

Cisco Agent Desktop (CAD) Quick Guide

User Name:	(case sensitive)
Extension Number:	

Opening Program

- To open CAD, double click on the “Agent” icon found on your desktop
- OR
- Go to the Start Button and choose **All Programs > Cisco > Desktop >Agent**

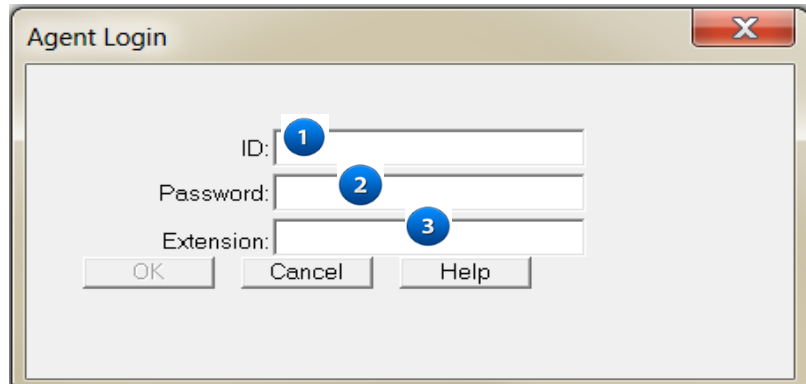


The “Agent Login” dialog box will open.

How to Login

When you login, you must enter the following information:

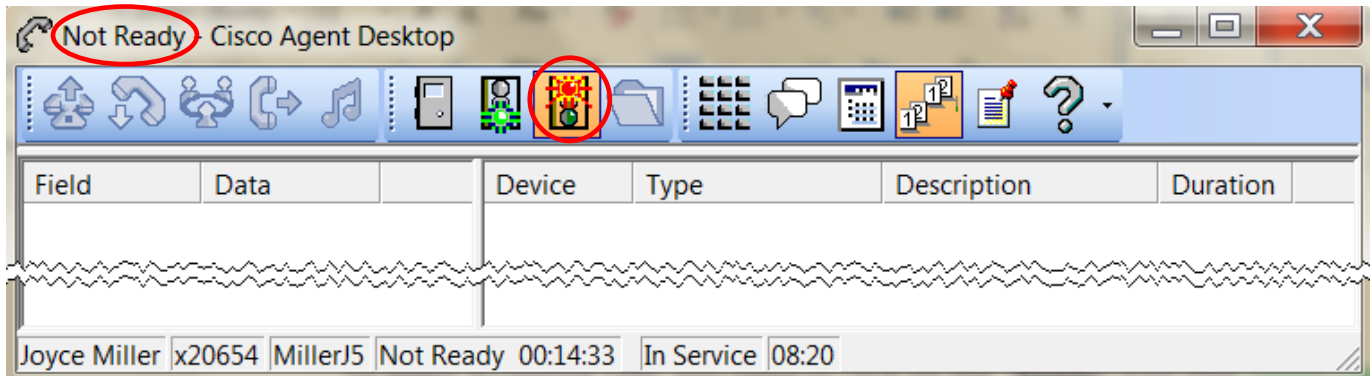
- 1 ID:** This is your network username. It is *case-sensitive* and must be entered in the correct format provided by ITS HelpDesk or other ITS personnel.
- 2 Password:** This is your network password.
- 3 Extension:** This will be provided to you prior to logging in the first time.



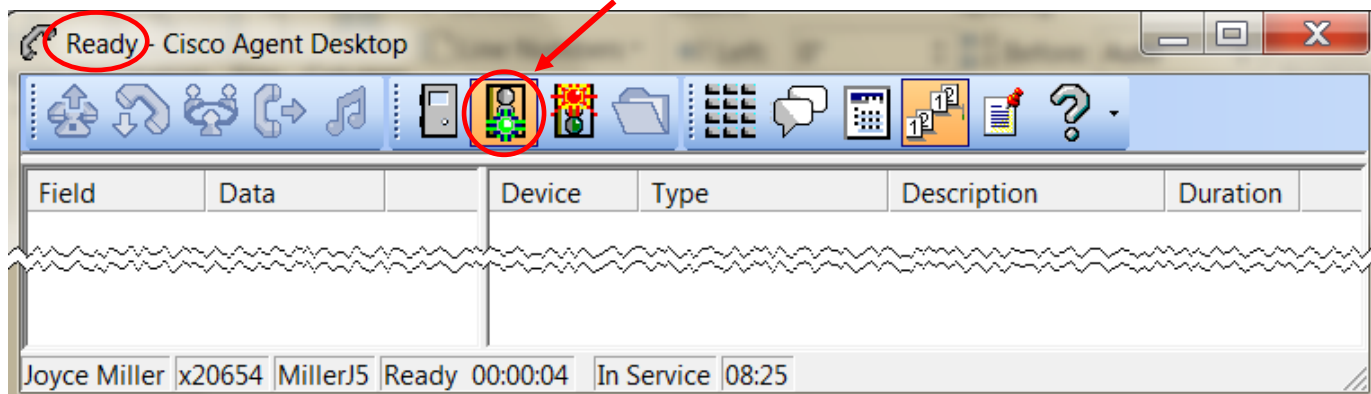
Click the “OK” button to login.

Getting Started

The Cisco Agent Desktop will open. By default, you will be in the “Not Ready” status.



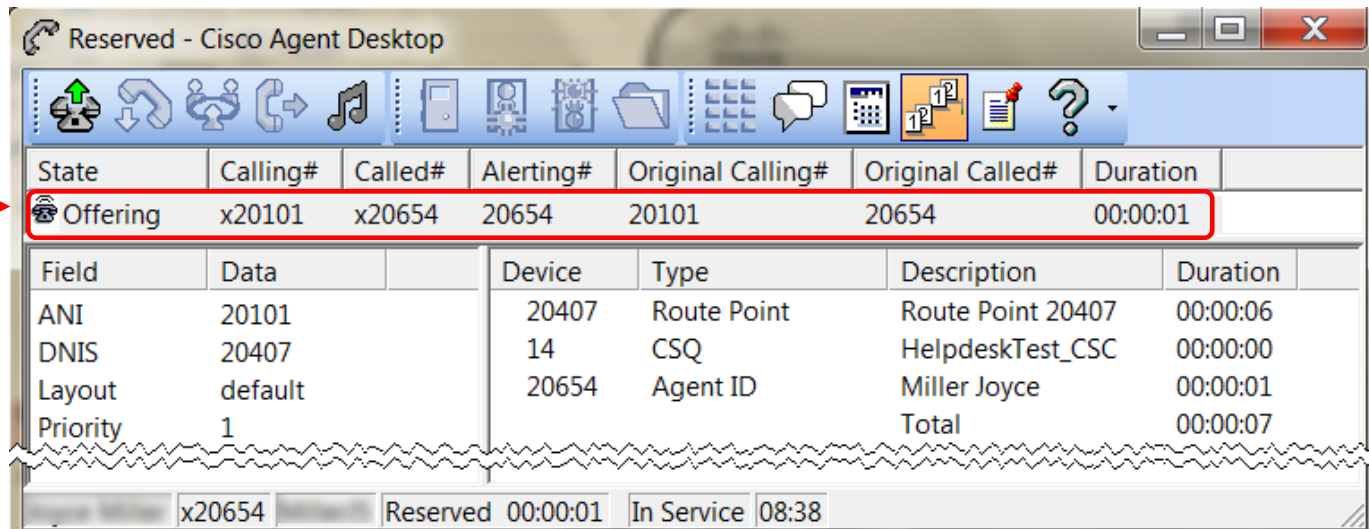
To begin accepting calls, you need to click on the “Ready” icon (the **Green Light**).



You are now ready to receive calls. You can answer incoming calls by using your Cisco phone, along with putting the calls on hold, transferring them and creating a conference call.

Incoming Call

An incoming call looks like this:



The screenshot shows the Cisco Agent Desktop interface with a call in the 'Offering' state. A red arrow points to the 'Offering' icon in the top toolbar. The call details table is as follows:

State	Calling#	Called#	Alerting#	Original Calling#	Original Called#	Duration
Offering	x20101	x20654	20654	20101	20654	00:00:01

Field	Data	Device	Type	Description	Duration
ANI	20101	20407	Route Point	Route Point 20407	00:00:06
DNIS	20407	14	CSQ	HelpdeskTest_CSC	00:00:00
Layout	default	20654	Agent ID	Miller Joyce	00:00:01
Priority	1			Total	00:00:07

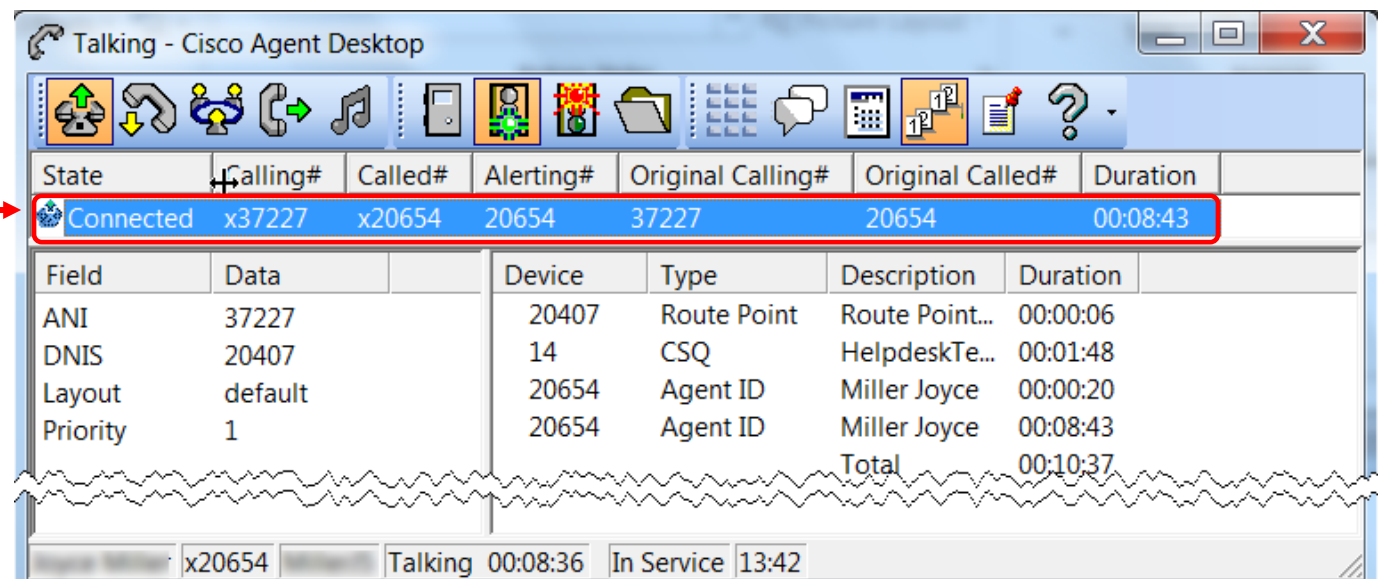
At the bottom, the status bar shows: x20654 Reserved 00:00:01 In Service 08:38

Answering an Incoming Call

To answer the call, click on the “Answer/Drop” icon.



Your call is now be connected...



The screenshot shows the Cisco Agent Desktop interface with a call in the 'Connected' state. A red arrow points to the 'Connected' icon in the top toolbar. The call details table is as follows:

State	Calling#	Called#	Alerting#	Original Calling#	Original Called#	Duration
Connected	x37227	x20654	20654	37227	20654	00:08:43

Field	Data	Device	Type	Description	Duration
ANI	37227	20407	Route Point	Route Point...	00:00:06
DNIS	20407	14	CSQ	HelpdeskTe...	00:01:48
Layout	default	20654	Agent ID	Miller Joyce	00:00:20
Priority	1	20654	Agent ID	Miller Joyce	00:08:43
				Total	00:10:37

At the bottom, the status bar shows: x20654 Talking 00:08:36 In Service 13:42




Ending a Call

When you are done with the current call, click on the “Answer/Drop” icon to disconnect from that call. You are now ready to connect to another call.




Other Selection Buttons

You can also place a call on hold, create a conference call and transfer a call within Cisco Agent Desktop. However, these options are also available via your Cisco phone and/or Cisco IP Communicator.

Icon	Action
	Hold/Unhold Call
	Conference Call
	Transfer Call


Transferring a Call

With a call active, click “Transfer” . The “Transfer a Call” window opens.
Enter the phone number in the Name:Number field, then click “Dial”
Complete one of the following items:

For a blind transfer, click “Transfer” when the phone starts to ring.

For a consulted transfer, wait for the phone to be answered, then click “Transfer.”

Conferencing a Call

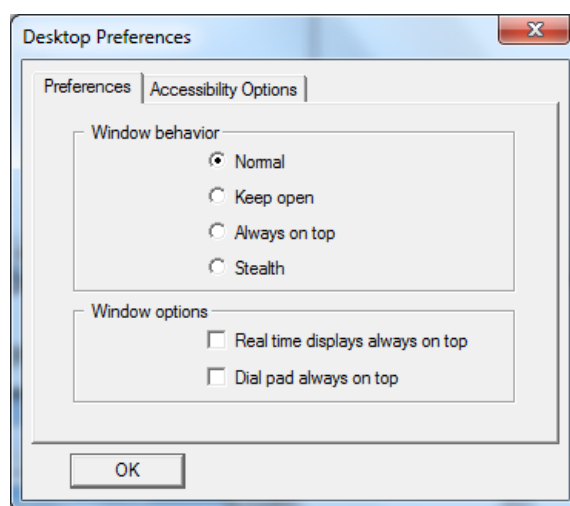
With a call active, click “Conference Call” . The “Conference a Call” window opens.
Enter the phone number in the Name:Number field, then click “Dial”
Wait for the phone to be answered. Click “Add to Conf.:”
Repeat above steps until you have added all parties to the conference.

Preferences

If your administrator configures your toolbar so that you have access to the Preferences button, you can change your Agent Desktop window behavior and accessibility options.

To set your desktop preferences:

1. Click Preferences on the toolbar. The Desktop Preferences dialog box appears.
2. Select the preferences you desire on each tab, and then click OK.



Window Behavior

Option	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. Note: When you select this behavior, you cannot select the Real time displays and Dial pad always on top options.
Stealth	The window appears as an icon in the system tray (lower right corner of your desktop, next to the system clock) and does not appear unless you double-click it or if you receive a team message or an e-mail.

Window Options

Option	Description
Real time displays always on top*	The Agent Real Time Displays window remains open when idle and on top of all other open applications.
Dial pad always on top*	The Dial Pad window remains open when idle and on top of all other open applications.

* If both real time displays and dial pad options are selected to be always on top, the most recently selected window will be on top.

Accessibility Options

The Accessibility Options tab enables you to control how certain aspects of Agent Desktop appear to you.

Option	Description
Scroll Team Messages	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. Your selected team message behavior will persist from session to session, and does not need to be reset each time you start Agent Desktop.
Large Toolbar Buttons	You can change the size of the buttons on the toolbar from the default 16 × 16 pixels to 32 × 32 pixels by selecting this check box. If all of the large buttons do not fit on one row, they automatically wrap to another row.
Audio Feedback on Non-Agent-Initiated Dialogs	Select this check box to enable the sounding of a tone when a dialog initiated by someone other than you appears on your desktop. Examples of such dialogs are new chat windows and notifications that a supervisor is barging in, intercepting, recording, or monitoring your call.
Accessible Call Duration Updates	Select this check box to prevent screen readers such as JAWS from reading the Duration field in the call contact appearance pane. This ensures that screen readers do not continually read off the duration as it increments.
Focus on Team Messages	Select this check box to enable Agent Desktop to switch focus to the team message pane whenever a team message appears. This allows visually-impaired agents' screen readers to read the incoming team message.
Change Report Font Size To	Select this check box and enter a point size in the field to make the fonts bigger or smaller in the real time displays. You can choose a font size between 15 points and 72 points. The default size is 15 points. Note: If you change your font size using the display settings in Windows Control Panel, you must restart Agent Desktop for those changes to take effect.

