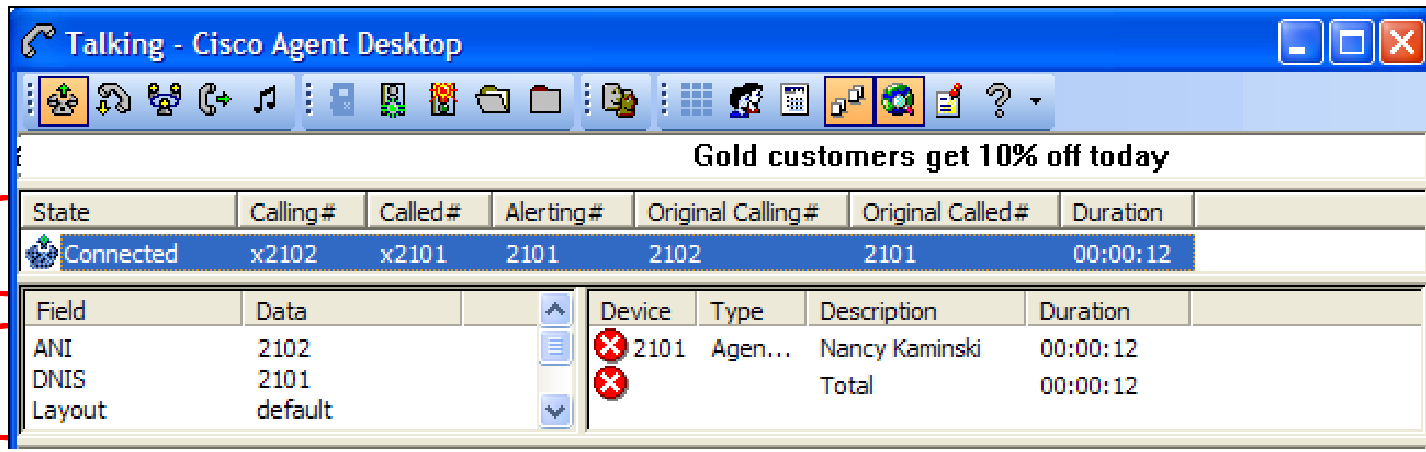
Getting to know your Cisco Agent Desktop

Dashboard Pane

Contact Management Pane

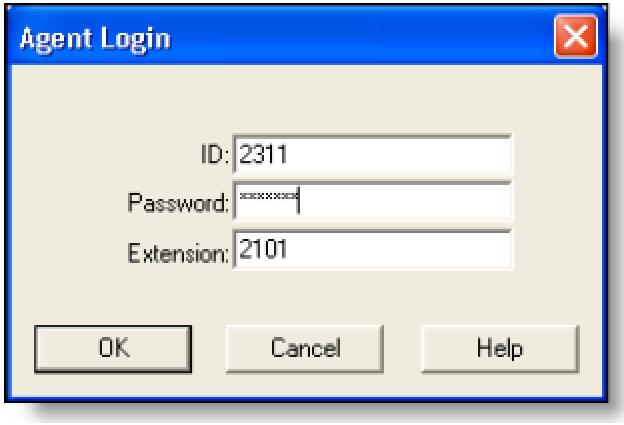


Starting your Cisco Agent Desktop

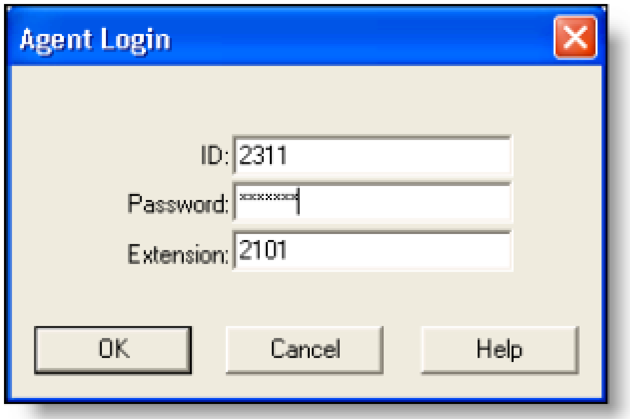
- Click the icon called **Agent** on your desktop, or

- Go to **Start** > **Programs** > **Cisco** > **Desktop** > **Agent**.

The Agent Login dialog box appears, as shown here.



Logging In to the Agent Desktop



Enter the following:

- **ID**: Your Connections username (ID is case sensitive.)
- **Password**: Your Connections password
- **Extension**: Extension of your phone

For Help Desk staff:
You will be assigned an ID and password.

After login, the Cisco Agent Desktop will start in minimized mode.

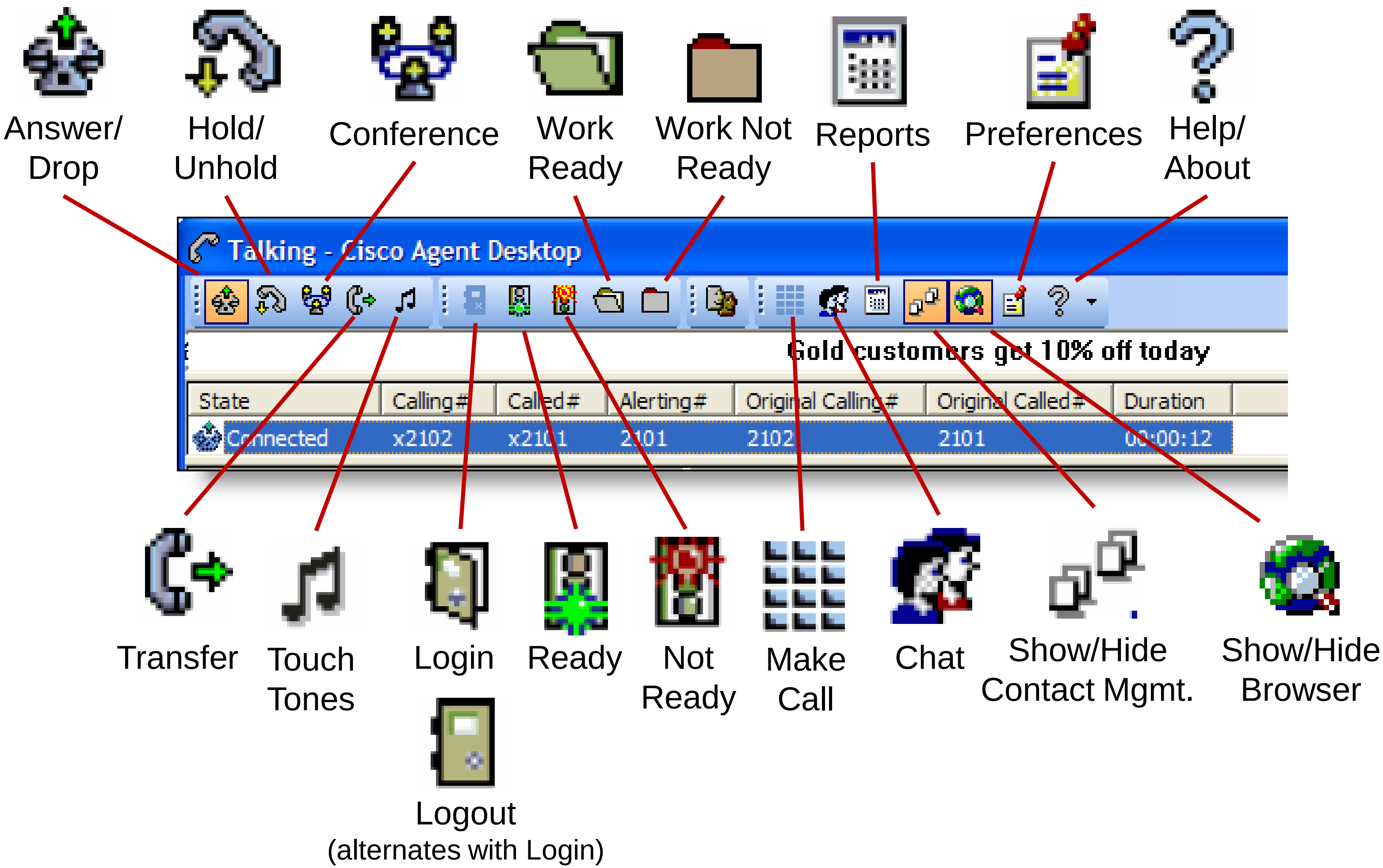
Agent States

Agent State will be **Not Ready** when you first start the Agent Desktop.

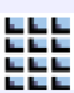
State	Description
Logout	You are logged out of the ACD.
Not Ready	You are not available to receive routed calls.
Reserved	You are temporarily set aside to receive a specific call. Your state changes to the Talking state when you answer the call. If you fail to answer the call within a time limit specified by the system administrator, the ACD places you in the 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).
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	You are completing work from a previous call and are unavailable to receive routed calls.

Dashboard Toolbar

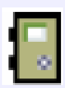
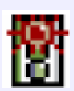
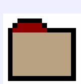
The illustration below shows the buttons on the Toolbar. Explanations of how the buttons are used are provided on the next few slides.



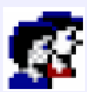
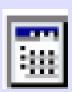
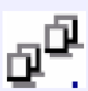
Call Control Buttons

Button	Name	Shortcut	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
	Make Call	Ctrl-M	Displays the dial pad so you can dial an outgoing call.

Agent State Buttons

Button	Name	Shortcut	Description
	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.
	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, indicating that you are in wrap-up 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 wrap-up work after terminating a call and, when finished, will not be available to receive ACD calls.

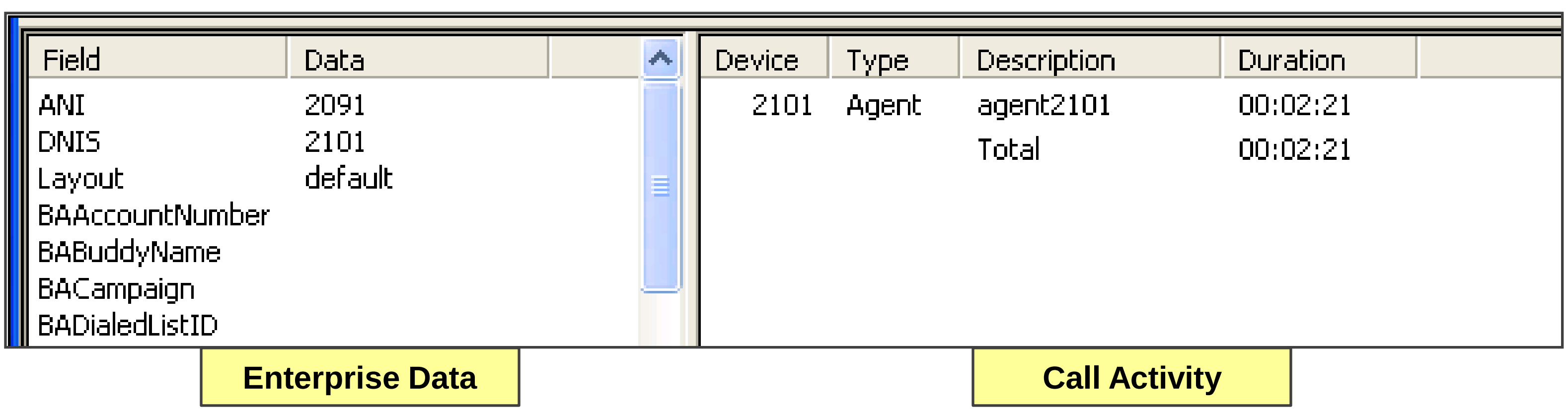
Other Toolbar Buttons

Button	Name	Shortcut	Description
	Task Button	ALT-(number)	Task Buttons are configured by your administrator. They perform functions such as running macros, launching applications, or sending predefined chat messages. There can be up to ten task buttons, and each can be assigned more than one action.
	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.
	Show/Hide 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.

Contact Management Pane

Contains:

- Enterprise data (Left Pane)
- Call activity information (Right Pane)
  - Will show the CSQ name the call has been routed too. (For example, CSQ = **HELP DESK**.)



Answering a Call

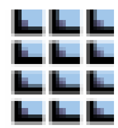
- You can receive ACD and non-ACD calls through Agent Desktop.
- You must be logged in and be in the **Ready** state to receive an ACD call.
- You can be in any state to receive a non-ACD call.
  - If you receive a non-ACD call, you are automatically put in the **Not Ready** state, and then returned to your previous state after the call ends.

Answering a Call

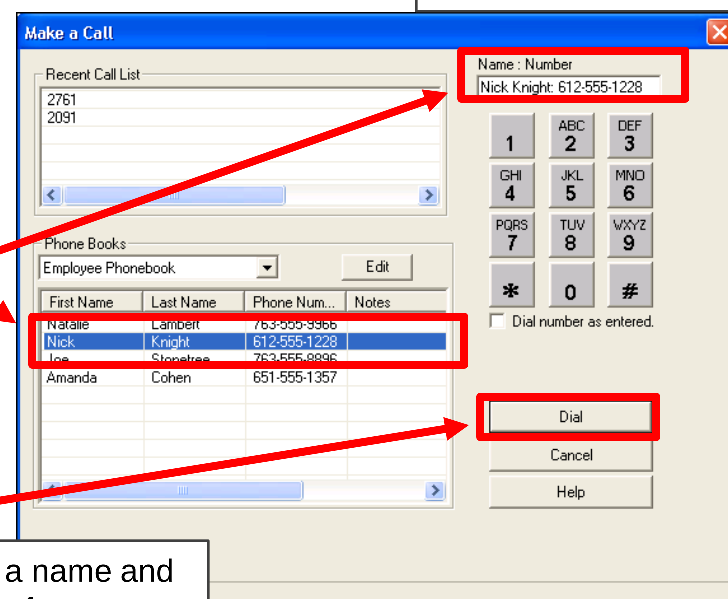
- ***To answer a call:***
  - On the Agent Desktop, click **Answer**, or 
  - On your phone, press the **Answer** softkey.
- ***To terminate a call:***
  - On the Agent Desktop, click **Drop**, or 
  - On your phone, press the **EndCall** softkey.

Making a Call

You can make a call from any agent state except Logoff, as long as you are not on a call.

- ***To place a call:***
  1. Click the **Make Call** button to open the Make a Call window.
  
  2. Enter the phone number or select a number from the a phone book.
  3. Click **Dial**.

…and it appears in the **Name:Number** field, ready to be dialed.



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

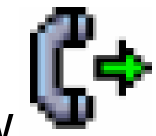
Transferring a Call

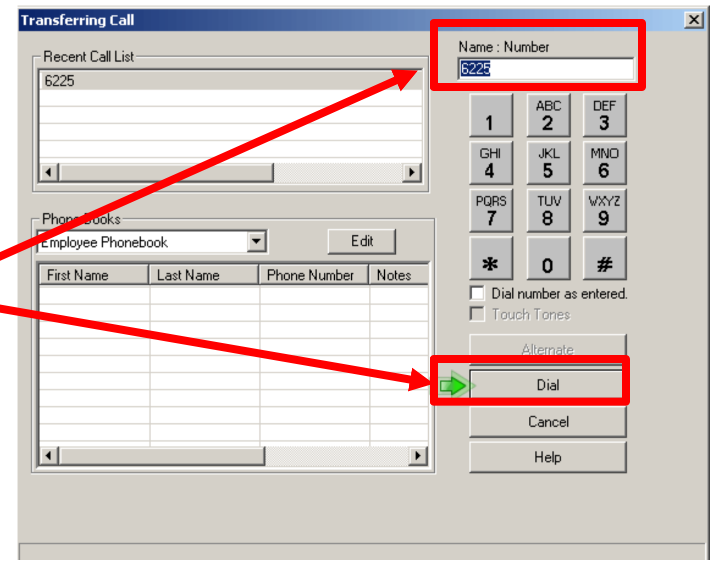
There are two types of transfer calls:

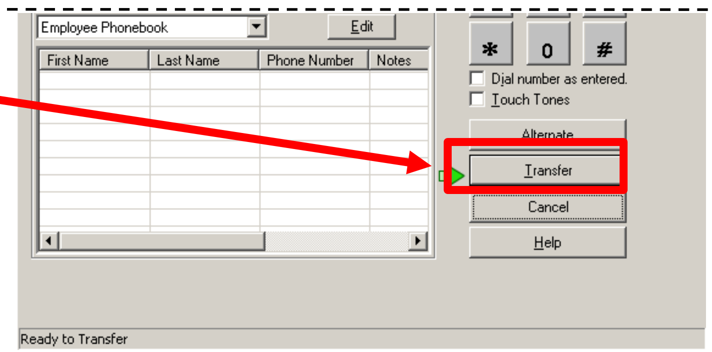
- **Supervised transfer** - In a Supervised transfer, you speak to the third party to whom the call is being transferred before connecting the active call, in order to confirm that the third party is ready to accept the call.
- **Blind transfer** - In a Blind transfer, you transfer the active call to 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.

Transferring a Call

- ***To transfer a call:***
  1. Click **Transfer** button**.** The Transfer Call window appears.
  2. Enter the phone number and click **Dial**.
  3. When the phone rings, the **Dial** button changes to the **Transfer** button.
  4. Click **Transfer** to transfer the call.







Making a Conference Call

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

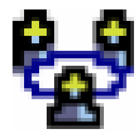
There are two types of conference calls:

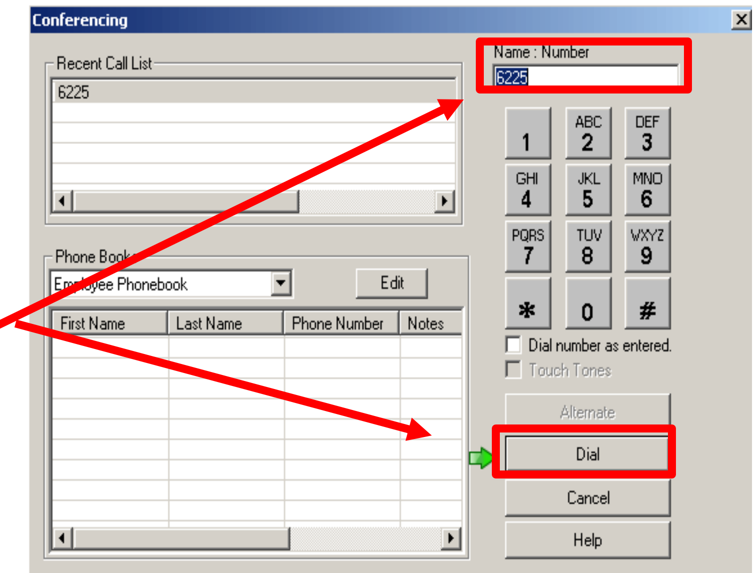
- **Supervised conference** - In a supervised conference, you speak to the third party you want to add to your call before completing the conference, in order to confirm that the third party is ready to accept the call.

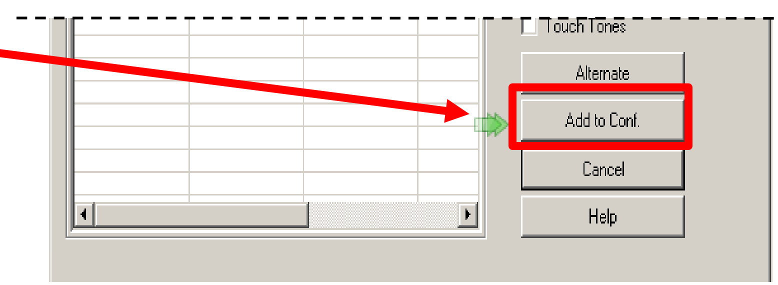
- **Blind conference** - In a blind conference, you add the third party to the conference without speaking to him or her.

Making a Conference Call

- ***To make a Conference Call:***

1. Click the **Conference** button.
   
   The Conferencing window appears.
2. Enter the phone number and click **Dial**.
3. When the phone rings, the **Dial** button changes to the **Add to Conf.** button.
4. Click **Add to Conf.**



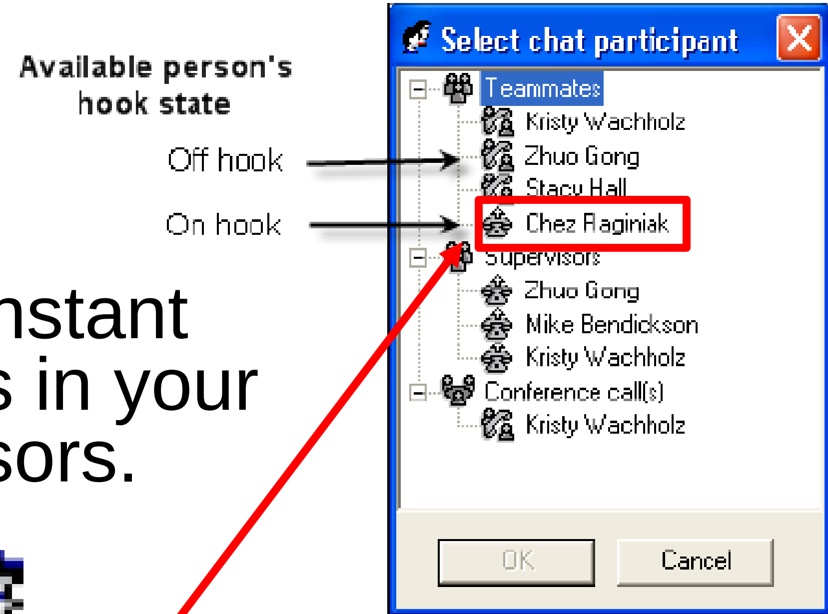


Supervisor Intervention

Your supervisor will be able to intervene in calls you receive. He or she can:

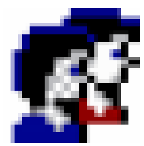
- **“Barge In” on a call** - Join your call with a customer in a forced conference.
- **“Intercept” a call** - Transfer a customer call to him or herself in a forced transfer.
- **Monitor your calls**
- **Record your calls**

Using Chat

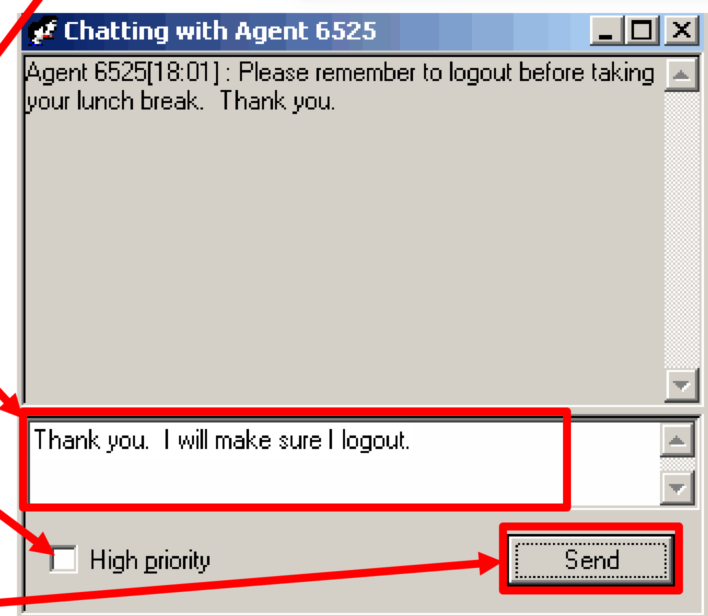


Chat allows you to send instant messages to other agents in your team and to your supervisors.

- ***To chat:***



1. Click the **Chat** button.
2. Double-click the name of the person with whom you wish to chat.
3. Type your message.
4. If you want your message to pop up so that the recipient notices it immediately, check the **High Priority** check box.
5. Press **Send**.

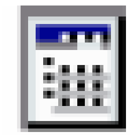


Agent Reports

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

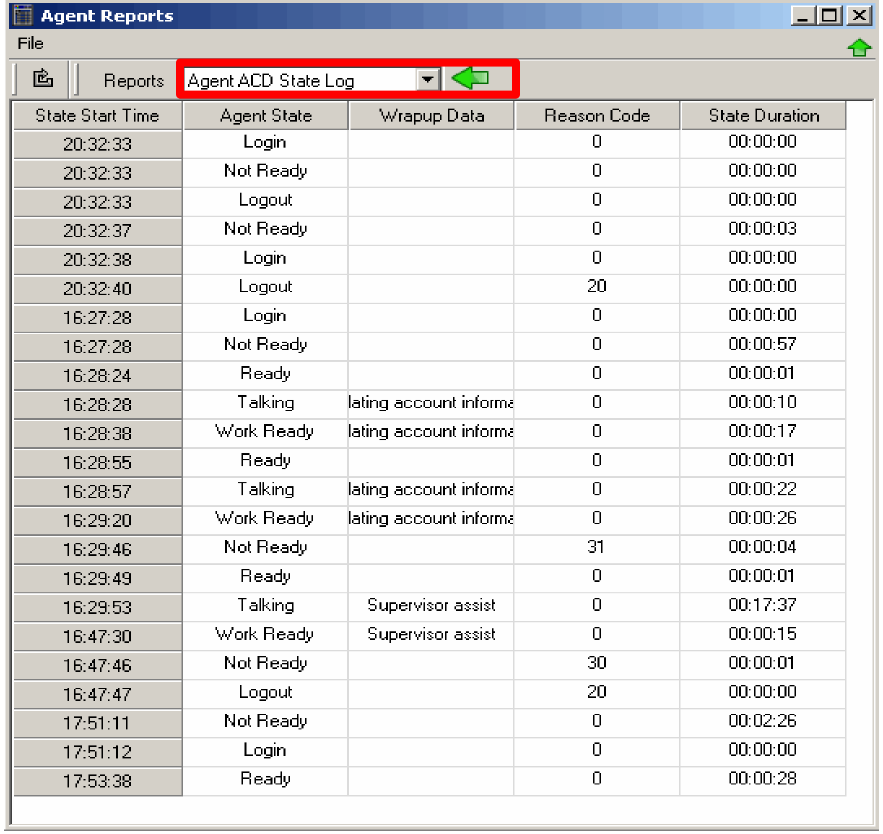
- Agent ACD State Log
- Agent Call Log
- Agent Statistics Report
- Skills Statistics Report

Agent Reports

- To run a report, click the **Reports**  button on the Toolbar.
- You can sort a report by any of the columns in the report in *ascending* or *descending* order.
- To sort a report, click a column header.

Agent ACD State Log

- Displays a record of all ACD server state transitions for the current day, starting at midnight.



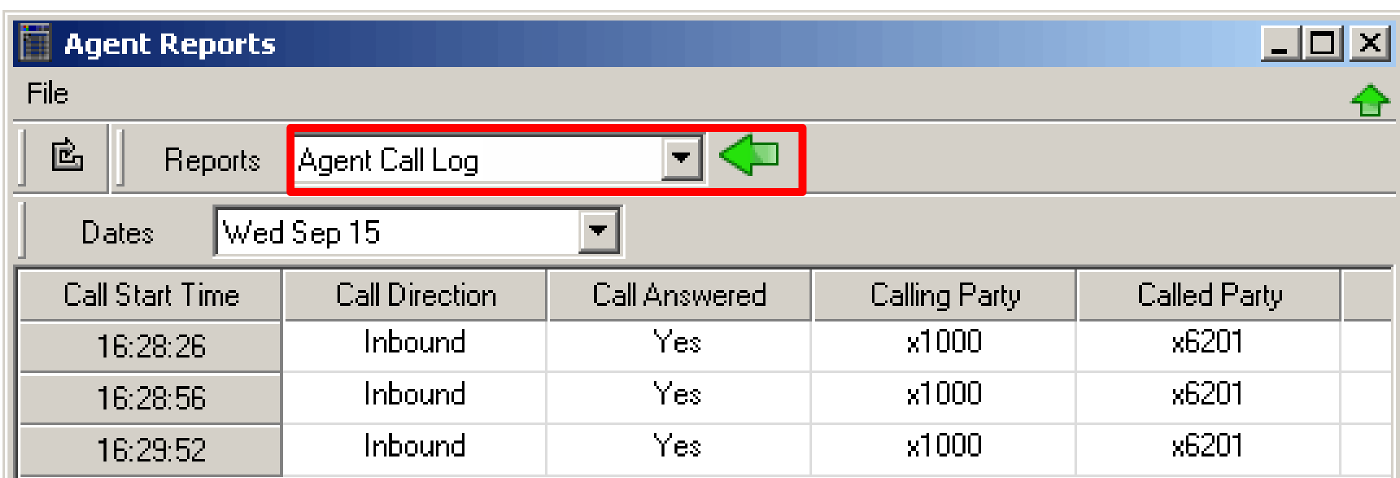
State Start Time	Agent State	Wrapup Data	Reason Code	State Duration
20:32:33	Login		0	00:00:00
20:32:33	Not Ready		0	00:00:00
20:32:33	Logout		0	00:00:00
20:32:37	Not Ready		0	00:00:03
20:32:38	Login		0	00:00:00
20:32:40	Logout		20	00:00:00
16:27:28	Login		0	00:00:00
16:27:28	Not Ready		0	00:00:57
16:28:24	Ready		0	00:00:01
16:28:28	Talking	lating account informa	0	00:00:10
16:28:38	Work Ready	lating account informa	0	00:00:17
16:28:55	Ready		0	00:00:01
16:28:57	Talking	lating account informa	0	00:00:22
16:29:20	Work Ready	lating account informa	0	00:00:26
16:29:46	Not Ready		31	00:00:04
16:29:49	Ready		0	00:00:01
16:29:53	Talking	Supervisor assist	0	00:17:37
16:47:30	Work Ready	Supervisor assist	0	00:00:15
16:47:46	Not Ready		30	00:00:01
16:47:47	Logout		20	00:00:00
17:51:11	Not Ready		0	00:02:26
17:51:12	Login		0	00:00:00
17:53:38	Ready		0	00:00:28

Agent ACD State Log - Fields

Field	Description
Start Time	The time the ACD agent state was initiated. Start time is based on the time the Recording & Statistics service received the ACD agent state data from Agent Desktop; therefore the start time reflects the Recording & Statistics server time, not the time shown on your PC. If the Recording & Statistics server and the agent PC are in different time zones, this is taken into account.
Agent State	The last ACD agent state written to the log is actually the previous ACD state that you were in. In order to calculate State Duration, the current state cannot be written to the log until you transition to the next ACD agent state.
Wrap-up Data	Any wrap-up data you entered, if the agent state you transition to is Work Ready or Work Not Ready.
Reason Code	A number followed by a string description in parentheses identifying why the agent is in the current state. Displays 0 (zero) if there is no reason code. This field only applies to the Not Ready and Logout states.
State Duration	The amount of time you spend in the agent state.

Agent Call Log

- Displays a record of calls made and received over the last seven (7) days
- Listed chronologically, starting at midnight each day.

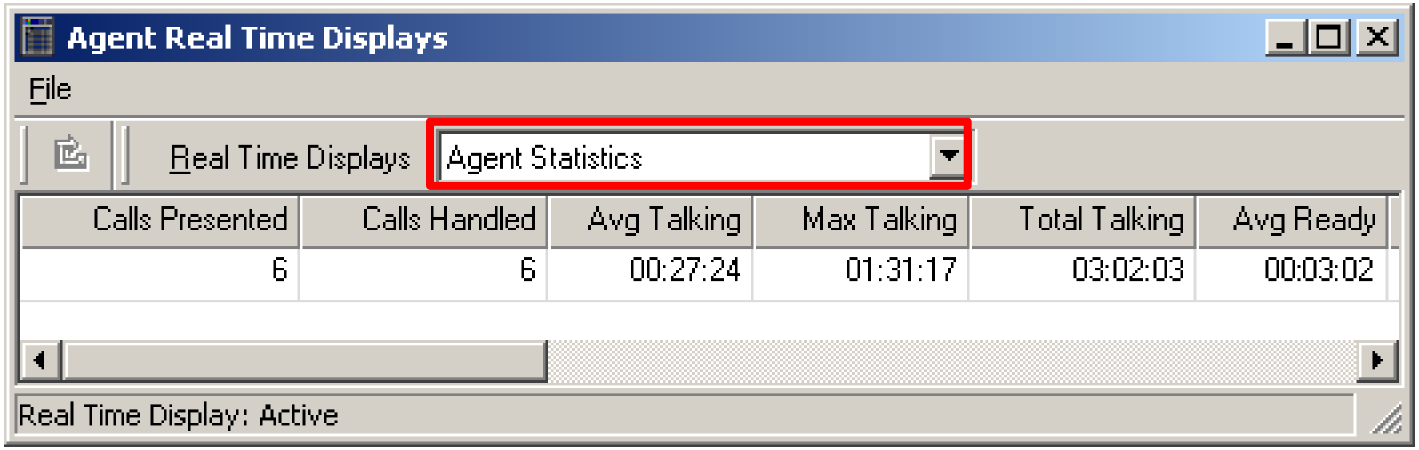


Agent Call Log - Fields

Field	Description
Start Time	The time the call started. Start time is based on the time the Recording & Statistics service receives the state data from Agent Desktop, therefore the start time reflects the Recording & Statistics server time, not the time shown on your PC. If the Recording & Statistics server and the agent PC are in different time zones, this is taken into account.
Direction	Inbound or outbound call.
Answered	Yes/No. Was the call answered?
Calling Party	The number of the phone that made the call.
Called Party	The number of the phone that received the call.
Call Duration	The length of the call. For inbound calls, call duration = ring time + talk time + hold time. For outbound calls, call duration = dialtone + ringback + talk time + hold time.

Agent Statistics Report

- The Agent Statistics report displays your performance statistics for the current day, starting at midnight.



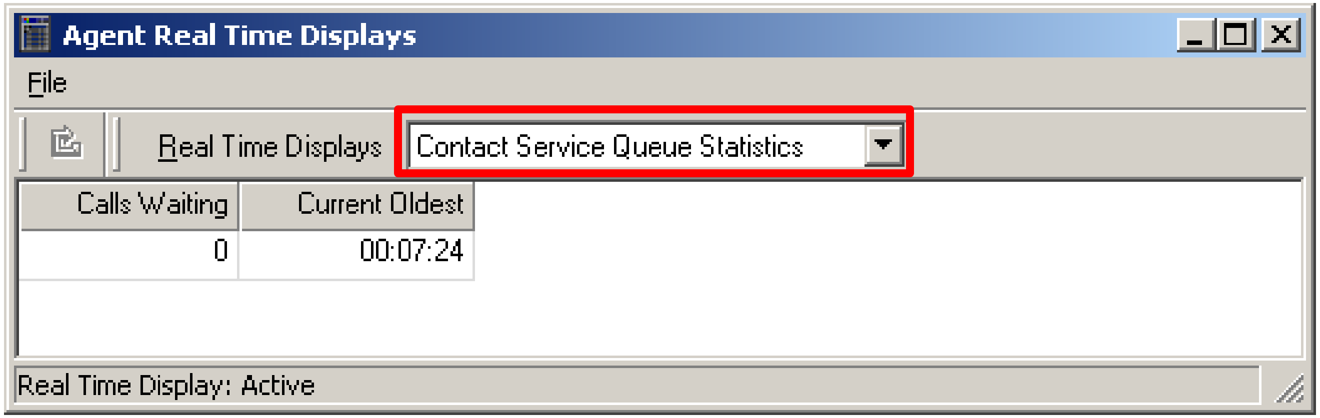
Agent Statistics Report - Fields

Field	Description
Calls Presented	Number of inbound calls (ACD or non-ACD) that are delivered to your extension (causes your phone to ring).
Calls Handled	Number of inbound calls (ACD or non-ACD) that are answered at your extension.
Avg Talking	Total time on calls (all talk time + all hold time) divided by the number of calls.
Max Talking	Length of the longest call (talk time + hold time).
Total Talking	Total time on calls (all talk time + all hold time).
Avg Ready	Total time spent in the Ready state divided by the number of times spent in the Ready state.
Max Ready	Longest time spent in the Ready state.

Field	Description
Total Ready	Total time spent in the Ready state.
Avg Not Ready	Total time spent in the Not Ready state divided by the number of times spent in the Not Ready state.
Max Not Ready	Longest time spent in the Not Ready state.
Total Not Ready	Total time spent in the Not Ready state.
Avg After Call Work	Total time spent in the Work Ready or Work Not Ready states divided by the number of times spent in those states.
Max After Call Work	Total time spent in the Work Ready or Work Not Ready states divided by the number of times spent in those states.
Total After Call Work	Total time spent in the Work Ready or Work Not Ready state.

Contact Service Queue Statistics Report

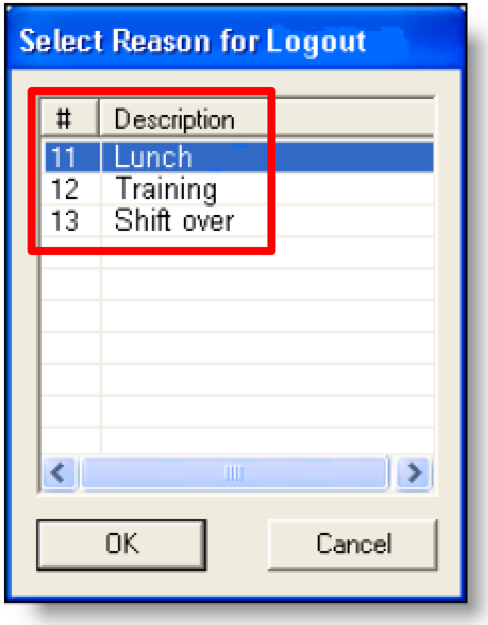
- Displays information about skill groups and the calls routed to them.



Field	Description
Calls Waiting	Number of calls currently in the queue.
Current Oldest	Duration of the oldest call in the queue.

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.

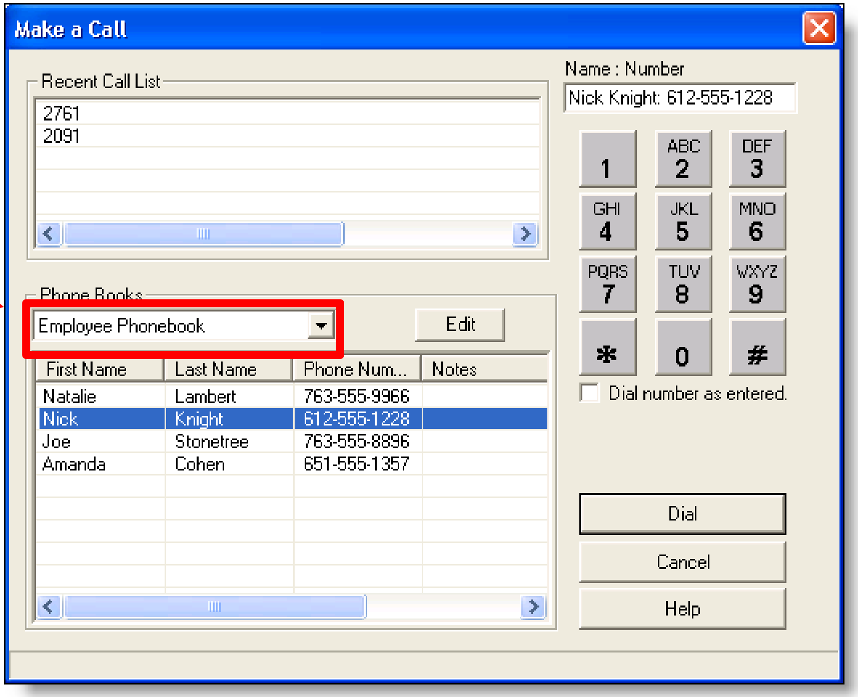


Phone Books

- Phone books are phone number lists. Two are available.

Phone Book	Set Up By?	Editable?
Employee	You	Yes
Public	System Administrator	No

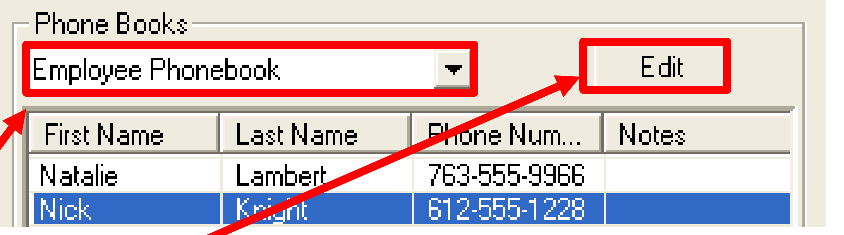
- Click the drop-down arrow to choose the phone book you want to use.

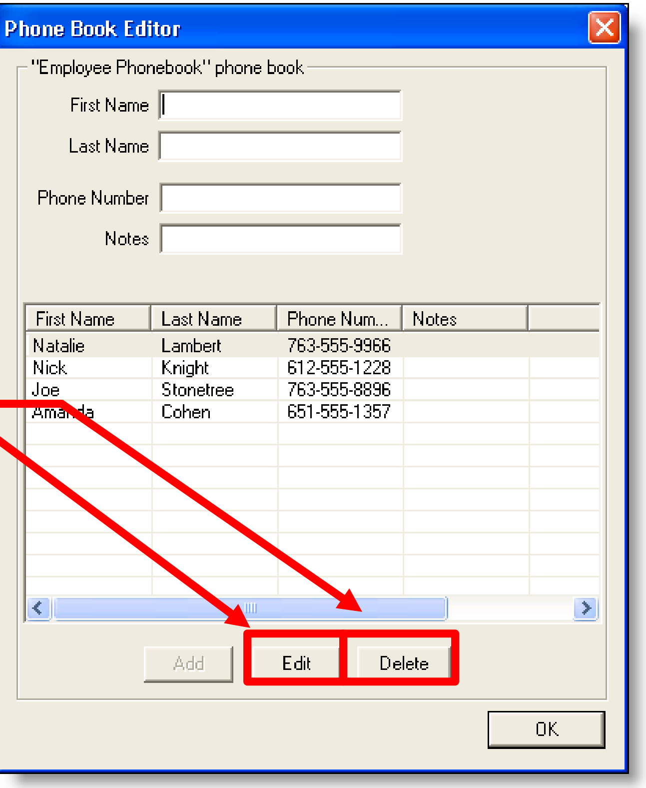


Note: The system administrator can configure Agent Desktop so that one or both types of phone books are unavailable.

Employee Phone Book

- ***To edit your phone book:***
  1. Select your Employee phone book.
  2. Click **Edit**.
     The Phone Book Editor window opens.
  3. To edit an existing entry, select it and click **Edit**.
  4. To delete an existing entry, select it and click **Delete**.

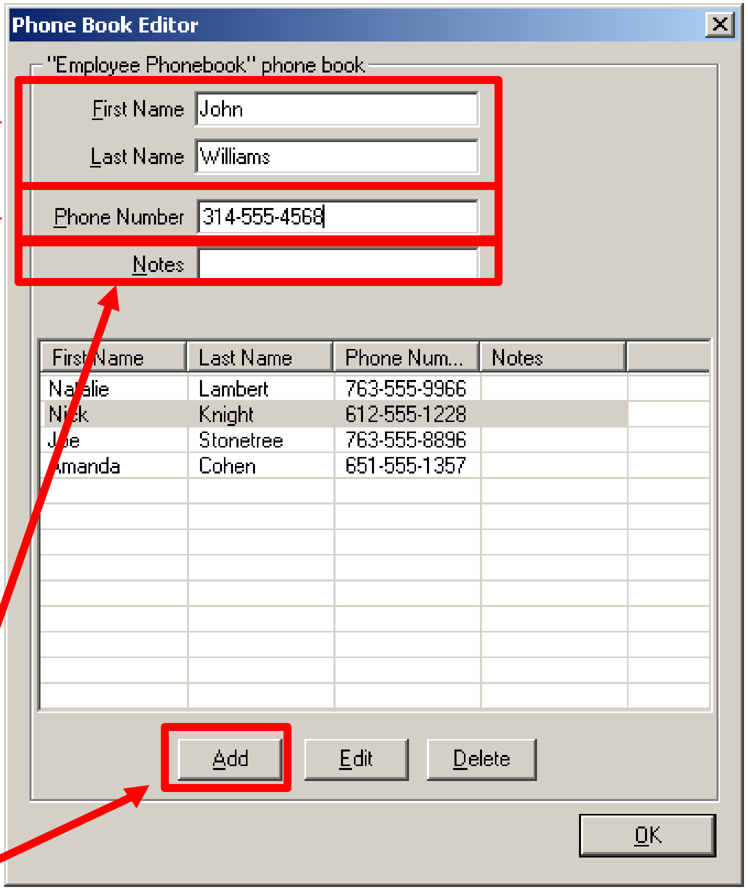




Employee Phone Book

- ***To add an entry:***
  1. Complete First Name and Last Name.
  2. Type the Phone Number .

     <u>Do not add *9* for external numbers.</u> IPCC has its own Dialing Rules configured and will add the *9* for you.
     For example, type
     1-888-456-1234 and not
     9-1-888-456-1234.
  3. Enter any notes you want.
  4. Click **Add**.



Window Behavior Mode

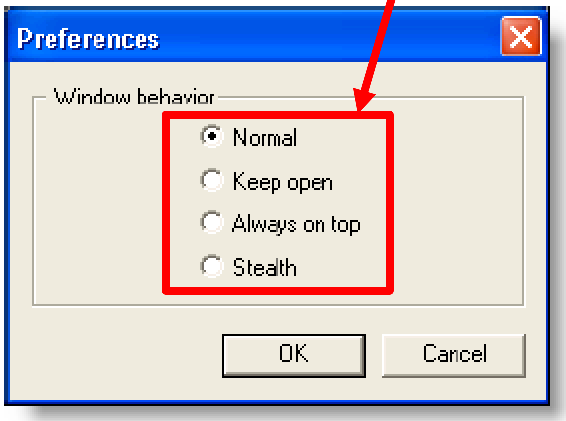
- By default, the Agent Desktop interface is minimized when idle and appears when calls are present (Normal mode).

- You can change this behavior mode using the Preferences dialog box.

Window Behavior Mode

- ***To change the mode:***

  1. Click the **Preferences** button on the Toolbar. The Preferences window opens.
  2. Select a mode.
  3. Click **OK**.



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.