



## **Cisco Desktop Administrator User Guide**

CAD 6.6 for Cisco Unified Contact Center Express Release 7.0  
Cisco Unified Communications Manager Edition  
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# Preface

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## Introduction

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Cisco Desktop Administrator consists of two parts:

- Desktop-based Cisco Desktop Work Flow Administrator
- Web-based Cisco Desktop Administrator

Cisco Desktop Work Flow Administrator enables you to configure the following:

- Dial strings
- Phone books
- Reason codes
- Wrap-up data
- Record/monitor notification
- Work flow groups

Cisco Desktop Administrator enables you to configure the following:

- Enterprise Data
- Personnel
- Cisco Unified Presence Settings
- Agent E-Mail Settings

**NOTE:** Desktop Work Flow Administrator is not supported if installed on a virtual private network (VPN) desktop.

## What's New In This Release

- Web-based Cisco Desktop Administrator
- Agent E-Mail integration
- Cisco Unified Presence integration
- Support for Cisco Agent Desktop—Browser Edition
- Support for multiple browser tabs in Cisco Supervisor Desktop and Cisco Agent Desktop

## Cisco Desktop Administrator Feature Levels

There are three versions of Cisco Desktop Administrator: Standard, Enhanced, and Premium. The following chart outlines the features available in each version. All features not listed here are present in all three versions.

Feature	Standard	Enhanced	Premium
Configure CAD interface		x	x
Configure work flows		x	x
Configure server and desktop monitoring		x	x
Wrap-up data		x	x
Agent E-Mail			x
Cisco Unified Presence		x	x
Cisco Unified CCX Outbound Dialer		x	x

## Related Documentation

The following documents contain additional information about CAD 6.6:

- *Cisco CAD Installation Guide*
- *Cisco Agent Desktop User Guide*
- *Cisco Agent Desktop—Browser Edition User Guide*
- *Cisco Supervisor Desktop User Guide*
- *Cisco IP Phone Agent User Guide*
- *Cisco CAD Troubleshooting Guide*
- *Cisco CAD Error Code Dictionary*
- *Integrating CAD with Citrix Presentation Server or Microsoft Terminal Services*
- *Configuring and Troubleshooting VoIP Monitoring*

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# Getting Started with Cisco Desktop Work Flow Administrator

# 1

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## Introduction

Cisco Desktop Work Flow Administrator comes with one license, so only one person can view and/or edit data in it at any one time. More than one instance of Desktop Work Flow Administrator can be open concurrently.

If someone is using Desktop Work Flow Administrator when you try to access it, an error message appears that identifies the IP address of the other user's computer.

For this reason, it is important that you close Desktop Work Flow Administrator completely when you are done using it. As long as the application is running, a license is being used and others are blocked from accessing it.

## **Starting Desktop Work Flow Administrator**

***To start Desktop Work Flow Administrator:***

1. Click Start > Programs > Cisco > Desktop > Admin. Desktop Work Flow Administrator starts.
2. Click the Call Center 1 node to expand the navigation tree. By default, Desktop Work Flow Administrator is not password-protected and the tree will expand. If a password has been configured, you are asked to enter it now.

For more information about passwords, see ["Passwords" on page 19](#).

## Automated Updates

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Every time you start Desktop Work Flow Administrator, the application 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 condition exists, the application automatically runs the update process.

**NOTE:** For automated updates to function correctly, Internet Explorer must be configured so that it checks for newer versions of stored pages. In Internet Explorer, choose Tools > Internet Options and select the General tab. In the Temporary Internet Files section, click Settings and ensure that any option other than Never is selected.

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

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

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

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

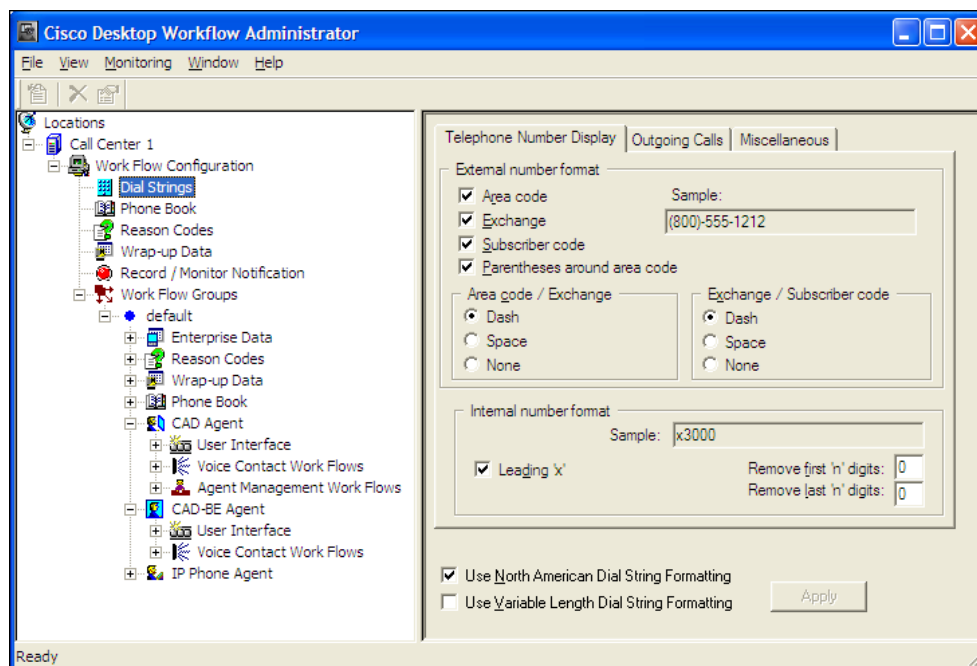
**NOTE:** Because Agent Desktop is automatically installed when Supervisor Desktop is installed, only Supervisor Desktop will be listed as having been updated in the final dialog box. Agent Desktop will be listed only if Supervisor Desktop is not present on your PC.

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

## The Desktop Work Flow Administrator Interface

The Desktop Work Flow Administrator interface has two panes. The left pane is a navigation tree similar to that found in Windows Explorer. The right pane displays the application that you choose in the left pane.

**Figure 1.** Desktop Work Flow Administrator interface



### Toolbar

When you select a node on the navigation tree, the Desktop Work Flow Administrator menu bar and toolbar change to reflect the design of that node's application.

The toolbar buttons you see are among those listed in [Table 1](#).

**Table 1.** Desktop Work Flow Administrator toolbar buttons






Button	Name	Description
	About	Displays copyright and version information
	Delete	Removes the selected work flow group
	Help	Accesses Help files



Table 1. Desktop Work Flow Administrator toolbar buttons — *Continued*

Button	Name	Description
	New	Adds a new work flow group
	Web	Opens your web browser and accesses Cisco's website

## Navigation Tree Pane

Use these mouse or keyboard actions in the left pane to navigate the tree.

### Mouse

- Double-click an icon/application name to expand or collapse the tree.
- Click the plus sign ( + ) to expand the tree.
- Click the minus sign ( - ) to collapse the tree.
- Right-click to rename or delete a node (not available for all nodes).

### Keyboard

With a node selected,

- Press the up and down arrow keys to move from one node to the next.
- Press the left arrow key to collapse the tree.
- Press the right arrow key to expand the tree.

## Display Pane Navigation

The applications displayed in the right pane are designed to use shortcut keys and the tab key as alternatives to using the mouse to navigate around a window. The shortcut keys that apply to a specific node are discussed in the section devoted to that node's functions.

## **User Privileges in Windows XP and Vista**

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Because Desktop Work Flow Administrator users must be able to update registry settings, they must have Administrator or Power User privileges on Windows XP and Vista platforms.

Only a person with Administrator privileges can change user privileges on the Administrator PC if it is necessary to upgrade them.

## Passwords

You can use a password to protect both Desktop Work Flow Administrator and Desktop Administrator. If you set a password in either application, that password applies to both applications.

If you do not want Desktop Work Flow Administrator to be password-protected, you must not configure a password in Desktop Administrator.

For information on configuring passwords in Desktop Administrator, see ["Configuring a Password in Desktop Administrator" on page 146](#).

### Configuring a Password in Desktop Work Flow Administrator

A password is optional for Desktop Work Flow Administrator. If a password is configured, when you select the logical contact center node you will be prompted to provide the password before you can access any of the subnodes.

**NOTE:** Any password you set in Desktop Work Flow Administrator is also the password for Desktop Administrator.

### Setting Up a Password

*To set up a password:*

1. In the navigation pane, select the Call Center 1 node.
2. From the menu bar, choose Setup > Change Password.

The Administrator Password dialog box appears ([Figure 2](#)).

**Figure 2.** Administrator Password dialog box



The image shows a Windows-style dialog box titled "Administrator Password". It has a blue title bar with a red close button in the top right corner. The dialog box contains three text input fields labeled "Old password:", "New password:", and "Confirm new password:". Below these fields are three buttons: "OK", "Cancel", and "Help".

3. Leave the Old Password field blank, and enter a new password, type it again to confirm it, and then click OK.

Passwords are case sensitive and can consist of up to a maximum of 32 alphanumeric characters.

Desktop Work Flow Administrator is now password protected. You must restart the application for the change to go into effect.

## Changing a Password

### *To change your password:*

1. In the left pane, select the Call Center 1 node
2. From the menu bar, choose Setup > Change Password. The Change Password dialog box appears.
3. Enter your old password, a new password, and your new password again to confirm it, and then click OK.

The password is now changed. You must restart Desktop Work Flow Administrator for the change to go into effect.

## Deleting a Password

### *To remove password protection:*

When you remove the password from Desktop Work Flow Administrator, you automatically reset the password in Desktop Administrator to the default value, which is blank.

1. In the left pane, select the Call Center 1 node
2. From the menu bar, choose Setup > Change Password. The Change Password dialog box appears.
3. Enter your old password, leave the New password and Confirm password fields blank, and then click OK.
4. You are asked to confirm that you want to leave Desktop Work Flow Administrator unprotected. Click Yes. The password is removed. You must restart the application for the change to go into effect.

## Restoring the Default Password

The Reset Administrator Password option can be used In the event you forget a password you set up. This option resets the password back to its default value (blank) without requiring that you know the previous password.

This menu option is available only in CAD Configuration Setup located on the Unified CCX server.

***To restore the default password:***

1. On the Unified CCX server, navigate to the C:\Program Files\Cisco\Desktop\bin folder.
2. Double-click postinstall.exe to launch CAD Configuration Setup.
3. Choose File > Reset Administrator Password. The utility runs and resets the password to blank.

## **Client Applications**

User IDs and passwords are administered in Unified CM for the following applications:

- Cisco Agent Desktop
- Cisco Agent Desktop—Browser Edition
- Cisco Supervisor Desktop
- Cisco IP Phone Agent

The user's password is verified on the CTI server when a user starts the application.

## CAD Configuration Setup Utility

You can use the CAD Configuration Setup utility to:

- Configure the CAD services
- Reset the Administrator password
- Reset the client install files

### Overview

CAD Configuration Setup runs initially as part of the CAD installation process when the Unified CCX system is installed. After initial installation, you can change your configuration settings by launching it from Desktop Administrator or running PostInstall.exe (located in the ...\\Program Files\\Cisco\\Desktop\\bin folder on each CAD computer).

CAD Configuration Setup displays different step windows, depending on which host computer it runs on. [Table 2](#) shows which step windows appear when CAD Configuration Setup is run on a specific host computer. Refer to this table to determine where you should run Configuration Setup to change the desired configuration setting.

**NOTE:** If you run CAD Configuration Setup on a computer that hosts only Desktop Work Flow Administrator, and no other CAD application or service, you will receive a message that there is nothing to configure on that computer. Run CAD Configuration Setup on another computer that hosts CAD services or applications.

**Table 2.** CAD Configuration Setup windows displayed per host computer

Step Name	Base *	VoIP	Rec	CAD CSD	CWA
<a href="#">CAD-BE Servers Step (page 25)</a>	×				
<a href="#">VoIP Monitor Service Step (page 26)</a>		×		×	
<a href="#">Services Configuration Step (page 27)</a>	×	×	×		
<a href="#">Terminal Services Step (page 28)</a>				×	
<a href="#">SNMP Configuration Step (page 29)</a>	×	×	×		

\* Header key: Base—Base services; VoIP—VoIP Monitor service; Rec—Recording service; CAD CSD—Cisco Agent Desktop, Cisco Supervisor Desktop—CWA: Cisco Work Flow Administrator

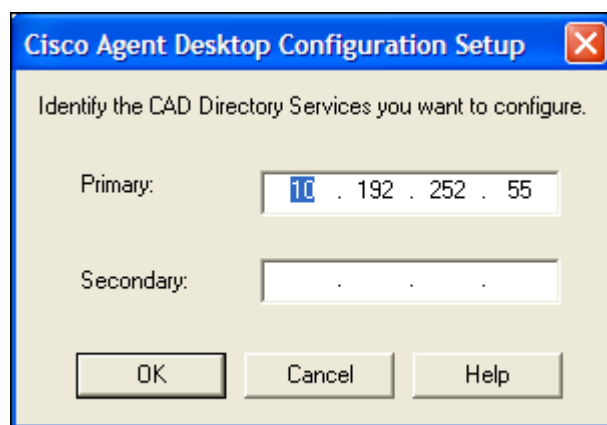
## Modifying Configuration Data

### *To modify configuration data:*

1. Start CAD Configuration Setup.
  - In Desktop Work Flow Administrator, select the Call Center 1 node in the left pane and then choose Setup > Configure Systems from the menu bar.
  - On another CAD host computer, navigate to the C:\Program Files\Cisco\Desktop\bin folder and double-click PostInstall.exe.

Configuration Setup starts and displays the CAD Directory Services dialog box.

Figure 3. CAD Directory Services dialog box



2. Ensure that the correct primary (and optional secondary) Directory Services IP addresses are entered, and then click OK.

The Cisco Agent Desktop Configuration Setup utility is displayed, with the Unified CM node selected.

**NOTE:** You can press F6 to switch between the left and right pane, and the up and down arrows to move up and down the navigation tree in the left pane.

3. Select the step window you want to modify from the left pane, enter the new data in the right pane, and then click Apply.
  - You can display the step windows in any order you wish.
  - If you modify something in a step window, you must click Apply to save your changes before you move on to another window.
4. When you are done making your changes, choose File > Exit from the menu or click Close.

CAD Configuration Setup closes.

5. Stop and restart the modified service and all desktops for the change to go into effect.

## Resetting the Administrator Password

Use the Reset Administrator Password option on the File menu to set the Desktop Work Flow Administrator/Desktop Administrator password back to the default. See ["Restoring the Default Password" on page 20](#) for more details.

## Resetting Client Installation Files

Use the Reset Client Install option on the File menu to recreate the client application installation files that are downloaded from the Unified CCX server. This process might become necessary if, for example, the IP address of the VoIP service is changed.

This option is available only in CAD Configuration Setup located on the Unified CCX server.

### *To reset the client installation files:*

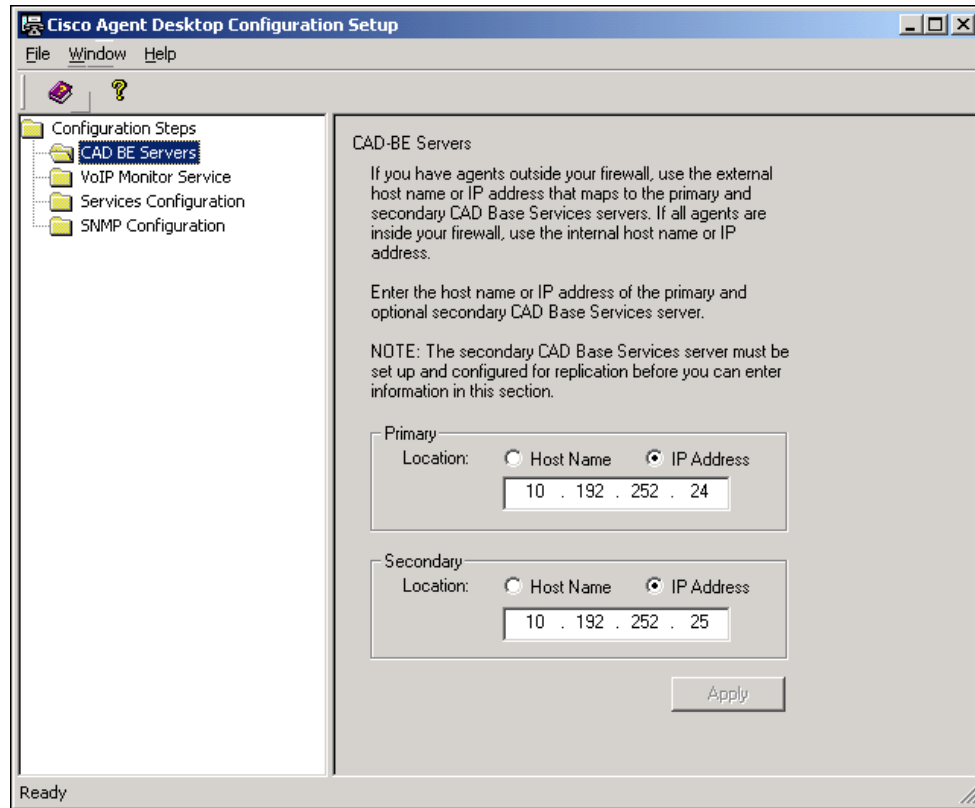
1. On the Unified CCX server, navigate to the C:\Program Files\Cisco\Desktop\bin folder.
2. Double-click postinstall.exe to launch CAD Configuration Setup.
3. Choose File > Reset Client Installs. The following MSI files are recreated:
  - Cisco Desktop Administrator.msi
  - Cisco Supervisor Desktop.msi
  - Cisco Agent Desktop.msi



## ConfigurationSetup Step Windows

### CAD-BE Servers Step

Figure 4. CAD-BE Servers step window



The CAD-BE Servers step window appears only in update mode.

Enter the host name or IP address of the CAD Base Services server in the Primary Location field. Apache Tomcat, which is required to run CAD-BE, is installed on this server.

If some of your agents are outside the firewall, use the external hostname/IP address that maps to the server. If all your agents are inside the firewall, use the internal hostname/IP address.

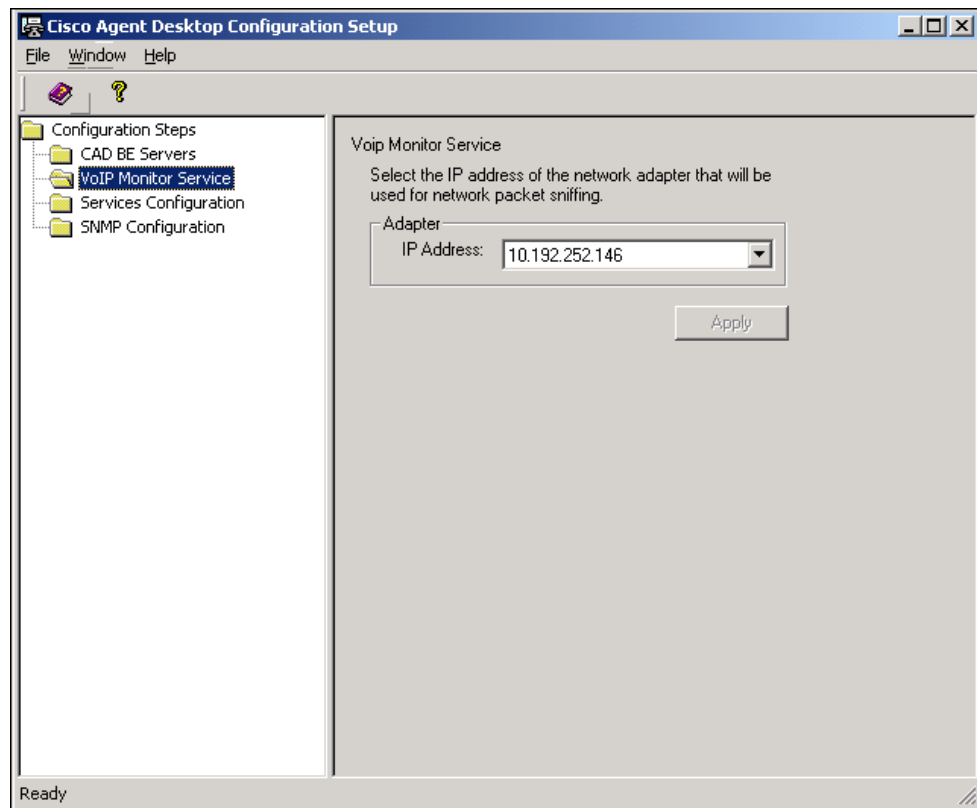
If your configuration includes a second server that hosts the CAD Base Services and you have configured replication between the primary and secondary servers, enter the location of the second server in the Secondary Location field.

**NOTE:** If you establish replication in initial mode, the Secondary Location field is filled automatically.

The Secondary Location field is not enabled until you configure the second CAD Base Services server and establish replication.

### VoIP Monitor Service Step

Figure 5. VoIP Monitor Service step window



Select the IP address of the network adaptor to which voice packets are sent to be sniffed by the VoIP Monitor service (if this is a server box) or the desktop monitor (if this is a client desktop).

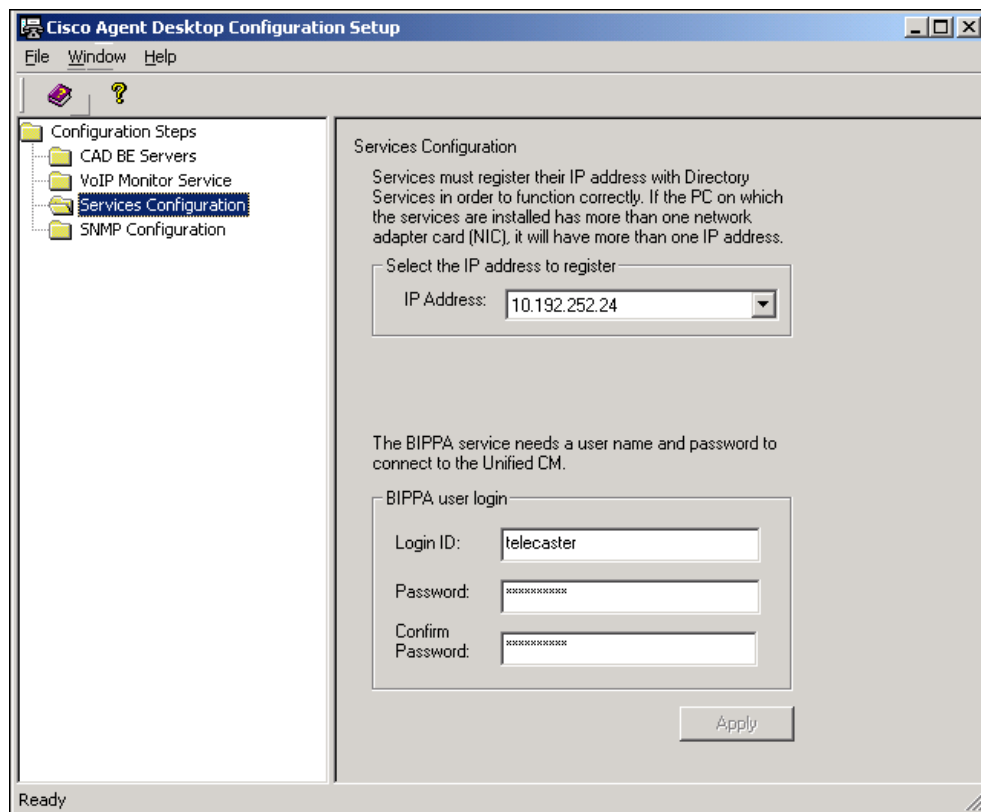
- On a VoIP Monitor Service server, it is the IP address of the NIC that is connected to the port configured for SPAN.
- On a client desktop computer, it is the IP address of the NIC on which the computer is daisy-chained to the phone.

**NOTE:** If you change these settings after initial setup, you must restart the VoIP Monitor service or the client application (depending

on where you run CAD Configuration Setup) to ensure that the change is registered with them properly.

## Services Configuration Step

Figure 6. Services Configuration step window



If the computer has more than one IP address, select the IP address of the NIC used to connect to the LAN—it must be accessible by the client desktops.

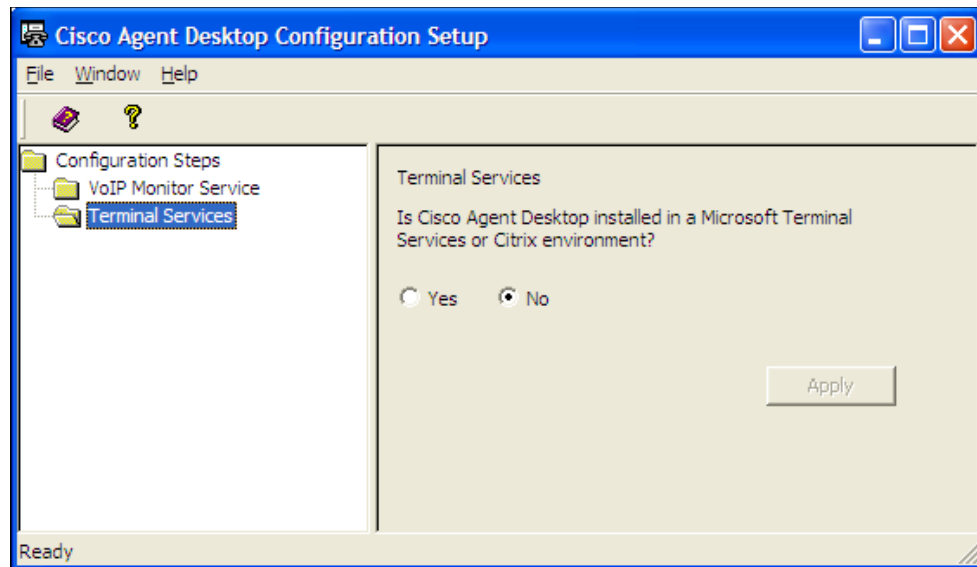
In order to connect to the Unified CM, the Browser and IP Phone Agent (BIPPA) service must have a user ID and password. This user ID and password are also set up in Unified CM (see “Configuring IP Phones for Cisco IP Phone Agent” in the *Cisco CAD Installation Guide*). You can complete these fields before actually setting up the user in Unified CM, but the user ID and password must be identical in both places. If they are changed in this window or in Unified CM, they must be changed in both.

**NOTE:** If Directory Services is not running when you view this step, the IPPA login information cannot be changed.

**NOTE:** If you change these settings, you must restart all CAD services to ensure that the change is registered with them properly.

## Terminal Services Step

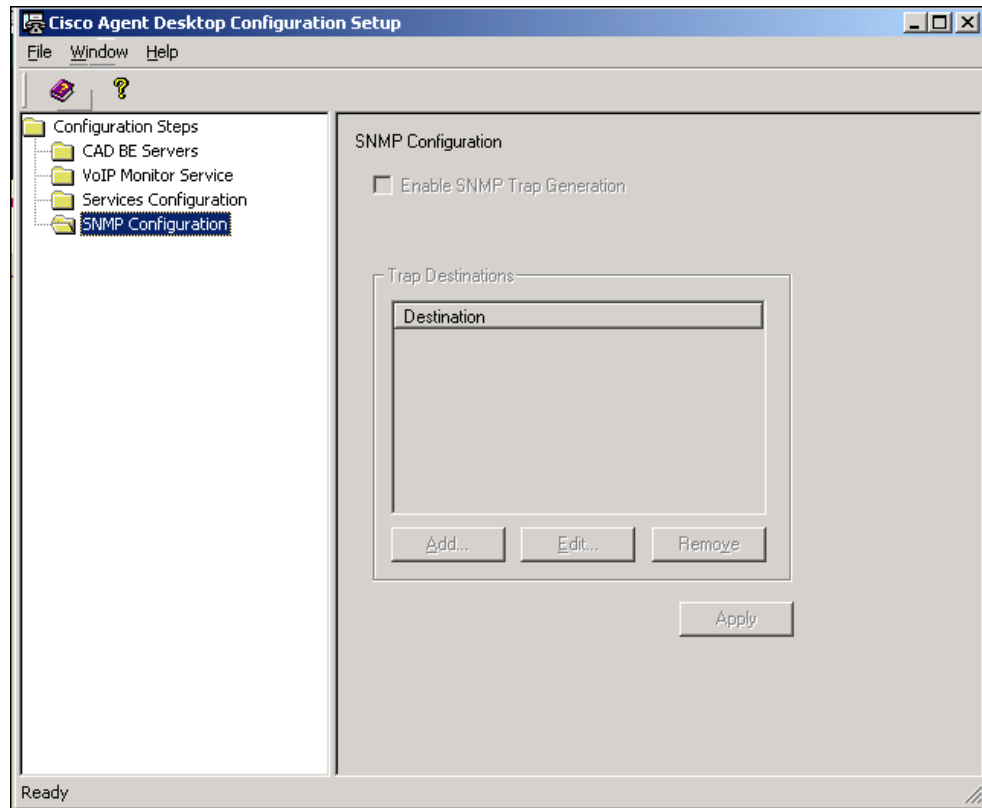
Figure 7. Terminal Services step window



If this installation of Cisco Agent Desktop is installed in a Microsoft Terminal Services or Citrix environment, click Yes. If not, click No.

## SNMP Configuration Step

Figure 8. SNMP Configuration step window



The SNMP Configuration step window appears only during update mode if the Microsoft Simple Network Management Protocol (SNMP) service is installed on the CAD Base services server.

If you select the Enable SNMP Trap Generation check box, INFO and higher error messages are sent from the CAD services server to the IP addresses configured in the Destination pane. Use the Add, Edit, and Remove buttons to manage the list of destination IP addresses.

The SNMP service can be installed using the Add/Remove Windows Components button in the Add or Remove Programs utility in Control Panel. Select Management and Monitoring Tools from the list of available components, and then choose Simple Network Management Protocol.

SNMP allows you to monitor and manage a network from a single workstation or several workstations, called SNMP managers. SNMP is actually a family of specifications that provide a means for collecting network management data from the

devices residing in a network. It also provides a method for those devices to report any problems they are experiencing to the management station.

For more information on using this tool, see Microsoft SNMP documentation.

## Synchronizing Directory Services

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The Directory Services database should be synchronized with the master Unified CCX agent database. The databases are synced automatically whenever the master Unified CCX database changes. However, you can manually sync them with the Synchronize Directory Services command.

**NOTE:** You can synchronize Directory Services manually from the Desktop Administrator web application also. See ["Synchronizing Directory Services" on page 163](#) for more information.

***To synchronize the databases manually:***

1. In the left pane, select the Call Center 1 node.
2. From the menu, choose Setup > Synchronize Directory Services.

When the synchronization is complete, the system displays a confirmation message that Directory Services was successfully synchronized.





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## Introduction

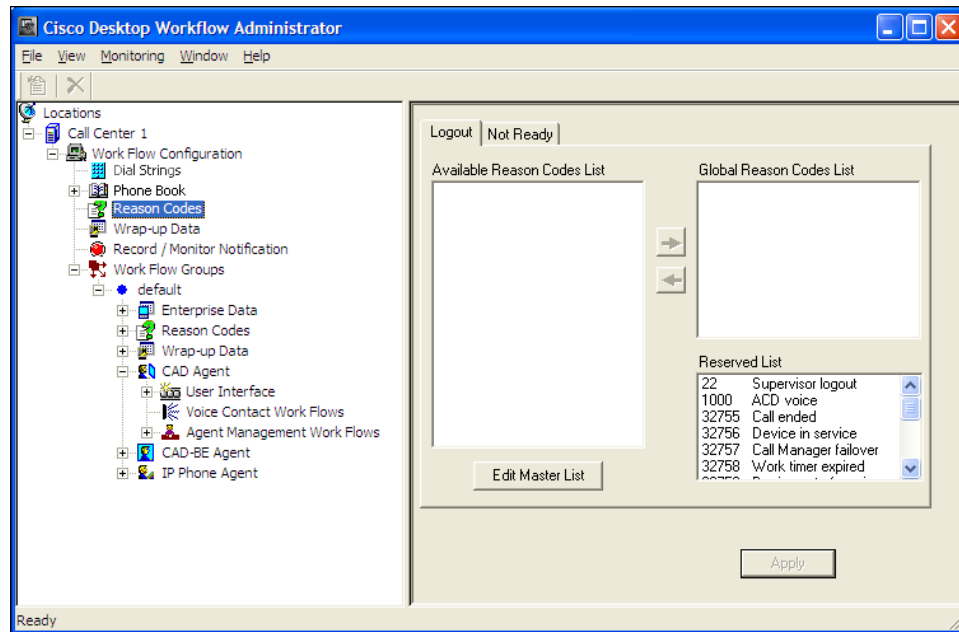
Work Flow Configuration enables you to configure and maintain the appearance and behavior of Agent Desktop, Agent Desktop—Browser Edition, and IP Phone Agent. Work Flow Configuration has the following functions:

- [Dial Strings \(page 35\)](#)
- [Phone Book \(page 46\)](#)
- [Reason Codes \(page 53\)](#)
- [Monitor/Record Notification \(page 63\)](#)
- [Work Flow Groups \(page 64\)](#)

To use any Work Flow Configuration application, select its node in the left navigation pane of the Desktop Work Flow Administration window ([Figure 9](#)). The right display pane shows the selected node.

The CAD client applications must be restarted for any configuration changes you make to go into effect.

**Figure 9.** Work Flow Configuration window, Reason Codes node selected



**NOTE:** When configuring the name or ID of objects (examples are work groups, work flows, agent login names, server names, and macro names), do not use the “=” character. This can cause problems when backing up and restoring data.

## Dial Strings

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Use the Dial Strings option to configure the way desktop applications display and dial phone numbers.

**NOTE:** Dial strings for CAD-BE are not configurable.

Select the appropriate check box at the bottom of the Dial Strings pane to choose the dial string format you will use. The available formats are:

- North American Dial String format
- Variable Format Dial String format

Different tabs display depending on your choice.

### North American Dial String Format

If you choose the North American dial string format, the following three tabs are active:

- [Telephone Number Display Tab \(page 36\)](#)
- [Outgoing Calls Tab \(page 37\)](#)
- [Miscellaneous Tab \(page 41\)](#)

## Telephone Number Display Tab

The Telephone Number Display tab (Figure 10) enables you to configure how phone numbers are displayed in Agent Desktop.

**Figure 10. Telephone Number Display tab**

Telephone Number Display | Outgoing Calls | Miscellaneous

External number format

☒ Area code      Sample: (800)-555-1212

☒ Exchange

☒ Subscriber code

☒ Parentheses around area code

Area code / Exchange

☒ Dash

☐ Space

☐ None

Exchange / Subscriber code

☒ Dash

☐ Space

☐ None

Internal number format

☒ Leading 'x'      Sample: x3000

Remove first 'n' digits: 0

Remove last 'n' digits: 0

☒ Use North American Dial String Formatting

☐ Use Variable Length Dial String Formatting

Apply      Help

The selections you make are reflected in the Sample fields. (An exception is if you enter a value in either of the “Remove first ‘n’ digits” and “Remove last ‘n’ digits” fields. In that case, the sample does not change.)

**Table 3. Telephone Number Display tab fields**

Tab Section	Description
External number format	Specify the calling number and called number phone numbers format
Area code/Exchange	Specify the separator between the area code and exchange
Exchange/Subscriber code	Specify the separator between the exchange and the subscriber code
Internal number format	Specify the internal phone numbers format. You can include an X (extension) and remove the leading or trailing digits (in the event that extension numbers are less than 4 digits long).

**To configure the telephone number display:**

- Select or clear the check boxes and radio buttons on the Telephone Number Display tab as desired, and then click Apply to save your changes.

## Outgoing Calls Tab

The Outgoing Calls tab ([Figure 11](#)) enables you to configure your local area codes and exchanges.

**Figure 11. Outgoing Calls tab**

Telephone Number Display | **Outgoing Calls** | Miscellaneous

Local area code:  Advanced Dialing...

Prefixes

Local line access code:  9.

Long distance line access code:  9.

☐ Ensure a 1 on long distance calls

☐ Use area code for toll calls within the area code

☐ Use area code for local calls

Local exchanges

☐ All exchanges are local

Add

Delete

☒ Use North American Dial String Formatting

☐ Use Variable Length Dial String Formatting

Apply Help

**Table 4. Outgoing Calls tab fields**

Tab Section	Description
Local area code	Enter the local 3-digit area code.
Advanced Dialing...	Click to configure advanced internal and external dialing (see <a href="#">page 39</a> ).

Table 4. Outgoing Calls tab fields — *Continued*

Tab Section	Description
Prefixes	<ul style="list-style-type: none"><li>• Local line access code. Enter the number required to access an outside local line.</li><li>• Long distance line access code. The number required to access an outside long distance line.</li><li>• Ensure a 1 on long distance calls. Select to automatically add a 1 at the beginning of a long distance phone number.</li><li>• Use area code for toll calls within the area code. Select to automatically add the local area code to any calls dialed to numbers not included in the local exchange list.</li><li>• Use area code for local calls. Select to automatically add the local area code to any calls dialed to numbers included in the local exchange list.</li></ul>
Local exchanges	Select All exchanges are local or click Add to build a list of exchanges for which it is NOT necessary to add a 1 before dialing

**To configure outgoing calls:**

- Enter information and select or clear the appropriate check boxes on the Outgoing Calls tab as desired, and then click Apply to save your changes.

### Advanced Internal Dialing Tab

The Advanced Internal Dialing tab (Figure 12) enables you to configure more internal dialing options. Access it by clicking the Advanced Dialing button on the Outgoing Calls tab.

Figure 12. Advanced Internal Dialing tab

Table 5. Advanced Internal Dialing tab fields

Tab Section	Description
Extensions	The maximum number of digits in an internal extension number, from 1–9. If you select 7, you must specify the internal exchange and the corresponding range of subscriber numbers so the application can distinguish between a 7-digit internal phone number and a 7-digit outgoing call.
7-digit extensions	If you specified a 7-digit extension number, enter the internal exchange and the corresponding range of extension numbers from low to high. Click Add to add them to the list.

## Advanced External Dialing Tab

The Advanced External Dialing tab (Figure 13) enables you to configure more external dialing options. Access it by clicking the Advanced Dialing button on the Outgoing Calls tab.

Figure 13. Advanced External Dialing tab

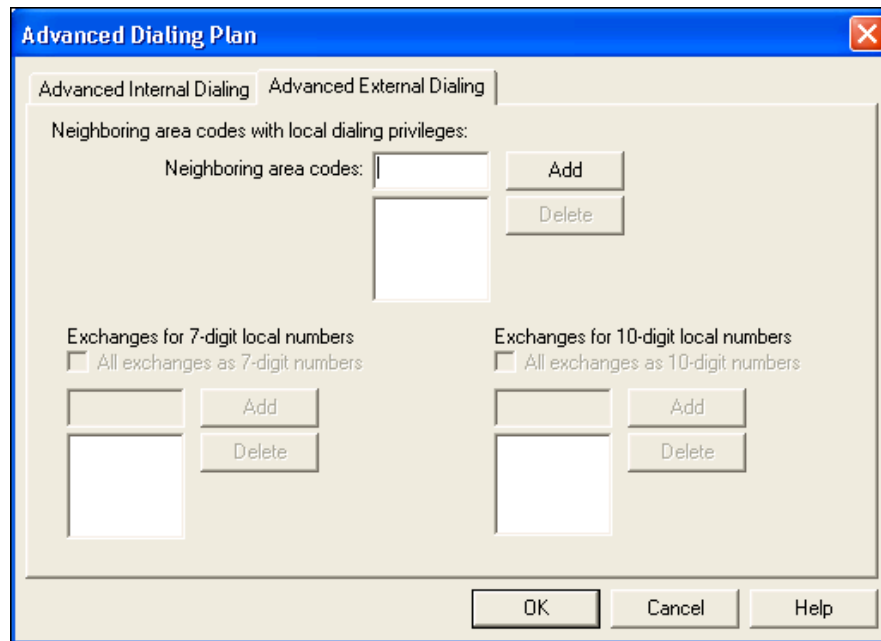


Table 6. Advanced External Dialing tab fields

Window Section	Description
Neighboring area codes with local dialing privileges	The area codes to which you can place non-toll calls. Click Add to add a new area code to the list and click Delete to remove an area code from the list.
Exchanges for 7-digit local numbers	Choose the neighboring area code, then enter the exchanges within that area code which do not require you to dial 1 or the area code. Select All exchanges as 7-digit numbers if no exchange requires you to dial 1 or an area code.



Table 6. Advanced External Dialing tab fields — *Continued*

Window Section	Description
Exchanges for 10-digit local numbers	Choose the neighboring area code, then enter the exchanges within that area code that require you to dial the area code but not a 1. Select All exchanges as 10-digit numbers if all exchanges require you to dial an area code but not a 1.

### Miscellaneous Tab

The Miscellaneous tab ([Figure 14](#)) sets up further dialing properties.

**NOTE:** This tab is the same for the North American and variable length dial string formats.

Figure 14. Miscellaneous tab

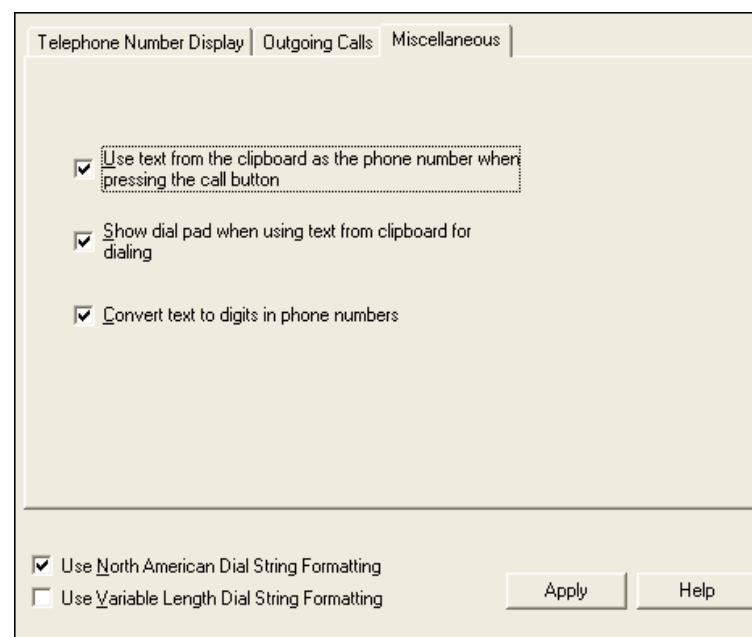


Table 7. Miscellaneous tab fields

Tab Section	Description
Use text from the clipboard as the phone number when pressing the call button	Select to enable CAD to use text on the clipboard as the dialed number when the Make Call button on the CAD toolbar is clicked, as long as the text on the clipboard is a valid text string.
Show the dial pad when using text from the clipboard for dialing.	Available only if “Use text from the clipboard...” is enabled. Select to display the dial pad before dialing a number copied from the clipboard. If this check box is not selected, CAD dials the number without displaying the dial pad.
Convert text to digits in phone numbers	Converts phone numbers expressed in alpha characters (for example, 1-800-ANYWORD) to their numeric equivalents before dialing.

***To configure the miscellaneous options:***

- Select or clear the appropriate check boxes on the Miscellaneous tab as desired, and then click Apply to save your changes.

**Variable Length Dial String Format**

If you choose the variable length dial string format, the following three tabs are active:

- [Telephone Number Display Tab \(page 43\)](#)
- [Phone Number Format Tab \(page 44\)](#)
- [Miscellaneous Tab \(page 45\)](#)

## Telephone Number Display Tab

The Telephone Number Display tab (Figure 15) enables you to configure how phone numbers are displayed in Agent Desktop.

**Figure 15. Telephone Number Display tab**

The selections you make are reflected in the Sample fields. (An exception is if you enter a value in either of the “Remove first ‘n’ digits” and “Remove last ‘n’ digits” fields. In that case, the sample does not change.)

**NOTE:** The number of digits displayed in each section of the sample phone number is for illustration only. The samples do not reflect the number format you set up on the Phone Number Format tab.

**Table 8. Telephone Number Display tab fields**

Tab Section	Description
External number format	Specify how you want to view calling and called phone numbers.
City/subscriber code	Specify the separator you want to display between the city code and the subscriber code.

Table 8. Telephone Number Display tab fields — *Continued*

Tab Section	Description
Internal number format	Specify how internal phone numbers are displayed. You can include an X (extension) and remove the leading or trailing digits (in the event that extension numbers are less than 4 digits long).

**To configure the telephone number display:**

- Enter data and select or clear the appropriate check boxes and radio buttons on the Telephone Number Display tab as desired, and then click Apply to save your changes.

**Phone Number Format Tab**

The Phone Number Format tab (Figure 16) enables you to establish the format for phone numbers that do not follow the North American dial string format. You can also set the maximum number of digits in an internal phone extension.

You can establish as many formats as you want, as long as each one has a unique total length.

Figure 16. Phone Number Format tab

The screenshot shows the 'Phone Number Format' tab within a window titled 'Telephone Number Display'. The tab has three sub-tabs: 'Telephone Number Display', 'Phone Number Format' (which is active), and 'Miscellaneous'. In the 'Phone Number Format' tab, there is a text field labeled 'Maximum number of digits for internal extension:' with the value '4' entered. Below this is a table with three columns: 'Maximum Length', 'City Code Length', and 'Subscriber Code Length'. The table is currently empty. At the bottom of the table area are three buttons: 'Add', 'Edit', and 'Delete'. Below the table area, there are two checkboxes: 'Use North American Dial String Formatting' (which is unchecked) and 'Use Variable Length Dial String Formatting' (which is checked). At the bottom right of the window are two buttons: 'Apply' and 'Help'.

***To add a new phone number format:***

1. Click Add.

The Add City/Subscriber Code Lengths dialog box appears.

2. Enter the number of digits in the city code and the subscriber code, and then click OK.

The numbers you entered are displayed in the phone number format pane, along with the calculated total length of the format. You cannot enter another format with the same total length.

3. Click Apply.

The new phone number format is saved.

***To edit a phone number format:***

1. Choose the number format, and then click Edit.

The Edit City/Subscriber Code Lengths dialog box appears.

2. Make your changes, and then click OK.

3. Click Apply to save your changes.

The phone number format is changed.

***To delete a phone number format:***

1. Choose the number format, and then click Delete.

2. Click Apply to save your changes.

The phone number format is deleted.

**Miscellaneous Tab**

The Miscellaneous tab for the variable length dial string format is the same as the tab for the North American dial string format.

See [“Miscellaneous Tab” on page 41](#) for a description of the Miscellaneous Tab.

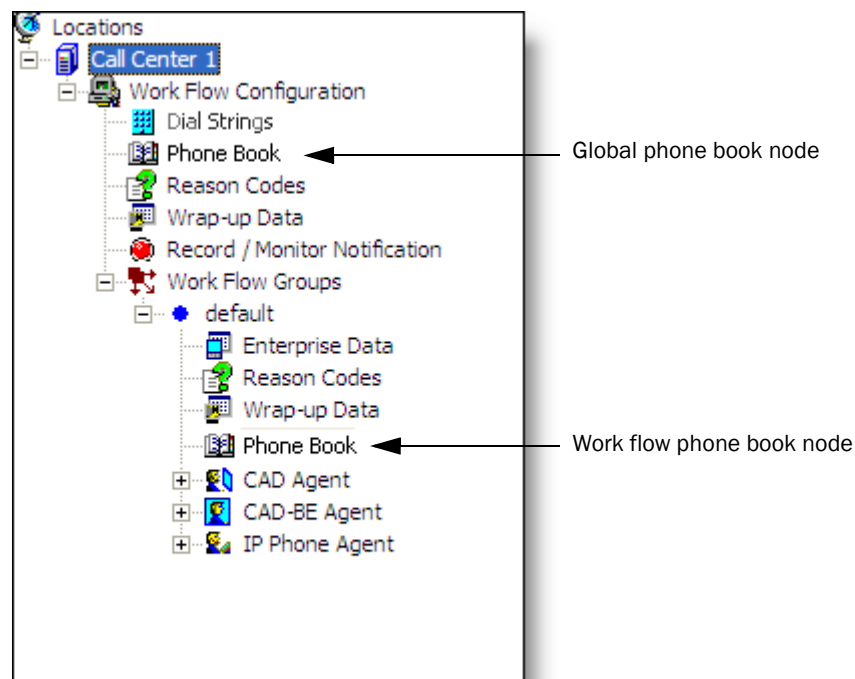
## Phone Book

Agents have a number of phone number lists available to them:

- The Recent Call List, a dynamic list of up to 100 recently-called phone numbers kept by Agent Desktop
- A personal phone book, created and maintained by the agent (and enabled/disabled by the system administrator)
- Up to 256 global phone books, each with unlimited entries, created by the system administrator with the global Phone Book function
- Work flow group phone books, created by the system administrator with the work flow group Phone Book function

Global phone books, which are available to all agents, are created and maintained using the Phone Book node under the Work Flow Configuration node. Work flow groups phone books, which are available to agents only in that specific work flow group, are created and maintained using the Phone Book node under the specific work flow group's node (Figure 17).

Figure 17. Global and work flow phone book nodes

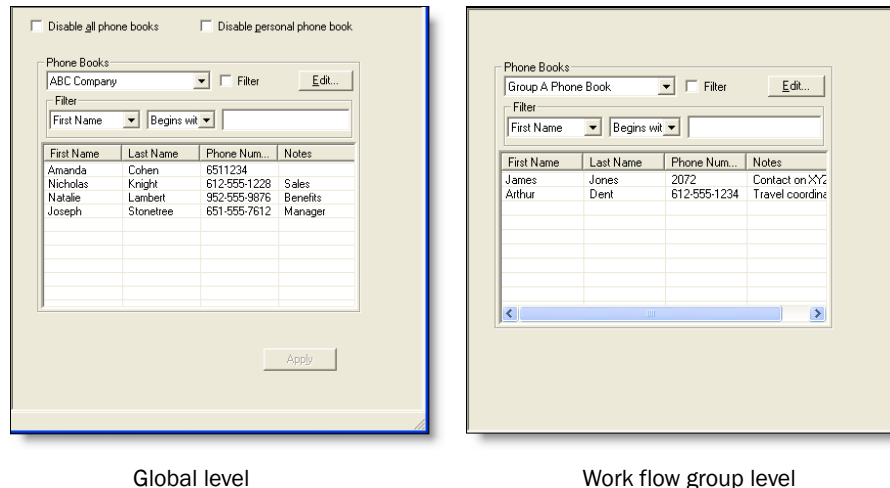


The global Phone Book window (Figure 18, left) enables you to set up and manage the global phone books that are shared by all agents, and to disable all phone books or just personal phone books.

The work flow group Phone Book window (Figure 18, right) enables you to set up and manage the work flow group phone books that are shared by agents in specific work flow groups.

Phone books and phone book entries are created and maintained in the Phone Book Editor dialog box (see “Creating Phone Books” on page 48).

**Figure 18. Phone Book window**



## Using the Phone Book Filter

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

### To use the phone book filter:

1. In the Phone Book window, select the Filter check box.
2. From the Filter drop-down lists, select how you want to filter the entries. In the first two drop-down lists, select your filter criteria: the field to filter by, and the filter method. In the third field, enter the filter string.

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

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

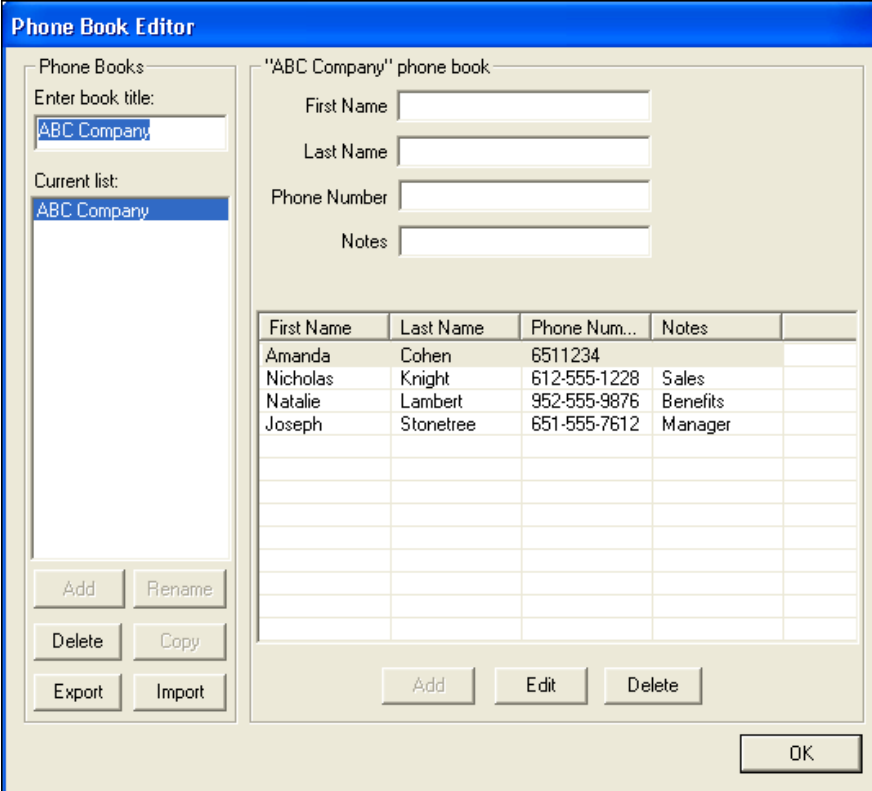
3. To stop filtering the phone book, clear the Filter check box or delete the filter string in the third field. The entire phone book will once again be visible.

## Creating Phone Books

### *To set up a new phone book:*

1. In the global or work flow group Phone Book window, click Edit. The Phone Book Editor dialog box appears ([Figure 19](#)).

**Figure 19.** Phone Book Editor dialog box



The Phone Book Editor dialog box is shown. It has a title bar 'Phone Book Editor'. On the left, there is a 'Phone Books' section with 'Enter book title:' (containing 'ABC Company') and 'Current list:' (containing 'ABC Company'). Below these are buttons: 'Add', 'Rename', 'Delete', 'Copy', 'Export', and 'Import'. On the right, there is a section for the selected phone book, '"ABC Company" phone book', with fields for 'First Name', 'Last Name', 'Phone Number', and 'Notes'. Below these fields is a table with columns: 'First Name', 'Last Name', 'Phone Num...', and 'Notes'. The table contains four rows of data: Amanda Cohen (6511234), Nicholas Knight (612-555-1228, Sales), Natalie Lambert (952-555-9876, Benefits), and Joseph Stonetree (651-555-7612, Manager). At the bottom right of the dialog box is an 'OK' button.

First Name	Last Name	Phone Num...	Notes
Amanda	Cohen	6511234	
Nicholas	Knight	612-555-1228	Sales
Natalie	Lambert	952-555-9876	Benefits
Joseph	Stonetree	651-555-7612	Manager

2. Enter a new phone book name in the Phone Books field, and then click Add. The name of the new phone book is added to the list of phone books.
3. Click OK. The new phone book is saved and the Phone Book Editor dialog box closes.

### *To add phone book entries:*

1. In the Phone Book window, choose the phone book you want to edit from the drop-down list, and then click Edit. The Phone Book Editor dialog box appears.
2. Enter a name, phone number, and note for a person or company, and then click Add to add the information to the phone book. The minimum amount of information required for a phone book entry is the phone number.



The Phone Number field allows only these characters:

- Numbers [0–9]
- Letters [aA–zZ]
- Apostrophe [']
- Left and right parentheses [( )]
- Plus sign [+]
- Forward slash [/]
- Colon [:]
- Period [.]
- Equal sign [=]
- Question mark [?]
- Space

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

3. Repeat Step 2 as needed to enter all entries to the phone book. When all entries are completed, click OK. Your entries are saved and the Phone Book Editor dialog box closes.

***To edit phone book entries:***

1. In the Phone Book window, choose the phone book you want to edit from the drop-down list, and then click Edit. The Phone Book Editor dialog box appears.
2. Choose an entry in the phone book, and then take one of these actions:
  - Click Edit, and then change the entry
  - Click Delete to delete the entry
3. When all edits are completed, click OK. Your changes are saved and the Phone Book Editor dialog box closes.

## **Enabling or Disabling Phone Books**

Phone books can be enabled or disabled only on the global level.

***To enable or disable phone books:***

1. In the Phone Book window ([Figure 18](#)):
  - Select or clear the Disable all phone books check box to remove agent access to all global phone books.

- Select or clear the Disable personal phone book check box to remove access to all agents' personal phone books.

2. Click Apply.

## Importing and Exporting Phone Books

Importing and exporting phone books makes creating and maintaining large phone books (up to 3000 entries) easier than with the Phone Book Editor window. Phone books can be created and edited in any third-party application that accepts comma-separated value (CSV) files, such as a text editor or spreadsheet. Using the third-party application, you can edit exported phone books—make bulk changes (for example, changing an area code), and adding and deleting phone numbers. The updated file can then be imported into Desktop Administrator to replace the previous version.

### CSV File Format

The phone book CSV file contains the fields shown in [Table 9](#).

Table 9. Phone book CSV file details

Field	Max Length	Permitted Characters	Can Be Blank?
First Name	100	Any printable	No
Last Name	100	Any printable	No
Phone Number	40	0–9, aA–zZ, ' ( ) + / : . = ?	No
Notes	256	Any printable	Yes

An example of a phone book CSV file is shown below.

```
"First Name","Last Name","Phone Number","Notes"
"Amanda","Cohen","6511234",""
"Nicholas","Knight","612-555-1228","Sales"
"Natalie","Lambert","952-555-9876","Benefits"
"Joseph","Stonetree","651-555-7612","Manager"
```

A phone book CSV files must conform to this format and include the headers in the first line. During import the file is scanned for illegal characters. If any are found, they are replaced with question marks.

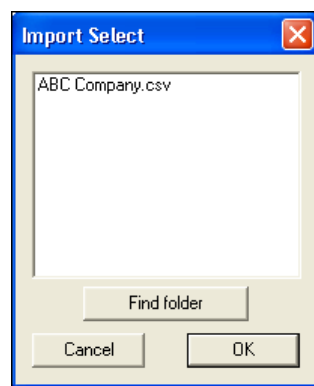
**NOTE:** Exported CSV files will always show each field enclosed in double quotes, as in the example above. This is to ensure that any commas or double quotes that are part of the actual field data are not mistaken for field delimiters. If your data does not include these

characters, you can omit the double quotes in files you prepare for importing.

**To import a phone book:**

1. Make sure the phone book CSV file is formatted correctly, as specified in the section, [“CSV File Format” on page 50](#).
2. In the Phone Book window, click Edit. The Phone Book Editor window appears ([Figure 19 on page 48](#)).
3. Click Import. The Import Select dialog box appears ([Figure 20](#)).

**Figure 20.** Import Select dialog box



Any CSV files located in the default folder C:\Program Files\Cisco\Desktop\config are listed. If your file is located somewhere else, click Find folder to browse to its location.

4. Select the file you want to import and then click Okay. The phone book is imported and is added to the list of available phone books in the Current List pane.

The CSV file name (without the CSV suffix) becomes the phone book name. If that name is already in use, you will be asked if you want to replace the existing phone book with the imported phone book. If you do not want to replace the existing phone book, cancel the import, rename the CSV file, and try again.

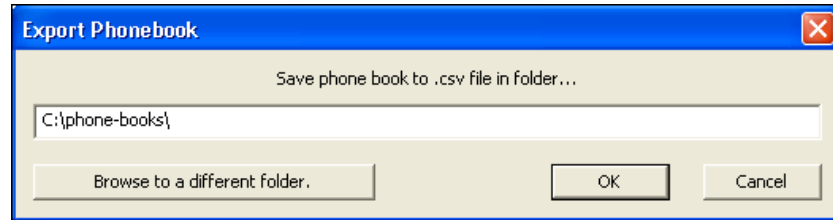
5. Click OK to close the Phone Book Editor window.

**To export a phone book:**

1. In the Phone Book window, click Edit. The Phone Book Editor window appears ([Figure 19 on page 48](#)).

2. In the Current list pane, select the phone book you want to export, and then click Export. The Export Phone Book dialog box appears (Figure 21).

**Figure 21.** Export Phone Book dialog box



3. The default export location is the C:\Program Files\Cisco\Desktop\config folder. If you have imported or exported a phone book previously, the location you chose then is shown. If you want to export the phone book to a different location, click Browse to a different folder and navigate to that location.
4. Click OK. The phone book is exported to the selected location. The file name is the name of the phone book with the CSV file extension.

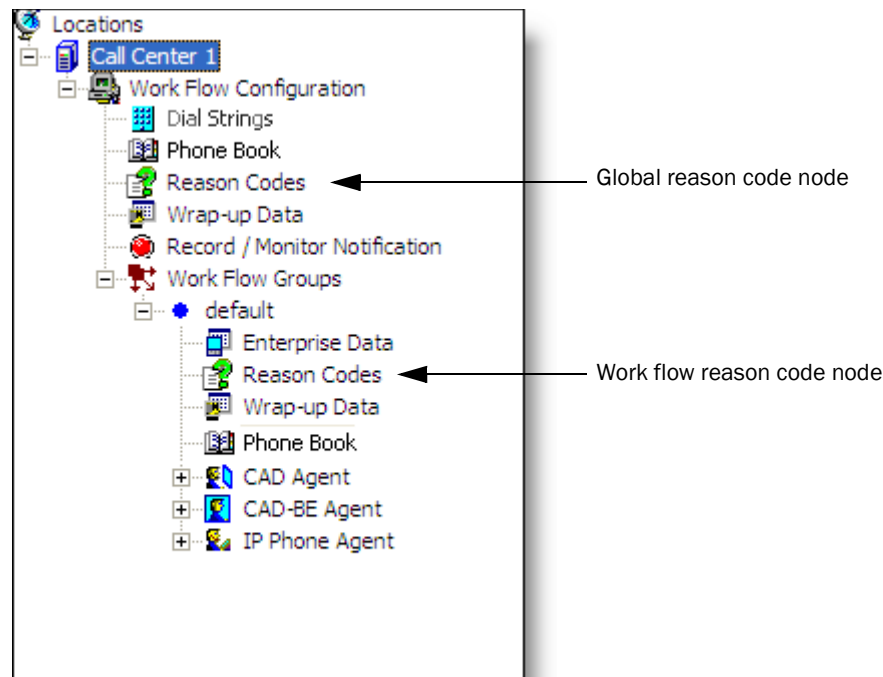
## Reason Codes

Reason codes describe why an agent has changed to the Not Ready agent state or has logged out.

A maximum of 999 reason codes can be set up for CAD and CAD-BE. IP Phone Agent has a limit of 100 reason codes.

Global reason codes, which are available to all agents, are assigned using the Reason Codes node under the Work Flow Configuration node. Work flow group reason codes, which are available only to agents in that specific work flow group, are assigned using the Reason Codes node under the specific work flow group's node (Figure 22).

Figure 22. Global and work flow phone book nodes



Reserved reason codes (identified by [RESERVED] after the description) are predefined in Directory Services and cannot be created or deleted.

There are also Unified CCX-generated reason codes that are entered when an agent is automatically put in the Not Ready or Logout state. For instance, when an agent receives a non-ACD call, the agent is put into the Not Ready state by Unified CCX and the reason code "32761-Non-ACD Call" is entered.

The reserved reason codes are listed in [Table 10](#).

**Table 10. Reserved reason codes**

Code	State	Description
22	Logout	Supervisor logout.
33	Not Ready	Supervisor Not Ready.
1000		ACD voice.
32755	Not Ready	Call ended. The system issues this reason code when an agent is moved to the Not Ready state after handling a Unified CCX call.
32756	Not Ready	Device in service (phone up). The system issues this reason code when the agent's phone comes up after it has been through a Phone Down state.
32757	Not Ready	CallManager failover. The system issues this reason code when the Unified CM fails over and the agent is moved to the Not Ready state.
32758	Not Ready	Work timer expired. The system issues this reason code when an agent's state is changed from Work to Not Ready. This change occurs if the Work state for that agent's CSQ is associated with an expired wrap-up time.
32759	Not Ready	Device out of service (phone down). The system issues this reason code if the agent's phone crashes and that agent is placed in the unavailable state.
32760	Not Ready	Logon. The system issues this reason code when an agent logs in and is automatically placed in the Not Ready state.
32761	Not Ready	Non-ACD call. The system issues this reason code when the agent is logged on to Agent Desktop or IP Phone Agent and then receives a call that is not queued on the Unified CCX platform.
32762	Not Ready	Off hook. The system issues this reason code when the agent goes off the hook to place a call. If the agent remembered to do this task the corresponding agent-triggered reason code is displayed. If the agent did not remember to do this task, the system issues this reason code.
32763	Not Ready	Ring no answer. The system issues this reason code when the agent fails to answer a Unified CCX call within the specified timeout period.

Table 10. Reserved reason codes — *Continued*

Code	State	Description
32764	Logout	CRS failover. The system issues this reason code when the active server becomes the standby server and the agent loses connection to the Unified CCX platform.
32765	Logout	Connection down. The system issues this reason code when IP Phone Agent or Agent Desktop crashes due to any reason or if the connection is disrupted.
32766	Logout	Force logout (close Agent Desktop). The system issues this reason code when an agent closes Agent Desktop without logging off.
32767	Logout	Force login (agent relogin). The system issues this reason code when an agent is already logged in to one device (computer or phone) and then tries to log in to a second device.

Not Ready and Logout reason codes are enabled or disabled on the work flow group level.

When creating reason codes, follow these guidelines:

- Descriptions can consist of up to 40 alphanumeric characters. No punctuation or other characters are allowed.
- No agent state can contain duplicate numbers and descriptions among its reason codes.
- Reason code numbers can be any number from 0 to 999.

**NOTE:** While 0 is an allowed reason code number, it is strongly recommended that you do not use it. Using 0 as a reason code can result in control failures or missing agent state events in Unified CCX.

- Reason codes are either all enabled or all disabled for both the Not Ready and Logout agent states. You cannot enable reason codes for one state and disable them for another.
- You cannot enable reason codes unless at least one user-defined reason code exists for Logout and one exists for Not Ready.

**NOTE:** Agents must restart Agent Desktop, Agent Desktop–Browser Edition, and IP Phone Agent to see any changes you make to reason codes.

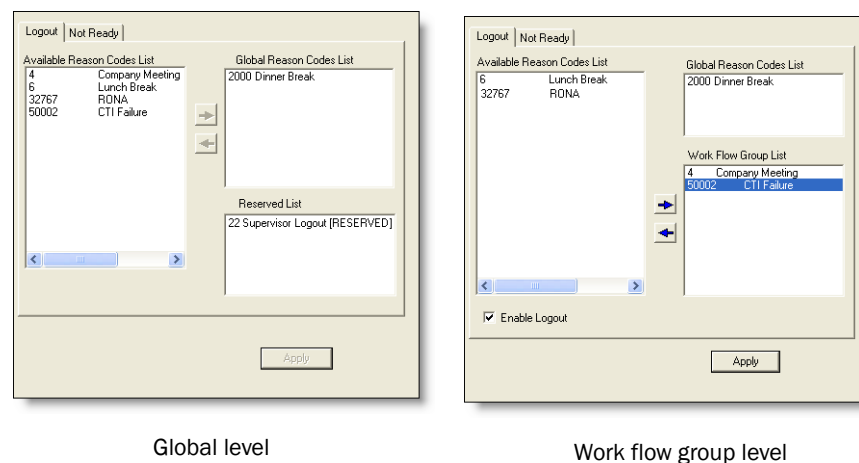
**NOTE:** For Chinese, Japanese, and Korean localized sites, reason codes might not appear correctly in IP Phone Agent due to the phone limitations on multi-byte characters.

## Assigning Reason Codes

### To assign global reason codes:

1. Select the global Reason Codes node in the navigation tree to display the Reason Codes window (Figure 23, left).

**Figure 23. Reason Code window**



2. Select the appropriate tab for the type of reason codes you want to assign: Logout or Not Ready.
3. From the Available Reason Codes List, select the reason codes you want available to all agents, and then click the right arrow button to move them to the Global Reason Codes List.
4. Click Apply.

### To assign work flow reason codes:

1. Select the Reason Codes node under the desired work flow group in the navigation pane to display the Reason codes window (Figure 23, right).
2. Select the appropriate tab for the type of reason codes you want to assign: Logout or Not Ready.
3. From the Available Reason Codes List, select the reason codes you want available to agents in that work flow group, and then click the right arrow button to move them to the Work Flow Group List.



4. Select the Enable Logout Reason Codes or Enable Not Ready Reason Codes check box to enable that type of reason code for the agents in that work flow group. This includes any global reason codes set up.
5. Click Apply.

### **Enabling or Disabling Reason Codes**

Reason codes can be enabled or disabled only on the work flow group level, and must be done individually for every work flow group.

#### ***To enable or disable reason codes:***

1. Select the Reason Codes node under the work flow group whose reason codes you want to enable or disable.
2. Select the appropriate tab and then select or clear the Enable Logout Reason Codes or Enable Not Ready Reason Codes check box.
3. Click Apply.

## Wrap-up Data

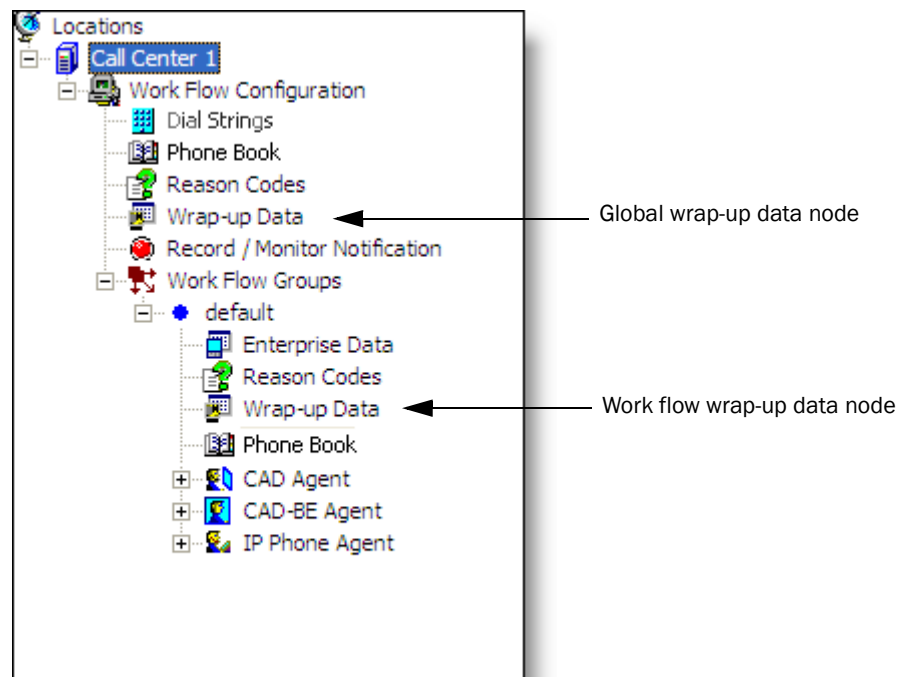
Wrap-up data descriptions are used by contact centers for purposes such as tracking the frequency of different activities and identifying the account to which to charge a call, among others. Wrap-up data is set up and maintained, and automated state changes are enabled, using the Wrap-up Data window. Wrap-up data descriptions are used for both calls and e-mails.

There is no limit on how many wrap-up data descriptions can be set up for CAD and CAD-BE. IP Phone Agent has a limit of 100 wrap-up data descriptions.

**NOTE:** CAD and CAD-BE agents must log out, exit, and restart the application for changes to take effect.

Global wrap-up data descriptions, which are available to all agents, are created and assigned using the Wrap-up Data under the Work Flow Configuration node. Work flow group wrap-up data descriptions, which are available to agents only in that specific work flow group, are created and assigned using the Wrap-up Data node under the specific work flow group's node ([Figure 24](#)).

Figure 24. Global and work flow wrap-up data nodes



In Agent Desktop, CAD-BE, and IP Phone Agent, the agent selects the appropriate wrap-up data description at the beginning of the wrap-up work time for a call or sent e-mail.

When creating wrap-up data descriptions, follow these guidelines:

- Descriptions can consist of up to 39 alphanumeric characters. No punctuation or other characters are allowed.

**NOTE:** For Chinese, Japanese, and Korean localized sites, descriptions might not appear correctly in IP Phone Agent due to the phone limitations on multi-byte characters.

- Duplicate descriptions are not allowed.

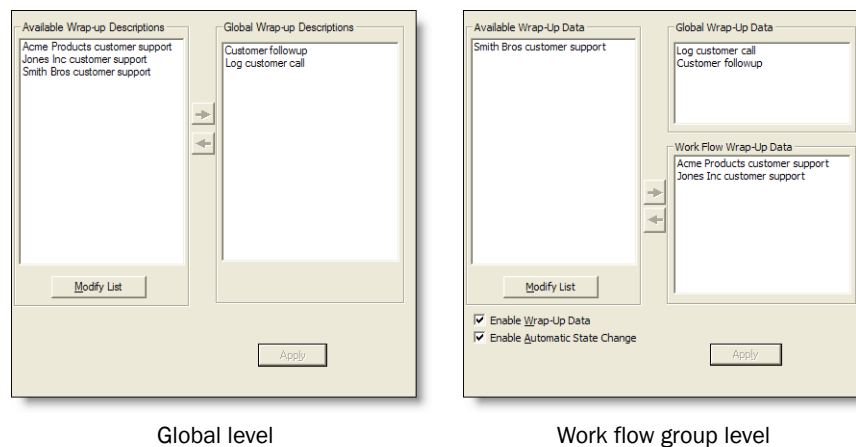
## Creating Wrap-up Data Descriptions

You can create and modify wrap-up data descriptions on both the global and work flow group level.

*To create a wrap-up data description:*

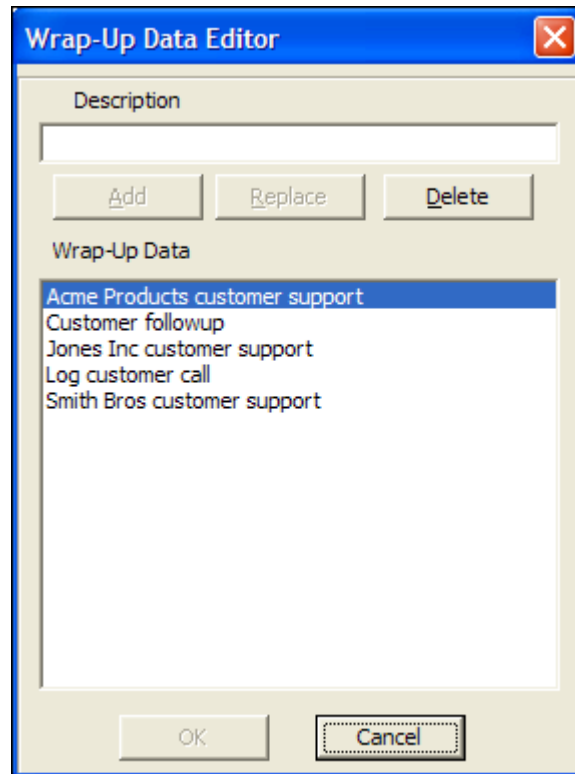
1. Select the global or work flow group Wrap-up Codes node in the navigation tree to display the Wrap-up Codes window (Figure 25).

**Figure 25. Wrap-up Data window**



2. Click Modify List to display the Wrap-up Data Editor dialog box (Figure 26).

Figure 26. Wrap-up Data Editor dialog box



3. Type the new wrap-up data description in the Description field, and then click Add. The wrap-up data description is added to the Wrap-up Data list.
4. Click OK close the dialog box, and then click Apply to save your changes.

**To edit a wrap-up data description:**

1. Select the global or work flow group Wrap-up Data node in the navigation tree to display the Wrap-up Data window (Figure 25).
2. Click Modify List to display the Wrap-up Data Editor dialog box (Figure 26).
3. Double-click the wrap-up data description you want to edit.
4. In the pop-up dialog box, edit the description as desired and then click OK.
5. Click OK to close the Wrap-up Data Editor dialog box, and then click Apply to save your changes.

***To delete a wrap-up data description:***

1. Select the global or work flow group Wrap-up Data node in the navigation tree to display the Wrap-up Data window (Figure 25).
2. Click Modify List to display the Wrap-up Data Editor dialog box (Figure 26).
3. Select the wrap-up data description you want to delete, and then click Delete.
4. Click OK to close the dialog box, and then click Apply to save your changes.

**Assigning Wrap-up Data Descriptions**

Wrap-up data descriptions can be assigned at the global and at the work flow group level. Global wrap-up data descriptions are available to all agents. Work flow group level wrap-up data descriptions are available only to the agents in that specific work flow group.

***To assign global wrap-up data descriptions:***

1. Select the global Wrap-up Data node in the navigation tree to display the Wrap-up Data window (Figure 25, left).
2. From the Available Wrap-up Descriptions list, select the descriptions you want available to all agents, and then click the right arrow button to move them to the Global Wrap-up Descriptions list.
3. Click Apply.

***To assign work flow wrap-up data descriptions:***

1. Select the Wrap-up Data node under the desired work flow group in the navigation pane to display the Wrap-up Data window (Figure 25, right).
2. From the Available Wrap-up Data list, select the descriptions you want available to agents in that work flow group, and then click the right arrow button to move them to the Work Flow Wrap-up Data list.
3. Select the Enable Wrap-up Data check box to enable wrap-up data for the agents in that work flow group. This includes any global wrap-up data descriptions set up.
4. Click Apply.

**Enabling or Disabling Wrap-up Data**

Wrap-up data can be enabled or disabled only on the work flow group level.

***To enable or disable wrap-up data:***

1. Select the Wrap-up Data node under the work flow group whose wrap-up data descriptions you want to enable or disable.

2. Select or clear the Enable Wrap-up Data check box.
3. Click Apply.

## **Automatic State Changes**

By default, automatic state changes are not enabled. After agents enter wrap-up data, they remain in the Work state for the length of time set for the wrap-up timer or until they change states manually, whichever happens first. (The wrap-up timer value is configured in Unified CCX Administration.)

If automatic state changes are enabled, agents are automatically changed from the Work state to the Ready state (or to the Not Ready state, if they select that state while still on a call) after they enter wrap-up data.

Automatic state changes can be enabled or disabled only on the work flow group level.

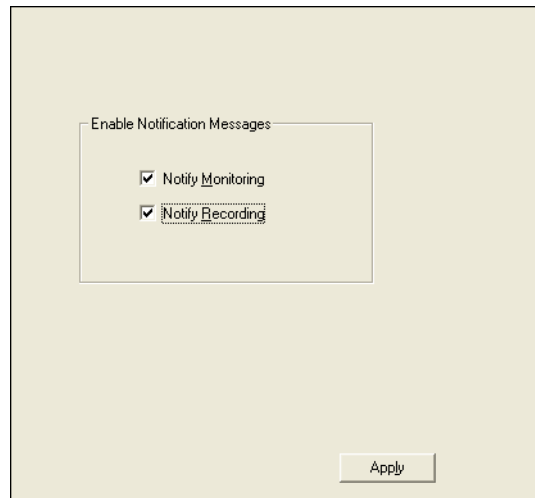
### ***To enable or disable automatic state changes:***

1. Select the Wrap-up Data node under the work flow group whose automatic state changes you want to enable or disable.
2. Select or clear the Enable Automatic State Change check box.
3. Click Apply.

## Monitor/Record Notification

The Monitor/Record Notification window (Figure 27) is used at the global level to enable or disable messages to agents that they are being recorded or monitored, or both.

**Figure 27.** Monitor/Record Notification window



***To enable or disable agent notification:***

1. Select the Record/Monitor Notification node in the navigation tree.
2. In the Record/Monitor Notification window, select or clear the Notify Monitoring and/or Notify Recording check boxes, and then click Apply.

You can also enable/disable monitoring and recording from the menu bar.

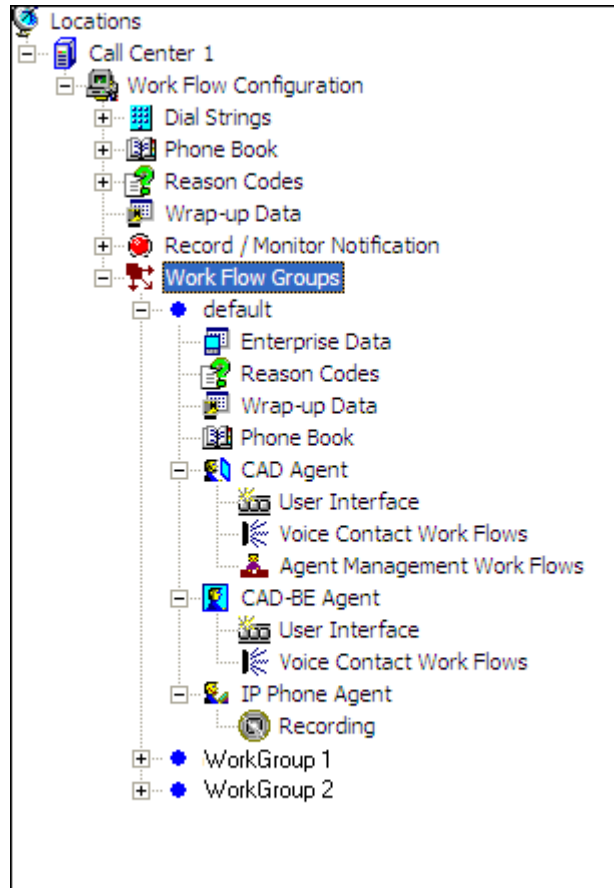
***To enable or disable agent notification from the menu bar:***

- From the menu bar, choose Monitoring > Notify Monitoring and/or Monitoring > Notify Recording. A check mark appears next to the option when it is enabled.

## Work Flow Groups

Use the Work Flow Groups function to create and configure agent work flow groups.

Figure 28. Accessing the Work Flow Group functions in the navigation pane



Under the Work Flow Groups node are individual work flow groups. Initially there is a default work flow group, which can be edited, renamed, or deleted. You can also create additional work flow groups.

When you click on a work flow group, the elements that make up and apply only to that work flow group appear as subnodes:

- Enterprise Data—Configure enterprise data on the agent desktop.
- Reason Codes—Assign reason codes.
- Wrap-up Data—Create and edit wrap-up data.
- Phone Book—Create and edit phone books.



- CAD Agent—Configure the user interface and voice contact work flow, and agent management work flows for agents using Cisco Agent Desktop.
- CAD-BE Agent—Configure the user interface and voice contact work flows for agents using Cisco Agent Desktop—Browser Edition.
- IP Phone Agent—Enable agent-initiated recording for agents using the Cisco IP Phone Agent service.

## Maintaining Work Flow Groups

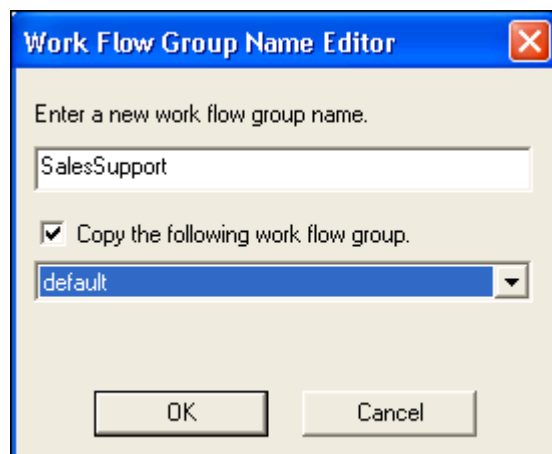
You can add, delete, or edit work flow groups under the Work Flow Groups node.

**NOTE:** If you choose to delete the default work flow group, make sure that all agents are assigned to a custom work flow group you have set up. If an agent is not assigned to a work flow group, and there is no default work flow group, that agent will not be able to start Agent Desktop.

### *To add a new work flow group:*

1. In the Navigation pane, choose the Agents node or work flow group subnode (for example, under Agents, choose the Default work flow group).
2. From the menu bar, choose File > New. The Work Flow Group Name Editor dialog box appears (Figure 29).

Figure 29. Work Flow Group Name Editor dialog box



3. Enter a new work flow group name. The name can be a maximum of 64 characters long.

If you want to copy an existing work flow group, select the “Copy the following work flow group” check box and choose a work flow group from the drop-down list.

4. Click OK. The new work flow group appears in the Navigation pane. The new work flow group has the same setup as the default work flow group.

***To delete an existing work flow group:***

1. In the Navigation pane, choose the work flow group you want to delete.
2. From the menu bar, choose File > Delete.

You are warned that all agents belonging to the work flow group you want to delete must be reassigned to other work flow groups. Click Yes to confirm the deletion, or No to cancel it. If you do not reassign the agents, you will not be able to delete the work flow group.

3. Click OK to close the dialog box.

***To rename a work flow group:***

1. Add a new work flow group.

Name the new work flow group with the name you want the existing work flow group to be renamed.

Select the “Copy the following work flow group” check box and select the existing work flow group from the drop-down list.

2. Delete the old work flow group.

## Enterprise Data

The Enterprise Data window enables you to:

- Configure Agent Desktop so that agents in the selected work flow group can edit enterprise data
- Set thresholds for call duration at a particular type of device while a call is in the contact center

### Data

The Data tab ([Figure 30](#)) controls whether or not an agent in the work flow group is allowed to edit the enterprise data displayed in Agent Desktop.

Figure 30. Data tab



*To enable enterprise data editing:*



- Select the Allow agent to edit Enterprise Data check box, and then click Apply.

## Call Activity

The Call Activity tab (Figure 31) enables you to set the thresholds for the selected work flow group for call duration at a particular type of device (CSQ and Agent) while a call is in the contact center.

If a call remains at a device longer than the defined Caution or Warning threshold, a Caution or Warning icon is displayed next to the device name in the Agent Desktop call activity pane.

Figure 31. Call Activity tab

Device Type	Caution 		Warning 	
	Min	Sec	Min	Sec
CSQ:	0	0	0	10
Agent:	0	0	0	10
Total:	0	0	0	10

Enter a Warning threshold before entering a Caution threshold.  
The Warning threshold must be greater than the Caution threshold.

Apply

### To set up call activity thresholds:

1. On the Call Activity tab, enter the threshold times as desired.

Enter values in the Warning fields before entering values in the Caution fields. If you enter values in the Caution fields first, Desktop Work Flow Administrator automatically enters values one second greater in the Warning fields.

The Warning threshold value must be greater than the Caution threshold value. If you enter a greater value in the Caution field, Desktop Work Flow Administrator automatically changes it so that it is one second less than the Warning value.

Maximum Warning value: 59 minutes, 59 seconds

Maximum Caution value: 59 minutes, 58 seconds

2. Click Apply to save your changes.

## CAD, CAD-BE, and IP Phone Agent

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The CAD Agent, CAD-BE Agent, and IP Phone Agent nodes enable you to configure various functions for each type of agent within the selected work flow group.

### CAD Agent

You can configure the following for agents using Agent Desktop:

- [User Interface \(page 71\)](#)
- [Voice Contact Work Flows \(page 85\)](#)
- [Agent Management Work Flows \(page 93\)](#)

### CAD-BE Agent

You can configure the following for agents using CAD-BE:

- [User Interface \(page 71\)](#)
- [Voice Contact Work Flows \(page 85\)](#)

### IP Phone Agent

The Recording node under the IP Phone Agent node enables agent-initiated recording for agents who use the IP Phone Agent service.

**NOTE:** If your CAD system is configured to use Unified CM-based monitoring, the IP Phone Agent node is not available.

When enabled, the IP Phone Agent service has soft key options for starting and stopping recording. The IPPA agent can then record his or her own phone conversations, and these recordings can be reviewed by the supervisor using Supervisor Record Viewer.

See the *Cisco IP Phone Agent User Guide* and the *Cisco Supervisor Desktop User Guide* for more information.

**To enable IPPA agent-initiated recording:**

1. Select the Enable IPPA Recording check box.
2. Click Apply to save your changes.

## User Interface

The User Interface window enables you to configure the appearance and behavior of Agent Desktop (when accessed under the CAD Agent node) and CAD-BE (when accessed under the CAD-BE Agent node).

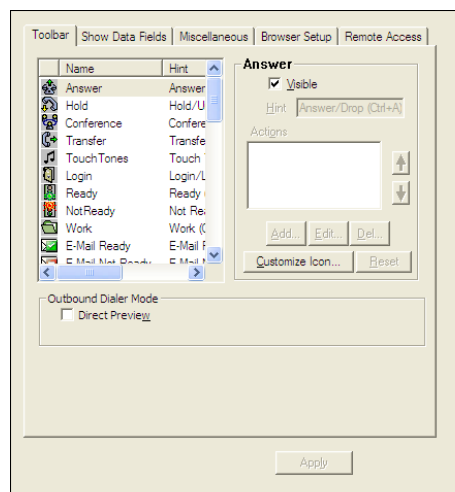
**NOTE:** The User Interface windows for CAD Agent and CAD-BE Agent are slightly different to allow for the differences in the two applications. The following section will discuss the CAD Agent version and note where it is different for CAD-BE Agent.

### Toolbar

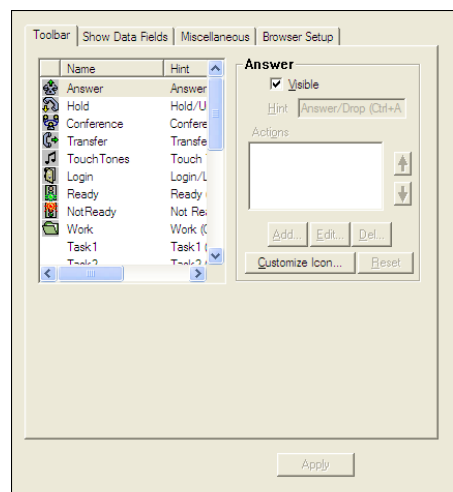
The Toolbar tab (Figure 32) enables you to:

- [Adding and Removing Toolbar Buttons \(page 72\)](#)
- [Associating Actions with Task Buttons \(page 72\)](#)
- [Changing a Task Button's Hint \(page 73\)](#)
- [Customizing Button Icons \(page 73\)](#)
- [Show Data Fields \(page 75\)](#)

Figure 32. Toolbar tab



CAD Agent version



CAD-BE Agent version

## Adding and Removing Toolbar Buttons

The pane on the left of the Toolbar tab displays the buttons that are available to be used on the Agent Desktop toolbar. Buttons that are assigned show an icon next to them; unassigned buttons do not show an icon.

You cannot change the hint or the shortcut key combination on any of the standard buttons, or assign an additional action to them. You can, however, customize the icon displayed on the button (see [“Customizing Button Icons” on page 73](#)).

### *To add a button to the toolbar:*

1. In the list of buttons, select the available button you want to add.
2. Select the Visible check box, and then click Apply.

### *Removing a button from the toolbar:*

1. In the list of buttons, select the button you want to remove.
2. Clear the Visible check box, and then click Apply.

## Adding the Cisco Unified Outbound Dialer Toolbar

The Cisco Unified Outbound Dialer feature is available only for Agent Desktop Premium version users. You cannot add the Outbound Dialer toolbar to CAD-BE.

### *To add an Outbound Dialer toolbar to Agent Desktop:*

- In the Outbound Dialer Mode section, select the Direct Preview dialing mode check box and then click Apply. The Outbound Dialer buttons are added to the Agent Desktop toolbar.

For more information, see [“Cisco Unified CCX Outbound Preview Dialer” on page 139](#).

## Associating Actions with Task Buttons

You can associate as many actions with a task button as you wish. The actions are executed sequentially in the order they are listed in the Actions window.

**NOTE:** Bear in mind the amount of time it takes to execute actions. Generally, a maximum of two or three actions per task button is recommended.

The default task buttons display icons of the numbers 1 through 10. You can customize these icons if you wish.

### *To associate an action with a task button:*

1. Select a task button from the list of available buttons.



2. Select the Visible check box. The Actions pane and its associated buttons become enabled.
3. Under the Actions pane, click Add. The Select Action window appears.
4. Select the action you want to associate with the button.

You can select an existing action or set up a new action. (See [“Actions” on page 98](#) for more information on setting up new actions.)
5. Click OK. The Toolbar tab is displayed.
6. Type a short description of the action in the Hint field. You can replace only the hint; you cannot change the shortcut key combination.
7. Repeat Steps 3–6 if you want to add other actions to the same task button.
8. Click Apply to save your changes.

### Changing a Task Button's Hint

You can change the hint (the text an agent sees when the mouse hovers over a button) associated with a task button.

You cannot change the hint associated with a standard button, or change the shortcut key combination of any button.

#### *To change a task button's hint:*

1. Select the button whose hint you want to change.
2. In the Hint field, type the hint you want displayed to the agent.
3. Click Apply to save your changes.

### Customizing Button Icons

Buttons can be customized by applying different icons to them. A library of available icons is supplied with Desktop Work Flow Administrator, or you can use icons of your own.

If you use your own icons, when applied to a button the icon file is written to Directory Services so it is available to all instances of Agent Desktop.

Custom icons must meet the following specifications.

- ICO format
- 50 Kb file size limit
- 16 × 16 or 32 × 32 pixels
- up to 256 colors

**To customize an icon:**

1. Choose the button whose icon you want to customize.
2. Click Customize Icon. The Choose Icon dialog box appears (Figure 33).

**Figure 33. Choose Icon dialog box**

3. Choose an icon. The icon is displayed in the Preview area.  
You can also click Browse to navigate to another location if you wish to use your own icon.
4. Click OK. The button is displayed with the new icon on it in the button list.

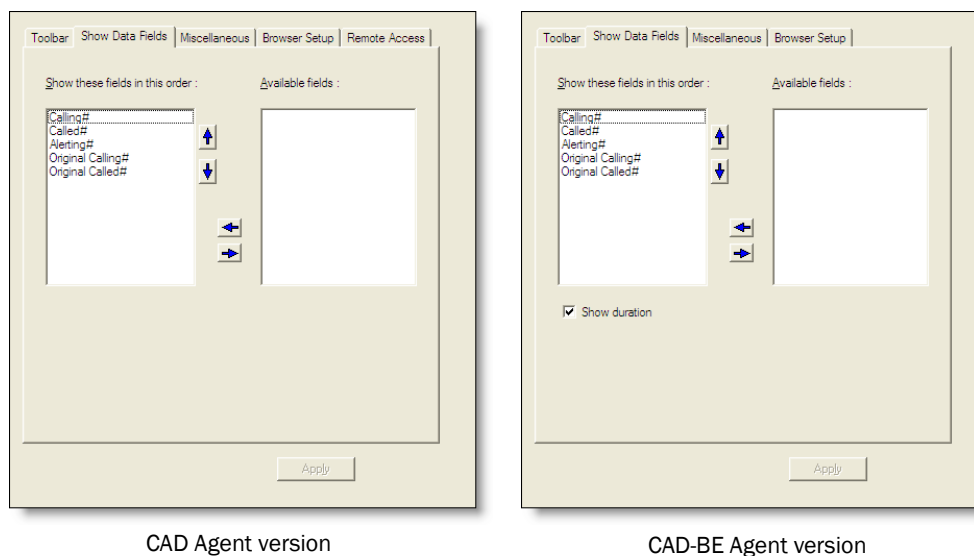
**To reset a button icon:**

1. Select the button that has the icon that you previously customized. The Reset button becomes enabled.
2. Click Reset. The original icon is displayed in the button list.
3. When you are finished, click Apply to save your changes.

## Show Data Fields

The Show Data Fields tab (Figure 34) configures the data fields that appear in the contact appearance pane in Agent Desktop and CAD-BE, and enables you to rename data fields. It also allows you to enable/disable incrementing duration fields in CAD-BE.

**Figure 34. Show Data Fields tab**



**NOTE:** Agent Desktop and CAD-BE agents must log out, exit, and log in again for changes to take effect.

### Configuring and Renaming Data Fields

The left pane displays the fields that appear in Agent Desktop and CAD-BE. The right pane displays the available fields.

**NOTE:** The left pane must contain at least one field.

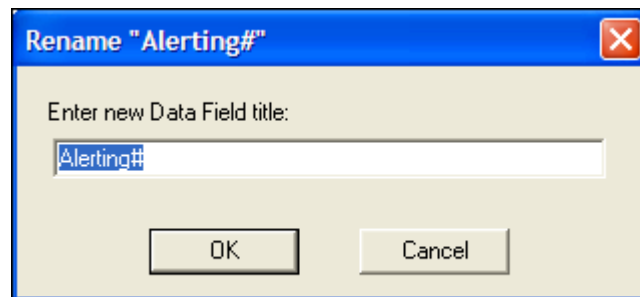
#### *To configure data fields:*

1. Use the left and right arrows to move the available fields between the left and right panes, and the up and down arrows to set the left-to-right order in which the fields will appear.
2. Click Apply to save your changes.

**To rename a data field:**

1. Double-click the field you want to rename. The Rename dialog box appears (Figure 35).

Figure 35. Rename dialog box



2. Enter a new name and then click OK.

**Show Duration**

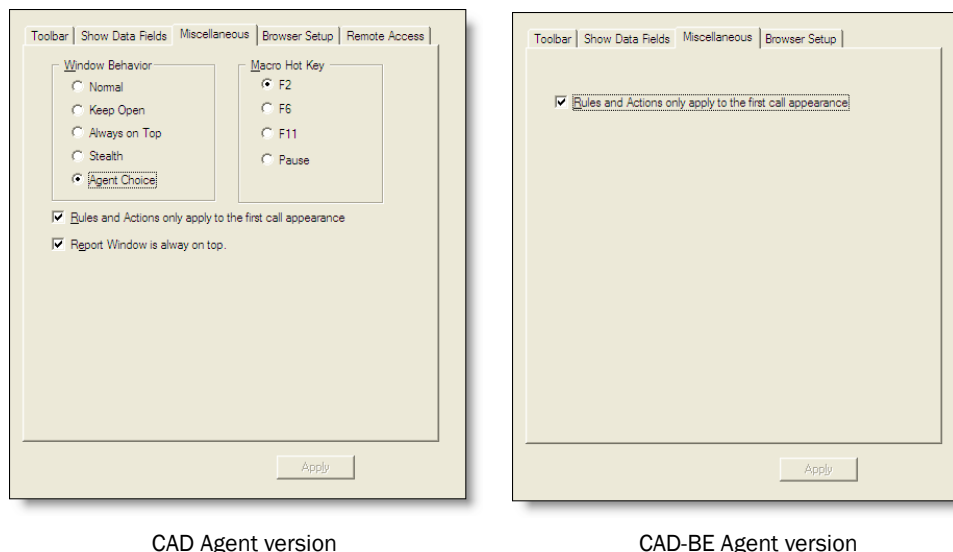
For CAD-BE agents, select the Show Duration check box to enable the Duration field in CAD-BE to increment during a call. By default this option is enabled. However, a continually changing field can cause difficulties for screen readers, so this field might be disabled for agents who are visually impaired.

For CAD agents, this feature is enabled/disabled in the Agent Desktop Preferences.

## Miscellaneous

Use the Miscellaneous tab (Figure 36) to configure other user interface options. Select or check your desired settings, and then click Apply to save your changes.

**Figure 36. Miscellaneous tab**



**Table 11. Miscellaneous Tab options**

Option	Description
Window Behavior	<p>Specify how you want the Agent Desktop window to behave. The default setting is Agent's Choice.</p> <ul style="list-style-type: none"> <li>• Normal. The window appears when calls are present and minimizes when idle.</li> <li>• Keep Open. The window is always visible, but can be hidden by other open applications.</li> <li>• Always on Top. The window is always visible and on top of other open applications.</li> <li>• Stealth. The window appears as an icon in the system tray.</li> <li>• Agent's Choice. Behavior is set locally by the agent. The local setting persists until reset or until you choose something other than Agent's Choice. On the agent's desktop, the default setting is Normal.</li> </ul>

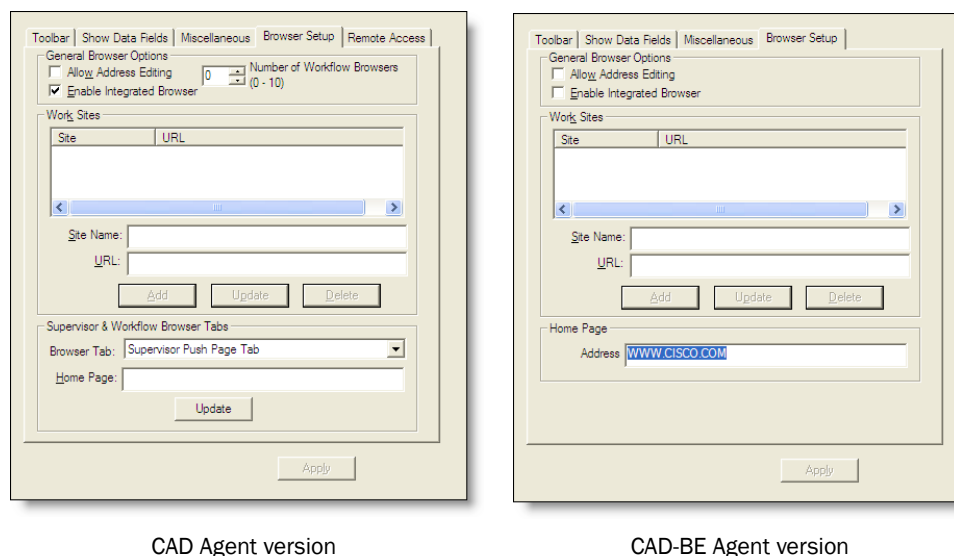
**Table 11. Miscellaneous Tab options**

Option	Description
Macro Hot Key	Specify the key you want to use to pause macro recording and display the Suspend Macro Recording dialog. The default is F2.
Rules and Actions only apply to the first call appearance	Select to invoke rules processing only for the oldest (top) call appearance. If the check box is not selected, rules processing is invoked for all inbound calls.

## Browser Setup

Use the Browser Setup tab (Figure 37) to configure the Integrated Browser portion of Agent Desktop and CAD-BE. On this tab you can:

- Enable/disable the integrated browser window
- Set the default web page displayed by the browser
- Enable up to 10 browser tabs
- Enable/disable agents' access to other websites
- Add work sites (or "favorites") so agents can quickly access frequently-used websites

**Figure 37. Browser Setup tab**

### Enabling the Integrated Browser

You can enable/disable the integrated browser in Agent Desktop/CAD-BE by selecting or clearing the Enable Integrated Browser check box at the bottom of the Browser Setup tab.

### Enabling Access to Other Websites

You can enable/disable an agent's access to other websites by selecting or clearing the Allow Address Editing check box. When selected, the Address field appears in the integrated browser window, and agents can enter the URL of a website they wish to view. When disabled, the Address field does not appear in the integrated browser window.

### Configuring the Number of Browser Tabs

Choose 0 to 10 in the Number of Work Flow Browsers field to set how many browser tabs appear in Agent Desktop (this feature is not available in CAD-BE). If you choose 0, only the supervisor push page tab appears—it is always enabled. If you choose 1 to 10, that many tabs in addition to the supervisor push page tab appear.

Work flow HTTP actions can be set up to display web pages in a specific browser tab. See [“HTTP Action” on page 111](#) for more information.

### Setting Up the Home Page

A home page is the website that appears in the integrated browser when Agent Desktop or CAD-BE is started. The default website is [www.cisco.com](http://www.cisco.com). If no home page is configured (the default is deleted), the integrated browser tab is blank.

#### *To configure a home page:*

1. From the Browser Tab drop-down list, select the tab where you want the home page to appear.
2. In the Home Page field, type the web address (URL) of the website you want to appear by default in the integrated browser.
3. Click Update.
4. Repeat steps 1 through 3 for each tab as desired.
5. Click Apply to save your changes. The home page is set.

### Setting Up Work Sites

A work site is a website that is frequently accessed by agents to assist them in their jobs. They are similar to the “favorites” you can set up in a web browser.

Work sites you set up appear in a drop-down list in the agent's integrated browser. When the agent selects a work site from the list, it is displayed in the integrated

browser window. This allows the agent quick access to the site without having to type its address in the (optional) Address field.

***To add a work site:***

1. In the Site Name field, type the name of the website you wish to add as a work site.
2. In the URL field, enter the web address of the website.
3. Click Add. The work site is added to the list in the Work Sites pane.
4. Click Apply to save your changes.

***To update a work site:***

1. In the Work Sites field, select the work site you wish to update. The information for the website appears in the Site Name and URL fields.
2. Edit the information as needed, and then click Update. The updated information appears in the Work Sites pane.
3. Click Apply to save your changes.

***To delete a work site:***

1. In the Work Sites pane, select the work site you wish to delete. The information for the website appears in the Site Name and URL fields.
2. Click Delete. The work site is deleted from the Work Sites pane.
3. Click Apply to save your changes.

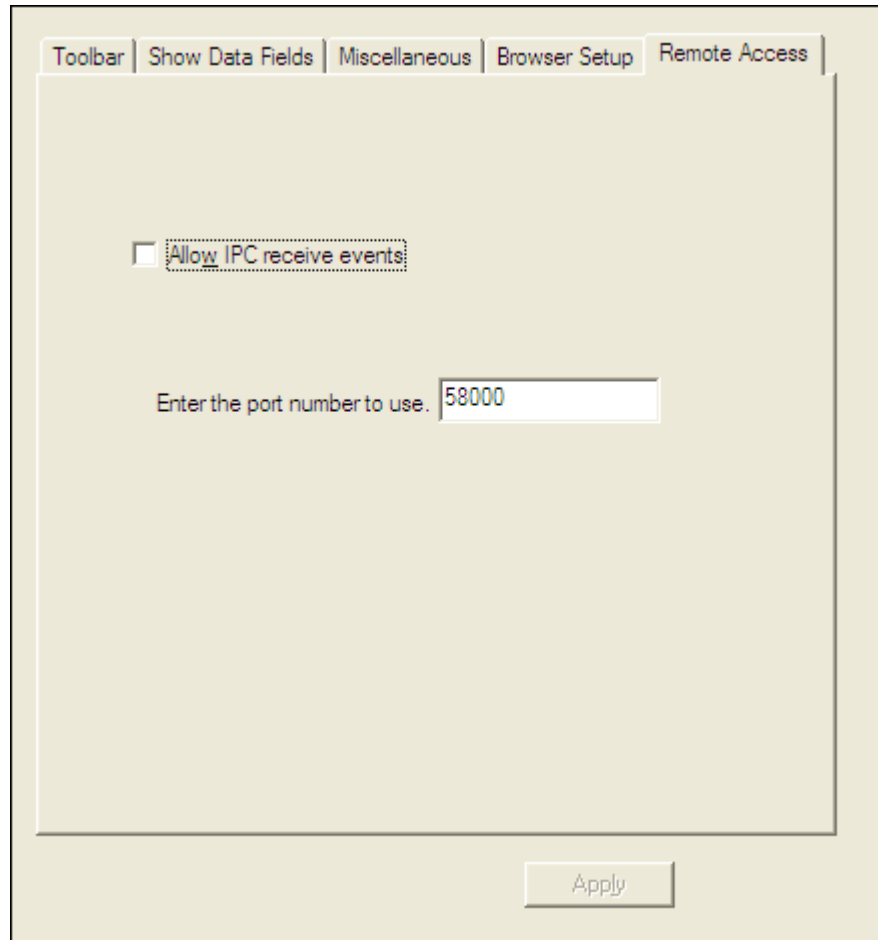
## **Remote Access**

The Remote Access tab ([Figure 38](#)) is used to enable the IPC Receive Event feature and configure the port used by the feature. The IPC Receive Event feature is available in the Enhanced and Premium bundles only.



**NOTE:** The Remote Access feature is not available for CAD-BE.

Figure 38. Remote Access tab

The image shows a screenshot of a software window with a tabbed interface. The tabs at the top are 'Toolbar', 'Show Data Fields', 'Miscellaneous', 'Browser Setup', and 'Remote Access'. The 'Remote Access' tab is currently selected. Inside this tab, there is a checkbox labeled 'Allow IPC receive events' which is currently unchecked. Below this checkbox, there is a text label 'Enter the port number to use.' followed by a text input field containing the value '58000'. At the bottom right of the window, there is an 'Apply' button.

An IPC Receive Event occurs when a third party application sends a message to Agent Desktop over a UDP socket. These messages must adhere to a predefined XML schema (see examples below) and cannot exceed 4000 bytes.

Unlike work flow actions, IPC Receive Event actions do not require configuration or setup in Desktop Administrator. All attributes that IPC Receive Event actions require in order to execute are a part of the IPC Receive Event message content. All incoming IPC Receive Event messages must adhere to a strict predefined XML schema. The required schemas are defined below.

When Agent Desktop receives an IPC Receive Event message, it does not send a reply back. IPC Receive Events are queued so no messages are lost.

By default, IPC Receive Events are disabled. The default port number is Port 58000.

**NOTE:** The Remote Access action provides for receiving an asynchronous event. Even if the event is solicited by an IPC Action request being sent out, the request may never be delivered, and there is no assurance that a response will arrive because of the nature of UDP.

Five actions are supported by the IPC Receive Event:

- [IPC Make Call Action \(page 82\)](#)
- [IPC High Priority Chat Action \(page 82\)](#)
- [IPC Record Action \(page 83\)](#)
- [IPC Agent Notification Action \(page 83\)](#)
- [IPC Set Variable Action \(page 84\)](#)

### IPC Make Call Action

For the IPC Make Call action to be successful:

- The agent must be in the Not Ready state
- There can be no call appearance present in Agent Desktop
- The Make Call dialog box must be closed (if it is open, the action will close it)

The message sent to Agent Desktop must conform to this XML format. **Bold** text indicates a variable that must be replaced with your own values.

```
<?xml version="1.0"?>
<!-- IPC Receive Event Message -->
<IPCActions>
  <IPCMakeCallAction>
    <ActionName>IPC Make Call Action</ActionName>
    <PhoneNumber>2961</PhoneNumber>
    <DisplayError>true</DisplayError>
  </IPCMakeCallAction>
</IPCActions>
```

### IPC High Priority Chat Action

For the IPC High Priority Chat action to be successful, the agent must be logged in.

The message sent to Agent Desktop must conform to this XML format. **Bold** text indicates a variable that must be replaced with your own values.

```
<?xml version="1.0"?>
<!-- IPC Receive Event Message -->
<IPCActions>
```

```

        <IPCHighPriorityChatAction>
            <ActionName>IPC High Priority Chat
Action</ActionName>
            <MessageText>Need help from
supervisor</MessageText>
        </IPCHighPriorityChatAction>
    </IPCActions>

```

### IPC Record Action

For the IPC Record action to be successful:

- A call appearance must be present in Agent Desktop
- The call must be connected, on hold, or conferenced
- The call must be the first call appearance listed in Agent Desktop

The message sent to Agent Desktop must conform to this XML format. The action supports two commands: **start** and **stop**.

```

<?xml version="1.0"?>
<!-- IPC Receive Event Message -->
<IPCActions>
    <IPCRecordAction>
        <ActionName>IPC Record Action</ActionName>
        <Command>start</Command>
        <DisplayError>>true</DisplayError>
    </IPCRecordAction>
</IPCActions>

```

### IPC Agent Notification Action

For the IPC Agent Notification action to be successful, the agent must be logged in.

The message sent to Agent Desktop must conform to this XML format. **Blue** text indicates a variable that must be replaced with your own values.

```

<?xml version="1.0"?>
<!-- IPC Receive Event Message -->
<IPCActions>
    <IPCAgentNotificationAction>
        <ActionName>IPC Agent Notification
Action</ActionName>
        <MessageText>Go to Not Ready state!</MessageText>
    </IPCAgentNotificationAction>
</IPCActions>

```

## IPC Set Variable Action

For the IPC Set Variable action to be successful, the agent must be logged in.

The IPC Set Variable action receives data values (for example, Cisco Outbound Dialer variables prefixed with "BA") from a third party application in UDP format. The action sends these data values to the CTI server.

All variables (ECC variables, call variables, and Outbound Dialer variables) can be set with this action.

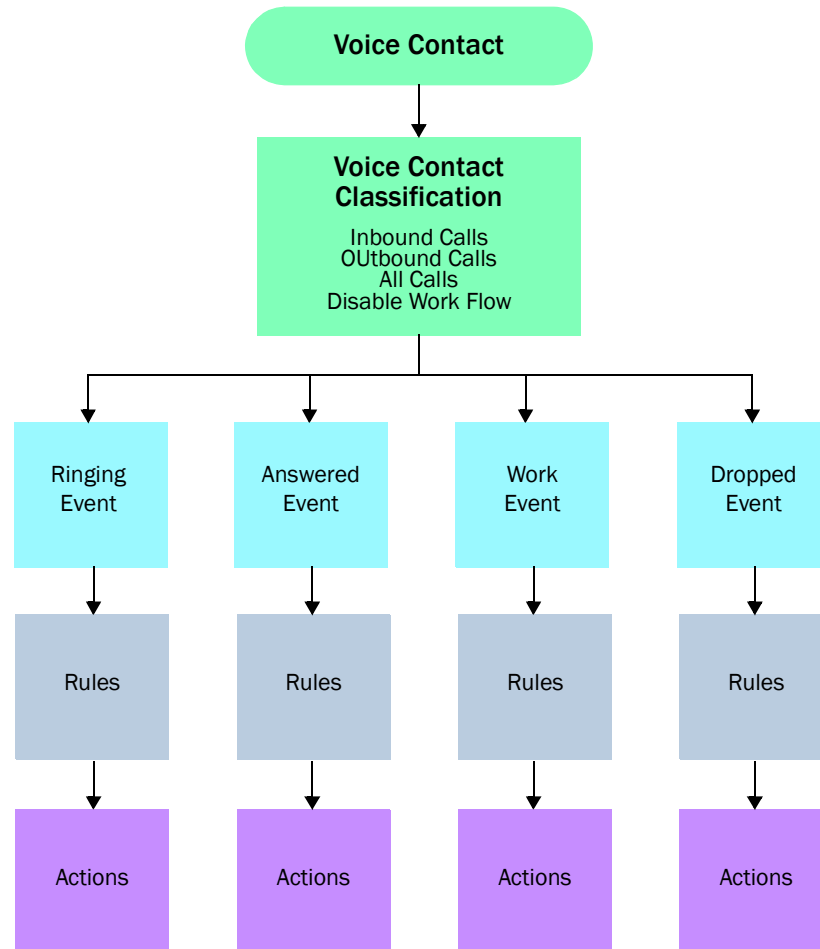
The message sent to Agent Desktop must conform to this XML format. **Bold** text indicates a variable that must be replaced with your own values.

```
<?xml version="1.0"?>
<!-- IPC Receive Event Message -->
<IPCActions>
  <IPCSetVariableAction>
    <ActionName>IPC Set Variable Action</ActionName>
    <Variable>BAResponse</Variable>
    <DataValue>03/05/2009 05:45</DataValue>
  </IPCSetVariableAction>
</IPCActions>
```

## Voice Contact Work Flows

Voice contact work flows manage agent activity based on voice call events. Once a call is classified it is further filtered according to events, rules, and actions. Voice contact work flows are available to Agent Desktop and CAD-BE agents.

Figure 39. Voice Contact Work Flows flow chart



For example, a voice contact work flow could be set up as follows:

1. A call comes into the contact center and is routed to an agent in the Ready state.

2. The Voice Contact Classification filter determines which work flow to select. It examines the inbound call's enterprise data (original dialed number) and determines that it is a call for Product A technical support and thus meets the data conditions of Work Flow 1. The call is now subject to the second layer of filtering set up in Work Flow 1.
3. Work Flow 1 says that any ringing event on the Product A support line triggers an HTTP action. This action takes the customer-entered account information from the IVR (part of the call's enterprise data) and pops a web page in Agent Desktop's or CAD-BE's integrated browser that displays the customer's account information to the agent.
4. The agent answers the phone call and is ready to assist the customer.

## Creating a Voice Contact Work Flow

The general procedure for creating a voice contact work flow is as follows:

1. Set up a new voice contact classification filter:
  - a. Select the type of call the work flow applies to—inbound, outbound, or all calls.

**NOTE:** An Outbound Dialer customer call can appear as inbound or outbound. Therefore, when creating an Outbound Dialer work flow, select **all calls** as your voice classification filter.

  - b. If required, further classify the call by specifying it must meet various data field conditions.
2. Set up the second level of filtering:
  - a. Select the call or agent state event—Ringing, Answered, Work, or Dropped.
  - b. If required, set up one or more rules with data field conditions that the call must meet.
  - c. Set up one or more actions that will take place if the call or agent event meets the rules' data field conditions.
3. Set up as many second level filters as needed for calls selected by the first level filter. You can set up rules and actions for each of the filtered call's call or agent events.

**NOTE:** It is possible to set rules and conditions that are contradictory so that a work flow cannot function. Desktop Work Flow Administrator does not check a work flow's logic and validity. If a work flow fails to operate as expected, make sure that the rules and conditions you set up are logically valid.

### Setting Up a New Voice Contact Classification

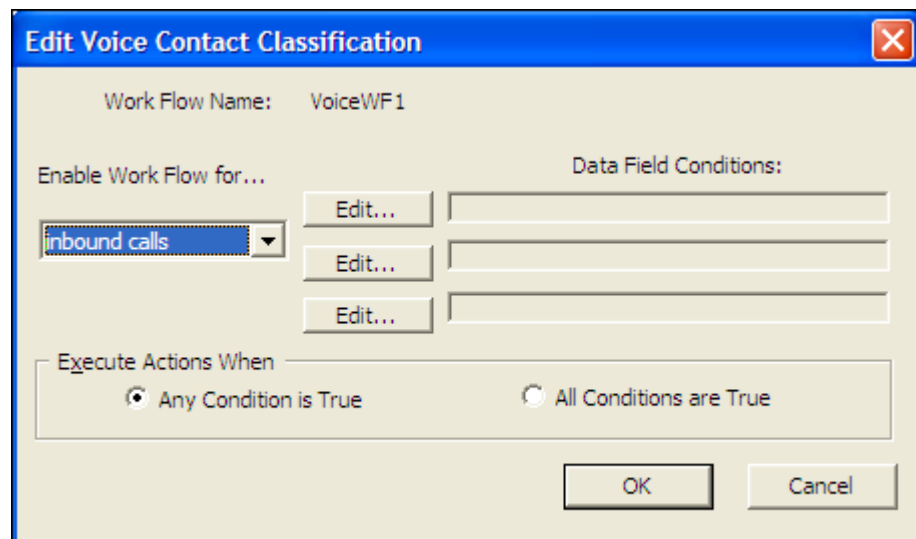
When you select the Voice Contact Work Flow node in the navigation tree, the Voice Contact Work Flow List window is displayed. This window shows all the existing voice contact work flows, and enables you to edit them or to set up new ones.

The Voice Contact Classification is the first level of filtering in a voice contact work flow.

#### *To set up a new voice contact classification:*

1. In the Voice Contact Work Flow List window, click Add. The New Work Flow Name dialog box is displayed.
2. Enter a name for your new voice contact work flow, and then click OK. The Edit Voice Contact Classification dialog box appears (Figure 40). Note that the work flow name you just created is shown in the dialog box.

Figure 40. Edit Voice Contact Classification dialog box



3. Set up the criteria for the first level filter in this dialog box.
  - a. Select the type of call you want the filter to apply to from the drop-down list: inbound calls, outbound calls, or all calls.

Note that there is also the option to disable the work flow. You can select this option later on if and when you want to disable the work flow, but want to keep the work flow on file for use at a later date.
  - b. Apply up to three data field conditions. Click Edit to display the Data Field Condition dialog box. For information on setting up a data field condition, see [“Data Field Conditions” on page 89](#).

- c. Select if you want the filter to apply when ALL conditions are true, or if ANY conditions are true.
4. Click OK to complete setting up the first level filter in the new voice contact work flow.

### Setting Up a New Work Flow

After a new voice contact classification is created, Desktop Work Flow Administrator takes you to the Voice Contact Work Flow window (Figure 39). In this window you set up the second level of filtering, consisting of events and rules, and the resulting actions for your new voice contact work flow.

Figure 41. Voice Contact Work Flow window

When an event occurs, the rules associated with the event are evaluated in the order they are listed in the Rules pane. When a rule is met, the actions associated with that rule are executed in the order they are listed in the Actions pane. Subsequent rules are not evaluated.

If no rules are met, the default rule governs, and all actions associated with the default rule are executed. Default rules cannot be changed or deleted.



The default action might be <no action>.

**To set up a new work flow:**

1. Select the event that triggers the work flow from the Event pane. The available events are:
  - Ringing. The agent's phone rings.
  - Answered. The agent answers the phone.
  - Dropped. The call is terminated.
  - Work. The agent transitions to the Work agent state.
2. Under the Rules pane, click New to set up a new rule. The New Rule Name dialog box appears.
3. Enter the name of the new rule, and then click OK. The fields in the Current Rule Conditions section of the window are enabled.
4. Add up to 3 data field conditions (see [“Data Field Conditions” on page 89](#) for more information) and specify when the actions should be executed—when any one of the data field conditions is met, or when all of the data field conditions are met.

When a data field condition is established, the Enable Rule check box is automatically selected.

**NOTE:** You cannot use a route point phone number when configuring a rule for inbound ACD calls.

5. Under the Actions pane, click Add to choose one or more actions to run when the event occurs and the rules are met.

You can select an existing action, or create a new action. If the action you select cannot be associated with the event, you will receive an error message. See [“Actions” on page 98](#) for more information.

6. Repeat steps 1 through 5 for as many events as desired.
7. When you are finished associating events with rules and actions, click Apply to save the new voice contact work flow.

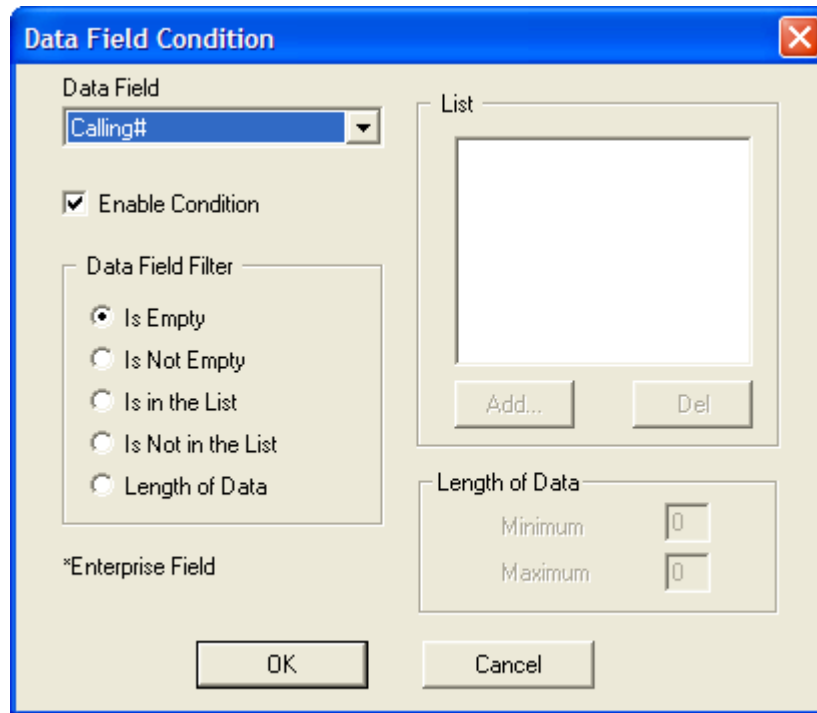
### Data Field Conditions

Data field conditions are criteria that a call's selected enterprise data fields must meet in order for a voice contact classification or a work flow rule to be enforced.

You can configure up to 3 data field conditions for a voice contact classification filter and for a work flow rule. You specify if all the data field conditions must be met (an AND statement) or if any of the data field conditions must be met (an OR statement).

To do this you use the Data Field Condition dialog box (for a voice contact classification) (Figure 42) or the Current Rule Conditions section of the Voice Contact Work Flow window (for a work flow rule).

Figure 42. Data Field Condition dialog box



**To set up data field conditions:**

1. In the Voice Contact Classification dialog box, click Edit. In the Voice Contact Work Flow window, add a new rule and then click Edit in the Current Rule Conditions section of the window.
2. Select a data field from the Data Field drop-down list.  
The Data Field lists all the enterprise data fields used in your system.  
Not all data fields are available for all events, for instance, Calling# and Called# are not available for the Ringing event.
3. Specify one of the data field filters:
  - Is Empty. There is no data in the data field.
  - Is Not Empty. There is data in the data field.

- Is In the List. The data field is compared to the list you set up in the List pane to determine if it is in that list. Click Add to add an item to the list of strings. Strings are not case sensitive. You can use wild cards (\*) and (?) to simplify your list. See [“Wild Card Searches” on page 91](#).
  - Is Not in the List. The data field is compared to the list you set up in the List pane to determine if it is not in that list. Click Add to add an item to the list of strings. Strings are not case sensitive. You can use wild cards (\*) and (?) to simplify your list. See [“Wild Card Searches” on page 91](#).
  - Length of Data. The length of the data field is between a minimum and maximum number of characters that you set.
4. Ensure that the Enable Condition check box is selected, and then click OK.

### Wild Card Searches

You can use wild cards when entering strings in the data field conditions list pane. This enables you to avoid having to enter many strings if the strings you want to list have common elements.

Wild card characters used are the asterisk (\*) and the question mark (?).

An asterisk in a string replaces any quantity of characters, as long as the other characters in the string match. For instance, ABC\* matches strings that begin with ABC but end in any quantity of any characters.

A question mark in a string replaces any character, but the length of the string must be exactly as represented. For instance, ABC?? matches strings that begin with ABC and end in 2 other characters.

Double quotes around a string searches for the exact characters within the double quotes, including the wild card characters (\*) and (?). For instance, “123\*ABC” matches only the string 123\*ABC, and does not allow the asterisk to act as a wild card.

## Modifying a Voice Contact Work Flow

You can modify the default work flow and any custom work flows you create.

**NOTE:** The classification filter for the Default work flow is Inbound Calls. This cannot be changed.

### *To modify a voice contact work flow:*

1. From the Voice Contact Work Flow List, select the work flow you want to modify, and then click Edit.
  - If you selected a custom work flow, the Edit Voice Contact Classification dialog box appears.

- If you select the default work flow, the Voice Contact Work Flow window appears. The default work flow does not classify voice contacts, and so bypasses the Edit Voice contact Classification dialog box.
2. Modify the voice contact classification if desired, and then click OK to proceed to the Voice Contact Work Flow window.
  3. Modify the work flow as desired, and then click Apply to save your changes.

## Deleting a Voice Contact Work Flow

You can delete any custom work flow you create. You cannot delete the default work flow.

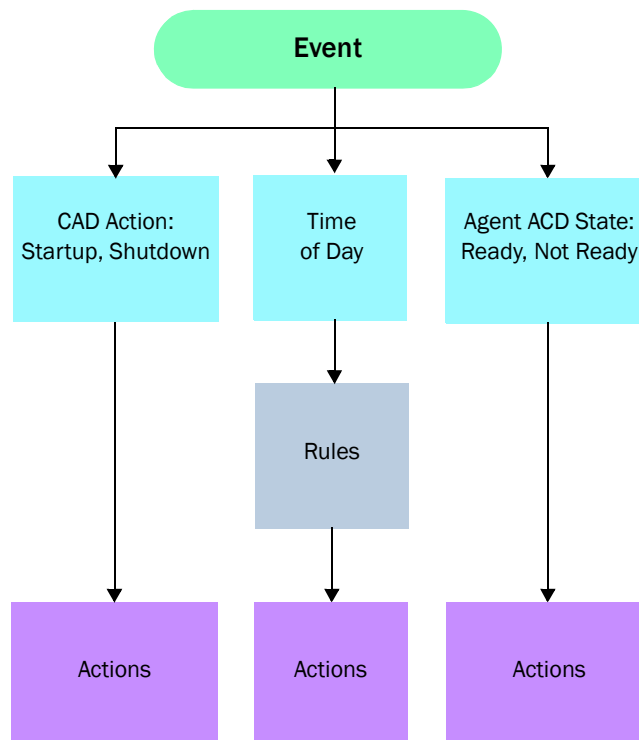
### *To delete a voice contact work flow:*

1. From the Voice Contact Work Flow List, select the work flow you want to delete, and then click Delete. A popup window appears asking you to confirm you want to delete the work flow.
2. Click OK to confirm the deletion.

## Agent Management Work Flows

Agent management work flows manage agent activity based on Agent Desktop and CAD-BE activity, agent ACD states, and time of day. The work flows follow the event—rule—action behavior used by voice contact work flows. There is a major difference—there is no initial filtering similar to the voice contact classification applied to voice contacts.

Figure 43. Agent Management Work Flows flow chart



For example, agent management work flows could be set up as follows:

- Every work day at 4:30, agents receive a popup message reminding them to complete their time cards.
- Whenever Agent Desktop starts up, Notepad is launched on the agent's desktop.
- Whenever an agent enters the Ready state, the customer database is launched.

## Creating an Agent Management Work Flow

The general procedure for creating an agent management work flow is as follows:

1. Select the event that triggers the work flow.
2. If the event is time of day, set up a rule with one or more data conditions that the event must meet.

**NOTE:** It is possible to set rules and conditions that are contradictory so that a work flow cannot function. Desktop Administrator does not check a work flow's logic and validity. If a work flow fails to operate as expected, make sure that the rules and conditions you set up are logically valid.

3. Set up one or more actions that will take place whenever the event occurs, or, if a time of day event, whenever the rule is met.

When you select the Agent Management Work Flow node, the Work Flow window appears ([Figure 44](#)).

**Figure 44.** Work Flow window

The screenshot shows the 'Work Flow' configuration window. It has three main panes at the top: 'Events', 'Rules (of current Event)', and 'Actions (of current Rule)'. The 'Events' pane lists 'Startup', 'Shutdown', 'Ready', 'Not ready', and 'Time of day' (which is highlighted). The 'Rules' pane lists 'EndOfShift' and '<Default>'. The 'Actions' pane lists 'TimeCardReminder'. Below each pane are 'New...', 'Del...', 'Add...', 'Edit...', and 'Del...' buttons. The 'Current Rule Conditions' section is expanded for the 'EndOfShift' rule. It contains an 'Enable Rule' checkbox that is checked, with an 'Edit...' button next to it. Below this is a 'Data Field Conditions' section with three text input fields: the first contains '04:30 PM Monday,Tuesday,Wednesday,Thur', the second contains 'Hook state On hook', and the third is empty. At the bottom of this section are two radio buttons under the heading 'Execute Actions When': 'Any Condition is True' (unselected) and 'All Conditions are True' (selected). An 'Apply' button is located at the very bottom of the window.

Unlike rules in voice contact work flows, rules in agent management work flows can be applied only to a time of day event, not to all events.

Not all actions are available for agent management work flows. See [“Action Availability” on page 99](#) for more information.

***To set up a CAD activity or agent state work flow:***

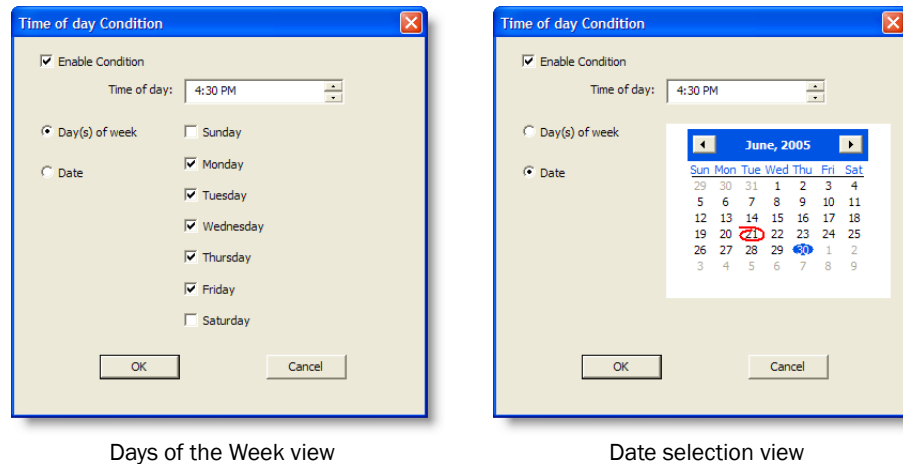
1. Select the event that triggers the work flow from the Event pane. The available events are:
  - Startup. Agent Desktop/CAD-BE starts.
  - Shutdown. Agent Desktop/CAD-BE closes.
  - Ready. The agent transitions to the Ready state.
  - Not Ready. The agent transitions to the Not Ready state.
2. Under the Actions pane, click Add to choose one or more actions to run when the selected event occurs. You can select an existing action, or create a new action. See [“Actions” on page 98](#) for more information.
3. Repeat steps 1 and 2 for as many events as desired.
4. When you are finished associating events with actions, click Apply to save the agent management work flow.

***To set up a time of day work flow:***

1. Select the Time of day event from the Event pane.
2. Under the Rules pane, click New to set up a new rule. The New Rule Name dialog box appears.

3. Enter the name of the new rule, and then click OK. The fields in the Current Rule Conditions section of the window are enabled, and the Time of Day Condition dialog box appears (Figure 45).

**Figure 45. Time of Day Conditions dialog box**



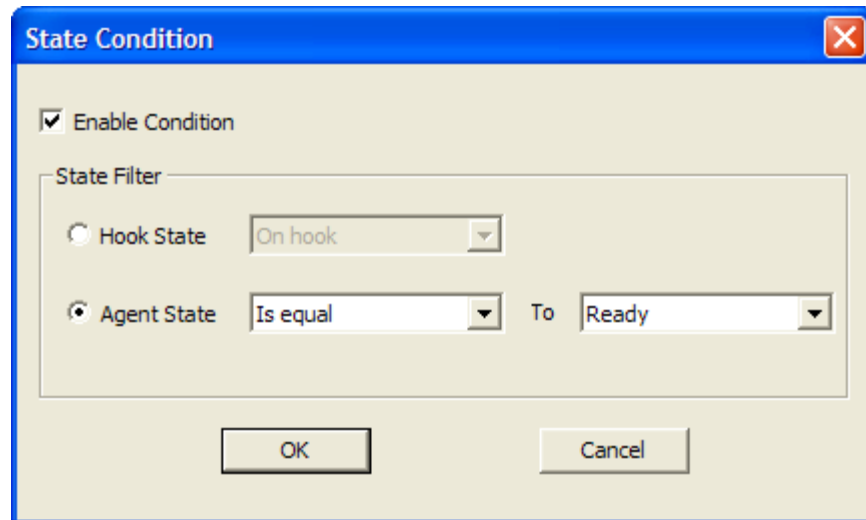
4. Set up the day or date conditions for the rule, and then click OK.
  - a. To specify that an action takes place every week on certain days or at a certain time, select Day(s) of the week and then select the desired days. You must specify a time of day as well.
  - b. To specify that an action takes place on a specific date, select Date, and then select the desired date from the calendar. Today's date is circled in red. You must specify a time of day as well.

The condition you set up is automatically entered in the first Data Field Conditions line in the Current Rule Conditions section of the Work Flow window, and the Enable Rule check box is automatically selected.



5. Click Edit next to the 2 remaining Data Field Conditions fields to display the State Condition dialog box (Figure 46), and further define the rule, if desired:
  - Specify if the agent is on hook or off hook
  - Specify if the agent state is or is not equal to Ready or Not Ready

Figure 46. State Condition dialog box



6. Under the Actions pane, click Add to choose one or more actions to run when the event occurs and the rules are met.

You can select an existing action, or create a new action. See [“Actions” on page 98](#) for more information.
7. Click Apply to save the new time of day work flow.

## Actions

---

Actions are stored independently of events and rules. You can use an action in more than one event, and you can assign actions to more than one task button in Agent Desktop and CAD-BE.

While actions are processed, events are queued. It is generally a good idea to avoid long actions.

**Table 12.** Action types and descriptions

Action Type	Description
<a href="#">Importing and Exporting Actions (page 101)</a>	Displays a popup message on the agent's desktop
<a href="#">Agent Notification Action (page 105)</a>	Displays a custom message popup window on the agent's desktop when a certain event occurs
<a href="#">Agent State Action (page 107)</a>	Sets an agent state
<a href="#">Call Control Action (page 109)</a>	Answers, drops, conferences, transfers, or makes a call, or inputs touch tones during a call
<a href="#">Delay Action (page 110)</a>	Inserts delay time in series of actions
<a href="#">HTTP Action (page 111)</a>	Enables the Agent Desktop and CAD-BE integrated browser to interact with a web application
<a href="#">IPC Action (page 119)</a>	Passes enterprise data or user-defined data from the agent desktop to a custom third-party application
<a href="#">Launch External Application Action (page 121)</a>	Starts a third-party application
<a href="#">Run Macro Action (page 123)</a>	Plays back a recorded sequence of keystrokes.
<a href="#">Set Enterprise Data Action (page 134)</a>	Automatically changes an enterprise data field in Agent Desktop to a selected desktop variable or static text
<a href="#">Timer Action (page 136)</a>	Triggers actions after a specified time has elapsed
<a href="#">Utility Action (page 137)</a>	Run a utility, such as start and stop recording or sending a predefined, high-priority chat message to a supervisor

## Action Availability

Not all actions are available for all events or for all types of agents. [Table 13](#) shows which actions are available for the three types of work flows and for each type of agent (CAD agents and CAD-BE agents).

**Table 13.** Action availability per work flow type and agent type \*

Action Type	Voice Contact		Agent Mgmt		Time of Day	
	CAD	CBE	CAD	CBE	CAD	CBE
Agent Notification	x	—	x	—	x	—
Agent State	x	—	—	—	x	—
Call Control	x	—	—	—	—	—
Delay	x	—	x	—	—	—
HTTP	x	x	x	—	x	—
IPC	x	—	x	—	—	—
Launch External Application	x	—	x	—	—	—
Run Macro	x	—	x	—	—	—
Set Enterprise Data	x	—	—	—	—	—
Timer	x	—	—	—	—	—
Utility	x	x	—	—	—	—

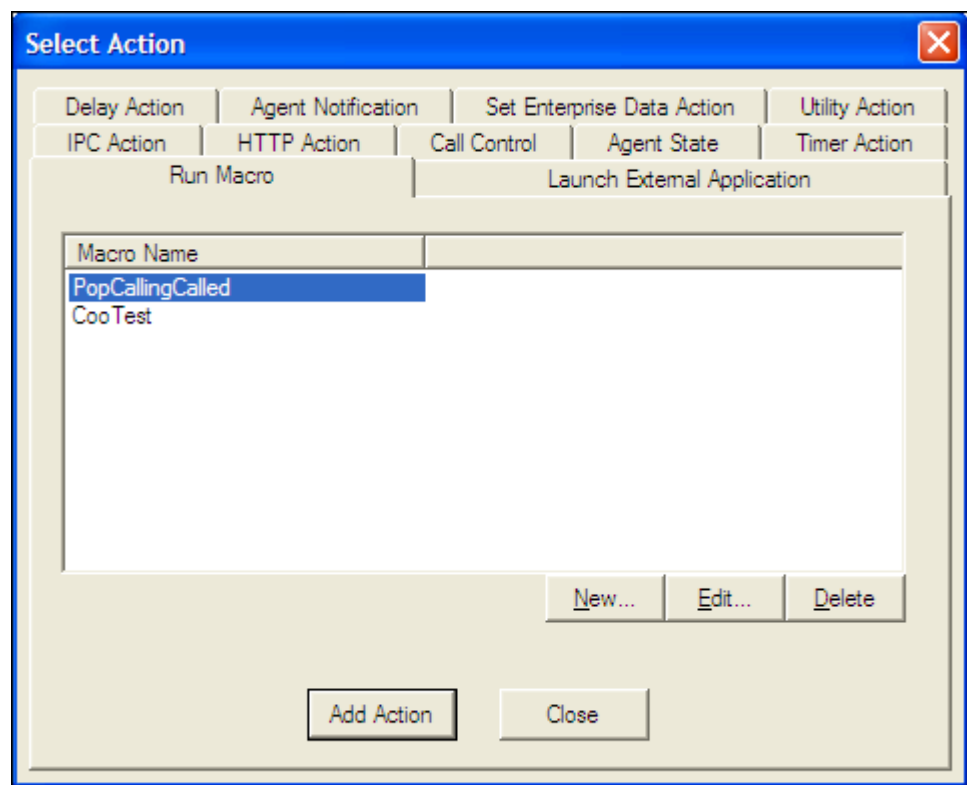
\* “x” indicates the action is available: “—” indicates the action is not available.

## Adding a New Action

*To add a new action:*

1. Access the Voice Contact Work Flow or Agent Management Work Flow window.
2. Select the event to be associated with the new action.
3. Under the Actions pane, click Add. The Select Action dialog box appears (Figure 47).

Figure 47. Select Action dialog box



4. Choose the tab for the type of action you want to associate with the event.
5. If the action already exists, select it, and then click Add Action.  
If the action does not yet exist, click New and follow the instructions for setting up that type of action as outlined below.
6. Click Add Action. The Select Action dialog box closes and you return to the Work Flow window. The new action is listed in the Actions pane.

## Editing an Action

### *To edit an action:*

1. In the Work Flow window, select the appropriate event, and then select the action you want to edit from the Actions pane.
2. Click Edit. The edit dialog box for that action appears.
3. Make your changes, and then click OK. The action is now changed.

## Deleting an Action

To permanently delete an action, you must first delete it from any event it is associated with, and then delete the action itself.

### *To permanently delete an action:*

1. In the Work Flow window, select each event. If the action you want to delete is associated with that event, select the action in the Action pane and then click Delete to remove it from that event. The action is now removed from all events.
2. Under the Actions pane, click Add. The Select Actions dialog box appears.
3. Choose the appropriate tab, and then select the action you want to delete.
4. Click Delete. The action is deleted.
5. Click Close. The Select Action dialog box closes and you return to the Work Flow window.

## Importing and Exporting Actions

You can export actions associated with a specific work flow group and import them to other work flow groups. The actions are exported to any location you choose, locally or on a network drive.

**NOTE:** If you export actions to the default location (C:\Program Files\Cisco\Desktop\config\Action) they will be lost in the event that a client desktop is reinstalled. To avoid this, choose a location other than the CAD installation directory.

The actions you export can also be imported by other instances of Desktop Work Flow Administrator, belonging to your system or any other system, as long as those instances are the same version of Desktop Work Flow Administrator and can access the file storage folder.

Types of actions that can be exported and imported are:

- Run Macro action
- HTTP action
- IPC action
- Launch External Application action

The rules and events associated with the actions are not part of this function and cannot be exported or imported.

You can export only one action at a time. For example, if there are five actions you want to export from a work flow group, you must export each action individually.

You can add a description (limited to 255 characters) to the exported action for easier identification when importing to another work flow group.

If an imported action has the same name as an action already present in the work flow group, you will be prompted to rename the imported action.

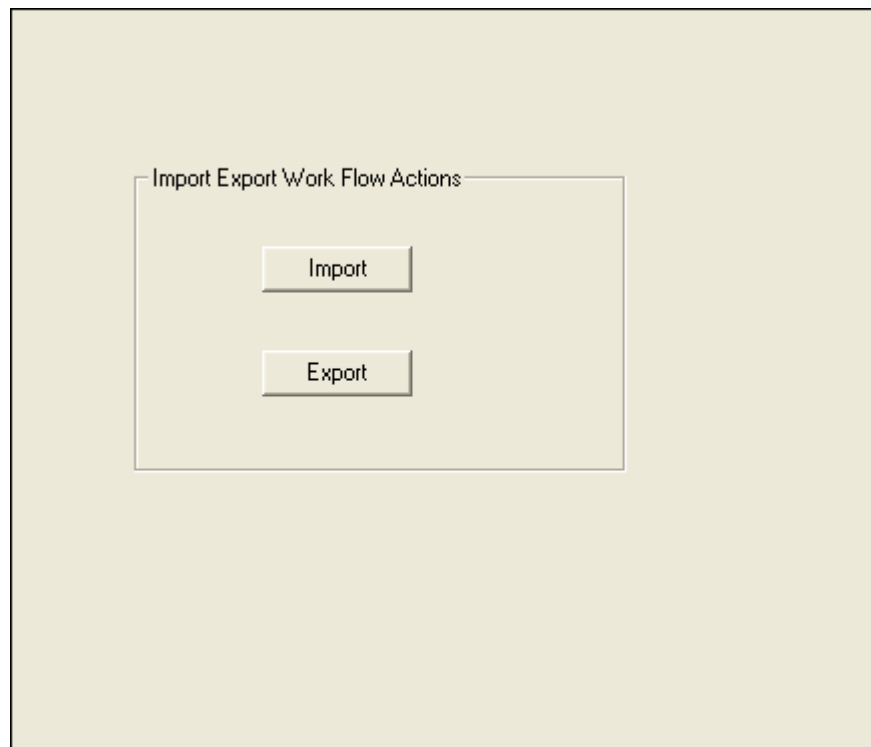
***To export a work flow action:***

1. Select the work flow group whose action you want to export.

The Import Export Work Flow Actions window appears ([Figure 48](#)).

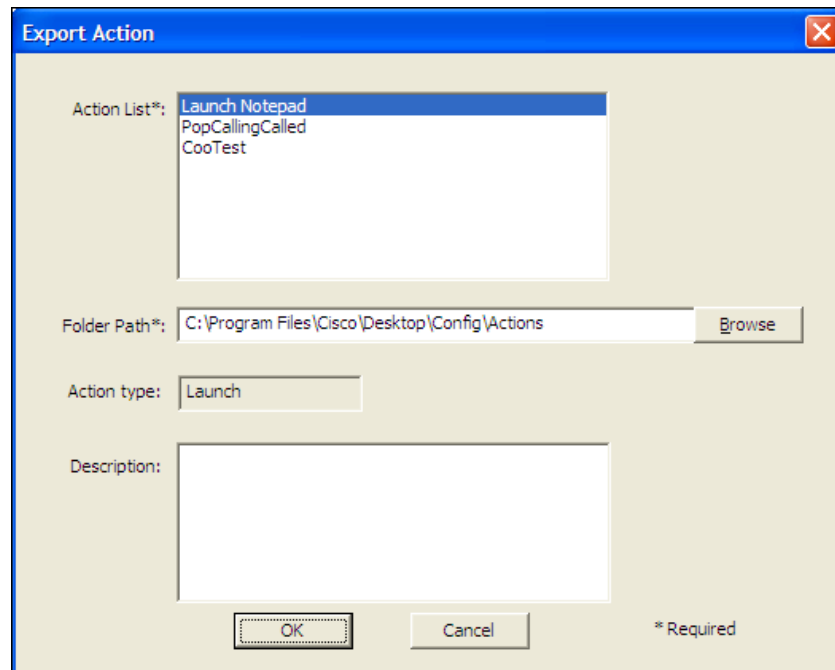
If there are actions available for import and/or export, the Import and/or Export button is enabled. If there are no actions available for the specific action, that button is disabled.

**Figure 48.** Import Export Work Flow Actions window



2. Click Export. The Export Action dialog box appears (Figure 49).

Figure 49. Export Actions dialog box



3. Select the action you want to export from the Action List, and then complete the fields in the dialog box:
  - Folder Path: Select the default path shown or browse to any other local or network folder location.
  - Description (optional): Enter a description of the action. Maximum length of the description is 255 characters.
4. Click OK.

**To import a work flow action:**

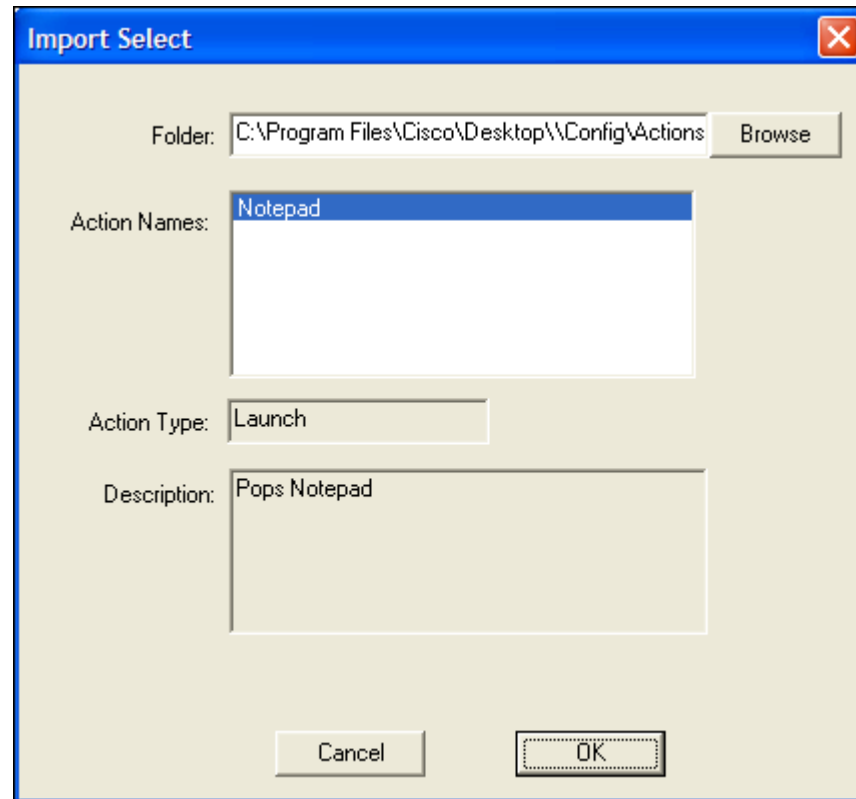
1. Select the work flow group to which you want to import an action.

The Import Export Work Flow Actions window appears (Figure 48).



2. Click Import. The Import Select dialog box appears (Figure 50).

Figure 50. Import Select dialog box



3. Navigate to the folder where actions are stored. The field is autofilled with the default path.
4. From the Action Names list, select the action you want to import to the work flow group. You can import only one action at a time.
5. Click OK.

### Agent Notification Action

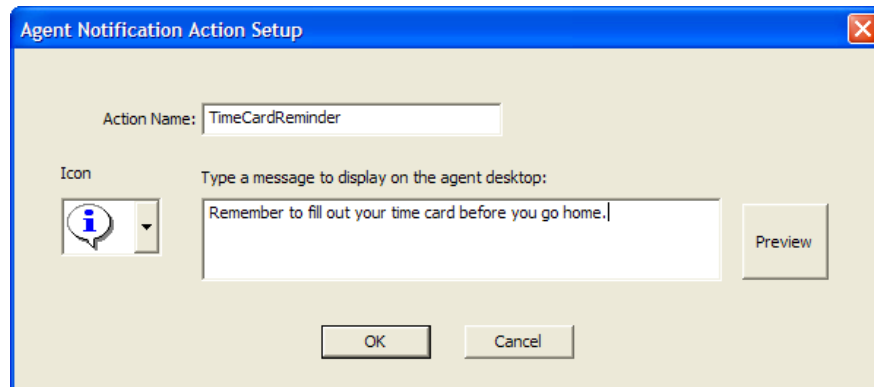
An Agent Notification action displays a custom message popup window on the agent's desktop when a certain event occurs. For instance, when an agent logs out, a popup window reminding the agent to complete his time card could pop up on his desktop.

#### *To set up an Agent Notification action:*

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.

2. Select the Agent Notification tab, and then click New. The Agent Notification Action Setup dialog box appears (Figure 51).

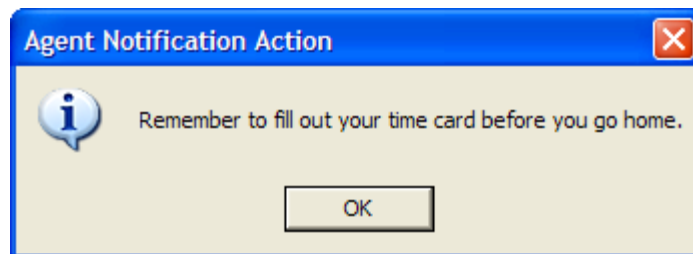
Figure 51. Agent Notification Action Setup dialog box



3. Enter an action name, select the icon you want to appear in the popup window, and then type your message.
4. Click Preview to see what the popup window will look like (Figure 52).

**NOTE:** The title bar on the actual popup window might contain truncated text, because Windows automatically adds “Cisco Agent Desktop” to the beginning of the title bar text, and the popup window does not resize.

Figure 52. Preview of an Agent Notification popup window



5. Click OK.

## Agent State Action

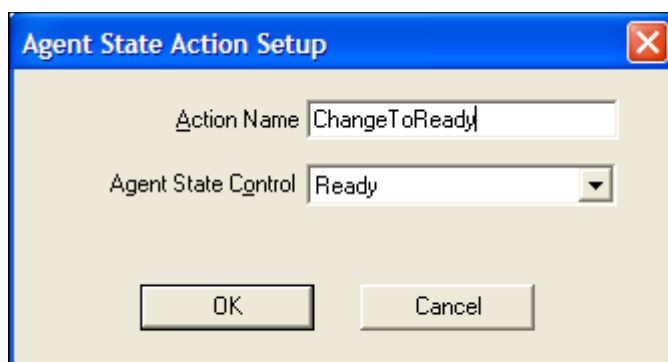
An Agent State action enables you to select an agent state to associate with an event.

Agent State actions can be associated only with Answered and Dropped events. The only valid agent states are Login, Logout, Ready, Not Ready, and Work.

### *To set up an Agent State action:*

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.
2. Select the Agent State tab, and then click New. The Agent State Action Setup box appears ([Figure 53](#)).

Figure 53. Agent State Action Setup dialog box



3. Enter a name for the action, select the agent state control from the drop-down list, and then click OK.

### **Automated Reason Codes for Agent State Changes**

You can enable automated reason codes when you set up an agent state action for transitioning to Logout or Not Ready.

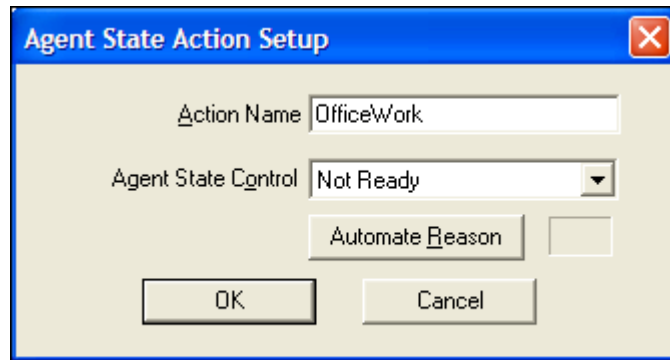
If you enable automated reason codes, the agent does not have to choose the appropriate reason code when an agent state action to transition to Logout or Not Ready is triggered.

### *To enable automated reason codes*

1. Set up a new Agent State action (see [“Agent State Action” on page 107](#)) or edit an existing Agent State action (see [“Editing an Action” on page 101](#)).

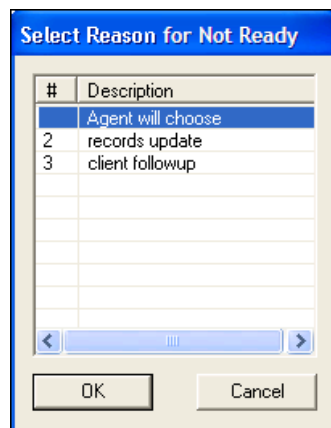
2. In the Agent State Action Setup dialog box, enter a name for the action, select either AgentNotReady or AgentLogout from the Agent State Control drop-down list. The Automate Reason button appears in the dialog box (Figure 54).

Figure 54. Agent State Action dialog box with Automate Reason button



3. Click Automate Reason. The Select Reason dialog box appears (Figure 55). This dialog box contains the reason codes already set up in the system.

Figure 55. Select Reason dialog box



4. Select the reason code you want to be entered automatically when the action is triggered, and then click OK.

The default is "Agent will choose." If you select this, the agent will have to manually enter the reason code.

The dialog box closes and the Agent State Action Setup dialog box is displayed, with the number of your chosen reason code entered in the gray box next to the Automate Reason button.

5. Click OK.

## Call Control Action

Call Control actions include:

- Blind transfer
- Supervised transfer
- Supervised conference
- Blind conference
- Call
- Answer
- Drop
- Touch tones

These actions can be associated with an event or a task button. For example, a task button could be configured to execute a call control action that blind transfers a call to the agent's supervisor.

The Blind Transfer call control action includes a configurable delay time, if one is needed. The Transfer Delay field is not enabled for any other call control action.

### To set up a Call Control action:

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.

Select the Call Control tab, and then click New. The Call Control Action Setup dialog box appears ([Figure 56](#)).

Figure 56. Call Control Action Setup dialog box

The image shows a Windows-style dialog box titled "Call Control Action Setup". It has a blue title bar with a red close button in the top right corner. The dialog box contains four input fields: "Action Name" with the text "AutoTransToSupervisor", "Call Control" with a dropdown menu showing "BlindTransfer", "Phone Number" with the text "2311", and "Transfer Delay (ms)" with the text "5000". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Action Name	AutoTransToSupervisor
Call Control	BlindTransfer
Phone Number	2311
Transfer Delay (ms)	5000

2. Enter the following information:

- A name for the call control action.
  - The type of action selected from the Call Control drop-down list.
  - A phone number if required by the type of action. For example, for Blind Transfer, enter the phone number to which a call is transferred.
  - (For Blind Transfer only) a delay time, in milliseconds, if needed to enable the person to whom the call is transferred to answer the transferred call.
3. Click OK.

**NOTE:** A blind conference call control action must be used in conjunction with rules. If no rules are configured, then the blind conference action occurs every time the event it is associated with occurs. For example, if you set up a blind conference action on an answered event and do not configure rules, it executes on every answered call. To prevent this, you must set up rules that allow the action to occur only when desired, such as only on incoming calls from the route point.

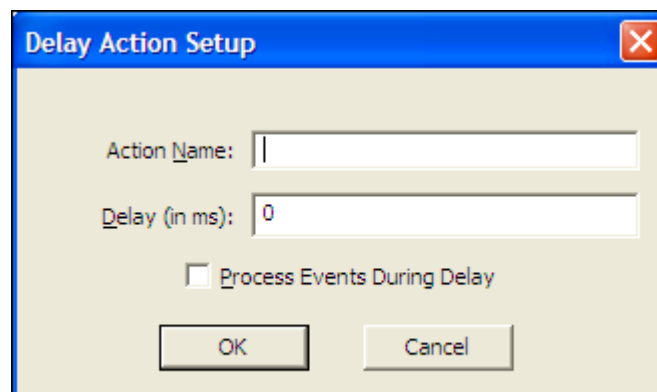
## Delay Action

Delay actions are used to add delay time between actions in a series of actions. For example, the delay action can be added to a work flow that includes a series of macros that need delay time between execution of those macros.

### *To set up a Delay action:*

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.
2. Select the Delay Action tab, and then click New. The Delay Action Setup dialog box appears ([Figure 57](#)).

**Figure 57.** Delay Action Setup dialog box



3. Enter the following information:
  - A name for the delay action
  - The length of delay time, in milliseconds
  - Select the Process Events During Delay check box if you want events to be processed in the background during the delay period
4. Click OK.

## HTTP Action

This action is available to Agent Desktop agents at the Premium level (Post and Get), and to CAD-BE agents at the Enhanced and Premium levels (Get only).

HTTP actions enable an agent to use call-based data to interact with a website or a web application in the Integrated Browser window.

For example, an HTTP action can be set up so the enterprise data of an incoming call is used to retrieve a customer record and display it in the Integrated Browser.

**NOTE:** For more information on HTTP requests and the HTTP protocol in general, see the website of the World Wide Web Consortium, [www.w3.org](http://www.w3.org).

**NOTE:** Keep in mind that a URL, including arguments, is limited by the HTTP service to a maximum of 2075 characters. If you create an HTTP action that results in a URL longer than that, it will not work correctly.

### *To set up an HTTP action:*

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.
2. Select the HTTP Action tab, and then click New. The HTTP Actions Setup dialog box appears ([Figure 58](#)).
3. Complete the HTTP Actions Setup dialog box as follows:

Field	Description
Action Name	Enter a name for the new action.
Protocol	Select the protocol to be used by the browser: http (default) or https.

Field	Description
Method	Select the http method to be used by the browser: GET (default, CAD and CAD-BE agents) or POST (CAD agents only).
Host	Enter the host name or IP address of the website. Do not include the http or https prefix.
Port	Enter the port (0–65535) that the host is listening on (for http the default is 80; for https, the default is 443).
Path	Enter the path portion of the URL (optional). Default is blank. Do not include a leading slash.
Browser Tab	<p>Select the browser tab in which you want the action results to be displayed. (For CAD-BE agents there is only 1 tab available so this field is not present.)</p> <p>If the tab you select is removed later, the action will be displayed in the first tab (ordinarily reserved for supervisor page push).</p>



Figure 58. HTTP Actions Setup dialog box

**HTTP Action Setup**

**URL**

Action Name

Protocol

Method

Host

Port

Path

Browser Tab

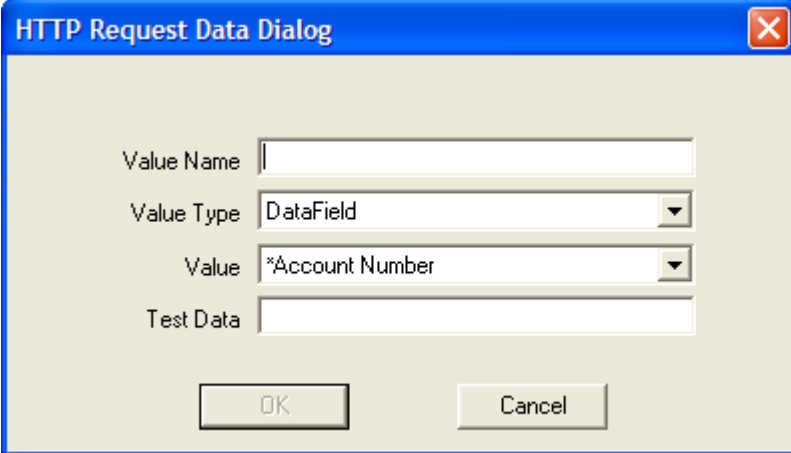
**Request Data**

Name	Value	Value Type	Test Data
------	-------	------------	-----------

**Preview**

- Click Add to display the HTTP Request Data dialog box (Figure 59). The fields added with this dialog box make up the query or post data portion of the request. The fields are optional and are blank by default.

Figure 59. HTTP Request Data dialog box



- Complete the HTTP Request Data dialog box as follows:

Field	Description
Value Name	Enter the name of the field in the web application.
Value Type	Select one of the following: <ul style="list-style-type: none"><li>DataField to use an enterprise data variable as the source of the data. This is inserted in the URL following the &lt;name&gt;=&lt;value&gt; format.</li><li>UserDefined to use a specific string entered in the Value field. This is inserted in the URL following the &lt;name&gt;=&lt;value&gt; format.</li><li>DataFieldOnly to insert any value selected from the Valuedrop-down list without following the &lt;name&gt;=&lt;value&gt; format.</li></ul>
Value	If you selected a value type of DataField or DataFieldOnly, select the enterprise data variable from the drop-down list. If you selected UserDefined, enter the value to be used.
Test Data	Enter a string of test data to simulate DataField or DataFieldOnly data. This field is enabled only if you select a Value Type of DataField or DataFieldOnly.

6. Continue to build your request using the Add, Edit, and Delete buttons as needed.
7. When you have completed building the request, click Preview to view the request. Note that Desktop Work Flow Administrator has added the special characters needed for a valid HTTP request.
  - If a path is specified and there is request data, there will be a “/” after the port and a “?” after the path.  
Example: `http://www.site.com:80/index.jsp?name=value`
  - If a path is not specified, there is request data, and the first request data is *not* DataFieldOnly, there will be a “?” after the port and no “/”.  
Example: `http://site.com:80?name=value`
  - If a path is not specified, there is request data, and the first request data is DataFieldOnly, there will be a “/” after the port and no “?”.  
Example: `http://www.site.com:80/value`
  - If a path is not specified, there is more than one request data, and the first request data is DataFieldOnly, there will be a “/” after the port and no “?”.  
Example: `http://www.site.com:80/value&value&value...`
8. When you are satisfied your request is correctly formatted, click Test to test it using the test data you entered when adding the request data.

### Reserved Characters

There are characters that must not be used in an HTTP request. These characters are listed in [Table 14](#).

**Table 14.** HTTP request reserved characters

Symbol	Description
&	Ampersand
@	At sign
\	Back slash
^	Carat
:	Colon
,	Comma
\$	Dollar sign
“	Double quote
=	Equal sign

**Table 14.** HTTP request reserved characters — *Continued*

Symbol	Description
!	Exclamation point
<	Left angle bracket
[	Left square bracket
%	Percent
+	Plus
#	Pound sign
?	Question mark
>	Right angle bracket
]	Right square bracket
;	Semicolon
'	Single quote
/	Slash

**Example of an HTTP Request**

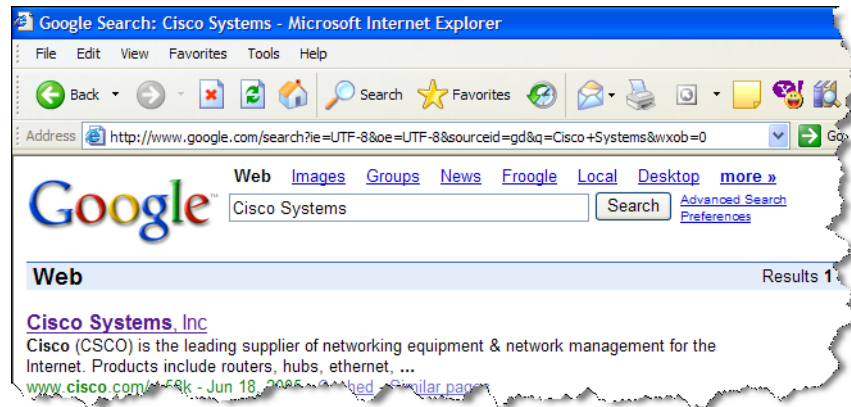
To illustrate how to create a basic HTTP request, we will write a request that uses the Google search engine to search the web for “Cisco Systems.”

***To learn what value names and values go into the Google search:***

1. Open your web browser and navigate to [www.google.com](http://www.google.com).

2. Type Cisco Systems in the search field and then click Google Search. The address bar shows the HTTP request we will create in Desktop Work Flow Administrator(Figure 60).

Figure 60. Google search results page



3. The Address bar shows this string:

`www.google.com/search?ie=UTF-8&oe=UTF-8&sourceid=gd&q=Cisco+Systems&wxob=0`

The portion of the string before the question mark is the host and the path. After that, all the request data is listed, separated by ampersands (&).

Name	Value
Host	www.google.com
Path	search
Request Data	ie=UTF-8
	oe=UTF-8
	sourceid=gd
	q=Cisco+Systems
	wxob=0

**To create the HTTP request:**

1. Complete the HTTP Actions Setup dialog box with the information you gathered from the manual Google search (Figure 61).

**Figure 61.** Google search information entered in the HTTP Action Setup dialog box

**HTTP Action Setup**

Action Name: GoogleSearch

URL

Protocol: http

Method: GET

Host: www.google.com

Port: 80

Path:

Browser Tab: HTTP Web Browser Tab 1

Request Data

Name	Value	Value Type	Test Data
ie	UTF-8	UserDefined	
oe	UTF-8	UserDefined	
sourceid	gd	UserDefined	
q	Cisco+Systems	UserDefined	
wxob	0	UserDefined	

Add... Edit... Delete

Preview

http://www.google.com:80/search?ie=UTF-8&oe=UTF-8&sourceid=gd&q=Cisco%2BSystems&wxob=0

Preview... Test

OK Cancel

The values are all user-defined. The value name is on the left side of the equal sign, and the value is on the right side of the equal sign.

Note that Google inserted a plus sign (+) between the words Cisco and Systems in the request string. You do not need to include that character in the HTTP Request Data dialog box. Desktop Work Flow Administrator will add an acceptable string to indicate the space between the words.

2. After you have entered the request data, click Preview to view the resulting request string.

It should be identical to the string displayed in the Google search results address bar. If you used a plus sign between the words Cisco and Systems, you will see "%2B" instead of the plus sign; if you used a space, you will see "%20". These strings indicate a space and are an acceptable substitute for the plus sign.

3. Click Test to test your HTTP request.

The request should open your browser, navigate to the Google Search page, and run a search for Cisco Systems.

## IPC Action

This action is available to Agent Desktop agents at the Premium level.

IPC actions pass information in the form of UDP (user datagram protocol) messages from the agent desktop to a third-party application using IPC (interprocess communication) methods. The third-party application can be located on the agent's PC or anywhere on the network.

**NOTE:** You must have a custom application written that listens for data sent to a specific IP address and port.

An IPC action is one-way—that is, when CAD sends data using an IPC action, it does not receive a response or any acknowledgement that the message was received by the recipient third-party application.

The data sent is enterprise data or user-defined data. It is sent in the format:

`valuenamename=value&name=value&name=value...`

### *To set up an IPC action:*

1. Set up a new action. See [“Adding a New Action” on page 100](#).  
The Select Action window appears.
2. Select the IPC Action tab, and then click New.

The IPC Action Setup dialog box appears (Figure 62).

Figure 62. IPC Action Setup dialog box

IPC Action Setup

Action Name:

Protocol:

IP Address:

Port:

Data

Name	Value	Value Type
------	-------	------------

Add... Edit... Del...

OK Cancel

3. Complete the IPC Action Setup dialog box as follows:

Field	Description
Action Name	Enter a name for the new action.
Protocol	The default (and only) protocol is UDP.
IP Address	Enter the IP address of the third-party application that will receive the data.
Port	Enter the port number the third-party application is listening on for data.

4. Click Add to display the IPC Request Data dialog box (Figure 63).



The fields added with this dialog box make up the query portion of the request.

**Figure 63.** IPC Request Data dialog box

5. Complete the IPC Request Data dialog box as follows:

Field	Description
Value Name	Enter the name of the field.
Value Type	Select DataField to use an enterprise data variable as the source of the data. Select UserDefined to use a specific string entered in the Value field.
Value	If you selected a value type of DataField, select the enterprise data variable from the drop-down list. If you selected UserDefined, enter the value to be used.

6. Continue to build your request using the Add, Edit, and Delete buttons as needed.
7. When you have completed building the request, click OK.

## Launch External Application Action

Launch External Application actions start a third-party application in a new window.

To ensure applications are running before macros attempt to use them, start them with launch actions assigned to the Startup event.

**NOTE:** An application started by a launch action must use the same path on the agent's PC as it does on the administrator's PC or it must be on a network drive, or the launch action will not be successful.

When using launch actions, Agent Desktop can pass parameters such as command line arguments in two ways.

The first method is to add parameters after the application path name. For example, the command to start Microsoft Excel and open a spreadsheet named mrmtest.xls is:

`"c:\program files\excel.exe" "c:\my documents\mrmtest.xls"`

**NOTE:** Program names and command line arguments that contain spaces must be in quotes so that they appear as one argument rather than as multiple arguments.

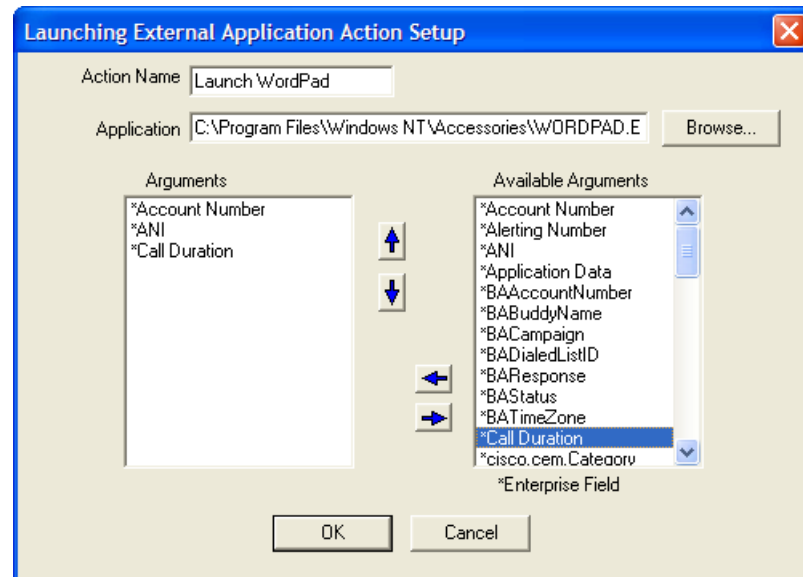
The second method involves passing data fields as arguments. You can pass any valid data field while launching an application. Note that if a launch action takes place on the Startup event, call data may not be present. Empty or blank data fields will contain the string <NULL>.

***To set up a Launch External Application action:***

1. Set up a new action. See ["Adding a New Action" on page 100](#). The Select Action window appears.

2. Select the Launch External Application Action tab, and then click New. The Launching External Application Action Setup dialog box appears (Figure 64).

**Figure 64.** Launching External Application Action Setup dialog box



3. Enter a name for the action and enter the path to the desired application's location. Make sure the application is located so that it is available to Agent Desktop at runtime.
4. Add any arguments you wish to pass to the application. Choose the desired argument in the Available Arguments list, and use the left arrow to add it to the Argument list. Use the up and down arrows to reorder the Argument list.
5. When you have finished entering information, click OK.

## Run Macro Action

A macro is a shortcut for a sequence of keystrokes. For example, you might record a macro that performs the following tasks with each incoming call:

1. Copy the ANI (Automatic Number Identification) from Agent Desktop to Microsoft Outlook
2. Open a contact list
3. Find the ANI in a database or spreadsheet
4. Display a screen containing the caller's account information

**NOTE:** Do not use a Run Macro action to perform tasks that can be accomplished by one of the other types of actions available. For

example, use a Call Control action to transfer a call, and an Agent State action to change agent states.

**NOTE:** Run Macro actions do not work correctly when Chinese and Korean characters (and potentially any multi-byte characters) are used.

### Macro Recording Tips

If your macro accesses a third-party application, make sure that the application is open. If the macro enters text into the third-party application, make sure that application has Windows focus.

Keystroke macros play back to the top level window they were recorded in. If you are running a keystroke macro to a Terminal Services window, you must make sure that the appropriate application in that Terminal Services window always has focus, otherwise the keystrokes will be sent to the wrong application.

Before you begin to record the macro, make a test run with the third-party application, writing down all of the keystrokes required for the tasks you wish to perform.

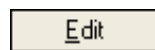
Avoid using:

- Tab or arrow keys in your macro because the cursor may not always be in the same position each time a window opens.
- Mouse clicks and movements, because the macro recorder does not record them.

Use keyboard shortcut keys instead to perform actions in the application.

**NOTE:** When a macro is executed, it can be impacted by the current keyboard settings of the client PC. Care should be taken to ensure that keyboard settings, such as Caps Lock, are not inadvertently left on. Agents should also be cautioned not to enter keystrokes while a macro is running, since that can also affect the macro.

Shortcut keys are indicated by an underlined letter in the button name, field name, or description. You press Alt, Ctrl, or Shift plus the underlined letter to perform the action. For instance:



In this case, pressing Alt+E clicks the Edit button.

The exact keystrokes for a keyboard shortcut are listed in the application's menu. For instance, in Microsoft Word, to find out what the shortcut is to save a document, choose File from the menu bar. On the drop-down menu the Save option is followed by its shortcut, Ctrl+S.

Common Windows shortcut keys are:

Shortcut Key	Description
Esc	Cancels an action.
Enter	Clicks OK or the default button in a dialog box. (Default buttons have a heavier border surrounding them.)
Ctrl+A	Selects all text.
Ctrl+C	Copies selected text to the clipboard.
Ctrl+P	Prints the document.
Ctrl+S	Saves the document.
Ctrl+V	Pastes text into the window at the cursor position.
Ctrl+X	Cuts selected text to the clipboard.

A macro can include keystrokes for multiple applications. For example, one macro might include keystrokes for word processing, spreadsheet, and database applications.

To switch between applications when recording a macro, use the mouse to select the application. Do not press Alt-Tab. If you do, these keystrokes are recorded and might not select the correct application when you play back the macro.

**NOTE:** Do not press Ctrl+Esc to click the Microsoft Windows Start button, or the Macro Recorder stops recording without providing a message showing that recording has stopped. All keystrokes recorded up to this point are deleted. To click Start without causing an error or stopping recording, use your mouse.

## Allowed Macro Keystrokes

Table 15. Allowed Macro Keystrokes—Keys

Key Type	Key	Macro Notation
Character	0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z * + ; = , - . / ` [ \ ] '	
Non-Character	Tab	[TAB]
	Backspace	[BACKSPACE]
	Enter/Return	[ENTER]
	Shift	[SHIFT]
	Control/Ctrl	[CONTROL]
	Alt	[ALT]
	Pause/Break	[PAUSE]
	Caps Lock	[CAPSLOCK]
	Esc	[ESC]
	Space/Space Bar	[SPACE]
	Page Up/PgUp	[PAGE-UP]
	Page Down/PgDn	[PAGE-DOWN]
	End	[END]
	Home	[HOME]
	Left Arrow	[LEFT-ARROW]
	Up Arrow	[UP-ARROW]
	Right Arrow	[RIGHT-ARROW]
	Down Arrow	[DOWN-ARROW]
	Print Scrn	[PRINTSCREEN]
	Insert	[INSERT]
	Delete	[DELETE]
	F1 through F24	[F1] ... [F24]

Table 16. Allowed Macro Special Commands

Special Command	Description
[ENTERPRISE FIELD:]	Inserts an Enterprise Data field.
[DATA FIELD:]	Inserts data from Agent Desktop.
[SYSTEM FIELD:]	Inserts data from Agent Desktop system fields.
[APPLICATION:=]	Changes focus to an application window. The equal sign ( = ) is used as a separator between the application and the window title. If either the application name or window title is missing, Agent Desktop attempts to find the correct application and window to play the macro to, based on the parameters present.
[DELAY]	Time, in milliseconds, to wait before performing the next macro command.  Example: <b>[DELAY] 1000</b> delays the next macro key or command by 1 second.

### Recording Macros

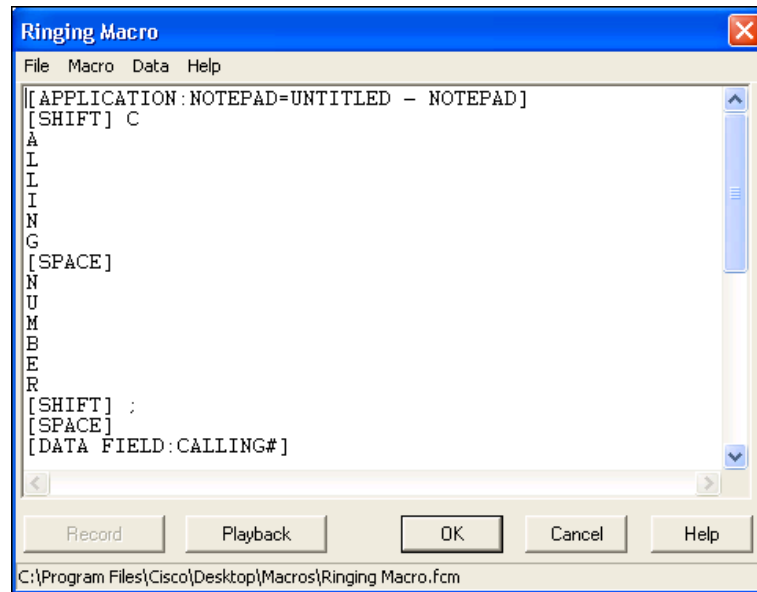
Follow these steps to record a macro.

#### *To record a macro:*

1. Start any third-party applications you want to include in the new macro, and then minimize them.
2. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.
3. Select the Run Macro tab, and then click New. The New Macro dialog box appears.

4. Enter a new macro action name, and then click OK. The Macro Editor window appears (Figure 65).

Figure 65. Macro Editor window with a macro script displayed



5. Click Record. The Macro Editor window minimizes and the macro recorder starts. Anything you type from now on is entered in the new macro.
6. Maximize the third-party application and begin typing. The macro recorder records your keystrokes.



7. If you want to insert an Agent Desktop or CAD-BE data field into the macro, press the Pause Macro hot key (the default is F2). The Macro Recorder Suspended dialog box appears (Figure 66).

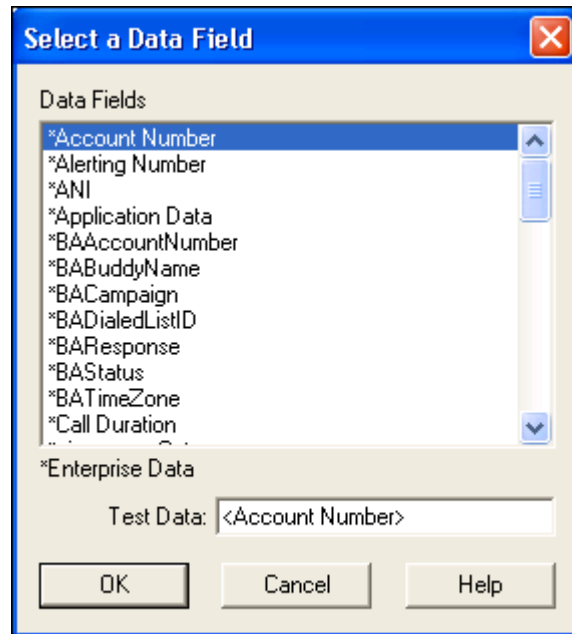
Figure 66. Macro Recorder Suspended dialog box



**NOTE:** Do not change the window focus away from the third-party application to the macro recorder before pressing the Pause Macro hot key and inserting a data field. If you do this, you will receive an error message and your macro recording will be interrupted.

8. Click Insert Data. The Select a Data Field dialog box appears (Figure 67). See [“Data Fields” on page 131](#) for more information.

Figure 67. Select a Data Field dialog box



9. Choose the desired data field from the list, enter test data if desired, and then click OK. The test data you enter is displayed in the application only when the macro is tested using the Playback function.

The Macro Recording Suspended dialog box appears.

10. Click Resume Recording to continue recording the macro.
11. Once you have finished recording the macro, press the macro hot key. The Macro Recording Suspended dialog box appears.
12. Click End Recording. You are returned to the Macro Editor window.
13. You can take any of the following actions:

- Click OK to save the macro as recorded.  
If there are no errors, the macro is saved and you are returned to the Select Action dialog box.  
If there are errors, the macro editor displays the line and highlights the text in question. Correct it and click OK again.
- Click Playback to test the macro.  
If there are errors, the macro editor displays the line and highlights the text in question. Correct it and click Playback again.

If there are no errors, the macro is played back. If it works as you want it to, click OK to save it and return to the Select Action dialog box.

To change test data, choose Data > Change Test Data in the macro editor and enter new test data.

- Click Cancel to cancel the macro.

The macro is canceled and the Select Action dialog box appears.

## Data Fields

The Select a Data Field dialog box (Figure 67) enables you to select and insert a Agent Desktop data field into a macro. Access this dialog box either through the Suspend Macro Recording dialog box or from the Data menu in the Macro Editor window.

There are three types of data fields:

- Standard. Data from the switch.
- System. System data, for example the date and time. These fields are enclosed in square brackets [ ].
- Enterprise. Data from the Enterprise service. These fields are marked with an asterisk ( \* ).

**NOTE:** When selecting data fields to be used in actions or rules, keep in mind that not every data field is available for every event. For example, the calling number is not available during the Startup event. If an unavailable field is used, <N/A> is displayed in the application the macro pops.

These fields can be included in the Run Macro and Launch External Application work flow actions.

The available data fields are:

**Table 17. Enterprise Data Fields**

Data Field	Description
*Account Number	The customer's account number.
*Alerting Number	The number of the ringing device.
*ANI	The number of the phone that made a call.
*Application Data	The ISDN user-to-user information element.
*BAAccountNumber	Outbound Dialer: The customer's account number.
*BABuddyName	Outbound Dialer: The customer's first and last name separated by a comma.

Table 17. Enterprise Data Fields — *Continued*

Data Field	Description
*BACampaign	Outbound Dialer: The name of the campaign to which the call belongs.
*BADialedListID	Outbound Dialer: Unique key identifying a specific customer record within the Dialing_List table located in the BA private database.
*BAResponse	Outbound Dialer: Multi-purpose placeholder that sends data from Agent Desktop to the BA Dialer. This variable responds to the reservation call, schedule and cancel callbacks, and changes to the callback phone number.
*BAStatus	<p>Outbound Dialer: Two characters indicating the mode and direction of the BA Dialer-initiated call. The first character identifies the call mode:</p> <ul style="list-style-type: none"> <li>• P: Reservation call, Preview mode</li> <li>• C: Customer call</li> <li>• A: Reservation call, callback</li> <li>• Z: Agent-to-agent transfer or conference customer call</li> </ul> <p>During a reservation call, the first character is P or A. When a customer call is transferred to an agent, the first character is C.</p> <p>The second character of BASTatus indicates the call direction:</p> <ul style="list-style-type: none"> <li>• O: Outbound</li> <li>• I: Inbound</li> <li>• B: Blended</li> </ul>

Table 17. Enterprise Data Fields — *Continued*

Data Field	Description
*BATimeZone	<p>Outbound Dialer: Indicates the GMT offset, in minutes, for the customer's time zone and obtains the customer's local time. The format of this ECC variable is +/-#####.</p> <p>This field's first character is either a positive or negative sign, followed by 5 digits. For example:</p> <ul style="list-style-type: none"> <li>This example indicates that the customer is one hour behind GMT: BATimeZone = -00060</li> <li>This example indicates that the customer is two hours ahead of GMT: BATimeZone = +00120</li> </ul>
*Call Duration	The difference between the call's end time and start time. The time is read from the Enterprise server's clock.
*cisco.com.Category	Reserved for future use.
*cisco.com.MessageKey	Reserved for future use.
*cisco.com.Priority	Reserved for future use.
*Collected Digits	Digits entered by the caller in response to IVR prompting.
*DNIS	The number of the phone that received a call.
*ICM Call Variable 1... *ICM Call Variable 10	Call-related variable data. There are 10 available variables.
*Last Called Number	The last number dialed.
*Last Calling Number	The last device that made a call.
*Last Connected Number	The last monitored device that joined the call.
*Last Queued Time	The amount of time spent in queue the last time the call was queued. The time is read from the Enterprise server's clock.
*Last Redirection Number	The last number the call was redirected from.
*Layout	The name of the enterprise data layout.

Table 17. Enterprise Data Fields — *Continued*

Data Field	Description
*Trunk ID	Device ID of the trunk.
*UCID	Not applicable.
[AGENT_ID]	The agent's identification.
[CALL_DURATION]	The difference between the call's end time and start time. The time is read from the agent's PC's clock.
[CALL_END_TIME]	The end time of the current call. If the call has not yet ended, it is the current time. The time is read from the agent's PC's clock.
[CALL_START_TIME]	The start time of the current call. If there is no call, this data is empty. The time is read from the agent's PC's clock.
[COMPUTER_NAME]	The name of the computer the agent is currently logged onto.
[LOCAL_PHONE_EXT]	The agent's extension.
Alerting#	The number of the ringing phone.
Called#	The number of the phone that received a call.
Calling#	The number of the phone that made a call.
Original Called#	The original number that received a call.
Original Calling#	The original number that made a call.

## Set Enterprise Data Action

This action enables you to set one enterprise data field variable that appears in the Agent Desktop or CAD-BE enterprise data pane to a desktop variable or static text of your choosing.

The action is available only for the Ringing and Answered events.

**NOTE:** Do not include a Set Enterprise Data action in the same work flow as the following Call Control actions: supervised transfer, blind transfer, conference, or blind conference. This can cause a critical race condition that results in the enterprise data not being available.

**To set up a Set Enterprise Data action:**

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.
2. Select the Set Enterprise Data tab, and then click New. The Set Enterprise Data Action Setup Editor dialog box appears ([Figure 68](#)).

**Figure 68. Set Enterprise Data Action Editor dialog box**

3. Complete the dialog box as follows:

Field	Description
Action Name	Enter a name for the new action.
Enterprise Data Field to Set	Select the enterprise data field you whose content you want to set. You can choose from among ECC, call, and BA (Cisco Outbound Dialer) variables.
Select one of the following data sources:	
Desktop Variable	From the drop-down list, select the desktop variable you want to be entered automatically in the enterprise data field. Your choices are Agent ID, System Name, System Time, or Skill Group.
Static Text	Enter the static text you want to be entered automatically in the enterprise data field. Maximum length of text for ECC fields is 210 characters, and for call variables, 39 characters.

4. Click OK.

## Timer Action

This action is available to Agent Desktop and CAD-BE agents at the Enhanced and Premium levels.

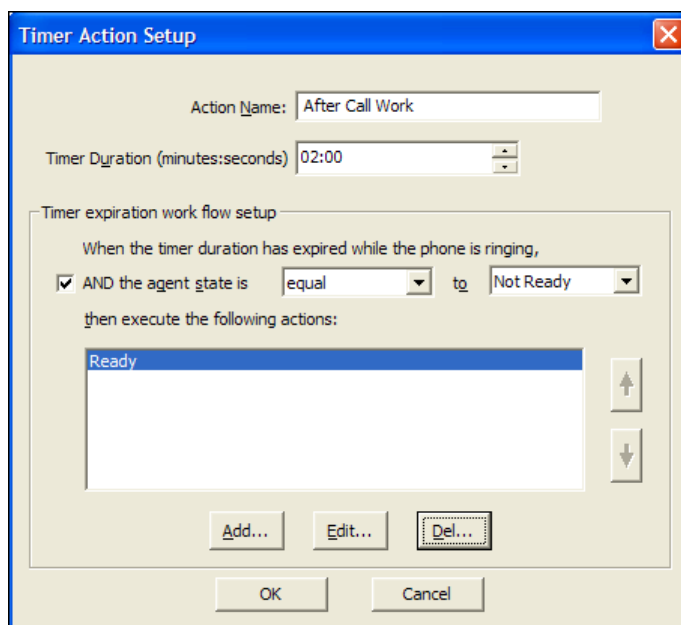
The timer action enables you to trigger Agent State, HTTP, Agent Notification or Set Enterprise Data actions after a certain amount of time has elapsed under specified circumstances.

For instance, you can configure the Timer action to change the agent's state to Ready if the agent has been in the Work state for 3 minutes.

### To set up a Timer action:

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.
2. Select the Timer Action tab, and then click New. The Timer Action Setup dialog box appears ([Figure 69](#)).

**Figure 69.** Timer Action Setup dialog box



3. Complete the Timer Action Setup dialog box as follows:

Field	Description
Action Name	Enter a name for the new action.



Field	Description
Timer Duration	Set the amount of time the agent must spend in the selected agent state before the action executes.
Timer Expiration Work Flow Setup section	In this section, specify the actions that will execute when the time duration has expired. You can specify that the agent state must also be equal or not equal to either Ready or Not Ready.

4. Click Add to select or set up the actions you want to execute when the timer has expired. You can choose among the following types of actions:
  - [Agent Notification Action \(page 105\)](#)
  - [Agent State Action \(page 107\)](#)
  - [HTTP Action \(page 111\)](#)
  - [Set Enterprise Data Action \(page 134\)](#)
5. When you have configured the Timer Expiration Work Flow, click OK.

## Utility Action

There are three utility actions:

- Start recording
- Stop recording
- Send a predefined, high-priority chat message to the agent's supervisor

### High Priority Chat Messages

A high priority chat message is a predefined message that appears in a supervisor's Chat window. The message behaves just like a regular chat message that is tagged as high priority—it pops up on the supervisor's screen on top of all other windows to attract the supervisor's attention.

You can configure a task button on the Agent Desktop or CAD-BE toolbar to send such a message from an agent to the agent's supervisor(s).

**NOTE:** For CAD-BE agents, a high priority chat message can be sent but it cannot be replied to by the supervisor, because CAD-BE agents do not have chat capability.

#### *To set up a utility action:*

1. Set up a new action. See [“Adding a New Action” on page 100](#). The Select Action window appears.

2. Select the Utility Action tab, and then click New. The Utility Action Setup dialog box appears (Figure 70).

Figure 70. Utility Action Setup dialog box

The image shows a Windows-style dialog box titled "Utility Action Setup" with a blue header bar and a red close button in the top right corner. The dialog has a light beige background. It contains three input fields: "Action Name" with the text "Start Recording", "Action Type" with a dropdown menu showing "Record", and "Action" with a dropdown menu showing "Start". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Utility Action Setup

Action Name Start Recording

Action Type Record

Action Start

OK Cancel Help

3. Enter a name for the new action, select an action type from the drop-down list, and then click OK.
  - If you select Record as the action type, select Start or Stop from the Action field.
  - If you select HighPriorityChat, type the message you want to send as the predefined, high-priority chat message in the Message field.

**NOTE:** When the dialog box initially opens, only the Action Name and Action Type fields are visible. When you choose the Record action type, the Action field appears. When you choose the High Priority Message action type, the Message field appears.

**NOTE:** If a Record action is part of a voice contact work flow, the agent being recorded will see a recording icon in the contact appearance pane even if notification is turned off.

## Cisco Unified CCX Outbound Preview Dialer

Cisco Unified Outbound Preview Dialer (Outbound Dialer) is a Unified CCX feature that enables automated outbound dialing to customers. These outbound calls appear as inbound calls to the agent, and information about the call appears in the Enterprise Data pane.

**NOTE:** Outbound Dialer is available only for Agent Desktop.

A supervisor or administrator sets up a calling campaign in Unified CCX that consists of various elements that will present calls to agents and provide information so the agent can handle the call successfully. (See the *Cisco Unified CCX Administration Guide* for information on setting up calling campaigns.)

Outbound Dialer uses the Direct Preview Dialing Mode. In this mode, an agent is reserved and then presented with a customer call along with customer information in the Enterprise Data window. Based on this information, the agent can decide to accept, skip, or reject the call. The agent can also categorize the phone call presented as Voice, Answering Machine, Invalid, or Fax Modem.

The customer callback feature enables an agent to reschedule a customer call at the customer's request for a more convenient time. When the call is redialed, the call is directed to any available agent.

### Outbound Dialer Actions

Based on the enterprise data information, the agent selects the appropriate Outbound Dialer action button on the Outbound Dialer toolbar.

The available Outbound Dialer actions and their associated toolbar buttons are displayed in [Table 18](#).

**Table 18.** Outbound Dialer actions and associated toolbar buttons










Button	Action	Description
	Accept	The system dials the customer and connects the call to the agent.
	Reject	The system rejects the current call and releases the agent from the outbound calling reservation. At this point, the system may deliver to the agent another outbound call or a new inbound call.
	Reject Close	The system rejects the current call and closes the record so the customer will not be called again.

Table 18. Outbound Dialer actions and associated toolbar buttons — *Continued*

Button	Action	Description
	Skip	The system skips the current call and presents the agent with another customer call.
	Skip Close	The system skips the current call and closes the record so the customer will not be called again.
	Skip-Next	The system skips the call and displays a menu of these options: <ul style="list-style-type: none"> <li>Wrong Number. The agent is informed that the number called is a wrong number. After the call terminates, the system calls other customer phone numbers.</li> <li>Not Home. The agent is informed that the customer is not home. After the call terminates, the system calls other customer phone numbers.</li> </ul>
	Callback	Displays the Callback Properties dialog box, which the agent uses to set a time and date to call back the customer. This action is enabled only if the agent is in the talking or wrap-up agent state. The agent also uses this dialog box to cancel a previously-scheduled callback of the current customer. This action works only if the agent is in a talking or wrap-up state during a Unified CCX-generated call.
	Reclassify	Displays a menu that enables the agent to reclassify a customer phone number as voice, answering machine, fax/modem, or an invalid number.
	Cancel Reservation	The system releases the agent from the calling campaign and places the agent in the Not Ready state. To resume participating in the calling campaign, the agent must change the agent state to Ready.

## Outbound Dialer Toolbar

In order for the Outbound Dialer actions to be available for agents to use, you must configure the agent interface to include the Outbound Dialer toolbar.

**NOTE:** You cannot prevent an agent from receiving Outbound Dialer calls by removing the Outbound Dialer toolbar from the agent's desktop. The agent must also be removed from the contact service queue that is handling the Outbound Dialer calls.

**To configure the Outbound Dialer toolbar to appear:**

1. In the User Interface window, select the Toolbar tab.
2. In the Outbound Dialer Mode section, select the Direct Preview check box (Figure 71).

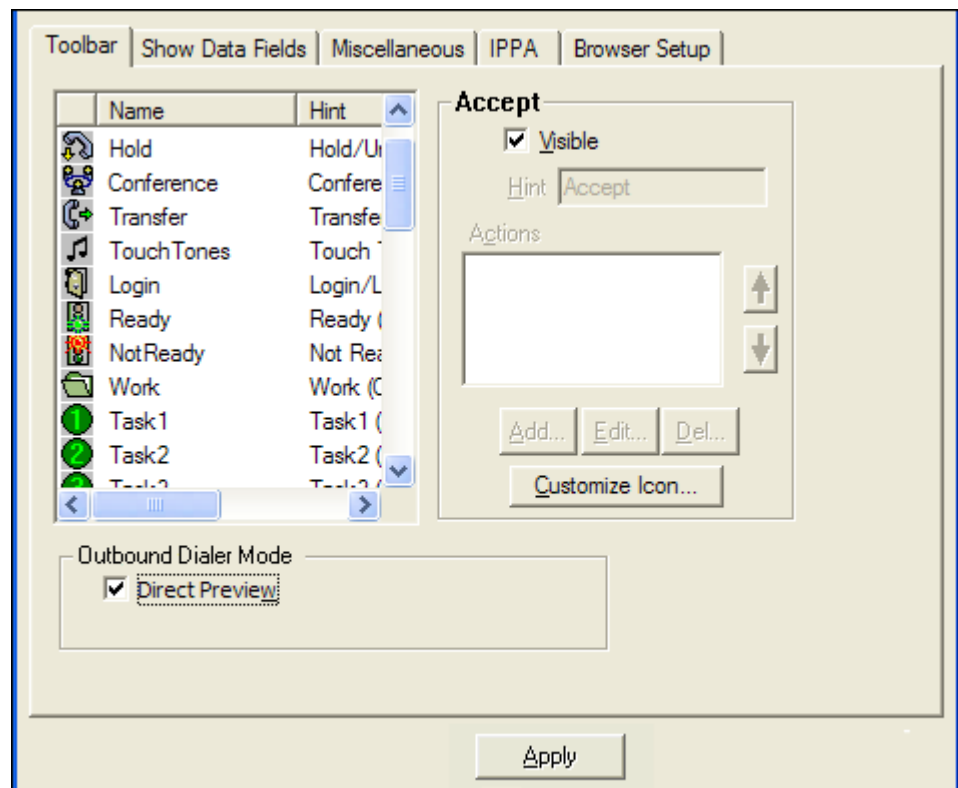
The appropriate buttons are enabled in the button selection pane.

**NOTE:** Instead of selecting the Direct Preview check box and enabling all Outbound Dialer buttons, you can configure selected Outbound Dialer toolbar buttons to appear on the Agent Desktop or CAD-BE interface. See [“Adding and Removing Toolbar Buttons” on page 72](#) for more information.

3. Click Apply to save your changes.

The Outbound Dialer toolbar will now appear on the Agent Desktop or CAD-BE interface.

**Figure 71.** User Interface toolbar tab



## Outbound Dialer Enterprise Data

Whenever an agent receives an Outbound Dialer call, the agent will see Outbound Dialer enterprise data. Unified CCX automatically uses the Outbound Dialer enterprise data layout (OODefault), which contains all the Outbound Dialer enterprise data variables, instead of the regular default layout.

The Outbound Dialer enterprise data variables are listed in [Table 19](#).

**Table 19.** Cisco Outbound Dialer enterprise data variables.

Variable	Comment
BAAccountNumber [200]	
BABuddyName [201]	
BACampaign [202]	
BADialedListID [203]	Required in order for the Skip function to work
BAResponse [204]	
BAStatus [205]	Required for all dialing modes.
BATimeZone [206]	Required for all dialing modes in order for the Callback function to work.
BACustomerNumber [207]	

**NOTE:** If a call is part of a Direct Preview dialing mode campaign, the first letter in the BAStatus field entry is a D when the dialer puts the agent in the reserved state, and a C when the agent is connected to a customer. If the BAStatus field is blank, all Outbound Dialer buttons are disabled. This may be the result of a communication or configuration problem.

You can edit the OODefault layout if you want to change which variables are displayed. For instructions on editing layouts, see [“Creating a Custom Layout” on page 155](#).

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## Getting Started with Desktop Administrator

# 3

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### Introduction

Desktop Administrator enables you to configure the following CAD elements:

- Services Configuration—enterprise data and silent monitoring and recording
- Personnel—agents
- Cisco Unified Presence Settings
- Agent E-Mail Settings

## Accessing Desktop Administrator

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You can access Desktop Administrator by either of two methods:

- From the Desktop Work Flow Administrator menu bar, choose Desktop Administrator > Side A. If your system includes redundancy, you can also choose Side B.
- In your web browser, enter Desktop Administrator's URL:  
`http://<CCX-server>:6293/teamadmin/main.cda`  
where CCX-server is the hostname or IP address of the server that hosts Cisco Unified Contact Center Express.

By default, only a default username is required to log in unless a password has been configured. Password usage by Desktop Work Flow Administrator and Desktop Administrator is linked. See ["Passwords" on page 19](#) for more information.

Only one person at a time can make changes in Desktop Administrator. Until a user logs out or until that user's login times out after 15 minutes of inactivity, other users can only view information.

### *To log in to Desktop Administrator:*

1. Access Desktop Administrator. The Login window appears.
2. By default, the username **admin** is autofilled in the Username field.
  - If a custom password has not been configured in either Desktop Administrator or in Desktop Work Flow Administrator, leave the Password field blank.
  - If a custom password has been configured in either Desktop Administrator or in Desktop Work Flow Administrator, enter that custom password in the Password field.
3. Click Login.



## Using the Search Function

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Follow these steps to search for one or more records on any Desktop Administrator page that contains the Search function.

**NOTE:** Searches are not case sensitive. For example, if you type a lowercase letter “s” in a search field, the results will include all items that begin with the lowercase letter “s” and the uppercase letter “S.”

**To search for one or more records:**

1. Enter your search criteria:
  - If you are searching for a text string, select the field name from the first drop-down list box, a search pattern from the second drop-down list box, and enter a text string in the third box.
  - If you are searching for a checked or cleared check box, select the check box name in the first drop-down list box, and True (checked) or False (cleared) in the second list box.
2. If necessary, complete any of the following actions.
  - If you want to add another criterion to the search query, click +. A new row appears. Repeat step [1](#) for the new row.
  - If you want to remove the last criterion from the search query, click —. The bottom row is deleted. If you click — and the search query only contains one criterion, no change occurs.
  - If you want to remove all of the criteria from the search query, click Clear Filter. All of the rows except the first row are deleted, and the first row is reset to the default value.
3. When you are done creating your search query, click Find. A list of results that match all of the criteria appears.

## Configuring a Password in Desktop Administrator

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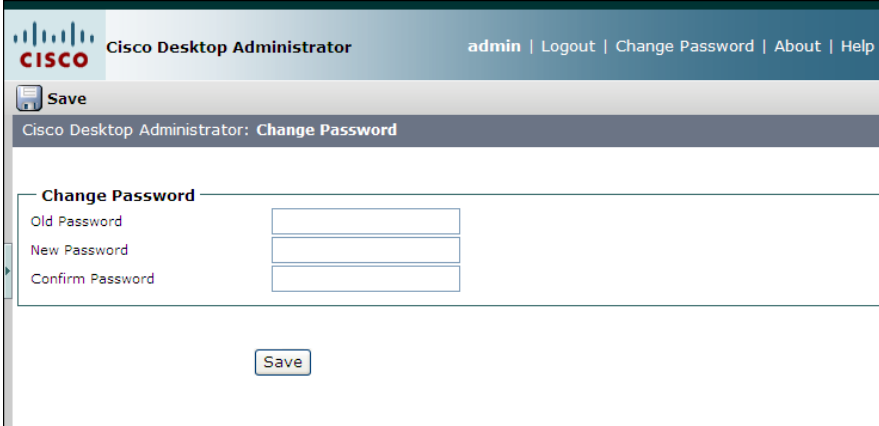
A password is not required to access Desktop Administrator. By default it is not password-protected. However, you can configure a password to protect access to Desktop Administrator.

**NOTE:** Any password you configure in Desktop Administrator is also the password for Desktop Work Flow Administrator.

*To change the default password:*

1. In Cisco Desktop Administrator, click Change Password. The Change Password window appears ([Figure 72](#)).

**Figure 72.** Change Password window



The screenshot shows the 'Change Password' window in the Cisco Desktop Administrator interface. The window has a title bar with the Cisco logo and the text 'Cisco Desktop Administrator'. Below the title bar is a navigation bar with links: 'admin | Logout | Change Password | About | Help'. The main content area is titled 'Cisco Desktop Administrator: Change Password'. It contains a section titled 'Change Password' with three input fields: 'Old Password', 'New Password', and 'Confirm Password'. A 'Save' button is located at the bottom of the window.

2. In the Old Password field, enter the default password, admin. In the New Password and Confirm Password fields, enter your new password, and then click Save.





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### Introduction

You can perform the following tasks in the Services Configuration node:

- [Configuring Enterprise Data \(page 150\)](#)
- [Configuring Desktop and Server Monitoring and Recording \(page 158\)](#)
- [Synchronizing Directory Services \(page 163\)](#)

## Configuring Enterprise Data

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The Enterprise Data node has two pages, the Fields page and the Layout List page.

You can perform the following tasks on the Fields page:

- [Creating a Custom Field \(page 151\)](#)
- [Editing a Field \(page 153\)](#)
- [Deleting a Field \(page 153\)](#)

You can perform the following tasks on the Layout List page:

- [Creating a Custom Layout \(page 155\)](#)
- [Copying a Layout \(page 156\)](#)
- [Editing a Layout \(page 157\)](#)
- [Deleting a Layout \(page 157\)](#)

Enterprise data is information associated with an incoming call. It is displayed in the Contact Management pane of Agent Desktop and CAD-BE, and on the Caller Data screen in IP Phone Agent.

## Fields

Enterprise data fields and layouts are configured under the Enterprise Data node.

**NOTE:** The agent applications must be restarted for any enterprise data variable or layout changes you make to go into effect.

The Field List displays both the predefined fields available for your switch type and the custom fields you create.

- Predefined fields have index numbers of 159–255. Only the display name of these fields is editable, with the exception of field 252, whose display name and field name can be edited. Note that when you click the Select All button, these fields are not selected.
- Custom fields have index numbers of 0–158, and are editable.

## Creating a Custom Field

*To create a custom field:*

1. Choose Services Configuration > Enterprise Data > Fields. The Field List page appears (Figure 73).

**Figure 73.** Field List page

Selected	Field Name	Display Name	Expanded Call Context (ECC)	Field Index
<input type="checkbox"/>	ANI	Yes	No	255
<input type="checkbox"/>	BAAccountNumber	BAAccountNumber	Scalar	200
<input type="checkbox"/>	BABuddyName	Nope	Scalar	201
<input type="checkbox"/>	BACampaign	BACampaign	Scalar	202
<input type="checkbox"/>	BACustomerNumber	BACustomerNumber	Scalar	207
<input type="checkbox"/>	BADialedListID	BADialedListID	Scalar	203
<input type="checkbox"/>	BResponse	BResponse	Scalar	204
<input type="checkbox"/>	BStatus	BStatus	Scalar	205
<input type="checkbox"/>	BTimeZone	BTimeZone	Scalar	206
<input type="checkbox"/>	BVTest	BV Test	Scalar	0

2. Click Add New. The Add New page appears(Figure 74).

Figure 74. Add New page

3. Complete the fields as described below.

Field	Description
Field Name	<p>The variable's field name. The field name and value can be up to 29 characters long and can contain any character except:</p> <p>- ` ~ ! @ # \$ % ^ &amp; * ( ) - + = [ ] { &lt; &gt; , / ?   \ \ : ; ' " and space</p> <p>If you use disallowed characters in the field name or value, the enterprise data field might not display in the IP Phone Agent service.</p>
Display Name	<p>The name that appears in desktop applications. The display name can be up to 29 characters long and can contain any character except:</p> <p>- ` ~ ! @ # \$ % ^ &amp; * ( ) - + = [ ] { &lt; &gt; , / ?   \ \ : ; ' "</p>
Expanded Call Context (ECC)	<p>If the field is an ECC variable, select the appropriate check box:</p> <ul style="list-style-type: none"> <li>• Scalar: A scalar ECC variable is one that stores a single piece of data.</li> <li>• Array: An array ECC variable is one that stores multiple pieces of data.</li> </ul> <p>If you selected array, choose the number of elements in the array from the number field drop-down list.</p>



Field	Description
Field Index	Choose a field index number from the drop-down list. The field automatically shows the next available number.  If you selected Array in the ECC field, the Field Index field is automatically disabled. The system will assign indexes to each element in the array.

4. Click Save to save your changes. The field is added.
5. When you are finished adding fields, click Return to Field list.

## Editing a Field

### *To edit a field:*

1. Choose Services Configuration > Enterprise Data > Fields. The Field List page appears ([Figure 73](#)).
2. If necessary, search for the field you want to edit. For instructions, see ["Using the Search Function" on page 145](#).
3. Select the field by clicking its name. The Field Information page for that field appears.
4. Edit the field information as desired.
  - For predefined fields, you can edit only the display name.
  - For custom fields, you can edit all field information.

Note that if you are editing an array field, the field index numbers assigned to the array elements are listed, separated by commas.

5. When you are finished making changes, click Save, then click Return to Field list.

## Deleting a Field

You cannot delete a predefined field. You can delete only custom fields.

If the field selected for deletion is the only field associated with a custom layout, you cannot delete it until another field is added to the custom layout, or the layout itself will be deleted. Either delete the custom layout, or add another field to it and then delete the field you originally intended to delete.

If the field selected for deletion is the only field associated with a default layout, you cannot delete it until another field is added to the default layout. Default layouts cannot be deleted, and must always contain at least one field.

***To delete a custom field:***

1. Choose Services Configuration > Enterprise Data > Fields. The Field List page appears ([Figure 73](#)).
2. If necessary, search for the field you want to delete. For instructions, see ["Using the Search Function" on page 145](#).
3. Select the check box corresponding to one or more custom fields, then click Delete Selected. The selected fields are no longer displayed in the Field list. However, the actual deletion is not performed until you click Save.

## Layouts

The Layout List displays the field layouts available for use in the agent applications. Each layout can contain up to 16 fields chosen from the Field List.

There are two default layouts:

- default—basic layout for normal operations
- OODefault—layout for Cisco Outbound Dialer campaigns

Unified CCX automatically uses the default layout for normal call activity. If you want to use a custom layout, a custom script to pop that layout must be created.

You cannot delete the default layout, but it can be edited to add or remove enterprise data variables.

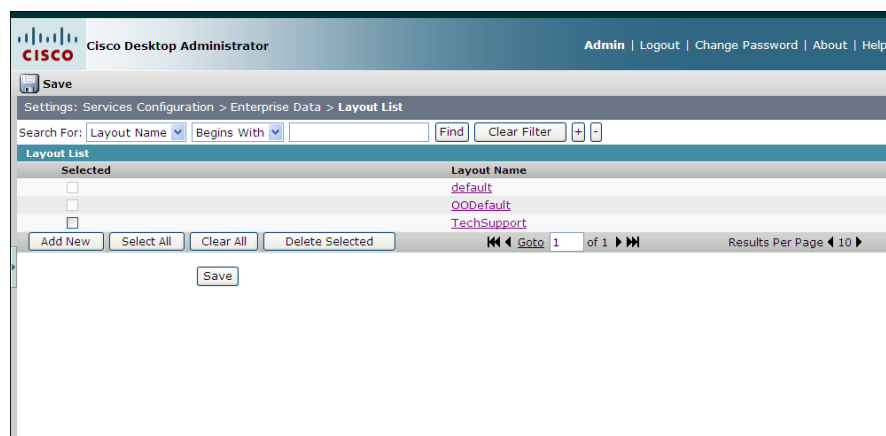
You can create up to 14 custom layouts in addition to the default layouts. Once the limit of custom layouts is reached, the Add New and Copy buttons are disabled.

## Creating a Custom Layout

*To create a custom layout:*

1. Choose Services Configuration > Enterprise Data > Layouts. The Layout List page appears ([Figure 75](#)).

**Figure 75.** Layout List page



2. Click Add New. The Add New page appears (Figure 74).

Figure 76. Add New page

3. Complete the fields as described below.

Field	Description
Layout Name	The layout name must be unique and be no longer than 16 characters.
Available	The fields available to be used in the layout. The list shows the field's index number and display name.
Selected	The fields that have been selected to be in the layout. The list shows the field's index number and display name.

4. Use the arrow buttons to move selected fields between the Available and Selected panes. Use the double arrow buttons to move all fields from one pane to the other. Use the Up and Down buttons to change the order of the fields in the Selected pane.
5. Click Save to save the custom layout. The layout is added to the Layouts list page.
6. When you are finished adding custom layouts, click Return to Layout list.

## Copying a Layout

1. Choose Services Configuration > Enterprise Data > Layouts. The Layout List page appears (Figure 75).

2. Select the layout you want to copy. The selected layout list page appears.
3. Click Copy.
4. Enter a name for the new layout and edit the fields as needed.
5. Click Save to save the copied layout. The layout is added to the Layouts list page.
6. If desired, repeat steps 4 and 5 to create more new layouts.
7. When you are finished, click Return to Layout list.

### Editing a Layout

1. Choose Services Configuration > Enterprise Data > Layouts. The Layout List page appears ([Figure 75](#)).
2. Select the layout you want to edit. The selected layout list page appears.
3. Edit the layout as needed.
4. Click Save to save the edited layout.
5. When you are finished, click Return to Layout list.

### Deleting a Layout

You cannot delete a default layout. You can delete only custom layouts.

#### *To delete a custom layout:*

1. Choose Services Configuration > Enterprise Data > Layouts. The Layout List page appears ([Figure 75](#)).
2. Select the check box corresponding to one or more custom layouts, then click Delete Selected. The selected layouts are no longer displayed in the Layout list. However, the actual deletion is not performed until you click Save.

## Configuring Desktop and Server Monitoring and Recording

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You can perform the following tasks on the VoIP Monitoring Device page of the Silent Monitoring & Recording node:

- [Enabling Desktop Monitoring \(page 158\)](#)
- [Configuring a Default Monitor Service \(page 159\)](#)
- [Assigning Phone Devices to a Specific VoIP Monitor Service \(page 160\)](#)
- [Removing a VoIP Monitor or Recording & Playback Service from Directory Services \(page 160\)](#)

The VoIP Monitoring Device page displays all phone devices configured in Unified CM.

If a phone is configured for extension mobility and a static extension is set up, the Extension field displays the static extension assigned to the device's MAC address. If no static extension is set up, the Extension field is blank.

**NOTE:** Assign a static extension to an extension mobility device to make administration easier.

### Enabling Desktop Monitoring

When desktop monitoring is enabled, software on the agent desktop handles recording and monitoring requests for that agent. This is possible only on desktops that are physically connected to the network through a hard IP phone or through a soft phone.

By default, desktop monitoring is enabled for all phone devices.

**NOTE:** Desktop monitoring does not function with some NIC cards that are unable to detect both voice packets and data packets in a multiple VLAN environment. For more information on this issue, and suggested work-arounds, see the *Cisco CAD Installation Guide*.

A phone is monitored either through desktop monitoring or a VoIP Monitor service—it cannot be monitored by both. However, a VoIP Monitor service can be a backup if the agent's desktop monitoring module fails to register with Directory Services when Agent Desktop is started.

To enable desktop monitoring:

1. Choose Services Configuration > Silent Monitoring & Recording > VoIP Monitoring Device. The VoIP Monitoring Device page appears (Figure 77).

Figure 77. VoIP Monitoring Device page

The screenshot shows the 'VoIP Monitoring Device' page in the Cisco Desktop Administrator. The page has a header with the Cisco logo and navigation links. Below the header, there's a breadcrumb trail: 'Settings: Services Configuration > Silent Monitoring & Recording > VoIP Monitoring Device'. The main content area is divided into sections. The 'General Settings' section has a 'Default VoIP Monitor Service' dropdown set to 'PECRSN17X05'. Below this is a search section with 'Search For' set to 'Extension' and 'Begins With' set to an empty field. There are 'Find' and 'Clear Filter' buttons. Below the search section is a 'Set Monitor Service for selected rows to:' dropdown set to '- Select -' and a 'Modify' button. The main table is titled 'VoIP Monitoring Device' and has five columns: 'Selected', 'Extension', 'MAC Address', 'Monitor Service', and 'Enable Desktop Monitoring'. The table contains 10 rows of data. The 'Selected' column has checkboxes, all of which are checked. The 'Extension' column contains values: 2051, 2281, 1501, 2881, 3002, 2129, 7754, 2931, 2882, 2938. The 'MAC Address' column contains values: SEP0002FD659E88, SEP0003E3698C75, SEP0003FFAF2EF, SEP0006281B82C4, SEP00062895B419, SEP000628D8A132, SEP00070EEA49FB, SEP0009B7F75436, SEP0009B7F75765, SEP000E839C1669. The 'Monitor Service' column has dropdown menus, all set to '- Select -'. The 'Enable Desktop Monitoring' column has checkboxes, all of which are checked. At the bottom of the table, there are 'Select All' and 'Clear All' buttons. Below the table, there's a 'Save' button. The page also shows pagination information: 'Results Per Page 10'.

Selected	Extension	MAC Address	Monitor Service	Enable Desktop Monitoring
<input checked="" type="checkbox"/>	2051	SEP0002FD659E88	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2281	SEP0003E3698C75	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1501	SEP0003FFAF2EF	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2881	SEP0006281B82C4	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	3002	SEP00062895B419	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2129	SEP000628D8A132	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	7754	SEP00070EEA49FB	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2931	SEP0009B7F75436	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2882	SEP0009B7F75765	- Select -	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2938	SEP000E839C1669	- Select -	<input checked="" type="checkbox"/>

2. If necessary, search for the phone device for which you want to enable desktop monitoring. For instructions, see ["Using the Search Function" on page 145](#).
3. Select the Enable Desktop Monitoring check box for the phone device and click Save. Desktop monitoring is enabled for that device.

## Configuring a Default Monitor Service

Select a default monitor service to avoid the possibility of having devices unassigned to any monitor service. This situation can arise when there is more than one VoIP Monitor service in the system.

**NOTE:** If your system has only one VoIP Monitor service, it is not necessary to set a default monitor service or to manually assign each device to that single monitor service. The VoIP Monitor service assumes that each device is assigned to it as the only available monitor service.

Modifications you make on the VoIP Monitoring Device page go into effect immediately after you save your changes.

***To configure a default VoIP Monitor service:***

1. Choose Services Configuration > Silent Monitoring & Recording > VoIP Monitoring Device. The VoIP Monitoring Device page appears ([Figure 77](#)).
2. From the Default VoIP Monitor Service drop-down list, select the VoIP Monitor service you want to be the default service.
3. Click Save.

## **Assigning Phone Devices to a Specific VoIP Monitor Service**

***To assign a phone device to a specific VoIP Monitor service:***

1. Choose Services Configuration > Silent Monitoring & Recording > VoIP Monitoring Device. The VoIP Monitoring Device page appears ([Figure 77](#)).
2. If necessary, search for the phone device you want to assign to a VoIP Monitor server. For instructions, see "[Using the Search Function](#)" on page 145.
3. Select the Selected check box for the device, then select the desired VoIP Monitor service from the Monitor Service drop-down list.
  - To assign multiple devices, select the Selected check boxes for each device, then select the desired VoIP Monitor service from the drop-down list field above the list of devices, and then click Modify.
4. Click Save. The device or devices are now assigned to the specific VoIP Monitor service.

## **Removing a VoIP Monitor or Recording & Playback Service from Directory Services**

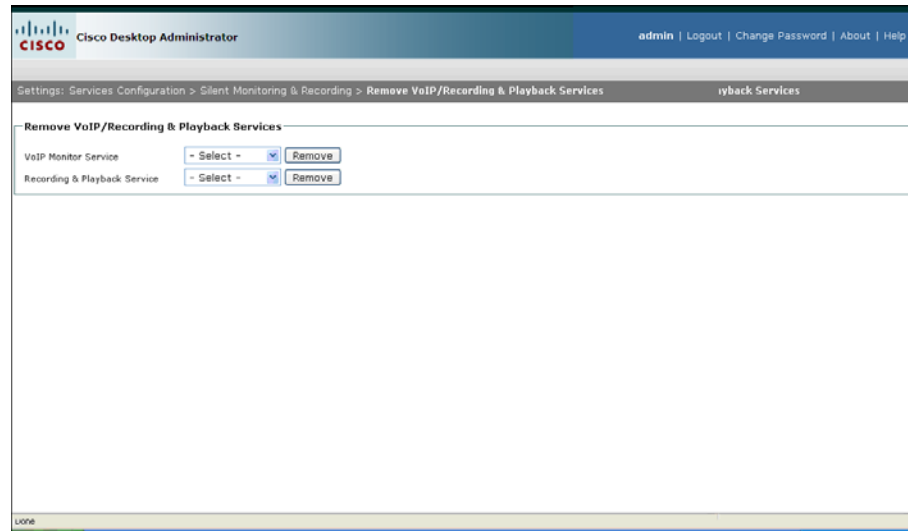
The Remove VoIP/Recording/Playback Services page enables you to remove a VoIP Monitor service or Recording & Playback service from Directory Services and unregister it from the LRM service.

Remove these services only if you intend to uninstall (or already have uninstalled) the VoIP Monitor service or Recording & Playback service permanently. The Remove option enables you to clean up Directory Services.



**To remove a VoIP Monitor or Recording & Playback service from Directory Services:**

1. Choose Services Configuration > Silent Monitoring & Recording > Remove VoIP/Recording & Playback Services. The Remove VoIP/Recording & Playback Services page appears ([Figure 78](#)).

**Figure 78. Remove VoIP/Recording & Playback Services page**

2. From the appropriate drop-down list, select the service to be removed, and then click Remove. The service is removed from Directory Services.

When you remove a VoIP Monitor service from Directory Services, it also removes that service from the list of available VoIP Monitor services on the VoIP Monitoring Device page as well ([Figure 77](#)). This can result in devices becoming unmonitored.

If the selected VoIP Monitor service has been set as the default service, you are notified that this situation exists when you click Remove. When you click OK to confirm that you want to remove the default VoIP Monitor service, any device that was monitored by the default service will now be unmonitored. It is recommended that you select another VoIP Monitor service to be the default. See "[Configuring a Default Monitor Service](#)" on page 159 for more information.

If the VoIP Monitor service was selected to monitor specific devices, when you click OK the following can occur:

- The devices will be monitored by the default VoIP Monitor service (if one is configured)
- The devices will be monitored by desktop monitoring, if the Enable Desktop Monitoring checkbox is selected for each device
- The devices will be unmonitored

If devices become unmonitored, search for them on the VoIP Monitor Devices page and reassign them to the default monitor, a specific monitor, or enable desktop monitoring.

**To restore a removed service to Directory Services:**

1. Start the removed service.
  - If you uninstalled the service, reinstall it. See the *Cisco CAD Installation Guide* for information on installing CAD services.
  - If you have not uninstalled the service, stop the service and then restart it, using the Windows Services utility in Control Panel.
2. In Desktop Administrator, click the VoIP Monitoring Device node again. The refreshed page shows that the service is restored to the list of available services.

## Synchronizing Directory Services

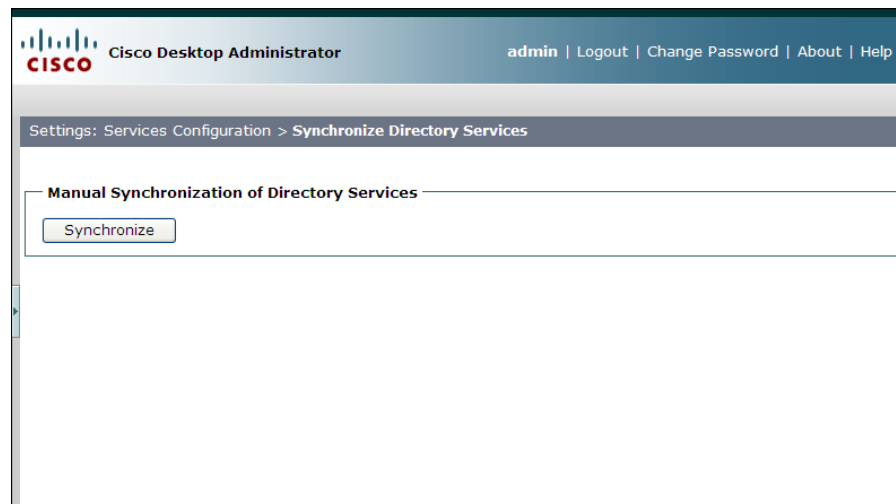
The Directory Services database should be synchronized with the master Unified CCX agent database. The databases are synced automatically whenever the master Unified CCX database changes. However, you can manually sync them with the Synchronize Directory Services command.

**NOTE:** You can also synchronize Directory Services manually from Work Flow Administrator. See ["Synchronizing Directory Services" on page 31](#) for more information.

*To synchronize the databases manually:*

1. Choose Services Configuration > Synchronize Directory Services. The Synchronize Directory Services page appears ([Figure 79](#)).

Figure 79. Synchronize Directory Services page



2. Click Synchronize. The databases are synchronized, and you will see the message, "Transaction successful" when the process is complete.



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## Personnel Configuration

# 5

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### Introduction

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Personnel displays a list of agents configured in Unified CCX. This node enables you to view information about agents and assign agent to work flow groups.

## Configuring Agents

You can perform the following tasks from the Agents page of the Personnel node:

- [Changing an Agent's Work Flow Group \(page 166\)](#)

### Changing an Agent's Work Flow Group

1. Choose Personnel > Agents. The Agents List page appears ([Figure 80](#)).

Figure 80. Agents List page

Selected	Last Name	First Name	Login ID	Team	Workflow Group
<input type="checkbox"/>	agent	bv	bvagent	Default	default
<input type="checkbox"/>	Almquist		2281	Default	default
<input type="checkbox"/>	Baker	Scott	bakers	Default	default
<input type="checkbox"/>	Bendickson	Mike	bendicm	Default	default
<input type="checkbox"/>	Bonser	Boof	bonserb	Default	default
<input type="checkbox"/>	Brezinski	Tom	brezint	Default	default
<input type="checkbox"/>	Brezinski2Brezinski2	Tom2	brezint2	Default	default
<input type="checkbox"/>	cupsAgentMisra		5153	Default	default
<input type="checkbox"/>	cupsAgentSharmista	Misra	5152	Default	default
<input type="checkbox"/>	cupsAgentSm		5159	Default	default

2. If necessary, search for the agent you want to assign to a work flow group. For instructions, see ["Using the Search Function" on page 145](#).
3. Select the Selected check box for the agent, then select the desired work flow group from the Work Flow Group drop-down list field.
  - To assign multiple agents to a work flow group, select the Selected check boxes for each agent, then select the desired work flow group from the drop-down list field above the list of agents, and then click Modify.
4. Click Save. The agent or agents are now assigned to the specific work flow group.

**NOTE:** If a recently-added work flow group does not appear in the drop-down list, or a recently-deleted work flow group does appear in the drop-down list, refresh the page by clicking the Personnel > Agents link again.

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## Introduction

The Cisco Unified Presence Settings node in Desktop Administrator gives administrators the ability to integrate Cisco Unified Presence with CAD.

Integrating Unified Presence with CAD makes it possible for supervisors using Supervisor Desktop and agents using Agent Desktop to view the availability of non-agents using Cisco Unified Personal Communicator or Microsoft Office Communications Server (MOCS). This feature enables supervisors and agents to initiate chat sessions with subject matter experts (SMEs) who can provide information that can help agents assist customers more quickly and effectively.

For more information about Desktop Presence Administrator, see the description at the following URL:

<http://www.cisco.com/en/US/products/ps6837/index.html>

Integrating a Unified Presence cluster with CAD consists of the following tasks.

- [Configuring the Cisco Unified Presence Server \(page 168\)](#)
- [Configuring the Cisco Unified Presence Cluster \(page 169\)](#)
- [Configuring Contact Lists \(page 171\)](#)
- [Configuring External Contacts \(page 180\)](#)
- [Configuring Work Flow Groups \(page 185\)](#)

## **Configuring the Cisco Unified Presence Server**

The Cisco Unified Presence server must be configured to accept inbound requests from agent devices so that, when an agent logs into Cisco Agent Desktop, the agent's computer will be able to connect to the Cisco Unified Presence server.

To enable this connection, an inbound Access Control List (ACL) must be configured to allow inbound messages from the agent computer's IP address or to allow all inbound messages.

### ***To configure the Unified Presence server:***

1. Access Cisco Unified Presence Administration.
2. Navigate to System > Security > Incoming ACL.
3. Create an incoming ACL with the address pattern set to either the agent PC's IP address or to ALL.

For more detailed information on configuring an ACL, see the topic, "Configuring System Information on Cisco Unified Presence" in the *Configuration and Maintenance Guide for Cisco Unified Presence Release 7.0*, available at [www.cisco.com](http://www.cisco.com).



## Configuring the Cisco Unified Presence Cluster

The first task in integrating CAD with a Unified Presence cluster is configuring the Unified Presence cluster by specifying the connection information.

**NOTE:** It is assumed that all of the agents are managed in one Unified Presence cluster.

**NOTE:** All agents must be licensed as CUP Enabled and CUPC Enabled in Cisco Unified CM Administration in order to use Unified Presence from within Agent Desktop. An agent's status can be verified by logging into Unified CM Administration and viewing System > Licensing > Capabilities Assignments. See the Unified CM Administration documentation for more information.

*To configure the Unified Presence cluster:*

1. Choose Cisco Unified Presence Settings > Cisco Unified Presence Cluster Settings. The Cisco Unified Presence Cluster Settings page appears (Figure 81).

Figure 81. Cisco Unified Presence Cluster Settings page

2. Complete the fields as described below.

Field	Description
Enable Cisco Unified Presence Integration	Status of communication between supervisors and agents and non-agents.

Field	Description
Version	Version of Cisco Unified Presence.
Publisher Host/IP Address	Hostname or IP address of Unified Presence server (the publisher if you have a Unified Presence cluster).
AXL Login ID	The Unified Communicator user ID of a user who can log in to Unified Communicator and who appears in the same LDAP or Active Directory as the contact center agents. This login ID should not be a Unified Presence administrator login ID.
Password	Password for the AXL Login ID user.
Subscriber Host/IP Addresses	If you have a Unified Presence cluster, the hostname or IP address of the Unified Presence subscriber(s).

3. Click Verify to confirm that the information you entered is correct. Desktop Presence Administrator connects to the Unified Presence server using the hostname or IP address, login ID, and password you entered.
4. Click Save to save your changes.

## Configuring Contact Lists

A contact list consists of the SMEs that you want to make available to agents who use Agent Desktop. Agents and supervisors see the SMEs in the Contact Selection window after clicking the Chat button when the Presence feature is enabled. An agent only sees the SMEs who are assigned to the agent's work flow group. A supervisor, however, sees all of the SMEs in all of the work flow groups that are associated with the supervisor's teams.

**NOTE:** Agents and supervisors must restart Agent Desktop and Supervisor Desktop to see any changes you make to contact lists.

Unified Presence can be configured to allow you to assign up to 100 SMEs to a contact list in Unified Presence 6.0, and up to 200 SMEs to a contact list in Unified Presence 7.0 or higher.

Use the Contact Lists node to complete the following tasks.

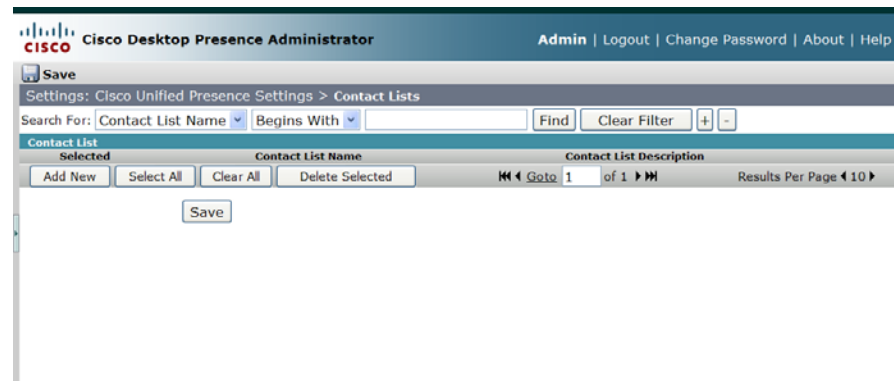
- [Creating a Contact List \(page 171\)](#)
- [Finding a Contact List \(page 172\)](#)
- [Deleting a Contact List \(page 173\)](#)
- [Editing a Contact List \(page 173\)](#)
- [Adding SMEs to a Contact List \(page 175\)](#)

## Creating a Contact List

*To create a contact list:*

1. Choose Cisco Unified Presence Settings > Contact Lists. The Contact Lists page appears ([Figure 82](#)).

**Figure 82.** Contacts Lists page



2. Create a new contact list by clicking Add New. The Add New page appears (Figure 83).

Figure 83. Add New page

The screenshot shows the 'Add New' page in the Cisco Desktop Presence Administrator. The page has a header with the Cisco logo and navigation links: Admin, Logout, Change Password, About, and Help. Below the header is a breadcrumb trail: Settings: Cisco Unified Presence Settings > Contact Lists > Add New. The main content area is titled 'Contact List Information' and contains two text input fields: 'Contact List Name' and 'Contact List Description'. Below these fields is a search section with 'Search For' set to 'Included' and a dropdown for 'True'. There are buttons for 'Find', 'Clear Filter', and '+' and '-' icons. At the bottom of the page, there is a table titled 'Subject Matter Expert List' with columns 'Last Name', 'First Name', 'URI', and 'Included'. The table has buttons for 'Select All' and 'Clear All', and a 'Goto 1 of 1' pagination control. At the very bottom are 'Save' and 'Return to Contact list' buttons.

3. Type a name in the Contact List Name field and a description in Contact List Description.
4. Click Save, then click Return to Contact list. The Contact Lists page reappears with the new contact list.

**NOTE:** A contact list name has a maximum of 64 characters.

## Finding a Contact List

You can search for a contact list from any of the following pages.

- Contact Lists page. Navigate to this page by choosing Cisco Unified Presence Settings > Contact Lists.
- Work Flow Groups page. Navigate to this page by choosing Cisco Unified Presence Settings > Work Flow Groups, then selecting a work flow group.

**NOTE:** Searches are not case sensitive. For example, if you type a lowercase letter “s” in a search field, the results will include all items that begin with the lowercase letter “s” and the uppercase letter “S.”

### To find a contact list:

1. Select a descriptor from the Search for drop-down list, then type one or more characters in the text field.

2. If necessary, complete any of the following actions.
  - If you want to add another condition to the search query, click +. A new row containing a field drop-down list, a descriptor drop-down list, and a text field appears. Repeat step 1 for the new row.
  - If you want to remove the last condition from the search query, click —. The bottom row is deleted. If you click — and the search query only contains one condition, no change occurs.
  - If you want to remove all of the conditions from the search query, click Clear Filter. All of the rows except the first row are deleted, and the first row is reset to the default value.
3. When you are done creating your search query, click Find. A list of contact lists that match all of the conditions appears.

## Deleting a Contact List

### *To delete a contact list:*

1. Choose Cisco Unified Presence Settings > Contact Lists. The Contact Lists page appears ([Figure 82](#)).
2. If necessary, search for the contact list you want to delete. For instructions, see ["Finding a Contact List" on page 172](#).
3. Select the check box that corresponds to the contact list you want to delete, then click Delete Selected. The selected contact list is no longer displayed in the list of contacts. However, the actual deletion is not performed until you click Save.

## Editing a Contact List

### *To edit a contact list:*

1. Choose Cisco Unified Presence Settings > Contact Lists. The Contact Lists page appears ([Figure 82](#)).
2. If necessary, search for the contact list you want to edit. For instructions, see ["Finding a Contact List" on page 172](#).

3. Select the contact list by clicking its name. The page for that specific contact list appears (Figure 84).

**Figure 84. Contacts List page — specific list**

Cisco Desktop Administrator

Settings: Cisco Unified Presence Settings > Contact Lists > Shipping

**Contact List Information**

Contact List Name: Shipping

Contact List Description: Shipping

Search For: Included | True | Find | Clear Filter

**Subject Matter Expert List**

Last Name	First Name	URI	Included
Emmanuel	Jacobs	2073@P1.RD.LD	<input checked="" type="checkbox"/>
Gary	Mahle	mahleg@p1.rd.ld	<input checked="" type="checkbox"/>

Select All | Clear All | Goto 1 of 1 | Results Per Page 10

Save | Copy | Return to Contact list

4. Complete one or both of the following operations.
  - If you want to remove one or more SMEs from the contact list, clear the corresponding check boxes in the Included column.
  - If you want to change the description of the contact list, type the new description in the Contact List Description field.
5. When you are finished making changes, click Save, then click Return to Contact list.

## Adding SMEs to a Contact List

Desktop Administrator searches the Unified Presence LDAP server for SMEs, and when found, saves them to the CAD LDAP server.

**NOTE:** If you want to provide access to users in an external environment who are not managed by the Unified Presence LDAP server, you can add them manually as external contacts. For instructions, see ["Adding External Contacts" on page 180](#).

### To add SMEs to a contact list:

1. Choose Cisco Unified Presence Settings > Contact Lists. The Contact Lists page appears ([Figure 82](#)).
2. Select a contact list by clicking its name. The page for that specific contact list appears. If the contact list you selected does not include any SMEs, the Subject Matter Expert List will be empty ([Figure 85](#)).

Figure 85. Specific contact list page with no SMEs

**Cisco Desktop Presence Administrator** Admin | Logout | Change Password | About | Help

Save Copy

Settings: Cisco Unified Presence Settings > Contact Lists > Marketing - West

**Contact List Information**

Contact List Name: Marketing

Contact List Description: Marketing - West

Search For: Included True Find Clear Filter + -

**Subject Matter Expert List**

Last Name	First Name	URI	Included
<p>Select All Clear All</p> <p>Go to 1 of 1</p> <p>Results Per Page 10</p>			

Save Copy Return to Contact list

- Find the SME you want to add using the Search function. For instructions about finding SMEs, see ["Finding SMEs" on page 176](#). Figure 86 shows the SMEs whose last name begins with the letter “s” and also contains the letter “c.”

Figure 86. Specific contact list page with SMEs

**Cisco Desktop Presence Administrator** Admin | Logout | Change Password | About | Help

Settings: Cisco Unified Presence Settings > Contact Lists > Marketing - West

**Contact List Information**

Contact List Name: Marketing  
Contact List Description: Marketing - West

Search For: Last Name Begins With s  
Last Name Begins With c Find Clear Filter + -

Last Name	First Name	URI	Included
Sanchez	Alessandra	sanchea@p1.rd.ld	<input type="checkbox"/>
Sanchez	Alexandra	sancheal@p1.rd.ld	<input type="checkbox"/>
Sanchez	Ali	sancheali@p1.rd.ld	<input type="checkbox"/>
Schultz	Hannah	schulth@p1.rd.ld	<input type="checkbox"/>
Schultz	Justin	schultj@p1.rd.ld	<input type="checkbox"/>
Schwartz	Brent	schwarb@p1.rd.ld	<input type="checkbox"/>
Stuck	Elizabeth	stucke@p1.rd.ld	<input type="checkbox"/>

Select All Clear All Goto 1 of 1 Results Per Page 10

Save Copy Return to Contact list

- Select the SMEs you want to add to the contact list.
  - To add all of the SMEs that are displayed, click Select All.
  - To add SMEs individually, select the corresponding check box in the Included column.
- If you want to find and add other SMEs, repeat steps 3 and 4.
- When you are done adding SMES, click Save, then click Return to Contact list.

## Finding SMEs

**NOTE:** Searches are not case sensitive. For example, if you type a lowercase letter “s” in a search field, the results will include all items that begin with the lowercase letter “s” and the uppercase letter “S.”

**NOTE:** You can only search for SMEs from the page of a specific contact list.



**To find SMEs:**

1. Choose Cisco Unified Presence Settings > Contact Lists. The Contact Lists page appears.
2. Select a contact list by clicking its name. The page for that specific contact list appears.
3. If you do not want the search results to include SMEs who are already in the current contact list, select Included from the Search for field drop-down list and False from the criterion drop-down list, then click +. A new condition with default values (Included and True) is added to the search query (Figure 87).

**NOTE:** If you use the Included field in a search condition, you must add a second condition that uses the Last Name or First Name field. You cannot search using the Included field alone.

**Figure 87. Search query with two conditions (default)**

The screenshot shows the Cisco Desktop Presence Administrator interface. At the top, there's a navigation bar with the Cisco logo and the text "Cisco Desktop Presence Administrator". On the right, there are links for "Admin", "Logout", "Change Password", "About", and "Help". Below the navigation bar, there's a breadcrumb trail: "Settings: Cisco Unified Presence Settings > Contact Lists > Marketing - West".

The main content area is titled "Contact List Information". It contains two text input fields: "Contact List Name" with the value "Marketing" and "Contact List Description" with the value "Marketing - West".

Below this, there's a "Search For:" section. It has two dropdown menus. The first dropdown is set to "Included" and the second is set to "True". To the right of these dropdowns are buttons for "Find", "Clear Filter", and a "+" button.

Below the search section, there's a table titled "Subject Matter Expert List". The table has four columns: "Last Name", "First Name", "URI", and "Included". The table is currently empty. Below the table, there are buttons for "Select All", "Clear All", "Save", "Copy", and "Return to Contact List".

At the bottom of the page, there's a pagination bar that says "Goto 1 of 1" and "Results Per Page 10".

4. Select either Last Name or First Name from the field drop-down list and a descriptor from the drop-down list, then type one or more characters in the search field (Figure 88).

**Figure 88.** Search query with two conditions

The screenshot shows the Cisco Desktop Presence Administrator web interface. At the top, there's a navigation bar with 'Admin | Logout | Change Password | About | Help'. Below it, a breadcrumb trail reads 'Settings: Cisco Unified Presence Settings > Contact Lists > Marketing - West'. The main section is titled 'Contact List Information' and contains two text input fields: 'Contact List Name' with the value 'Marketing' and 'Contact List Description' with the value 'Marketing - West'. Below these is a 'Search For:' section with two dropdown menus: 'Included' and 'False'. Underneath, there are two more dropdowns: 'Last Name' and 'Begins With', followed by a text input field containing 'car'. To the right of these are 'Find' and 'Clear Filter' buttons, along with '+' and '-' buttons to add or remove conditions. Below the search section is a table titled 'Subject Matter Expert List'. The table has four columns: 'Last Name', 'First Name', 'URI', and 'Included'. Below the table header, there are buttons for 'Select All' and 'Clear All', a pagination control showing 'Goto 1 of 1', and a 'Results Per Page' dropdown set to '10'. At the bottom of the interface, there are 'Save', 'Copy', and 'Return to Contact list' buttons.

**NOTE:** You can also leave the Last Name and First Name fields blank in order to find all SMEs, or all SMEs who fit your other search criteria. If the search returns more than 500 results, only the first 500 will be displayed.

5. If necessary, complete any of the following actions.
  - If you want to add another condition to the search query, click +. A new row containing a field drop-down list, a descriptor drop-down list, and a text field appears. Repeat step 4 for the new row.
  - If you want to remove the last condition from the search query, click —. The bottom row is deleted. If you click — and the search query only contains one condition, no change occurs.
  - If you want to remove all of the conditions from the search query, click Clear Filter. All of the rows except the first row are deleted, and the first row is reset to the default value.

6. When you are done creating your search query, click Find. A list of SMEs that match all of the conditions appears (Figure 89).

Figure 89. Search query with results

**Cisco Desktop Presence Administrator** Admin | Logout | Change Password | About | Help

Settings: Cisco Unified Presence Settings > Contact Lists > Marketing - West

**Contact List Information**

Contact List Name: Marketing  
Contact List Description: Marketing - West

Search For: Included ☐ False ☐  
Last Name  Begins With  car

**Subject Matter Expert List**

Last Name	First Name	URI	Included
Carlson	Susan	carlsos@p1.rd.ld	<input type="checkbox"/>
Carmichael	Annie	carmica@p1.rd.ld	<input type="checkbox"/>
Caron	Cedric	caronc@p1.rd.ld	<input type="checkbox"/>
Carter	Connor	cartec@p1.rd.ld	<input type="checkbox"/>

Select All Clear All  1 of 1  10

## Configuring External Contacts

If you have an external environment with subject matter experts who do not use Cisco Unified Personal Communicator but who do use Microsoft Office Communicator (MOC), you can use the External Contacts feature to provide access to those additional users.

Use the External Contacts node to complete the following tasks.

- [Adding External Contacts \(page 180\)](#)
- [Finding an External Contact \(page 182\)](#)
- [Editing an External Contact \(page 183\)](#)
- [Deleting an External Contact \(page 183\)](#)

### Adding External Contacts

*To add an external contact:*

1. Choose Cisco Unified Presence Settings > External Contacts. The External Contacts page appears ([Figure 90](#)).

**Figure 90.** External Contacts page

The screenshot shows the Cisco Desktop Presence Administrator interface. At the top, there's a header with the Cisco logo, the title "Cisco Desktop Presence Administrator", and navigation links: "Admin", "Logout", "Change Password", "About", and "Help". Below the header, there's a "Save" button and a breadcrumb trail: "Settings: Cisco Unified Presence Settings > External Contacts". A search bar is present with "Search For:" followed by two dropdown menus (one set to "Last Name" and the other to "Begins With"), a "Find" button, a "Clear Filter" button, and plus/minus icons. Below the search bar is a table titled "External Contact List". The table has columns: "Selected", "Last Name", "First Name", "URI", and "Phone Number". Below the table header are buttons: "Add New", "Select All", "Clear All", and "Delete Selected". To the right of these buttons is a pagination control showing "Goto 1 of 1" and "Results Per Page 10". Below the table is a "Save" button.

2. Click Add New. The Add New page appears (Figure 91).

Figure 91. Add New page

The screenshot shows the 'Add New' page in the Cisco Desktop Presence Administrator. The breadcrumb trail is 'Settings: Cisco Unified Presence Settings > External Contacts > Add New'. The page contains a form titled 'External Contact Information' with the following fields: Last Name (Schmidt), First Name (Carly), URI (schmic@p1.rd.id), and Phone Number (555-555-5555). At the bottom, there are two buttons: 'Save' and 'Return to External Contact list'.

3. Complete the fields as described below.

Field	Description
Last Name	Optional. Maximum of 128 characters. No restrictions on the characters that can be entered.
First Name	Optional. Maximum of 128 characters. No restrictions on the characters that can be entered.
URI	Uniform Resource Indicator. Required. No restrictions on the length or characters that can be entered.
Phone Number	Optional. No restrictions on the length or characters that can be entered.

4. Click Save to save your changes. The external contact is added.

**NOTE:** After you click Save, you cannot edit the URI field. If you want to change the URI of an existing external contact, you must delete the external contact and create a new external contact with the new URI.

5. If you want to create additional external contacts who have similar information, click Copy, edit the fields as needed, then click Save.
6. When you are finished adding an external contact, click Return to External contact list.

## Finding an External Contact

**NOTE:** Searches are not case sensitive. For example, if you type a lowercase letter “s” in a search field, the results will include all items that begin with the lowercase letter “s” and the uppercase letter “S.”

### To find an external contact user:

1. Choose Cisco Unified Presence Settings > External Contacts. The External Contacts page appears (Figure 90).
2. Select a field (for instance, Last Name) and a descriptor (for instance, Begins With), then type one or more characters in the text field.
3. If necessary, complete any of the following actions.
  - If you want to add another condition to the search query, click +. A new row containing a field drop-down list, a descriptor drop-down list, and a text field appears. Repeat step 2 for the new condition.
  - If you want to remove the last condition from the search query, click -. The bottom row is deleted. If you click - and the search query only contains one condition, no change occurs.
  - If you want to remove all of the conditions from the search query, click Clear Filter. All of the rows except the first row are deleted, and the first row is reset to the default value.
4. When you are done creating your search query, click Find. A list of external contacts that match all of the conditions appears (Figure 92).

Figure 92. External Contact— search query and results

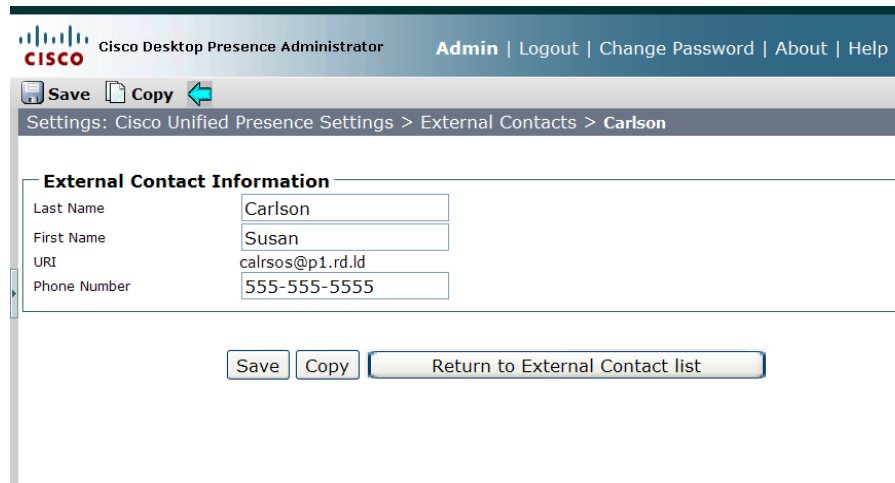
The screenshot shows the Cisco Desktop Presence Administrator web interface. At the top, there's a navigation bar with the Cisco logo, the title "Cisco Desktop Presence Administrator", and links for "Admin", "Logout", "Change Password", "About", and "Help". Below this is a "Save" button. The main content area is titled "Settings: Cisco Unified Presence Settings > External Contacts". It features a search bar with "Search For:" followed by a dropdown menu set to "Last Name", a "Begins With" dropdown, and a text input field. To the right of the search bar are "Find", "Clear Filter", and "+" and "-" buttons. Below the search bar is a table titled "External Contact List". The table has columns for "Selected", "Last Name", "First Name", "URI", and "Phone Number". One row is visible with the last name "Schmidt" (hyperlinked), first name "Carly", URI "schmic@p1.rd.id", and phone number "555-555-5555". Below the table are buttons for "Add New", "Select All", "Clear All", and "Delete Selected". At the bottom of the table area, there's a "Goto 1 of 1" link and a "Results Per Page 10" dropdown. A "Save" button is located at the bottom of the interface.

## Editing an External Contact

### *To edit an external contact:*

1. Choose Cisco Unified Presence Settings > External Contacts. The External Contacts page appears (Figure 90).
2. If you do not see the external contact you want to edit, use the search function to find the contact. For instructions, see ["Finding an External Contact" on page 182](#).
3. Select an external contact by clicking the user's last name. The page for the specific external contact (Figure 93).

**Figure 93.** External Contact page — specific user



The screenshot shows the Cisco Desktop Presence Administrator web interface. At the top, there is a navigation bar with the Cisco logo, the text 'Cisco Desktop Presence Administrator', and links for 'Admin', 'Logout', 'Change Password', 'About', and 'Help'. Below the navigation bar, there is a breadcrumb trail: 'Settings: Cisco Unified Presence Settings > External Contacts > Carlson'. The main content area is titled 'External Contact Information' and contains a form with the following fields: 'Last Name' (Carlson), 'First Name' (Susan), 'URI' (calrsos@p1.rd.id), and 'Phone Number' (555-555-5555). At the bottom of the form, there are three buttons: 'Save', 'Copy', and 'Return to External Contact list'.

4. Change the user's last name, first name, or phone number by typing new information in the corresponding field.
5. When you are finished making changes, click Save, then click Return to External Contacts list.

## Deleting an External Contact

### *To delete an external contact:*

1. Choose Cisco Unified Presence Settings > External Contacts. The External Contacts page appears (Figure 90).
2. If necessary, search for the external contacts that you want to delete. For instructions, see ["Finding an External Contact" on page 182](#).

3. Select the check box corresponding to one or more external contacts, then click Delete Selected. The selected external contacts are no longer displayed in the list of external contacts. However, the actual deletion is not performed until you click Save.



## Configuring Work Flow Groups

Use the Work Flow Groups node to add the contact lists that you create to work flow groups. You can assign up to 25 contact lists to a work flow group. For the limits on the number of SMEs in a contact list, see ["Configuring Contact Lists" on page 171](#).

**NOTE:** You cannot create work flow groups or assign work flow groups to agents in Desktop Administrator. You must create and assign work flow groups in Desktop Work Flow Administrator.

Use the Work Flow Groups node to complete the following tasks.

- [Finding a Work Flow Group \(page 185\)](#)
- [Adding a Contact List to a Work Flow Group \(page 186\)](#)
- [Selecting Agents to Appear Offline \(page 188\)](#)

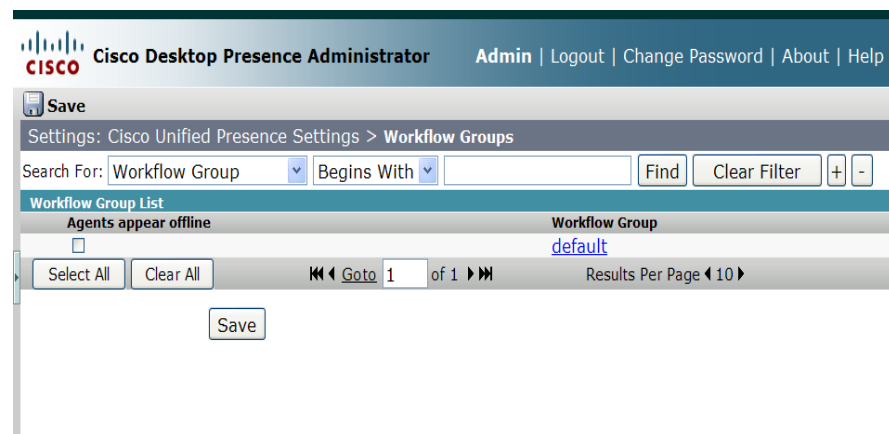
### Finding a Work Flow Group

**NOTE:** Searches are not case sensitive. For example, if you type a lowercase letter “s” in a search field, the results will include all items that begin with the lowercase letter “s” and the uppercase letter “S.”

*To find a work flow group:*

1. Choose Cisco Unified Presence Settings > Work Flow Groups. The Work Flow Groups page appears ([Figure 94](#)).

**Figure 94.** Work Flow Groups page



2. Create a search query using one or more conditions as described below.
  - If you want to search for work flow groups by name, select Work Flow Group from the field drop-down list and any item from the criterion drop-down list, then type one or more characters in the text field.
  - If you want to search for work flow groups for which agents appear offline, select Agents appear offline from the field drop-down list and True from the criterion drop-down list.
  - If you want to add another condition to the search query, click +. A new row containing the field drop-down list, the descriptor drop-down list, and the text field appears. Define the new condition as described above.
  - If you want to remove the last condition from the search query, click -. The bottom row is deleted. If you click - and the search query only contains one condition, no change will occur.
  - If you want to remove all of the conditions from the search query, click Clear Filter. All of the rows except the first row are deleted, and the first row is reset to the default value.
3. When you are finished creating your search query, click Find. A list of work flow groups that match all of the conditions appears.

## Adding a Contact List to a Work Flow Group

### *To add a contact list to a work flow group:*

1. Choose Cisco Unified Presence Settings > Work Flow Groups. The Work Flow Groups page appears ([Figure 94](#)).
2. If necessary, search for the work flow group to which you want to add a contact list. For instructions, see ["Finding a Work Flow Group" on page 185](#).

3. Select a work flow group by clicking the name of the group. The page for the selected work flow group appears (Figure 95).

**Figure 95. Specific work flow group page**

The screenshot shows the Cisco Desktop Presence Administrator interface. The breadcrumb trail is 'Settings: Cisco Unified Presence Settings > Workflow Groups > default'. The search bar shows 'Contact List Name' and 'Begins With'. The table below lists contact lists with checkboxes in the 'Included' column.

Contact List Name	Included
Manufacturing	<input type="checkbox"/>
Marketing	<input type="checkbox"/>
Operations	<input type="checkbox"/>
R&D	<input type="checkbox"/>
Sales	<input type="checkbox"/>
Team 01	<input type="checkbox"/>
Team 02	<input type="checkbox"/>

Buttons: Select All, Clear All, Goto 1 of 1, Results Per Page 10, Save, Return to Workflow Group list.

4. If necessary, search for the contact lists you want to add to the selected work flow group. For instructions, see ["Finding a Contact List" on page 172](#).
5. Add up to 25 contact lists by selecting the corresponding check boxes in the Included column (Figure 96). To select all of the contact lists, click Select All.

**Figure 96. Specific work flow group page — several contact lists selected**

The screenshot shows the same interface as Figure 95, but with several contact lists selected in the 'Included' column.

Contact List Name	Included
Manufacturing	<input checked="" type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>
Operations	<input checked="" type="checkbox"/>
R&D	<input type="checkbox"/>
Sales	<input type="checkbox"/>
Team 01	<input type="checkbox"/>
Team 02	<input checked="" type="checkbox"/>

Buttons: Select All, Clear All, Goto 1 of 1, Results Per Page 10, Save, Return to Workflow Group list.

6. Repeat step 4 and step 5 if you want to find and add additional contact lists to the selected work flow group.
7. When you are finished adding contact lists, click Save, then click Return to Work Flow Group list.

## Selecting Agents to Appear Offline

You can configure agents within a work flow group to appear as offline to SMEs in the Contact Selection window.

*To select agents within a work flow group to appear offline:*

1. Choose Cisco Unified Presence Settings > Work Flow Groups. The Work Flow Groups page appears ([Figure 94](#)).
2. Select the Agents appear offline check box that corresponds to the work flow group that contains the agents you want to appear as offline in the Chat Selection window.
3. Click Save when finished.

---

# Configuring Agent E-Mail

# 7

---

## Introduction

Agent E-Mail can be configured only if you have the Premium package. The Agent E-Mail Settings node is not displayed if you have the Standard or Enhanced package.

## Prerequisites

Before the Agent E-Mail feature can function, there are settings that must be configured in Microsoft Exchange and Cisco Unified CCX Application Administration.

- Microsoft Exchange: Set up the Agent E-Mail user account, distribution lists, and mailboxes
- Unified CCX Application Administration: Set up CSQs and skills

See “Configuring Agent E-Mail” in the *Cisco CAD Installation Guide* for information on setting up these prerequisites, and for information on how the Agent E-Mail feature manages customer e-mails and agent replies to those e-mails.

## Overview

Configuring Agent E-Mail in Desktop Administrator consists of the following tasks.

- [Configuring Global Settings \(page 191\)](#)
- [Configuring Contact Service Queue Settings \(page 194\)](#)
- [Configuring Templates \(page 196\)](#)

Customers can send e-mail to e-mail addresses assigned to specific customer service queues. The CSQs funnel the customer e-mails to agents who service those CSQs.

Agents put themselves in the E-Mail Ready state to receive customer e-mail. Going into the E-Mail Ready state signals Agent Desktop to deliver the configured number of customer e-mails to the agent’s desktop. Depending on how it is configured, an agent

can work on up to 5 customer e-mails at a time. The agent can also take the following actions:

- Re-queue the e-mail if the agent wants it to be handled by another agent in the same CSQ.
- Transfer the e-mail to a different, more appropriate CSQ.
- Save the e-mail as a draft so it can be worked on at a later time.
- Delete the e-mail, which actually transfers the e-mail to a specific e-mail address where supervisors can evaluate it for true deletion or for re-queueing if it needs to be handled.
- Send their response to the customer. Their response can include boilerplate text inserted from templates and attached files of any format.

The system can be configured to send an automated response to every customer e-mail, retention periods for keeping e-mail in the e-mail store, and other settings.

## Configuring Global Settings

You can configure the following settings on the Global Settings page of the Agent E-Mail Settings node:

- IMAP server information
- SMTP server information
- Other global settings

**To configure global e-mail settings:**

1. Choose Agent E-Mail Settings > Global Settings. The Global Settings page appears (Figure 97).

**Figure 97. Global Settings page**

The screenshot shows the Cisco Desktop Administrator interface. The top navigation bar includes the Cisco logo, the title 'Cisco Desktop Administrator', and user options: 'admin | Logout | Change Password | About | Help'. Below the navigation bar is a 'Save' button and a breadcrumb trail: 'Settings: Agent E-Mail Settings > Global Settings'. The main content area is titled 'Mail Server Settings' and includes a note: 'NOTE: After changing the IMAP or SMTP host name/IP address, all open instances of Agent Desktop must be restarted for the change to take effect. If not restarted, e-mail errors might occur.' There are two sections: 'IMAP Server' and 'SMTP Server'. Each section has four input fields: 'Host/IP Address' (10.192.252.18), 'Port' (143), 'User Name' (userdemo), and 'Password' (masked with asterisks). Below these is the 'Other Settings' section, which includes: 'Maximum Number of E-Mails on Agent desktop' (a dropdown menu showing '5'), 'Retention Period for E-Mails Sent and Handled (Days)' (a text box with '30'), 'Retention Period for E-Mails Pending Delete and System Status (Days)' (a text box with '30'), 'Enable Outbound Attachments' (a checked checkbox), 'Enable Re-queue of E-mails on Agent Logout' (a checked checkbox), 'Maximum Outbound Attachments size (MB)' (a text box with '10'), and 'Forwarding Address for Deleted E-Mails' (an empty text box). A 'Save' button is located at the bottom of the form.

2. Complete the fields as described below.

Field	Description
<b>IMAP Server</b>	
Host/IP Address	The hostname or IP address of the Internet Message Access Protocol (IMAP) server.

Field	Description
Port	The port used to access the IMAP server.
User Name	User name required to gain access to the IMAP server.  <b>NOTE:</b> If the account you are using to log in to IMAP is an NT domain account, the login must be specified as NTDOMAIN/NTACCOUNT/ALIAS. For example, if your e-mail address is Jane.Doe@mydomain.com and your Windows NT login name is jdoe, then your NT domain name is mydomain and your Microsoft Exchange mailbox name is Jane.Doe. You would use the username mydomain/jdoe/Jane.Doe when logging in to the IMAP server.
Password	Password required to gain access to the IMAP server.  <b>NOTE:</b> Supported authentication mechanisms are Basic Authentication (plainTextLogin) and Secure Password Authentication (SecureLogin) with SSL encryption.
<b>SMTP Server</b>	
Host/IP Address	The hostname or IP address of the Simple Mail Transfer Protocol (SMTP) server.
Port	The port used to access the SMTP server.
User Name	User name required to gain access to the SMTP server.
Password	Password required to gain access to the SMTP server.  <b>NOTE:</b> Supported authentication mechanisms are Open Relay and Basic Authentication over non-encrypted connections. SSL/TLS (Secure Socket Layer/Transport Layer Security) is not supported.
<b>Other Settings</b>	
Maximum Number of E-Mails on Agent Desktop	The maximum number of e-mails an agent can have on the desktop at any one time. Minimum is 1, maximum is 5. The e-mails can be in draft or in process.
Retention Period for E-Mails Sent and Handled (Days)	The number of days that sent and handled e-mails are retained in the mail store. After the time period is up, the sent and handled e-mails are permanently deleted from the mail store.



Field	Description
Retention Period for E-Mails Pending Delete and System Status (Days)	The number of days that pending delete and system status e-mails are retained in the mail store. After the time period is up, the e-mails are permanently deleted from the mail store.
Enable Outbound Attachments	Select this check box to allow agents to attach files to outgoing e-mails. The files can be of any format allowed by the mail server.
Enable Requeue of E-Mails on Agent Logout	Select this check box to requeue all e-mails assigned to an agent to the same CSQ when the agent logs out or closes Agent Desktop so that other agents in the Ready state can work on them. The agent will lose any drafts in progress at the time of the logout.  <b>NOTE:</b> In the event of a failover, even though the agent is automatically logged out of Agent Desktop, the agent's e-mails will not be requeued if this option is enabled. The agent will be able to continue working on the e-mails after failover.
Maximum Outbound Attachment Size (MB)	The maximum size of a file, in MB, that agents can attach to an outgoing e-mail. The default value is 10 MB, and the maximum allowed size is 50 MB.  <b>NOTE:</b> This value must not exceed the maximum outbound attachment size limit set in the Microsoft Exchange Server, if that is less than 50 MB.
Forwarding Address for delete E-Mails	Optional. An external e-mail address to which all agent-deleted e-mails are sent. An administrator or supervisor can then review the deleted e-mails using a third-part e-mail client and determine if they should be re-queued or permanently deleted.

3. Click Save to save your changes.

## Configuring Contact Service Queue Settings

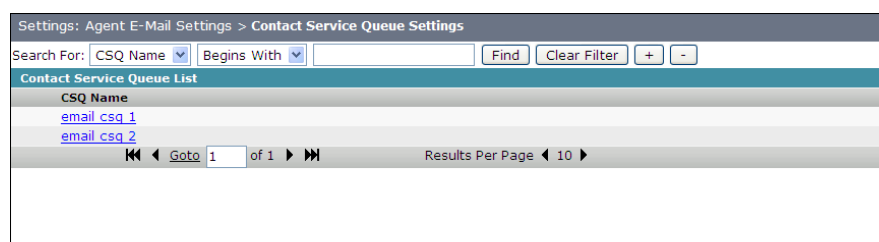
Use the Contact Service Queue Settings page to configure how e-mail that is sent to specific CSQs is handled.

### Finding a CSQ

*To find a specific CSQ:*

1. Choose Agent E-Mail Settings > Contact Service Queue Settings. The Contact Service Queue List page appears ([Figure 98](#)). This page contains a list of all the E-Mail CSQs configure in Unified CCX.

**Figure 98.** Contact Service Queue List page

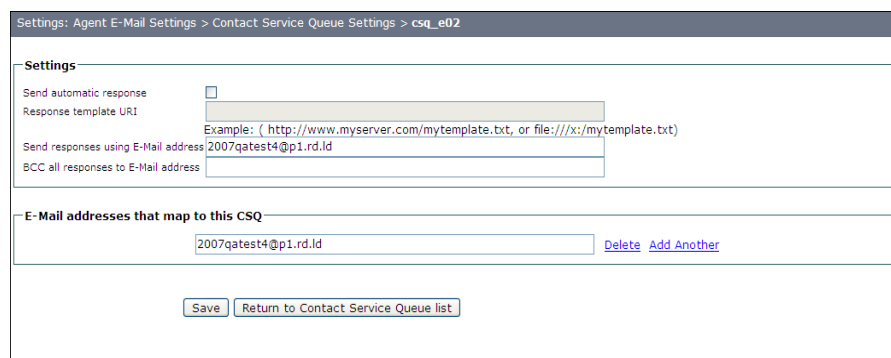


2. If necessary, search for the contact service queue you want to edit. For instructions, see ["Using the Search Function" on page 145](#).

### Configuring a CSQ

1. When you have found the contact service queue you want to configure, click its name. The settings page for the selected contact service queue appears.

**Figure 99.** Contact Service Queue Settings page



2. Complete the fields as described below.

Field	Description
<b>Settings</b>	
Send Automatic Response	<p>Select this check box if you want to send an automated response to all who send an e-mail to this CSQ.</p> <p>Note that when sending a single e-mail to multiple addresses that are mapped to multiple e-mail CSQs, only one of the CSQs will get the e-mail, and therefore only the single auto-response will be sent if configured for that CSQ.</p>
Response Template URI	<p>The Uniform Resource Indicator (URI) of the automated response. This field is enabled only if you select Send Automatic Response. URIs should follow either of these formats:</p> <ul style="list-style-type: none"> <li>• http://www.myserver.com/mytemplate.txt</li> <li>• file:///x:/mytemplate.txt</li> </ul> <p>File URIs must be accessible from the CAD server(s) and is limited to a maximum of 64 characters.</p>
Send responses using E-Mail address	The e-mail address from which both agent and automated responses are sent.
BCC all responses to E-Mail address	<p>The blind carbon copy (BCC) e-mail address to which all agent responses to customer e-mail is sent.</p> <p><b>NOTE:</b> CAD will not route e-mail based on an address in the BCC field. The CSQ e-mail address must be in the TO field in order for e-mail to be routed correctly.</p>
<b>E-Mail addresses that map to this CSQ</b>	
	<p>The one or more e-mail addresses that map to the contact service queue. E-mail addresses are case sensitive. Any e-mail sent to these addresses is routed to agents assigned to the CSQ. These e-mail addresses are the addresses of distribution groups set up in Active Directory, each of which contains only one member, the e-mail address set up as the Agent E-Mail user in Active Directory. See the <i>Cisco CAD Installation Guide</i> for information on setting up the user and distribution groups.</p>

3. Click Save to save your changes.

## Configuring Templates

Templates are text files that agents can insert into their responses to customer e-mails. They enable agents to answer common e-mail questions and problems with consistent and accurate answers. You can add up to 50 templates for agents to use.

Use the Templates page on the Agent E-Mail Settings node to complete the following tasks.

- [Adding a Template \(page 196\)](#)
- [Choose Agent E-Mail Settings > Templates. The Template List page appears \(Figure 100\). \(page 198\)](#)

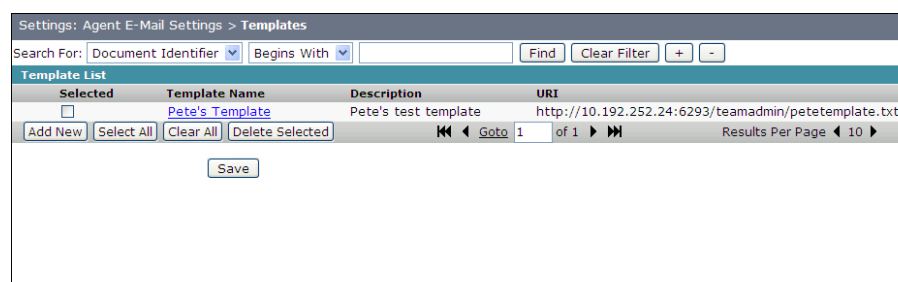
**NOTE:** You must have access to the Unified CCX server in order to create a template URI.

### Adding a Template

*To add a template:*

1. Choose Agent E-Mail Settings > Templates. The Template List page appears ([Figure 100](#)).

**Figure 100.** Template List page



- Click Add New. The Add New page appears (Figure 101).

**Figure 101. Add New page**

Settings: Agent E-Mail Settings > Templates > Add New

**Template Information**

Template Name

Description

URI

Example: ( http://www.myserver.com/mytemplate.txt, or file:///x:/mytemplate.txt)

- Complete the fields as described below.

Field	Description
Template Name	The name that identifies the template. Maximum length = 64 characters.
Description	A description of the template. Maximum length = 64 characters.
URI	<p>The Uniform Resource Indicator of the template. Maximum length = 64 characters. The URI must be accessible from all agent desktops that use the Agent E-Mail feature. The URI can follow these formats:</p> <ul style="list-style-type: none"> <li>http://www.myserver.com/mytemplate.txt This protocol is used for webserver files.</li> <li>file:///x:/templates/mytemplates.txt This protocol is used only when the network share is mapped to the same drive letter on all agent desktops.</li> <li>file:///fileServer/share/templates/mytemplate.txt This protocol is used when the network share is not mapped to the same drive letter on all agent desktops.</li> </ul> <p><b>Note:</b> URIs using the file:/// or file:/// protocol are not validated. You must ensure that the correct path is entered. URI validation for the http:// protocol is performed.</p>

- Click Save to save your changes. The template is added to the Template List.

## Copying a Template

You can copy the information of an existing template and then customize that information for a new template. You might want to do this if the name, description, and/or URI of a new template is very similar to the name, description, and/or URI of an existing template.

### *To copy a template:*

1. Choose Agent E-Mail Settings > Templates. The Template List page appears ([Figure 100](#)).
2. If necessary, search for the template you want to copy. For instructions, see ["Using the Search Function" on page 145](#).
3. Select the template you want to copy. The Template Information page appears.
4. Click Copy. The Template Information page now shows the template name as "Copy of <original template name>" and the description as "Copy of <original template description>". The original template's URI is also displayed.
5. Customize the template information fields to be appropriate for the new template, and then click Save. The new template is now listed in the Template List page.

## Deleting a Template

### *To delete a template:*

1. Choose Agent E-Mail Settings > Templates. The Template List page appears. ([Figure 100](#))
2. If necessary, search for the template you want to delete. For instructions, see ["Using the Search Function" on page 145](#).
3. Select the check box corresponding to one or more templates, then click Delete Selected. The selected templates are no longer displayed in the Template list. However, the actual deletion is not performed until you click Save.

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