



## Basic Use of CTI Toolkit Agent Desktop

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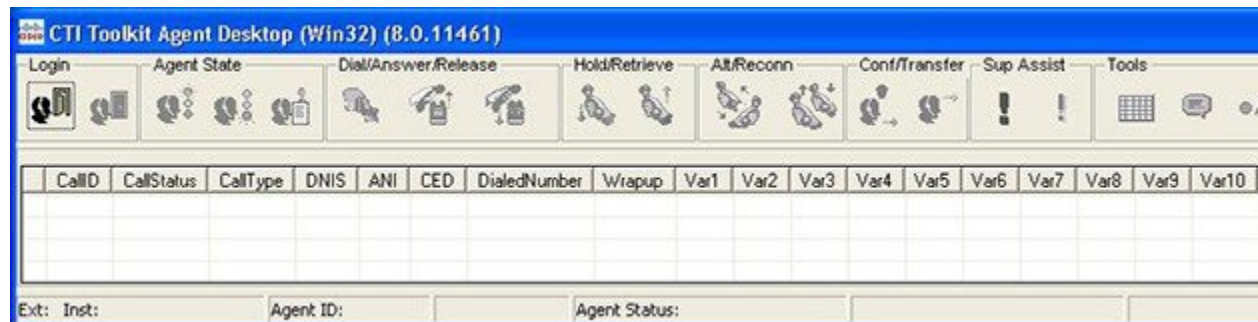
## CTI Toolkit Agent Desktop

The CTI Toolkit Agent desktop is compatible with the operating systems:

- Windows 7 - Standard, Ultimate, and Professional
- Windows 2008 R2 (Citrix only)

For more information, see the [Compatibility Matrix for Unified CCE](#).

To start CTI Toolkit Agent Desktop, select **Start > Programs > Cisco Systems CTI Toolkit > Agent Desktop**. Upon startup, the CTI Toolkit Agent Desktop main screen appears.



This screen includes the following options:

**Note**

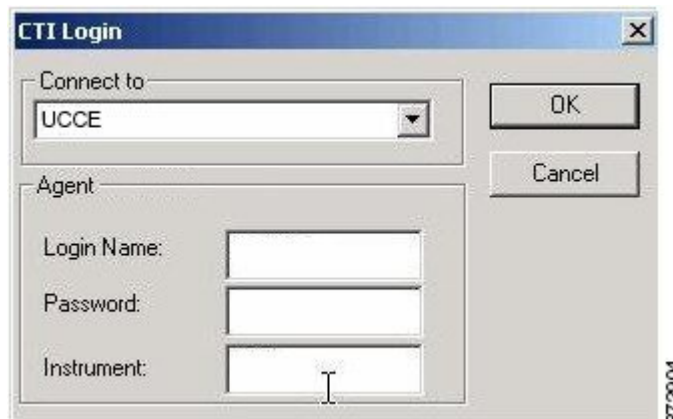
Keyboard equivalents and shortcuts related to these buttons and displays are described later in the sections on accessibility.

- **Login**—Contains buttons that let the agent log in or log out.
- **Agent State**—Contains buttons that let the agent change the state of the currently logged in agent.
- **Dial/Answer/Release**—Contains buttons that let the agent make, answer, and hang up calls.
- **Hold/Retrieve**—Contains buttons that let the agent put a call on hold and retrieve a held call.
- **Alternate/Reconnect**—Contains buttons that let the agent alternate between and reconnect active calls.
- **Conference/Transfer**—Contains buttons that let the agent start and complete conference and transfer operations.
- **Supervisor Assist**—Contains buttons that let the agent request assistance from a supervisor.
- **Tools**—Contains buttons that invoke statistical displays, start a chat session, record calls, and report a bad line.
- **Call Information**—Displays call-related data for each call currently on the softphone.
- **Status bar**—Displays information about the status of the softphone.
- **Video**—Opens the ViewMaster video browser page, if it was enabled during client setup.

## Log In to Desktop

### Procedure

- Step 1** Click **Login**.  
**Login** connects agents to the CTI Server and logs them in to a selected ACD switch. When you click **Login**, a dialog appears. The **Login** dialog varies for different peripheral types. This figure shows one of the **Login** dialogs.



**Step 2** Enter the following information in the dialog:

Setting	Description	Notes
Connect to	Use the drop-down menu to select your connection profile.	
Agent ID	Your agent ID as assigned by your manager.	Depending on an option chosen during the CTI OS Server installation, the Login dialog on the Supervisor desktop prompts for either the Agent ID or the Login Name.
Password	Your password as assigned by your manager	
Instrument	The device ID assigned to the phone set you receive calls on	
Mobile Agent	Optional setting. Check this box to log in as a Mobile Agent (that is, on a phone that Cisco Unified Communications Manager does not directly control).	The fields in the Mobile Agent area are accessible only when Mobile Agent is enabled in the deployment.
Phone Number	Optional setting. Enter the phone number on which the Mobile Agent receives calls. Enter the number in the format to dial the number from a Unified CM IP Phone, unless your system administrator instructs you to use another format.	CTI OS does not validate Mobile Agent phone numbers at login. Ensure that the number you enter is valid and correct. An invalid number causes the CTI OS desktop to show the incoming call, the customer to hear ringing, but the call is not routed to the agent phone.
Call Mode	Optional setting. Select one of the Call Modes from the drop-down: <ul style="list-style-type: none"> <li>• <b>Call-by-call</b>—Agent phone is dialed for each incoming call.</li> <li>• <b>Nailed connection</b>—Agent phone is dialed once immediately after logging in and remains connected through multiple customer calls.</li> </ul>	

**Note** The instructions in this guide do not address important differences that can apply when you log in as a Mobile Agent. See the *Mobile Agent Guide for Cisco Unified Contact Center Enterprise* at <http://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-user-guide-list.html> for instructions on desktops in a Mobile Agent deployment.

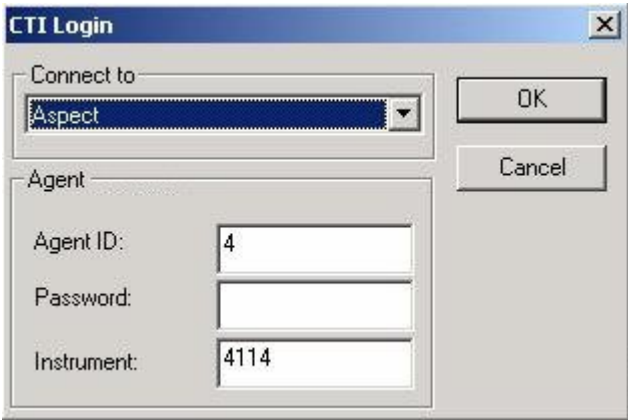
**Step 3** Click **OK**.  
After a successful login, the following occurs:

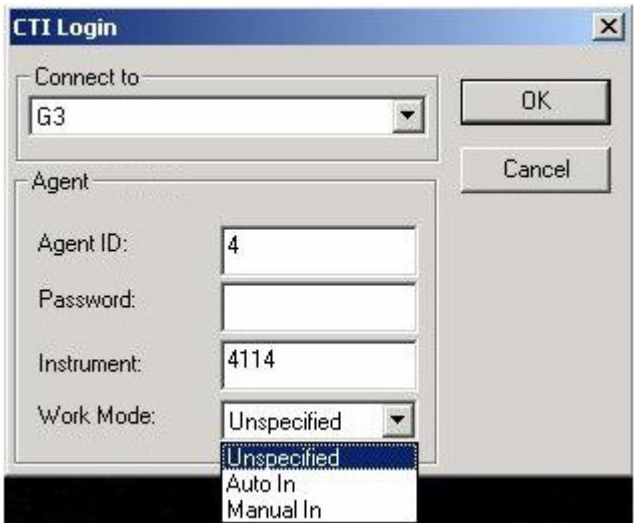
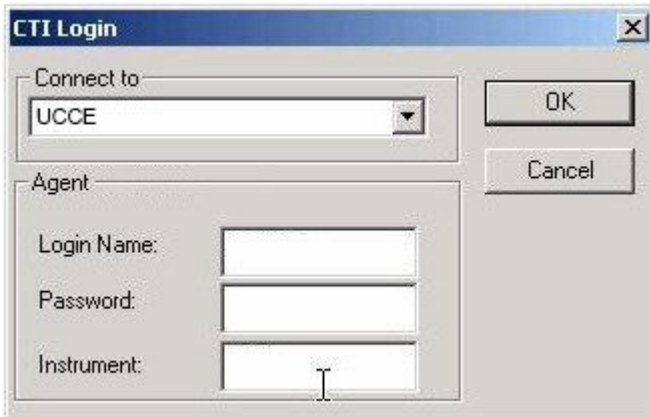
- You automatically enter the state configured on your switch, either Ready or NotReady state.
- The status bar on the bottom of the CTI Toolkit Agent Desktop Screen displays the following information:
  - Your Agent ID
  - The Agent Extension
  - The Agent Instrument
  - The current Agent Status
  - The server to which you connected
- The buttons are enabled for actions that you can take in your current agent state.

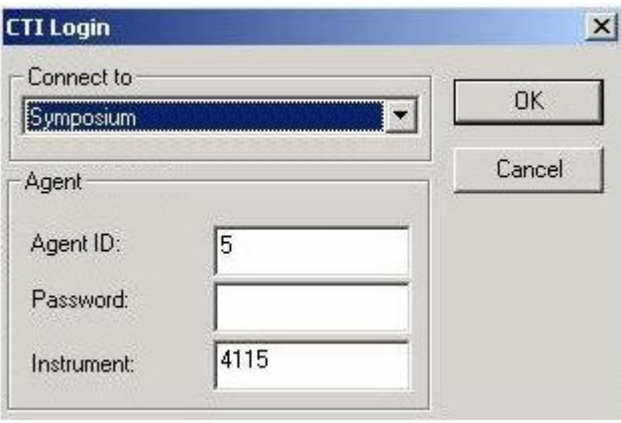
**Note** Multiple agents can log in to CTI Toolkit Agent Desktop on the same workstation. Each agent runs a separate instance of the desktop and then logs in as a different user.

## Peripheral Login Dialogs

The Login dialog varies, depending upon the peripheral type. The following table lists the differences between the Login dialog for each peripheral type.

Peripheral Type	Screenshot	Notes
Aspect ACD		Uses the standard settings: <b>Agent ID, Password, and Instrument.</b>

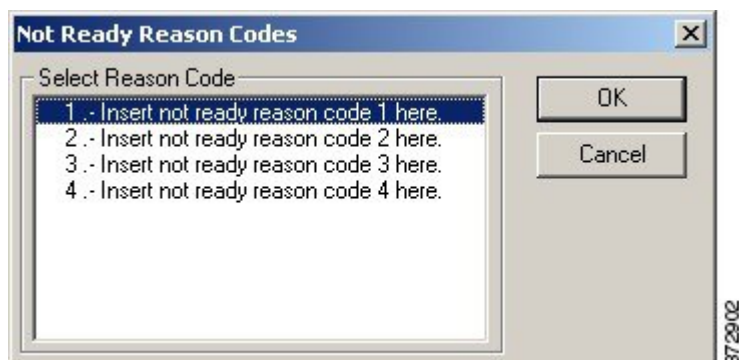
Peripheral Type	Screenshot	Notes
G3 ACD		<p>Includes a <b>Work Mode</b> setting which you set to a desired work mode. Used by Avaya DEFINITY ECS with default value of <b>Manual In</b>.</p>
UCCE		<p>There are a few UCCE peripheral types, but they use the same settings. Depending on an option chosen during the CTI OS Server installation, the Login dialog might prompt for either an Agent ID or a Login Name.</p>

Peripheral Type	Screenshot	Notes
Avaya Aura Contact Center ACD or Symposium ACD		Uses the standard settings: <b>Agent ID</b> , <b>Password</b> , and <b>Instrument</b> .

## Log Out of Desktop

### Procedure

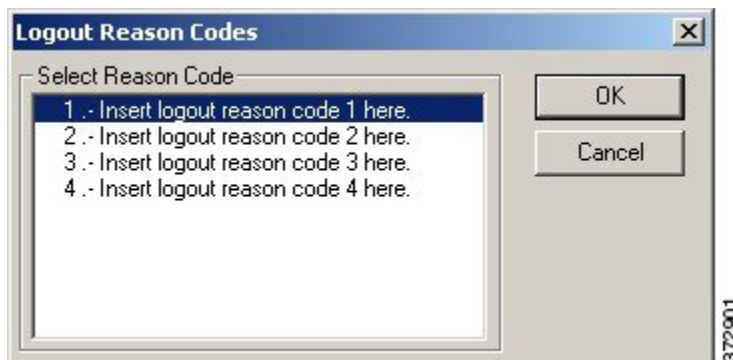
- Step 1** Click **NotReady** to prepare to log out.
- Only some switches require that an agent be in NotReady state to log out. The **Logout** button is disabled on those switches until your agent state is NotReady.
- Depending on the agent settings in your deployment, the **Not Ready Reason Codes** dialog appears after you click **NotReady**.



**Note** For information on how an administrator can set an agent's logout parameters, see the *Administration Guide for Cisco Unified Contact Center Enterprise and Hosted* at <http://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-maintenance-guides-list.html>.

**Step 2** Select a reason code from the list and click **OK**.  
When you enter the NotReady state, the **Logout** button becomes enabled.

**Step 3** Click **Logout**.  
Depending on the agent settings in your deployment, the **Logout Reason Codes** dialog appears.



**Step 4** Select a reason code from the list and click **OK**.  
After a successful logout, the following occurs:

- 1 You are logged out of CTI OS and the ACD switch.
- 2 All entries in the status bar become blank, except for **Agent Status**, which becomes "Unknown."
- 3 All Agent State Control buttons except **Login** are disabled.
- 4 All Call Control buttons are disabled.

**Note** In a Mobile Agent environment, if a Nailed-up mobile agent connection is dropped, the agent is logged out automatically. This situation can occur when a phone disconnects.

## Cisco IP Communicator

CTI Toolkit Agent Desktop supports IP Communicator as a replacement for Media Termination. IP Communicator is not installed as a part of CTI Toolkit Agent Desktop.

IP Communicator also does not start concurrently with CTI Toolkit Agent Desktop. Start IP Communicator manually. If you log in to Agent Desktop, and IP Communicator is not yet in service and registered with Unified CM, you might see the following error message:

CTI Warning: The request failed because a timeout limit was exceeded.

**Note**

The Cisco IP Communicator softphone includes features, such as Call Park and Pickup, that you cannot use for Unified CCE agents using the CTI Toolkit Agent Desktop. For all call-handling purposes, use the Agent Desktop controls. Also, to conserve resources, keep IP Communicator minimized as much as possible. If you have questions about IP Communicator, contact your system manager.

When you use IP Communicator with the desktop, set the following preferences:

- Uncheck **Bring to Front on Active Call**. (This setting is unchecked by default.)
- Check **Hide on Minimize**. (This setting is unchecked by default.)



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