# TABLE OF CONTENTS

- Introduction to Cisco Agent Desktop .......................................................... 3
- 1 Login / Logout ............................................................................................. 4
  - 1.2 Logout ........................................................................................................ 4
- 2 Introducing the Main Screen ...................................................................... 5
  - 2.1 The Status Bar .......................................................................................... 5
  - 2.2 The Dashboard Pane ............................................................................... 5
  - 2.3 Contact Management Pane ................................................................. 6
- 3 Choosing An Agent State ........................................................................... 8
- 4 Basic Call Handling ................................................................................... 9
  - 4.1 Answer a Call ........................................................................................... 9
  - 4.2 End a Call ................................................................................................. 9
  - 4.3 Make a Call ............................................................................................... 9
  - 4.4 Put a Call on Hold .................................................................................... 9
  - 4.5 During a Call ............................................................................................ 9
- 5 Transferring a Call ................................................................................... 10
- 6 Phone Book ................................................................................................ 12
- 7 Using Chat ................................................................................................ 13
- 8 Agent Real Time Displays ........................................................................ 15
  - 8.1 Agent Call Log Display .......................................................................... 15
  - 8.2 Agent ACD state log display ................................................................... 16
  - 8.3 Agent detail display ................................................................................ 17
  - 8.4 Skills Statistics Real Time Display ......................................................... 17
- 9 Changing your Preferences ...................................................................... 18
  - 9.1 Setting your Desktop Preferences ......................................................... 18
  - 9.2 Setting the Accessibility preferences ..................................................... 19
INTRODUCTION TO CISCO AGENT DESTOP

The Cisco Agent Desktop is the new automated call distribution (ACD) software to accompany the new IP Phones. There are a few items that you should consider when using this system.

- The call queues are passed to the longest inactive agent. These settings can be changed by IS Service Desk.
- Whilst using this system, group **pickups should NOT be used**.
- You can use the phone rather than the software to answer, end, transfer, conference calls and place them on hold.
- If you are using a headset and your headset is on, clicking answer will automatically put the call through to your headset. If not you will either be on speakerphone or call pick up the handset to speak to the caller through the receiver.
- If you do not answer a call routed through the ACD system, your state will change to Not Ready.
- When you first login your status is Not Ready and calls will not be routed to you until you change your state to Ready.
- You can change your state during a call to choose the state you will be in when the call ends.
- You can chat with a supervisor if you want assistance or for them to barge in to your call.
- You can record your calls, but only supervisors can replay them (please note callers must have been informed that they are being recorded).
- When you end a call you are given an amount of Work time before you are ready to receive calls unless you change your status (this is set by IS).

Please note: The images/screen shots used have the **large toolbar buttons preference** switched on, which are not on as default.
1 LOGIN / LOGOUT

Step 1

Choose Start > All Programs > NTU-WIDE Applications > Unified Comms > Cisco Desktop Agent

You will be prompted with the Login dialog box as shown in the diagram below.

Step 2

Enter your login ID, password and extension number. Your ID is your extension and the password is cisco.

Step 3

Check Extension: displays the extension of the handset on your desk

Note: Agent Desktop remembers your details from the first time you log in. It is automatically entered the next time you log in.

Step 4

Click on OK and the program will open (but will be minimized on your desktop). Maximise the Window by clicking on it in your taskbar;

Step 5

When you first log on your status is “Not Ready” to take calls.

When you are ready to take calls you will need to change your state to Ready.

1.2 LOGOUT

Step 1 – Change state to Not Ready (see chapter 3 on States)

Click on Not Ready

Step 2 – Click Logout

Click on Logout
2 INTRODUCING THE MAIN SCREEN

The Main Screen can be split into 4 distinct areas:

- Dashboard Pane (Top level controls - log in/out etc)
- Contact Management Pane (the calls)
- Status Bar – Shows current status and extension number.

![Agent Desktop Main Screen](image)

Figure 1 – Agent Desktop Main Screen

2.1 THE STATUS BAR

Shows the agents name, extension number, agent state, duration of state, if phone connected and current time. Your status is also shown in the Software Title Bar.

2.2 THE DASHBOARD PANE

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

- Dashboard toolbar – Contains buttons for call control and for functions not related to customer contact
- Contact appearance – displays data about agent’s current call.
### TOOLBAR ICONS

- **Answer/Drop**
- **Hold / Unhold**
- **Conference**
- **Transfer**
- **Dial Tones**
- **Login / Logout**
- **Change State to Ready**
- **Change State to Not Ready**
- **Change State to Work (at end of call)**
- **Start Recording**
- **Stop Recording**
- **Chat**
- **Make Call**
- **Reports**
- **View / Hide Contact Management**
- **Preferences**
- **Help**

### 2.3 CONTACT MANAGEMENT PANE

![Contact Management Pane](image-url)
The contact management pane contains system data (on the left) and call activity information (on the right) for all inbound and outbound calls. You can click the Show/Hide Contact Management button on the dashboard toolbar to show or hide this pane of the Agent Desktop interface (but only if your screen isn’t maximized).

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

<table>
<thead>
<tr>
<th>Device</th>
<th>List of devices the call has passed through</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Type of device the call passed through</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the device the call passed through</td>
</tr>
<tr>
<td>Total</td>
<td>Sum of all the durations listed</td>
</tr>
</tbody>
</table>

**So for example** the above call in progress was a call made to 81100 which sat in the IPCC Training 1 CSQ (queue) for 20 seconds and then this was sent to the agent. If you are an agent for more than one call queue for example you are answering clearing calls for more than one subject area, you will be able to see which ACD Group it has been filtered through by looking for the CQS Type.
3 CHOOSING AN AGENT STATE

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.

Choose from one of the following agent states:

- Login
- Logout
- Change Status to Ready
- Change Status to Not Ready

AGENT STATES ARE DESCRIBED AS BELOW:

- **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 ACD calls
- **Ready** You are available to receive ACD calls
- **Reserved** You are temporarily set aside to receive a specific ACD or Unified Outbound Dialer call (i.e. your phone is ringing). 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).
- **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 ACD calls. This status may have been added to the end of a call for wrap up time and so may not be available from the toolbar, unless you want to change your status whilst on a call.
4 BASIC CALL HANDLING

4.1 ANSWER A CALL

Click Answer, (if using a headset this will come through to your headset if it is already on). If using handset you will also need to pick up the handset after clicking answer, or answer using your phone.

4.2 END A CALL

Click Drop on your desktop or End Call using your phone.

4.3 MAKE A CALL

**Step 1**

Click on the dial pad icon. You will be presented with the Make a Call window.

**Step 2**

Enter the number using your keyboard

or by clicking on the numbers on the dial pad

**Step 3**

Press enter or click on Dial to call the number

OR Make a call using your phone

![Make a Call window](image)

4.4 PUT A CALL ON HOLD

Click on the Hold / Unhold icon or press Hold on your phone.

To retrieve call, click on Hold / Unhold again or use your phone.

4.5 DURING A CALL

Whilst you are on a call you can **choose which state you want to be in when the call ends**. This is set to send you into Work then ready after a preset time for wrap up.

You can however if you are going out after hanging up your call, change your status to Not-Ready and this will be your status once you hang-up.
5 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**

**Step 1**

With a call active, click/press Transfer.

**Step 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 Keyboard
- Dialling the number with the dial pad
- Selecting an existing number from the Recent Call List or a phone book.

**Step 3**

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

**Step 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.
Your phone book can have an unlimited number of entries

To edit your employee phone book:

Step 1
Click on the dial pad icon.

Step 2
Check Employee Phonebook
is showing and click Edit.

Step 3
The Phone Book Editor appears.

Step 4
Do one of the following actions:

- To add a new entry –
  Enter the data into First Name, Last Name
  Phone Number and Notes then click Add

- Edit an existing entry
  Select the entry you wish to edit and
  click Edit. Make your changes and select
  OK.

- Delete an existing entry
  Select the entry you wish to delete
  and click Delete.

Step 5 - When all your changes are complete, click OK.
7 USING CHAT

Chat enables you to send instant messages to other agents on your team and to your supervisors.

Chat features include:

- 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 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 the 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.
- You can send and receive chat messages even if you are logged out of the ACD, as long as Agent Desktop remains open.

TO CHAT WITH SOMEONE ELSE:

**Step 1** Select Chat from the main toolbar.

The ‘Select chat participant’ window appears.

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

An icon next to the name shows whether that person is on the phone 📞 or not 🗣 at the time you clicked the Chat button.
Step 2

Double click on the person you wish to chat.

A Chat Session window is displayed and a chat session is initiated with the selected person.

Step 3

Type your message in the text entry field and either:

- Hit the Enter Key or click Send.
8 AGENT REAL TIME DISPLAYS

There are several real-time displays you can view in the Agent Real Time Displays window. These displays are:

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

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

To view a real time display:

**Step 1**

On the dashboard toolbar, click Reports.

The Agent Real Time Displays window is displayed.

**Step 2**

From the Real Time Displays field, select the display you want to view.

The selected display appears. You can update the information by clicking the Refresh button.

8.1 AGENT CALL LOG DISPLAY

The Agent Call Log Display shows a record of calls made and received over the last seven days, by day.
**Start Time** - The time the call is started.

**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 = dial tone + ringback + talk time + hold time.

### 8.2 AGENT ACD STATE LOG DISPLAY

<table>
<thead>
<tr>
<th>Start Time</th>
<th>Agent State</th>
<th>Wrap-up Data</th>
<th>Reason Code</th>
<th>State Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:42:50</td>
<td>Ready</td>
<td>0</td>
<td>0</td>
<td>00:01:22</td>
</tr>
<tr>
<td>11:44:12</td>
<td>Reserved</td>
<td>0</td>
<td>0</td>
<td>00:00:10</td>
</tr>
<tr>
<td>11:44:22</td>
<td>Talking</td>
<td>0</td>
<td>0</td>
<td>00:02:17</td>
</tr>
<tr>
<td>11:46:39</td>
<td>Work</td>
<td>0</td>
<td>0</td>
<td>00:01:00</td>
</tr>
<tr>
<td>11:47:39</td>
<td>Ready</td>
<td>0</td>
<td>0</td>
<td>00:04:13</td>
</tr>
<tr>
<td>11:51:52</td>
<td>Reserved</td>
<td>0</td>
<td>0</td>
<td>00:00:12</td>
</tr>
<tr>
<td>11:52:04</td>
<td>Not Ready</td>
<td>32763 (Fing no answer)</td>
<td>0</td>
<td>00:04:54</td>
</tr>
<tr>
<td>11:56:58</td>
<td>Ready</td>
<td>0</td>
<td>0</td>
<td>00:00:06</td>
</tr>
</tbody>
</table>

The Agent ACD State Log Display shows a record of all ACD server state transitions for the current day. The log is in chronological order.

**State Start Time** - The time the agent went into that state.

**Agent state** - The state the agent went into at that particular State Start Time.

**Wrap-up Data** - (if in use this will be displayed)

**Reason Code** - For example Not Ready (Ring no answer), Not Ready (Popped out)

**State Duration** - The amount of time spent in the agent state.
8.3 AGENT DETAIL DISPLAY

The Agent Detail Real Time Display (see above) shows your performance statistics for the current day. This information is refreshed automatically every 10 seconds. This report may be called Agent Statistics, depending on the release of your software.

**Calls presented** The number of calls delivered to your extension (ACD & Non-ACD).

**Calls Handled** The number of inbound calls (ACD & Non-ACD) that are answered by your extension

**Max Talking** The length of the longest call

**Avg Talking** The total time on calls (all talk time + all hold time) divided by the number of calls.

**Total Talking** The total time on calls (all talk time + all hold time)

**Max Ready** The longest time spent on calls

**Avg Ready** The total time spent in the ready state divided by the number of times

**Total Ready** The total time spent in the ready state

**Max After Call Work** The longest time spent in Work Not Ready

**Avg After Call Work** The total time spent in Work Not Ready divided by the number of times spent in those states

**Total After Call Work** The total time spent in the Work Not Ready state

8.4 SKILLS STATISTICS REAL TIME DISPLAY

The Skills Statistics Real Time Display (see Diagram) shows information about how many calls are queued and how long the oldest call has been waiting. This information is refreshed automatically every 30 seconds.
9 CHANGING YOUR PREFERENCES

9.1 SETTING YOUR DESKTOP PREFERENCES

TO SET YOUR DESKTOP PREFERENCES:

Click Preferences on the toolbar.

The Desktop Preferences dialog box opens.

Select the preferences you desire on each tab,

and then click OK.

SETTING THE WINDOW BEHAVIOUR MODE

By default, the Agent Desktop interface is minimised when idle and opens when calls are present (Normal mode). You can change the behaviour mode during the current session using the Preferences tab in the Desktop Preferences dialog box. The window behaviour mode reverts to the global mode set by your administrator after you close Agent Desktop. You must reset the behaviour mode each time you start Agent Desktop if you prefer something other than the globally-set mode.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>Default. The window appears when calls are present and minimizes when idle.</td>
</tr>
<tr>
<td>Keep open</td>
<td>The window remains open when idle.</td>
</tr>
<tr>
<td>Always on top</td>
<td>The windows remains open when idle and on top of all other open applications.</td>
</tr>
<tr>
<td>Stealth</td>
<td>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 message.</td>
</tr>
</tbody>
</table>
9.2 SETTING THE ACCESSIBILITY PREFERENCES

<table>
<thead>
<tr>
<th>STATIONARY TEAM MESSAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOTE: If you use a screen reader with Agent Desktop, scrolling team messages (the default mode) can be difficult to read. You can opt to turn off the scrolling feature and have stationary team messages by clearing the Scroll team messages check box on the Accessibility Options tab. The software will remember your accessibility preferences from session to session, and does not need to be reset each time you start Agent Desktop.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ICON SIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can change the size of the buttons on the toolbar from the default 16 × 16 pixels to 32 × 32 pixels by selecting the Large Toolbar Buttons check box.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AUDIO FEEDBACK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the Audio Feedback on Non-Agent-Initiated Dialogs check box to enable the sounding of a tone when a dialog initiated by other than you appears on your desktop. Examples of such dialogs are new chat windows and notices to you that a supervisor is barging in, intercepting, or recording your call.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CALL DURATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the Enable Call Duration Updates check box to enable the Duration field to increment during a call. By default, this option is enabled. A continually changing field can cause difficulties for screen readers, so agents who are visually impaired might want to disable it.</td>
</tr>
</tbody>
</table>