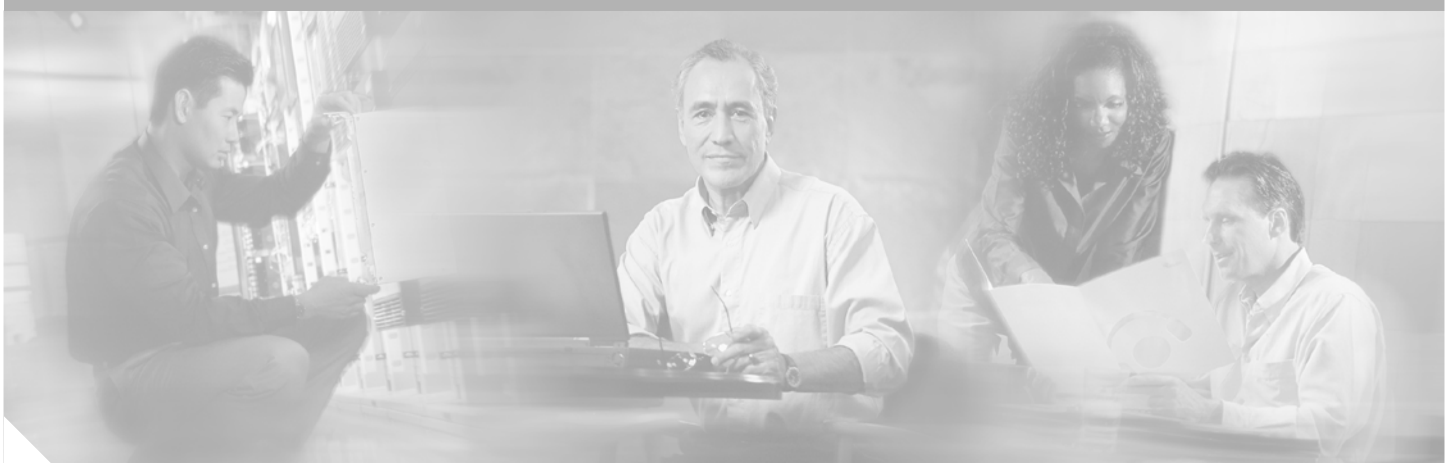

Cisco Agent Desktop User’s Guide

Cisco Desktop Product Suite 4.6 (IPCC)

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Contents

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Introduction

Agent Desktop is the portion of the Cisco Desktop Product Suite that resides on the agent's computer.

With Agent Desktop, you can control calls with your computer. The soft phone allows you to:

- Make calls
- Answer calls
- Transfer calls
- Make conference calls

Features

- The Agent Desktop soft phone features a phone directory that enables you to manage contact numbers on your desktop. You can initiate dialing directly from a phone book listing to increase call accuracy and save time.
- The soft phone call log tracks and displays call activity for up to seven days. You can sort the call log by user-defined parameters such as ingoing/outgoing calls, call duration, and number called.
- The agent log tracks changes in agent states and other agent information.
- The Call/Chat feature allows employees and supervisors to communicate in writing ("chat") during a call. Chatting allows you to confer with another employee during a conference call or with a supervisor for assistance at any time without leaving your desk or putting a call on hold.
- The Enterprise Data feature tracks a call as it connects to devices in the contact center and maintains a list of call information.

Agent Desktop Versions

Agent Desktop is available in two versions, Standard and Enhanced.

- Enhanced Agent Desktop includes task buttons on the tool bar. These buttons can be configured by the administrator to perform tasks such as starting and stopping recording or popping a third-party application. Enhanced Agent Desktop also includes the "Work" agent state, which is used when agents are performing wrapup work after a call.
- Standard Agent Desktop does not include the task buttons or the "Work" agent state.

Either version can include Media Termination.

Media Termination

If your version of Agent Desktop includes Media Termination, you can use the Agent Desktop soft phone to perform call functions. If your version does not include Media Termination, you must use a hard IP phone to perform call functions.

About This Document

Intended Audience

This document is written for contact center agents who use Agent Desktop on their computers.

Conventions

In this document, terminology and typographic conventions are as follows.

Terminology

- The word *enter* means to press the sequence of keys specified. For example, an instruction to enter the letter “y” is shown as

  Enter **y** to continue.

- The word *click* means to use your mouse to execute the action represented by a button. For example, an instruction to click the Next button is shown as

  Click **Next**.

- The words *check* and *uncheck* mean to activate or deactivate a check box. For example, an instruction to deactivate the Dial Number as Entered check box is shown as

  Uncheck the **Dial Number as Entered** check box.

- The word *choose* means to pick an option from a menu or submenu. For example, an instruction to choose the Desktop option from a series of submenus is shown as

  Choose **Start** > **Programs** > **Cisco** > **Desktop**.

- The word *select* means to mark text or other elements to be copied or cut. For example, an instruction to select text is shown as

  Select an entry from the list to edit.

- Simultaneous keystrokes (as when you hold down the first key, then press the second and third keys) are represented as a series of bolded key names joined by hyphens. For example, an instruction to press and hold the Alt key while pressing the letter “d” is shown as

  Press **Alt-d**

- Function keys are represented by the letter F followed by the function key number. For example, an instruction to press function key 3 is shown as

  Press **F3**.

Typography

- Commands and text you type, the names of windows, buttons, menus, and menu options appear in bold type:

  From the **Options** menu, choose **Local Admin**.

- Variables you must enter appear in italics:

  http://*servername*/appadmin

- Terms that are being defined appear in italics:

  Actions are commands that perform a task.

- Menu paths appear in bold type with menu options separated by right angle brackets:

  Choose **Options** > **Status Bar**.

Starting Agent Desktop

▶ **To start Agent Desktop:**

1. Click **Start > Programs > Cisco > Desktop > Agent**.

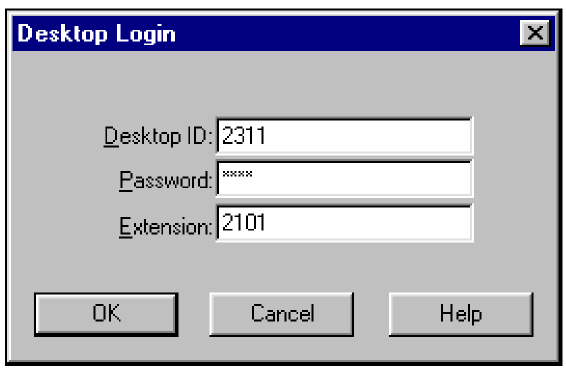
   The login screen appears. (See Figure 1.)

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

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

   Agent Desktop, Call/Chat, and Enterprise Data start and are immediately minimized on the taskbar at the bottom of your Windows desktop.

Figure 1. The Login dialog box.



Access Through a Virtual Private Network

Agent Desktop is able to connect to Cisco Desktop Product Suite servers through a virtual private network (VPN). This enables an agent to work remotely and still have the benefit of Agent Desktop's full functionality.

Cisco VPN 3000 Concentrator and Cisco VPN Client are required for access. Other VPNs may work, but only this configuration has been verified.

See your VPN user documentation for instructions on how to connect to the Cisco Desktop Product Suite servers.

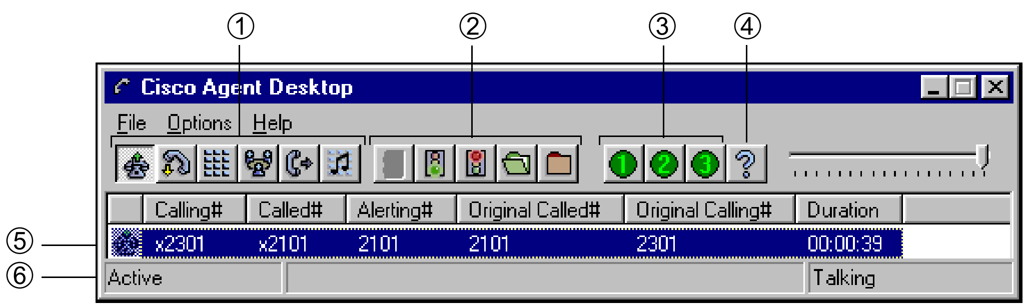
Agent Desktop Windows

The Main Window

The Agent Desktop main window displays information about active calls and enables you to perform phone functions.

> **NOTE:** If you lock your workstation or if you have a password-protected screensaver engaged, Agent Desktop will also be locked and will not function correctly. It is recommended that you close Agent Desktop if you need to lock your workstation.

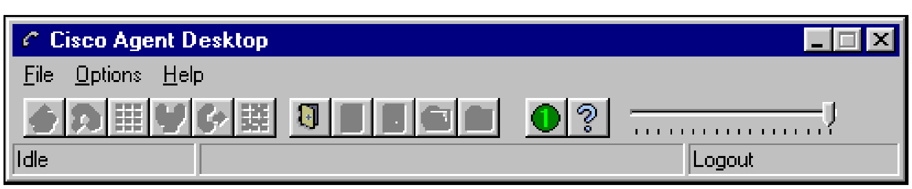
Figure 2. The Agent Desktop main window.



Key:
1 . . . . . Call control buttons
2 . . . . . Agent state buttons
3 . . . . . Task buttons (Enhanced version only)
4 . . . . . Help button
5 . . . . . Call information window
6 . . . . . Status bar

> **NOTE:** If your version of Agent Desktop includes Media Termination, a volume slider to the right of the toolbar controls call volume. (See Figure 3.)

Figure 3. Agent Desktop with Media Termination. (Note volume slider.)



The Menu Bar

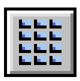
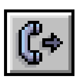
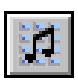
The Agent Desktop menu bar includes the following options.

File	
Logout/Login	Logs you out and in to Agent Desktop.
View	Accesses the Call Logs, Agent State Logs, and ACD Statistics (see "Viewing Logs and Statistics" on page 32).
Exit	Closes Agent Desktop.
Options (available only when your Administrator has enabled local administration)	
Window Behavior	Select how you want the Agent Desktop window to behave during the current session: ■ Normal (default): The window appears when calls are present and minimizes when idle. ■ Keep Open: The window remains open when idle. ■ Always on Top: The window remains open when idle and on top of all other open applications. ■ Stealth: The window appears as an icon in the system tray (lower right-hand corner of your desktop, next to the system clock) and doesn't appear unless double-clicked.
Local Admin	Enables you to set your local extension and view the the work flow group and team to which you are currently assigned by the administrator. It also shows the path to the work flow group configuration file. **Note**: This option is visible only if enabled by the system administrator.
Status Bar	Select or deselect to display the status bar on the interface.
Help	
Contents	Accesses the contents of the online help file.
About Cisco Agent Desktop	Displays the version and copyright information.

Call Control Buttons

The call control buttons (see Figure 2) enable you to perform phone functions.

Move your cursor over a Call Control button to view a tooltip describing its function.

Button	Name	Shortcut Key	Description
	Answer/Drop	Ctrl-A	Answers or drops the selected call.
	Hold/Unhold	Ctrl-H	Puts a selected call on hold or takes it off hold.
	Make Call	Ctrl-M	Displays the dial pad.
	Conference	Ctrl-F	Puts the active call on hold and adds other parties into a conference call.
	Transfer	Ctrl-T	Puts a selected call on hold and transfers it to a third party.
	Touch Tones	Ctrl-D	Sends touch tones during an active call. **Note:** No audible tones are generated.

Agent State Buttons

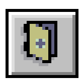
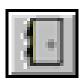
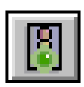
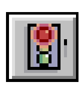
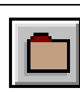
Agent state buttons (see Figure 2) enable you to change your current agent state on the Automatic Call Distribution (ACD) server.

Agent state buttons are active only if they are valid agent state choices from your current state. For instance, if your current state is Not Ready, the only buttons that are active are Ready and Logout.

You can click another agent state while on a phone call. When you hang up the call, your current state changes to the state you clicked while on the call.

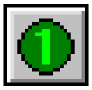
For more information on agent states, see "Agent States" on page 18.

Move your cursor over an Agent State button to view a tooltip describing its function..

Button	Name	Shortcut Key	Description
	Login	Ctrl-L	Logs you into the ACD server. (Toggles with **Logout**.)
	Logout	Ctrl-L	Logs you out of the ACD server. (Toggles with **Login**.)
	Ready	Ctrl-W	Changes your state to Ready, indicating that you are available to receive routed[1] calls.
	Not Ready	Ctrl-X	Changes your state to Not Ready, indicating that you are not available to receive routed calls.
	Work Ready	Ctrl-Y	Changes your state to Work Ready, indicating that you are in wrapup work after terminating a call and, when finished, will be available to receive routed calls.
	Work Not Ready	Ctrl-Z	Changes your state to Work Not Ready, indicating that you are in wrapup work after terminating a call and, when finished, will not be available to receive routed calls.

1. A routed call is one that comes in through the ACD server. A call that doesn't go through a route point (for instance, a call made to your direct phone number) is a non-routed call and not subject to these rules.

Task Buttons



Task buttons (see Figure 2) perform various functions (for example, running a macro, controlling a call, or launching an application). Up to ten task buttons (numbered 1 to 10) can appear on the toolbar, and each button may be assigned more than one action. Task buttons and the actions assigned to them are configured by the system administrator.

When you click a task button, Agent Desktop performs the actions assigned to that button. If more than one action is assigned, Agent Desktop performs them in sequence. (You can also use the shortcut key A-*button number* to actuate a button.)

> **NOTE:** Task buttons are not available in Standard Agent Desktop.

Move your cursor over a Task button to view a tooltip describing its function.

High-Priority Chat Message Task Button. You may have a task button configured to send a high-priority chat message to your supervisor(s). This chat message is a popup window containing a predefined message set up by your system administrator (for instance, “Please monitor my call”) that appears on your supervisor's desktop. You must be on a call to be able to send a high-priority chat message. Use Call/Chat for all other types of chat messages (see "Using Call/Chat" on page 31).

Outbound Option Task Buttons. If set up by your system administrator, you may have task buttons associated with Outbound Option actions. These buttons enable you to accept, skip, reject, and call back the outbound calls to customers generated by the system, and remove yourself from a calling campaign. Exactly which task buttons are associated with the Outbound Option actions is determined by your system administrator.

> **NOTE:** The Skip/Accept/Reject Call buttons are enabled only when the calling campaign is configured to use the Preview dialing mode. They are disabled in Predictive and Progressive dialing modes. The calling campaign dialing mode is configured by the system administrator.

The available Outbound Option actions are:

- **Accept Call.** When you accept the outbound call, the customer is dialed and transferred to you.
- **Skip Call**. When you skip the outbound call, you are presented with another customer call.
- **Reject Call**. When you reject the outbound call, you are released from the outbound calling reservation. At this point, the system may deliver to you another outbound call or a new inbound call.

- **Callback Call**. When you choose callback, the Callback Properties dialog box appears (see Figure 4). This dialog box enables you to set a date and time to call back the customer. The Callback Call action is enabled only if you are in a talking or wrapup state on an Outbound Option call.
- **Cancel Reservation**. When you choose the Cancel Reservation button, you are released from the calling campaign and placed in the Not Ready state. (To resume participating in the calling campaign, change your state to Ready.)

▶ **To schedule a customer callback:**

1. While in Talking or Wrapup state, click the task button associated with the Callback action.

   The Callback Properties dialog box appears, displaying data about the current customer call.

2. In the Schedule Callback section, enter a time and date to call back the customer.

   Be sure that the time you enter in the Customer's Time field is the time in the customer's location, not the time in your location.

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

3. Click **OK**.

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

   NOTE: The customer callback might not be made exactly at the time you scheduled it for if the clock on the computer hosting the ICM is set at a different time than the clock on your PC.

You can cancel a scheduled customer callback as long as you are still on the customer call (in Talking state) or in Wrapup state after that call.

▶ **To cancel a scheduled customer callback:**

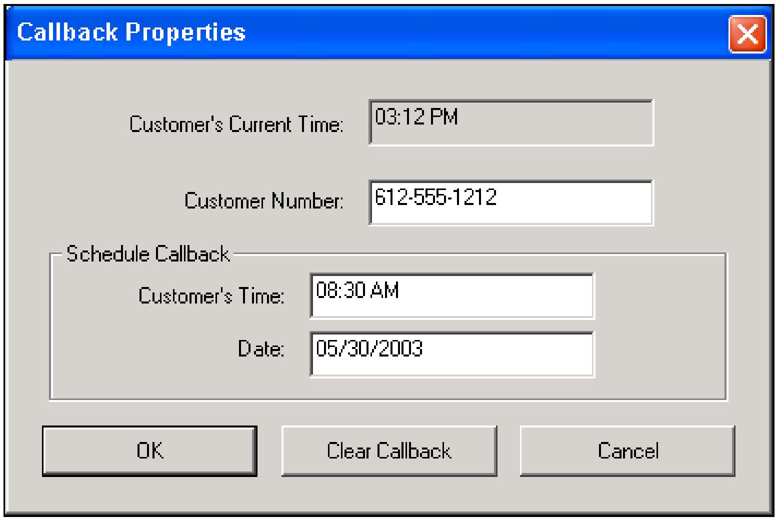
1. While in Talking or Wrapup state, click the task button associated with the Callback action.

   The Callback Properties dialog box appears, displaying data about the current customer call.

2. Click **Clear Callback**.

   The scheduled callback call is now cancelled.

Figure 4. The Callback Properties dialog box.



Callback Properties Dialog Box Fields

Field	Description
Customer's Current Time	The time at the customer's location.
Customer Number	The customer's phone number. Default is the phone number originally called; it may be changed to a different phone number if the customer requests it. You may enter the phone number in any format. The system reads only numbers and ignores all other symbols.
Customer's Time	The time, at the customer's location, to call the customer back. Format HH:MM using either a 12- or 24-hour format. If using the 12-hour format, you must enter AM or PM as well.
Date	The date to call the customer back, in MM/DD/YYYY format.
OK button	Schedules the callback call and closes the dialog box.
Clear Callback button	Cancels a previously-scheduled callback call. You must be in Talking or Wrapup state on the customer call you scheduled for callback for this function to work.
Cancel	Closes the dialog box without scheduling a callback call..

Call Information Pane

The call information pane (see Figure 2) shows details of active calls. Up to six fields may be visible, depending on how it is configured by the system administrator. Available fields are:

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

Notes on the Data Displayed in the Call Information Pane

- Some fields may display <unavailable> if the call information is unknown.
- When you retrieve a parked call, Agent Desktop displays it as a conference call. (See your Cisco IP phone documentation for information on parked calls.)
- Whenever the IP IVR is involved in a call, Agent Desktop displays the same information about the call in the call information pane as the IP phone displays on its screen. Enterprise Data may display different data because it tracks the entire life of the call.

Status Bar

The status bar (see Figures 1 and 2) is divided into three sections:

- The left panel displays the status of a selected call.
- The middle panel is blank.
- The right panel displays the current agent state.

If a message is too long to fit in a panel, double-click the panel to display a popup window showing the complete text.

If your system administrator has configured Agent Desktop so that local administration is enabled, you can use the Option menu to show or hide the status bar.

▶ **To show/hide the status bar:**

- Choose **Options > Status Bar.**

Resetting Your Local Extension

If your system administrator has enabled local administration, you can reset the phone extension that Agent Desktop monitors.

▶ **To reset your local extension:**

1. Choose **Options > Local Admin**.

   The **Local Setup** window appears.

2. Click the **Local Extensions** tab.
3. Enter the new phone number in the **Call Appearance** field, and then click **OK**.
4. Exit Agent Desktop.
5. Restart Agent Desktop.

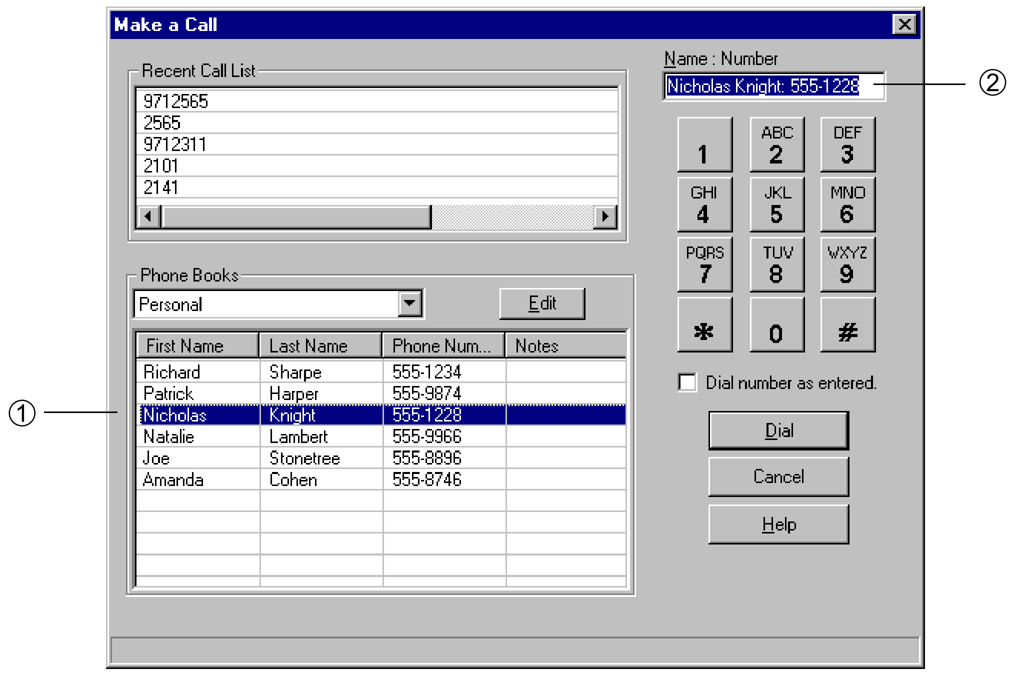
   Agent Desktop now monitors the new local extension.

The Dial Pad Window

The dial pad window (Figure 5) allows you to make calls either by entering a phone number or selecting an existing phone number from the recent call list or from a stored phone book.

> **NOTE:** The Dial Pad window is the general name for this window. Depending on what you are doing, the window title may be **Make a Call**, **Transferring a Call**, or **Conferencing**.

Figure 5. The dial pad window.



Key:

1 . . . . .Select a name and number from a phone book or the recent call list.

2 . . . . .The selected name and number appears in the Name:Number field ready to be dialed.

Recent Call List

When you dial a phone number, it is automatically entered into the recent call list (see Figure 5). This list stores up to 100 entries from most recent to least recent. As the number of entries exceeds 100, the oldest entries drop off the list.

Agent Desktop checks to prevent duplicate phone numbers from appearing in this list. However, if the same phone number is entered twice using different formats, for instance, **555-1212** and **5551212**, both numbers will appear on the list.

Phone Books

Phone books are phone number lists set up by you (your personal phone book) and the system administrator (public phone books). Click the drop-down arrow to choose the phone book you want to use.

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

Personal Phone Book

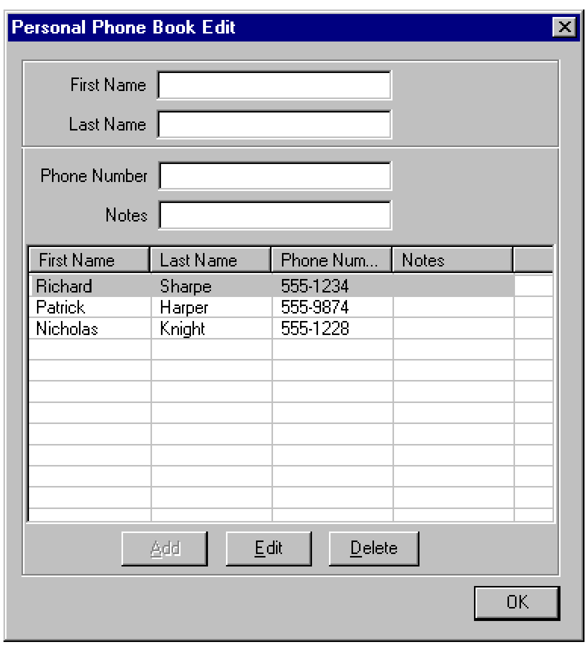
Your personal phone book is the only one you can edit. All others are controlled by the system administrator.

▶ **To edit your personal phone book:**

1. In the Dial Pad window, choose **Personal** from the Phone Books drop-down list, and then click **Edit**.

   The Personal Phone Book Edit window appears.

Figure 6. The Personal Phone Book Edit window.



2. Make one of the following edits:
   - To add a new entry to the list, complete the First Name, Last Name, and Phone Number fields and click **Add**. (The First Name, Last Name, and Notes fields are optional.)
   - To edit an existing entry, select it to display it in the edit fields, click **Edit,** and then make your changes.
   - To delete an entry from the list, select it, and then click **Delete**.
3. When all your edits are completed, click **OK**.

Name: Number Field

Use this field to enter the phone number you want to dial (see Figure 5). Entering a name is optional, but if one is entered, it must be followed by a colon and a space to separate it from the phone number:

John Doe: 555-1212

You may enter phone numbers with or without spaces, parentheses, and dashes. Agent Desktop ignores any non-alphanumeric characters.

You may also select a phone number from the Recent Call List or a phone book, which is then displayed in the Name: Number field.

Depending on how the system administrator has configured the dial plan, Agent Desktop may automatically add the local access and long distance access codes to numbers you enter. Contact your system administrator for details.

Dial Number as Entered Check Box

Check the Dial Number as Entered check box (see Figure 5) to circumvent any automatic formatting (local access and long distance access codes) and dial the number exactly as you enter it in the Name: Number field.

Agent States

Agent Desktop allows you to change your agent state in the ACD server through the use of the agent state buttons. (See "Agent State Buttons" on page 9.) Only the agent states that are valid choices from your current agent state will be available at any given time.

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

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

Available agent states are:

State	Description
Hold	You are on the phone with a customer and have the call on hold. This state is automatically set for you by the ACD and does not have a corresponding button.
Logout	You are logged out of the ACD server.
Not Ready	You are not available to receive routed calls. If you receive a non-routed call you are automatically put into the Not Ready state and then returned to the previous state when the call ends.
Ready	You are available to receive routed calls.
Reserved	You are temporarily "set aside" to receive a specific call. Your state changes to the Talking state when you answer the call. If you fail to answer the call within a time limit specified by the system administrator, the ACD server places you in a Not Ready state. The Reserved state is automatically set for you by the ACD server and does not have a corresponding button. You can be in this state without the phone ringing. (You are waiting for it to ring.)

State	Description
Talking	You are on the phone with a customer or another agent. This state is automatically set for you by the ACD server and does not have a corresponding button.
Work Not Ready	You are completing work from a previous call, and are unavailable to receive routed calls. You change to the Not Ready state when: ■ you enter wrapup data (if enabled by the system administrator) ■ a timer set in the ACD expires (if the ACD uses this feature) ■ you manually change state after you enter wrapup data
Work Ready	You are completing work from a previous call, and are unavailable to receive routed calls. You change to the Ready state when: ■ you enter wrapup data (if enabled by the system administrator) ■ a timer set in the ACD expires (if the ACD uses this feature) ■ you manually change state after you enter wrapup data

Reason Codes and Wrapup Data

Agent Desktop can be configured by the system administrator so that you are required to enter reason codes and/or wrapup data.

Reason Codes

Reason codes describe why you have transitioned to the Not Ready agent state or have logged out. These codes are set up by your system administrator and are customized for your contact center.

Whenever you initiate a transition to the Not Ready state, or log out, or such a transition is included in a work flow, a popup window appears. (See Figure 7.) You must select the appropriate code from that window and click OK in order to make the transition. If, however, your supervisor initiates the transition, you will not see the reason code window. (A reason code indicating that the supervisor forced the agent state change is automatically selected.)

Figure 7. The reason code window

Wrapup Data

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

Whenever you change to the Work Not Ready or Work Ready state, the wrapup data popup window appears. You must select the appropriate description that sums up the call outcome and click **OK** before you can continue.

> **NOTE:** If your PC has both Agent Desktop and Supervisor Desktop installed, you will not see the Wrapup Data dialog box. The assumption is that you are a supervisor, and supervisors do not need to enter wrapup data.

Handling Calls

You can use the soft phone built into Agent Desktop, a third-party soft phone, or a hard IP phone to handle calls. (If you have Agent Desktop with Media Termination, you must use the built-in soft phone.) Either type of call shows up in the Agent Desktop interface. The following sections assume you use the Agent Desktop interface (see Figure 2) to handle calls.

Answering a Call

You can receive both routed and non-routed calls through Agent Desktop. You must be logged in, and you must be in the Ready agent state, to receive a routed call; you can be in any state to receive a non-routed call.

If you do receive a non-routed call, you are automatically put in the Not Ready agent state and then returned to the previous state after the call ends.

▶ **To answer a call:**

- Click **Answer**.

▶ **To terminate a call:**

- Click **Drop**.

Making a Call

You must be in the Not Ready state to make a call. Use the Make Call button to make a call.

▶ **To make a call:**

1. Click **Make Call**.

   The Make a Call window appears.

2. Enter a number in the **Name: Number** field. You can enter a number by:

   - Using your PC keyboard
   - Dialing the number with the dial pad
   - Selecting an existing number from the Recent Call List or a phone book.

3. Click **Dial**.

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

When you enter the number, it doesn't matter whether you include dashes, parentheses, or spaces; only the numbers are read. Depending on how Agent Desktop is configured, you may not have to include the local access or long-distance access codes. Consult your system administrator for information.

Entering Touch Tones During a Call

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

▶ **To enter touch tones:**

1. When prompted to enter numbers during a call, click **Touch Tone**.

   The number pad appears.

2. Enter the required numbers and/or symbols. When finished, click **Done**.

   NOTE: You will not hear any tones when you enter the numbers.

   The number pad closes and you are returned to the Agent Desktop interface.

Entering Touch Tones During a Consultative Call

You can send touch tones during a consultative call (transferring or conferencing).

▶ **To enter touch tones during a consultative call:**

1. During a call, click the **Transfer** or **Conference** button.

   The Transferring Call window or Conferencing window appears.

2. Check the **Touch Tones** check box, and then enter the required number and/or symbols on the number pad.

   DTMF tones are generated.

   NOTE: You will not hear any tones when you enter the numbers.

3. Uncheck the **Touch Tones** check box.

   The touch tones function is disabled.

   NOTE: The Touch Tones check box is automatically disabled when you close the Transferring Call window or Conferencing window.

Transferring a Call

There are two types of transfer calls:

- **Supervised transfers.** In a supervised transfer, you speak to the third party to whom the call is being transferred before connecting the active call, in order to confirm that the transfer can be made successfully.
- **Blind transfers.** In a blind transfer, you transfer the active call to the third party without speaking. You hang up before the third party answers the phone and therefore can't confirm that the transfer was successful.

▶ **To transfer a call:**

1. With a call active, click **Transfer.**

   The Transferring Call window appears.

2. Enter the phone number to which you are transferring the call in the **Name: Number** field. You can enter a number by:
   - Using your PC keyboard
   - Dialing the number with the dial pad
   - Selecting an existing number from the Recent Call List or a phone book.
3. Click **Dial.**

   When the phone rings, the Dial button changes to the Transfer button.

4. Take one of the following actions:
   - For a supervised transfer, wait for the third person to answer the phone, announce the transfer, then click **Transfer**.
   - For a blind transfer, click **Transfer** without waiting for the third person to pick up the phone.

Making a Conference Call

You can add other parties to an active call to make a conference call.

▶ **To make a conference call:**

1. With a call active, click **Conference**.

   The **Conferencing** window appears.

2. Enter the phone number of the person you want to add to the call in the **Name: Number** field. You can enter a number by:
   - Using your PC keyboard
   - Dialing the number with the dial pad
   - Selecting an existing number from the Recent Call List or a phone book.
3. Click **Dial**.

   When the phone rings, the Dial button changes to the Add to Conf. button.
4. Take one of the following actions:
   - For a supervised conference, wait for the third person to answer the phone, announce the conference, then click **Add to Conf**.
   - For a blind conference, click **Add to Conf.** without waiting for the third person to pick up the phone.

   The Conferencing window closes.
5. To add one or more people to the conference call, repeat Steps 2 to 4 for each person.

Alternating Between Calls

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

Alternating Before Transferring a Call

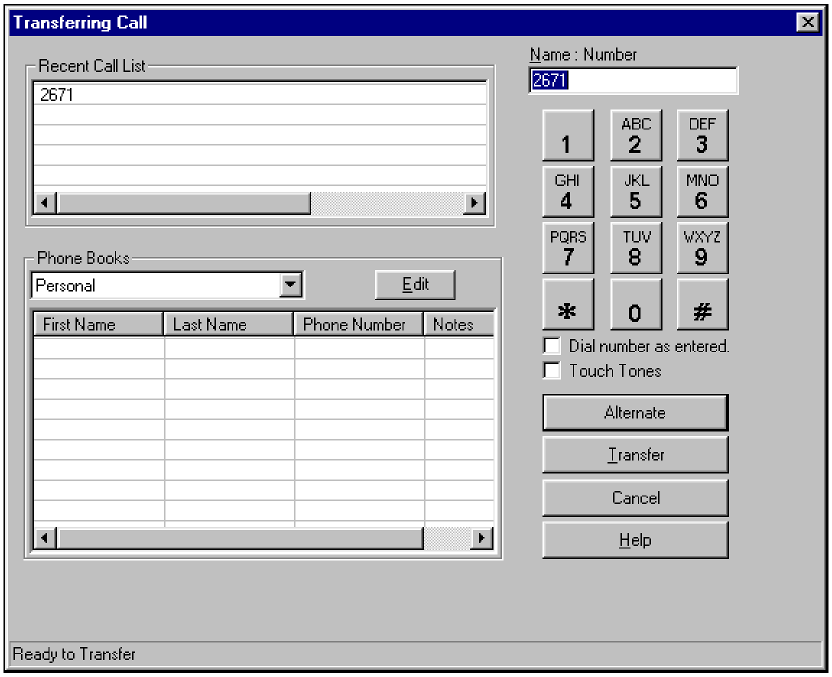
The Alternate function enables you to talk to Party A and Party B separately before completing the transfer of Party A to Party B.

▶ **To alternate between calls before transferring:**

1. While on a call, click **Transfer**.

   The Transferring Call window appears. (See Figure 8.)

Figure 8. The Transferring Call window.



2. Enter the phone number to which you are transferring the call in the **Name: Number** field, and then click **Dial.**

   When the phone rings, the Dial button changes to the Transfer button. Wait for Party B to answer the phone.

3. Click **Alternate** to speak to Party A, and then click **Alternate** again to speak to Party B.

   Continue clicking Alternate to switch between Party A and Party B. When you speak to one party, the other party is put on hold.

4. Click **Transfer.**

   Party A is transferred to Party B and you are disconnected from the call.

Alternating Before Adding a Call to a Conference

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

▶ To alternate between a conference call and another party:

1. While on a call, click **Conference.**

   The **Conferencing** window appears and the active call is put on hold.

2. Enter the phone number of the person you want to add to the conference call in the **Name: Number** field, and then click **Dial**.

   When the phone rings, the Dial button changes to the Add to Conf. button. Wait for Party B to answer the phone.

3. After Party B answers, click **Alternate** to speak to the conference, and then click **Alternate** again to speak to Party B.

   Continue clicking Alternate to switch between the conference and Party B. When you speak to one party, the other party is on hold.

4. Click **Add to Conf.**

   Party B is added to the conference call.

Call/Chat

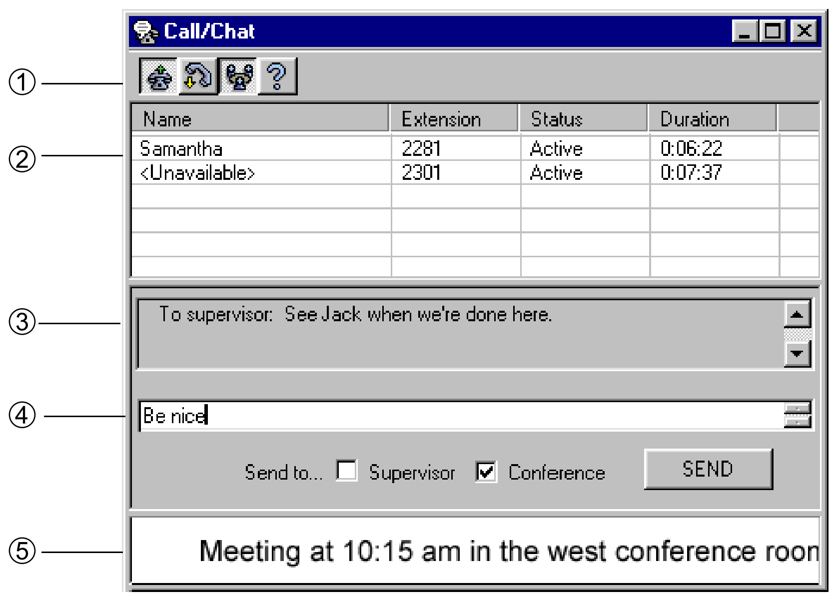
Call/Chat is an application that allows you to:

- Use a chat window to exchange messages with your supervisor and conference call participants
- Receive messages from your supervisor, including attention-getting scrolling marquee messages

Call/Chat is active when Agent Desktop is active. It cannot be started independently.

The Call/Chat Window

Figure 9. The Call/Chat window



Key:
1 . . . . . Call control buttons
2 . . . . . Conference callers (<Unavailable> displayed if call information is unknown)
3 . . . . . Chat log pane
4 . . . . . Text pane
5 . . . . . Scrolling marquee message pane

Window Behavior

By default, the Call/Chat window appears when a conference call is present and minimizes when the conference call ends. This mode is the Normal mode.

You can change this window behavior for the current session with the View menu.

> **NOTE:** This menu is active only if the system administrator has enabled local administration.

> **NOTE:** If you manually display the Call/Chat window, it will remain open on your desktop, no matter which behavior mode has been chosen for it.

▶ To change window behavior:

- From the **View** menu, choose the behavior mode you want to use in the current session. For definitions of the various window behavior modes, refer to the table on page 7.

Call Control Buttons

Call control buttons govern your participation in conference calls.

Button	Name	Description
	Drop	Drops you out of the conference call.
	Hold/Unhold	Puts you on or takes you off hold.
	Conference	Adds other parties into the conference call. Only the agent who initiated the conference can add parties to the conference.

Conference Callers

This pane of the Call/Chat window lists information about the participants in the conference call.

> **NOTE:** If call information is unknown, the field displays <Unavailable>.

Field	Description
Name	Name of the conference participant, if available.
Extension	The conference participant's phone extension, if available.
Status	Participant's call status (active or on hold).
Duration	The length of time the participant has spent on the call.

Chat Log

The chat log is a record of any chatting done between conference call participants. It can hold up to 50 message. Once that limit is reached the earliest 15 messages are dropped off as the most recent is added. The chat log is viewable only during the current session and is not saved.

Text Pane

Type messages to your supervisor or other conference call participants in the text pane. There is no limit to the amount you can type; the window scrolls down when you exceed the width of the field.

Scrolling Marquee Message Pane

Your supervisor can send important announcements to all Agent Desktop users on his or her team using the scrolling marquee message function. These messages appear for a preset length of time.

If you have set Call/Chat in Normal or Stealth mode, receiving a marquee message will cause the window to maximize so you can see the message.

Using Call/Chat

You can send a message to your supervisor at any time and to other agents when they are conference call participants.

> **NOTE:** Chat messages can be sent only to agents within your Logical Contact Center. If you are on a conference call with agents outside your Logical Contact Center, the Conference “Send to:” check box is not displayed in the Call/Chat window.
>
> If you are on a conference call with agents both within and outside your Logical Contact Center, the Conference “Send to:” check box is displayed, but only the agents within your Logical Contact Center will receive any chat message you send.

▶ **To send a message:**

1. Type your message in the text pane.
2. Check the message recipient– **Supervisor, Conference**, or both.
3. Click **Send**.

The text you typed appears in the Chat log pane.

> **NOTE:** You can select text in the chat log pane and copy it to the clipboard to paste into another application.

Viewing Logs and Statistics

Call logs and agent logs are viewed in their respective viewers. You can access logs from the main window by choosing **File > View Logs > Call Logs** or **File > View Logs > Agent State Logs**.

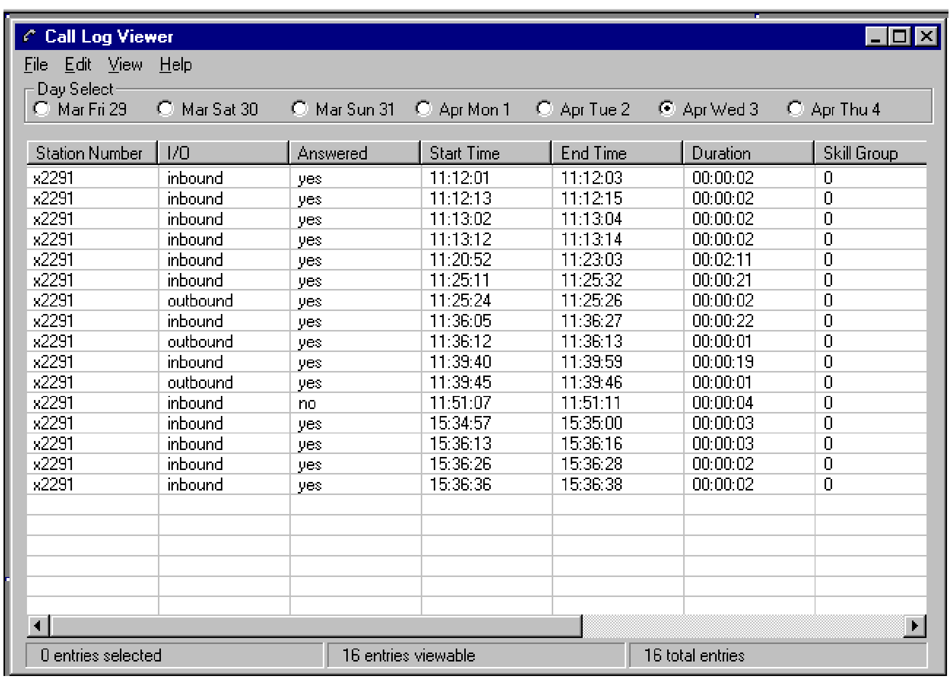
You can view statistics pertaining to the agent and to the skill group by choosing **File > View Logs > ACD Statistics**.

Call Log Viewer

The call log viewer (Figure 10) displays a record of the calls made and received by an agent for the last seven days. You can choose the data you view in the log and set filters to control under what circumstances that information is shown.

If no information is available for one of the past seven days, <N/A> is displayed in each column of the log.

Figure 10. The Call Log Viewer window.



The information displayed for each call is:

Field	Description
Station Number	The agent's phone extension
I/O	Inbound or outbound call
Answered	(Yes/No) Answered or unanswered call
Start Time	Start time of the call
End Time	End time of the call
Duration	Length of the call
Skill Group	Skill group queue through which the call was routed
Calling Number	Originating phone number
Called Number	Recipient phone number
Calling Info	Not active
Called Info	Not active

Sorting Log Entries

You can sort log entries by any of the columns in the log in ascending/descending order by clicking on the column header.

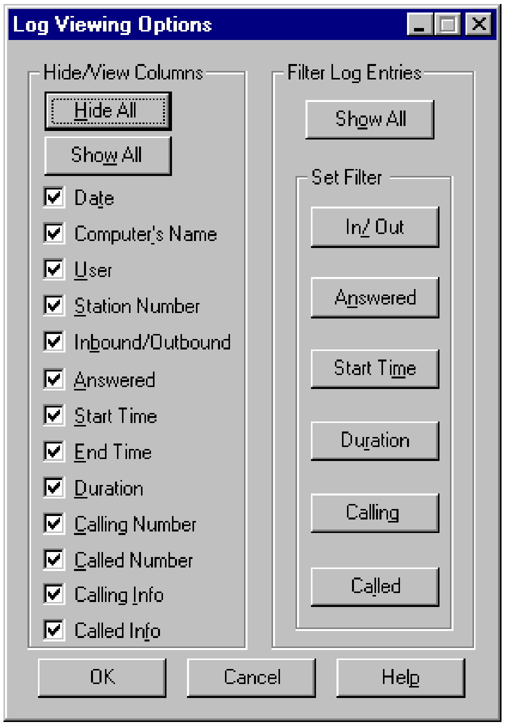
Setting Log Viewing Options

The Log Viewing Options window (Figure 11) enables you to control how your log viewer window appears.

▶ **To hide/view columns:**

- Click **Hide All** to prevent any columns from displaying.
- Click **Show All** to display all available columns.
- Check or uncheck the individual columns to selectively display data.

Figure 11. The Log Viewing Options window



Setting Log Filters

Use the Log Viewing Options window to set log filters.

▶ **To filter log entries:**

Take either of the following actions:

- Click **Show All** to display all log entries without filtering them.
- Click the appropriate button to filter call information:
  - **In/Out**. The Inbound/Outbound filter displays the log entries of inbound and/or outbound calls. You can set it to show either or both types of calls.
  - **Answered**. The Answered/Unanswered filter displays log entries of answered and/or unanswered calls. You can set it to show either or both types of calls.
  - **Start Time**. The Set Start Time filter displays or hides log entries of phone calls that are time-stamped before a time you set. Use a 24-hour clock to express the time.
  - **Duration**. The Set Duration filter displays or hides log entries that exceed a time duration you set.

- **Calling**. The Set Calling Number filter displays or hides log entries of calls made from phones containing a string of numbers you enter in the field. The number string can appear anywhere within the phone number.
- **Called**. The Set Called Number filter displays or hides log entries of calls made to phones containing a string of numbers you enter in the field. The number string can appear anywhere within the phone number.

Copying Log Entries

You can copy log entries and paste them into other applications as comma-delimited text.

▶ **To copy log entries:**

1. Select a log entry. To copy all entries in the log, choose **Edit > Select All**.
2. Choose **Edit > Copy**.
3. Open another application (for instance, a word processor or a spreadsheet) and paste the information into it.

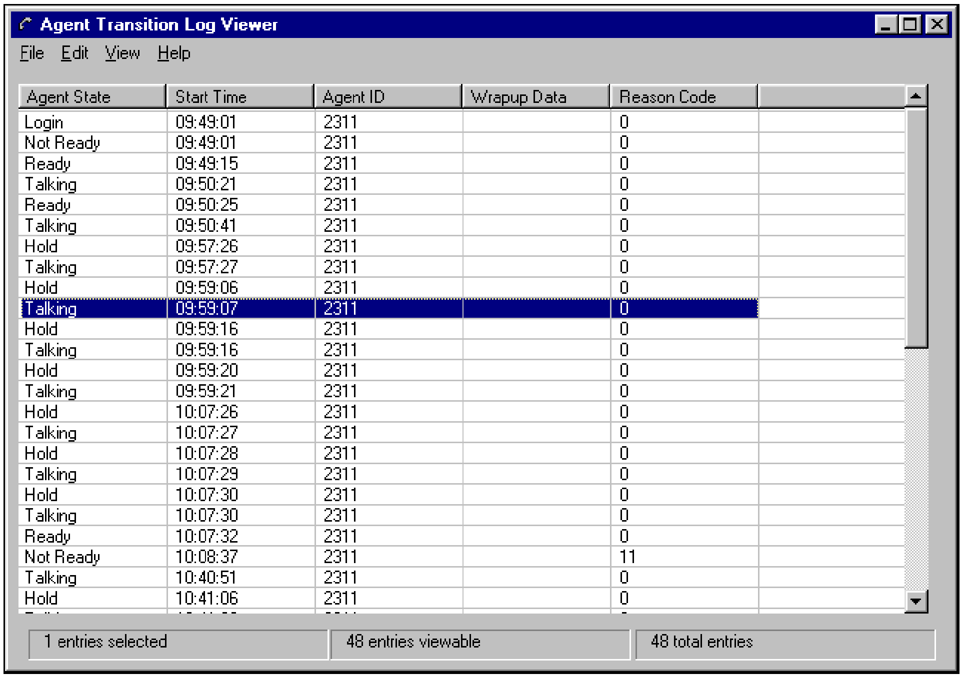
Agent State Logs

The Agent Transition Log Viewer (Figure 12) displays a record of all ACD server state transitions for the current day. The log is in chronological order, and includes:

Field	Description
Agent State	Agent state that you have entered.
Start Time	Time of the agent state transition.
Agent ID	Your agent ID.
Wrapup Data	Any wrapup data you entered, if the agent state you transition to is Work Ready or Work Not Ready.
Reason Code	Any reason code you entered, if you log out or the agent state you enter is Not Ready.

NOTE: The Agent Transition Log is always one state behind the current state, because it calculates the amount of time spent in each state. The current state is displayed on the Agent Desktop status bar.

Figure 12. The Agent Transition Log window.



Agent State	Start Time	Agent ID	Wrapup Data	Reason Code
Login	09:49:01	2311		0
Not Ready	09:49:01	2311		0
Ready	09:49:15	2311		0
Talking	09:50:21	2311		0
Ready	09:50:25	2311		0
Talking	09:50:41	2311		0
Hold	09:57:26	2311		0
Talking	09:57:27	2311		0
Hold	09:59:06	2311		0
Talking	09:59:07	2311		0
Hold	09:59:16	2311		0
Talking	09:59:16	2311		0
Hold	09:59:20	2311		0
Talking	09:59:21	2311		0
Hold	10:07:26	2311		0
Talking	10:07:27	2311		0
Hold	10:07:28	2311		0
Talking	10:07:29	2311		0
Hold	10:07:30	2311		0
Talking	10:07:30	2311		0
Ready	10:07:32	2311		0
Not Ready	10:08:37	2311		11
Talking	10:40:51	2311		0
Hold	10:41:06	2311		0

▶ **To view a log:**

- Choose **File > View > Agent State Logs**.

  NOTE: You may see two Ready or Not Ready transitions in a row in the log viewer. This sequence occurs when you change to the Reserved state in between the two Ready or Not Ready states. The Reserved state is not displayed in the transition log viewer so two consecutive states appear.

Copying Log Entries

You can copy log entries and paste them into other applications as comma-delimited text. See "Copying Log Entries" on page 35.

ACD Statistics

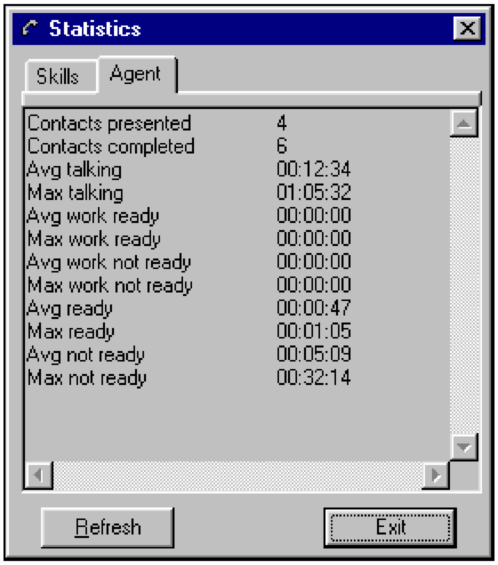
Agent Desktop enables you to view real-time ACD statistics pertaining to the calls you handle and the calls that enter the queue.

To view the most recent agent statistics, click Refresh. Skills statistics are automatically refreshed every five seconds.

Agent Statistics

The Agent tab (Figure 13) displays the following statistics. All statistics are for the current day starting at midnight.

Figure 13. The Statistics window, Agent tab.



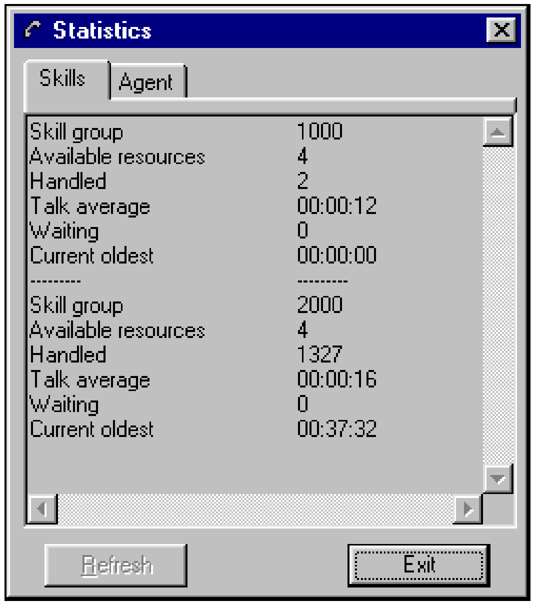
Statistic	Description
Contacts presented	Number of inbound calls (routed and non-routed) received on the monitored extension of the phone device
Contacts completed	Number of calls (inbound, outbound, routed, and non-routed) answered or made by the agent on the monitored extension of the phone device
Avg talking	Average talk time and average hold time, in seconds, of all contacts handled
Max talking	Longest talk time, in seconds, of all contacts handled
Ave work ready	Average time, in seconds, spent in the Work Ready state
Max work ready	Single longest time, in seconds, spent in the Work Ready state
Ave work not ready	Average time, in seconds, spent in the Work Not Ready state
Max work not ready	Single longest time, in seconds, spent in the Work Not Ready state

Statistic	Description
Avg ready	Average time, in seconds, spent in the Ready state
Max ready	Single longest time, in seconds, spent in the Ready state
Avg not ready	Average time, in seconds, spent in the Not Ready state
Max not ready	Single longest time, in seconds, spent in the Not Ready state

Skills Statistics

The Skills tab displays the following statistics. Skills statistics are refreshed automatically every five seconds.

Figure 14. Statistics window, Skills tab.



NOTE: You must have ICM 4.6.1 installed to receive the statistics Waiting and Available Resources. You must have ICM 4.6.1 build 8596 or later installed to receive the statistic Current Oldest.

Statistic	Description
Skill group	Skill group's ID number
Available resources	Number of agents currently logged on to the skill group
Handled	Number of inbound ACD calls handled by agents in the skill group
Talk average	Average talk time, in seconds, for inbound ACD calls counted as handled by agents in the skill group
Waiting	Number of calls currently queued to the skill group
Current oldest	Duration of the oldest call in the queue

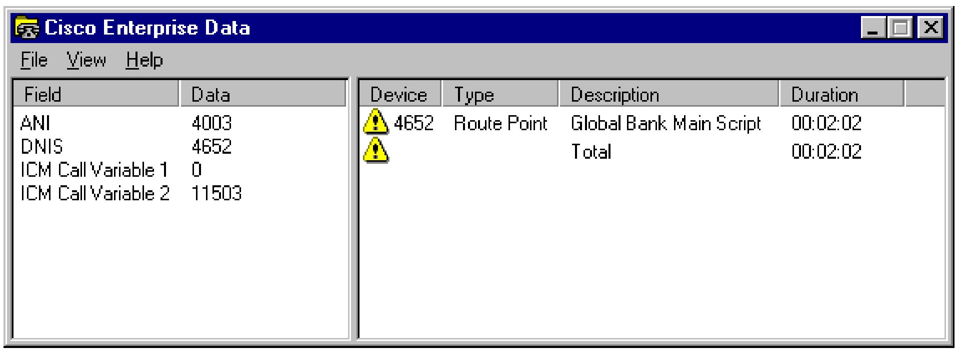
Enterprise Data

The Enterprise server tracks a call as it connects to devices and maintains a list of call information. If your installation includes the Enterprise server, and the Enterprise Data function is installed on your PC, then this data displays as part of the call information.

Enterprise data and call activity are displayed in the Enterprise Data window (Figure 15).

The Enterprise Data Window

Figure 15. The Enterprise Data window.



The Enterprise Data window has two panes:

- The enterprise data view in the left pane, which shows data associated with the call
- The call activity view in the right pane, which shows a list of devices that detail the points the call has touched before reaching the agent

You can display either or both of the views in the Enterprise Data window.

▶ **To change the Enterprise Data view:**

- From the **View** menu, choose **Enterprise Data** or **Call Activity**, or both. The Enterprise Data window appears with one or two panes, depending on your choices.

Enterprise Data View

This pane displays enterprise data associated with the selected call.

If you are set up by the administrator to be able to edit data fields, you may modify any of the data fields.

▶ **To modify a data field:**

1. Double-click the field to view the **Edit Enterprise Data** window.
2. Modify the data.
3. Click **OK**.

Call Activity View

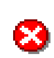
The call activity view displays the call activity for the selected call:

- The Device column displays the list of devices a call passes through.
- The Duration column displays the amount of time the call spent on that device. If the call is still on the device, the duration increments in real time.
- The Total is the sum of all the durations listed in the window.

NOTE: In some cases, a call may be on multiple devices simultaneously—for example, if a call is placed in multiple queues or is conferenced to multiple extensions. The call activity window displays the duration of the call on each individual device. No attempt is made to indicate overlapping times. In this case the total duration is the sum of the time spent on these overlapping devices, and is greater than the actual amount of time the call spends in the contact center.

A *threshold* is the acceptable amount of time a call can remain at a particular device or contact center. The system administrator may assign caution and warning threshold values to each device type, as well as a total threshold value for a call. If a call remains at a device longer than the defined caution and warning thresholds, a caution or warning icon is displayed in the call activity view next to the device. These icons are:

 **Caution**

 **Warning**

Window Behavior

By default, the Enterprise Data window appears when a call is present and minimizes when Agent Desktop is idle. This mode is the Normal mode.

You can change this window behavior for the current session with the View menu.

> **NOTE:** This menu is active only if the system administrator has enabled local administration.

▶ **To change window behavior:**

- From the **View** menu, choose the behavior mode you want to use in the current session. For definitions of the various window behavior modes, refer to the table on page 7.

Server Autorecovery

The server autorecovery feature enables Agent Desktop to automatically recover its connection to the Cisco Desktop Product Suite servers in the event of a server restart or a network outage.

When Agent Desktop detects that it is unable to communicate with a server (generally within three minutes of the server failure), it displays a popup message notifying you that a particular server is down and that it is attempting to recover. All the Agent Desktop features related to that server are disabled.

> **NOTE:** These popup messages are advisory messages only. No action on your part is required. Click **OK** to close the message.

When Agent Desktop detects that the server is again available (usually within one minute of server recovery), it displays a message notifying you that the server has recovered. The Agent Desktop features related to that server are re-enabled.