



Manage Workflows

On the Workflows tab of the Cisco Finesse administration console, you can create and manage workflows and workflow actions.

- [Workflows and Workflow Actions, on page 1](#)
- [Add Browser Pop Workflow Action, on page 6](#)
- [Add HTTP Request Workflow Action, on page 7](#)
- [Edit Workflow Action, on page 8](#)
- [Delete Workflow Action, on page 9](#)
- [Add Workflow, on page 10](#)
- [Edit Workflow , on page 11](#)
- [Delete Workflow, on page 12](#)

Workflows and Workflow Actions

You can use workflows to automate common repetitive agent tasks. A workflow has a unique name and a helpful description. Use the Manage Workflows and Manage Workflow Actions gadgets to view, add, edit, or delete workflows and workflow actions.

All workflows are team-level workflows. You cannot create a global workflow. If you need a global workflow, create a team workflow and assign it to all teams.

Finesse supports the following number of workflows and workflow actions:

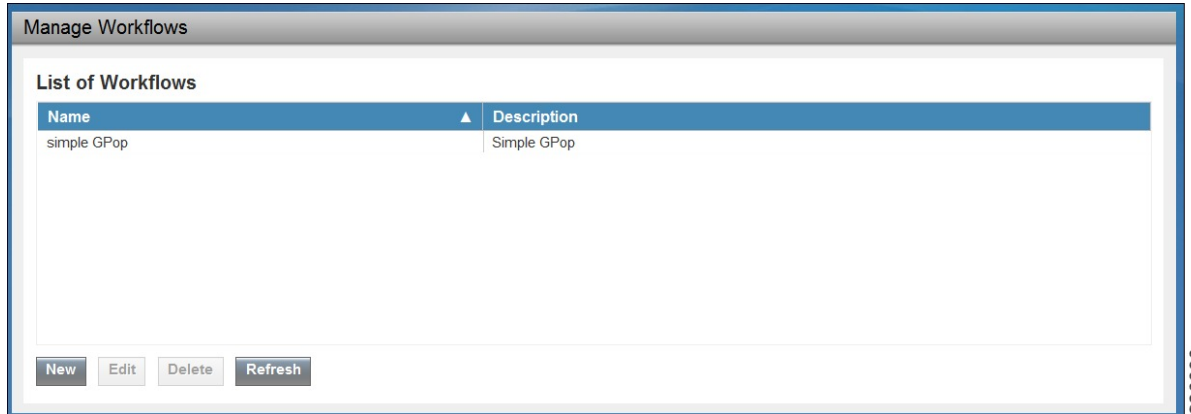
- 100 workflows per Finesse system
- 100 actions per Finesse system
- 20 workflows per team
- 5 conditions per workflow
- 5 actions per workflow
- 5 variables per action

Additionally, the following fields can be used to configure workflows:

- queueNumber
- queueName

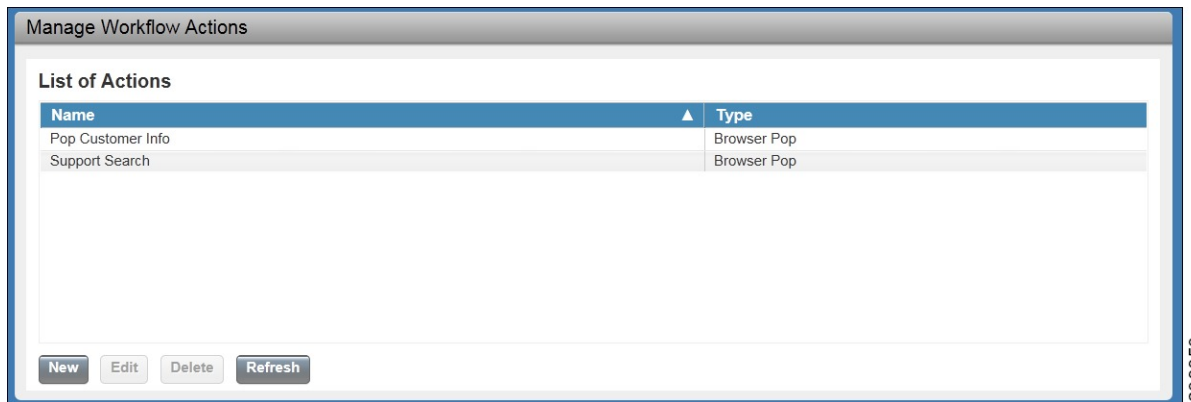
- callKeyCallId
- callKeyPrefix
- wrapUpReason

Click the column headers to sort workflows and workflow actions in ascending or descending order.



The following table describes the fields on the Manage Workflows gadget.

Field	Explanation
Name	The name of the workflow. The name must be unique and can be a maximum length of 40 characters.
Description	The description of the workflow. The description can be a maximum length of 128 characters.



The following table describes the fields on the Manage Workflow Actions gadget.

Field	Explanation
Name	The name of the workflow action. The name must be unique and can be a maximum length of 64 characters.
Type	The type of workflow. Possible values are Browser Pop, HTTP Request.

Actions on the Manage Workflows and Manage Workflow Actions gadgets:

- **New:** Add a new workflow or workflow action
- **Edit:** Edit an workflow or workflow action
- **Delete:** Delete a workflow or workflow action
- **Refresh:** Reload the list of workflows or workflow actions from the server

You can configure workflow actions to be handled by the Finesse desktop or in a third-party gadget. A third-party gadget can be designed to handle the action differently than Finesse does.

Each workflow must contain only one trigger. Triggers are based on Finesse dialog events. Dialog events include the following:

- When a call arrives
- When a call is answered



Note If you set a workflow to trigger when a call is answered, the workflow runs when an agent answers an incoming call or makes an outgoing call, or when a customer answers an Outbound Option call.

- When a call ends
- When making a call
- While previewing an Outbound Option call

The workflow engine uses the following simple logic to determine whether to execute a workflow:

- To determine whether a workflow should execute, its trigger set and conditions are evaluated against each dialog event received.
- The workflow engine processes workflow events for the first call that matches any configured workflow's trigger set and conditions. No other workflows run until this call has ended. If the agent accepts a second call while still on the first call, workflows do not run on the second call even after the first call has ended.



Note Outbound Preview calls are an exception to this rule. You can have a workflow run while the agent previews the call as well as when the agent accepts the call.

- After a workflow for a particular trigger type (for example, Call Arrives) executes, it never triggers again for the same dialog ID.

The workflow engine caches workflows for an agent when the agent signs in. Workflows do not change for the agent until the agent signs out and signs in again or refreshes the browser.



Note Workflows that trigger when a call arrives, when a call is answered, or when making a call run whenever the browser is refreshed. When an agent refreshes the browser, the workflow engine sees the call as newly arrived or newly made. If an HTTP request action is part of the workflow, the HTTP request is sent when the agent refreshes the browser. Applications that receive the HTTP requests must account for this scenario. Otherwise, undesired results may occur.

An example of a workflow is a Call Arrival event that triggers an action that collects information from the dialog event (for example, the ANI or customer information) and displays a web page containing customer information.

You can filter trigger events by the value of the data that comes in the event. You can configure a workflow to execute if any conditions are met or if all conditions are met.

Individual conditions consist of the following:

- A piece of event data to be examined, for example, DNIS or call variables.
- A comparison between the event data and entered values (for example, contains, is equal to, is not equal to, begins with, ends with, is empty, is not empty, and is in list)

When the trigger and its conditions are satisfied, a list of actions assigned to the workflow are executed. The actions execute in the order in which they are listed.

Workflows run only for agents and supervisors who are Finesse users. The Workflow Engine is a JavaScript library that runs client-side on a per-user basis within the Finesse desktop application. The desktop retrieves the workflows to execute for a user from the server when the user signs in or refreshes the browser.



Note Changes made to a workflow or its actions while a user is signed in are not automatically pushed to that user.

It is possible to set workflows, conditions, and actions that are contradictory so that a workflow or action cannot function. Workflows are not validated.

If multiple workflows are configured for a team, the Workflow Engine evaluates them in the configured order. The Workflow Engine ignores workflows with no actions. When the Workflow Engine finds a workflow with a matching trigger for the event and the workflow conditions evaluate to true, then that workflow is the one used and subsequent workflows in the list are not evaluated. Workflows with no conditions evaluate to true if the event matches the workflow trigger. All workflows are enabled by default. Only one workflow for a specific user can run at a time.

The Workflow Engine retrieves dialog-based variables used in workflow conditions from the dialog that triggered the workflow. If a variable is not found in the dialog, then its value is assumed to be empty.

The Workflow Engine executes the actions associated with the matched workflow in the order in which they are listed. The Workflow Engine executes actions in a workflow even if the previously executed action fails. Failed actions are logged.

The Finesse server controls which calls are displayed to the Finesse user. If the user has multiple calls, the workflow applies only to the first call that matches a trigger. If the first call displayed does not match any triggers but the second call does match a trigger, the Workflow Engine evaluates and processes the triggers for the second call.

A call is considered to be the first displayed call if it is the only call on the Finesse desktop when it appears. If two calls on a phone are merged (as they are in a conference call), then the first displayed call flag value of the surviving call is used.

If the user has a call when the user refreshes the browser, the Workflow Engine evaluates the call as it is. If the dialog data (call variable values) change, the data may not match the trigger and conditions of the original workflow. The data may match a different workflow or no workflows at all.

If the user has multiple calls when the user refreshes the browser, the Workflow Engine treats the first dialog received from the Finesse server as the first displayed call. This call is not necessarily the same call that was the first displayed call before the browser refresh. Dialogs received for any other call are ignored because they are not considered first displayed calls. If dialogs for more than one call are received before the Workflow Engine is loaded after the browser refresh, no dialogs are evaluated because none are considered first displayed calls.

Workflows run for both Finesse agents and supervisors. The team to which the supervisor belongs (as distinguished from the team that the supervisor manages) determines which workflows run for the supervisor. You may want to put the supervisors in their own team to keep agent workflows from being run for them.

Workflow Triggers and Outbound Calls



Note When you create a workflow specifically for Outbound Option calls, add a condition of BASTatus is not empty (except for the Workflow Trigger 'When a call arrives' as BASTatus will be empty at that point of time). This condition ensures that the workflow can distinguish Outbound Option calls from agent-initiated outbound calls.

The following table illustrates when workflows trigger in outbound call scenarios.

Workflow Trigger	Direct Preview Outbound Call	Preview Outbound Call	Progressive/Predictive Outbound Call
While previewing a call	When the agent previews the call (before accepting or rejecting it)	When the agent previews the call (before accepting or rejecting it)	Does not trigger
When a call arrives	Does not trigger	When the agent accepts the call	When the call arrives on the agent desktop
When a call is answered	When the customer answers the call and during failover	When the customer answers the call and during failover	When the customer answers the call
When a call is made	When the customer call is initiated	When the customer call is initiated	When the customer call is initiated, and during failover
When a call ends	When the customer call ends	When the customer call ends	When the customer call ends

Add Browser Pop Workflow Action

The Browser Pop workflow action opens a browser window or tab on the user's desktop when workflow conditions are met.



Note Whether the action opens a new window or tab on the desktop depends on the target user's browser settings.

Procedure

- Step 1** In the Manage Workflow Actions gadget, click **New**.
The New Action area appears.

390061

- Step 2** In the Name box, enter a name for the action.
- Note** Workflow action names are limited to 64 characters.
- Step 3** From the Type drop-down list, select **Browser Pop**.
- Step 4** From the Handled By drop-down list, select what will execute the action, either the Finesse Desktop or Other (a third-party gadget).
- Step 5** In the Window Name box, enter the name that serves as the ID of the window that is opened. Any action that uses this window name reuses that specific window.
- Note** Window names are limited to 40 characters, and can be blank. If you leave the window name blank, a new window opens every time the action runs.

- Step 6** Enter the URL of the browser window to open, and then click the tag icon at the right of the box and select one or more variables from the drop-down list to add tags.

Example:

http://www.google.com/search?q= &

For every variable you select, you can enter test data in the Sample Data box. A sample URL is automatically built in the Browser URL box below the Sample Data area. To test the URL, click Open to open the URL in your browser.

Note Finesse does not validate the URL you enter.

- Step 7** Click **Save**.
-

Add HTTP Request Workflow Action

The HTTP Request workflow action makes an HTTP request to an API on behalf of the desktop user.

Procedure

- Step 1** In the Manage Workflow Actions area, click **New**.
The New Action area appears.
- Step 2** In the Name box, enter a name for the action.
A workflow action name can contain a maximum of 64 characters.
- Step 3** From the Type drop-down list, select **HTTP Request**.
- Step 4** From the Handled By drop-down list, select what will execute the action, the Finesse desktop or Other (a third-party gadget).
- Step 5** From the Method drop-down list, select the method to use.
You can select either PUT or POST.
- Step 6** From the Location drop-down list, select the location.
If you are making the HTTP request to a Finesse API, select **Finesse**. If you are making a request to any other API, select **Other**.
- Step 7** In the Content Type box, enter the content type.
The default content type is application/xml, which is the content type for Finesse APIs. If you are using a different API, enter the content types for that API (for example, application/JSON).
- Step 8** In the URL box, enter the URL to which to make the request. To add variables to the URL, click the tag icon at the right of the box and select one or more variables from the drop-down list.
Note The drop-down list contains variables from all the configured media channels.

Example:

/finesse/api/User/  3770993

Note The preceding example is the URL for a Finesse API. If you want to make a request to another API, you must enter the entire URL (for example, <http://googleapis.com>).

You can click the tag icon at the right of the box and select one or more variables from the drop-down list to add tags to the URL. In the preceding example, to add the dialogId, click the tag icon and select dialogId from the list.

Step 9 In the Body box, enter the text for the request. The body must match the content type (for example, if the content types is application/xml, the body must contain XML). To add variables to the body, click the tag icon at the right of the box and select one or more variables from the drop-down list.

For every variable you add, you can enter test data in the Sample Data box.

Step 10 Click **Save**.

Edit Workflow Action

Procedure

Step 1 In the Manage Workflow Actions gadget, select the action that you want to edit.

Step 2 Click **Edit**.

The Edit Action area appears.

Manage Workflow Actions

List of Actions

Name	Type
Pop Customer Info	Browser Pop

Edit Action

Name: Pop Customer Info
Type: Browser Pop
Handled by: Finesse Desktop

Window Name: Customer_Info
Browser URL: www.google.com

Preview
Browser URL: www.google.com Open

Save Cancel

390062

- Step 3** Edit the fields that you want to change.
- Step 4** Click **Save**.

Delete Workflow Action

Procedure

- Step 1** In the Workflow Actions gadget, select the action that you want to delete.
The Delete Action area appears.
- Step 2** Click **Delete**.
A question appears asking you to confirm that you want to delete the selected action.
- Step 3** Click **Yes** to confirm the deletion of the selected action.

Add Workflow

Procedure

- Step 1** In the Manage Workflows gadget, click **New**.
The New Workflow area appears.

New Workflow

Name

Description

When to perform Actions

How to apply Conditions

✘

Ordered List of Actions

Name	Type
Pop Customer Info	BROWSER_POP ✘

390064

- Step 2** In the Name box, enter the name of the workflow.
Note The name is limited to 40 characters.
- Step 3** In the Description box, enter a description of the workflow.
Note The description is limited to 128 characters.
- Step 4** In the When to perform Actions drop-down list, select the event that triggers the workflow.

Step 5 In the How to apply Conditions box, select if all conditions are met, or if any conditions are met, and then click **Add Condition** to add up to five conditions.

Example:

For example, you can specify that the action is taken when CallVariable 1 is equal to 123 and CallVariable 2 begins with 2.

Step 6 In the Ordered List of Actions area, click **Add** to open the Add Actions area. Click an action in this area to add it to the Ordered List of Actions.

Step 7 Use the up and down arrows next to the Ordered List of Actions to move actions into the order in which they should be performed.

Step 8 Click **Save**.

Step 9 Assign the workflow to one or more teams.

Note A workflow does not run until it is assigned to a team.

Related Topics

[Assign Workflows to Team](#)

Edit Workflow

Procedure

Step 1 In the Manage Workflows gadget, select the workflow you want to edit.

Step 2 Click **Edit**.

The Edit Workflow area appears.

Edit Workflow

Name

Description

When to perform Actions

How to apply Conditions

[None Configured]

Ordered List of Actions

Name	Type
GPop	BROWSER_POP <input type="button" value="X"/>

390065

Step 3 Edit the fields that you want to change.

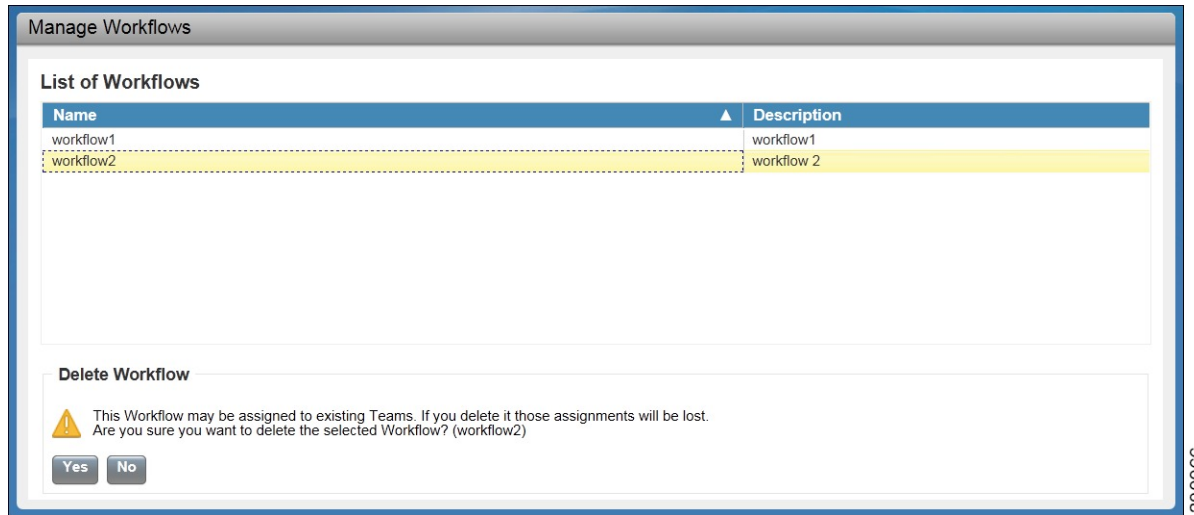
Step 4 Click **Save**.

Delete Workflow

Procedure

Step 1 In the Manage Workflows gadget, select the workflow that you want to delete.
The Delete Workflow area appears.


Step 2 Click **Delete**.
A question appears asking you to confirm that you want to delete the selected workflow.



The screenshot shows a 'Manage Workflows' dialog box. At the top, it says 'Manage Workflows'. Below that is a section titled 'List of Workflows' containing a table with two columns: 'Name' and 'Description'. The table has two rows: 'workflow1' and 'workflow2'. The 'workflow2' row is highlighted in yellow. Below the table is a 'Delete Workflow' section with a warning icon and the text: 'This Workflow may be assigned to existing Teams. If you delete it those assignments will be lost. Are you sure you want to delete the selected Workflow? (workflow2)'. At the bottom of this section are two buttons: 'Yes' and 'No'.

Name	Description
workflow1	workflow1
workflow2	workflow 2

Delete Workflow

 This Workflow may be assigned to existing Teams. If you delete it those assignments will be lost. Are you sure you want to delete the selected Workflow? (workflow2)

390066

Step 3 Click **Yes** to confirm the deletion of the selected workflow.

