



## **Cisco Supervisor Desktop User Guide**

CAD 8.0 for Cisco Unified Contact Center Express Release 8.0  
Cisco Unified Communications Manager Edition  
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# Cisco Supervisor Desktop User Guide

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## Introduction

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Cisco Supervisor Desktop for Cisco Unified Contact Center Express (Unified CCX) is a robust computer telephony integration solution for IP-based contact centers that is easy to deploy, configure, and manage. It provides supervisors with powerful tools to increase productivity and improve customer satisfaction.

Supervisor Desktop's features allow you to view real time statistics, monitor and coach agents, barge-in, intercept, and record active agent calls when necessary, enabling effective management of agent resources.

## What's New in This Version

Cisco Supervisor Desktop 8.0 includes these new features:

- Ability to view, monitor, barge in, and intercept calls on non-ACD lines when those calls are transferred from an ACD to a non-ACD line through the use of Join across Lines (JAL) or Direct Transfer across Lines (DTAL) functionality.

## Supervisor Desktop Feature Levels

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

The following table outlines the features that are available at each feature level. All features not listed here are present in all three feature levels.

Feature	Standard	Enhanced	Premium
Silent monitoring		x	x
Barge-in		x	x
Intercept		x	x
Recording		x	x
Team messages (TMs)		x	x
E-mail Contact Service Queues (CSQ)			x
Supervisor work flows—threshold alerts for tree control actions		x	x
Supervisor work flows—all actions except threshold alerts for tree control actions			x
Real time displays (text)	x	x	x
Real time displays (charts)			x
Web page push to agents			x
Contact Service Queue statistics	x	x	x
Cisco Unified Personal Communicator	x	x	x

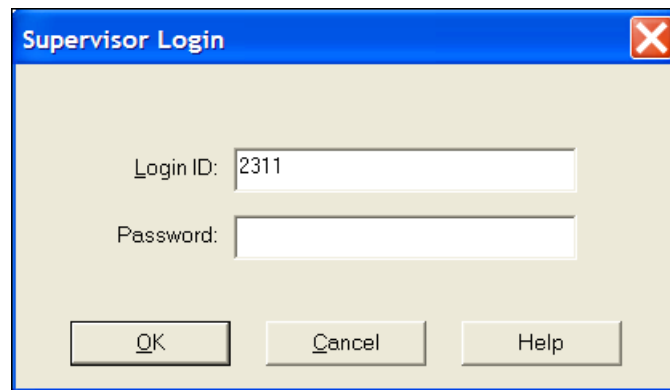
## Starting Supervisor Desktop

If you want to use all of the functionality of Supervisor Desktop, you must first log into Cisco Agent Desktop. For more information, see the *Cisco Agent Desktop User Guide*.

### To start Supervisor Desktop:

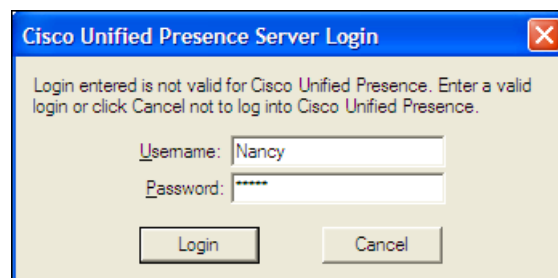
1. Choose Start > Programs > Cisco > Desktop > Supervisor. The login dialog box appears (Figure 1).

Figure 1. Supervisor Login dialog box



2. Enter your Supervisor Desktop login ID and password in the appropriate fields, and then click OK or press Enter. Supervisor Desktop starts, but does not show any data and the status bar displays "No Service".
3. From the Team drop-down list, select a team.
4. If your configuration includes Cisco Unified Presence and you have chosen to log into Unified Presence through Supervisor Desktop (see "[Logging into Cisco Unified Presence](#)" on page 8) and your Unified Presence login is different than your Supervisor Desktop login, the Cisco Unified Presence Server Login dialog box appears (Figure 2). Type your Unified Presence username and password and click Login.

Figure 2. Cisco Unified Presence Server Login dialog box



**NOTE:** In a high availability over WAN triangle configuration (both servers and the CAD client applications communicate over a WAN) and the WAN link between the two servers is down, Supervisor Desktop might not function properly and you might not be able to see all active agents.

The first time you log into Supervisor Desktop:

- Your user ID and password are the same as your Agent Desktop user ID and password.
- The User ID field is empty. The next time you log in, the User ID field is automatically filled with the information you entered before. If you share a computer with another supervisor, verify that this field has your information and not the other supervisor's information.
- It might take some time for Supervisor Desktop to start because default report data must be generated.

## Logging into Cisco Unified Presence

You can log into Cisco Unified Presence through any one of the following applications:

- Cisco Agent Desktop
- Cisco Supervisor Desktop
- Cisco Unified Personal Communicator

**IMPORTANT:** Do not log in to Unified Presence through more than one application, even using different user IDs. Unified Presence cannot communicate with more than one client application on any one computer.

By default, Supervisor Desktop assumes you log into Unified Presence through Agent Desktop. If you choose to log in through Supervisor Desktop, you must configure this option (Enable Cisco Unified Presence) through the Preferences window. See ["Setting Preferences" on page 14](#) for more information.

Information from Unified Presence (for example, non-agent subject matter experts and personal contacts) appears only in the Contact Selection window accessed from the application through which you logged into Unified Presence.

For example, if you log into Unified Presence through Supervisor Desktop, the Supervisor Desktop Contact Selection window will display Unified Presence information, agents, and supervisors, and the Agent Desktop Contact Selection window will display only agents and supervisors.



If you log in to Unified Presence through Unified Personal Communicator, neither Supervisor Desktop nor Agent Desktop will display Unified Presence information, and Unified Personal Communicator will not display agent and supervisor information.

### **Access Through a VPN From Behind a NAT Firewall or Router**

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

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

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

If Supervisor Desktop can log into all services except the Chat service, you must restart Supervisor Desktop after the Chat service comes back online.

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

## Automated Updates

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

### CAD Desktop Applications

Every time you launch Supervisor 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 exists, the software automatically runs the update process.

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

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

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

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

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

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

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

### **Java Runtime Environment**

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

## The Supervisor Desktop Window

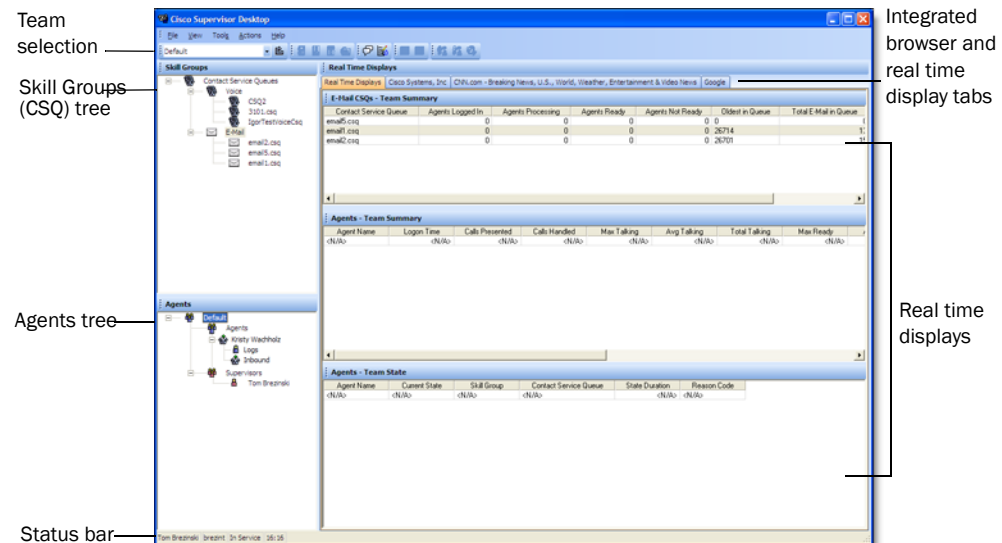
The Supervisor Desktop window is divided into five areas:

- The Skill Groups tree, which lists all of the CSQs associated with the team you choose from the team selection list
- The agents tree, which lists all of the agents and supervisors on the team
- Tabular/graphical real time displays of CSQ information
- Tabular/graphical real time displays of agent and team information
- Integrated browser (if enabled)

The Supervisor Desktop interface is highly configurable. By default, the browser is not enabled and the panes are not dockable. However, you can configure real time displays, enable the integrated browser, and enable all panes to act as dockable windows (so you can move them and resize them independently). You can also change the size of the toolbar icons from the default 16 × 16 pixels to 32 × 32 pixels.

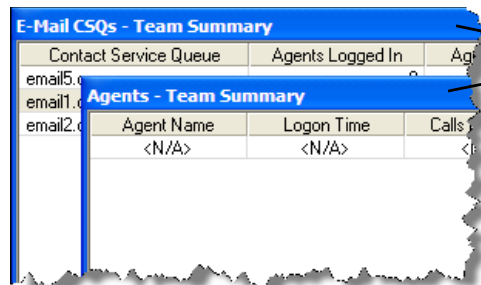
The specific panes that are displayed depends on the nodes that you select in the Skill Groups and Agents tree. If you choose to enable the integrated browser, the real time displays and the browser appear on tabs in the right pane. [Figure 3](#) shows the Supervisor Desktop window in its default configuration.

**Figure 3. Supervisor Desktop interface**



Real time display panes are identified as containing information related to voice CSQs, e-mail CSQs, or agents by the text in their title bars (Figure 4).

Figure 4. Identifying real time displays



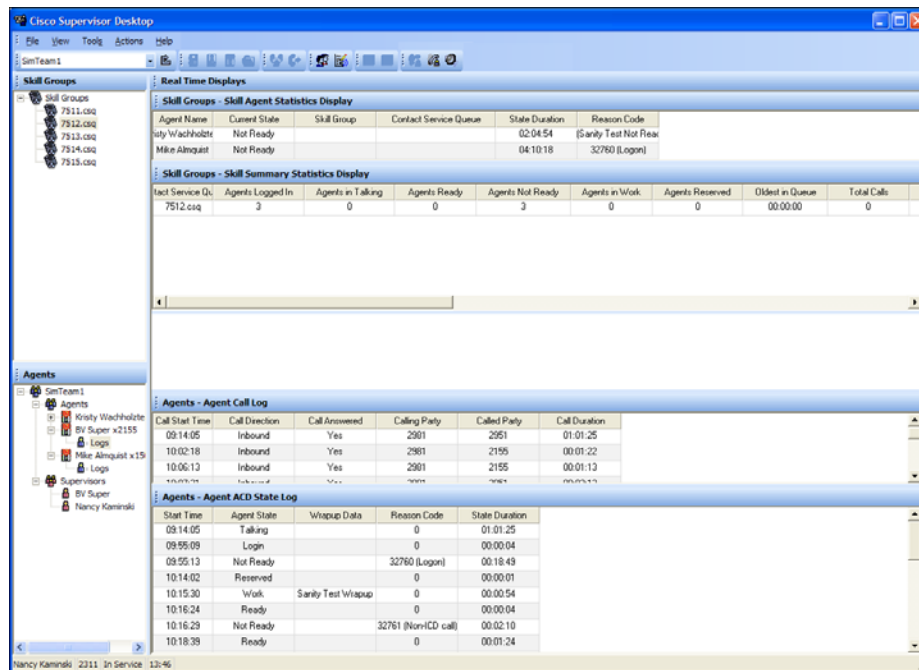
Displays containing E-Mail CSQ information and Agents information.

These displays are in "movable windows" mode: able to be resized and moved anywhere on the desktop

When Supervisor Desktop is in default layout (movable windows are disabled), CSQ real time displays occupy approximately the top half of the right pane, and the Agents real time displays occupy approximately the lower half of the right pane. The tree panes and real time display panes can all be resized by dragging the horizontal splitters up and down and the vertical splitters left and right.

If you choose to enable movable windows (see [Setting Preferences on page 14](#)), all of the real time display panes can be resized and moved anywhere on your desktop. However, each type of display can only dock to another display of its own type. In other words, CSQ displays dock to other CSQ displays and Agent displays dock to other Agent displays. For example, you cannot separate one Agent display from another Agent display, although they can be resized in relationship to each other (Figure 5).

Figure 5. Example of rearranged and resized displays



You can also drag the vertical splitter between the trees panes and the display panes left or right, and the horizontal splitter between the two trees panes up and down.

If you choose to enable the integrated browser, the real time displays and the browser appear on tabs in the area to the right of the Skill Groups and Agents navigation trees.

## Setting Preferences

The Preferences dialog box controls what information is displayed in the display panes and how those panes behave. [Table 1](#) summarizes what you can configure using Preferences.

Table 1. Configurable elements of the Supervisor Desktop interface

Tree Control Node	Available Displays	Configure Columns?	Configure Graphs?	Configure Refresh?
CSQs	Team Summary	Yes	Yes	Yes
Voice > CSQ	Summary	Yes	No	Yes
	Detail	Yes	Yes	No

Table 1. Configurable elements of the Supervisor Desktop interface (cont'd)

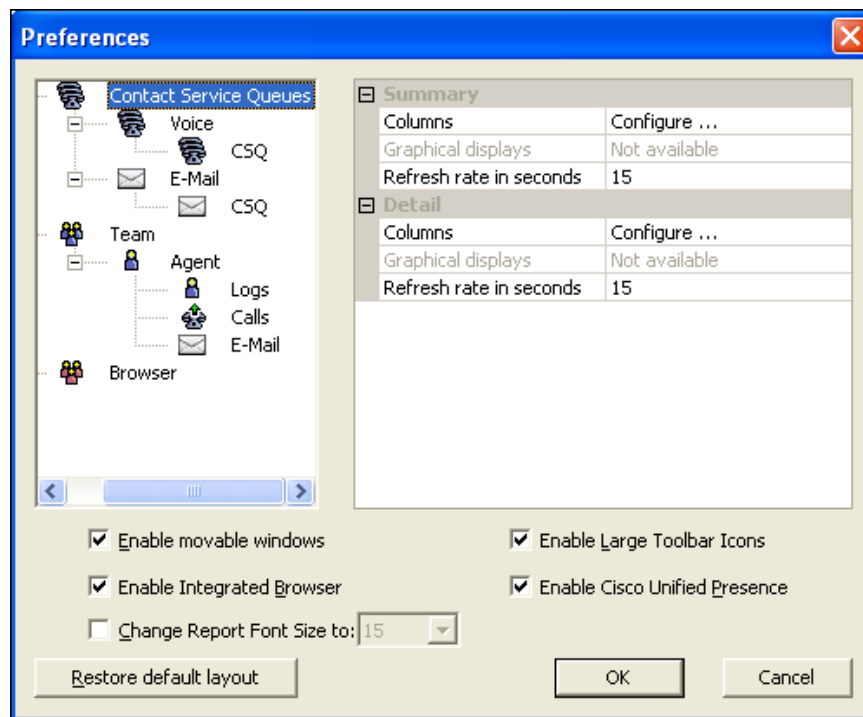
Tree Control Node	Available Displays	Configure Columns?	Configure Graphs?	Configure Refresh?
E-Mail > CSQ*	Summary	Yes	No	Yes
	Detail	Yes	No	Yes
Team	Team Summary	Yes	Yes	Yes
	Team State	Yes	Yes	No
Agent	Agent vs. Team Summary	Yes	Yes	Yes
Logs	State	Yes	No	No
	Call	Yes	No	No
Calls	Active Call	Yes	No	No
	Enterprise Data	Yes	No	No
	Enterprise Call History	Yes	No	No
E-Mail	Active E-Mail	Yes	No	Yes
Browser	Supervisor browser tabs	—	—	—

\* Premium feature level only.

**To set your interface preferences:**

1. Choose View > Preferences. The Preferences dialog box appears (Figure 6).

Figure 6. Preferences window



2. In the left pane, select a node. The right pane displays that node's settings.
 


**NOTE:** If a display element is disabled, it cannot be configured.
3. If you want to configure the columns that are displayed, complete the following steps:
  - a. Select Columns and click the ellipsis (...). The Configure Columns dialog box appears.
  - b. Select the columns you want to appear in the display. Use the up and down arrows to set the order in which you want them to appear.
  - c. Click OK when done.
4. If you want to configure the chart that is displayed, complete the following steps.
  - a. Select Graphical displays and click the ellipsis (...). The Select charts dialog box appears.
  - b. Select the chart you want to appear in the display, then click OK. You can select only one chart for each real time display.



5. If you want to configure the refresh rate, select Refresh rate (in seconds) and adjust the rate.
6. If you want to be able to rearrange the real time display panes, select the Enable movable windows check box.
7. If you want the toolbar icons to be 32 × 32 pixels instead of the default 16 × 16 pixels, select the Enable Large Toolbar Icons check box.
8. If you want to have access to the integrated browser in Supervisor Desktop, select the Enable Integrated Browser check box.
  - To configure a home page that is different from the default of www.cisco.com, select the Browser node in the left pane. Enter a URL in the Browser Home Page field in the right pane, and then click OK.
  - If you want to have access to more than one browser tab, complete the following steps.
    - a. Select the Browser node in the left pane.
    - a. Select a number from 1 to 10 in the Number of Browser Tabs field in the right pane.
    - a. For each additional browser tab, select the tab from the Browser Tab field, then enter a URL in the Browser Home Page field. If you do not enter a home page or you delete an existing URL, the tab will use the Cisco home page (www.cisco.com).
9. If you want to have access to the Unified Presence server, select the Enable Cisco Unified Presence check box. You must restart Supervisor Desktop (and Agent Desktop, if that is running) for this setting to take effect.

## Agents Tree

The Agents tree displays all agents and supervisors on the selected team who are currently logged in. The icon next to the agent's name indicates which agent state the agent is in (see ["Toolbar" on page 20](#) to see examples of the agent state icons).

In addition to the agent state icons, this icon  indicates that an agent is in the Not Ready state and is on a call.

**NOTE:** If you have the Standard feature level, only IP Phone agents appear in the agents tree.

## Formatting Agent Names in the Agents Tree

The Preferences dialog box enables you to control how agent names are displayed in the agents tree.

An agent can be identified by any or all of the following:

- Name
- Extension
- Application used by the agent (CAD, CAD-BE, or Cisco IP Phone Agent (IPPA))

At least one of these must be selected to identify an agent in the agents tree. If all options are selected, the information in the agents tree appears as follows:

Jane Smith x1500 CAD

In this example, Jane Smith is a CAD agent. Her extension is 1500.

***To format agent names in the agents tree:***

1. Choose View > Preferences, and then select the Agents node.
2. In the Format node text grid, check the elements you want to use to identify an agent. You must select at least one element. A sample of what the name will look like appears on the Sample line.
3. Click OK.

## Restoring the Interface Default Layout

To restore Supervisor Desktop to its default layout, open the Preferences window (choose View > Preferences) and click Restore Default Layout.

Clicking this button makes the following changes:

- In the Real Time Displays pane, moves displays to their default positions
- Disables the integrated browser
- Disables movable windows
- Disables any graphical real time displays you selected previously
- Resets the toolbar buttons to the default size
- Resets the report font to the default size
- Disables Cisco Unified Presence

Clicking this button does not make any of the following changes. You must manually resize the columns yourself and reset the other two elements to their default settings in the Preferences window (see ["Setting Preferences" on page 14](#)).

- Resize columns to their default widths
- Restore columns to real time displays that you removed previously
- Reset the report font size to the default (15)

## Accessibility

Supervisor Desktop has a number of features that aid accessibility by vision-impaired users. They are:

- Follows Windows settings for screen resolution and color/contrast settings
- Choice of small (16 × 16 pixels) or large (32 × 32 pixels) toolbar icons (see ["Setting Preferences" on page 14](#))
- Screen reader-compatible tool tips for all controls
- Screen reader-compatible shortcut keys for navigating the application and toolbar (see ["Interface Shortcut Keys" on page 20](#) and ["Toolbar" on page 20](#))

## Interface Shortcut Keys

Shortcut keys are available to navigate the Supervisor Desktop interface. [Table 2](#) lists the shortcut keys.

**Table 2. Accessibility shortcut keys**

Shortcut Keys	Description
Ctrl+Shift+S	Selects the Skill Groups node in the Skill Groups tree.
Ctrl+Shift+A	Selects the Agents node in the Agents tree.
Ctrl+Shift+T	Selects the Team node in the Agents tree.
Ctrl+H	Selects and drops down the Team Selection List.
Shift+A	Set the focus to the Agents tree, selects the Agents node in the Agents tree.
Shift+S	Set the focus to the Agents tree, selects the Supervisors node in the Agents tree.

Once you have set focus to the Skill Groups tree, the Agents tree, or the team node in the agents tree, you can use the tab key to navigate to the real time display panes. Once your focus is in a real time display pane, you can use the arrow keys to navigate around the display grid.

**NOTE:** The tab key will move you among the real time display panes, but the order in which you access them will not necessarily be in sync with the physical arrangement of the display panes on your desktop.

## Toolbar

[Table 3](#) lists the buttons in the Supervisor Desktop toolbar. To view a tooltip explaining a button's function, move your mouse pointer over the button.

**Table 3. Supervisor Desktop toolbar buttons**















Button	Name	Shortcut Key	Description
	Refresh	Ctrl+F	Refreshes the information in the active data view pane.
	Logout	Ctrl+L	Logs the selected agent out of the ACD.
	Ready	Ctrl+E	Puts the selected agent in the Ready state.

Table 3. Supervisor Desktop toolbar buttons (cont'd)

Button	Name	Shortcut Key	Description
	Not Ready	Ctrl+N	Puts the selected agent in the Not Ready state.
	Work	Ctrl+D	Puts the selected agent in the Work state.
	Barge-In	Ctrl+B	Enables you to join the selected agent's phone conversation.
	Intercept	Ctrl+I	Enables you to intercept the selected agent's phone call while disconnecting the agent from the phone call.
	Chat	Ctrl+J	Opens the Chat window.
	Team Message	Ctrl+X	Opens the Team Message dialog box.
	Start Record	Ctrl+R	Starts recording the selected phone call.
	Stop Record	Ctrl+S	Stops recording the selected phone call.
	Start Voice Monitor	Ctrl+A	Starts monitoring the selected agent.
	Stop Voice Monitor	Ctrl+P	Stops monitoring the selected agent.
	Voice Monitor Volume	Ctrl+V	Pops up a slider that enables you to control or mute the volume when monitoring a call.

## Integrated Browser Pane

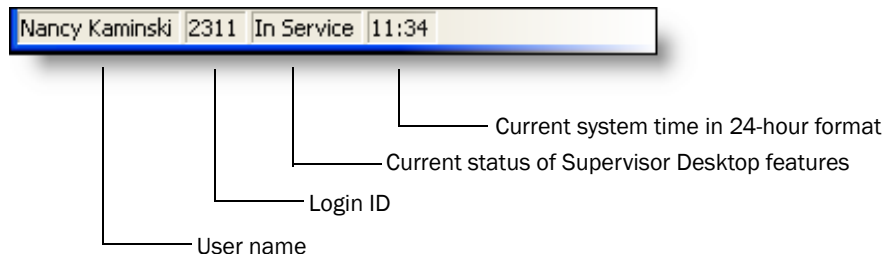
The integrated browser pane allows you to view internet and intranet web pages to help you assist agents and customers. The integrated browser has from 1 to 10 tabs, each of which can display a different web page. You configure each tab to display a specific website.

For more information about this pane, see ["Using the Integrated Browser" on page 55](#).

## Status Bar

The status bar (Figure 7) displays current information about Supervisor Desktop.

Figure 7. Status bar



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

## Real Time Displays

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The real time displays contain the information you need to manage your teams and agents. Real time displays include the following:

- [Agent – Agent vs. Team Summary \(page 24\)](#)
- [Agent Contact – Active Call \(page 27\)](#)
- [Agent Contact – Active E-Mail \(page 27\)](#)
- [Agent Contact – Enterprise Call History \(page 28\)](#)
- [Agent Contact – Enterprise Data \(page 29\)](#)
- [Agent Logs – Call \(page 29\)](#)
- [Agent Logs – State \(page 29\)](#)
- [Agents – Team State \(page 30\)](#)
- [Agents – Team Summary \(page 31\)](#)
- [E-Mail CSQ – Detail \(page 32\)](#)
- [E-Mail CSQ – Summary \(page 33\)](#)
- [E-Mail CSQs – Team Summary \(page 35\)](#)
- [Voice CSQ – Detail \(page 36\)](#)
- [Voice CSQ – Summary \(page 37\)](#)
- [Voice CSQs – Team Summary \(page 40\)](#)

There are two types of displays: tabular and graphical.

- Tabular displays present skill group, team, and agent information in a grid. Tabular information can be sorted in ascending/descending order by clicking any column header in the grid. You can sort by one column only.
- Graphical displays present that same information as bar charts, except for the Agent vs. Team Statistics, which is presented as two pie charts.

**NOTE:** Graphical displays are available at the Premium feature level only.

## Agent – Agent vs. Team Summary

The Agent vs. Team Summary display is available when you select a specific agent in the Agents tree. This display presents the performance details for the agent and compares them to the performance details of the team.

The data is obtained from the CAD Recording & Statistics service, and is for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 30 seconds.

The graphical display (Figure 8) is presented as two pie charts. These pie charts show the percentage of time a specific agent spends in various ACD states in comparison to the percentages spent by the team as a whole.

**NOTE:** Percentages in the pie chart are rounded to two decimal places. As a result, the total of all percentages might not equal 100%.

**NOTE:** If Other Time is a small value, it might not show up as a slice in the graphical display pie chart.

Figure 8. Agent vs. Team Percent Time in State graphical display

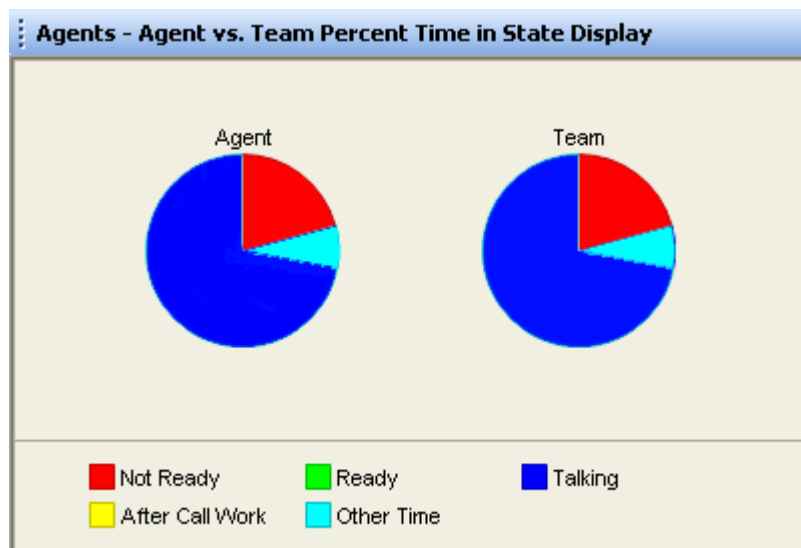




Table 4 lists the fields in the Agent vs. Team Summary display.

Table 4. Agent vs. Team Summary display data

Column Name	Description
ID	Identifies the statistics as for the selected agent or the team.
Logon Time	The amount of time (in seconds) since midnight the agent and team have been logged into Agent Desktop.
Calls Presented	The number of inbound calls (ACD and non-ACD) presented to the agent since midnight.
Calls Handled	The number of inbound calls (ACD and non-ACD) presented to and answered by the agent since midnight.
Max Talking	The longest talk time (in seconds) of all calls handled since midnight.
Avg Talking	The average talk time and hold time (in seconds) of all calls handled since midnight.
Total Talking	The total Reserved time, talk time, and hold time (in seconds) of all calls handled today.
Max Ready	The longest time (in seconds) spent in the Ready state since midnight.
Avg Ready	The average time (in seconds) spent in the Ready state since midnight.
Total Ready	The total time (in seconds) spent in the Ready state since midnight.
Max Not Ready	The longest time (in seconds) spent in the Not Ready state since midnight.
Avg Not Ready	The average time (in seconds) spent in the Not Ready state since midnight.
Total Not Ready	The total time (in seconds) spent in the Not Ready state since midnight.
Max After Call Work	The longest time (in seconds) spent in the Work state since midnight.
Avg After Call Work	The average time (in seconds) spent in the Work state since midnight.
Total After Call Work	The total time (in seconds) spent in the Work state since midnight.

Table 4. Agent vs. Team Summary display data (cont'd)

Column Name	Description
Other Time	The total time (in seconds) spent in states other than Talking, Ready, Not Ready, Reserved, and Work since midnight.
E-Mails Retrieved	The number of e-mails received since midnight.
E-Mails Sent	The number of e-mails sent since midnight.
Max Processing	For all sent e-mail, the longest time (in seconds) spent in the E-Mail Processing state with the e-mail in focus since midnight. All processing time is included, whether it occurred before or after midnight.
Avg Processing	For all sent e-mail, the average time (in seconds) spent in the E-Mail processing state with the e-mail in focus since midnight. All processing time is included.
Total Processing	For all sent e-mail, the total time (in seconds) spent in the E-Mail Processing state with the e-mail in focus since midnight. All processing time is included, whether it occurred before or after midnight.
Max On Desk	For all sent e-mail, the maximum time (in seconds) an e-mail spent on desk since midnight. On-desk time begins when an agent receives an e-mail and ends when the agent sends a reply to that e-mail. All on-desk time is included, whether it occurred before or after midnight.
Avg On Desk	For all sent e-mail, the average time (in seconds) an e-mail spent on desk since midnight. On-desk time begins when an agent receives an e-mail and ends when the agent sends a reply to that e-mail. All on-desk time is included, whether it occurred before or after midnight.
Max E-Mail Ready	The longest time (in seconds) spent in the E-Mail Ready state since midnight.
Avg E-Mail Ready	The average time (in seconds) spent in the E-Mail Ready state since midnight.
Total E-Mail Ready	The total time (in seconds) spent in the E-Mail Ready state since midnight.
Max E-Mail Not Ready	The longest time (in seconds) spent in the E-Mail Not Ready state since midnight.
Avg E-Mail Not Ready	The average time (in seconds) spent in the E-Mail Not Ready state since midnight.

Table 4. Agent vs. Team Summary display data (cont'd)

Column Name	Description
Total E-Mail Not Ready	The total time (in seconds) spent in the E-Mail Not Ready state since midnight.

### Agent Contact – Active Call

The Active Call display is available when you select an active call under a specific agent's name in the Agents tree. This display presents information about each party in the current active call. The data refresh rate is 1 second, and is not configurable.

[Table 5](#) lists the fields in the Active call display.

Table 5. Agent Active Call display data

Column Name	Description
Name	Name of the parties in the call, if known. If this data is not known, <unavailable> is displayed.
Number	The party's phone number.
Call Status	Hook state of the party (Active or Held).
Duration	The length of time the party has been in the call.
Contact Service Queue	The ID of the CSQ that the call was queued to, if applicable.

### Agent Contact – Active E-Mail

The Active E-Mail display is available when you select the E-Mail node underneath a specific agent's name in the Agents tree.

This display presents a summary of the e-mails the agent is working on. The data is for the current day starting at midnight. The data refresh rate is 1 second, and is not configurable. [Table 6](#) lists the fields in the Active E-mail display.

Table 6. Active E-Mail display data

Field	Description
From	The sender of the e-mail.
To	The recipient of the e-mail.
Subject	The subject of the e-mail.
Date Received	The date the e-mail was received.

Table 6. Active E-Mail display data (cont'd)

Field	Description
Date Retrieved	The date the e-mail was retrieved from the queue by the agent.
In Process Duration	The length of time the agent spent processing the e-mail. Processing time includes all time that the agent was in E-Mail Processing state with the e-mail in focus.
On Desk Duration	The length of time the e-mail was on the agent's desk. On-desk time begins when an agent receives an e-mail and ends when the agent sends a reply to that e-mail.
Contact Service Queues	The name of the CSQ to which the e-mail was routed.

### Agent Contact – Enterprise Call History

The Enterprise Call History display is available when you select an active call under a specific agent's name in the Agents tree. This display presents a history of the call's presence in the contact center. The data refresh rate is 1 second, and is not configurable. [Table 7](#) lists the fields in the Enterprise Call History display.

Table 7. Enterprise Call History display data

Column Name	Description
Threshold	The acceptable amount of time a call can remain at a particular device or contact center. The 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 this field.
Device	A device that the call has passed through.
Type	The type of device the call has passed through.
Description	Description of the device.
Duration	The amount of time the call spends at a device.

## Agent Contact – Enterprise Data

The Enterprise Data display is available when you select an active call under a specific agent's name in the Agents tree. The data displayed is configured by your administrator. The data in the report can be refreshed manually by clicking the Refresh button on the toolbar.

## Agent Logs – Call

The Call display is available when you select the Logs node underneath a specific agent's name in the Agents tree.

This display presents a history of the calls made and received by the agent during the current session. By default, the data displayed is sorted in ascending order by time of day. The data in the report can be refreshed manually by clicking the Refresh button on the toolbar. [Table 8](#) lists the fields in the Call display.

**Table 8. Call display data**

Column Name	Description
Start Time	The time the call was answered.
Direction	Inbound or outbound call.
Answered	(Yes/No) Answered or unanswered call.
Calling Party	The originating phone number.
Called Party	The recipient phone number.
Call Duration	The length of the call.

## Agent Logs – State

The State display is available when you select the Logs node underneath a specific agent's name in the Agents tree.

This display presents a history of the ACD states the agent transitioned through during the current session. By default, the data displayed is sorted in ascending order by time of day. The data in the report can be refreshed manually by clicking the Refresh button on the toolbar. [Table 9](#) lists the fields in the State display.

**Table 9. State display data**

Column Name	Description
Start Time	The time the agent state was initiated.
Agent State	The ACD agent state.

Table 9. State display data (cont'd)

Column Name	Description
Wrap-up Data	Any wrap-up data the agent entered, if the agent state transitioned to after ending a call or sending an e-mail is Work (after-call work).
Reason Code	Any reason code the agent entered, if the agent state transitioned to is Not Ready or Logout (if required).
State Duration	The length of time the agent was in the agent state.

## Agents – Team State

The Team State display is available when you select the Team node or Agents node in the Agents tree. This display presents the performance details for each agent on the team. By default, the data displayed is sorted in ascending order by agent name.

**NOTE:** If the agent is assigned to a new team while logged in, that agent will still show up as a member of the old team in the Team State display until the agent logs out and logs in again. Then the agent will show up as a member of the new team in the Team State display.

The data is obtained from the CAD Chat service, and is for the current day starting at midnight. The data refresh rate is 1 second, and is not configurable.

The graphical display of the information consists of a bar chart with ACD states on the Y axis and the number of agents currently in each ACD state. [Table 10](#) lists the fields in the Team State display.

Table 10. Team State display data

Column Name	Description
Agent Name	The agent's name.
Agent ID	The agent's ID.
Current State	The agent's current ACD state.
Skill Group	The skill group ID of the call the agent is currently servicing (in Talking state). If there is no call, or if the call is a non-ACD call, this field is blank.
Contact Service Queue	Name of the CSQ.
State Duration	The amount of time (in seconds) that the agent has been in the current ACD state.

Table 10. Team State display data (cont'd)

Column Name	Description
Reason Code	The reason why the agent is in the current ACD state. Reason codes are available for the Not Ready and Logout states only.

## Agents – Team Summary

The Team Summary display is available when you select the Team node or Agents node in the Agents tree.

This display presents the real time state of the agents on the selected team who are currently logged into the ACD. By default, the data displayed is sorted in ascending order by agent name.

**NOTE:** If the agent is assigned to a new team while logged in, that agent will still show up as a member of the old team in the Team Summary display until the agent logs out and logs in again. Then the agent will show up as a member of the new team in the Team Summary display.

The data is obtained from the CAD Recording & Statistics service, and is for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 30 seconds.

Graphical displays of the information consist of bar charts with agent names on the Y axis and the average amount of time (hh:mm:ss) the agent spent in a selected ACD state. [Table 11](#) lists the fields in the Team Summary display.

Table 11. Team Summary display data

Column Name	Description
Agent Name	The agent's name.
Agent ID	The agent's ID.
Logon Time	The total amount of time the agent has been logged into the ACD today.
Calls Presented	The number of inbound calls (ACD and non-ACD) presented to the agent today.
Calls Handled	The number of inbound calls (ACD and non-ACD) presented to and answered by the agent today.

Table 11. Team Summary display data (cont'd)

Column Name	Description
Max Talking	The longest talk time of all calls handled today.
Avg Talking	The average talk time and hold time of all calls handled today.
Total Talking	The total Reserved time, talk time, and hold time of all calls handled today.
Max Ready	The longest time the agent spent in the Ready state today.
Avg Ready	The average time the agent spent in the Ready state today.
Total Ready	The total time the agent spent in the Ready state today.
Max Not Ready	The longest time the agent spent in the Not Ready state today.
Avg Not Ready	The average time the agent spent in the Not Ready state today.
Total Not Ready	The total time the agent spent in the Not Ready state today.
Max After Call Work	Longest time spent in the Work state.
Avg After Call Work	The total time spent in the Work state divided by the number of times spent in the Work state.
Total After Call Work	The total time spent in the Work state.
Other Time	The total time (in seconds) the agent spent in states other than Talking, Ready, Not Ready, Reserved, and Work since midnight.

### E-Mail CSQ – Detail

The Detail display is available when you select a specific CSQ from the Contact Service Queues > E-Mail tree.

The data is for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 60 seconds.



There is no graphical display available for these statistics. [Table 12](#) lists the fields in the Detail display.

**Table 12. Detail display data**

Column Name	Description
Agent Name	The agent's name.
Current Voice State	The agent's current voice agent state.
Voice State Duration	The length of time the agent has been in the current voice agent state.
Voice Reason Code	The reason code the agent selected when transitioning to the current voice agent state.
Current E-Mail State	The agent's current e-mail state.
E-Mail State Duration	The length of time the agent has been in the current e-mail state.
E-Mail Reason Code	The reason code the agent selected when transitioning to the current e-mail state.
Contact Service Queue	The name of the CSQ for which the agent is currently handling a contact, if any.
Contact Service Queue ID	The ID of the CSQ for which the agent is handling a contact, if any.
Media	The media type of the CSQ, Voice or E-Mail.

### E-Mail CSQ – Summary

The Summary display is available when you select a specific CSQ from the Contact Service Queues > E-Mail tree.

The data is for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 60 seconds.

There is no graphical display available for these statistics. [Table 13](#) lists the fields in the Summary display.

**Table 13. Summary display data**

Column Name	Description
Contact Service Queue	Name of the CSQ.

Table 13. Summary display data (cont'd)

Column Name	Description
Agents Logged In	The number of agents in this CSQ who are currently logged in.
Agents Processing	The number of agents in this CSQ who are currently in the Processing E-Mail state.
Agents Ready	The number of agents in this CSQ who are currently in the Ready state.
Agents Not Ready	The number of agents in this CSQ who are currently in the Not Ready state.
Oldest in Queue	Of the e-mails currently in queue for this CSQ, the length of time in queue (in seconds) of the e-mail that has been in the queue the longest.
Total E-Mail in Queue	The current number of e-mails in queue that have not been routed to an agent.
Total E-Mails Received	The number of e-mails routed to this CSQ since the Start Time.
Handled Today	The number of e-mails routed through this CSQ that agent have sent since midnight. The time of the sent event determines whether the e-mail is included in the count.
Average Handle	The average processing time for e-mails sent since midnight. All the processing time is included for the e-mail, including any time before or after midnight.
Average Response	The average response time for e-mails sent since midnight. Response time is the difference between the times the e-mail was received and sent. All the response time is included for the e-mail, including any time before or after midnight.
Longest Handle	Of the e-mails routed through the CSQ and sent since midnight, the handle time (in seconds) for the e-mail with the longest handle time. All the processing time is included for the e-mail, including any time before or after midnight.
Longest Response	Of the e-mails routed through the CSQ and sent since midnight, the response time for the e-mail with the longest response time (in seconds). All the response time is included for the e-mail, including any time before or after midnight.

## E-Mail CSQs – Team Summary

The Team Summary display is available when you select the Contact Service Queues > E-Mail node.

**NOTE:** If the agent is assigned to a new team while logged in, that agent will still show up as a member of the old team in the E-mail CSQs – Team Summary display until the agent logs out and logs in again. Then the agent will show up as a member of the new team in the E-mail CSQs – Team Summary display.

The data is for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 60 seconds.

There is no graphical display available for these statistics. [Table 14](#) lists the fields in the Team Summary display.

**Table 14.** Team Summary display data

Column Name	Description
Contact Service Queue	The name of the CSQ.
Agents Logged In	The number of agents currently logged in who support the CSQ.
Agents Processing	The number of agents currently in the Processing E-Mail state who support the CSQ.
Agents Ready	The number of agents currently in the E-Mail Ready state who support the CSQ.
Agents Not Ready	The number of agents currently in the E-Mail Not Ready state who support the CSQ.
Oldest in Queue	Of the e-mails currently in queue for this CSQ, the length of time in queue (in seconds) of the e-mail that has been in the queue the longest.
Total E-Mail in Queue	The current number of e-mails in queue that have not been routed to an agent.
Total E-Mails Received	The number of e-mails routed to the CSQ since midnight.
Handled Today	The number of e-mails routed through the CSQ that agents sent since midnight. The time the e-mail was sent determines whether the e-mail is included in this count.

Table 14. Team Summary display data (cont'd)

Column Name	Description
Average Handle	The average e-mail processing time for e-mails sent since midnight. All the processing time is included for the e-mail, including any time before or after midnight.
Average Response	The average response time for e-mails sent since midnight. Response time is the difference between the times the e-mail was received and sent. All the response time is included for the e-mail, including any time before or after midnight.
Longest Handle	Of the e-mails routed through the CSQ and sent since midnight, the handle time (in seconds) for the e-mail with the longest handle time. All the processing time is included for the e-mail, including any time before or after midnight.
Longest Response	Of the e-mails routed through the CSQ and sent since midnight, the response time for the e-mail with the longest response time (in seconds). All the response time is included for the e-mail, including any time before or after midnight.

## Voice CSQ – Detail

The Voice CSQ–Detail display is available when you select a specific CSQ from the Skill Groups tree.

This display presents information about each agent logged into the ACD and assigned to the selected CSQ. By default, the data displayed is sorted in ascending order by agent name.

The data is obtained from the CAD Chat service, and are for the current day starting at midnight. The data refresh rate is 1 second, and is not configurable.

The graphical display of this information consists of a bar chart with the ACD states on the Y axis and the number of agents on the X axis. [Table 15](#) lists the fields in the CSQ Detail real time display.

Table 15. CSQ Detail real time display data

Column Name	Description
Agent Name	The agent's name.
Agent ID	The agent's ID.

Table 15. CSQ Detail real time display data (cont'd)

Column Name	Description
Current State	The agent's current ACD state.
Skill Group	The skill group ID of the ACD call the agent is currently servicing (in Talking state). If there is no call, or if the call is a non-ACD call, this field is blank.
Contact Service Queue	Name of the CSQ.
State Duration	The amount of time (in seconds) that the agent has been in the current ACD state.
Reason Code	The reason why the agent is in the current ACD state. Reason codes are available for the Not Ready and Logout states only.

### Voice CSQ – Summary

The CSQ – Summary display is available when you select a specific CSQ from the Skill Groups tree.

This display presents a summary of a specific CSQ's statistics. These statistics are from the entire contact center, not just from members of the selected team.

The data is obtained from the CTI server unless otherwise noted, and are for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 60 seconds.

**NOTE:** Even though you can configure the refresh rate, it is still dependent on how often the Enterprise service queries the CTI service (every 10 seconds). If the refresh rate is changed to a shorter time interval, the display will be refreshed at that interval, but the statistics might not change until the Enterprise service receives the updated information from the CTI service.

There is no graphical display available for these statistics. [Table 16](#) lists the fields in the Team Summary display.

Table 16. CSQ–Summary display data

Field	Description
Contact Service Queue	Name of the CSQ.
Agents Logged In	Number of agents currently logged into the system.

Table 16. CSQ–Summary display data (cont'd)

Field	Description
Agents in Talking	Number of agents currently in the Talking state.
Agents Ready	Number of agents currently in the Ready state.
Agents Not Ready	Number of agents currently in the Not Ready state.
Agents in Work	Number of agents currently in the Work state.
Agents Reserved	Number of agents currently in the Reserved state.
Current Oldest	The number of calls in queue and the elapsed wait time of the oldest call in the queue, displayed in the format “x [hh:mm:ss]”, where X is the number of calls and hh:mm:ss is the elapsed wait time.
Total Calls	Total number of calls that have arrived, including calls waiting, calls connected to agents, and calls that have disconnected.
Handled Calls Today	Number of calls handled by the CSQ for the current reporting period. A call is considered to be handled when an agent picks up the call.
Calls Abandoned	Number of calls that were routed to the CSQ but were not answered by an agent because the caller hung up or was disconnected.
Calls De-queued	Number of calls that were dequeued. A call is considered to be dequeued from a particular CSQ if the call is handled by an agent in another CSQ. This situation can occur when a call is queued for more than one CSQ.
Start Time	Starting date and time of the current reporting period.
End Time	Ending date and time of the current reporting period.
Talk Average	Average talk time for all calls handled by agents. Talk time is the elapsed time between the time that an agent connects to a call and when the call is disconnected or transferred, not including hold time.
Average Waiting Duration	Average wait time for calls routed to the CSQ. Wait time is the elapsed time between the time a call entered the queue and the time the call was answered by an agent or was disconnected.

Table 16. CSQ-Summary display data (cont'd)

Field	Description
Longest Talking	Longest talk time of any one call that agents have handled. Talk time is the elapsed time between the time that an agent connects to a call and when the call is disconnected or transferred, not including hold time.
Longest Waiting	Longest wait time for any one call routed to the CSQ. Wait time is the time that elapsed between the time a call entered the queue and the time the call was answered by an agent or was disconnected.
Calls Priority 1... Calls Priority 10	Total number of Priority N calls that were routed to each CSQ.

## Voice CSQs – Team Summary

The Team Summary display is available when you select the Skill Groups node in the Skill Groups tree.

This display presents the details of each individual skill group, regardless of whether or not an agent with that skill is logged in. By default, the data displayed is sorted in ascending order by skill name.

The data is obtained from the CTI server unless otherwise noted, and are for the current day starting at midnight. The data refresh rate is configurable. By default it is every 15 seconds. The minimum rate is 5 seconds, and the maximum rate is 60 seconds.

**NOTE:** Even though you can configure the refresh rate, it is still dependent on how often the Enterprise service queries the CTI service (every 10 seconds). If the refresh rate is changed to a shorter time interval, the display will be refreshed at that interval, but the statistics might not change until the Enterprise service receives the updated information from the CTI service.

Graphical displays of this information consist of bar charts with the skill name on the Y axis and any of the available statistics listed in the table below on the X axis, expressed in either an integer (0, 1, 2...) or time duration (hh:mm:ss). [Table 17](#) lists the fields in the Team Summary display.

**Table 17. Team Summary display data**

Field	Description
Contact Service Queue	Name of the CSQ.
Agents Logged In	Number of agents currently logged into the system.
Agents in Talking	Number of agents currently in the Talking state.
Agents Ready	Number of agents currently in the Ready state.
Agents Not Ready	Number of agents currently in the Not Ready state.
Agents in Work	Number of agents currently in the Work state.
Agents Reserved	Number of agents currently in the Reserved state.
Current Oldest	The number of calls in queue and the elapsed wait time of the oldest call in the queue, displayed in the format "x [hh:mm:ss]", where X is the number of calls and hh:mm:ss is the elapsed wait time.



Table 17. Team Summary display data (cont'd)

Field	Description
Total Calls	Total number of calls that have arrived, including calls waiting, calls connected to agents, and calls that have disconnected.
Handled Calls Today	Number of calls handled by the CSQ for the current reporting period. A call is considered to be handled when an agent picks up the call.
Calls Abandoned	Number of calls that were routed to the CSQ but were not answered by an agent because the caller hung up or was disconnected.
Calls De-queued	Number of calls that were dequeued. A call is considered to be dequeued from a particular CSQ if the call is handled by an agent in another CSQ. This situation can occur when a call is queued for more than one CSQ.
Start Time	Starting date and time of the current reporting period. If there is a failover, the start time reflects the time when the failover occurred.
End Time	Ending date and time of the current reporting period.
Talk Average	Average talk time for all calls handled by agents. Talk time is the elapsed time between the time that an agent connects to a call and when the call is disconnected or transferred, not including hold time.
Average Wait Duration	Average wait time for calls routed to the CSQ. Wait time is the elapsed time between the time a call entered the queue and the time the call was answered by an agent or was disconnected.
Longest Talking	Longest talk time of any one call that agents have handled. Talk time is the elapsed time between the time that an agent connects to a call and when the call is disconnected or transferred, not including hold time.
Longest Waiting	Longest wait time for any one call routed to the CSQ. Wait time is the time that elapsed between the time a call entered the queue and the time the call was answered by an agent or was disconnected.
Calls Priority 1 Calls Priority 10	Total number of Priority N calls that were routed to each CSQ.

## Monitoring Agents

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The voice monitor button enables you to silently listen in on an agent's phone conversations.

Voice monitoring is available whenever an agent is logged in, whether or not the agent is on the phone. It is not available when:

- You are a participant in a phone call (you cannot monitor yourself).
- You use the Barge-In or Intercept function.

The Voice Monitor Volume button allows you to control the volume when monitoring an agent's phone conversation. The system remembers your last volume setting and uses it the next time you log in.

### ***To start monitoring an agent:***

1. Choose an agent in the Agents tree.
2. Click the Start Voice Monitor button, or choose Intervention > Start Voice Monitor.

### ***To stop monitoring an agent:***

- Click the Stop Voice Monitor button, or choose Intervention > Stop Voice Monitor.

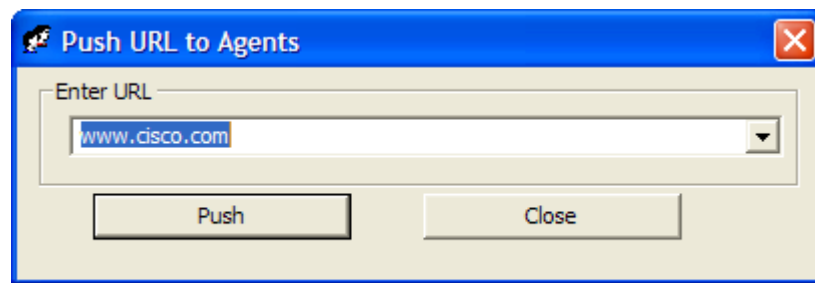
## Pushing a Web Page to an Agent

You can coach an agent by pushing a web page to that agent's Agent Desktop integrated browser.

*To push a web page to an agent:*

1. From the Agents tree, select an agent.
2. Choose Intervention > Coach by Pushing a Page. The Push URL to Agents dialog box appears (Figure 9).

Figure 9. Push URL to Agents dialog box



3. Enter the URL of the web page you want the agent to see, and then click Push to send the web page to the agent. The web page you pushed to the agent is displayed in the first tab of the agent's integrated browser. This tab is reserved for pushed web pages.

**NOTE:** There are no restrictions on what you can enter as a URL (for example, you are not required to prefix the URL with "http://") as long as the URL can be resolved by a browser. Some sites require that "http" or "https" be part of the URL.

**NOTE:** If the integrated browser is not enabled for the selected agent (by default, it is not enabled in CAD-BE), this operation will fail, but no error message will appear.

## Barging In On Calls

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If enabled by the administrator, the Barge-In feature allows you to join an agent's phone conversation. When you click the Barge-In button, you are automatically added to the phone call. It is a forced conference.

**NOTE:** To barge in on a call, you must first be logged into Agent Desktop.

**NOTE:** You can barge in only once on a call per supervisor. For example, if you barge in on a call, drop out of the conversation, and then attempt to barge in on the same call again, you will not be able to do so.

If notification is enabled, the agent sees a message that you are attempting to join the call, then sees a message that you have successfully joined it.

When you use the Barge-In feature, voice monitoring is disabled. You can, however, record calls.

You cannot barge in if any of the following conditions are true:

- The agent is on hold
- The agent is on two calls
- The agent is in a conference call
- You are already on another call

### ***To barge in:***

1. Select an agent call in the team view pane.
2. Click the Barge-In button or choose Intervention > Barge-In. You are added to the call.

At any time during the conference call, you can click Intercept to disconnect the agent whose call is selected from the conference call and continue talking with the remaining parties yourself.

### ***To drop the barged-in call:***

- In Cisco Agent Desktop, select the conference call from the dashboard and then click Drop.

## Intercepting Calls

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If enabled by the administrator, the Intercept feature enables you to intercept an agent's phone call while disconnecting the agent from that phone call. It is a forced transfer.

**NOTE:** To intercept a call, you must first be logged into Agent Desktop.

**NOTE:** You can intercept a call only once. For example, if you intercept a call, drop out of the conversation, and then attempt to intercept the same call again, you will not be able to do so.

If notification is enabled, the agent sees a message that you are attempting to intercept the phone call, then sees a further message when the interception is successful.

When you use the Intercept feature, voice monitoring is disabled. You can, however, record calls.

You cannot intercept if any of the following conditions are true:

- The agent is on hold
- The agent is on two calls
- You are already on another call

### ***To intercept a phone call:***

1. Select an agent call in the team view pane.
2. Click the Intercept button or choose Intervention > Intercept. The call is transferred to you.

If you are intercepting a conference call you are on, the agent call you selected in the team view pane is dropped from the conference call, and all other participants in the conference call remain connected.

### ***To drop the intercepted call:***

- In Agent Desktop, select the intercepted call from the dashboard and then click Drop.

## Recording Calls

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You can use Supervisor Desktop to record, save, and play back calls handled by agents on your team. Multiple recordings can be in progress at the same time, although only one recording can be made per agent at any one time. You use the Supervisor Record Viewer to review recorded calls.

You can use the Barge-In, Intercept, and Voice Monitor features while recording.

When recording a call, keep in mind the following considerations:

- The recording feature is not intended to record every call. It is an on-demand solution only.
- When you select a specific call from the Team View pane to record, all voice activity to and from that particular agent is recorded. The recording is not limited to the call you selected. For instance, if the agent puts the selected call on hold and switches to another call, both calls will be recorded.
- The recording will end when the selected call terminates, or when you manually stop recording, whichever comes first.
- Agents can be configured so that they can start and stop recording calls. However, an agent cannot stop a recording started by a supervisor. If an agent attempts to do so, their Agent Desktop or IPPA interface indicates the recording is stopped. However, the recording is not stopped, and Supervisor Desktop displays an icon indicating that recording is proceeding.
- You can stop a recording initiated by an agent.
- If notification is off, agents have no way of knowing if you are recording their calls. If an agent attempts to start recording a call that you are already recording, the agent will see a recording icon on the call, although the agent is not in control of the recording.
- When you or an agent record a call, a recording license is used. The license is released when the recording stops. If all recording licenses are in use when you attempt to start a recording, the recording will not start.

**NOTE:** When you receive a message saying the recording has failed due to the server running out of disk space, you free the space for new recordings by deleting the existing recordings in the Supervisor Record Viewer.

### **To record a call:**

1. Choose the call you want to record from the Agents tree.
2. Click the Start Record button, or choose Intervention > Call/Agent Start Recording.

3. When you are finished, click the Stop Record button, or choose Intervention > Call/Agent Stop Recording. The call is archived to the Recording service database, where it is automatically saved for seven days.

**NOTE:** If you want to save the recording for a longer period, you can do so for up to 30 days, after which it is deleted. For more information on playing and saving recordings, see ["Using Supervisor Record Viewer" on page 70](#).

## Changing Agents' ACD States

---

You can use Supervisor Desktop to change the ACD state of an agent on your team, including logging an agent out.

**NOTE:** If you log a CAD agent out, that agent will continue to appear in the agents tree and will be able to chat and receive team messages. If you log out an IPPA or CAD-BE agent, that agent disappears from the agents tree.

### *To change an agent's agent state:*

1. From the Agents tree, select the agent whose state you want to change.
2. On the toolbar, click the appropriate agent state button.

**NOTE:** There is a delay of about 2 to 3 seconds before the command to change agent state takes effect. To ensure you set the desired agent state, allow enough time between clicking Agent State buttons for the command to take effect.

**NOTE:** If an agent state change fails, you will not see any failure message. You will know that an agent state change succeeds if the icon next to the agent's name in the team view pane changes to the current agent state icon.



## Using Chat

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

Figure 10 displays the Contact Selection window of a supervisor who is also logged into Unified Presence.

Figure 10. Contact Selection window



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

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

- The Agents drawer lists all the agents on the team selected in Supervisor Desktop. 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 it changes. Agents do not have to be currently logged into Agent Desktop to be listed here, but they must have Agent Desktop open and they must have logged in at least once.
- The Supervisors drawer lists all supervisors on your team. Their status is always listed as Available. Supervisors must be logged in to be listed here.
- The Conference drawer appears when you are on a conference call with other agents. SMEs, if they are on the conference call, are not listed here.

- The Personal Contacts drawer appears if you have this drawer set up in 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 your agents 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:** You cannot chat with CAD-BE agents or IP Phone agents.

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

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

Some Chat features include:

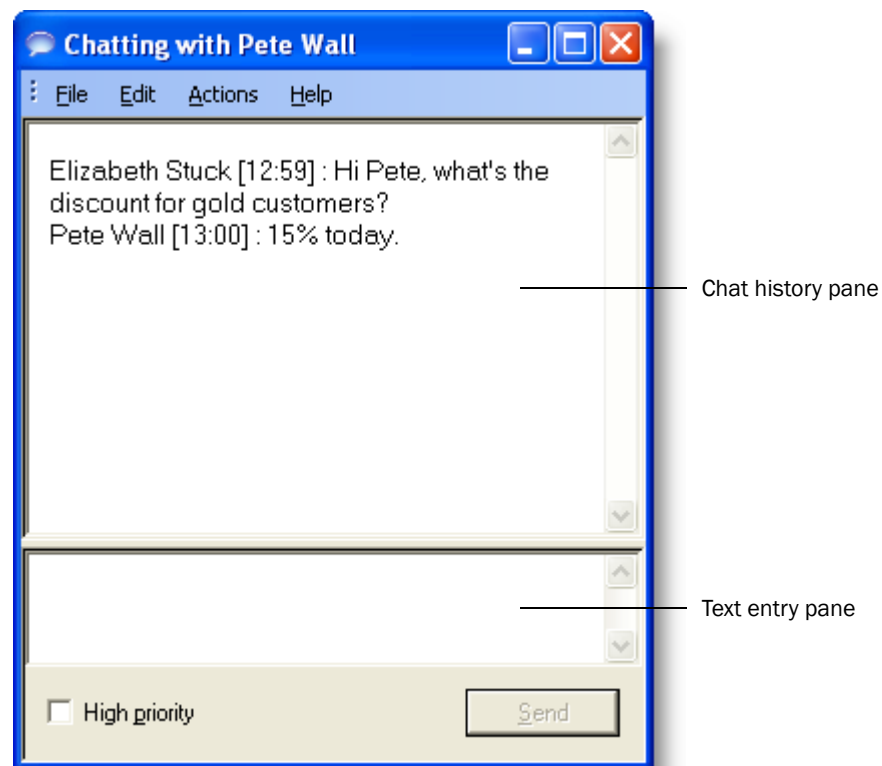
- You can send the same chat message to multiple recipients (their replies, if any, appear in separate chat windows, one for each person).
- You can participate in multiple concurrent chat sessions.
- The title bar of the Chat window displays the name of the person with whom you are chatting.
- If you flag a chat message as high priority, the Chat window will pop on the other person's screen so the message will be noticed immediately.
- If the priority of a chat message is normal (the default), the Chat window will remain in its current state (open or minimized) and the corresponding icon will flash on your Windows task bar.
- A log of the chat messages sent between you and your chat partner (chat history) is available as long as the Chat window is open. After you close the Chat window, the log is lost.
- Chat history is in chronological order, with the oldest messages at the top of the log pane.
- You can chat with agents who are logged out of the ACD as long as they still have Agent Desktop open.

## Sending a Chat Message

### To initiate a chat session:

1. On the toolbar, click Chat. The Contact Selection window appears (see [Figure 10 on page 49](#)). This window lists the names and status of people with whom you can chat.
2. To chat with one person, double-click that person's name. To chat with several people, select their names and press Enter or choose Actions > Chat. A Chat window opens and a session begins with the people you selected ([Figure 11](#)).

Figure 11. Chat session window



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

Replies from recipients of a group message appear in individual chat session windows. They cannot reply to the group, they can reply only to you.

**To terminate a chat session:**

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

## Predefined High-Priority Chat Messages

Agents might have a task button in Agent Desktop and CAD-BE configured to send a predefined high-priority chat message to their supervisor(s). This predefined message (for example, “Please barge in on my call”) is set up by the administrator. It behaves just like a regular chat message that is flagged as high priority—it pops up on your screen on top of all other windows for your immediate attention.

You can reply to a predefined high-priority chat message from a CAD agent. You cannot reply to one sent by a CAD-BE agent, since CAD-BE does not include two-way Chat functionality.

## Calling Someone in Your Chat List

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

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

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

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

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

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

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

2. Click Dial.

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

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

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

2. Click Dial.

## Monitoring Agent-Deleted E-Mail

---

Agents are able to delete e-mail that is delivered to their inbox. Some reasons for deleting an e-mail are:

- the e-mail is spam
- the e-mail is abusive

The deleted e-mail is not actually deleted, it is transferred to an e-mail address set up by the administrator in Cisco Desktop Administrator. Supervisors can access that e-mail account using any e-mail client (for example, Microsoft Outlook) and determine if the e-mails should be deleted or sent back to the e-mail queue and handled by an agent.

Consult with your system administrator for the procedure for accessing agent-deleted e-mails.

## Using the Integrated Browser

The integrated browser enables you to view intranet and internet web pages from within Supervisor Desktop. When enabled, the browser appears as a tab in the real time display pane, with up to 20 characters of the name of the current web page displayed on the tab. The real time displays appear on another tab in that pane.

**NOTE:** You must have Internet Explorer 7 or 8 installed on your PC for the integrated browser to function.






By default, the browser is not enabled. See "[Setting Preferences](#)" on page 14 for instructions on enabling the browser and configuring a home page.

The Address field's drop-down list contains the URLs of the last 25 websites visited for quick access to frequently-visited websites.

### Browser Toolbar

The browser toolbar contains basic browser buttons that allow you to navigate among web pages you view, refresh a current page, and return to your home page. [Table 18](#) lists the buttons in the browser toolbar.

**Table 18. Browser toolbar buttons**

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

## Sending Team Messages

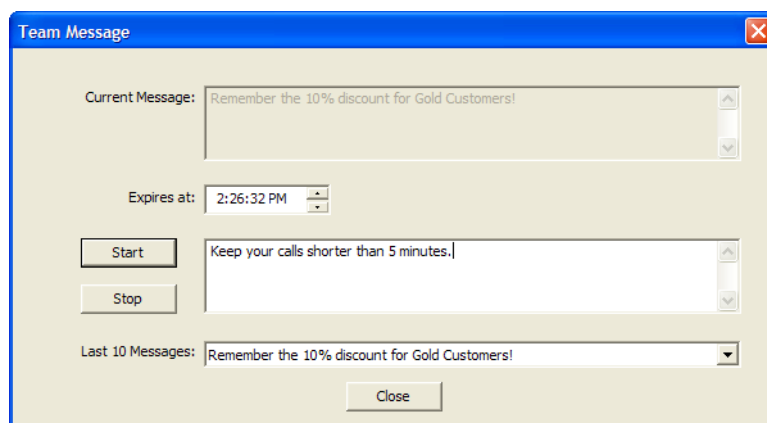
You can send a team message to all CAD agents on a team, whether or not the agent is logged into the ACD. As long as Agent Desktop is open, an agent can view a team message.

**NOTE:** You cannot send team messages to CAD-BE or IP Phone agents.

**NOTE:** If the Chat service is restarted or the server that hosts the Chat service fails over, any active team messages are cancelled.

The Team Messages dialog box (Figure 12) stores the last 10 team messages you broadcast. You can select any one of these messages to broadcast again. If you send more than 10 team messages, the oldest one drops off the stored list. You cannot designate any particular team message for permanent storage.

Figure 12. Team Message dialog box



**NOTE:** By default, the team message scrolls across Agent Desktop's team message pane. Individual agents can set their preference in Agent Desktop to view team messages as stationary. A stationary team message is more compatible with screen readers, which are often used by vision-impaired agents.

The Current Message pane displays the message that is currently being sent to your team.



***To send a team message to all agents on a team:***

1. From the team selection list, choose the team to which you want to send the message, and then click View > Team Messages or click the Team Messages button.
2. Type your message in the text box. The TM can be up to 255 characters long.
3. In the Expires at field, choose a specific time for the message to expire.  
By default, the message runs for 30 minutes.
4. Click Start or press Enter.

The team message is sent to the team for the length of time you chose. The text of the message you sent is logged in the current team performance message field.

***To cancel a team message:***

- In the Team Message dialog box, click Stop.

## Creating Supervisor Work Flows

---

Using the Supervisor Work Flow Administrator feature, you can configure your desktop to perform certain actions based on queue statistics for calls waiting and calls in queue for specified skill groups.

These work flows apply only to you, not to any other supervisors, and are available to you no matter where you log into Supervisor Desktop. They are tied to your login information.

**NOTE:** Supervisor work flow actions are available at the Premium feature level, except for the Tree Control action, which is also available at the Enhanced feature level.

In general, work flows consist of *events*, *thresholds*, and *actions*.

- The *event* that triggers an action is a skill group queue statistics update. Queue statistics are updated once every 5 seconds.
- The *thresholds* the event must meet is one or both of the following:
  - The number of calls waiting is below, within, or above specified limits
  - The oldest call in queue is below, within, or above specified time durations
- The *actions* triggered by meeting the thresholds can be:
  - Change the color of the skill group name in the tree control and/or add a message next to it
  - Highlight data in the tabular real time display
  - Display a popup message on your desktop
  - Play a \*.wav file on your desktop
  - Send an e-mail to selected recipients

For example, you can set up a work flow so that when there are more than 10 calls waiting in the queue for Skill Group 6500, the skill group name in the Skill Groups tree turns red and an audible warning sounds every 15 seconds.

### ***To set up a supervisor work flow:***

1. Choose Tools > Supervisor Work Flow Administrator.  
The Supervisor Work Flow List dialog box appears.
2. Click Add.  
The Add New Work Flow dialog box appears.
3. Enter a name for your new work flow, and then click OK.

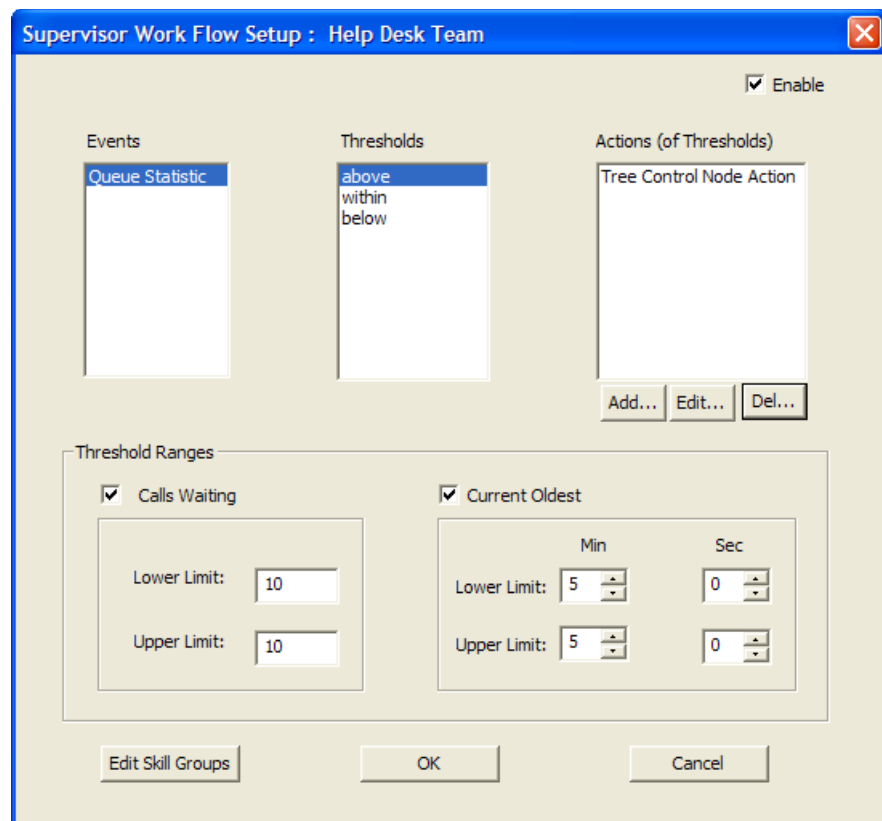
The Skill Group Selection dialog box appears.

4. Select the skill groups you want your work flow to apply to from the Available Skill Groups pane and use the arrows to move them to the Selected Skill Groups pane. Click OK when finished.

**NOTE:** A skill group might be a part of only one work flow per supervisor.

The Supervisor Work Flow Setup dialog box appears (Figure 13).

Figure 13. Supervisor Work Flow Setup dialog box



5. Set up the parameters for the work flow:
  - a. Specify the upper and lower limits for the Call Waiting and/or Current Oldest threshold.

**NOTE:** When you select both Calls Waiting and Current Oldest, the highest threshold crossed takes precedence.

- b. Select Above from the Thresholds pane.
  - c. Click Add. In the resulting Action Type Selection dialog box, select the action you want to be triggered when the Calls Waiting and/or Current Oldest statistic is above the upper limit you set, and then click OK. See ["Work Flow Actions" on page 64](#) for information on the types of actions available.
  - d. Repeat for the Within and Below thresholds.
6. When you have finished, click OK to enable the work flow.

### Example: Setting Up a Supervisor Work Flow

The following is a step-by-step illustration of setting up a supervisor work flow. This work flow:

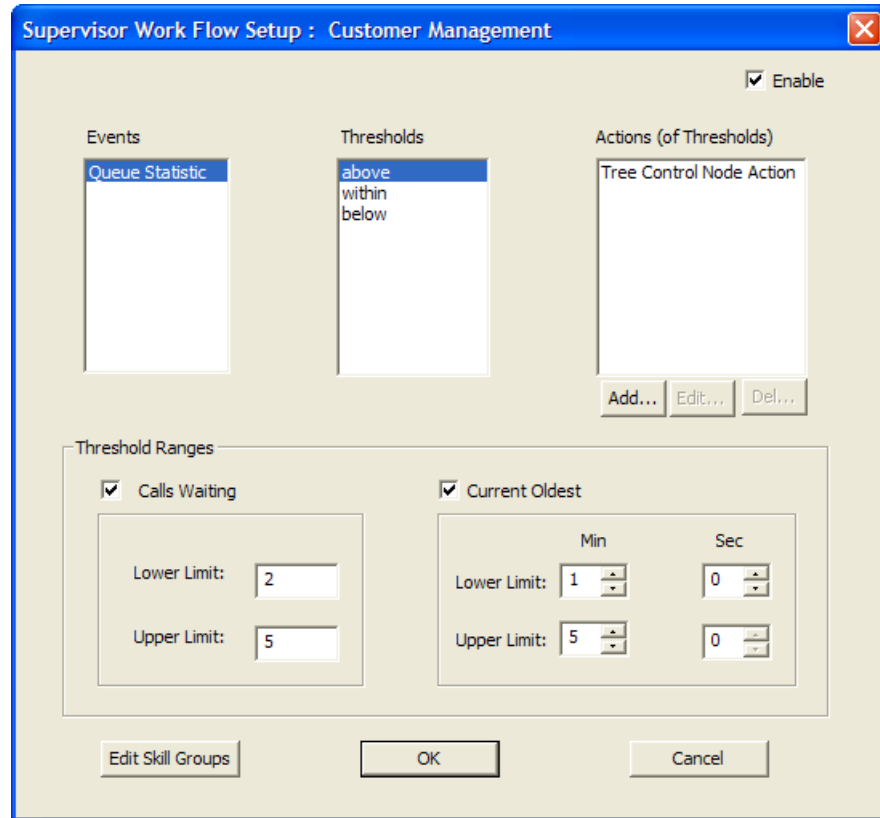
- Changes the skill group name color to green and displays “Below” next to it in the Skill Groups tree control when there are fewer than two calls waiting, or if the current oldest call is less than one minute old
- Changes the skill group name color to blue and displays “Caution” when there are 2 to 5 calls waiting, or if the current oldest call is between 1 and 5 minutes old
- Changes the skill group name color to red and displays “Warning” when there are more than five calls waiting, or if the current oldest call is more than 5 minutes old

#### *To set up the example supervisor work flow:*

1. Choose Tools > Supervisor Work Flow Administrator.  
The Supervisor Work Flow List dialog box appears.
2. Click Add.  
The Add New Work Flow dialog box appears.
3. Enter the name Customer Management, and then click OK.  
The Skill Group Selection dialog box appears.
4. Select the skill groups you want your work flow to apply to from the Available Skill Groups pane and use the arrows to move them to the Selected Skill Groups pane. Click OK when finished.  
The Supervisor Work Flow Setup dialog box appears.
5. Select the Calls Waiting check box and set the lower limit to 2 and the upper limit to 5 ([Figure 14](#)).

6. Select the Current Oldest check box and set the lower limit to 1 minute and the upper limit to 5 minutes (Figure 14).

Figure 14. Supervisor Work Flow Setup example

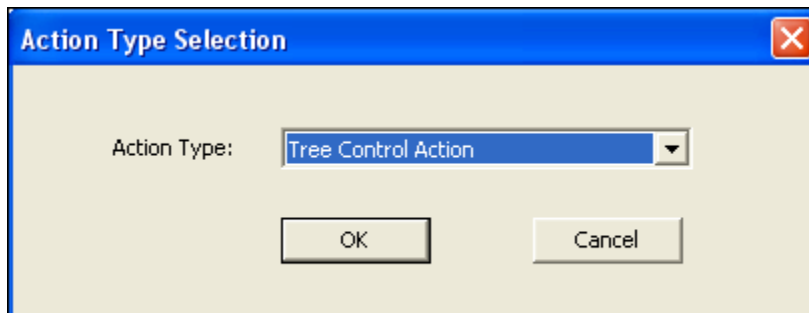


7. Select Below in the Thresholds pane and then click Add under the Actions pane.

The Action Type Selection dialog box appears.

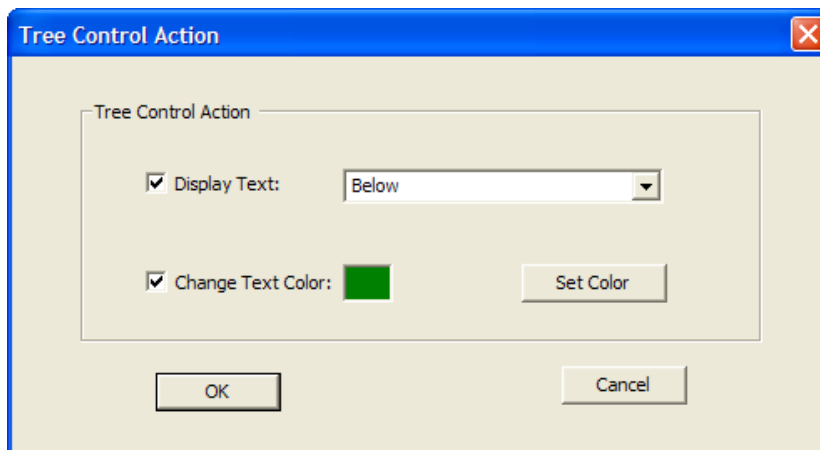
8. Select Tree Control Action and then click OK (Figure 15).

Figure 15. Action Type Selection dialog box



The Tree Control Action dialog box appears (Figure 16).

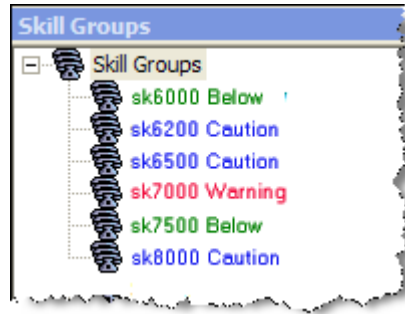
Figure 16. Tree Control Action dialog box



9. Check Display Text and enter Below in the field.
10. Check Change Text Color, click Set Color, choose green from the color palette displayed, and then click OK.
11. Repeat steps 7 through 10 for the Above and Within thresholds. For Above, select "Warning" as the display text and set the color to red. For Within, select "Caution" as the display text and set the color to blue.

When you are finished, click OK to enable the work flow. The skill group names will now be color-coded with text displayed (Figure 17).

Figure 17. Skill Group names color-coded



## Work Flow Actions

There are five possible work flow actions that can be triggered by threshold rules. These actions are:

- [Audible Alert Action \(page 64\)](#)
- [Message Box Action \(page 65\)](#)
- [Report Action \(page 66\)](#)
- [Tree Control Action \(page 67\)](#)
- [E-mail Alert Action \(page 67\)](#)

### Audible Alert Action

The Audible Alert action plays a \*.wav file on your desktop whenever the threshold rules are met. By default, the file plays once, but you can also configure it so that it plays repeatedly at specified intervals.

**NOTE:** You can turn off audible alerts that are configured to repeat at intervals by choosing Actions > Supervisor Work Flow – Audio Off from the menu.

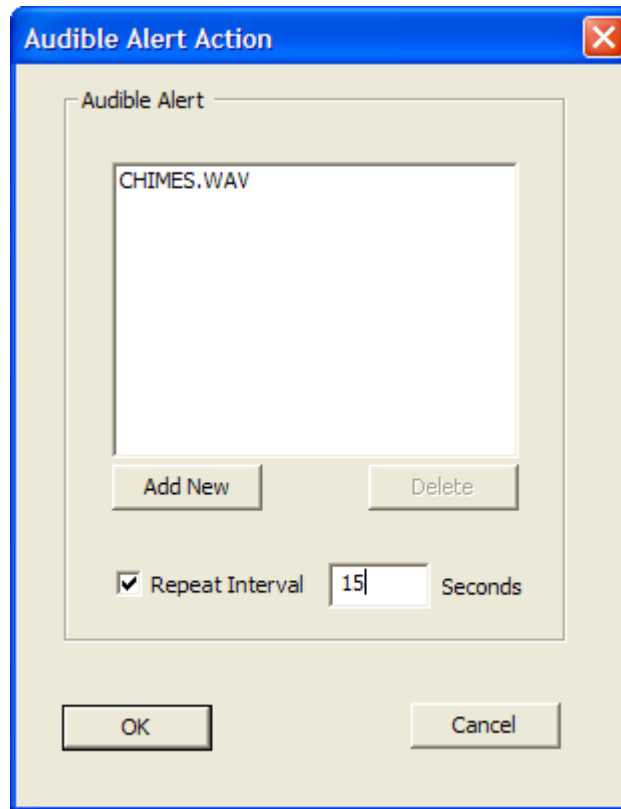
Your computer most likely has system \*.wav files available that are used to signal standard Windows events. These files are a good source of sounds.

**NOTE:** Any \*.wav file you select must be 50KB or smaller.



To set up an audible alert, in the Audible Alert Action dialog box (Figure 18) click Add New and then browse to the location of your selected \*.wav file. If desired, set up a repeat interval, and then click OK.

Figure 18. Audible Alert Action dialog box



### Message Box Action

The Message Box action pops a message box containing a customized message on your desktop whenever the threshold rules are met. The message box is closed by clicking OK.

To set up a message box, in the Message Box Action dialog box (Figure 19) type your message in the Message Text field, select the appropriate message icon, and then click **OK**.

Figure 19. Message Box Action dialog box



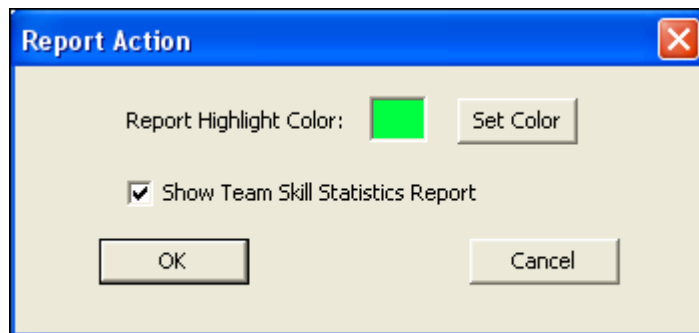
### Report Action

The Report action highlights in color cells in the CSQ and Oldest in Queue columns in the tabular Team Skill Statistics real time display when the data in the cell exceeds the threshold rules.

To set up a Report action, in the Report Action dialog box (Figure 20) click Set Color to select the color to use for highlighting the display cells, and then click **OK**.

If you select the Show Team Skill Statistics Report check box, then whenever a statistic changes that triggers a Report action, Supervisor Desktop automatically changes its focus to display the Team Skill Statistics report so that you will see the current report with the cells highlighted.

Figure 20. Report Action dialog box

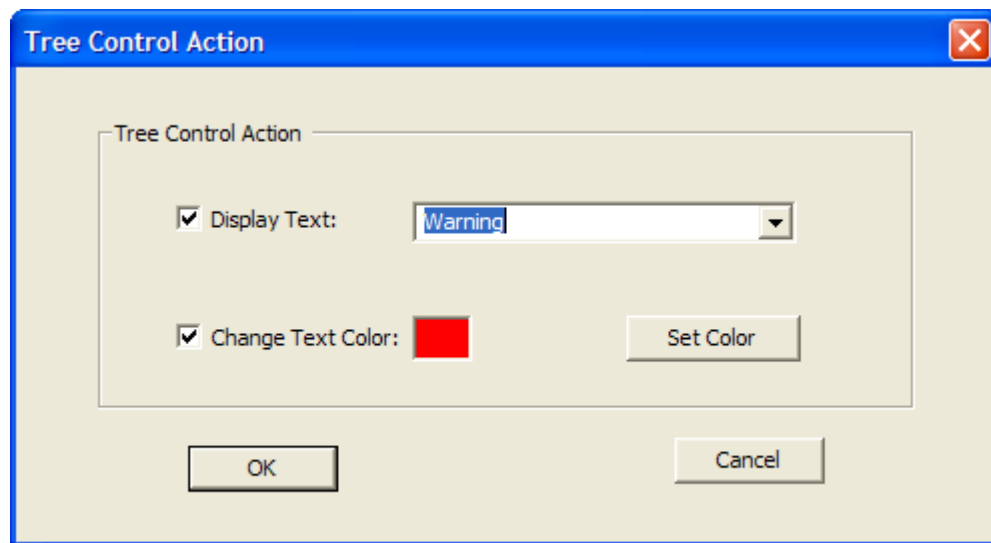


### Tree Control Action

The Tree Control action enables you to select a color to apply to a CSQ name and/or a message to display beside the CSQ name in the Skill Groups tree control whenever the threshold rules are met.

To set up a Tree Control action, in the Tree Control Action dialog box (Figure 21) check the effect(s) you want applied to the CSQ name. Click Set Color to select a text color, enter your own message or select from the drop-down list a predefined message (Caution or Warning) to appear next to the CSQ name, and then click OK.

Figure 21. Tree Control Action dialog box



### E-mail Alert Action

The E-mail Alert action enables you to send an e-mail to specified people whenever the threshold rules are not met.

The e-mail messages have predefined subject lines, depending on what threshold rule is met. They are:

- Skill: <CSQ name>, Number of Calls Waiting is above upper limit
- Skill: <CSQ name>, Number of Calls Waiting is below lower limit
- Skill: <CSQ name>, Number of Calls Waiting is within upper and lower limits
- Skill: <CSQ name>, Oldest Call in Queue is above upper limit
- Skill: <CSQ name>, Oldest Call in Queue is below lower limit
- Skill: <CSQ name>, Oldest Call in Queue is within upper and lower limits

The e-mail messages sent can consist only of the Subject line; a message in the body of the e-mail is optional.

**Figure 22. E-mail Alert Action Setup dialog box**

To set up an e-mail alert action, complete the E-mail Alert Action Setup dialog box (Figure 22) as listed in Table 19.

**Table 19. E-mail Alert Action Setup dialog box fields**

Field	Description
From:	Required. Enter your e-mail address. The first time this dialog box is displayed the field is blank; thereafter it is automatically filled with what you previously entered.
To:	Required. Enter the e-mail addresses of the recipients, separated by a semicolon. The first time this dialog is displayed the field is blank; thereafter it is automatically filled with what you previously entered.
Mail Server:	Required. The SMTP IP address or host name of the e-mail server used to send the e-mail. The first time this dialog is displayed the field is blank; thereafter it is automatically filled with what you previously entered.
BCC:	Optional. Enter the e-mail addresses of the recipients you want copied in on the e-mail message. The first time this dialog is displayed the field is blank; thereafter it is automatically filled with what you previously entered.

**Table 19. E-mail Alert Action Setup dialog box fields (cont'd)**

Field	Description
Subject:	The subject line is automatically generated by the action.
High Priority	Select the check box if you want the e-mail to be delivered with high priority. Leave it unselected for normal e-mail delivery.
Message Pane (not labeled)	Optional. Enter a message to appear in the body of the e-mail.

Use the Send button to check if the e-mail alert action is configured correctly. When you click Send, a test e-mail is sent to the e-mail addresses in the To and BCC fields.

If the test e-mail is successful, “Mail Sent Successfully” appears in the field next to the test button. If it is unsuccessful, “Mail Send Failed” appears. In that event, check your entries in the To, BCC, and Mail Server fields for accuracy and test it again.

## Using Supervisor Record Viewer

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The Supervisor Record Viewer ([Figure 23](#)) displays all recordings made by your team over the last seven days as well as those you tag for 30-day extended lifetime.

**NOTE:** A license is used whenever a playback is in progress and released when the playback ends. If no licenses are available when you attempt to play back a recording, this error message is displayed: “A licensing error has occurred. Please try again in five minutes. If the problem persists, please see your log file or System Administrator for details.” You must wait until a license is released and available in order to review any recordings.

**NOTE:** In a High Availability system, recordings can be stored on either of the two recording servers, and all are displayed in Supervisor Record Viewer. If one of the servers becomes inactive and cannot be accessed, the recordings stored on that server cannot be played, even though they continue to be displayed in Supervisor Record Viewer. If you attempt to play a recording stored on an inactive server, you will see the error message, “The recording server is inactive.” You will be able to play the recording when the server becomes active again.

The recordings are archived as raw voice data packets; they can only be played back using the Supervisor Record Viewer. However, if you want to save selected recordings as \*.wav files, you can use the “Play and Save” button and save the recording to a folder in \*.wav format.

Unless recordings are tagged for an extended lifetime, they are automatically deleted after seven days.

If a recording is tagged for the 30-day extended lifetime, they will not be deleted until that 30-day period expires. If you delete them manually before the 30-day period expires, they are deleted in the next folder cleanup—cleanups run daily at midnight.

Figure 23. Supervisor Record Viewer

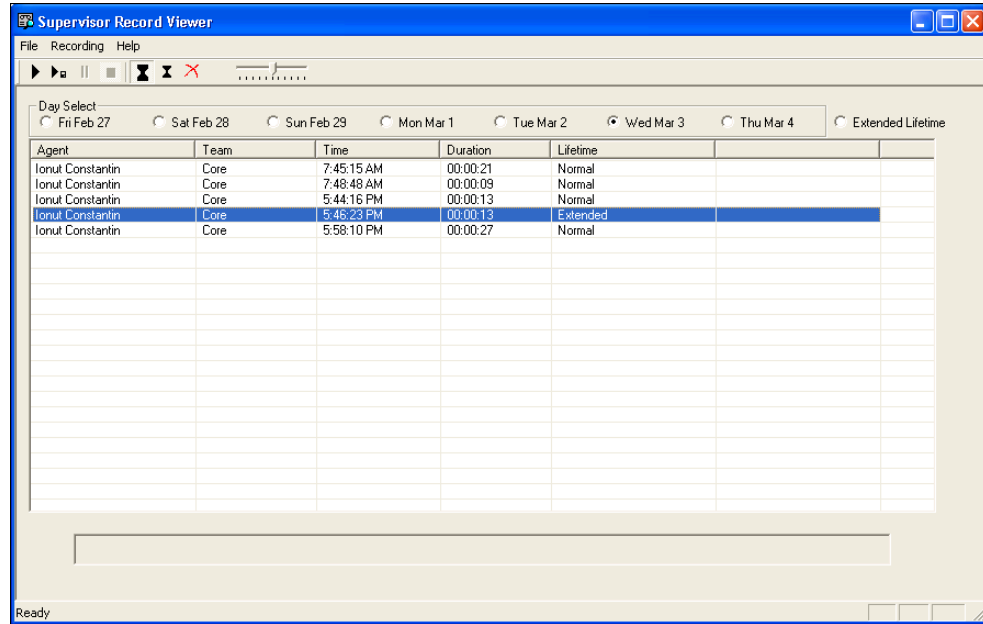
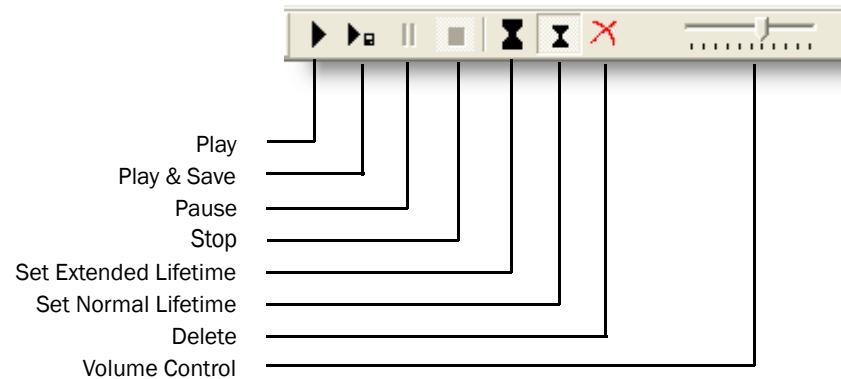


Figure 24. Supervisor Record Viewer toolbar



The Supervisor Record Viewer ([Figure 24](#)) displays the information as listed in [Table 20](#)

**Table 20. Supervisor Record Viewer fields**

Column Name	Description
Agent	The agent whose call is recorded.
Team	The team to which the agent belongs.
Time	The time the recording was made.
Duration	The length of the recording in hh:mm:ss format.
Lifetime	The length of time the recording is archived: Normal is 7 days, Extended is 30 days.
Date Recorded	(Appears only when “Extended Lifetime” is selected in Day Select) The date the recording was made.

***To start Supervisor Record Viewer:***

1. From the Supervisor Desktop menu bar, choose Tools > Recorded Files. Supervisor Record Viewer starts with no day selected.
2. From the Day Select section, click one of the option buttons to view the recordings made by your team on that date.



**To listen to a recording:**

1. From the Day Select section of Supervisor Record Viewer, click the option button for the date of the recording you want to review.

You can also click the Extended Lifetime option button to view a list of all recordings that have been tagged for extended 30-day archiving.

2. Select the recording you want to review.
3. Click the Play button, or choose Recording > Play from the menu bar.

Use the Pause or Stop buttons to control the recording playback, and the volume slider to control the playback volume.

There is a progress bar at the bottom of the screen that shows where you are within the recording. You can click the progress bar and drag it backwards or forwards to rewind or fast forward the recording. You must click Play again after you reposition the progress bar to restart the playback.

**NOTE:** You cannot play back a recording while you are monitoring a call.

**To save a recording:**

1. Select the recording you want to save.
2. Click the Play and Save button, or choose Recording > Play and Save from the menu bar. The Save As dialog box appears.
3. Select the folder where the recording is to be saved, enter a file name for the recording, and then click Save. The recording plays and simultaneously is saved as a \*.wav file to the location you selected.

**To tag a recording for extended archiving:**

1. Select the recording you want to archive for 30 days.
2. Click the Set Extended Lifetime button, or choose File > Set Extended Lifetime from the menu bar. The recording is tagged to be archived for 30 days from the date of recording.

## Service Autorecovery

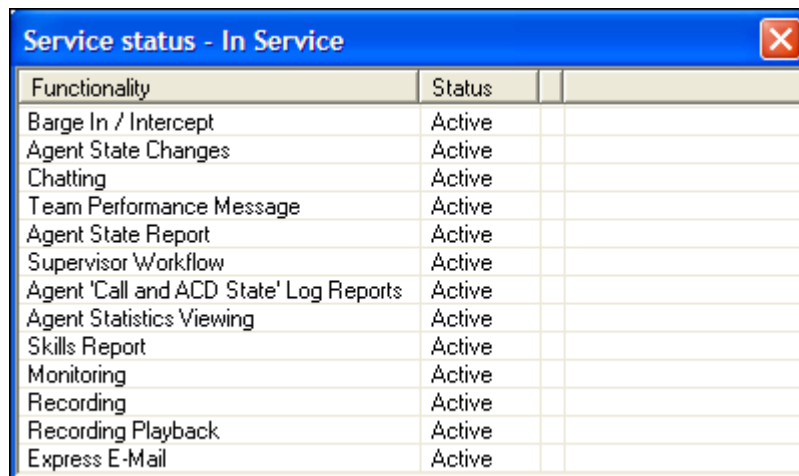
The service autorecovery feature allows Supervisor Desktop to automatically recover its connection to the Cisco services in the event of a service restart or a network outage.

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

To learn more about what is affected by the service failure, double-click the status message on the status bar. Supervisor Desktop displays a popup box (Figure 25) that lists features and indicates if that feature is available or not due to the service outage.

Figure 25. Service Status popup window



Functionality	Status
Barge In / Intercept	Active
Agent State Changes	Active
Chatting	Active
Team Performance Message	Active
Agent State Report	Active
Supervisor Workflow	Active
Agent 'Call and ACD State' Log Reports	Active
Agent Statistics Viewing	Active
Skills Report	Active
Monitoring	Active
Recording	Active
Recording Playback	Active
Express E-Mail	Active

The agent must drop any call he or she is on in order for the phone to reconnect to the network. If the agent continues on a call, CAD will not be able to show the call's actual length because it shows as “terminated” in the system.

When the phone comes back into service, the agent will see the popup window display a message that the phone is in service. The agent can then change the agent state back to Ready and resume taking calls.

## Phone Network Failure

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

The supervisor will see the change of agent state in the Agent ACD State Log report, along with the "Device out of service" reason code (code 32759).

The agent must drop any call he or she is on in order for the phone to reconnect to the network. If the agent continues on a call, CAD will not be able to show the call's actual length because it shows as "terminated" in the system.

When the phone comes back into service, the agent will see the popup window display a message that the phone is in service. The agent can then change the agent state back to Ready and resume taking calls.



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