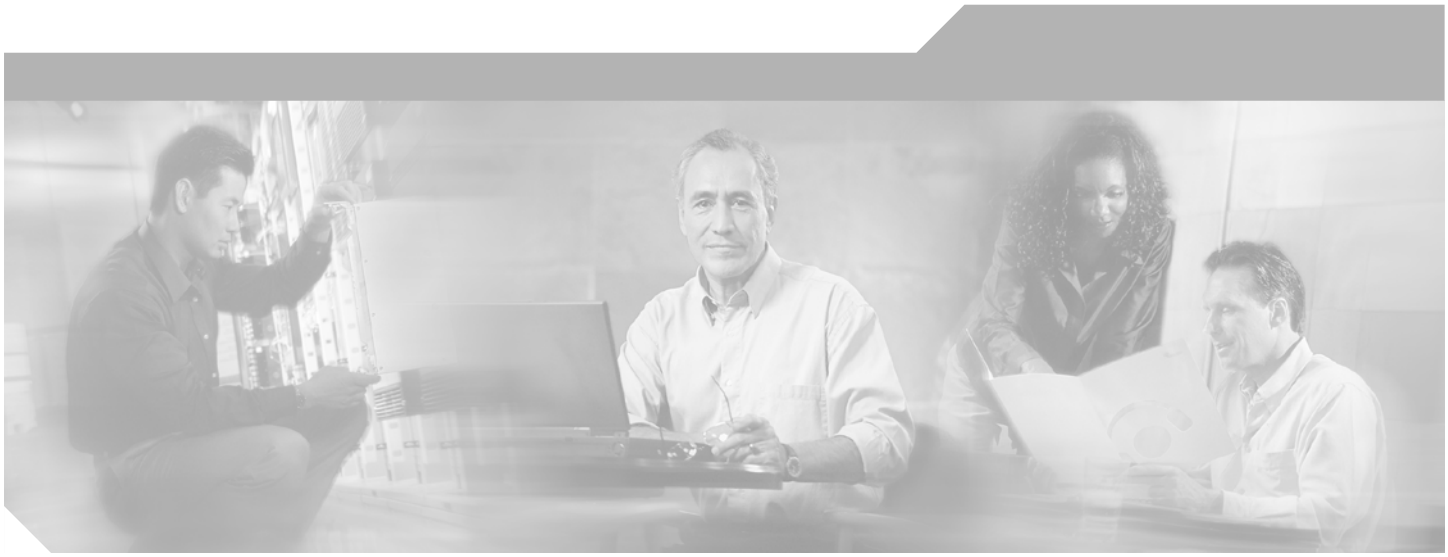

Getting Started

Cisco Desktop Product Suite 4.3 (ICD)

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Contents

Contents

Introduction

1

What is Cisco Desktop Product Suite?

Cisco Desktop Product Suite is a computer telephony integration solution for contact centers that is easy to deploy, configure, and manage. It provides contact center agents and supervisors with powerful tools to increase agent productivity, improve customer satisfaction, and reduce contact center costs.

System Components

The Cisco Desktop Product Suite consists of these major components:

- Desktop Administrator
- Agent Desktop
- IP Phone Agent (IP phone service)
- Supervisor Desktop
- Servers

NOTE: The following descriptions apply to the functionality available in the Enhanced Bundle. Not all of these features are available in the Standard Bundle. See "Product Bundles" on page 1-4 for more information on the differences between the Standard and Enhanced Bundles.

Desktop Administrator

Desktop Administrator provides centralized administration to define work flow and the look and feel of the agent's desktop. It allows fast and easy setup and changes to CTI services because it requires no low-level coding. An administrator, not a programmer, uses keystroke macros to build screen pop actions and simple clicks to design the look and feel of the agent's toolbar. Desktop Administrator's client-server architecture supports remote administration from a single PC. It also supports multiple administrators, each responsible for different groups.

Agent Desktop

Agent Desktop pops screens on the agent PC when a call arrives, increasing the speed of call processing. Agent Desktop populates any sort of third-party application (databases, help desk packages, personal information managers, etc.) based on the calling number, called number, or information that a VRU collects. The screen pop can use a combination of elements.

The Agent Desktop **soft phone** allows agents to control calls from the PC. It minimizes keystrokes and saves time for agents working simultaneously with the phone, CTI desktop, and third-party applications. The soft phone **toolbar** automates common telephony functions, including answer, drop, and speed dial. The toolbar also includes a **taskbar**, which launches applications based on telephony or data events. Agents select from up to 10 predefined task buttons to update customer relationship management (CRM) data and other applications, as well as initiate automated after-call tasks, such as sending an email or fax, or initiating call-handling scripts or other Windows-based tools.

The soft phone also features a **phone directory**, which enables agents to manage contact numbers on their desktop, both globally and by group. The agent initiates dialing from a directory listing, which increases accuracy and saves time. The soft phone **call log** tracks and displays up to seven days' worth of agent call activity to the desktop. The agent can sort the call log based on user-defined parameters, such as call in/out, call duration, or number calling. All call log data can be exported for future use. Call log capabilities help contact center managers analyze call traffic to measure agent productivity and make staffing or work flow changes.

Call/Chat allows agents and supervisors to communicate in writing or "chat" during a call. Chatting allows and agent to confer with another agent during a conference call or with a supervisor for assistance at any time without leaving their desks or putting a caller on hold.

Supervisor Desktop

Supervisor Desktop allows contact center supervisors to view and direct agent activity in real time. Without leaving their desks, supervisors can observe, coach, and communicate with agents in writing, view agent status details, as well as view conference information. Without the caller's knowledge, supervisors can initiate "chat" sessions to coach agents on how to handle customer issues. Marquee message, instant broadcast messages to all agents or teams of agents, enable supervisors to impact agent activities in general.

Supervisors can also use the real-time audio monitoring capabilities to listen to agent conversations with customers. If necessary, they can "barge-in" to calls—conference themselves into the conversation—or "intercept" a call—transfer a call to themselves.

Remote Supervisor Desktop enables a supervisor to monitor agents outside of the local contact center but not to intervene in any way. It does not include barge-in, intercept, recording, or the ability to change agent states.

Servers

The Cisco Desktop Product Suite includes these servers:

- **Call/Chat Server.** The Call/Chat server handles the communication between supervisor and agents (marquee messages and chat) and among agents (chat). It also enables the supervisor's intercept and barge-in actions, the supervisor's ability to change an agent's states, and the supervisor's and agent's ability to start recording a call.
- **Enterprise Server.** The Enterprise server tracks a call over its life and maintains a list of call information. The Enterprise server makes this information available to Agent Desktop in screen pops, and can also allow Agent Desktop to update it.
- **Directory Services Server.** The Directory Services server maintains the agent and supervisor profiles.
- **Directory Services Sync Server.** The Directory Services Sync server ensures that the Directory Services database stays in sync with the ICM database, so that agent, supervisor, team, and skill group information is up to date.
- **IP Phone Agent Server.** The IP Phone Agent server enables IP phone agents to log in and out, change agent state, and enter wrapup data and reason codes without having the Agent Desktop software.
- **Recording and Statistics Server**. The Recording and Statistics server works with the Voice-Over IP Monitor server to record conversations. It also stores a detailed account of agent activity, including times and durations of calls and changes in agents' ACD states.
- **Voice-Over IP Monitor Server.** The Voice-Over IP Monitor server captures a call's voice packets. If the supervisor decides to monitor a call, it directs an instance of the voice conversation to the supervisor's PC. If a supervisor or agent decides to record a call, it assembles the digitized speech from the voice packets into a file and stores it.

Product Bundles

Cisco Desktop Product Suite 4.3 offers two different bundles, the Standard Bundle and the Enhanced Bundle.

The Enhanced Bundle offers the full range of functionality described in the section "What is Cisco Desktop Product Suite?" on page 1-1.

The Standard Bundle offers the same basic functionality, with these exceptions:

- **Agent Desktop.** No task buttons enabled (no work flow automation).
- **Supervisor Desktop**. No call monitoring, recording, barge-in, or intercept.
- **Desktop Administrator.** No work flow automation or Agent Desktop interface customization.

The Cisco Desktop Product Suite 4.3 documentation describes the full functionality offered by the Enhanced Bundle.

Using Cisco Desktop Applications

Starting a Cisco Desktop Application

To start any of the Cisco Desktop components, follow these steps:

- Click **Start > Programs > Cisco > Desktop**, and then click the application you wish to use.

Getting Help

Documentation

The Cisco Desktop Product Suite comes with documents that include the following:

- *Getting Started*, an introduction to the Cisco Desktop Product Suite;
- *Installation Guide*, an in-depth guide to installing and removing Cisco Desktop applications;
- *Administration Guide*, an in-depth guide to administering Cisco Desktop applications;
- *Service Information*, which includes all reference information, such as release notes, technical package information, logs and error codes, and troubleshooting.
- *Agent Desktop, Supervisor Desktop*, and *IP Phone Agent User Guides*, which contain instructions for using those applications.
- *Agent Desktop Quick Reference Guide* and *Supervisor Desktop Quick Reference Guide*, which are handy summaries of the most common tasks in the applications;
- *Agent Desktop Installation Quick Reference Guide*, which contains instructions for installing Cisco Agent Desktop.

These documents are supplied in PDF format and require Adobe Acrobat Reader v4.0 or greater (free download from www.adobe.com) to read them.

Online Help

Online help is available in each application, either through the Help menu, or as context-sensitive help. Press F1 from any screen to display the online help for that window.

System Overview

2

A Typical Call

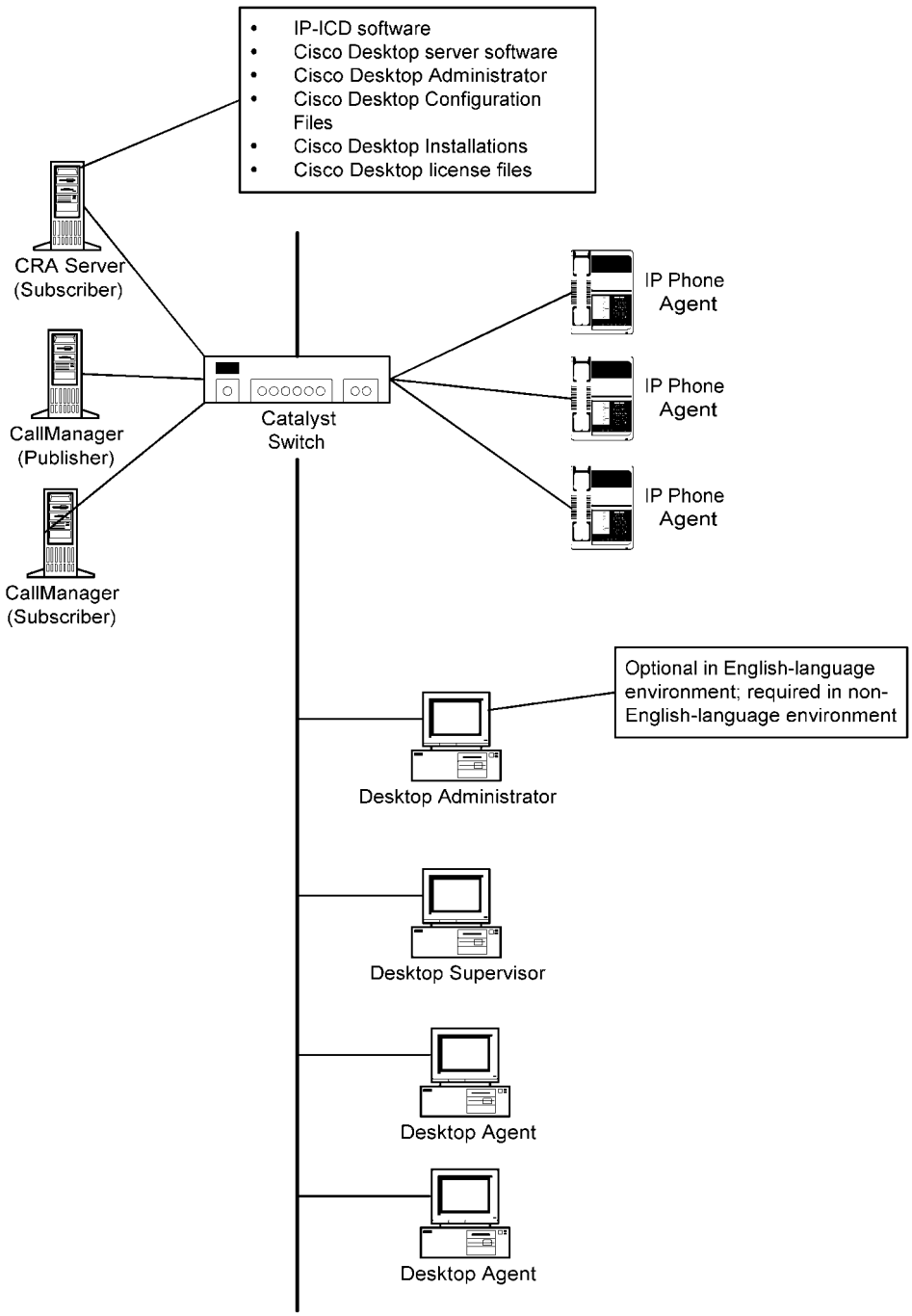
Cisco Desktop typically operates in this pattern:

1. The customer dials the contact center.
2. Based on the dialed number, the public switched telephone network directs the call to the voice gateway for the Integrated Contact Distribution (ICD).
3. The gateway notifies the CallManager that the call has arrived, and then passes the call information and the extension of the CTI route point to which the CallManager should place the call.
4. The CallManager negotiates a connection for the call between the gateway and the IP ICD.
5. The IP ICD starts the call flow configured for the dialed CTI route point.
6. The call flow collects any data needed for routing from the caller and determines the Contact Service Queue(s) that should handle the call. If it finds that no agents are available, it queues the call and provides the specified service in queue.
7. When an agent becomes available for the call, the IP ICD interrupts the current step and requests the CallManager to negotiate the transfer to the agent's telephone.
8. The call connects to the agent's telephone. At the same time, the CTI server notifies the Agent Desktop application on the agent's PC that the call has gone to the agent's telephone. Agent Desktop then pops a screen on the agent PC.

System Schematic

Figure 2-1 shows a schematic of the Cisco Desktop environment.

Figure 2-1. Cisco Desktop environment.



Quick Start

3

Automating the Contact Center

Planning is the key to successfully implementing Cisco Desktop in your contact center. Before you begin using Desktop Administrator, give careful thought to these three areas:

- Work flow groups
- Appearance and function of the Agent Desktop interface
- Screen pops and other work flow automation sequences

Work Flow Groups

Rather than requiring you to administer each agent individually, Cisco Desktop allows you to administer agents by "work flow groups." A work flow group is a grouping of agents that have common requirements for the Agent Desktop interface, screen pop, and other work flow automation.

Although your work flow groups may correspond to your teams or skill groups, they exist independently of the teams and skill groups in Cisco Desktop and can differ from them. For instance, agents on two different teams may be in the same work flow group.

Review the sections, "The Agent Desktop Interface" and "Screen Pop and Other Work Flow Automation Sequences" below, then draw up a list of the groups that have common Agent Desktop interface and work flow automation needs.

The Agent Desktop Interface

Desktop Administrator allows you to:

- determine which telephone and agent action buttons appear on the Agent Desktop interface.
- customize the button icons.
- create custom buttons to automate actions unique to your contact center.

In addition, you can choose when the Agent Desktop interface appears on the agent's desktop.

See Chapter 3 in the *Cisco Desktop Product Suite 4.3 Administration Guide* to understand how to customize Agent Desktop, and then consider the following questions:

- When should Agent Desktop appear? Only when a call arrives? All the time? Only if the agent maximizes it?
- What standard phone actions should the agent be able to perform using Agent Desktop?
- What standard agent state changes should the agent be able to make using Agent Desktop?
- Are there any routine desktop activities where agents would be more efficient if they could start them with the click of a button? Examples might be to start recording a call, notify a supervisor of the need for assistance, or to initiate an email at the close of a call.

Screen Pops and Other Work Flow Automation

Cisco Desktop provides work flow automation in three ways, by executing:

- keystroke macros (scripts created with Desktop Administrator's macro editor that automatically perform sequences of actions)
- applications and passing call information to them as command line parameters
- telephony or agent state change actions

Consider the types of work flow automation that might raise your agents' productivity. For example, when considering a screen pop, ask the questions:

- When should the screen pop? On ringing, because an agent is always finished on one call before the next call arrives? On answer, because sometimes the agent finishes one call while the next call is ringing? At a time the agent determines, because agents occasionally complete entries for the previous call while they greet the current caller?
- What determines which screen is popped? The DNIS value? The presence or absence of account number information? The menu choice a caller made in the automated attendant?
- What information is necessary to make the screen pop, and what is the keystroke sequence involved?

Opportunities for work flow are not limited to screen pop. You might have situations in which agents:

- dial numbers from a database
- always send a follow-up email or letter for certain types of calls
- routinely copy items of information from one application to another
- transfer calls to or conference in agents from another group

Review the tutorials in the Chapter 6 of the *Administrative Guide* to gain a sense of the work flow automation administration and its possibilities.