

# Agent Desktop

Bring the power of the LAN to NEC's UC for Business. Agents can handle not only multiple phone calls, but also emails, faxes, web chats and callback requests – all from their Agent Desktop application.



## Introduction

With Agent Desktop, contact center managers are able to view real-time information on queue and agent performance.

This information can be viewed across many PCs on the LAN. The benefits of distributing this information across the LAN are significant. Experience has shown that an agent's productivity increases when they are able to review each other's performance. This results in agents becoming more accountable to each other, particularly in a team environment.

While Agent Desktop empowers agents through open communication and a sense of ownership, it is also a very powerful management tool. As contact centers become an increasingly integral component of many companies' operations, the need to monitor the performance of individual agents and queues becomes equally important.

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## Overview

### How does Agent Desktop work?

CT Control queues and prioritizes calls to your contact center. Agents can log out or take a break from Agent Desktop. Once CT Control recognizes that an agent is available to take delivery of a call it then routes the call to Agent Desktop.

Agents are delivered calls only when they are ready to deal with them. Agents who are logged out, on a break, or already dealing with calls<sup>1</sup> are not delivered calls. Once a call is delivered, if the agent takes too long to answer, CT Control pulls it back and returns the call to the front of the queue ready for delivery to the next available agent.

Queued calls are displayed in Agent Desktop for the appropriate queue along with the agents logged into that queue and their current status.

Once an agent has finished with a call they can enter wrap-up information that can be reported on.

### Business Drivers

- Real-time statistics of agent and queue status enabling proactive decisions to be made
- Capturing all contact center contacts in one environment and applying skills-based routing allows for centralized handling of all contacts to improve efficiency and cost effectiveness
- Automatic delivery, queuing and reporting of multimedia call types improves response times and has positive effects on customer satisfaction levels
- One solution from one vendor. Agents can answer all methods of customer contacts – phone, email, web callback, web chat and fax using one application. There's no longer a need for different solutions from different vendors
- Lower total cost of ownership via a single communications platform

### Typical Contact Center needs

Typical requirements of a contact center application include:

- Provide supervisors with real-time statistics of agent and queue status so that proactive decisions can be made
- Access to personal and company phonebook directories
- Presence buttons
- Everyone in the contact center to view real-time queue and agent status
- Ability for agents to answer, dial and transfer calls from their phone, keyboard and PC desktop
- View which agents are currently logged in
- How many calls are waiting
- How long the oldest call has been waiting
- The total calls and grade of service percentage for the day by queue
- Current number of abandoned calls for the day
- What type of call an agent is on
- What mode the queue is in e.g. day or night service
- Provide single point of management for all media types

### Agent Desktop Presence and Voice Messaging

This brochure covers the contact center and some call handling capability of Agent Desktop. Agent Desktop also includes rich presence, and can be combined with Executive Desktop to provide fully integrated voice messaging visibility and management for mailbox users, including recording conversations to mailbox. Executive Desktop is also required for personal fax management when Fax Messaging is used.

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<sup>1</sup> A maximum number of calls can be set, per medium, for each class of agent.

# Key Features and Benefits of Agent Desktop

## Supervisor Features

Agent Desktop provides managers and agents with a clear picture of all contact center activity. It provides managers with easy to use and efficient queue and agent control. The many features of Agent Desktop include:

- Facility to log on/off across all media types, put an agent on a break, and assign worktime after each call
- Real time graphical indication of the status of each Agent and each queue
- Real time graphical indication of how many calls each agent is currently attending to (per media)
- Full supervisor functions, including the ability to change parameters easily
- View status of agent's extensions e.g. inbound queue call, outbound call
- Real-time statistics on a per-agent basis via a tool tip
- Occupancy percentage for each agent
- Current service levels achieved (per media)
- Change the queue mode, e.g., for unattended or after hours answering
- Create different break types by agent
- Alert agents and supervisors when there are no agents logged in, calls waiting too long or too many calls in the queue
- Supervisors can easily make themselves available to take delivery of specific media
- Calls can be delivered to certain agents/supervisors on an "On Demand" basis only (calls are delivered when the Demand button is clicked)
- Supervisors can monitor (listen to) an agent's phone call and then intrude if necessary. This feature is governed by security.

## Supervisor Benefits

Organizations can gain a number of significant benefits from the introduction of UCB's Agent Desktop application, such as the ability to view all media types in one environment.

- Agent Desktop is easily networked, giving all staff access and encouraging team members to be more pro-active in handling calls
- As screen pops can be customized to behave exactly how the agent wishes, customer service is improved by having all the caller's details at the agent's disposal as calls are answered
- The cost per seat is reduced as agents can use analog phones, as Agent Desktop provides an advanced GUI interface
- Supervisors can see what is happening as it occurs and can react immediately, managing their agents more effectively across all media types
- Supervisors are able to log agents in/out or put them on a break from their PC
- Live agent occupancy percentages assist supervisors to manage their agent's time more easily resulting in less burn out
- The ability to change the mode of the queue from Agent Desktop means that contact center managers can react to a situation immediately e.g. put a queue into emergency mode
- Performance standards for queues and agents can be set and assessed on an ongoing basis and across all media types. This saves hours in management analysis and is probably the most important tool in the system for a company to correctly view the contact center operation and to estimate future growth patterns
- Demand delivery allows supervisors and managers to provide support to the contact center when they feel it is necessary, without having calls automatically delivered to them like agents
- The ability for an agent to request alert assistance means high load contact centers are able to maximize the use of roaming supervisors and potentially increases agent

availability as agents do not need to leave their desks (and therefore take breaks) to request assistance

With the power of Desktop's toolbar at their fingertips, agents can effectively manage incoming calls and multimedia requests from their PC terminal. The key features of Agent Desktop for individual agents include:

## Agent Features

- Phone functionality such as make call, hang-up, transfer, conference, hold, park and forward via an easy to use toolbar.
- Agents can initiate or schedule a conference call for up to 64 parties – either before a call begins or during a conversation. Informative screen-pop information such as CLID, queue name, wait time and caller's name presented to the agent when the call is delivered (on a per media basis), including the ability to screen-pop Microsoft® Outlook® contacts.
- Multi-line capabilities that allow the viewing and handling of concurrent phone calls.
- The ability to handle concurrent multimedia contacts.
- Desk-to-Desk chat that enables internal users to communicate via text messaging Desktop-to-Desktop. Users can save a Chat call transcript so they may access it later.
- Self-paced online tutorials from either startup of the application or from online help.
- Make, take and transfer calls using global or personal dialing directory.
- Agents can view their own performance statistics.
- Ability to ask for after call 'Worktime' or take a Break from the queue.
- Code the call type e.g. 'Wrap up codes'
  - Agents can put himself or herself in Alert status if they need assistance
  - Agents can record a conversation between themselves and another party. The recorded conversation shows as a message within a mailbox.
  - Establish and wrap up callback type calls

- Agents can work from any extension or work desk by logging in with their unique Agent ID
- Last called agent information is displayed to agents when calls are delivered. Additionally CT Control can attempt to deliver the call to the last agent who dealt with the caller

## Agent Benefits

- Chat is an excellent medium to exchange complicated information quickly and in real time and for coaching i.e. a supervisor can monitor an agent's call and send coaching texts to that agent's Desktop at the same time.
- Agents can see who they are dealing with and don't have to constantly write down names, phone numbers and email addresses resulting in reduction in talk times as agents no longer have to ask for customer details on every call.
- The ability for an agent to view their own statistics makes them more likely to self manage and become goal oriented.
- Agents won't log out or take a break if there are calls, emails or web requests waiting.
- Agents can log into CT Control from any PC that has Agent Desktop loaded.
- The Break option shows other agents in the contact center why the agent is not logged in.
- The phone book directories provide easier access to frequently called numbers and email addresses both internal and external.
- Wrapup codes automatically screen-pop on the agent's desktop for completion after each call. This means the agents do not have to remember to do this manually.
- Viewing the current queue status will allow all in the contact center to react immediately.
- Ability to view all contact media types in one application.
- The ability to log in from any PC means that agents do not always have to sit at the same desk, and reports are detailed by individual

- agents. This is also very useful for contact centers with different shift times.
- Automatically offering online tutorials at startup raises the awareness that tutorials are available for users so they become more comfortable with features and functions .
  - The ability to be available by selected media offers flexibility and the ability to respond quickly to unexpected call loads.
  - Last called agent increases customer service levels by delivering the caller to the agent who last spoke to them, effectively reducing call handling times and increasing call center efficiency. Agents are able to make more informed decisions about how to handle the caller, resulting in greater .customer satisfaction
  - Multi-line functionality allows agents to view and manage more than one phone line .while ensuring agents are presented with the information required to answer calls in a customer focused, professional manner.

### Agent Desktop Architecture Diagram

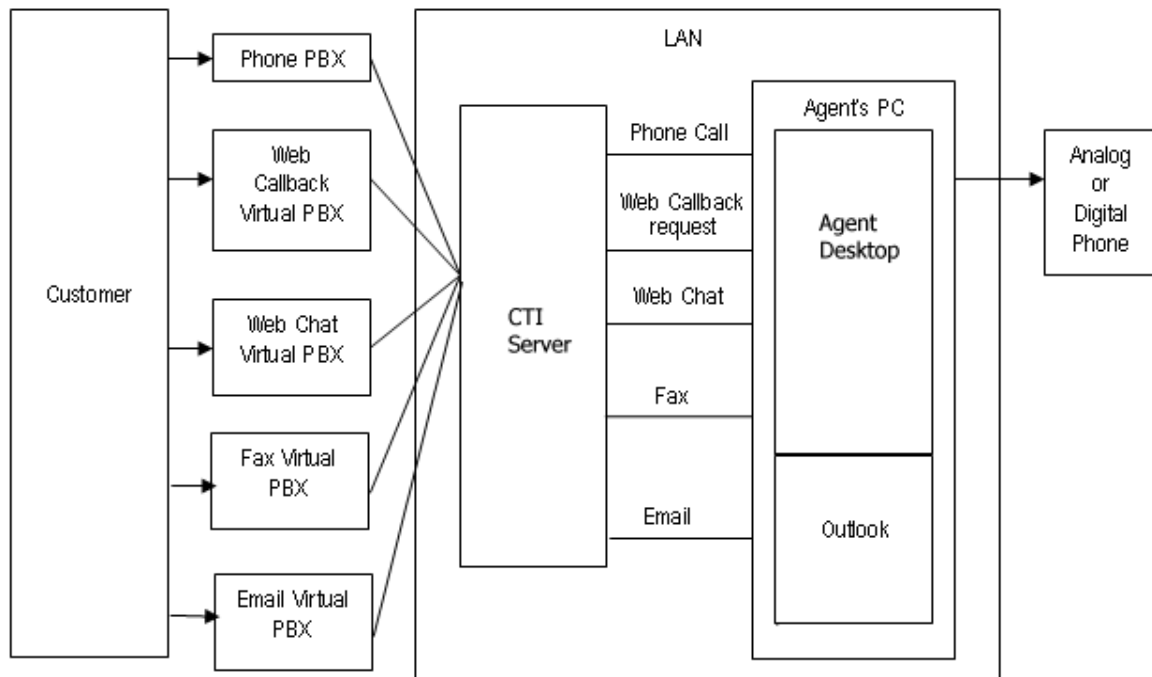


Figure 1. Agent Desktop Architecture

# Examples

## Agent Desktop view showing Queues

- 1 Desktop toolbar with standard call handling options

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- 2 Agent Toolbar

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- 3 Multi-lines – PBX dependent

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- 4 Active Call information

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- 5 Chat view provides Desk-to-Desk chat and/or Web chat plug-in (available with Web Chat module)

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- 6 Queues screen displays selected Queues with Agents and calls waiting listed beneath each queue

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- 7 Hover over an agent to view their current statistics as a tooltip

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- 8 Calls awaiting Wrapup

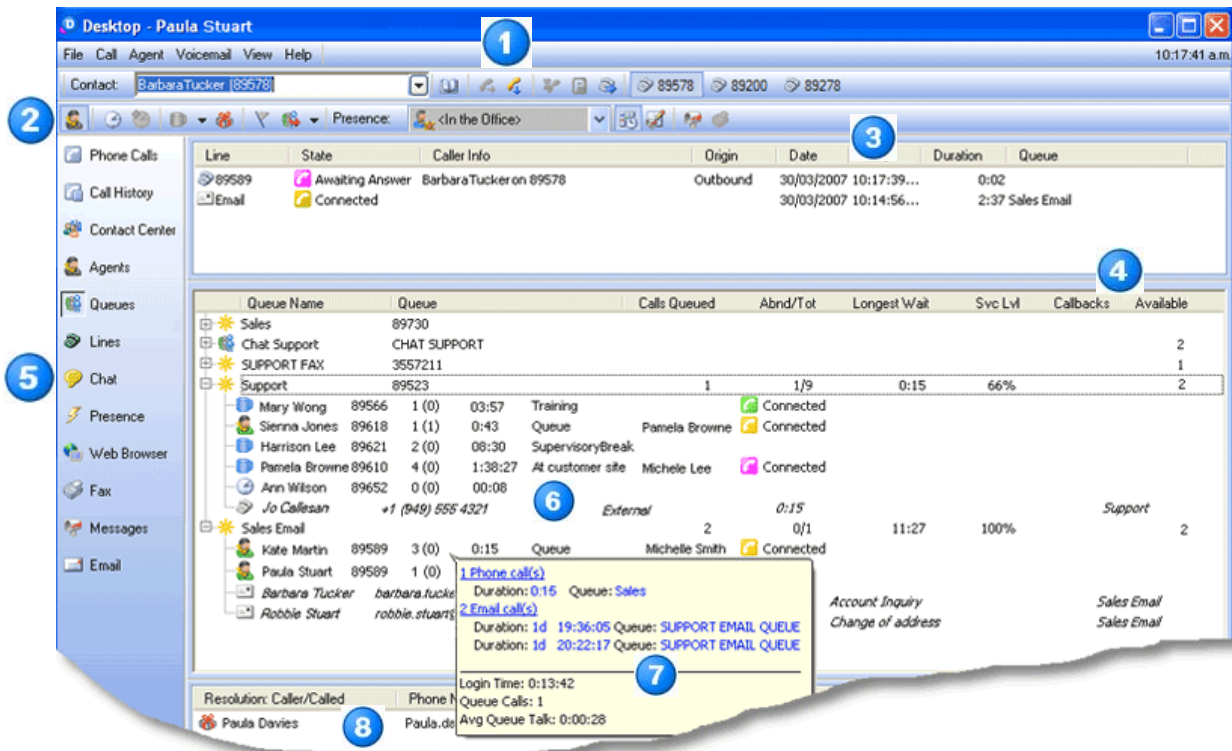


Figure 2. Queues displayed in Agent Desktop

## Online Tutorials

- 1 A dialog displays a list of available tutorials that the user can go through
- 2 Users can choose not to show the tutorial list on startup

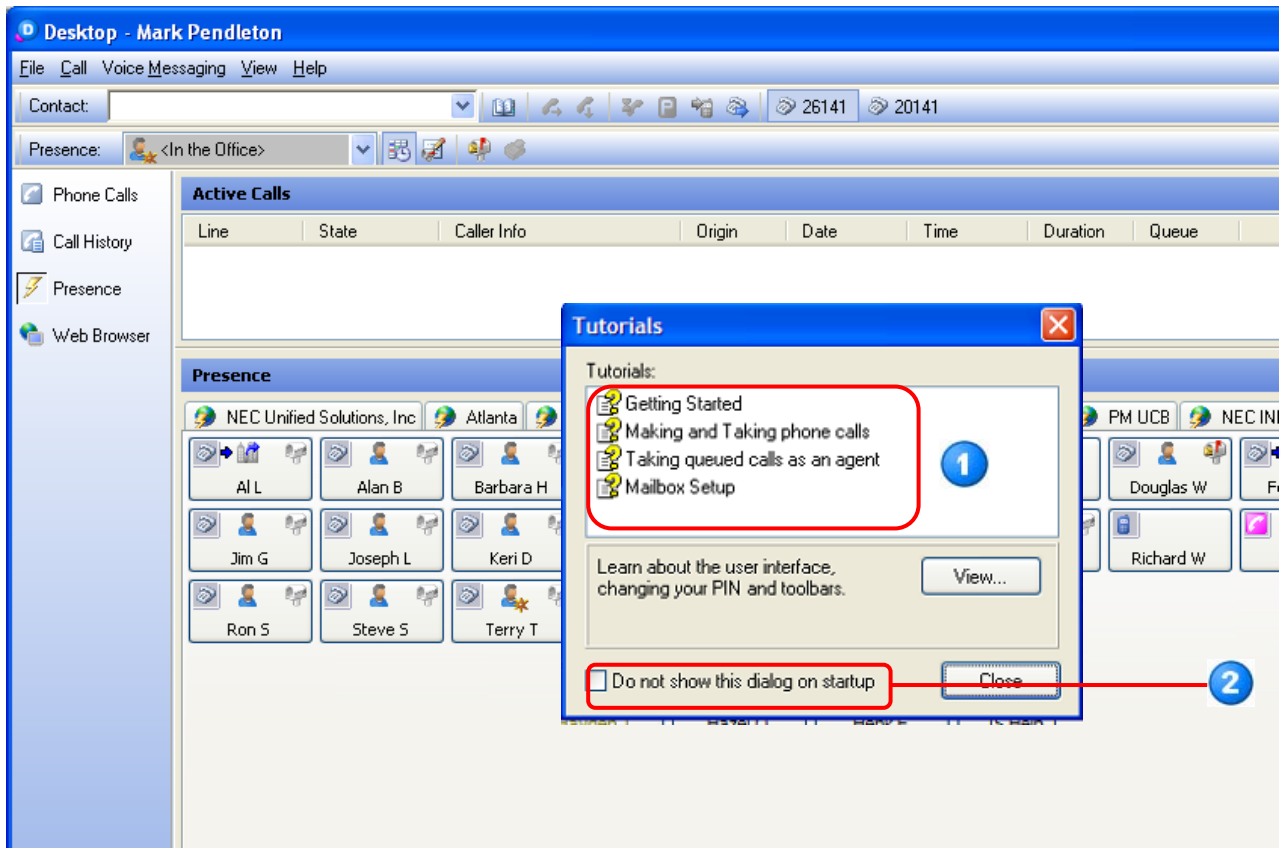


Figure 3. Agent Desktop Tutorials to Get started



- Demand a call while on a break
- An agent can request a call while they are on a break. This means the agent does not have to cancel their break in order to answer a waiting call. At the end of the call the agent will remain in break status

- 1 Agent Barbara is currently on a break, therefore no calls will be automatically delivered
- 2 Right click on any queued call and select "Request this call" to take delivery of that call

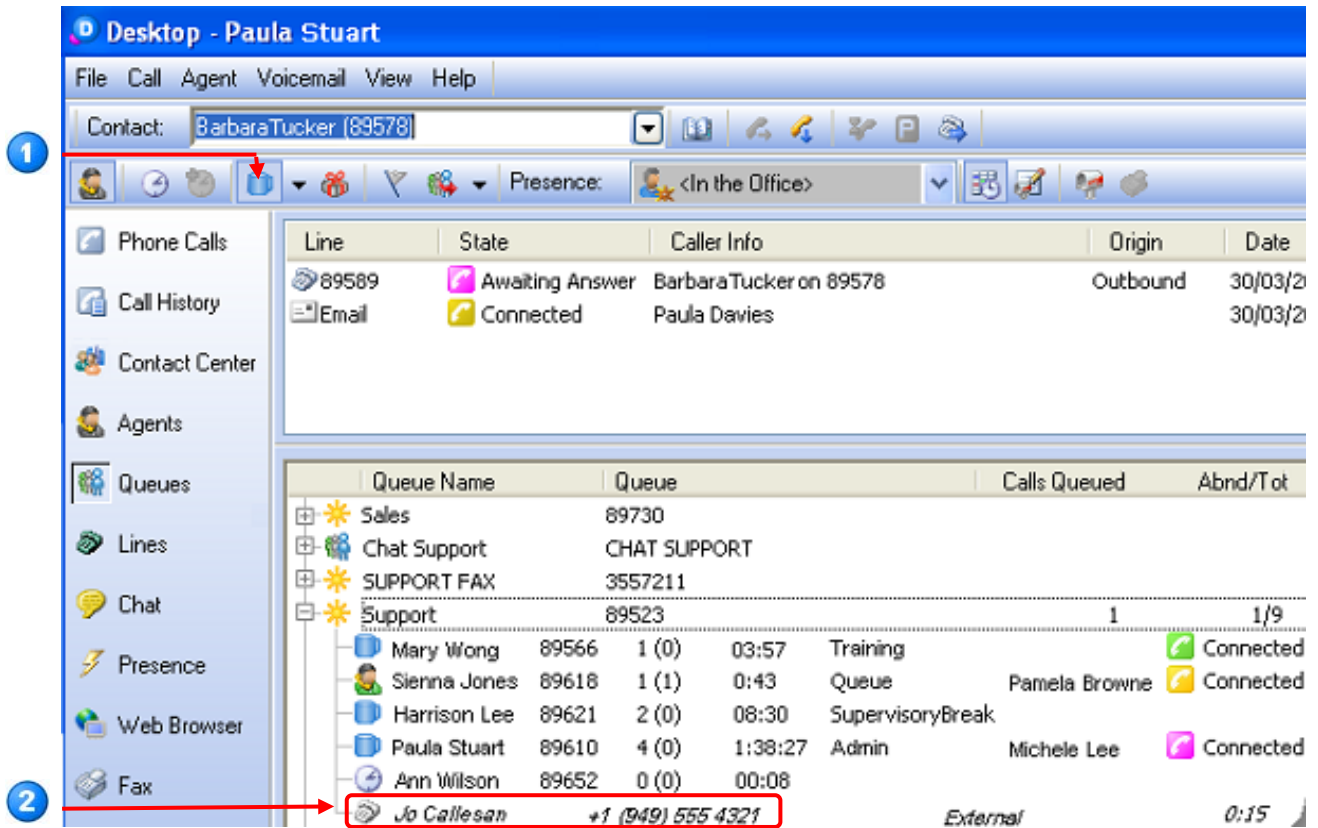


Figure 4. Call waiting in Queue



Figure 5. Manual Request for Delivery is also available for "Demand" Agents

### Typical Call Delivery Screen

Agents are presented with the call delivery screen as soon as a call is presented to them. This example is typical of the screen-pop presented when a queue call is delivered

- 1 The name of the queue this agent is currently taking a call from
- 2 The caller is clearly identified including any information that is noted for that caller
- 3 Last called agent information is optionally displayed to the agent
- 4 The Call Resolution Window displays automatically if a processed call requires a Wrapup code or a Call resolution for flexible wrapup entry, and the wrapup screen pops at the end of the call
- 5 The various 'Call Control' functions available to the agent from Agent Desktop
- 6 The current call duration and how long the caller waited in the queue

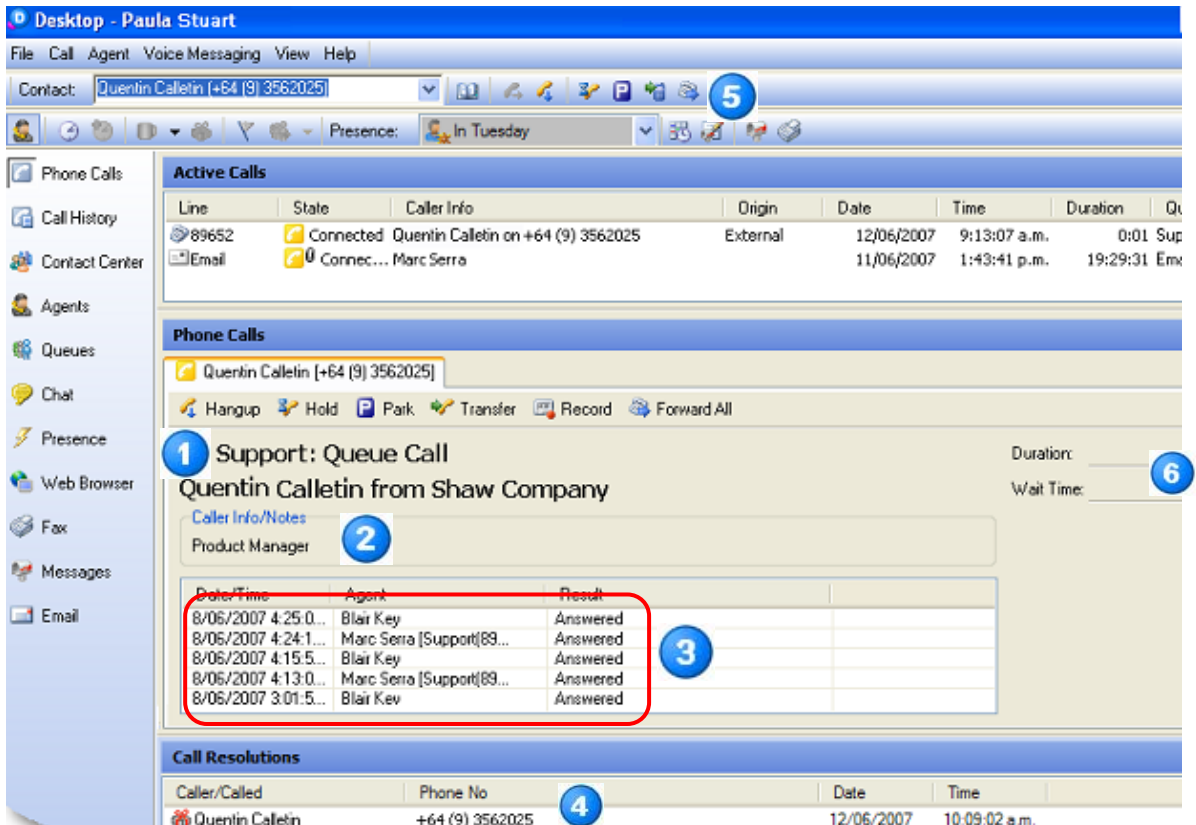


Figure 6. Delivered Queue call with Last Called Agent information

## Agent Status Indicators

Agent Desktop displays a wealth of real time information. Icons are used to convey information about an Agent, queue or call state in a simple, easy recognizable way.

- 1 See the below example for a sample of some of the available agent status indicator icons.

Mary has placed herself in alert status. Supervisors will see Mary's Agent icon change to the red alert flag in the Queues or Agent screen, and Desktop pops with the agent's queue highlighted

Sienna is a prime agent for the queue. Calls are generally answered by prime agents

Harrison is a backup agent for the queue. Backup agents receive calls when prime agents are overloaded

Paula is on a break. Breaks remain in effect until the agent logs back in. The break time counts down from the estimated break time; when this expires, the blue mug turns to red and the time then counts up

Ann is in work time. Agents may receive automatic after-call worktime or request it manually

The screenshot shows the Agent Desktop interface for Paula Stuart. The top menu includes File, Call, Agent, Voicemail, View, and Help. The contact field shows BarbaraTucker [89578]. The presence indicator is set to <In the Office>. The main area displays a table of calls and a queue view. The queue view shows the 'Support' queue (89523) with 1 call queued and 1/9 agents. Agents listed include Mary Wong (Training, Connected), Sienna Jones (Queue, Connected), Harrison Lee (Admin, Connected), Paula Stuart (Admin, Connected), Ann Wilson (0:08), and Jo Callesan (+1 (949) 555 4321, External, 0:15). A blue circle with the number '1' highlights Michele Lee's status.

Line	State	Caller Info	Origin	Date
89589	Awaiting Answer	BarbaraTucker on 89578	Outbound	30/03/20
Email	Connected	Paula Davies		30/03/20

Queue Name	Queue	Calls Queued	Abnd/Tot
Sales	89730		
Chat Support	CHAT SUPPORT		
SUPPORT FAX	3557211		
Support	89523	1	1/9

Agent	Phone No	Queue	Time	Role	Status
Mary Wong	89566	1 (0)	03:57	Training	Connected
Sienna Jones	89618	1 (1)	0:43	Queue	Connected
Harrison Lee	89621	2 (0)	08:30	Admin	Connected
Paula Stuart	89610	4 (0)	1:38:27	Admin	Connected
Ann Wilson	89652	0 (0)	00:08		
Jo Callesan	+1 (949) 555 4321			External	0:15

Figure 7. Agent status shown in Agent Desktop

## Presence – A Personal Presence Page

Presence buttons are used to monitor the status of internal extensions, providing a wealth of information to the Desktop user such as:

- **Extension Phone status** – Idle/Ringing / Off-hook; Inbound / Outbound call
- **Presence Profile status** – In the Office / Out of the Office / On Vacation / In a Meeting
- **Mailbox status** – No messages / New messages / Urgent messages

Armed with this comprehensive information, users can quickly inform callers on the availability of the person they wish to speak to.

- 1 Simply click on the appropriate tab to select another Presence Page.
- 2 The mailbox icon indicates there are one or more waiting messages for Alan. At a glance you can tell that Alex W is out of the office, and Alex Y is in a meeting.
- 3 Andrew is on an outbound call, Angela is logged into the queues and Antony is at his desk.
- 4 You can have Desktop automatically arrange your Presence buttons, or choose exactly where on the Presence page you wish to have the buttons located. For example, you may choose to have common external contacts at the bottom of the same page.

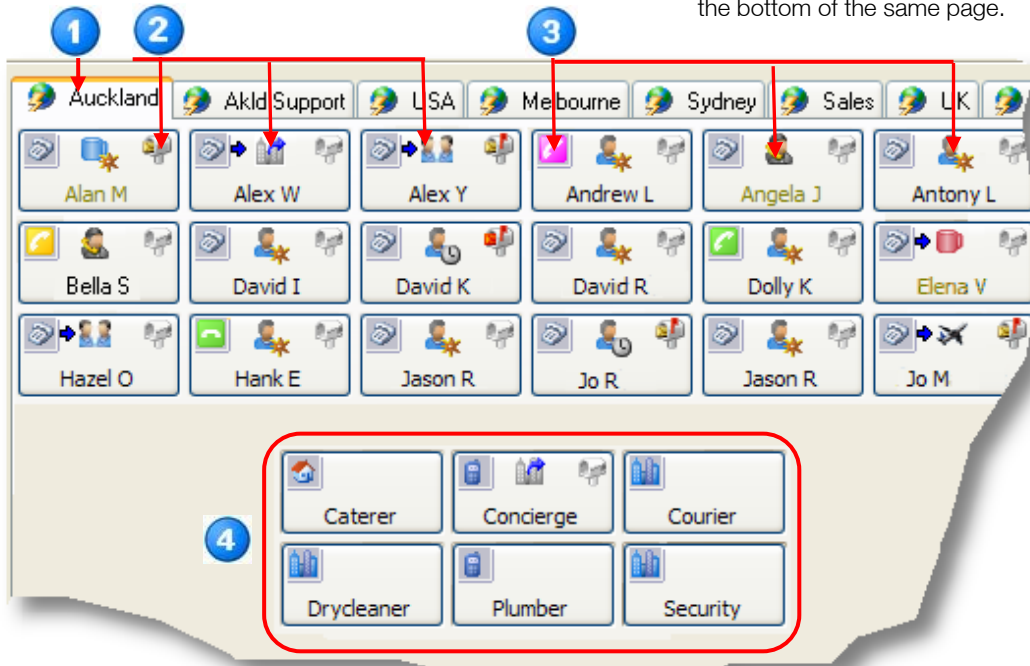


Figure 8. Presence buttons

## Presence Status Indicators

At a glance, you can determine the following details from the above screen:



Alex is out of the office



Alex's phone is forwarded to her mailbox



David K has an urgent voice message



Jason is in the office and at his desk



Jo R is in the office, but away from her desk



Hazel's phone is currently idle



Hank has no messages



Angela is logged in to take queue calls



Jo is in a Meeting



David has at least one message in his mailbox



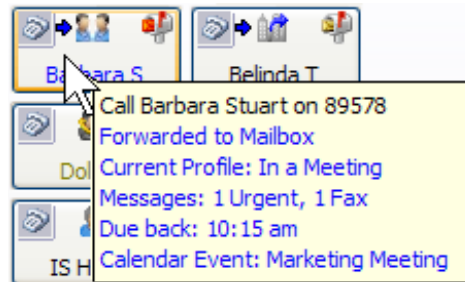
[Green phone] Dolly is on an inbound non-queue call



[Pink phone] Andrew is on an outbound non-queue call

More detailed extension status information is available by mousing over a contact's Presence button. This tooltip information, as shown below, can include this user information:

- Extension 'forward' setting (e.g., Forwarded to Mailbox)
- Current Presence Profile (e.g., In Meeting)
- The number and type of new messages (e.g., Urgent, New, Fax)
- The user's ETR (Estimated time of return) status – for unavailable Presence Profiles
- Name of the Calendar appointment (this can be suppressed)



## Quick Search from the Contact field

Users can make a quick search by entering a name into the Contact field. Desktop will attempt to match the name to a Phonebook contact and, if a match is found, populate the Contact field with the contact's default telephone number

- 1 Click on the contact field arrow to display a list of all available numbers for the contact
- 2 The Phonebook icon

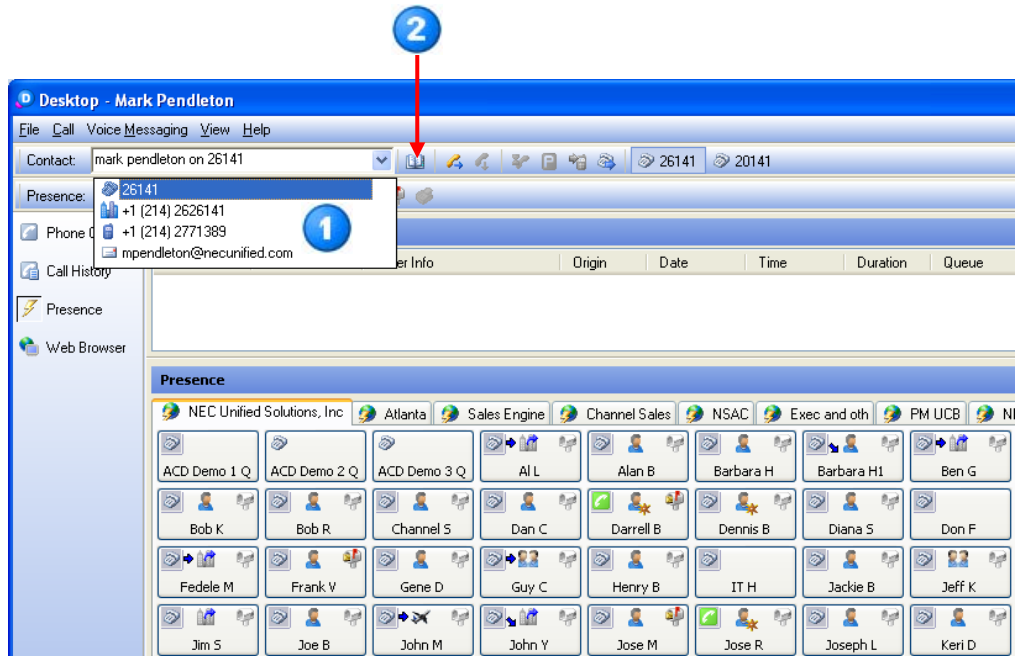



Figure 9. Dial from Contacts

## Phonebook Search

 Clicking the Phonebook button allows users to view, search and edit the Phonebook. Click the Phonebook button to search for a contact

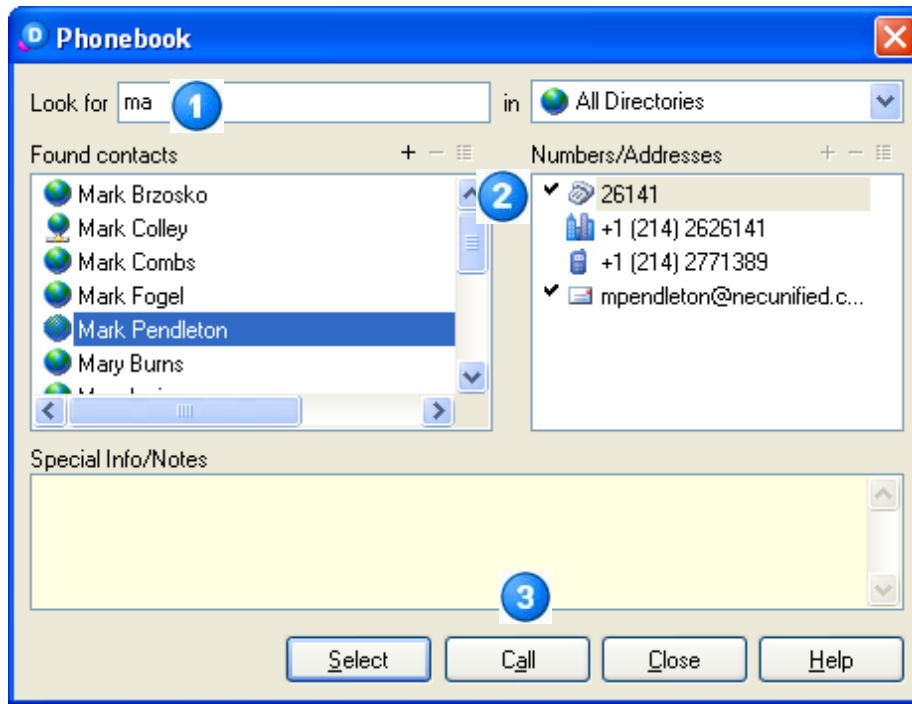


Figure 10. Phonebook Search

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