



## Getting Started

Cisco Desktop Product Suite 4.6 (IPCC)

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# Introduction

# 1

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## What is Cisco Desktop Product Suite?

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Cisco Desktop Product Suite is a computer telephony integration solution for contact centers that is easy to deploy, configure, and manage. It provides contact center agents and supervisors with powerful tools to increase agent productivity, improve customer satisfaction, and reduce contact center costs.

### System Components

The Cisco Desktop Product Suite consists of these major components:

- Desktop Administrator
- Agent Desktop
- Supervisor Desktop
- Servers

**NOTE:** The following descriptions apply to the functionality available in the Enhanced Bundle. Not all of these features are available in the Standard Bundle. See "Product Bundles" on page 1-4 for more information on the differences between the Standard and Enhanced Bundles.

### Desktop Administrator

Desktop Administrator provides centralized administration to define work flow and the look and feel of the agent's desktop. It allows fast and easy setup and changes to CTI services because it requires no low-level coding. An administrator, not a programmer, uses keystroke macros to build screen pop actions and simple clicks to design the look and feel of the agent's toolbar. Desktop Administrator's client-server architecture supports remote administration from a single PC. It also supports multiple administrators, each responsible for different groups.

## Agent Desktop

Agent Desktop pops screens on the agent PC when the call arrives, increasing the speed of call processing. Agent Desktop populates any sort of third-party application (databases, help desk packages, personal information managers, etc.) based on the calling number, called number, or information that a VRU collects. The screen pop can use a combination of elements.

The Agent Desktop **soft phone** allows agents to control calls from the PC. It minimizes keystrokes and saves time for agents working simultaneously with the phone, CTI desktop, and third-party applications. The soft phone **toolbar** automates common telephony functions, including answer, drop, and speed dial. The toolbar also includes a **taskbar**, which launches applications based on telephony or data events. Agents select from up to 10 predefined task buttons to update CRM data and other applications, as well as initiate automated after-call tasks, such as sending an email or fax, or initiating call-handling scripts or other Windows-based tools.

The soft phone also features a **phone directory**, which enables agents to manage contact numbers on their desktop, both globally and by group. The agent initiates dialing from a directory listing, which increases accuracy and saves time. The soft phone **call log** tracks and displays up to seven days' worth of agent call activity to the desktop. The agent can sort the call log based on user-defined parameters, such as call in/out, call duration, or number calling. All call log data can be exported for future use. Call log capabilities help contact center managers analyze call traffic to measure agent productivity and make staffing or work flow changes.

**Call/Chat** allows agents and supervisors to communicate in writing or “chat” during a call. Chatting allows an agent to confer with another agent during a conference call or with a supervisor for assistance at any time without leaving their desks or putting a caller on hold.

## Supervisor Desktop

Supervisor Desktop allows contact center supervisors to view and direct agent activity in real time. Without leaving their desks, supervisors can observe, coach, and communicate with agents in writing, view agent status details, as well as view conference information. Without the caller's knowledge, supervisors can initiate “chat” sessions to coach agents on how to handle customer issues. Marquee message, instant broadcast messages to all agents or teams of agents, enable supervisors to impact agent activities in general.

Supervisors can also use the real-time audio monitoring capabilities to listen to agent conversations with customers. If necessary, they can “barge-in” to calls—conference themselves into the conversation—or “intercept” a call—transfer a call to themselves.

## Servers

The Cisco Desktop Product Suite includes these servers:

- **Call/Chat Server.** The Call/Chat server handles the communication between supervisor and agents (marquee messages and chat) and among agents (chat). It also enables the supervisor's intercept and barge-in actions, the supervisor's ability to change an agent's states, and the supervisor's and agent's ability to start recording a call.
- **Enterprise Server.** The Enterprise server tracks a call over its life and maintains a list of call information, including the peripheral and expanded call context (ECC) variable values. The Enterprise server makes this information available to Agent Desktop in screen pops, and can also allow Agent Desktop to update it.
- **Directory Services Server.** The Directory Services server maintains the agent and supervisor profiles.
- **Directory Services Sync Server.** The Directory Services Sync server ensures that the Directory Services database stays in sync with the ICM database, so that agent, supervisor, team, and skill group information is up to date.
- **LDAP Monitor Server.** The LDAP Monitor server is responsible for starting and keeping the LDAP server running.
- **IP Phone Agent Server.** The IP Phone Agent server enables IP phone agents to log in and out of ICM, change agent state, and enter wrapup data and reason codes without having the Agent Desktop software.
- **Recording and Statistics Server.** The Recording and Statistics server works with the Voice-Over IP Monitor server to record conversations. It also stores a detailed account of agent activity, including times and durations of calls and changes in agents' ACD states.
- **Replication Server.** The Replication server is installed only if you install a secondary Directory Services server. It handles the communications between the primary and secondary Directory Services servers so that the information contained on them is identical.
- **Voice-Over IP Monitor Server.** The Voice-Over IP Monitor server captures a call's voice packets. If the supervisor decides to monitor a call, it directs an instance of the voice conversation to the supervisor's PC. If a supervisor or agent decides to record a call, it assembles the digitized speech from the voice packets into a file and stores it.

## Product Bundles

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Cisco Desktop Product Suite 4.4 offers two different bundles, the Standard Bundle and the Enhanced Bundle.

The Enhanced Bundle offers the full range of functionality described in the section "What is Cisco Desktop Product Suite?" on page 1-1.

The Standard Bundle offers the same basic functionality, with these exceptions:

- **Agent Desktop.** No task buttons enabled.
- **Desktop Administrator.** No work flow automation or Agent Desktop interface customization.

The Cisco Desktop Product Suite 4.4 documentation describes the full functionality offered by the Enhanced Bundle.

## **What's New in This Version**

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Version 4.6 adds the following capabilities to the Cisco Desktop Product Suite:

- Devices can now be monitored by a default VoIP Monitor server, a specific VoIP Monitor server, or via desktop monitoring, as configured in Desktop Administrator.
- VoIP Monitor servers can be removed from LDAP through Desktop Administrator.
- The IPCC Cisco Outbound Option feature is available to desktop agents.
- IP Phone Agent can be configured so that agent logins and passwords can be alphanumeric or numeric.

## Getting Help

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### Documentation

The Cisco Desktop Product Suite comes with documents that include the following:

- *Getting Started*, an introduction to the Cisco Desktop Product Suite;
- *Installation Guide*, an in-depth guide to installing and removing Cisco Desktop applications;
- *Cisco Desktop Administrator User Guide*, an in-depth guide to administering Cisco Desktop applications;
- *Cisco Agent Desktop User Guide*, an in-depth guide to using Agent Desktop.
- *Cisco Supervisor Desktop User Guide*, an in-depth guide to using Supervisor Desktop.
- *Service Information*, which includes all reference information, such as release notes, technical package information, logs and error codes, and troubleshooting.

### Online Help

Online help is available in each application, either through the Help menu, or as context-sensitive help. Pressing F1 from any screen displays the online help for that window.

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# System Overview

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## A Typical Call

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Cisco Desktop typically operates in this pattern:

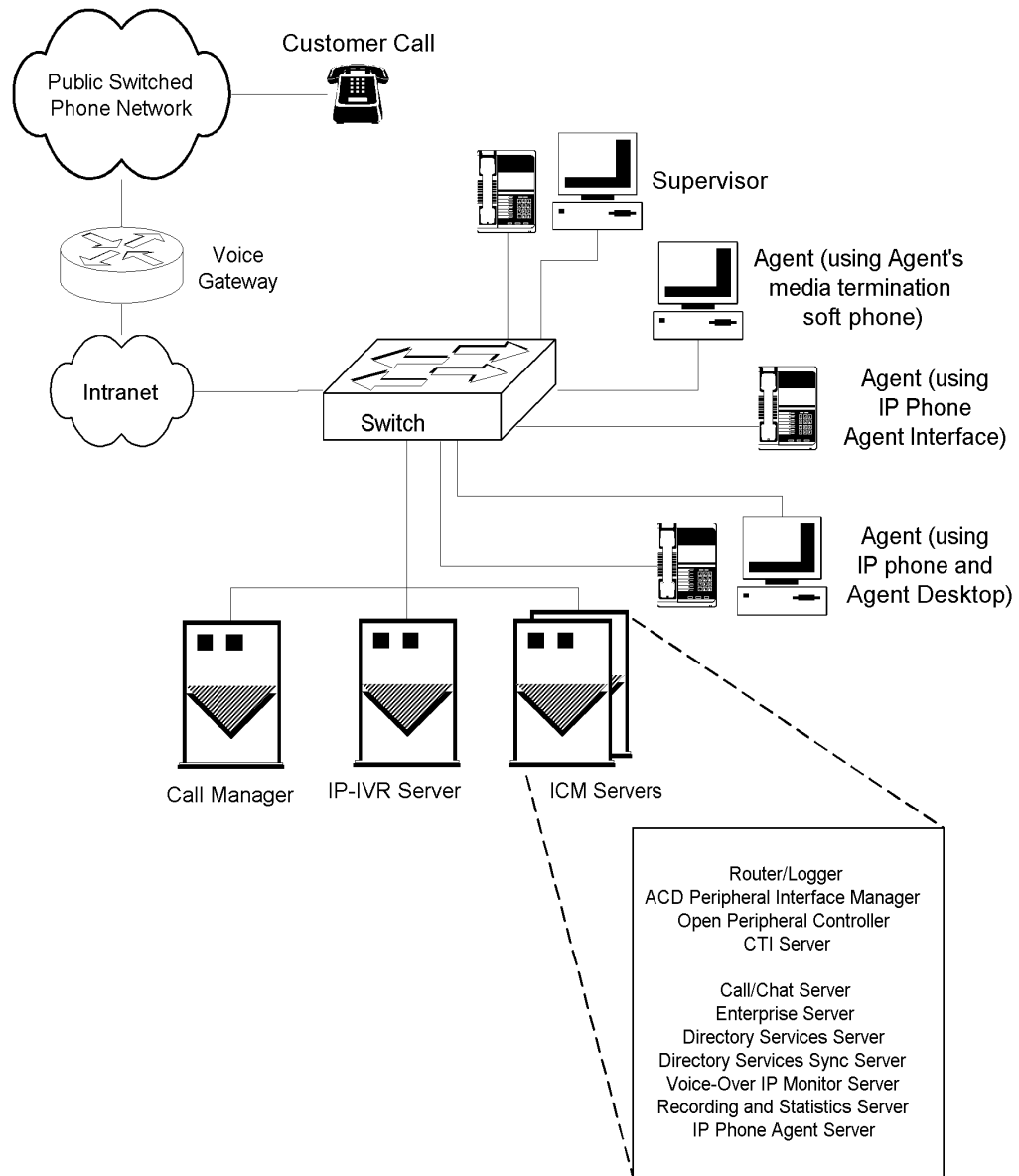
1. The customer dials the contact center.
2. Based on the dialed number, the public switched telephone network directs the call to the voice gateway for the IP Contact Center (IPCC).
3. The gateway notifies the Call Manager that the call has arrived, passing the call information, and asks the Call Manager to determine a destination for the call.
4. The Call Manager issues a route request to the Intelligent Contact Manager (ICM) call router via the peripheral gateway.
5. The call router executes a routing script and, as a result, instructs the Call Manager to direct the call to the IP Interactive Voice Response (IP IVR).
6. The Call Manager negotiates a connection for the call between the gateway and the IP IVR.
7. The IP IVR plays a greeting and an automated attendant for the caller, and perhaps collects an account number or other data needed for routing.
8. The IP IVR sends the collected information to the call router.
9. The call router determines the skill group that should handle the call. If it finds that no agents are available, it queues the call. It sends instructions to the IP IVR to play a voice script for service in queue.
10. The IP IVR plays the voice script for service in queue to the caller.
11. When an agent becomes available for the call, the call router notifies the IP IVR to stop playing the service in queue voice script and to transfer the caller to the agent.
12. The IP IVR requests the Call Manager to negotiate the transfer to the agent's telephone.

13. The Call Manager negotiates the connection between the gateway and agent telephone. At the same time, Call Manager notifies the ICM CTI server via the peripheral gateway that the call is going to the agent.
14. The call connects to the agent's telephone. At the same time, the CTI server notifies the Agent Desktop application on the agent's PC that the call has gone to the agent's telephone. Agent Desktop then pops a screen on the agent PC.

## System Schematic

Figure 2-1 shows a schematic of the Cisco Desktop environment.

Figure 2-1. Cisco Desktop environment.





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### Automating the Call Center

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Planning is the key to successfully implementing Cisco Desktop in your contact center. Before you begin using Desktop Administrator, give careful thought to these three areas:

- Work flow groups
- Appearance and function of the Agent Desktop interface
- Screen pop and other work flow automation sequences

#### Work Flow Groups

Rather than requiring you to administer each agent individually, Cisco Desktop allows you to administer agents by “work flow groups.” A work flow group is a grouping of agents that have common requirements for the Agent Desktop interface, screen pop, and other work flow automation.

Although your work flow groups may correspond to your teams or skill groups, they exist independently of the teams and skill groups in Cisco Desktop and can be different from them. For instance, agents on two different teams may be in the same work flow group.

Review the sections, “The Agent Desktop Interface” and “Screen Pop and Other Work Flow Automation Sequences” below, then draw up a list of the groups that have common Agent Desktop interface and work flow automation needs.

#### The Agent Desktop Interface

Desktop Administrator allows you to determine which telephone and agent action buttons appear on the Agent Desktop interface, customize the button icons, and create custom buttons to automate actions unique to your contact center. In addition, you can choose when the Agent Desktop interface appears on the agent’s desktop.

See Chapter 3 in the *Cisco Desktop Administrator User Guide* to understand how to customize Agent Desktop, and then consider the following questions:

- When should Agent Desktop appear? Only when a call arrives? All the time? Only if the agent maximizes it?
- What standard phone actions should the agent be able to perform using Agent Desktop?
- What standard agent state changes should the agent be able to make using Agent Desktop?
- Are there any routine desktop activities where agents would be more efficient if they could start them with the click of a button? Examples might be to start recording a call, notify a supervisor of the need for assistance, or to initiate an email at the close of a call.

### **Screen Pops and Other Work Flow Automation**

Cisco Desktop provides work flow automation in three ways:

- Executing keystroke macros, where macro scripts created with Desktop Administrator's macro editor automatically perform sequences of actions.
- Executing an application and passing call information to it as command line parameters.
- Executing telephony or agent state change actions.

Consider the types of work flow automation that might raise your agents' productivity. For example, for a screen pop, ask the questions:

- When should the screen pop? On ringing, because an agent is always finished on one call before the next call arrives? On answer, because sometimes the agent finishes one call while the next call is ringing? At a time the agent determines, because agents occasionally complete entries for the previous call while they greet the current caller?
- What determines which screen is popped? The DNIS value? The presence or absence of account number information? The menu choice a caller made in the automated attendant?
- What information is necessary to make the screen pop, and what is the keystroke sequence involved?

Opportunities for work flow are not limited to screen pop. You might have situations where agents:

- Dial numbers from a database
- Always send a follow-up email or letter for certain types of calls
- Routinely copy items of information from a window in one application to another

- Transfer calls to or conference in agents from another group

Review the tutorials in the Chapter 6 of the *Administrative Guide* to gain a sense of the work flow automation administration and its possibilities.

