



Cisco Finesse Desktop Interface

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Finesse Agent Desktop

After you sign in, you can change your status to Ready to make yourself available for calls. The buttons in the call control area change depending on the situation. For example, when you are on a call, Consult, Hold, Keypad, and End buttons are available. When you have a call on hold and are on a consult call, Conference, Transfer, Retrieve, and End buttons are available. When you are on a conference call, buttons for Hold, Consult, Keypad, and End are available.

Finesse provides a separate state control for chat and email. If you handle chat and email contacts, you must change your status to Ready on the Chat and Email Control gadget.

The Finesse agent desktop provides the following out-of-the-box functionality:

- Basic call control: Answer, hold, retrieve, end and make calls.
- Advanced call control: Make a consultation call and transfer or conference the call after the consultation.
- Agent state and call timers: The agent state timer indicates the length of time in Ready or Not Ready state. The call timer indicates total call time, hold time, and wrap-up time.
- Schedule a callback: Schedule a callback for an Outbound Dialer call to call a customer back at a more convenient time.
- Direct Preview Outbound calls: Preview the customer information for the call before you choose to accept, reject, or close the contact.
- Reclassify a Direct Preview Outbound call: If you do not reach the customer, you can reclassify the call as Answering Machine, Fax/Modem, Busy, or Invalid Number.
- Send DTMF digits: Send DTMF digits to interact with an IVR system.

- Not Ready and Sign Out reason codes: Code to indicate why you are changing your status to Not Ready or signing out (your administrator defines these codes).
- Wrap-up reasons: Wrap-up reason for each call (your administrator defines the wrap-up reasons).
- Phonebooks: List of contacts from which you can select one to call (your administrator defines what contacts appear in your phonebook).
- Workflows: Your administrator can define workflows that are triggered by call events (for example, your administrator may create a workflow that causes a browser pop on your desktop when a call arrives).
- Single Sign-On (SSO): An authentication process that allows you to sign in to one application and then securely access other authorized applications without needing to resupply user credentials. It permits Cisco supervisors or agents to sign on only once with a username and password to gain access to all their Cisco browser-based applications and services within a single browser instance.
- Hybrid Mode: An authentication process that allows you to sign in to Finesse Desktop either in SSO or Non SSO mode on a per agent basis.
- Live Data reports
- Web Chat: Accept, interact, and end chat sessions.
- Email: View and reply to customer email messages.
- Language support: If your administrator installed Finesse language packs, when you sign in to Finesse, you can choose from a list of supported languages for the desktop.

The functionality available to you depends on what your administrator has configured. For example, if your administrator did not define wrap-up reasons, you cannot choose a wrap-up reason.



Note To ensure that all features of the Finesse agent desktop work properly, you must disable pop-up blockers.

Finesse Supervisor Desktop

In addition to the same call-control functionality provided by the agent desktop, the supervisor desktop also provides the following:

- Team Performance gadget
- Live Data gadget



Note To ensure all features of the Finesse supervisor desktop work properly, you must disable pop-up blockers.

Team Performance Gadget

On the Team Performance gadget, you can select a team from a list of teams assigned to you. You can view the agents on that team, their current state, the time in state, and their extension. You can click the column headers to sort the information by Agent Name, State, Time in State, or Extension.

The Time in State field refreshes every 10 seconds. When an agent's state changes, the Finesse server sends out an agent state notification and the timer resets to 0. An agent state change includes changing from Not Ready with a reason code to Not Ready with a new reason code.

The Team Performance gadget also provides the following functionality:

- Silent monitoring: Silently monitor an agent call.
- Force state change: Force an agent into Ready or Not Ready state or sign out an agent.

When you silently monitor an agent, a Barge In button appears in the call control area. You can click this button to barge in to a call between the agent and customer. After you barge in, you can choose to intercept the call by dropping the agent.

State and Call Timers

The Finesse desktop provides agent state and call timers.

The agent state timer appears next to the agent state drop-down list when you are in Not Ready or Ready state and updates every second. The format for this timer is mm:ss. If you are in the state for more than one hour, the format changes to hh:mm:ss (for example, 05:25 or 01:10:25).

When you change state (for example, from Not Ready to Ready or from Not Ready with a reason code to Not Ready with a new reason code), the timer resets to 00:00.

Finesse provides a separate state control for chat and email. This state control does not have a timer.

The Finesse desktop provides call timers in the Call Control gadget (in the format mm:ss). The call timers provide the following information:

- Total Call Time: Indicates the duration of your current call.



- Hold Time: Indicates the amount of time that the call has been on hold. When you place a call on hold, this timer shows the hold time, followed by the total call time in parentheses.



- Wrap-Up Time: Indicates the amount of time that you have been in wrap-up state. If wrap-up is enabled for you, you transition to wrap-up state when you end the call.



If the call exceeds 1 hour, the timer still displays in minutes and seconds. For example, at 1 hour and 15 seconds, the timer displays 60:15.



Note

If the Finesse server cannot accurately calculate the state time or the call time (such as under certain failover conditions), the timer displays in the format “- :- -”

For chat contacts, a timer appears in the Manage Chat and Email gadget that indicates the duration of the chat session. For email contacts, a timestamp appears in the Manage Chat and Email gadget that indicates the time that the system received the email contact.

Browser Behavior

If the browser window has a single open tab for the Finesse desktop and is minimized or behind another browser window, then the browser window is restored or brought forward if any of the following occurs:

- A new call arrives on the desktop.
- You are signed out due to failover or inactivity.
- A supervisor signs you out.



Note This behavior is for voice contacts (calls) only. If the browser is minimized or behind another window and a chat or email contact arrives on the desktop, the browser is not restored.

When a chat contact arrives at the desktop, there is an audible alert. When an email contact arrives on the desktop, an orange icon appears on the envelope on the Chat and Email Control gadget.

The behavior of Finesse may differ depending on the browser used. The following table details the behavior of the Finesse desktop for the supported browsers that have a single open tab. This does not apply when multiple tabs are open.

Scenario	Result
Finesse Desktop is minimized.	Internet Explorer and Firefox: Finesse restores back to size and position (on top of other windows).
Finesse Desktop is behind other non-browser windows.	Internet Explorer: Finesse flashes in the task bar. Firefox: Finesse does nothing.
Finesse is behind other browser windows.	Internet Explorer: Finesse flashes in the task bar. Firefox: Finesse comes to the front.



Note If you are using Internet Explorer to access the desktop, this feature works by default. If you use Firefox to access the desktop, perform the following steps for this feature to work.

1. Open the Mozilla Firefox browser and enter the following in the address bar:
about:config
2. If a warning page appears that states this might void your warranty, click **I'll be careful, I promise**.
3. In the Search field, enter **dom.disable_window_flip**.
4. Double-click **dom.disable_window_flip** to set the value to **false**.

Browser Refresh

If you refresh the browser when handling chat contacts:

- Active contacts are marked as handled and live data is updated.

- Allocated contacts are requeued and live data is updated.
- Historical data is updated after some time.
- Finesse desktop automatically signs you in.

If you refresh the browser when handling email contacts, all email sessions are requeued.

Browser Settings for Internet Explorer

If Internet Explorer is used to access the Finesse desktop, certain settings must be configured in the browser to ensure all features of Finesse work properly.

Disable pop-up blockers.

Configure the following privacy and advanced settings:

1. From the browser menu, select **Tools > Internet Options**.
2. Click the **Privacy** tab.
3. Click **Sites**.
4. In the Address of website box, enter the domain name for the Side A Finesse server.
5. Click **Allow**.
6. In the Address of website box, enter the domain name for the Side B Finesse server.
7. Click **Allow**.
8. Click **OK**.



Note Finesse requires FQDNs in the certificate as well as in the browser address bar. The certificate will not be accepted if there is a mismatch between the two.

You must enable the following security settings to allow users to sign in:

- Run ActiveX controls and plug-ins
- Script ActiveX controls marked as safe for scripting
- Active scripting

To enable these settings:

1. From the Internet Explorer browser menu, select **Tools > Internet Options**.
2. Click the **Security** tab.
3. Click **Custom level**.
4. Under ActiveX controls and plug-ins, select **Enable** for **Run ActiveX controls and plug-ins** and **Script ActiveX controls marked safe for scripting**.
5. Under Scripting, select **Enable** for **Active Scripting**.

Finesse Desktop Failover

In a contact center deployment, Cisco Finesse is installed on two nodes. If the Finesse server that you are currently signed in goes out of service, a banner appears at the top of the desktop that notifies you that the desktop has lost connection to the server.

The Finesse desktop checks for the following:

- Whether the current Finesse server recovers its state
- Whether the alternate Finesse server is available

If the current Finesse server recovers, the desktop is reconnected. A banner appears that notifies you that you have successfully reconnected. If the current Finesse server does not recover but the alternate server is available, your desktop redirects to the alternate server and automatically signs you in.

When the desktop fails over or reconnects, if the last state you selected prior to the failover was Ready, Finesse attempts to preserve that state. When Finesse recovers, the desktop attempts to send a request to put you back in Ready state.



Note When the desktop tries to connect to the alternate server, you may see the following pop-up message:

Following certificates should be accepted before using Cisco Finesse Desktop....

If you are unable to accept the security certificates and see a request to accept the certificates again, close the pop-up and continue to sign in.



Note The Finesse desktop can only preserve a selection of Ready state that was made on the same desktop. The following exceptions apply:

- If you are in Wrap-Up state when the desktop recovers, Finesse does not send a request because doing so would automatically end your wrap-up session. After the wrap-up timer expires, your state is determined by Unified Communications Manager and may depend on the type of failover that occurred.
 - If you were put in Not Ready state (either by your supervisor or by the system (for example, Ring No Answer), your selection of Ready is not preserved.
 - Unsolicited state changes are not taken into account. For example, if a supervisor put you in Ready state (you did not select Ready), your Ready state may not be preserved. If your last selection was Ready and the system attempts to change your state to Not Ready (such as for Ring No Answer), your selection of Ready is preserved.
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Failover and Outbound Calls

Under certain failover and failback conditions, the Callback button and information about the outbound call may disappear from the Finesse desktop.

When Finesse fails over or fails back while you are on an outbound call, after you are signed back into the desktop, you cannot perform outbound-specific call operations, such as scheduling a callback or reclassifying

a call. You can still perform other call operations, such as transfer the call, conference the call, or place the call on hold. After the call is complete, Finesse places you in Not Ready state. You must change your state to Ready to receive your next call.

When you accept your next call, the outbound-specific call operations are available again.



Note Outbound-specific call operations are also not available if you sign out of Finesse and sign back in during an outbound call.

One Finesse Desktop or Finesse IPPA Session Per Agent

Finesse has the following agent session behavior:

- Finesse does not support agents signing in to both Finesse desktop and Finesse IPPA at the same time. Agents should sign in to only one instance of either the Finesse desktop or Finesse IP Phone Agent (IPPA) at one time.
- Finesse can support a mix of agents in which some agents use Finesse IPPA and other agents use the Finesse desktop (license permitting).
- When agents are signed in to the Finesse desktop or Finesse IPPA, they can also sign in to a third-party application using the Finesse API at the same time. (This setup is considered a custom development. Like other Finesse customizations, the customer or partner is responsible for proper development and testing of this custom setup.)

Accessibility

The Finesse desktop supports features that improve accessibility for low-vision and vision-impaired users. The following table shows how to navigate the Finesse desktop using the accessibility features.



Note Finesse supports these features only with Internet Explorer 11.0 and only on the agent desktop, not the supervisor desktop.

Desktop Element	To Perform the Following Actions	Use the Following Keys
Address Bar	Move between the address bar and the frames (in Internet Explorer only)	F6
Sign-in Page		

Desktop Element	To Perform the Following Actions	Use the Following Keys
Language Selector Drop-Down	Access the drop-down	Tab and Shift-Tab from the ID field
	Open the drop-down	Alt-Down Arrow or Enter
	Scroll the drop-down	Up and Down Arrows
	Select a language	Enter
	Hide the drop-down	Esc
Call Control Gadget		
Call Control Gadget Navigation	Access the call control gadget, phonebook, and keypad	Tab and Shift-Tab
	Open and close the call control gadget	Enter
Phonebook	Navigate the phonebook contact entries	Arrow keys
Keypad	Navigate the keypad number buttons	Tab
	Make a new call	<ul style="list-style-type: none"> • Press Enter in the number display field OR • Navigate to the Call button and press Enter
Wrap-Up Reason Drop-Down	Access the drop-down	Tab and Shift-Tab
	Open the drop-down	Alt-Down arrow
	Scroll the list of wrap-up reasons	Up and Down Arrows
	Select a wrap-up reason	Enter
	Close the drop-down	Esc
Callback Dialog Box and Reclassify Dialog Box (Outbound Calls)	Access the Callback and Reclassify buttons	Tab and Shift-Tab
	Open the Callback and Reclassify dialog boxes	Enter (on the respective buttons)
	Close dialog boxes	<ul style="list-style-type: none"> • Press Esc OR • Navigate away from the dialog boxes using Tab or Shift-Tab

Desktop Element	To Perform the Following Actions	Use the Following Keys
Reclassify Dialog Box	Navigate the elements	Tab, Shift-Tab, Up and Down Arrows
	Select an option	Enter
	Close the Reclassify dialog box	Esc
Callback Date and Time Calendar	Navigate to and from the Calendar	Tab and Shift-Tab
	Navigate within the Calendar	Arrows
	Select a Calendar date	Enter
	Move to the first or last days of a month	Home and End
	Close the pop-up	Esc
Callback Date and Time Controls	Navigate the elements	Tab and Shift-Tab
	Increase and decrease the Hour and Minute values	Up and Down Arrows
	Toggle the AM/PM button	Enter
	Close the pop-up	Esc
Desktop		
Send Error Report Tooltip	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
Manage Chat and Email Control Gadget		
State	Access the state	Tab or Shift-Tab
	Open the state drop-down	Enter
	Scroll the drop-down	Tab or Shift-Tab
	Choose the new state	Enter
Accept the incoming chat	Navigate to the Accept button	Tab or Shift-Tab and press Enter
Third-Party Gadget		
Maximize Icon	Access the maximize icon	Tab and Shift-Tab
	Maximize and restore a third-party gadget	Enter

