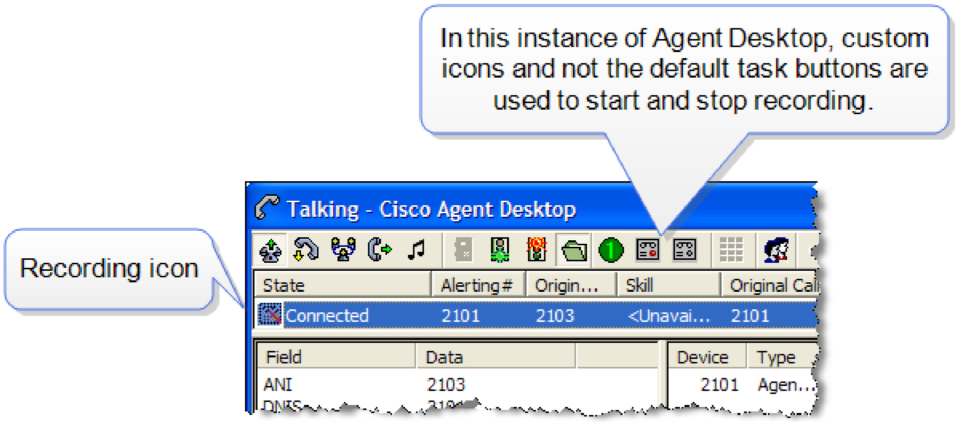
> http://www.cisco.com/en/US/products/sw/custcosw/ps1846/tsd_products_support_series_home.html

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 button starts recording and the other button stops recording.

The default icons for customizable task buttons are green circles with numbers inside them. Using them on the Agent Desktop toolbar is optional. Your administrator can choose to use other icons for the buttons assigned to 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.



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

Recording icon

State	Alerting#	Origin...	Skill	Original Call
Connected	2101	2103	<Unavai...	2101

Field	Data
ANI	2103

Device	Type
2101	Agen...

When recording a call, keep in mind the following:

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

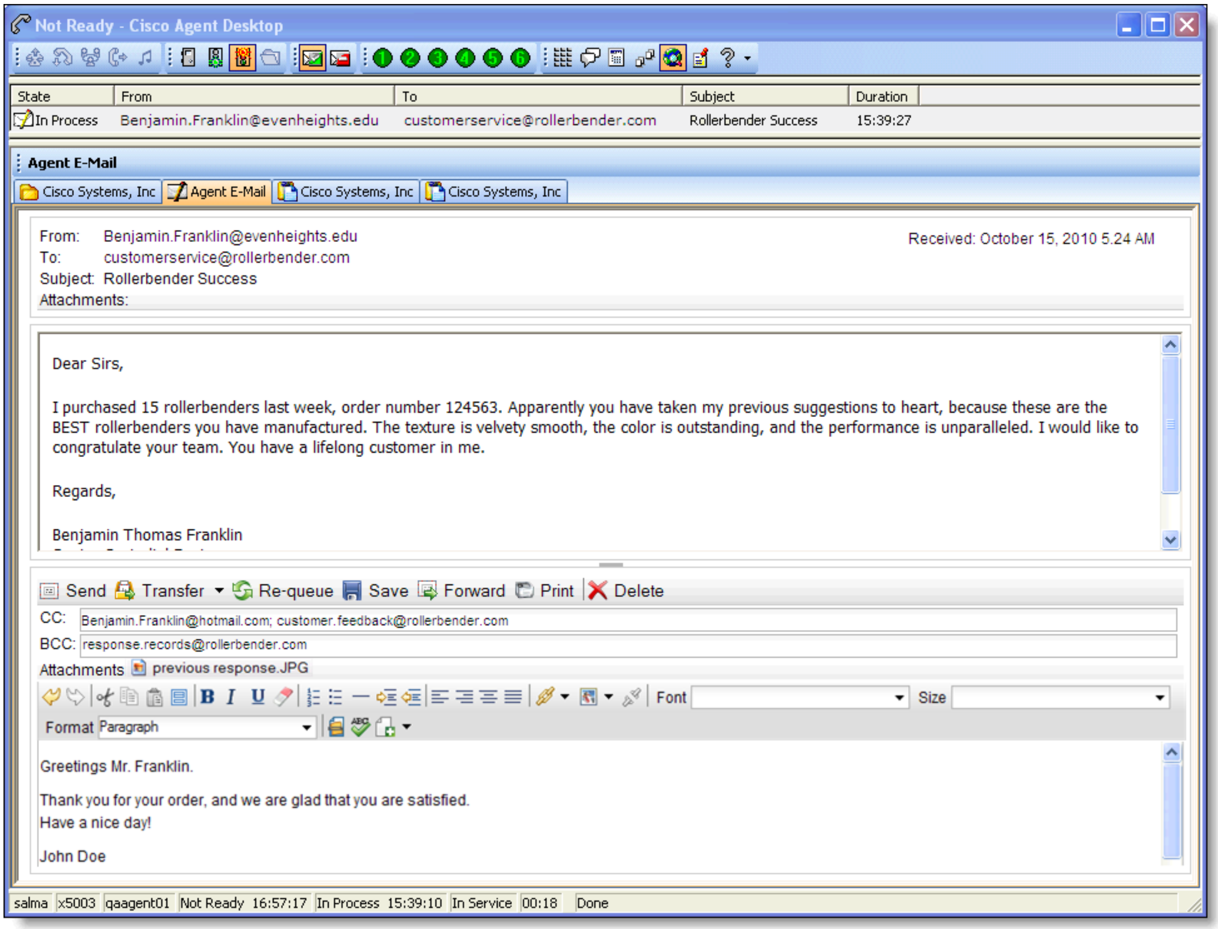
- Recording in a multi-line environment depends on your configuration. You might not be able to record non-ACD calls.

Agent E-Mail

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

If you are assigned to one or more e-mail CSQs in addition to voice CSQs, Agent Desktop will display an Agent E-Mail tab in the integrated browser pane and several e-mail state buttons on the toolbar.

When you click the E-Mail Ready button, your e-mail state changes to E-Mail Ready and the next available e-mail in your e-mail CSQs appears in your Contact Appearance pane.



State	From	To	Subject	Duration
In Process	Benjamin.Franklin@evenheights.edu	customerservice@rollerbender.com	Rollerbender Success	15:39:27

From: Benjamin.Franklin@evenheights.edu
To: customerservice@rollerbender.com
Subject: Rollerbender Success
Attachments:
Received: October 15, 2010 5.24 AM

Dear Sirs,

I purchased 15 rollerbenders last week, order number 124563. Apparently you have taken my previous suggestions to heart, because these are the BEST rollerbenders you have manufactured. The texture is velvety smooth, the color is outstanding, and the performance is unparalleled. I would like to congratulate your team. You have a lifelong customer in me.

Regards,

Benjamin Thomas Franklin

CC: Benjamin.Franklin@hotmail.com; customer.feedback@rollerbender.com
BCC: response.records@rollerbender.com
Attachments previous response.JPG
Format Paragraph

Greetings Mr. Franklin.

Thank you for your order, and we are glad that you are satisfied.
Have a nice day!

John Doe

salma | x5003 | qaagent01 | Not Ready 16:57:17 | In Process 15:39:10 | In Service 00:18 | Done

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

You can work on one e-mail at a time. You can have up to five e-mails in your contact appearance pane (for example, four saved as drafts and one in process). The exact number allowed depends on how your administrator has configured Agent E-Mail. For example, if the maximum number of e-mails allowed in your contact appearance window is three, you can have two e-mails saved as drafts and one e-mail in process. The e-mails are delivered one at a time only after the previous e-mail is sent or saved as draft.

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

> **Note**: The Click to dial action is not available for phone numbers included in a customer e-mail.

> **Note**: If the e-mail content (excluding attachments) is over 512 KB in size, you will see an error message that the e-mail might not be able to be displayed in Agent Desktop. If you opt to not try to display the e-mail, or if you try to display it and it fails, the e-mail will still be listed in your contact appearance pane, and you will be able to forward, re-queue, transfer, send, save, or delete it.

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

You can carbon copy (CC) or blind carbon copy (BCC) an external e-mail address by manually entering the e-mail address in the respective fields. This is in addition to any automatic BCCs configured for the CSQ.

You might receive e-mails that contain a reply-to e-mail address that is different from the e-mail address from which it was sent. In this case, you will see both Reply-To and From fields. If configured by your administrator, your response is sent to the reply-to e-mail address. You cannot change where your response is sent.

> **Note**: Agent E-Mail cannot verify if an e-mail address is valid, and it will not notify you if an e-mail cannot be delivered because the address is wrong. Make sure you type external e-mail addresses correctly to ensure the e-mail reaches all recipients.

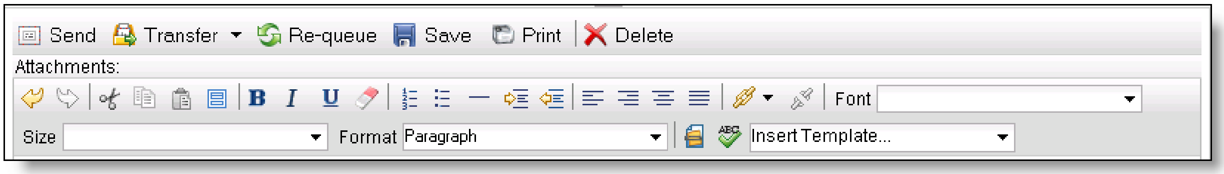
E-Mail States

The e-mail states are similar to agent states. The available e-mail states are listed in the following table.

State	Description
E-Mail Ready	You are available to receive e-mails.
E-Mail Not Ready	You are not available to receive e-mails.
In Process	You have received an e-mail and are currently working with it. You can process e-mail while in either the E-Mail Ready or E-Mail Not Ready states.

Toolbar and Shortcut Keys

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



The e-mail toolbar functions are described in the following table.

Button	Name	Shortcut	Description
	Send	Ctrl+Enter	Sends your reply to the customer.
	Transfer	Ctrl+Shift+R	Displays a drop-down list of available CSQs (including the CSQ the e-mail was originally delivered to) to which you can transfer the e-mail. When you transfer an e-mail, any messages you wrote in reply that are in draft state are saved automatically with the original e-mail.
	Re-queue	Ctrl+R	Returns the current e-mail to the CSQ so it can be worked on by another agent. When you re-queue an e-mail, any messages you wrote in reply that are in draft state are saved automatically with the original e-mail.

Button	Name	Shortcut	Description
💾	Save	Alt+S	Saves the e-mail you are working on as a draft. E-mail you save remains in your contact appearance pane until you send, re-queue, transfer, or delete it.
➦	Forward	Ctrl+Shift+S	Forwards the e-mail to an external account. This option appears only if your administrator has enabled it for the e-mail CSQ. Forwarding an e-mail allows you to compose a note or a comment to the forwarded recipient(s). The e-mail will still be assigned to you for resolution.
🖨	Print	Ctrl+P	Displays the inbound customer e-mail and the outbound (or draft) reply e-mail in a new tab or a new window, depending on the administrator's settings, along with the system Print dialog box. You must close the window or tab manually after you print the e-mail.
✗	Delete	Alt+Backspace	Deletes the current e-mail. Depending on how CAD is configured, the e-mail might actually be deleted, or it might be forwarded to an e-mail address set up by the administrator so that a supervisor can decide if the e-mail should really be deleted or sent back into a CSQ.
–	CC	–	Allows you to enter one or more external e-mail addresses to copy them on your response. Separate multiple e-mail addresses with a semicolon. This option appears only if your administrator has enabled it for the e-mail CSQ.

Button	Name	Shortcut	Description
–	BCC	–	Allows you to enter one or more external e-mail addresses to copy them on your response, while hiding the recipients' e-mail addresses. This is in addition to any automatic BCCs configured for the CSQ by your administrator. Separate multiple e-mail addresses with a semicolon. This option appears only if your administrator has enabled it for the e-mail CSQ.
–	Attachment	–	Lists the files that you have attached to your response using the Attach File option.
↩	Undo	Ctrl+Shift+Z	Undoes the last action. Clicking the button again or repeating the keystrokes continues to undo the actions in order, starting with the most recent action.
↪	Redo	Ctrl+Shift+Y	Redoes the last action. Clicking the button again or repeating the keystrokes continues to redo the actions in order, starting with the most recent action.
✂	Cut	Ctrl+X	Removes the selected content and puts it on the clipboard.
⎘	Copy	Ctrl+C	Copies the selected content to the clipboard.
📋	Paste	Ctrl+V	Pastes the content from the clipboard.
▤	Select All	Ctrl+Shift+A	Selects all content.
B	Bold	Ctrl+B	Changes the selected text to bold.
I	Italics	Ctrl+I	Changes the selected text to italics.
U	Underline	Ctrl+U	Underlines the selected text.
⌫	Remove Format	–	Removes any format applied to the selected text.

Button	Name	Shortcut	Description
	Numbered List	–	Inserts a numbered list.
	Bulleted List	Ctrl+\	Inserts a bulleted list.
	Horizontal Rule	–	Inserts a horizontal rule at the cursor position.
	Increase Indent	–	Increases the space between the left margin and the content.
	Decrease Indent	–	Decreases the space between the left margin and the content.
	Align Left	–	Aligns the left edge of the content to the left margin.
	Align Right	–	Aligns the right edge of the content to the right margin.
	Align Center	–	Aligns the content to the center of the page.
	Justify	–	Aligns the left and right edges of the content evenly across the width of the page.
	Create Link	–	Creates a hyperlink of the selected text to the specified URL. You must include the full address for the hyperlink to work properly. For example, http://www.cisco.com.
	Remove Link	–	Removes the hyperlink from the selected text. This option is enabled only when the hyperlinked text is selected.
–	Font	–	Allows you to change the font of the selected text.
–	Size	–	Allows you to change the font size of the selected text.

Button	Name	Shortcut	Description
–	Format	Ctrl+1, Ctrl+2, Ctrl+3, Ctrl+4	Allows you to apply a format to the selected text. Options are: Ctrl+1: Heading Ctrl+2: Subheading Ctrl+3: Sub-subheading Ctrl+4: Paragraph
📎	Attach File	Ctrl+Shift+H	Allows you to attach a file to your response.
ABC✓	Spell Check	F7	Checks the spelling in your response.
–	Insert Template	Ctrl+Shift+P	Allows you to select a predefined template to insert into the response at the point where the cursor is placed.

E-Mail Format

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

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

Answering E-Mail

To answer an e-mail, follows these steps.

To answer an e-mail:

1. Click E-Mail Ready. Your e-mail state changes to E-Mail Ready and the next available e-mail is sent to your contact appearance pane.
2. Click the e-mail. The text of the e-mail is displayed in the upper portion of the Agent E-Mail tab in the browser pane.

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

3. To include other recipients in your reply, type their e-mail addresses in the CC and/or BCC fields.

   Note: Any address entered in the CC field is visible to all e-mail recipients, while addresses entered in the BCC field are not visible to any e-mail recipients.

4. In the Response section of the Agent E-Mail tab, type your response to the e-mail.
   - Click Attach File to navigate to a file location and select a file to attach to your reply. The file attachment can be of any format. By default, the maximum attachment file size is 10 MB total, and the maximum per individual attachment is 6 MB. This limit can be configured by your administrator, so the limit in your contact center might be different.
   - Click Insert Template to display a drop-down list of available templates set up by your administrator that you can insert in your reply. The template is inserted where your cursor is positioned. You can insert multiple templates.
   - Click Check Spelling to run a spell check on your reply. Spell check is not supported for Finnish, Canadian French, Polish, Swedish, Turkish, Traditional and Simplified Chinese, Japanese, and Korean.

   Note: Do not right-click in the Response pane. Selecting any option in the resulting menu can result in the loss of all text in your response.

5. When your reply is complete, click Send. Your reply is sent to the customer.

To insert a hyperlink in your e-mail response:

1. In the Response section of the Agent E-Mail tab, select the text in your e-mail response you want to turn into a hyperlink, or position your cursor where you want the hyperlink to appear.
2. Click Create Link to open the Link Properties dialog box.
3. Complete the fields as described in the following table, and then click Set.

Field	Description
URL	Enter the address of the content to which you are linking. You must include the full address for the hyperlink to work properly. For example, http://www.cisco.com.
Description	Enter a description of the hyperlink that appears in your e-mail response as a link.
Target	Do not change the Target setting. If you do, the Link Properties dialog box will close, and you will have to start the process over again.

Reviewing E-Mail

The E-Mail Review CSQ is used to review agent responses to customer e-mails. Agents who are assigned to the E-Mail Review CSQ review each e-mail before it is sent to the customer. Reviewers can edit, transfer, re-queue, and send reviewed e-mail using Agent E-Mail functionality.

Only e-mail answered by agents whose work flow group and e-mail CSQ are configured for review is sent to the E-Mail Review CSQ. E-mail cannot be transferred manually to the E-Mail Review CSQ.

To review an e-mail:

1. Click E-Mail Ready. Your e-mail state changes to E-Mail Ready and the next available e-mail to be reviewed is sent to your contact appearance pane.
2. Click the e-mail. The customer’s e-mail, with the agent response and any attachments are displayed in the upper portion of the Agent E-Mail tab in the browser pane.
3. Review the e-mail and edit it as necessary. You can do any of the following actions:
    - Transfer the e-mail to any CSQ to be handled by another agent. You cannot transfer an e-mail to a Review CSQ.
    - Re-queue the e-mail to the E-Mail Review CSQ to be reviewed by another reviewer.
    - Send the e-mail to the customer. The sent e-mail shows the e-mail address of the original CSQ to which it was queued, not the e-mail address of the E-Mail Review CSQ.

If you have edited the e-mail, any edits you made are preserved when the e-mail is transferred or re-queued, and the e-mail is saved as a draft.

Managing E-Mails and Calls

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

Note: If you receive a call while the Select E-mail Wrap-up dialog box is open after sending an e-mail reply, all the call control buttons are disabled. To answer the call through the Agent Desktop interface, you must select a wrap-up code to close the dialog box.

If configured by the administrator, when an ACD call is finished, the system automatically returns you to your previous e-mail state and you can continue writing your response.

Note: Your administrator can configure the e-mail CSQ so that you automatically return to the e-mail state (processing or ready) you were in before you answered a call so you can resume working on e-mail.

Note: If you manually change the e-mail state while in the middle of a call you will remain in that e-mail state upon completion of the call.

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

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

Icon	Description
✉	In Process. The e-mail is currently being worked on.

Icon	Description
✉	Draft. Work on the e-mail has started but was interrupted for some reason, and so was saved as a draft.

E-Mail Re-queue on Logout

Your administrator has the option of configuring Agent E-Mail so that, when you log out, any e-mail that is assigned to you is re-queued to be handled by another agent. In this case, any messages written by you are saved automatically with the original e-mail.

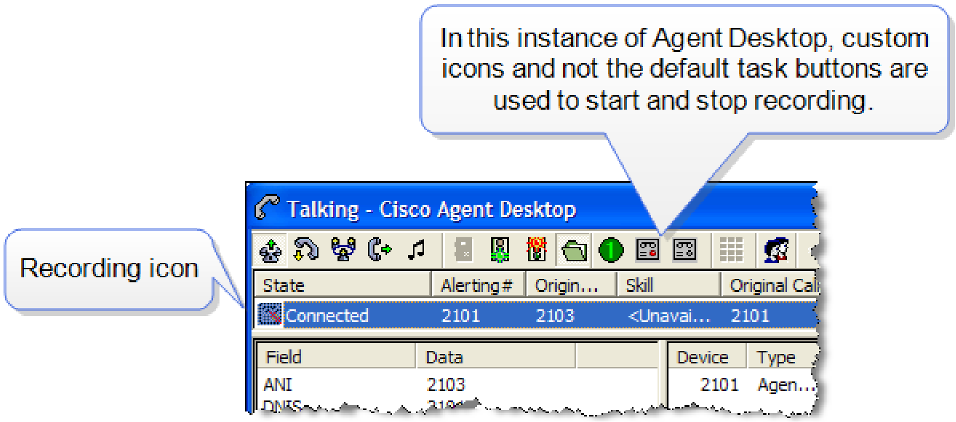
If the re-queue on logout option is not enabled, e-mail you save as a draft remains assigned to you when you log out. It will appear in the contact appearance pane when you log back in. If an e-mail is urgent and requires immediate handling, but you must log out, it is recommended that you re-queue the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

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 button starts recording and the other button stops recording.

The default icons for customizable task buttons are green circles with numbers inside them. Using them on the Agent Desktop toolbar is optional. Your administrator can choose to use other icons for the buttons assigned to 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.



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

Recording icon

Talking - Cisco Agent Desktop

State	Alerting#	Origin...	Skill	Original Cal
Connected	2101	2103	<Unavai...	2101

Field	Data
ANI	2103

Device	Type
2101	Agen...

When recording a call, keep in mind the following:

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

- Recording in a multi-line environment depends on your configuration. You might not be able to record non-ACD calls.

Agent Real Time Displays

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

- Agent ACD State Log Display
- Agent Call Log Display
- Agent E-Mail Detail Display
- Agent E-Mail Log Display
- Agent Statistics Display
- Contact Service Queue Statistics Display

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

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

To view agent real time displays:

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 display appears.
3. Click Refresh (if enabled) to update the information.

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

The display fields are described in the following table.

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

Agent Call Log Display

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

Calls displayed for a particular day are received after midnight in the Unified CCX server’s time zone. In a multi-line environment, both ACD and non-ACD calls are listed.

The display fields are described in the following table.

Field	Description
Start Time	Time the call started. Start time is based on the time the Unified CCX system receives the state data from Agent Desktop, so that the start time reflects the Unified CCX server time, not the time shown on your PC. Note that if the Unified CCX 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 = dial tone + ringback + talk time + hold time

Agent E-Mail Detail Display

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

The display fields are described in the following table.

Field	Description
E-Mails Retrieved	The number of e-mails the agent has retrieved since midnight. The retrieval might be the result of agent action or the outcome of a work flow.
E-Mails Transferred	The number of e-mails the agent has transferred since midnight.
E-Mails Requeued	The number of e-mails the agent has re-queued since midnight.
E-Mails Sent	The number of e-mails the agent has sent since midnight.
E-Mails Deleted	The number of e-mails the agent has deleted since midnight.

Field	Description
Total In-Process Time Sent E-Mails	The total time in process for e-mails that the agent has sent. All in-process time is included for the e-mails, regardless of whether the in-process time occurred during the current day or not.
Average In-Process Time Sent E-Mails	The average in-process time across all e-mails that the agent has sent. In determining the average, all in-process time for each e-mail is averaged, regardless of whether the in-process time occurred during the current day or not.
Maximum In-Pocess Time Sent E-Mails	The longest in-process time across all e-mails that the agent has sent. In determining the longest, all in-process time is included for each e-mail, regardless of whether the in-process time occurred during the current day or not.

Agent E-Mail Log Display

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

The display fields are described in the following table.

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

Agent Statistics Display

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

The display fields are described in the following table.

Field	Description
Calls Presented	Number of inbound calls (ACD or non-ACD) that are delivered to your extension (causes your phone to ring). This can be verified by counting the number of entries whose call direction displays “Inbound” in the Agent Call Log for the current day.
Calls Handled	Number of inbound calls (ACD or non-ACD) that are answered at your extension. This can be verified by counting the number of entries whose Call Answered column displays “Yes” in the Agent Call Log for inbound calls only for the current day.
Avg Talking	The total time on calls (all talk time + all hold time) divided by the number of calls.
Max Talking	The length of the longest call (talk time + hold time)
Total Talking	The total time on calls (all talk time + all hold time)
Avg Ready	The total time spent in the Ready state divided by the number of times spent in the Ready state.
Max Ready	The longest time spent in the Ready state.
Total Ready	The total time spent in the 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.
Max Not Ready	The longest time spent in the Not Ready state.
Total Not Ready	The total time spent in the Not Ready state.
Avg After Call Work	The total time spent in the Work state divided by the number of times spent in the Work state.
Max After Call Work	The longest time spent in the Work state.
Total After Call Work	The total time spent in the Work state.

Contact Service Queue Statistics Display

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

The display fields are described in the following table.

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

Integrated Browser

The integrated browser feature is available in the CAD Premium package. The integrated browser allows you to view intranet and internet web pages from within Agent Desktop. Its behavior and features are configured by your administrator. These configured features include the following:

- Popup windows can be displayed as a new tab or as a regular Internet Explorer popup window.
- The integrated browser can support up to 10 tabs. The first tab is reserved for web pages your supervisor pushes to you in order to assist you in helping customers.
- Your administrator can configure specific web pages to display in each browser tab. If the administrator does not do this, the tab is blank.
- 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 set up to do so 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.

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

> **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. However, the integrated browser is *not* a version of Internet Explorer. While the integrated browser and Internet Explorer share the underlying

operating system’s browser engine, there are many features that are part of Internet Explorer that are not available to the integrated browser.

Integrated Browser Notes

- You must have a supported version of Internet Explorer on your PC for the integrated browser to function.
- The Internet Explorer tabbed browsing feature is not available in the integrated browser.
- 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.
- Reordering integrated browser tabs by dragging is not supported.
- Web pages displayed in the integrated browser that take a long time to load completely can have an affect on Agent Desktop performance, for example, slowing the scrolling of team messages.

Toolbar Buttons and Shortcut Keys

The integrated browser toolbar contains basic browser buttons that allow you to navigate among the web pages you view, refresh a current page, and return to your home page.

The integrated browser toolbar buttons and shortcut keys are listed in the following table.

Button	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.

Button	Name	Shortcut	Description
⟳	Refresh	F5	Refreshes the current web page.
⌂	Home	Alt+Home	Returns you to your predefined home page.
–	New Tab	Ctrl+Shift+T	Opens a new tab.
–	New Window	Ctrl+N	Opens a new window (if enabled by your administrator) or opens a new tab.
–	Next Tab	Ctrl+Shift+Tab	Takes you to the next tab.
–	Address	Alt+D	Selects the Address field (if configured to be visible).
–	Browser	Ctrl+Shift+B	Selects the browser pane.
–	Toolbar	Alt+I	Selects the browser toolbar.
–	Work Sites	Alt+W	Selects the Work Sites field.
–	Specified Tab	Ctrl+Shift+<tab number>	Takes you to the specified tab, where 0 is the first tab, 1 is the next tab, and so on.
–	–	Shift+click	Opens a link in a new window.
–	–	Ctrl+click or middle mouse button	Opens a link in a new tab in the background.
–	–	Ctrl+Shift+click	Opens a link in a new tab in the foreground.

Accessing Work Sites

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

Accessing Other Websites

The 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 drop-down list.

> **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 10 tabs.

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

To access a website using the Address field:

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

Dialing Hyperlinked Phone Numbers

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

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

  <3-digit area code> <3-digit exchange> <4-digit subscriber number>

  Shorter numbers, such as local numbers without area codes or phone extensions, cannot be dialed.
- You can dial a hyperlinked phone number whenever you are in an agent state where the dial pad is enabled (any state except Logoff).
- The phone number can have parentheses around the area code, and use any combination of spaces, hyphens, and periods in the phone number.
- Phone numbers that are actually image files or are populated from databases cannot be dialed.
- Some web sites hide hyperlinks; the phone number might not look like it is hyperlinked, but it actually is and can be dialed.
- The phone number cannot contain alpha characters. For instance, the phone number 555-GET-PZZA cannot be dialed.

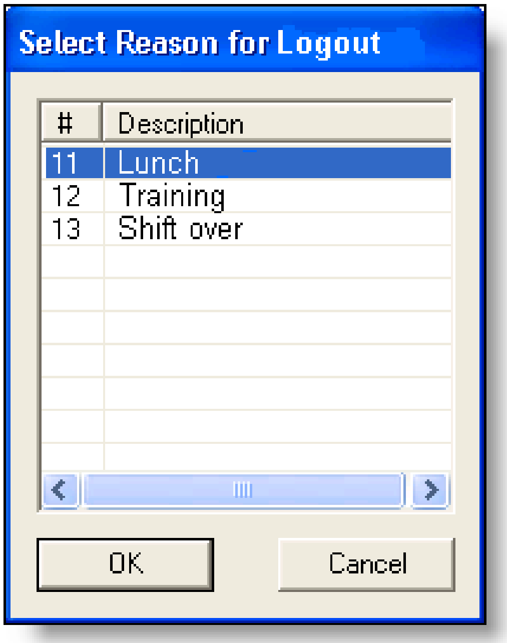
- A dialed hyperlinked phone number will not appear in the Recent Call List in the Dial Pad window.
- The phone number hyperlinks disappear if you refresh the site by right-clicking and choosing the Refresh menu option. To refresh the page without losing the hyperlinks, press F5 or click Refresh on the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

Reason Codes

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

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

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



Select Reason for Logout

#	Description
11	Lunch
12	Training
13	Shift over

You can click the Not Ready or E-Mail Not Ready button again when you are already in the Not Ready or E-Mail Not Ready state. This enables you to enter another reason code. Reports will show back-to-back Not Ready or E-Mail Not Ready state changes with the appropriate times in state and the respective reason codes. However, if you choose the same reason code again, a new state change is not recorded.

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

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

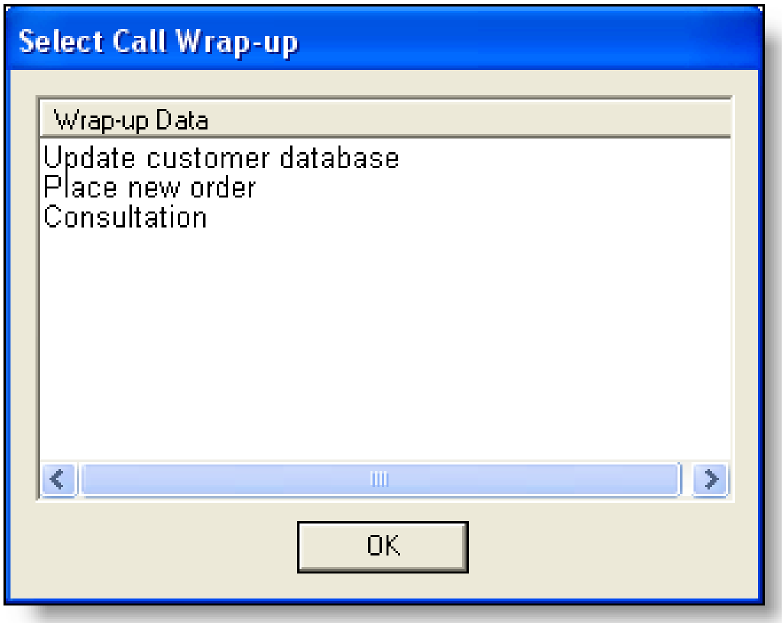
Wrap-up Data

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

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

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

If desired, you can sort the descriptions by clicking the column header.



Select Call Wrap-up

Wrap-up Data

Update customer database

Place new order

Consultation

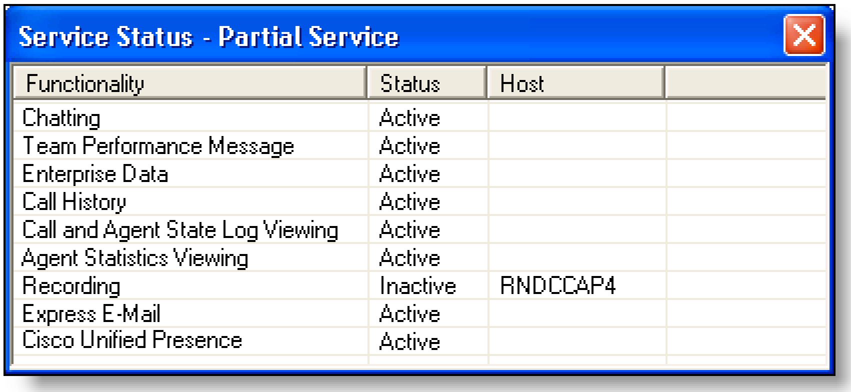
Service Status

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

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

> **Note**: In some situations, you will not recover your connection to Cisco Unified Presence and you must log back into Unified Presence manually.

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



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

> **Note**: The Service Status window displays a snapshot only. To see the most current status, close and then reopen the window.

Phone Network Failure

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

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

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

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