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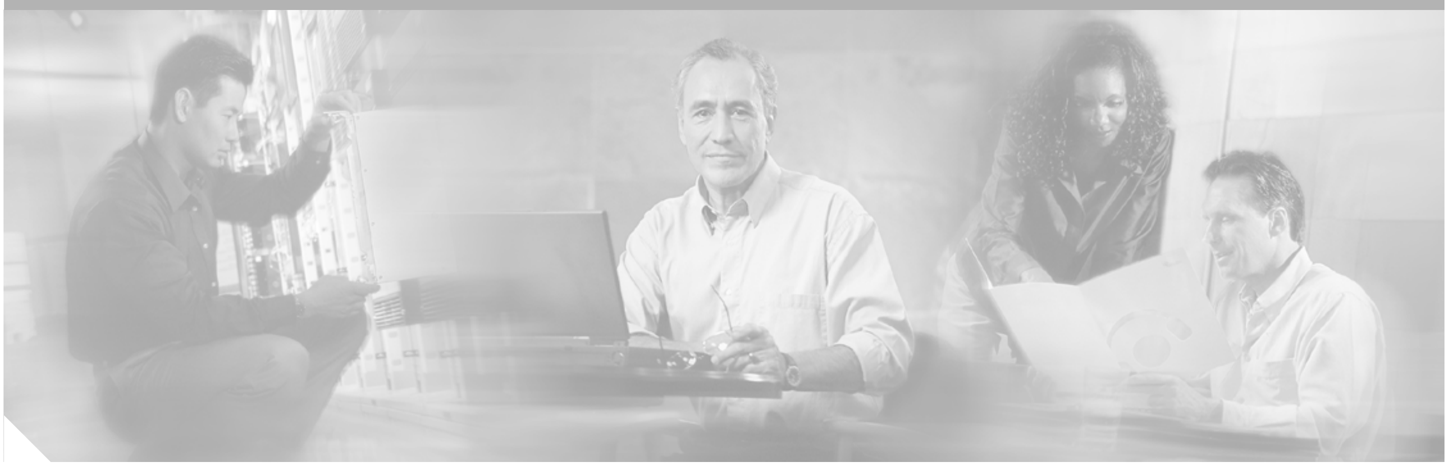

# Cisco Agent Desktop User's Guide

IP Contact Center Enterprise Edition 6.0
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# Cisco Agent Desktop User's Guide

## Introduction

Cisco Agent Desktop is the portion of Cisco that resides on the contact center agent's computer.

### Features

- The built-in soft phone allows you to handle customer phone calls without using a hard phone. The Agent Desktop soft phone features a phone directory that allows 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 agent call log tracks the calls you made and received for the last seven days.
- The Chat feature allows you to communicate with your supervisors and other agents via text messages 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.
- The integrated browser allows you to view intranet and internet webpages from within Agent Desktop.

## Obtaining Documentation

Cisco provides several ways to obtain documentation, technical assistance, and other technical resources. These sections explain how to obtain the most current technical information from Cisco Systems.

### Cisco.com

You can access the most current Cisco documentation on the World Wide Web at this URL:

www.cisco.com/univercd/home/home.htm

You can access the Cisco website at this URL:

www.cisco.com

International Cisco websites can be accessed from this URL:

www.cisco.com/public/countries_languages.shtml

### Documentation CD-ROM

Cisco documentation and additional literature are available in a Cisco Documentation CD-ROM package, which may have shipped with your product. The Documentation CD-ROM is updated regularly and may be more current than printed documentation. The CD-ROM package is available as a single unit or through an annual or quarterly subscription.

Registered Cisco.com users can order a single Documentation CD-ROM (product number DOC-CONDOCCD=) through the Cisco Ordering tool:

www.cisco.com/en/US/partner/ordering/ordering_place_order_ordering_tool_launch.html

All users can order annual or quarterly subscriptions through the online Subscription Store:

www.cisco.com/go/subscription

### Ordering Documentation

You can find instructions for ordering documentation at this URL:

www.cisco.com/univercd/cc/td/doc/es_inpck/pdi.htm

You can order Cisco documentation in these ways:

- Registered Cisco.com users (Cisco direct customers) can order Cisco product documentation from the Networking Products MarketPlace:

  www.cisco.com/en/US/partner/ordering/index.shtml

- Nonregistered Cisco.com users can order documentation through a local account representative by calling Cisco Systems Corporate Headquarters (California, USA) at 408 526-7208 or, elsewhere in North America, by calling 800 553-NETS (6387).

### Documentation Feedback

You can submit comments electronically on Cisco.com. On the Cisco Documentation home page, click Feedback at the top of the page.

You can send your comments in e-mail to bug-doc@cisco.com.

You can submit comments by using the response card (if present) behind the front cover of your document or by writing to the following address:

Cisco Systems
Attn: Customer Document Ordering
170 West Tasman Drive
San Jose, CA 95134-9883

We appreciate your comments.

## Obtaining Technical Assistance

For all customers, partners, resellers, and distributors who hold valid Cisco service contracts, the Cisco Technical Assistance Center (TAC) provides 24-hour, award-winning technical support services, online and over the phone. Cisco.com features the Cisco TAC website as an online starting point for technical assistance.

### Cisco TAC Website

The Cisco TAC website (www.cisco.com/tac) provides online documents and tools for troubleshooting and resolving technical issues with Cisco products and technologies. The Cisco TAC website is available 24 hours a day, 365 days a year.

Accessing all the tools on the Cisco TAC website requires a Cisco.com user ID and password. If you have a valid service contract but do not have a login ID or password, register at this URL:

http://tools.cisco.com/RPF/register/register.do

### Opening a TAC Case

The online TAC Case Open Tool (www.cisco.com/tac/caseopen) is the fastest way to open P3 and P4 cases. (Your network is minimally impaired or you require product information). After you describe your situation, the TAC Case Open Tool automatically recommends resources for an immediate solution. If your issue is not resolved using these recommendations, your case will be assigned to a Cisco TAC engineer.

For P1 or P2 cases (your production network is down or severely degraded) or if you do not have Internet access, contact Cisco TAC by telephone. Cisco TAC engineers are assigned immediately to P1 and P2 cases to help keep your business operations running smoothly.

To open a case by telephone, use one of the following numbers:

Asia-Pacific: +61 2 8446 7411 (Australia: 1 800 805 227)
EMEA: +32 2 704 55 55
USA: 1 800 553-2447

For a complete listing of Cisco TAC contacts, go to this URL:

www.cisco.com/warp/public/687/Directory/DirTAC.shtml

### TAC Case Priority Definitions

To ensure that all cases are reported in a standard format, Cisco has established case priority definitions.

- Priority 1 (P1)—Your network is "down" or there is a critical impact to your business operations. You and Cisco will commit all necessary resources around the clock to resolve the situation.
- Priority 2 (P2)—Operation of an existing network is severely degraded, or significant aspects of your business operation are negatively affected by inadequate performance of Cisco products. You and Cisco will commit full-time resources during normal business hours to resolve the situation.
- Priority 3 (P3)—Operational performance of your network is impaired, but most business operations remain functional. You and Cisco will commit resources during normal business hours to restore service to satisfactory levels.
- Priority 4 (P4)—You require information or assistance with Cisco product capabilities, installation, or configuration. There is little or no effect on your business operations.

## Obtaining Additional Publications and Information

Information about Cisco products, technologies, and network solutions is available from various online and printed sources.

- The Cisco Product Catalog describes the networking products offered by Cisco Systems, as well as ordering and customer support services. Access the Cisco Product Catalog at this URL:

  www.cisco.com/en/US/products/products_catalog_links_launch.html

- Cisco Press publishes a wide range of networking publications. Cisco suggests these titles for new and experienced users: Internetworking Terms and Acronyms Dictionary, Internetworking Technology Handbook, Internetworking Troubleshooting Guide, and the Internetworking Design Guide. For current Cisco Press titles and other information, go to Cisco Press online at this URL:

  www.ciscopress.com

- Packet magazine is the Cisco quarterly publication that provides the latest networking trends, technology breakthroughs, and Cisco products and solutions to help industry professionals get the most from their networking investment. Included are networking deployment and troubleshooting tips, configuration examples, customer case studies, tutorials and training, certification information, and links to numerous in-depth online resources. You can access Packet magazine at this URL:

  www.cisco.com/go/packet

- iQ Magazine is the Cisco bimonthly publication that delivers the latest information about Internet business strategies for executives. You can access iQ Magazine at this URL:

  www.cisco.com/go/iqmagazine

- Internet Protocol Journal is a quarterly journal published by Cisco Systems for engineering professionals involved in designing, developing, and operating public and private internets and intranets. You can access the Internet Protocol Journal at this URL:

  www.cisco.com/en/US/about/ac123/ac147/about_cisco_the_internet_protocol_journal.html

- Training–Cisco offers world-class networking training. Current offerings in network training are listed at this URL:

  www.cisco.com/en/US/learning/index.html

# 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**.

## Agent Desktop Versions

There are three versions of Cisco Agent Desktop: 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 |
|---|---|---|---|
| Task buttons | | ● | ● |
| Event-triggered work flows | | ● | ● |
| Enterprise data thresholds | | ● | ● |
| Wrapup data | ● | ● | ● |
| Integrated browser | | | ● |
| Agent-initiated chat | ● | ● | ● |
| Automated recording (part of a work flow) | | ● | ● |
| Cisco Outbound Option | | ● | ● |
| Media termination | ● | ● | ● |

### Media Termination

If your version of Agent Desktop includes Media Termination, Agent Desktop acts as your IP phone. Agent Desktop. If your version does not include Media Termination, you must have an IP phone to function.

# Starting Agent Desktop

▶ **To start Agent Desktop:**

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

   The Agent Login dialog box appears. (See **Figure 1**.)

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

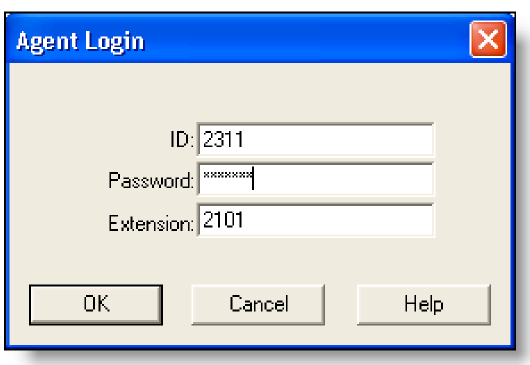
   **NOTE:** Agent Desktop remembers your ID the first time you log in. It is automatically entered into the ID field the next time you log in. If you share a computer with another agent, check the ID field to make sure it contains your ID and not someone else's.

   If you attempt to log in and the 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 ID will be logged out.

   Agent Desktop starts and is immediately minimized on the taskbar at the bottom of your Windows desktop.

   **NOTE:** Applies to Supervisor Desktop users: While Agent Desktop and Supervisor Desktop IDs are the same, your passwords may differ. Consult your system administrator if you have problems logging into either application.

**Figure 1. Agent Login dialog box**



## Access Through a Virtual Private Network

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

It has been verified that Cisco VPN 3000 Concentrator and Cisco VPN Client work properly with CAD 6.0, and are supported for access. VPN solutions from other vendors may work correctly, but since they have not been formally verified, they are not supported. If you want an alternative solution to be verified, please contact your CAD distributor.

# Automated Updates

CAD 6.0 allows your system administrator to update all instances of Agent Desktop automatically to a new version.

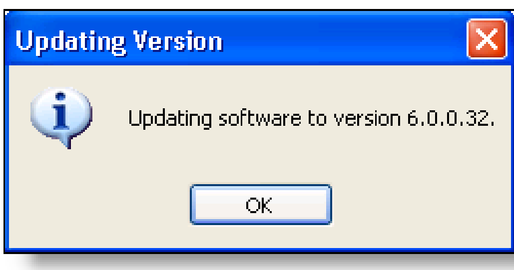
Every time you start Agent Desktop, it checks to see if there is an updated version available. If there is, it automatically runs the update process.

> **NOTE:** You must have administrator privileges on your PC in order for the update to proceed, because it involves changes to the machine registry. If you do not have administrator privileges, the update will fail.

> **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.

When this happens, you will see a dialog box notifying you that your copy of Agent Desktop will be updated. (See Figure 2.)

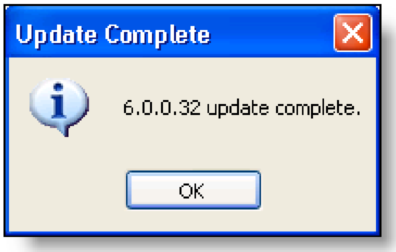
**Figure 2. Update notification dialog box**




Click **OK** and then follow the instructions in the series of dialog boxes that follows.

When the update is finished, you will see a final dialog box telling you that your update is complete. (See Figure 3.) When you click OK, Agent Desktop starts and you are able to log in as usual.

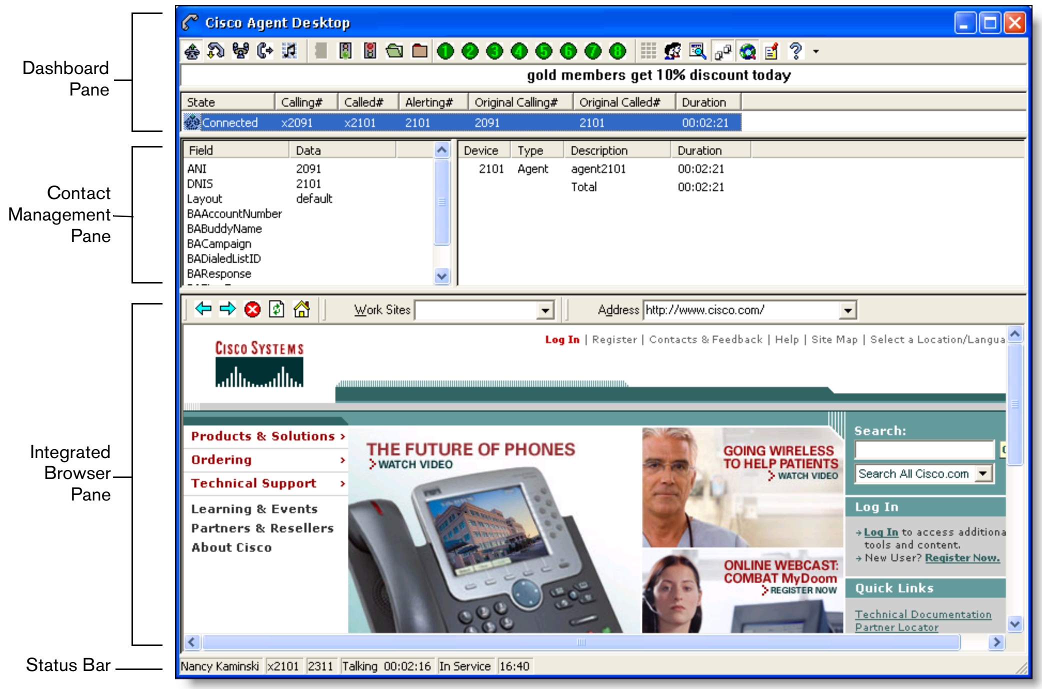
Figure 3. Update Complete dialog box



# The Agent Desktop Interface

The Agent Desktop interface displays information about active calls and allows you to perform phone functions. It also allows you to view web pages in its integrated browser pane, view agent and call statistic reports, and “chat” with other agents and supervisors using the Chat instant messaging feature.

**Figure 4. Agent Desktop interface**




## Accessibility

Agent Desktop has a number of features which aid accessibility by low-vision and vision-impaired users:

- Follows Windows settings for screen resolution and color/contrast settings
- Screen reader-compatible tool tips for all controls
- Screen reader-compatible shortcut keys for navigating the application and toolbar
- Audible tones that sound when a nonagent-initiated dialog appears (for example, new chat windows and notices to the agent that a supervisor is barging in, intercepting, and recording)

## Interface Shortcut Keys

Shortcut keys are available to navigate the Agent Desktop interface. The shortcut keys are:

**Table 1. Accessibility shortcut keys**

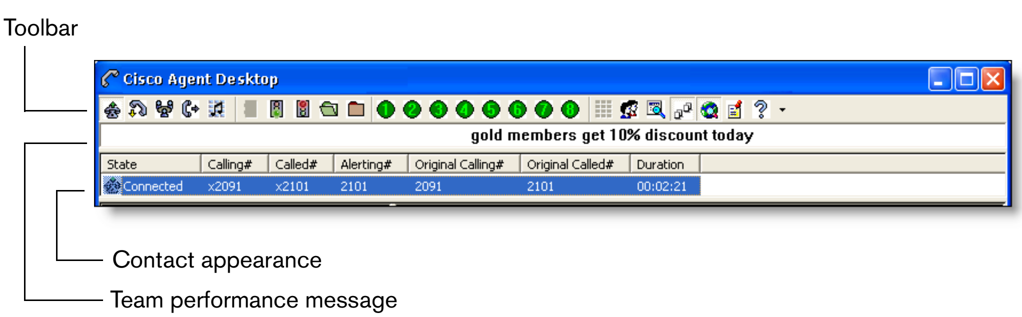
| Shortcut Keys | Description |
|---|---|
| Ctrl-S | Selects the call appearance. |
| Ctrl-E | Selects the first entry in the Enterprise Data pane. Press Enter to open the Edit Enterprise Data dialog box for the selected entry. |
| Alt-P | In the Dial Pad window, selects the first entry in the Employee Phone Book. |
| Alt-E | In the Agent Reports window, selects the Reports drop-down list. |
| Alt-Y | In the Agent Reports window, with the Agent Call Log displayed, selects the Dates drop-down list. |
| Alt-S | In the Agent Reports window, selects the first cell in the grid control. |

## Dashboard Pane

The dashboard pane provides overall control for Agent Desktop. It consists of three parts:

- the dashboard toolbar;
- the team performance message; and
- the contact appearance.

**Figure 5. Dashboard pane**



## Dashboard Toolbar

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

Buttons on the toolbar are grayed out if they control a function that is unavailable in your current situation. For example, if you have placed a call on hold, all other call control buttons are grayed out. When you take the call off hold, the other call control buttons are active again.

> **NOTE:** If your contact center is using Enhanced Agent Desktop, your toolbar can be configured by your administrator, and may use different buttons than those listed below.

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

**Table 1. Dashboard toolbar buttons**

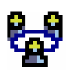
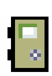
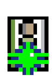
| Button | Name | Shortcut Key | Description |
|---|---|---|---|
|  | Answer/Drop | Ctrl-A | Answers or drops the selected call. |
|  | Hold/Unhold | Ctrl-H | Puts a selected call on hold or takes it off hold. |
|  | Conference | Ctrl-F | Puts the selected call on hold and adds other parties into a conference 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. |
|  | Login | Ctrl-L | Logs you into the ACD (alternates with Logout). |
|  | Logout | Ctrl-L | Logs you out of the ACD (alternates with Login). |
|  | Ready | Ctrl-W | Changes your state to Ready, indicating that you are available to receive ACD calls. |

**Table 1. Dashboard toolbar buttons (continued)**

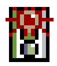
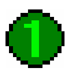
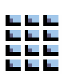
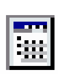
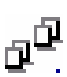
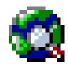
| Button | Name | Shortcut Key | Description |
|---|---|---|---|
|  | Not Ready | Ctrl-O | Changes your state to Not Ready, indicating that you are not available to receive ACD calls. |
|  | Work Ready | Ctrl-Y | Changes your state to Work Ready, indicating that you are in wrapup work after terminating 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. |
|  | Task Buttons | Alt-[button number] | Task buttons (Enhanced version only) are configured by your administrator to perform various functions, such as running a macro, launching an application, or sending a predefined chat message to your supervisor. There can be up to ten task buttons on the toolbar, and each button may be assigned more than one action. The buttons can be customized, so yours may be different. |
|  | Make Call | Ctrl-M | Displays the dial pad so you can dial an outgoing call. |
|  | Chat | Ctrl-J | Initiates a chat session with another member of your team, your supervisor, or a member of a conference call. |
|  | Reports | Ctrl-Q | Displays the Agent Reports window, where you can view your own call logs and statistics. |
|  | Show/Hide Contact Management | Ctrl-G | Shows or hides the contact management pane. |

**Table 1. Dashboard toolbar buttons (continued)**

| Button | Name | Shortcut Key | Description |
|---|---|---|---|
|  | Show/Hide Integrated Browser | Ctrl-B | Shows or hides the integrated browser pane. |
|  | Preferences | Ctrl-P | Displays the Preferences dialog box, where you can set the Agent window behavior. |
|  | Help/About | F1 | Accesses the online help and the About window. |

### Team Performance Message

The team performance message (TPM) is a scrolling message sent by a supervisor to the team for a selected length of time.

> **NOTE:** The TPM can also be non-scrolling if your supervisor chooses to send it that way.

When there is no message, the TPM section is not visible. As soon as your supervisor sends a TPM, the TPM section of the dashboard opens and the message scrolls across it.

### Contact Appearance

The contact appearance section displays data about the agent's current call appearances. There can be more than one call appearance in the section. For example, you may have one call on hold and one active call–both will be displayed.

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

The available fields are:

**Table 2. Contact Appearance fields**

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

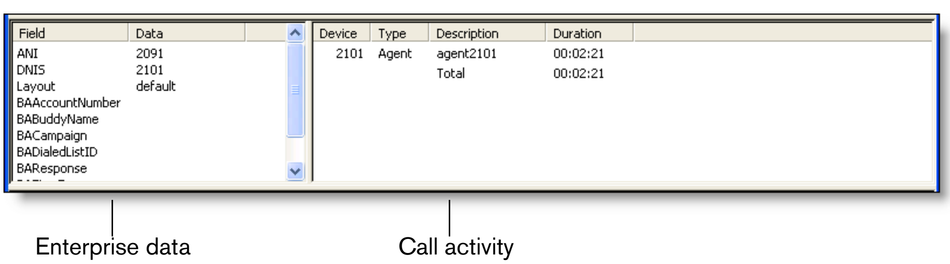
Some fields may display <unavailable> or be blank if the call information is unknown or does not exist.

Whenever the IP IVR is involved in a call, Agent Desktop displays the same information about the call in the contact appearance pane as the IP phone displays on its screen. Enterprise Data may display different data because it tracks the entire life of the call.

## Contact Management Pane

The contact management pane contains enterprise data (on the left) and call activity information (on the right).

**Figure 6. Contact Management pane**




You can click the Show/Hide Contact Management button on the dashboard toolbar to show or hide this pane of the Agent Desktop interface.

### Enterprise Data

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

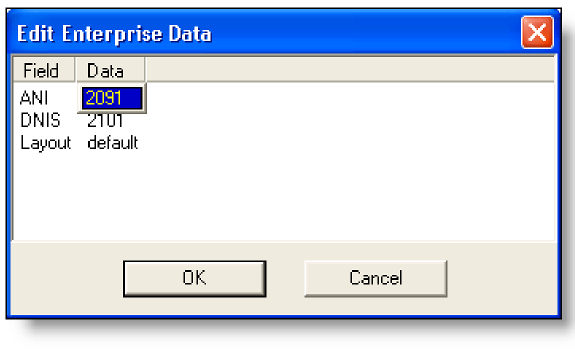
If you are set up by the administrator to be able to edit data fields, you may modify any of the data fields in the enterprise data window.

#### ▶ To modify a data field:

1. Double-click the field you wish to modify.

   The Edit Enterprise Data window appears. (See **Figure 7**.)

Figure 7. **Edit Enterprise Data window with ANI field selected for editing.**




2. Modify the data.
3. Click **OK**.

### Call Activity

The call activity section displays the call activity for the selected call.

Table 3. **Call Activity fields**

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

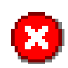
**NOTE:** In some cases, a call may be on multiple devices simultaneously. For example, if a call is placed in multiple queues or is conferenced to multiple extensions, the call activity section displays the duration of the call on each individual device. No attempt is made to indicate overlapping times. 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.

### Thresholds

A *threshold* is the acceptable amount of time a call can remain at a particular device or contact center. Your 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 pane next to the device. These icons are:


**Caution**


**Warning**

## Integrated Browser Pane

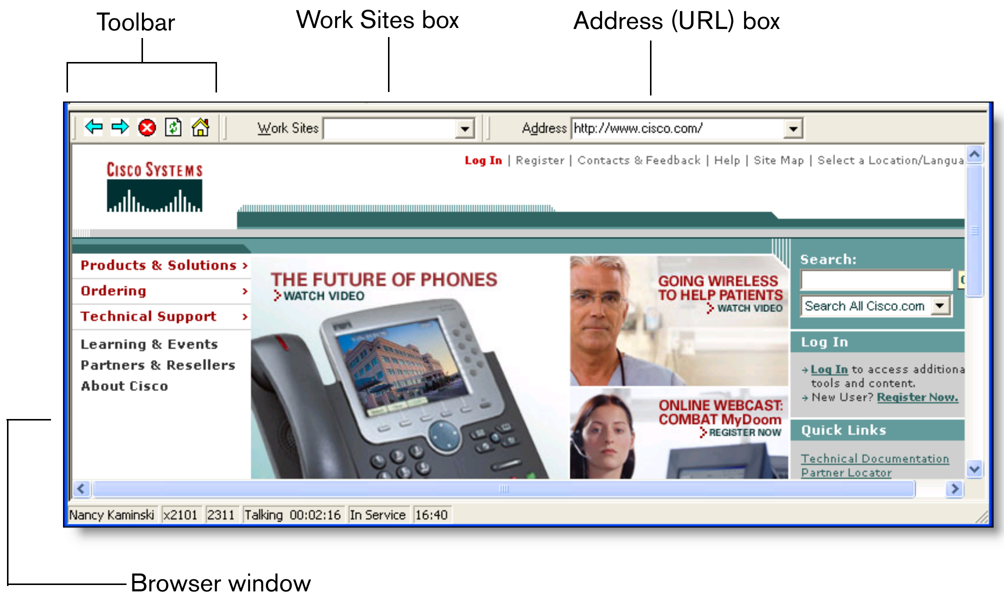
The integrated browser pane displays internet or intranet web pages to help you assist customers. The administrator can configure a specific website to display as your home page, and add a list of work sites (similar to web browser “favorites”) that allow you to navigate to frequently-used websites quickly.

The integrated browser pane includes:

- the integrated browser toolbar;
- the Work Sites box;
- the Address box; and
- the browser window.

See **"Using the Integrated Browser" on page 45** for information on this pane of the Agent Desktop interface.

**Figure 8. Integrated Browser pane**



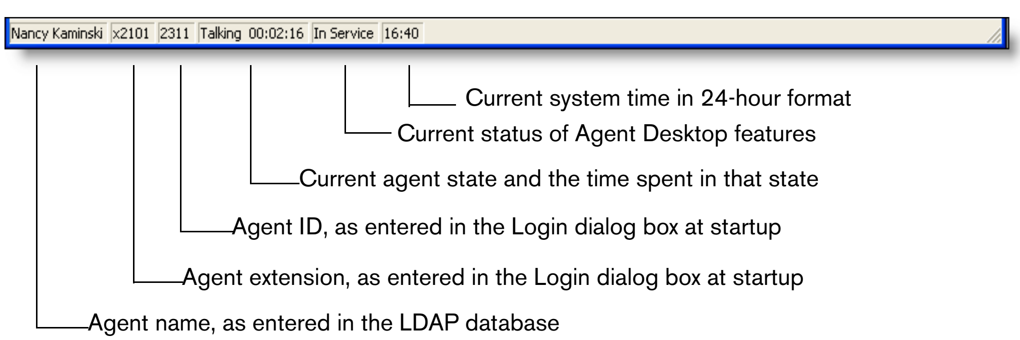

## Status Bar

The status bar displays current information about Agent Desktop. (See **Figure 9**.)

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

For more information on the Current Status popup window and service autorecovery, see **"Service Autorecovery" on page 49**.

**Figure 9. Status Bar**

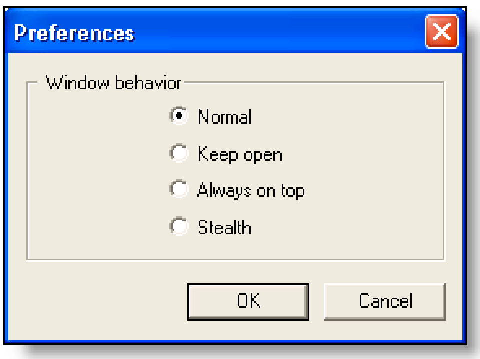


## Setting the Window Behavior Mode

By default, the Agent Desktop interface is minimized when idle and appears when calls are present (Normal mode). You can change this behavior mode using the Preferences dialog box. Access the Preferences dialog box by clicking the Preferences button on the toolbar.

**NOTE:** If the system administrator configures your toolbar so that the Preferences button is hidden, you will not be able to change the window behavior mode.

**Figure 10. Preferences dialog box**




The available modes are:

**Table 4. Window behavior modes**

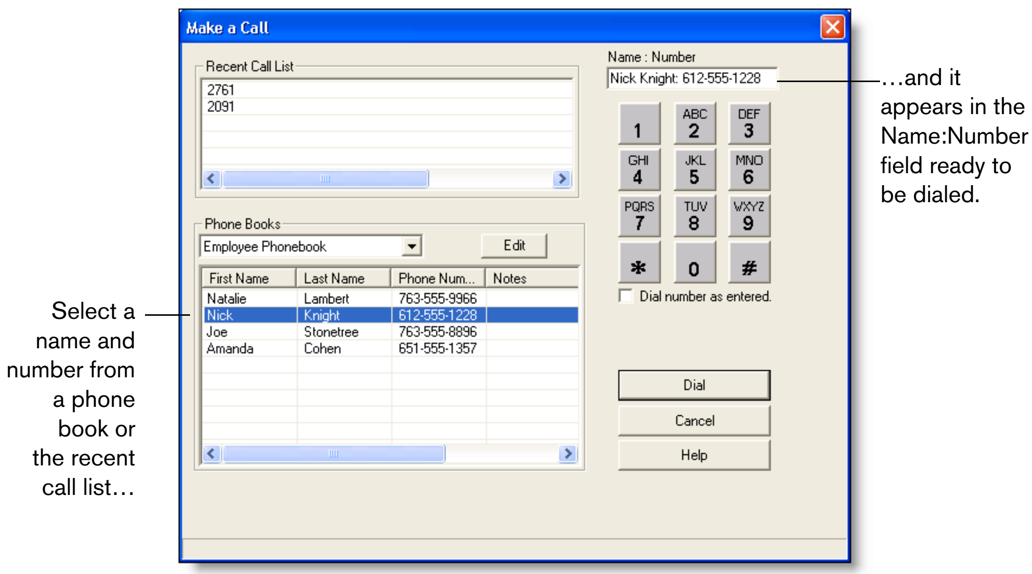
| Mode | Description |
|---|---|
| Normal | Default. The window appears when calls are present and minimizes when idle. |
| Keep open | The window remains open when idle. |
| Always on top | The window remains open when idle and on top of all other open applications. |
| Stealth | The window appears 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 or if you receive a team performance message. |

# The Dial Pad Window

The dial pad window 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 Call,** or **Conferencing**.

**Figure 11. Dial Pad window**




### Recent Call List

When you dial a phone number, it is automatically entered into the recent call list. 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 employee 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.

### Employee Phone Book

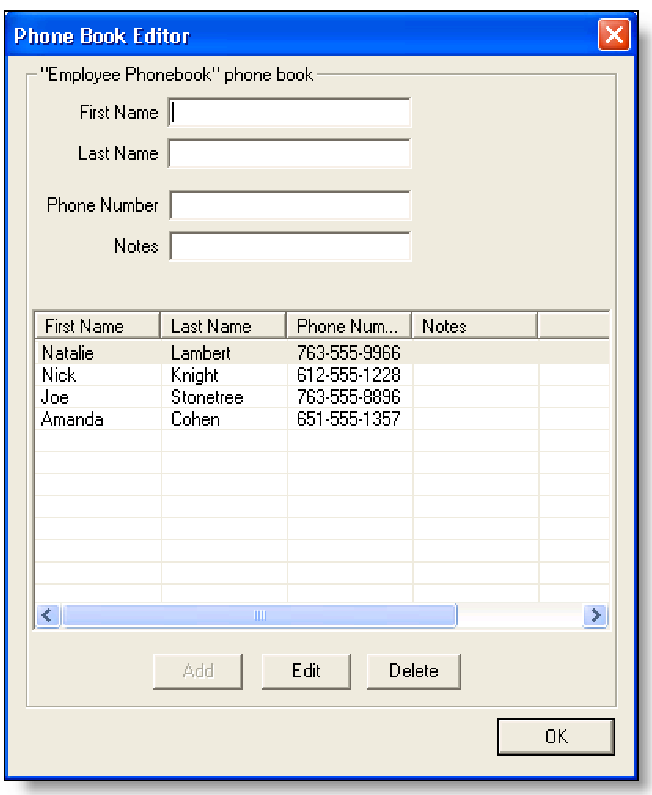
Your employee phone book is the only one you can edit. All others are controlled by the system administrator.

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

1. In the dial pad window, choose **Employee Phonebook** from the Phone Books drop-down list, and then click **Edit**.

   The Phone Book Editor window appears.

**Figure 12. Phone Book Editor 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**. (Only the Phone Number field is required.)

     The Phone Number field allows only the characters 0–9, aA–zZ, ‘ ( ) + ; / : . = ? and a 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.
   - 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. Entering a name is optional, but if one is entered, it must be followed by a colon and a space to separate it from the phone number:

**John Doe: 612-555-1212**

You 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 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.

# Handling Phone Calls

You can use the soft phone built into Agent Desktop or a hard phone to handle calls. Either type of call shows up in the dashboard pane.

The following sections assume you use the Agent Desktop interface to handle calls.

## Answering a Call

You can receive ACD and non-ACD calls through Agent Desktop. You must be logged in and be in the Ready state to receive an ACD call. You can be in any state to receive a non-ACD call.

▶ **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.

▶ **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**.

   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.

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 third party is ready to accept the call.
- **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 if the third party is ready to accept the call.

▶ **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.

There are two types of conference calls:

- **Supervised conference**. In a supervised conference, you speak to the third party you want to add to your call before completing the conference, in order to confirm that the third party is ready to accept the call.
- **Blind conference**. In a blind conference, you add the third party to the conference without speaking to him or her.

**NOTE:** If you use a blind conference to add someone to your call, you may or may not see the call tagged as a conference call in the dashboard pane.

▶ **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 allows you to switch between two parties before transferring a call or adding a call to a conference.

### Alternating Before Transferring a Call

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

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

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

   The Transferring Call window appears.

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

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

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

   You may 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.

   You can click Transfer to complete the transfer regardless of which party you are connected with.

### Alternating Before Adding a Call to a Conference

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

#### ▶ To alternate between a conference call and another party:

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

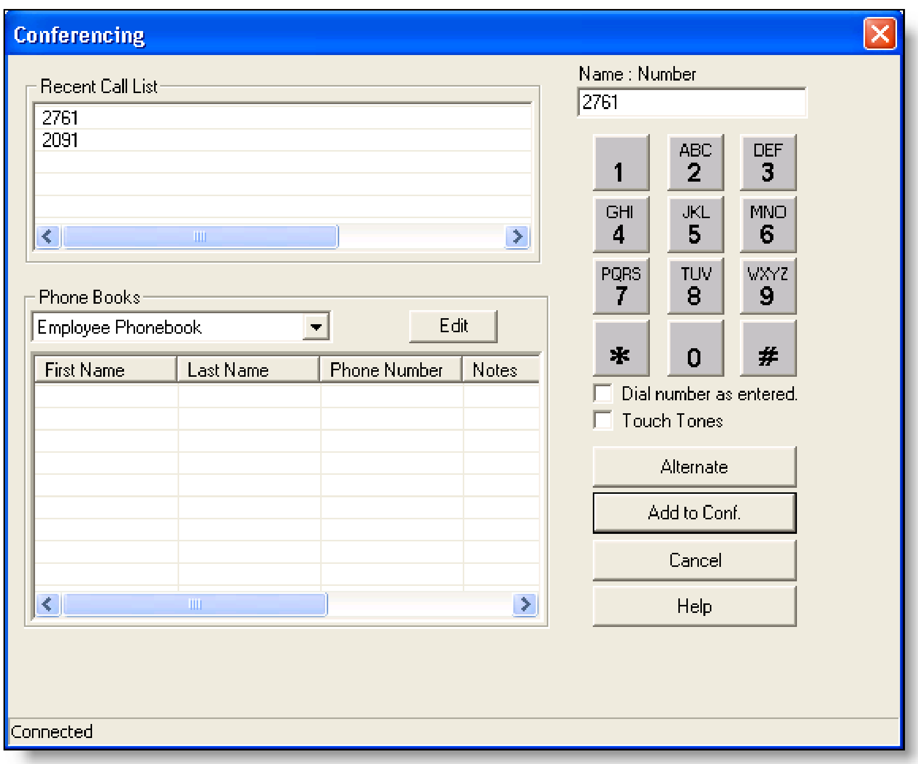
   The **Conferencing** window appears and the active call is put on hold.

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

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

Figure 13. Alternating in a conference call.



3. Click **Add to Conf.**

   Party B is added to the conference call.

## Supervisor Intervention

Your supervisor can intervene in calls you receive. He or she can:

- “Barge In” on a call–join your call with a customer in a forced conference
- “Intercept” a call–transfer a customer call to him or herself in a forced transfer
- Monitor your calls
- Record your calls

You may or may not be notified when your supervisor monitors or records your calls, depending on how the system is configured.

# Agent States

Agent Desktop allows you to change your agent state in the ACD through the use of the agent state buttons. Only the agent states that are valid choices from your current agent state will be available at any given time.

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

The agent state buttons indicate the state you clicked, not your current state. For instance, if you click the Work Not Ready state button while on a call, the Work Not Ready button appears to be pressed. Your current state is displayed on the status bar.

Available agent states are:

**Table 5. Agent states**

| State | Description |
|---|---|
| Hold | You are on the phone with a customer and have the call on hold. This state is automatically set for you by the ACD and does not have a corresponding button. |
| Logout | You are logged out of the ACD. |
| Not Ready | You are not available to receive routed calls. |
| 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 places you in a Not Ready state. The Reserved state is automatically set for you by the ACD and does not have a corresponding button. You can be in this state without the phone ringing (you are waiting for it to ring). |

Table 5. Agent states

| State | Description |
|---|---|
| Talking | You are on the phone with a customer or another agent. This state is automatically set for you by the ACD and does not have a corresponding button. |
| Work 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:<br>• you enter wrapup data (if enabled by the system administrator).<br>• a timer set in the ACD expires (if the ACD uses this feature).<br>• 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:<br>• you enter wrapup data (if enabled by the system administrator).<br>• a timer set in the ACD expires (if the ACD uses this feature).<br>• you manually change state after you enter wrapup data. |

# Using Chat

Chat allows you to send instant messages to other agents and to your supervisors. You can initiate a chat session by clicking **Chat** on the dashboard toolbar.

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

Some Chat features are:

- Each chat session is between you and one other party.
- You can participate in multiple concurrent chat sessions.
- The Chat Session window's title bar displays the name and extension of the person with whom you are chatting.
- High priority chat messages pop on your screen so they are immediately noticed, while normal priority chat messages are minimized and flash on your Windows task bar.
- Chat history (a log of chat messages sent between you and your chat partner) is available as long as the Chat Session window is open. Once you close the window, the log is lost.
- Chat history is in chronological order, with the oldest messages at the top of the log pane.

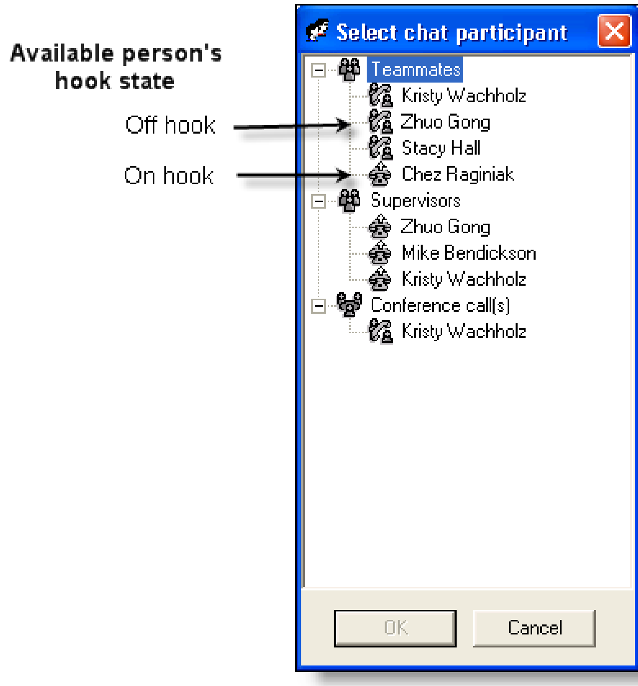
▶ **To chat with someone else:**

1. On the dashboard toolbar, click **Chat**.

   The Chat Selection window is displayed (see **Figure 15**).

   **NOTE:** The Chat Selection window is a snapshot—it displays the status of the people with whom you can chat only at the time you clicked the Chat button, and does not refresh those statuses while you have the window open.

Figure 14. Chat Selection window



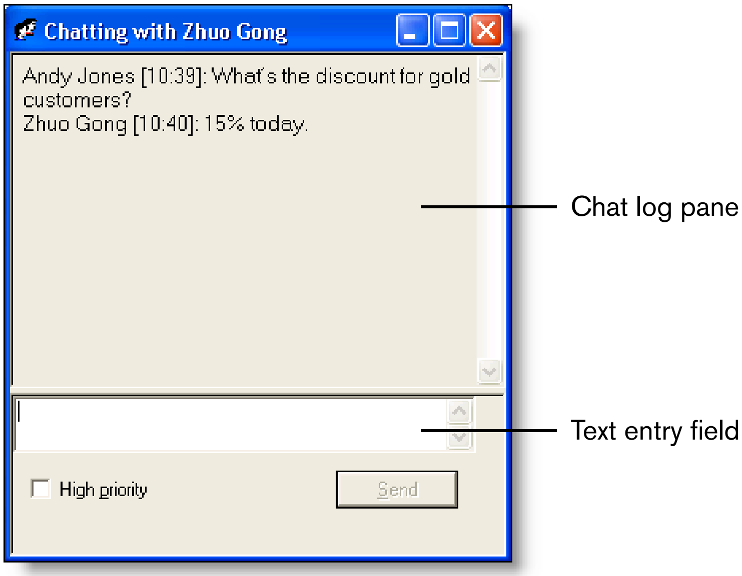

The window lists the people with whom you can chat: supervisors, agents, and participants in any conference call you are on.

An icon next to the name shows that person's hook state at the time you clicked the Chat button.

2. Double-click the name of the person with whom you wish to chat.

   A Chat Session window is displayed and a chat session is initiated with the selected person (see **Figure 15**).

**Figure 15. Chat Session window**




3. Type your message in the text entry field.
4. If you want your message to be noticed immediately by popping on the recipient's screen, check the **High priority** checkbox.
5. Click **Send** or press **Enter**.

   Your message is sent to your chat partner and logged in the chat log pane.

▶ **To terminate a chat session:**

- Click **Close** in the upper right-hand corner of the Chat Session window.

## 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 predefined message set up by your system administrator (for instance, "Please barge in to my call"). It appears in a Chat Session window that pops up on your supervisor's desktop. It behaves just like a chat message you send that is tagged as a high priority message.

# Outbound Option

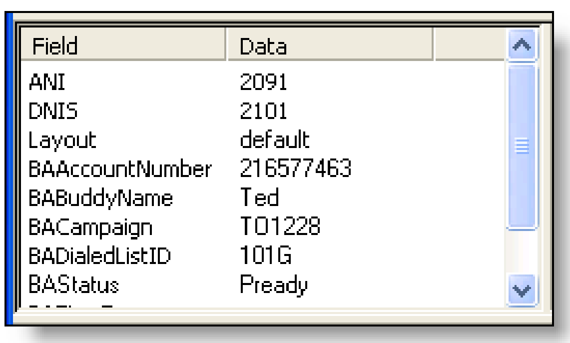
If set up by your system administrator, you may have task buttons associated with Outbound Option actions. These buttons enable you to accept, skip, reject, and call back the outbound calls to customers generated by the system, and remove yourself from a calling campaign. You can also categorize a phone number in a Direct Preview dialing mode campaign. Exactly which task buttons are associated with the Outbound Option actions is determined by your system administrator.

> **NOTE:** The Skip Call, Accept Call, and Reject Call buttons are enabled only when the calling campaign is configured to use the Preview or Direct Preview dialing mode. The Voice, Answering Machine, Invalid, and Fax Modem buttons are enabled only when the calling campaign is configured to use the Direct Preview mode. All these buttons are disabled in Predictive and Progressive dialing modes. The calling campaign dialing mode is configured by the system administrator.

Information about outbound option calls is displayed in the Enterprise Data pane (see **Figure 16**). Outbound option data field names are prefixed with "BA".

> **NOTE:** If a call is part of a Preview dialing mode campaign, the first letter in the BAStatus field entry is a P. If a call is part of a Direct Preview dialing mode campaign, the first letter in the BAStatus field entry is a D.

**Figure 16. Enterprise Data pane with Outbound Option data displayed.**




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 17). 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.)
- **Voice**. Tags the Direct Preview mode call as a customer contact.
- **Answering Machine**. Tags the Direct Preview mode call as an answering machine.
- **Invalid**. Tags the Direct Preview mode call as an invalid number.
- **Fax Modem**. Tags the Direct Preview mode call as a fax modem.

▶ **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:**

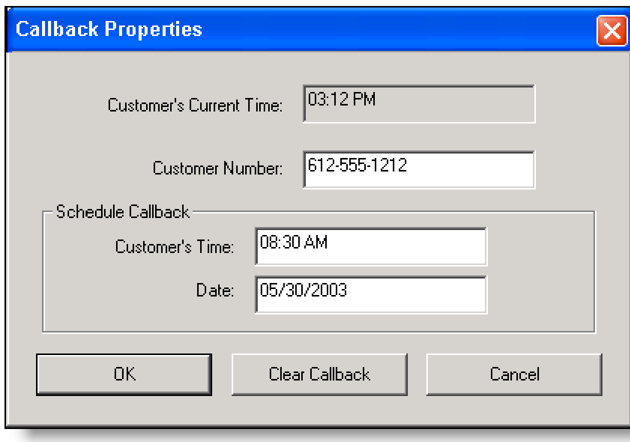
1. While in Talking or Wrapup state, click the task button associated with the Callback action.

   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 17. 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. |

**Callback Properties Dialog Box Fields (continued)**

| Field | Description |
|---|---|
| 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. |

# Agent Reports

There are several reports you can view in the Agent Report window. These reports are:

- Agent Call Log
- Agent ACD State Log
- Agent Statistics
- Skills Statistics

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

## Agent Call Log Report

The Agent Call Log report displays a record of calls made and received over the last seven days, by day. The information displayed is:

**Table 6. Agent Call Log fields**

| Field | Description |
|---|---|
| Call Start Time | The time the call started, in 24-hour format. |
| Call Direction | Inbound or outbound call. |
| Call Answered | Yes/No. |
| Calling Party | The number of the calling party. |
| Called Party | The number of the called party. |
| Call Duration | The length of the call, in HH:MM:SS format. |

▶ **To view the Agent Call Log report:**

1. On the dashboard toolbar, click **Reports**.

   The Agent Reports window is displayed.

2. From the Reports field, select the Agent Call Log report.

   The Agent Call Log report for the current day is displayed. You can update the information for the current day by clicking the Refresh button.

3. If you want to see a report from one of the previous 6 days, select the day from the Dates field.

   The report from the selected day is displayed.

## Agent ACD State Log Report

The Agent ACD State Log report displays a record of all ACD server state transitions for the current day. The report is in chronological order, and includes the following data:

**Table 7. Agent State Report fields**

| Field | Description |
|---|---|
| State Start Time | Time of the agent state transition. |
| Agent State | Agent state that you have entered. |
| 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. |
| State Duration | The amount of time you spend in the agent state. |

▶ **To view the Agent ACD State Log report:**

1. On the dashboard toolbar, click **Reports**.

   The Agent Reports window is displayed.

2. From the Reports field, select **Agent ACD State Log**.

   The Agent ACD State Log report for the current day is displayed. You can update the information by clicking the Refresh button.

## Agent Statistics Report

The Agent Statistics report displays your performance statistics for the current day. The data displayed is:

**Table 8. Agent Statistics Report fields**

| Field | Description |
|---|---|
| User Name | Your user name. |
| Agent | Your name. |
| Current State | The agent state you are currently in. |
| State Duration | The length of time you have been in the current agent state. |

Table 8. **Agent Statistics Report fields**

| Field | Description |
|---|---|
| Reason Code | Any reason code you entered, if you log out or the agent state you enter is Not Ready. |
| Max Ready | Single longest time spent in the Ready state. |
| Avg Ready | Average time spent in the Ready state. |
| Total Ready | Total time spent in the Ready state. |
| Max Not Ready | Single longest time spent in the Not Ready state. |
| Avg Not Ready | Average time spent in the Not Ready state. |
| Total Not Ready | Total time spent in the Not Ready state. |
| Max After Call Work | Single longest time spent in the Work Ready or Work Not Ready state. |
| Avg After Call Work | Average time spent in the Work Ready or Work Not Ready state. |
| Total After Call Work | Total time spent in the Work Ready or Work Not Ready state. |

▶ **To view the Agent Statistics report:**

1. On the dashboard toolbar, click **Reports**.

   The Agent Reports window is displayed.

2. From the Reports field, select the Agent Statistics report.

   The Agent Statistics report for the current day is displayed. The information is refreshed automatically every 30 seconds.

## Skills Statistics Report

The Skills Statistics report displays information about skill groups and the resources available to answer calls that are routed to them.

**Table 9. Skills Statistics Report fields**

| Field | Description |
|---|---|
| Skill Name | Name/ID of the skill group. |
| 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 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. |

▶ **To view the Skills Statistics report:**

1. On the dashboard toolbar, click **Reports**.

   The Agent Reports window is displayed.

2. From the Reports field, select the Skills Statistics report.

   The Skills Statistics report for the current day is displayed. The information is refreshed automatically every 30 seconds.

# Using the Integrated Browser

The integrated browser allows you to view intranet and internet web pages from within Agent Desktop.

**NOTE:** You must have Internet Explorer 6 [for CAD 6.0(x)] or Internet Explorer 7 [CAD 6.0(2) or greater] installed on your PC for the integrated browser to function.

**NOTE:** The integrated browser does not support popup windows from a secure website.

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

The system administrator can configure a specific web page to display in the browser pane as your home page. If the administrator does not do this, the pane is blank except for the message, “The home page is not configured in Desktop Administrator.”

If set up by your system administrator, Agent Desktop can use call enterprise data to interact with a web application, such as a customer database, and display customer information in the Integrated Browser.

## Accessing Work Sites

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

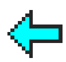
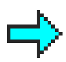
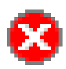
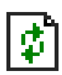
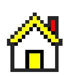
## Accessing Other Websites

If you wish to access a website that is not listed in the Work Sites box, enter its web address (URL) in the Address field and then press **Enter**.

## Browser Toolbar

The browser toolbar is the basic Internet Explorer toolbar. It allows you to navigate among webpages you view, refresh a current page, and return to your home page.

**Table 10. Browser toolbar buttons**

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

## Reason Codes

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

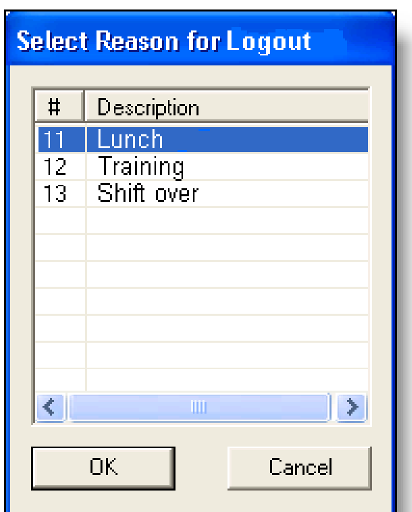
Reason codes describe why you have transitioned to the Not Ready or Logout agent state. These codes are set up by your system administrator and are customized for your contact center.

Whenever you initiate a transition to the Not Ready or Logout state, or such a transition is included in a work flow, a popup dialog box appears. (See **Figure 18**.) You must select the appropriate code from that dialog box and click OK in order to make the transition.

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

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

**Figure 18. Reason Code dialog box**



## Wrapup Data

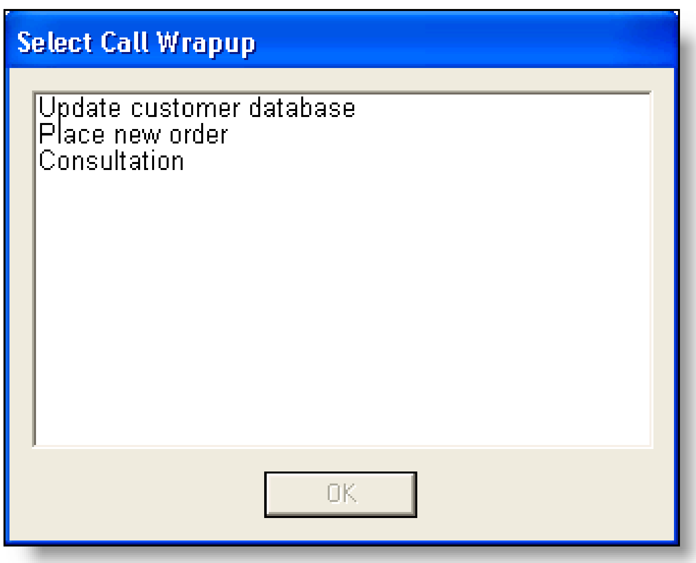
Agent Desktop can be configured by the system administrator so that you are required to enter wrapup data.

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.

If you transition to the Work Ready or Work Not Ready state immediately after ending a call (you clicked the Work Ready or Work Not Ready button during the call), the Select Call Wrapup dialog box appears (see Figure 19). You must select the appropriate description that sums up the call outcome and click **OK** before you can continue.

> **NOTE:** If a state timer is set in ICM, it is possible that the timer will expire and the Select Wrapup Data dialog box will disappear before you have made a selection. In that case, no wrapup data will be entered for that call.

**Figure 19. Select Call Wrapup dialog box.**



## Service Autorecovery

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

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

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

To learn more about what is affected by the service failure, double-click the status message on the status bar. CAD displays a popup box that lists CAD features and indicates if that feature is available or not due to the service outage. (See Figure 20.)

**Figure 20. Server Status popup window**