Cisco Finesse Agent and Supervisor Desktop User Guide Release 12.0(1)

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Preface

Change History

The following table lists the changes made to this guide for Cisco Finesse 12.0(1) release version:

Change	Date
Added the security certificate acceptance procedure for Edge chromium browser.	2020
Added Edge Chromium details.	

Change	Date
Initial Release of Document for Release 12.0(1)	2019
The logo and the product name appearing in the Finesse desktop can be customized.	
The agent desktop has a complete new look and feel as part of the user experience refresh.	
The login flow has a new User Experience (SSO, Non-SSO, and Hybrid users).	
Security Certificates appear in a browser popup and can be individually accepted.	
Agent desktop support includes Internet Explorer 11 native, Microsoft Edge, Chrome, and Firefox.	
The left navigation bar has customizable icons. The navigation bar can be pinned and unpinned by users to increase or decrease the Finesse desktop area.	
The State Control for Voice and Digital Channels is in the header.	
User Options icon has the following options: • Agent Name • Agent ID • Extension • Send Error • Sign Out with Reason Codes listed	
Desktop popover that informs of any incoming voice or campaign initiated outbound calls.	
Make calls from the dialpad icon in the header either from the phonebook list or by manually entering the number to dial out.	
Use Desktop Chat to chat internally with other agents, supervisors, and other Subject Matter Experts in the organization.	
Workflow support extended to digital channels.	
Search and set Wrap-Up reason.	
Reverse wrap-up state timer display.	
Accessibility for Digital Channel State Control, Queue Statistics, Desktop Chat, and Team Message.	

Change	Date
Dialpad supports text, numbers, and special characters (Only *, #, &, and +).	
From the Actions tab in the Team Performance gadget, the Supervisor can: • View the active call details of an agent • Monitor an agent • Change the agent state to Ready or Not Ready • Sign Out the agent .	
The Time in State field in the Team Performance gadget shows the total duration since the agent has logged out.	
Supervisors can use Team Message to broadcast messages to one or multiple teams. Agents can view these messages as a banner on their desktop in real-time.	

About This Guide

Cisco Finesse has undergone a user experience refresh in release 12.0(1). This guide documents the new look and feel of the Agent and Supervisor desktop layouts along with release specific features.

This guide describes how to use the Finesse agent and supervisor desktop.

Audience

This guide is intended for Unified Contact Center Enterprise (Unified CCE), Packaged Contact Center Enterprise (Packaged CCE), and Hosted Collaboration Solution(HCS) for Contact Center agents and supervisors who use the Finesse desktop.

Related Documents

Document or resource	Link
Cisco Finesse Documentation Guide	https://www.cisco.com/en/US/partner/products/ps11324/products_documentation_roadmaps_list.html
Configure SNMP Trap in Cisco Finesse	https://www.cisco.com/c/en/us/support/docs/contact-center/finesse/214387-configure-snmp-trap-in-cisco-finesse.html
Cisco.com site for Finesse documentation	https://www.cisco.com/en/US/partner/products/ps11324/tsd_products_support_series_home.html

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Cisco Bug Search Tool

Cisco Bug Search Tool (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

Field Notice

Cisco publishes Field Notices to notify customers and partners about significant issues in Cisco products that typically require an upgrade, workaround, or other user action. For more information, see *Product Field Notice Summary* at https://www.cisco.com/c/en/us/support/web/tsd-products-field-notice-summary.html.

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- End-of-Sale or Support Announcements
- Software Updates
- Updates to Known Bugs

For more information on creating custom subscriptions, see *My Notifications* at https://cway.cisco.com/mynotifications.

Documentation Feedback

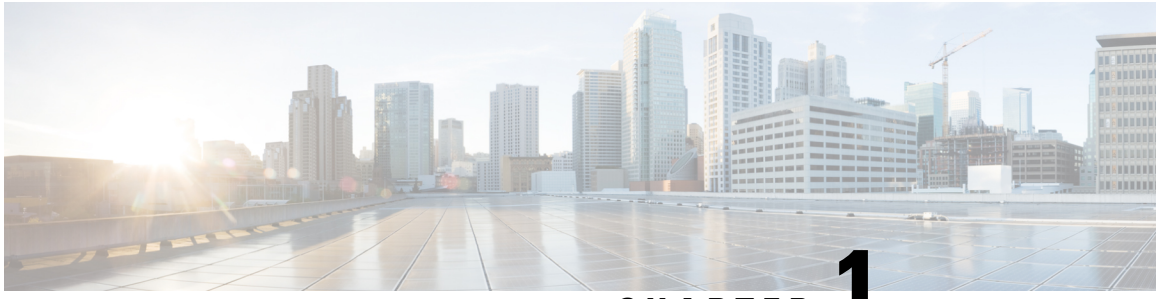
To provide comments about this document, send an email message to the following address: contactcenterproducts_docfeedback@cisco.com

We appreciate your comments.

Conventions

This document uses the following conventions:

Convention	Description
boldface font	Boldface font is used to indicate commands, such as user entries, keys, buttons, folder names, and submenu names. For example: • Choose **Edit** > **Find**. • Click **Finish**.
italic font	Italic font is used to indicate the following: • To introduce a new term. Example: A *skill group* is a collection of agents who share similar skills. • A syntax value that the user must replace. Example: IF (*condition*, *true-value*, *false-value*) • A book title. Example: See the *Cisco Unified Contact Center Enterprise Installation and Upgrade Guide*.
`window font`	Window font, such as Courier, is used for the following: • Text as it appears in code or that the window displays. Example: `<html><title>Cisco Systems, Inc. </title></html>`
`< >`	Angle brackets are used to indicate the following: • For arguments where the context does not allow italic, such as ASCII output. • A character string that the user enters but that does not appear on the window such as a password.



CHAPTER 1

Cisco Finesse Desktop Interface

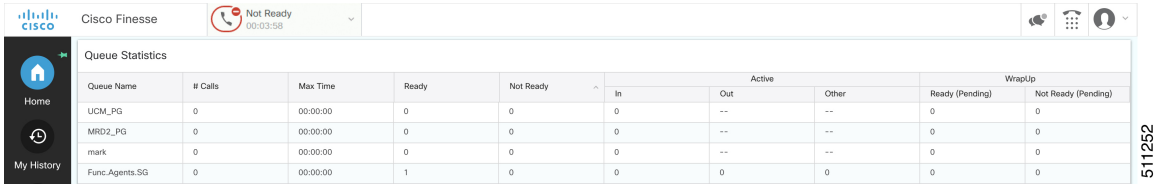
When you sign in to Cisco Finesse, the appearance of the desktop depends on whether your role is that of an agent or a supervisor. Supervisors have additional features that appear on their desktops. The supported resolution for the Finesse desktop is 1366 x 768 or higher.

This chapter describes the interface of the Finesse desktop for agents and supervisors. The Finesse desktop is customizable. Your administrator may add custom gadgets to the desktop or change the appearance. This guide discusses the Finesse desktop as it appears out of the box.

Finesse Agent Desktop

The following figure shows the Cisco Finesse agent desktop as it appears when you first sign in. Your initial status is Not Ready.

Figure 1: Cisco Finesse Agent Desktop



Note Cisco Finesse has undergone a user experience refresh in release 12.0(1).

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, the following buttons are available in the described situations:

Situation	Buttons Available
When you're on a call	Consult, Direct Transfer, Hold, Keypad, and End
When there's a call on hold and you're on a consult call	Conference, Transfer, Retrieve, and End
When you're on a conference call	Hold, Consult, Direct Transfer, Keypad, and End

Note Finesse agent desktop controls should be preferred over the agent phone device for call control operations for a more robust and efficient experience for the agent.

For more information on the supported devices, see *Contact Center Enterprise Solution Compatibility Matrix* at https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-device-support-tables-list.html.

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

- **Basic call control:** Answer, hold, retrieve, end, and make calls.
- **Toaster Notifications:** Notification that informs of any voice calls when the Finesse desktop window or tab is inactive.
- **Desktop notifications:**
  - **For incoming voice calls:** Popover with configured customer details appear with the Answer button.
  - **For campaign initiated outbound calls:** Popover with configured customer details appear with the Accept or Decline buttons.
- **Advanced call control:** Make a consult call and transfer or conference the call after the consultation.
- **Agent state and call timers:** The agent state timer indicates the duration in Ready or Not Ready state. The call timer indicates total call time, hold time, and wrap-up time.
- **Single-step transfer:** Transfer a call without first initiating a consultation call.
- **Preview Outbound calls:** Preview the customer information for the call before you choose to accept, reject, or close the contact.
- **Schedule a callback:** Schedule a callback for an Outbound Dialer call to call a customer back at a more convenient time.
- **Preview Outbound Personal Callback calls:** After you preview a personal callback call, you can choose to accept or reject the contact.
- **Send DTMF digits:** Send DTMF digits to interact with an IVR system.
- **Not Ready and Sign Out reasons:** Reasons to indicate why you're changing your status to Not Ready or Sign Out (your administrator defines these reasons).
- **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 the contacts that are listed in your phonebook.
- **Workflows:** Your administrator can define workflows that are triggered by call and digital channels events (for example, your administrator may create a workflow that causes a browser pop on your desktop when a call arrives).
- **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.
- **System Reason Codes:** Due to system-generated events, your state may change to either Not Ready or Sign Out with system-generated reason codes. In this case, the agent state is displayed in yellow.
- **Desktop Chat:** You can chat with other agents, supervisor, or with other Subject Matter Experts in the organization.
- **Making a Call:** You can make a call from the dialpad, by either entering the number or using the one-click option in the phone book.
- **Team Message:** Teams can view the messages sent by their respective supervisors and take necessary action.
- **Agent Device Selection:** Agents can select the telephony device when logging into Cisco Finesse desktop.

The functionality available to you depends on what your administrator has configured. For example, if your administrator didn't define Wrap-Up Reasons, you can't choose a wrap-up reason.

Note Unified CCE uses ASCII encoding (8-bits), while Finesse uses UTF-8 encoding (32-bits), so the First Name field in the Call Control area is truncated to only 16 characters.

Finesse Queue Statistics Gadget

The Finesse agent desktop also provides a Queue Statistics gadget. The Queue Statistics gadget displays information about the queues to which you're assigned. You can click the column headers to sort information in ascending or descending order. The Queue Statistics gadget provides information about the following:

- Queue Name: Name of the queue.
- # Calls: Number of calls waiting in the queue.
- Max Time: Duration of the oldest call has been in the queue.
- Ready: Number of agents assigned to the queue who are in Ready state.
- Not Ready: Number of agents assigned to the queue who are in Not Ready state.
- Active
  - In: Number of agents assigned to the queue who are on inbound calls.
  - Out: Number of agents assigned to the queue who are on outbound calls.
  - Other: Number of agents assigned to the queue who are on internal consult calls.
- Wrap-Up

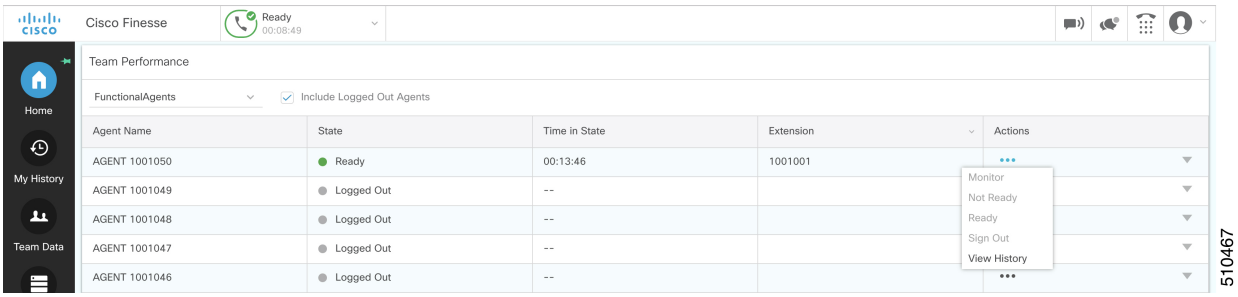
- Ready (Pending): Number of agents assigned to the queue who transitions to Ready state when Wrap-Up ends.
- Not Ready (Pending): Number of agents assigned to the queue who transitions to Not Ready state when Wrap-Up ends.

For additional information about how the Queue Statistics gadget collects and displays statistics, see the gadget description provided in Finesse Supervisor Desktop, on page 4.

Finesse Supervisor Desktop

The following figure shows the Cisco Finesse supervisor desktop.

Figure 2: Finesse Supervisor Desktop



Note Cisco Finesse has undergone a user experience refresh in release 12.0(1).

Finesse Supervisor Desktop provides call control functionality and the following:

- Team Performance gadget
- Queue Statistics gadget
- Team Message

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, their recent call history, and state history and their extension. 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.

Note For the logged out agent, the **Time in State** field shows the total duration since the agent has logged out. For the time in the logged out state to be displayed, the agent must have logged in or changed the state at least once via Finesse desktop or through other applications post Finesse server restart. If not, this field displays a blank value.

Team Performance gadget also provides the following functionality:

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

When you silently monitor an agent, the **Barge In** button appears in the call control area. 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.

Note As Unified CCE uses ASCII encoding (8-bits), while Finesse uses UTF-8 encoding (32-bits), the First Name field in the Team Performance window is truncated to only 16 characters.

Finesse Queue Statistics Gadget

The Queue Statistics gadget displays a list of the queues for which you are responsible. Click the column headers to sort the information in ascending or descending order.

The Queue Statistics gadget provides the following columns:

- Queue Name: Name of the queue
- # Calls: Number of calls waiting in the queue
- Max Time: Duration of the oldest call has been in the queue
- Ready: Number of agents assigned to the queue who are in Ready state
- Not Ready: Number of agents assigned to the queue who are in Not Ready state
- Active
  - In: Number of agents assigned to the queue who are on inbound calls
  - Out: Number of agents assigned to the queue who are on outbound calls
  - Other: Number of agents assigned to the queue who are on internal consult calls
- Wrap Up
  - Ready (Pending): Number of agents assigned to the queue who will transition to Ready state when wrap-up ends.
  - Not Ready (Pending): Number of agents assigned to the queue who will transition to Not Ready state when wrap-up ends.

The following notes provide additional information about how the Queue Statistics gadget collects and displays statistics:

- Finesse does not compute the queue statistics, it receives the queue statistics from Unified CCE instead.
- Finesse does not display the queue statistics for the default queue (default skill group on Unified CCE).
- The Active Out statistic includes agents talking on outbound calls placed by those agents. It also includes non-routed calls placed to external devices that are not monitored by Unified CM and to devices in a different Unified CM cluster. It does not include agents on Outbound Option calls.
- If an agent places a direct call to another agent's extension, Unified CCE increments the Active Out statistic for the default queue (skill group). However, as Finesse does not display the queue statistics for the default queue, the Active Out statistics do not change for any of the Finesse queues to which the agent is assigned.

Team Message

Supervisors can broadcast messages to their teams. Teams can view the messages sent by their respective supervisors and take necessary action. This is a one-way communication from supervisors to their teams.

State and Call Timers

The agent state timer appears next to the agent state drop-down when you are in Not Ready or Ready state. This timer updates every second and the format is mm:ss. If you are in any 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 change the reason code of Not Ready), the timer resets to 00:00.

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 total call on hold time. 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 duration that you have been in wrap-up state. If wrap-up is enabled, you transition to wrap-up state when you end the call. Depending on the configuration done by the administrator, the timer can either countdown or count up the time.

If the call exceeds one hour, the timer still displays in minutes and seconds. For example, at one hour and 15 seconds, the timer displays 1:00:15.

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 “- -:- -”

Finesse Desktop Behavior

If the Cisco Finesse desktop isn't the active window and you receive an incoming call on the desktop, the Finesse desktop either becomes the active window or flashes in the taskbar. The Cisco Finesse desktop behavior varies based on the browser and the number of tabs opened.

If you refresh the browser when a gadget is maximized, the gadget returns to its previous size.

Toaster Notification

When there's an incoming call and the Cisco Finesse desktop window or tab is inactive, Finesse displays a notification with the call details. Click the notification to restore the Finesse desktop.

The Operating System controls the position of the notification and may display it at any one of the four corners of your computer screen.

Note Internet Explorer doesn’t support toaster notification.

Browser Settings for Chrome

The toaster notifications may not pop up in the Chrome browser for Windows 10, but are displayed in the Notification Action Center. To display the notifications on your desktop, and not in the Notification Action Center, disable the **Enable Native Notifications** feature in the Chrome browser (version 86 and earlier). Notifications displayed on your desktop, are in the native format.

1. Open Chrome and enter `chrome://flags/#enable-native-notifications.`
2. Press the **Enter** key on your keyboard.
3. Select the **Disabled** option from the labeled box drop-down list.
4. Click **Relaunch Now**.

   The notifications are displayed on your desktop in the native format.

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 notifying that the desktop has lost connection to the server.

The Finesse desktop checks if the current Finesse server state is recovered and if the alternate Finesse server is available.

If the current Finesse server recovers, the desktop is reconnected. If it does not recover and the alternate server is available, your desktop redirects to the alternate server and automatically signs you in.

If the desktop fails over or reconnects and 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 keep seeing the message to accept the certificates, close the pop-up and continue to sign in.

Note The Cisco Finesse desktop can only preserve Ready states that were selected on the same desktop. The following exceptions apply:

- If you are in Wrap-Up state when the desktop recovers, Cisco Finesse does not send a request because that 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 your state was changed to Not Ready (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 changes your state to Ready (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 Ready (such as for Ring No Answer), your selection of Ready is preserved.

One Finesse Desktop or Finesse IPPA Session Per Agent

Finesse has the following agent session behavior:

- Finesse does not support agents simultaneously sign in to Finesse desktop and Finesse IPPA. Agents must sign in to Finesse desktop or Finesse IPPA.
- Finesse can support a mix of agents where some agents use Finesse IPPA and other agents use Finesse desktop (license permitting).
- When agents are signed in to the Finesse desktop or Finesse IPPA, they can also simultaneously sign in to a third-party application using the Finesse API. (This setup is considered a custom development. Similar to other Finesse customizations, the customer or partner is responsible for proper development and testing of this custom setup.)

Multiline Support

If multiline is configured, you can have one or more secondary lines on your phone. Finesse does not publish or display any information about the secondary lines on the Finesse desktop.

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 If you are using Mac keyboard, then press **Option** instead of **Alt**. For example, for **Language Selector Drop-Down** press Option–Down Arrow.

Table 1: Web Accessibility

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		
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
Mobile Agent Help Tooltips	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
Certificate Acceptance	Toggle between the certificate links	Tab and Shift-Tab
	Open the certificate link to accept the certificate	Enter
Call Control Gadget		
Incoming Call Popover	Accept the incoming call	Enter
Call Control Gadget Navigation	Access the call control gadget, phone book, and keypad	Tab and Shift-Tab
	Open and close the call control gadget	Enter
Phone Book	Navigate the phone book contact entries	Arrow keys
	Select the contact to make a call	Enter
	Select the contact to copy the number to the dialler	Enter

Desktop Element	To Perform the Following Actions	Use the Following Keys
Dialpad	Toggle between the phone book and the keypad	Tab, Shift - Tab, and Enter
	Navigate the keypad number buttons	Arrow keys, Tab, and Shift - Tab
	Make a new call, Transfer a call, or consult a call	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	Enter
	Scroll the list of wrap-up reasons	Up and Down Arrows
	Select a wrap-up reason	Space Bar
	Apply the wrap-up reason	Enter
	Close the drop-down	Esc
Callback and Reclassify Dialog Boxes (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	Press Esc OR Navigate away from the dialog boxes using Tab or Shift-Tab
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

Desktop Element	To Perform the Following Actions	Use the Following Keys
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 Chat		
Certificate Acceptance	Toggle between the certificate links	Tab and Shift-Tab
	Open the certificate link to accept the certificate	Enter
Change Status	Open the drop-down to change the status	Enter
	Toggle between the status	Arrow Keys, Tab and Shift-Tab
	Apply Status	Enter
Search Contacts	Toggles between the search results	Tab and Shift-Tab
	Close the search results drop-down	Esc
Contact List	Toggle between contacts and groups	Arrow Keys, Tab and Shift-Tab
	Select multiple contacts	Ctrl + Up and Down arrows
	After selecting multiple contacts, navigate to the Move or Delete options	Tab and Shift-Tab
	Select the Move or Delete option	Enter
Contact	Navigate to contact header options	Tab
	Open contact header options	Enter
	Navigate contact header options	Arrow Keys, Tab and Shift-Tab
	Navigate through Add, Edit and Delete Contact windows	Tab and Shift-Tab
	Select an option	Enter

Desktop Element	To Perform the Following Actions	Use the Following Keys
Group	Navigate to group header options	Tab
	Open group header options	Enter
	Navigate group header options	Arrow Keys, Tab and Shift-Tab
	Navigate through Edit and Delete Group windows	Tab and Shift-Tab
	Select an option	Enter
Chat Window	Toggle between chat tabs	Tab and Shift-Tab
	Select chat tab	Enter
	Close chat tab	Enter
	Close chat window	Enter
	Resize chat window	Enter
	Minimize or restore chat window	Enter
Team Message		
Team Message	Navigate the elements	Tab, Shift-Tab, Up and Down arrows
	Select an option	Enter
	Close the dialog box	Esc
	Show recent messages	Shift-Tab
	Back and Delete	Tab-Enter
Queue Statistics Gadget		
Queue Statistics Gadget	Access the Queue Statistics Gadget	Tab and Shift-Tab
	Navigate the Queue Statistics table header	Tab and Shift-Tab
	Navigate the Queue Statistics table cells	Tab and Shift-Tab
Desktop		
Send Error Report	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
	To send the error report	Enter
Sign out	To sign out of the Finesse desktop	Enter
Third-Party Gadget		

Desktop Element	To Perform the Following Actions	Use the Following Keys
Maximize Icon	Access the maximize icon	Tab and Shift-Tab
	Maximize and restore a third-party gadget	Enter
Digital Channels		
Agent State	Access the digital channel agent state gadget	Tab and Shift-Tab
	Open and close the gadget options drop-down.	Enter
	Close the gadget options drop-down.	Esc
	Navigating options in drop-down.	Up and Down Arrows
	Select an option in drop-down.	Enter

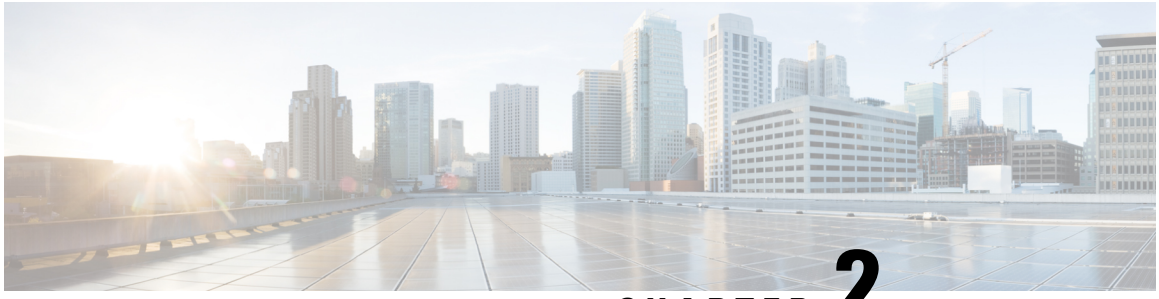
Screen Reader Support

Cisco Finesse also supports JAWS screen reading software for the following elements.

For more information on the supported JAWS version, see Voluntary Product Accessibility Templates (VPAT) report for Contact Center at https://www.cisco.com/c/en/us/about/accessibility/voluntary-product-accessibility-templates.html.

Page or gadget	Element	Notes
Sign-in Page	Mobile agent help icon	The screen reader reads descriptive text for the help icon.
	Invalid Sign in error	When a sign-in error occurs due to invalid password or username, the screen reader reads the error. **Note** In Internet Explorer, the message is read 1 to 3 times.
Queue Statistics gadget	Title	The screen reader reads the gadget title (Queue Statistics).
	Table	The screen reader reads each table header and each cell in the table. **Note** The values in a cell may not be up-to-date. For the screen reader to read the latest value, move to another cell and then return to the old cell.

Page or gadget	Element	Notes
Call Control Gadget	Phone Book	The screen reader reads the contents of the phone book. **Note** • The screen reader is not able to read the summary of this table by using CTRL+INSERT+T. As a workaround, use the heading key instead. • The phone book does not support use of CTRL+ALT+RIGHT/LEFT/UP/DOWN arrow keys to move between cells in the table. • The screen reader does not read the heading of each column in Internet Explorer 11.
	Keypad	The screen reader reads the number of the keypad and the letters that go with it (ABC, DEF, and so on). **Note** • In the table summary, if you select the table, the screen reader reads the summary of the table, which is Keypad. • If you press Enter on a Keypad button with JAWS enabled, the digits are not entered or displayed in the edit box on top of the Keypad. • If you use Ctrl+Alt+Right, Left, Up, and Down arrow keys to move between the cells, extra buttons are read on the Keypad.
	Call row errors	The screen reader reads the call row error messages.
Agent Desktop	Headings	The screen reader reads all the headings on the Agent Desktop (HTML elements <h1> to <h6]>).
	Failover Banner	During failover, the screen reader reads the statement from the red banner. When the Failover is complete, the screen reader reads the statement from the green banner.
	State Change text	Whenever the agent state changes, the screen reader reads the new state.
Desktop	Send clients logs help icon	The screen reader reads descriptive text for the help icon.



CHAPTER 2

Common Tasks

This chapter describes common tasks that agents and supervisors perform. These tasks include signing in and signing out of the desktop, changing your state, selecting reason codes and wrap-up reasons, and call control tasks.

Browser Settings for Agent and Supervisor Desktop

To ensure that all features of the Cisco Finesse agent and supervisor desktop work properly, you must disable popup blockers from the following supported browsers:

- Chrome (version 60 or higher)

Note Ensure to disable the **Automatic tab discarding** feature in Chrome (version 74 and earlier) to avoid exiting the Cisco Finesse desktop tab when the system memory is low.

- Firefox (version 52 and higher ESR)
- Edge Chromium (Microsoft Edge v79 and later)
- Internet Explorer 11.0 (Native Mode)

  Apart from disabling popup blockers, to configure the privacy and advanced settings in Internet Explorer, go to **Tools** > **Internet Options** > **Privacy**. Enter the domain name of Side A and B Finesse servers, and click **Allow**.

Sign In to Cisco Finesse Desktop

The administrator can set up custom security banner message and custom logon message for Finesse Desktop users. Both the message types can be configured at the same time. The custom logon message can be used to configure the logon banner commonly across all processes that support the feature.

Note This feature custom logon message is available only for CCX deployment.

If your administrator has defined a custom security banner message, the message is displayed at the bottom of the Finesse desktop **Sign In** page. If your administrator has defined a custom logon message, the message is displayed in a pop-up dialog box after you click **Sign In**. You must acknowledge the custom logon message to sign in.

Procedure

Step 1 In the address bar of your browser, enter https://FQDN of Finesse Server: 8445/desktop, where FQDN of Finesse Server is the fully qualified domain name of the Cisco Finesse server.

Step 2 If your contact center has installed a language pack for Cisco Finesse, on first login, a language selector screen appears on the desktop. From the language selector drop-down, choose the language that you want to appear on the desktop. Click **Next**.

Note You can also select a language by passing the locale as part of the URL (for example, https://*FQDN of Primary Server:8445*/desktop?locale=fr_FR) or by changing your browser preferred language. The default language is English (en_US).

If your contact center does not have a language pack installed for Cisco Finesse, the desktop locale is English only.

Step 3 In the **Username** field, enter your Agent ID or user ID.

Note
- User IDs are case-sensitive and can contain numbers (0-9), hyphens (-), underscores (_), and periods (.). User IDs are assigned to you by your administrator and cannot begin or end with a period or contain two periods in a row.
- Cisco Finesse agent usernames are restricted to 7-bit printable ASCII characters (any of the 94 characters with the numeric values from 33 to 126). The supported characters are: **A-Z and 0-9**,**,**,-,**!**, ~,`,**$**,^,**&**,**(**,**)**,**"**,**'**,**{**,**}**,**@**,**.**. The following characters are not supported: /, \, **[**,**]**,**:**,**;**,|, =,**,**,+, ***,**?**, <, >.
- The Username (desktop Sign In page) in Unified CCE deployment refers to the AgentID (Peripheral number).

Step 4 In the **Password** field, enter your password.

Step 5 In the **Extension** field, enter the extension of your phone.

Step 6 Click **Sign In**.

Note
- The **Sign In** button is enabled once the username, password, and extension fields are entered. If any field is incomplete, the **Sign In** button remains disabled.
- To change the language that appears on your desktop, use the **Change the Language** link. On the language selector screen, choose the language.

You are signed in to the Cisco Finesse desktop and your status is set to Not Ready. On clicking the user options on the top right corner, your role (agent or supervisor), agent name, agent ID, extension, and mobile number appear in the drop-down.

Note When you log in to the Finesse desktop for the first time, you are prompted to set your preference for notifications. Choose the option to always receive or allow toaster notifications. Toaster notifications will not appear if your browser is set to private mode that is **New incognito window** in Chrome, or **New private window** in Firefox.

Sign In to Cisco Finesse Desktop Single Sign-On Mode

Cisco Finesse supports custom logon message for Finesse desktop users. For more information on custom messages see the .

Procedure

Step 1 In the address bar of your browser, enter https://FQDN of Finesse Server: 8445/desktop, where FQDN of Finesse Server is the fully qualified domain name of the Cisco Finesse server.

Step 2 If your contact center has installed a language pack for Cisco Finesse, on first sign-in, a **Language Selector** screen appears on the desktop. From the language selector drop-down, choose the language that you want to appear on the desktop. Click **Next**.

Note You can also select a language by passing the locale as part of the URL (for example, https://*FQDN of Primary Server:8445*/desktop?locale=fr_FR) or by changing your browser preferred language. The default language is English (en_US).

If your contact center does not have a language pack installed for Cisco Finesse, the desktop locale is English only.

Step 3 On the IdP page, enter **Username** and **Password**, and click **Sign in**.

Note You must enter the AWDB username.

Step 4 In the **Extension** field, enter your extension and click **Submit**.

You are signed in to the Cisco Finesse desktop and your status is set to Not Ready. On clicking the user options on the top right corner, your role (agent or supervisor), agent name, agent ID, extension, and mobile number appear in the drop-down.

Note On first sign-in, you are prompted to set your preference for notifications. On the sign-in page, Username field is auto populated and disabled. Choose the option to always receive or allow toaster notifications. Toaster notifications will not appear if your browser is set to private mode that is **New incognito window** in Chrome, or **New private window** in Firefox.

Sign In to Finesse Desktop Hybrid Mode

Procedure

Step 1 In the address bar of your browser, enter http://*FQDN of Finesse Server:8445*/finext-desktop.

Where *FQDN of Finesse Server* is the fully qualified domain name of the Finesse server.

Step 2 If your contact center has installed a language pack for Finesse, on first login, a **Language Selector** screen appears on the desktop. From the language selector drop-down, choose the language that you want to appear on the desktop and click **Next**.

Note You can also select a language by passing the locale as part of the URL (for example, http://FQDN of Finesse server/desktop?locale=fr_FR) or by changing your browser preferred language. The default language is English (en_US).

If your contact center does not have a language pack installed for Finesse, the desktop locale is English only.

Step 3 On the login page, enter your **Username** and click **Next**.

Step 4 If the agent is in SSO Mode, the Finesse login page is displayed. Enter your **Extension** and click **Submit**.

If the agent is in Non SSO Mode, enter your **Password** and **Extension**. Click **Sign In**.

Step 5 To change the language that appears on your desktop, click the **Change the Language** link to return to the language selector screen and choose the language.

You are signed into the Cisco Finesse desktop and your status is set to Not Ready. On clicking the user options on the top right corner, your role (agent or supervisor), agent name, agent ID, extension, and mobile number appear in the drop-down.

Note Non SSO users in Hybrid Mode can log in with a different username by clicking the **Sign in as a different user** link. This will direct you to the login page to enter your credentials.

Note On first login, you are prompted to set your preference for notifications. Choose the option to always receive or allow toaster notifications. Notifications may not appear if your browser is set to private mode that is **New incognito window** in Chrome or **New private window** in Firefox.

Sign In Using IPv6

If directed by your administrator, you can sign in to Finesse using an IPv6-only client. In this case, include the appropriate HTTP or HTTPS port in the sign-in URL in Step 1 of the preceding procedure.

- For secure access using HTTPS, enter:

  https://<*FQDN*>:8445/desktop

- For HTTP access, enter:

  http://<*FQDN*>:8082/desktop

The remaining steps of the sign-in procedure remain the same for IPv6.

Account Locked After Five Failed Sign In Attempts

If you try to sign in to Finesse with the wrong password for five times in a row, Finesse blocks access to your account for five minutes. For security reasons, if you try to sign in again during that time, Finesse does not alert you that your account is locked. You must wait five minutes and try again. Do not attempt to sign in again when your account is locked, otherwise the lockout timer resets, and you must wait an additional five minutes.

This restriction applies regardless of how you sign in, be it on the desktop, as a mobile agent, or using the Finesse IP Phone Agent (IPPA).

Sign In as Mobile Agent

When you sign in as a mobile agent, you can use any phone (home phone or mobile phone) that is accessible to the contact center phone system to receive calls.

For more information about using the mobile agent feature, see the *Unified Contact Center Enterprise Features Guide*.

Procedure

Step 1 In the address bar of your browser, enter http://FQDN of Finesse Server: 8445/desktop, where FQDN of Finesse Server is the fully qualified domain name of the Cisco Finesse server.

Step 2 In the **ID**, **password**, and **Extension** fields enter your username or agent ID, password, and extension.

For a mobile agent, the extension represents your virtual extension, also known as the local CTI port (LPC).

Step 3 Check the **Sign in as a Mobile Agent** box.

Step 4 The Mode and Dial Number fields appear. From the Mode drop-down, choose the mode you want to use.

Example:

In Call by Call mode, your phone is dialed for each incoming call and disconnected when the call ends.

In Nailed Connection mode, your phone is called when you sign in and the line stays connected through multiple customer calls.

Step 5 In the Dial Number field, enter your phone number and click **Sign In**.

In Nailed Connection mode, the desktop must receive and answer a setup call before sign-in is complete.

You are signed into the Cisco Finesse desktop and your status is set to Not Ready. On clicking the user options on the top right corner, your role (agent or supervisor), agent name, agent ID, extension, and mobile number appear in the drop-down.

When you select the **Sign in as a Mobile Agent** check box and choose a mode (Call by Call or Nailed Connection), Finesse stores a cookie in your browser that allows the browser to remember these selections. When you access the sign-in page again, the **Sign in as a Mobile Agent** check box and Mode are already selected. These selections persist across sign-ins, browser restarts, and failover scenarios.

However, if you access the alternate Finesse server directly and you have not signed in to this server as a mobile agent before, you must make these selections again.

Accept Security Certificates

Ensure that the pop-ups are enabled for .

After you enter URL in your browser, the procedure to add a certificate is as follows:

Install certificates on Windows operating system:

The procedure to add a certificate varies for each browser. The procedure for each browser is as follows:

Internet Explorer

Note If you are using a Windows client, signed in as a Windows user, you must run Internet Explorer as an administrator to install the security certificates. In your Start menu, right-click Internet Explorer and select Run as administrator.

Contact your administrator if you do not have the required permissions to install the security certificates.

1. A page appears that states there is a problem with the website's security certificate. Click **Continue to this website (not recommended)** link to open sign in page. sign in screen appears with a certificate error in the address bar.
2. Click on the certificate error that appears in the address bar and then click **View Certificates**.
3. In the **Certificate** dialog box, click **Install Certificate** to open the **Certificate Import Wizard**.
4. Select **Current User** to install the certificate for the current user only, or select **Local Machine** to install the certificate for all Windows users.
5. On the **Certificate Import Wizard**, click **Next**.
6. Select **Place all certificates in the following store** and click **Browse**.
7. Select **Trusted Root Certification Authorities** and click **OK**.
8. Click **Next** and then click **Finish**. A **Security Warning** dialog box appears.
9. Click **Yes** to install the certificate. The **Certificate Import** dialog box appears.
10. Click **OK** and close the **Certificate Import** dialog box.
11. Close the browser tab. The accepted certificate link is removed from the **SSL Certificate Not Accepted** dialog box.

Repeat the preceding steps for all the certificate links. After you accept all the certificates, the sign-in process is complete.

Note To remove the certificate error from the desktop, you must close and reopen your browser.

Firefox

1. On **Your connection is not secure** page, click **Advanced** > **Add Exception**.

   Note Ensure that the **Permanently store this exception** box is checked.

2. Click **Confirm Security Exception**.
3. On and click **Sign In**.
4. In the **SSL Certificate Not Accepted** dialog box, click the certificate link. A browser tab opens for the certificate that you must accept.

5. On the browser tab, click **I Understand the Risks** > **Add Exception**. Ensure that the **Permanently store this exception** box is checked.
6. Click **Confirm Security Exception**. The browser tab closes after you accept the certificate and the accepted certificate link is removed from the **SSL Certificate Not Accepted** dialog box. Close the browser tab if it does not automatically close.

Repeat the preceding steps for all the certificate links. After you accept all the certificates, the sign-in process is complete.

Chrome and Edge Chromium (Microsoft Edge)

1. A page appears that states your connection is not private. To open sign in page,

   In Chrome, click **Advanced** > **Proceed to <Hostname> (unsafe)**.

   In Microsoft Edge, click **Advanced** > **Continue to <Hostname> (unsafe)**.
2. Enter your agent ID or username, password, and extension, and then click **Sign In**.
3. In the **SSL Certificate Not Accepted** dialog box, click the certificate link. A browser tab opens for the certificate that you must accept.
4. On the browser tab,

   In Chrome, click **Advanced** > **Proceed to <Hostname> (unsafe)**.

   In Microsoft Edge, click **Advanced** > **Continue to <Hostname> (unsafe)**.

   The browser tab closes after you accept the certificate and the accepted certificate link is removed from the **SSL Certificate Not Accepted** dialog box. Close the browser tab if it does not automatically close.

Note If you click the certificate link and do not accept it, the certificate link stays enabled in the **SSL Certificate Not Accepted** dialog box. The certificate error appears every time you sign in. The procedure to permanently accept the certificate is as follows.

5. Click on the certificate error that appears in the address bar and then,

   In Chrome, select **Certificate (Invalid)**.

   In Microsoft Edge, select **Certificate (not valid)**.

   The **Certificate** dialog box appears.
6. In the **Details** tab, click **Copy to File**. The **Certificate Export Wizard** appears.
7. Click **Next**.
8. Keep the default selection **DER encoded binary X.509 (.CER)** and click **Next**.
9. Click **Browse** and select the folder in which you want to save the certificate, enter a recognizable file name and click **Save**.
10. Browse to the folder where you have saved the certificate (**.cer** file), right-click on the file, and click **Install Certificate**. The **Certificate Import Wizard** appears.
11. Keep the default selection **Current User** and click **Next**.

12. Select **Place all certificates in the following store** and click **Browse**. The **Select Certificate Store** dialog box appears.
13. Select **Trusted Root Certification Authorities** and click **OK**.
14. Click **Next** and then click **Finish**. A **Security Warning** dialog box appears that asks if you want to install the certificate.
15. Click **Yes**. A **Certificate Import** dialog box that states the import was successful appears.

Close the browser and sign in to . The security error does not appear in the address bar.

Install certificates on macOS:

The procedure to download a certificate varies for each browser. The procedure for each browser is as follows:

Chrome and Edge Chromium (Microsoft Edge)

1. A warning page appears which states that your connection is not private. To open sign in page,

   In Chrome, click **Advanced** > **Proceed to <Hostname> (unsafe)**.

   In Microsoft Edge, click **Advanced** > **Continue to <Hostname> (unsafe)**.
2. Click on the certificate error that appears in the address bar and then,

   In Chrome, select **Certificate (Invalid)**.

   In Microsoft Edge, select **Certificate (Not Valid)**.

   A certificate dialog box appears with the certificate details.
3. Drag the **Certificate** icon to the desktop.
4. Double-click the certificate. The **Keychain Access** application opens.
5. In the right pane of Keychains dialog, browse to the certificate, right-click on the certificate, and select **Get Info** from the options that are listed. A dialog appears with more information about the certificate.
6. Expand **Trust**. From the **When using this certificate** drop-down, select **Always Trust**.
7. Close the dialog box that has more information about the certificate. A confirmation dialog box appears.
8. Authenticate the modification of Keychains by providing a password.
9. The certificate is now trusted, and the certificate error does not appear on the address bar.

Firefox

1. In your Firefox browser, enter URL. A warning page appears which states that there is a security risk.
2. Click **Advanced** and then click **View Certificate** link. The **Certificate Viewer** dialog box appears.
3. Click **Details** and then click **Export**. Save the certificate (**.crt** file) in a local folder.

Note If **.crt** file option is not available, select **.der** option to save the certificate.

4. From the menu, select **Firefox** > **Preferences**. The **Preferences** page is displayed.

5. In the left pane, select **Privacy & Security**.
6. Scroll to the **Certificates** section and click **View Certificates ...**. The **Certificate Manager** window is displayed.
7. Click **Import** and select the certificate.
8. The certificate is now authorized, and the certificate error does not appear on the address bar.

Accept Certificates for Live Data Gadget

The Cisco Unified Intelligence Center Live Data gadget provides reports that you can view in the Finesse desktop. If your desktop contains these reports, the first time you sign in, you may be prompted to accept security certificates.

Procedure

Step 1 Sign in to the Finesse desktop.

The Cisco Unified Intelligence Center Live Data gadget displays a message that states Finesse is checking for connectivity. If Finesse detects any security certificates that must be accepted, a message appears that lists the certificates that you must accept to use Cisco Unified Intelligence Center.

Note Each Cisco Unified Intelligence Center report displays this message.

Step 2 Click **OK**.

A new browser tab (or window, depending on your browser settings) opens for each certificate that you need to accept. The message in the gadget changes to state that to continue, accept the certificates in the opened tabs.

Step 3 If you use Internet Explorer:

a) Click **Certificate error** > **View Certificates** to open the Certificate dialog box.

b) On the Certificate dialog box, click **Install Certificate** to open the Certificate Import Wizard.

If you are using Internet Explorer 11 with Windows 10, the Install Certificate option does not appear until you add Finesse to your trusted sites.

1. From the browser menu, select **Internet Options**.
2. On the **Security** tab, click **Trusted Sites** > **Sites**.
3. In the **Add this website to the zone** field, enter the URL for the Finesse desktop and click **Add**.
4. After you click **Install Certificate**, under **Store Location**, select **Current User** to install the certificate for the current user only, or select **Local Machine** to install the certificate for all Windows users on that computer.

   If you select **Local Machine**, a dialog box appears that asks if you want to allow Windows host process to make changes to this computer. Select **Yes**.

c) On the Certificate Import Wizard, click **Next**.

d) Select **Place all certificates in the following store** and click **Browse**.

e) Select **Trusted Root Certification Authorities** and click **OK**.
f) Click **Next**.
g) Click **Finish**.
h) On the Security Warning dialog box, click **Yes** to install the certificate.
i) On the Certificate Import dialog box, click **OK**.
j) Click **OK** on the Certificate dialog box.
k) Close the browser tab. Repeat the preceding steps until all certificates are accepted.

After the browser tabs are closed, the Cisco Unified Intelligence Center Live Data gadget reloads.

Step 4 To accept the certificates in Microsoft Edge:

a) In certificate error browser tab, click **Certificate error** > **View Certificates** to open the certificate information.
b) In the **Certificate Information** column, click **Export to file**, browser to any location on your computer and save the certificate.
c) From **Start**, search and open the **Manage user certificates** tool.
d) In **Manage user certificates**, under **Certificates - Local Computer**, right-click **Trusted Root Certification Authorities** and click **All Tasks** > **Import**.
e) In the **Certificate Import Wizard**, click **Next**.
f) Click **Browse**, navigate to the location where you exported the certificate, select the certificate, and click **Open**.
g) In the **Certificate Import Wizard**, click **Next** > **Next** > **Finish**.
h) In the **Certificate Import Wizard** dialog box, click **OK**.
i) After the browser tabs are closed, the Cisco Unified Intelligence Center Live Data gadget reloads.

Step 5 If you use Firefox:

a) In each tab, click **I Understand the Risks** and click **Add Exception**.
b) Ensure the **Permanently store this exception** box is checked.
c) Click **Confirm Security Exception**.
After the browser tabs are closed, the Cisco Unified Intelligence Center Live Data gadget reloads.

Step 6 To accept the certificates in Chrome:

a) In **Your connection is not private** page, click **Advanced** > **Proceed to** *CUIC FQDN*.

After the browser tabs are closed, the Cisco Unified Intelligence Center Live Data gadget reloads.

Sign Out of the Finesse Desktop

Important Do not close your browser to sign out of the Finesse desktop. Finesse can take up to 120 seconds to detect that your browser is closed and an additional 60 seconds to sign you out. Finesse may continue to route contacts to you during this time.

You cannot sign out of the Finesse desktop when your Voice or Digital Channels are in the Ready state.

Procedure

Step 1 Ensure your state is set to Not Ready. Click the user options icon on the top-right corner of your screen. The Sign Out option is displayed with a drop-down list of Sign Out reason codes.

Step 2 Select the appropriate Sign Out reason code to sign out.

Note If no Sign Out reason codes are configured for your team, Finesse signs you out when you click **Sign Out**.

Step 3 On the **Sign Out** screen, you can choose to exit the browser or click the **Sign In** link to be redirected to the Finesse login screen.

Change Your State

When you sign in to Cisco Finesse desktop, by default your state is set to Not Ready. This is applicable to both voice and digital channels.

You can set your state to Ready or you can choose from one of the configured Not Ready reasons.

While you are on a call, chat or replying to an email, you can select and apply a state when you complete the task.

Change Your State for Voice Channels

When you sign in to Cisco Finesse desktop, by default your state is set to Not Ready. To accept incoming call, you must set your state to Ready.

When you answer a call, you can change your state after you complete the call. If Wrap-Up is required, when a call ends you transition to Wrap-Up state. While in Wrap-Up state, you can complete any after call work. If Wrap-Up is optional, you can select Wrap-Up while on call to transition to Wrap-Up state when the call ends.

To end the Wrap-Up state, you must select your new state from the drop-down or wait for the preconfigured timer to expire.

Procedure

Step 1 Click the drop-down besides your current state.

Step 2 Select the appropriate state from the list.

Your agent state changes to reflect your new selected state. If you select change of state while you are still on call, the state change will reflect after you complete the call.

Change Your State for All Digital Channels

When you sign in to Cisco Finesse desktop, the default state will be Not Ready for all digital channels. However, for individual digital channels, the default state reflected is as per registration for that particular channel.

Note You can register and configure upto four digital channels for Unified CCE deployment.

To change state for all digital channels:

Procedure

Step 1 Click the drop-down beside your current state.

Step 2 Select Ready state from the list.

For all the digital channels, your selected state change is displayed as Ready.

What to do next

Proceed to change the state for your individual registered digital channels.

Change Your State for Individual Digital Channels

You can change the state for individual digital channels that you have configured and registered.

Procedure

Step 1 Click on the drop-down beside the configured channel.

Step 2 Select the required state from the list.

The change of state for the individual digital channels is reflected as a color change on the icon. For example, to indicate the state change, if you have registered Available and Not Available as the terminologies for **Chat** channel, and you select Available as your state, the **Chat** icon changes to green and if you select Non Available the **Chat** icon changes to Red.

Popover Notifications for Digital Channels

When you receive a request for chat, email, or any digital channels that you have registered and configured, a popover notification is displayed on the Finesse desktop. Click **Accept** to accept the request or **Reject** to reject the request.

Note If you do not accept the request, the popover notification fades away. The duration of the notification is configured by the administrator.

Make a Call

Your status must be Ready or Not Ready to make an outgoing call.

Note Finesse supports the use of any ASCII character when you make a call. Finesse converts letters typed into the dial pad into numbers. It does not remove non-numeric characters (including parentheses and hyphens) from phone numbers. All alphabetical and special characters from the phone numbers including **#**, *****, **+**, and **:** is supported.

Procedure

Step 1 Click the dialpad icon on the Cisco Finesse desktop.

The dialer dialog containing the keypad and a list of phone contacts is displayed. Your administrator assigns the phone contacts.

Step 2 Click the contact from the list or manually enter the number into the dialpad to make a call.

Note Enter text in the search field to search the list of contacts. To edit the number before making a call, click the edit icon next to the contact to populate the dialpad with the phone number.

Step 3 To end the call, click **End**.

Answer a Call

You must be in Ready state to be available for customer calls. When a call arrives at the desktop, your state automatically changes to Reserved. A popover notification with configured customer details is displayed with the **Answer** button.

Note You can receive a direct call from another agent while you are in Not Ready or Ready state.

Procedure

Step 1 Sign in to the Finesse desktop using the URL: `https://FQDN of Finesse Server:8445/desktop`.

Step 2 Click **Answer** in the notification popover.

Your state changes to Talking. You are connected to the caller. The configured call variables are displayed in the call control area and can be maximized or minimized, if required. This can be done by toggling the maximize/minimize arrow or clicking on call control. If a second call arrives on the desktop, the original call's call variables display is minimized.

Step 3 To end the call, click **End**.

Your state changes to Ready and you are available for the next incoming call.

To be in Not Ready state when the call ends, click the drop-down arrow beside your state while you are on the call and choose Not Ready or Not Ready with the appropriate reason code. Your state changes to Talking->Not Ready (Pending). After the call ends, your state changes to Not Ready.

Answer an Outbound Option Preview Call

An Outbound Option Preview call allows you to view a customer's contact information before you choose to accept or decline the call.

Procedure

Step 1 Ensure your state is set to Ready to receive a call.

The Outbound Option Preview call arrives at the desktop as a popover with the **Accept** and **Decline** buttons.Your state changes to Reserved (Outbound). The Call Control gadget expands to show customer information.

Step 2 After you review the information, click **Accept** to accept the call or click **Decline** to decline the call.

If you accept the call, the system places the call to the customer. If the attempt succeeds, you are connected to the customer. If the attempt fails, the reservation call disappears and Finesse places you in the Ready state.

If you decline the call, you must choose to reject or close the contact. If you click **Reject**, the contact remains in the campaign to be retried at a later time. If you click **Close**, the contact is closed for the duration of the campaign.

Answer a Direct Preview Outbound Call

A Direct Preview Outbound call allows you to view a customer's contact information before you choose to accept or decline the call.

Procedure

Step 1 Ensure your state is set to Ready to receive a call.

A Direct Preview Outbound call arrives at the desktop as a popover which has **Accept** and **Decline** buttons. Your state changes to Reserved (Outbound). The Call Control gadget expands to show customer information.

Step 2 After you review the information, click **Accept** to accept the call or click **Decline** to decline the call.

If you accept the call, the system places the call to the customer directly from your phone. If the attempt succeeds, you are connected to the customer. If the attempt fails, Finesse places you in Ready state.

If you decline the call, you must choose to reject or close the contact. If you click **Reject**, the contact remains in the campaign to be retried at a later time. If you click **Close**, the contact is closed for the duration of the campaign.

Reclassify a Direct Preview Outbound Call

The Reclassify button allows you to reclassify a Direct Preview Outbound call as Answering Machine, Fax, Invalid Number, or Voice. By default, a call is classified as Voice. This button is available after you accept the Direct Preview call and remains for the life of the call. This also available while you are in the Wrap-Up state. You can reclassify a call multiple times.

Procedure

Step 1 Answer a Direct Preview Outbound call.

Step 2 Listen to the call. If you determine the number called is busy, an answering machine, a fax, or an invalid number, click **Reclassify**.

Step 3 Choose the appropriate option from the resulting drop-down.

Step 4 To end the call, click **End**.

Schedule a Callback

If you are on an Outbound Dialer call and the customer wants to be called back at a later time, you can schedule a callback.

Procedure

Step 1 While you are on the call, click **Callback**.

The Callback dialog box appears. The Current Time field contains the current time in the customer's time zone (this field is read-only). The Phone Number field contains the phone number that was dialed for this call.

Step 2 If the customer prefers to be called back at a different phone number, enter the new phone number in the Phone Number field.

Step 3 In the Date and Time fields, enter the date and time to call the customer. Type the date and time in to the respective fields or choose the date and time from the displayed calendar.

You must enter the time in the customer's location (not the time in your location).

You can toggle between AM or PM and click **Enter**.

Note The time corresponds to the customer's time zone. Finesse uses the customer's area code to determine the time zone. A customer using a mobile phone may not be in the time zone that matches the area code of the phone. Therefore, you should confirm the time zone with the customer.

Step 4 Click **Schedule**.

Step 5 If you need to update the information after you schedule a callback, click **Callback** to re-open the Callback dialog box.

Step 6 Update the necessary fields and click **Update**.

Step 7 If you need to cancel the callback after you schedule it, click **Callback** to re-open the Callback dialog box.

Step 8 Click **Cancel**.

A message is displayed confirming that the callback has been canceled.

Answer an Outbound Option Personal Callback Call

When you are on an Outbound Option call, you can schedule a customer callback at a more convenient time. Scheduled callbacks can be personal or regular, depending on the configuration of your contact center. Regular callbacks appear on your desktop in the same Outbound Option mode as the original call (for example, if the original call was a Preview call, the callback call is a Preview call).

Personal callbacks are similar to Outbound Option Preview calls but the buttons on the desktop are slightly different.

Procedure

Step 1 Ensure your state is set to Ready to receive a call.

When an Outbound Option Personal Callback call arrives at the desktop, your state changes to Reserved (Outbound). The Call Control gadget expands to show customer information.

Step 2 After you review the information, click **Accept** to accept the call or click **Decline**, and then click **Close**.

If you accept the call, the system places the call to the customer. If the attempt succeeds, you are connected to the customer. If the attempt fails, the reservation call disappears and Finesse places you in Ready state.

If you decline the call, the contact is closed for the duration of the campaign.

Initiate a Consult Call

You must be on an active call to initiate a consult call.

Procedure

Step 1 Click **Consult**.

The dialer dialog containing the keypad and a list of phone contacts is displayed.

Step 2 Choose the contact you want to consult from the list of contacts or enter the number into the dialpad.

Step 3 On the dialpad, click **Call**.

The customer call is placed on hold and you are connected to the contact that you called.

Step 4 After you consult with the contact that you called, you can choose to end the consult call and retrieve the customer call, conference the customer into the consult call, or transfer the customer to the agent or supervisor that you consulted.

Option	Description
To end the consult call and retrieve the customer call	Click **End** on the consult call and click **Retrieve** on the customer call.
To place the other agent or supervisor on hold and go back to the customer	Click **Retrieve** on the customer call. Click **Retrieve** on the consult call to place the customer on hold and go back to the other agent or supervisor.
To conference the customer into the consult call	Click **Conference**. If you want to leave the conference, click **End**.
To transfer the customer to the agent or supervisor you are consulting with	Click **Transfer**.

Transfer a Call (Single-Step Transfer)

This feature allows you to transfer a call without first initiating a consult call.

Note You must be in Talking state to initiate a transfer. If you put the call on hold, the Transfer button disappears.

Procedure

Step 1 Click **Direct Transfer**.

The dialer dialog containing the keypad and a list of phone contacts is displayed.

Note Your administrator assigns your phone contacts.

Step 2 Choose a contact from the list or enter the number you want to call into the dialpad.

Note Enter text in the search field to search the list of contacts or select a contact to populate the dialpad with the phone number.

Step 3 On the dialer dialog, click **Direct Transfer**.

The call disappears from your desktop. You are now ready for the next call.

Send DTMF

Use this feature to send a string of dual-tone multifrequency (DTMF) digits during a call. For example, you can use this feature to interact with an interactive voice response (IVR) system to enter an account number or a password.

Note You must be on an active call to use this feature.

Procedure

Step 1 Click **Keypad**.

The dialer dialog containing the keypad and a list of phone contacts are displayed.

Step 2 Click the appropriate buttons on the dialpad to enter the DTMF digits.

You can send the following characters as part of a DTMF string:

- 0-9
- pound sign (#)
- asterisk (*)

The characters appear in the text field above the dialpad (this text field is read-only).

Note You can use the dialpad to enter the DTMF digits. You cannot type the DTMF digits using your keyboard.

Step 3 Click **Keypad** again or click anywhere outside to close the dialpad.

Desktop Chat

Desktop Chat interface is hosted by the Finesse browser desktop and requires a separate login. This feature provides chat functionalities required for agents and supervisors to chat with each other or with other Subject Matter Experts in the organization. Desktop Chat is available on your Finesse desktop only if the administrator has configured this feature for you.

If Cisco IM and Presence is configured with certificate which are not automatically trusted by browsers, user will be prompted to accept security certificate during sign in to the Finesse desktop. To avoid the prompts to accept certificate appearing every time, user must add the certificate to the browser trust store, or configure IM and Presence with CA-signed certificate, or push self-signed certificate through group policies in supported browsers. For more information, see *Accept Security Certificates*.

Note The supported format for Cisco IM and Presence EC certificate is imphostname-EC.domain.com.

Desktop Chat users are identified with a unique identity which is in the form of username@FQDN.com.

The agent state in the Desktop Chat is separate from the Voice or Digital Channels state and can be controlled by the user.

The Desktop Chat state is reflected in the user's combined presence. For example, If you are logging into Desktop Chat, you are seen as available in Jabber or other connected chat tools.

While accepting the Desktop Chat certificates, if you accept one certificate and skip the rest, you will lose your Desktop Chat status during a failover. Ensure to accept all certificates to preserve the Desktop Chat login and status after a failover. Depending on the failover type, you may either lose or retain all your Desktop chat sessions.

Note Desktop Chat does not support Single Sign-On. It requires an explicit login for both SSO and non SSO platforms.

Sign In to Desktop Chat

Procedure

Step 1 In the Finesse desktop, click the Desktop Chat icon ( ).

Step 2 Enter your username and password in the appropriate fields and click **Sign In**.

Step 3 **Note** If you are using self-signed certificates, you get the certificate acceptance window.

Click the certificate link. A new browser tab opens for the certificate that you must accept. A certificate error appears in the address bar.

- To accept the certificates in Internet Explorer, refer to the section *Accept Security Certificates > Step 2 > Substep d* onward.

- To accept the certificates in Firefox, refer to the section *Accept Security Certificates* > *Step 4* onwards.
- To accept the certificates in Chrome and Edge Chromium, refer to the section *Accept Security Certificates* > *Step 5* onwards.

Note The **Accept Security Certificates** topic is in the *Cisco Finesse Agent and Supervisor Desktop User Guide for Cisco Unified Contact Center Express*.

Add Contact

If you have Cisco Jabber on your desktop, then the first time you sign in to Desktop Chat, you will see your Cisco Jabber contact list in the Desktop Chat window. If you do not have Cisco Jabber, your contact list will be empty.

Procedure

Step 1 To add a contact:

- In the empty contact list, enter the agent name or ID in the **Search** field.

  Note When you enter the text to search, the Search field pre populates relevant results in a drop-down. From the results list, hover over the required contact and click the icon.

- In the existing contact list, click the icon at the end of the group and click **Add**.
- From the **Recent Chats** group, click the icon at the end of the required chat and click **Add**.

Step 2 In the **Add Contact** window, you can choose to change the display name.

Step 3 From the **Add to Group** drop-down, either choose an existing group or create a new group to add the contact.

Step 4 Click **Add**.
The contact is added to your existing or newly created group.

Edit Contact

Use this option to change the contact name or contact group.

Procedure

Step 1 In the Contact list, click the icon at the end of the required contact.

Step 2 From the drop-down, click **Edit**.

Step 3 In the **Edit Contact** window, modify the display name or the group.

While modifying the group for the contact, you can either add the contact to existing groups or create a new group.

Step 4 Click **Save**.

Move Contact

Use this option to move a contact to a different group.

Procedure

Step 1 To move a single Contact:

a) Click the ••• icon at the end of the required contact.
b) From the drop-down, click **Move**.
c) In the **Select Destination** window, select an existing group or create a new group.
d) Click **Move**.

Step 2 To move multiple contacts:

a) Press and hold the **Ctrl** key and select the required contacts.
b) On the Contact list header, click **Move**.
c) In the **Select Destination** window, select existing groups or create a new group.
d) Click **Move**.

Delete Contact

Use this option to delete a contact. If the contact is part of multiple groups, it is removed only from that group and not from the other groups.

Procedure

Step 1 To delete a single contact:

a) In the Contact list, click the ••• icon at the end of the required contact.
b) From the drop-down, click **Delete**.
c) In the confirmation prompt, click **Delete** to remove the contact from that group.

Step 2 To delete multiple contacts:

a) Press and hold the **Ctrl** key and select the required contacts.
b) On the Contact list header, click **Delete**.
c) In the confirmation prompt, click **Delete** to remove the contact from that group.

Edit Group

Use this option to change the group name.

Procedure

Step 1 In the contact list, click the ••• icon at the end of the required group.

Step 2 From the drop-down list, click **Edit**.

Step 3 In the **Group** window, modify the group name.

Step 4 Click **Save**.

Delete Group

Use this option to delete a group.

Procedure

Step 1 In the Contact list, click the ••• icon at the end of the required group.

Step 2 From the drop-down, click **Delete**.

Step 3 In the confirmation prompt, click **Delete**.
The group is removed with all the contacts in it.

Chat Window

When you receive an incoming chat request, a chat window pops up with the display name of the agent in the chat window header. If the Cisco Finesse desktop window or tab is inactive, Finesse displays a notification with the chat details. Click the toaster notification to restore the Cisco Finesse desktop.

You can move the chat window to any location on the screen but cannot maximize it to the full screen.

Note You can chat with agents logged in to the Desktop Chat. You cannot send messages to the signed out agents.

The Desktop Chat window provides the following functionalities:

- Typing area: Type your message in the typing area. Right-click to perform basic clipboard operations.
- The typing awareness indicator shows when the other participant is typing.
- Multiple chats:
  - All agents are displayed in the chat tabs at the bottom of the chat window.
  - The chat tab area displays up to three active chats. To view more than three active chats, click the » icon.
  - For each chat tab, the unread chat notification is shown in a badge next to the display name. The badge disappears when that chat tab is active.

- When you hover over the status on any chat tab next to the display name, you get the option to close that chat tab.

- Click the chat window header to minimize or maximize the chat window.
  - When minimized, the chat window header shows the total number of chats that have unread messages.
  - Click **X** on the chat window header and confirm to close all chats.

- Chat history: The Desktop Chat window stores the chat history only for a particular session. If you sign out or the browser is refreshed or closed, the chat history is lost.

- Resize chat window: Click the button on the chat window header to increase the chat window frame size and the button to restore the frame size.

- Attachments:

Note The administrator should have enabled attachment support for you to send and receive attachments.

- To send an attachment:
  1. Click the **Send a file** button and navigate to the file you want to send.
  2. Click **OK**.

- When you receive an attachment, you are prompted to Accept and Decline the attachment. Click **Accept** to download the attachment or click **Decline** to reject it.
  - The file name and file size are displayed in the attachment header.
  - The attachments are downloaded in the downloads folder of the browser.
  - You cannot open the attachment from the chat window.
  - The supported file types and maximum attachment size are configured by your administrator.

Note You can send or receive attachments only from the users using Desktop Chat.

Change Your Desktop Chat State

When you sign in to the Desktop Chat, your state is set to Available by default. To change your state:

Procedure

Step 1 Click the drop-down arrow beside your current state in the Desktop Chat window.

Step 2 Choose the appropriate state from the list.

Note If your status in set to Do Not Disturb and you receive a chat message, the message is displayed only if your chat window is active. If the chat window is closed or minimized, the Desktop Chat icon blinks and you will only see the minimized chat window header with the number of chat tabs that have unread messages.

Sign Out of Desktop Chat

When you sign out of the Desktop Chat, you will only be signed out from the Desktop Chat and not the Voice or Digital channels. Your Voice and Digital Channels state remains the same. To sign out:

Procedure

Step 1 Click the drop-down arrow beside your current state in the Desktop Chat window

Step 2 From the displayed list, click **Sign Out**.

Apply Wrap-Up Reason

Wrap-up reasons can be applied on all Inbound calls routed to the Contact Center and on all the Contact Center triggered outbound campaign calls only. If your administrator has assigned wrap-up reasons to you, the Wrap-Up Reason button appears when you are on a call or when you are in Wrap-Up state after a call (if you are configured for Wrap-Up).

If you do not have any Wrap-Up Reasons assigned to you, you will not have this feature on your desktop. Your administrator creates and assigns Wrap-Up Reasons.

Note Wrap-Up Reasons are set on per call basis. This means if you apply a wrap-up reason for a call, the same will be reflected on desktops of all other participants (agents) of the call.

You can enter a Wrap-Up Reason during a call or while you are in Wrap-Up state after the call ends (this includes call termination as well as transfer and conference drop scenarios). If Wrap-Up is required, you automatically transition to Wrap-Up state when the call ends. If wrap-up is optional, you can select Wrap-Up from the agent state drop-down during the call. Your state then appears as Talking -> Wrap-Up (Pending) for the duration of the call. When the call ends, you transition to Wrap-Up state and can complete any after call work.

If you want to specify what state to enter when the wrap-up timer expires, you can select the state from the drop-down before you select Wrap-Up. For example, while on a call, select Not Ready from the drop-down. Then select Wrap-Up.

To end Wrap-Up state, select your new state (Ready or Not Ready) from the drop-down or wait for the preconfigured timer to expire.

Note Once you enter a Wrap-Up state no further call updates will be made in the call control gadget. However, if you enter a wrap-up reason for the call while in wrap-up state, the call control gadget will be updated with the new wrap-up reason only; all other call information will remain as they were prior to entering the wrap-up state.

Procedure

Step 1 Click **Wrap-Up**.

Step 2 You can either select the appropriate reason by scrolling through the drop-down or use the provided search field in the Wrap-Up drop-down.

Step 3 Click **Apply**.

A check icon appears on top of the **Wrap-Up** button to indicate that Finesse successfully applied the Wrap-Up reason. The Wrap-Up reason that is applied is displayed as a tag just below the search field in the Wrap-Up popover.

Note You can change the Wrap-Up reason during the call. If you decide you want to use a different Wrap-Up reason, click the **Wrap-Up** button again, select a new Wrap-Up reason, and click **Apply**.

If you want to cancel the Wrap-Up reason, click **Cancel** to close the Wrap-Up popover.

Force Wrap-Up

If your administrator has assigned wrap-up reasons and you wish to change your state from wrap-up to any other state, a tooltip with the message **Select Wrap-Up Reason** is displayed. You cannot change your state unless the wrap-up reason is applied, or your timer expires and your state is changed automatically.

The wrap-up timer is applicable when administrator has set the wrap-up time for the CSQ. When agents end a call, the wrap-up timer starts the countdown and agents are required to wrap-up before the timer reaches zero.

For Example, if the timer is set to 30 seconds, the timer starts from 30 and ends on zero.

The wrap-up timer is displayed below the state.

View My History

Use the **My History** tab on the Agent or Supervisor desktop to view your recent call history and state history.

Recent Call History

Click the **My History** tab on the desktop, you can view the following details of your calls since the last time you logged in:

- **Type**: Indicates if the call was an Inbound or Outbound call.
- **Number**: Indicates the phone number of the call.
- **Disposition**: Indicates the action taken for the call.
- **Wrap-Up Reason**: Indicates the call reason category.
- **Queue**: Indicates the queue associated with the call.
- **Start-Time**: Indicates the start time of the call.
- **Duration**: Indicates the duration of the call.
  - For Inbound calls it includes the ring time, talk time, and hold time.
  - For Outbound calls it includes dial tone, ring back, talk time, and hold time.
- **Make Call**: Click on the call icon to initiate an outgoing call when in Ready or Not Ready state.

Recent State History

Click the **My History** tab on the desktop, you can view the following details of your call state history since the last time you logged in:

- **Start Time**: Indicates the time when agent state was initiated.
- **State**: Indicates the ACD agent state.
- **Reason**: Indicates the reason for the current agent state.
- **Duration**: Indicates the duration of the agent state.

View Multiple Live Data Report Views

Cisco Unified Intelligence Center allows you to view multiple Live Data reports or views on a single gadget. You can select the desired view to display from a drop-down on the gadget toolbar, which lists up to five report views in *Report Name - View Name* format. Your administrator determines which views are available for you to select.

From the Live Data report toolbar, you can:

- Pause and resume event updates in the Live Data gadget using the **Pause and Play** button. (If the button is paused when there are updates available on the gadget, a notification appears over the button.)
- Hide and restore the toolbar using the arrow in the center of the toolbar.
- Access help for the relevant reporting gadgets by clicking the help button.

View Context Service Data

Cisco Context Service is a cloud-based omnichannel solution for Cisco Unified CCE. It enables you to capture the customer's interaction history by providing flexible storage of customer-interaction data across any channel.

For more information about Context Service and to check service availability, see https://help.webex.com/community/context-service.

Procedure

Step 1 To view the Context Service gadget, click the **Manage Customer** tab.

Step 2 For information about how to use the Context Service, see the instructions provided in the gadget.

View Team Message

On logging in to the Finesse desktop, you can view the Team Message banner which broadcasts the active team updates sent by your supervisor in real-time. The total number of active messages sent by your supervisor is displayed in the banner. By clicking the number, you can view the latest message with the name of the supervisor and the timestamp being displayed against each message.

You can toggle between the active messages (note that messages expire after a time frame, as set by the Supervisor).

If the Finesse desktop is inactive, a toaster notification appears when a new team message is sent by the Supervisor. You can click the notification to view the message.

Note During failover, the team message banner and the failover banner will be displayed together.

Send Error Report

If you experience problems with the Finesse desktop, you can send a set of desktop logs to your administrator.

Procedure

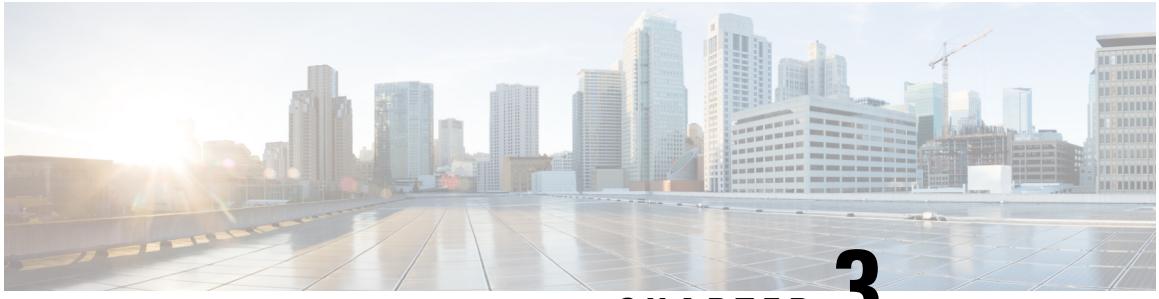
Step 1 To send desktop logs to the administrator, click the user options on the top-right corner of your screen.

Step 2 Select the **Send Error Report** option from the drop-down.

After Finesse desktop submits the logs, the Send Error Report option changes to display the **Successfully Sent** confirmation message.

The Send Error Report option reappears after the Finesse desktop submits the logs.

Note If your browser freezes or crashes before you can click the Send Error Report option and you need to restart your browser, do not click the Send Error Report option right away. After a browser restart, the logs are no longer available. You must wait until the desktop starts to exhibit the problem again and then select the option.



CHAPTER 3

Supervisor Tasks

This chapter describes the tasks that supervisors perform.

View Team Performance

Use the Team Performance gadget to view the agents on each of your assigned teams.

Procedure

Step 1 In the Team Performance gadget, you can view the details of the team selected by default in the **Team Name** drop-down.

A list of agents for the selected team with their current state, time in state, extension, and action appears. Click the headers of the columns to sort by Agent Name, State, Time in State, or Extension.

Note For the Time in State to appear for logged out and Not Ready agents, the agent state must have changed at least once post server restart.

By default, the list will only contain logged in agents for the selected team. To view both, logged in and logged out agents, check the **Include logged out agents** check box.

Select an agent and in the corresponding row, click ••• under the **Actions** tab to monitor the agent, change the state to Ready, Not Ready, or Sign Out the agent.

Note The Time in State field refreshes every 10 seconds. When Finesse receives the next agent state change event for an agent, the timer resets to 0.

Step 2 To view another team, click the **Team Name** drop-down and choose a new team.

View Active Call Details

If the Administrator has configured the active call details for you, use the Team Performance gadget to view the active call details of an agent of your assigned team.

Procedure

Step 1 From the **Team Name** drop-down, choose the agent's team.

Step 2 From the displayed list, choose an agent in the Talking state.

Step 3 In the **Actions** tab of the selected agent, click the down arrow.

The following call details are displayed:

- The popover call variable header and the call variables configured by the administrator.
- **Active Participants**: The phone numbers of the active participants in the call.
- **Held Participants**: The phone numbers of the held participants in the call. The Held Participants information is not available for unmonitored devices. For example, customer or external devices.

  Note Active Participants and Held Participants lists do not contain the expanded agent number, it contains only other participants in the call.

- **Duration**: The duration of the call.
- **Call Status**: The current status of the call. Indicates the status of the expanded agent in the call.
- **Queue Name**: The customer service queue to which the call belongs to.

View Recent Call History

If the Administrator has configured view history for you, use the Team Performance gadget to view the call history of an agent of your assigned team.

Procedure

Step 1 From the **Team Name** drop-down, choose the agent's team.

Step 2 From the displayed list, choose any agent. The list contains all logged in agents for the selected team. To view logged in and logged out agents, check the **Include logged out agents** checkbox.

Step 3 In the **Actions** tab of the selected agent, click ••• > **View History**.

The following call details of the selected agent's **Recent Call History** are displayed:

- **Start Time**: Indicates the start time of the call.
- **Duration**: Indicates the call duration.
- **Type**: Indicates if the call was an Inbound or Outbound.
- **Number**: Indicates the phone number of the call.
- **Disposition**: Indicates the action taken on the call.
- **Queue**: Indicates the name of the queue assigned to the agent.
- **Wrap-Up Reason**: Indicates the Wrap-Up Reason selected by the agent.

Note You cannot select any other agent or choose another team while the recent call history of the selected agent is being loaded. However, you may change an agent's state or monitor an agent's call during this time-frame.

Note To navigate back to the Team Performance gadget view, click on the left arrow next to the **View Recent Call History** header.

View Recent State History

If the Administrator has configured view history for you, use the Team Performance gadget to view the state history of an agent of your assigned team.

Procedure

Step 1 From the **Team Name** drop-down, choose the agent's team.

Step 2 From the displayed list, choose any agent. The list contains all logged in agents for the selected team. To view logged in and logged out agents, check the **Include logged out agents** checkbox.

Step 3 In the **Actions** tab of the selected agent, click ••• > **View History**.

The following details of the selected agent's **Recent State History** are displayed:

- **Start Time**: Indicates the start time of the call.
- **State**: Indicates the agent state. In the Team Performance gadget, when an agent state changes to Wrap-Up, the corresponding state in the Recent State History gadget will display as **WORK_READY**.
- **Reason**: Indicates the wrap-up reason of the call.
- **Duration**: Indicates the call duration.

Note You cannot select any other agent or choose another team while the recent state history of the selected agent is being loaded. However, you may change an agent's state or monitor an agent's call during this time-frame.

Note To navigate back to the Team Performance gadget view, click on the left arrow next to the **View Recent State History** header.

Change the State of an Agent

Use the Team Performance gadget to change the state of an agent to Ready, Not Ready, or Sign Out.

Procedure

Step 1 From the **Team Name** drop-down list, choose the agent's team.

Step 2 From the displayed list, choose the agent whose state you want to change.

Step 3 In the **Actions** tab of the selected agent, click ••• and choose:

Ready	To force the agent state to Ready.
Not Ready	To force the agent state to Not Ready.
Sign Out	To sign the agent out.

In the **Actions** tab, the Ready, Not Ready, and Sign Out options are active only if the action is allowed.

For example, if you select an agent who is in Ready state, you will see only the Not Ready and Sign Out options. If you select an agent who is in Not Ready state, you will see only the Ready and Sign Out options.

If you sign out an agent on an active call (in Talking state), or has a call on hold (in Hold state), that agent is immediately signed out of the desktop but the call is retained.

Monitor a Call

You must be in Not Ready state to monitor an agent. You can monitor only one agent at a time. To monitor another agent, you must **End** the silent monitoring call and then select a new agent.

Procedure

Step 1 From the **Team Name** drop-down list, choose the team whose agents you want to monitor.

Step 2 From the displayed list, choose an agent to monitor.

Step 3 In the **Actions** tab of the selected agent, click ••• > **Monitor**.

The silent monitor call appears in the call control area of the desktop. The **Hold**, **Barge In**, and **End** buttons are enabled. Click:

Hold	To place the call on hold.

Retrieve	To retrieve the call placed on hold.
Barge In	To barge in to the call.

Step 4 To end the silent monitor call, click **End**.

Barge In on a Call

The Barge In feature allows you to join a call between an agent and a caller.

Note

- You can only barge in on a call that you are silently monitoring.
- For the supervisor to be able to barge in, the agent and supervisor extensions must have visibility to each other's partition or calling search space (CSS) without any prefix or steering digit.

Procedure

Step 1 From the **Team Name** drop-down list, choose the agent's team.

Step 2 From the displayed list, choose an agent in the Talking state.

Step 3 In the **Actions** tab of the selected agent, click ••• > **Monitor**.

The silent monitor call appears in the call control area of your desktop. The **Barge In** button appears.

Step 4 Click **Barge In**.

The call becomes a conference call between you, the agent, and the caller.

Intercept a Call

After you barge in to a call between an agent and a caller, you can intercept the call by dropping the agent from the call. You can also drop any participant from a conference call in which you are a participant.

Procedure

Step 1 Click the **Drop** drop-down.

Step 2 Click the agent to drop from the list of participants.

Note Even if an agent initiates a conference call, only the supervisor can drop an agent from the call. The Supervisor cannot drop a CTI Route Point, IVR Port, or a caller.

Send Team Message

The Team Message feature allows you to create and send a broadcast message to one or multiple teams. The message appears as a banner across the Finesse desktop and agents can view these messages in real-time. Team Message will be available on your Finesse desktop only if the administrator has configured this feature for you.

Procedure

Step 1 In the Finesse desktop, click the **Team Message** icon.

Step 2 In the **Compose Message** box, enter the broadcast message (maximum number of characters allowed is 255).

Step 3 Select the team or teams to send the message by checking the check box next to the team name.

Note You can send multiple messages to a single team, multiple teams, or all teams.

Step 4 From the drop-down, you can set an expiry time for the composed messages: starting at 5 minutes and ending at 23:55 hours. The time is displayed in hours and minutes. However, this time frame can be edited.

Step 5 Click **Send**.

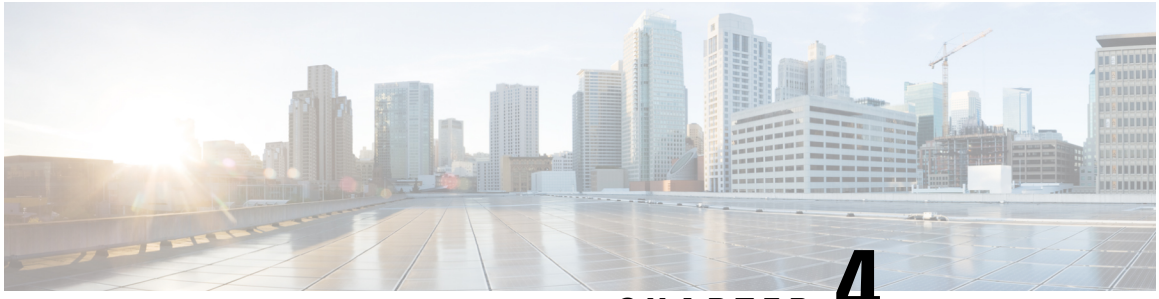
You can view the latest messages sent by clicking **Show recent messages**. If you wish to delete any or all messages, check the check box next to the message. Click **Delete** and confirm the deletion.

The message is removed from active display and the previous non-expired team message will become the active message for the agent.

Note Administrator or supervisor who creates a Team Message can delete the created Team Message through `TeamMessage` API. For more information on deleting a TeamMessage, see https://developer.cisco.com/docs/finesse/#teammessagedelete-a-team-message.

Note The rate at which messages (create/delete) are published to the teams involved, is capped at 400 per hour and the maximum number of active messages allowed is 4800. If the limit of active messages is reached, supervisors will not be able to broadcast new messages until an existing team message is deleted or it expires.

As there are no individual limitations on supervisors, either one or all supervisors can broadcast messages up to the maximum active messages limit.



CHAPTER 4

IP Phone Agent Tasks

Finesse IP Phone Agent

With Finesse IP Phone Agent (IPPA), you can access Finesse features on your Cisco IP Phone as an alternative to accessing Finesse through your browser. Finesse IPPA supports fewer features when compared to the Finesse desktop in the browser, but it does allow you to receive and manage Finesse calls if you lose or do not have access to a computer.

Supervisor Tasks

Finesse IPPA does not support supervisor tasks such as monitor, barge, and intercept, but supervisors can sign in and perform all agent tasks on their IP Phones.

To perform supervisor tasks for Finesse IPPA agents, supervisors must sign in to the Finesse desktop and follow the same steps that they use for the Finesse desktop agents (currently restricted to viewing team performance and changing an agent's state).

Agent Tasks

The following table provides a quick reference for common agent tasks:

Task	Steps
Sign In	• Press **Services** > **Cisco Finesse**. • Enter your ID, password, and extension. • Press **SignIn**.

Task	Steps
Change State	Press **Ready** or **NotReady**.
Apply Wrap-Up Reasons	Press **WrapUp** and select from the list.
Enable Optional Wrap-Up	If Wrap Up is optional, press **WrapUp** during the call to move to Wrap Up state after the call ends.
Sign Out	From the Not Ready state, press **SignOut**.

For more information about agent tasks, see the following sections.

Sign In to Finesse on the IP Phone

Before you begin

Your administrator must set up your Finesse IPPA access.

Procedure

Step 1 On your IP Phone, press the **Services** button.

Note The example figures shown in this procedure may differ from your phone's layout and display.

Step 2 Select **Cisco Finesse**.

Step 3 Enter your agent ID, password, and extension, and press **SignIn**.

Note

- You must enter your agent ID in the ID field. Unlike the Finesse desktop, Finesse IPPA does not support username for sign in.
- The **ID** (Finesse IPPA) in Unified CCE deployment refers to the AgentID (Peripheral number).

Note Your administrator can set up your phone with One Button Sign In, which allows you to sign in without specifying your ID, password, or extension. In this case, when you select Finesse from the Services menu, Finesse IPPA automatically enters your sign-in information, and you move directly to the home screen. Finesse IPPA One Button log in can also be configured by the Administrator with only some of the parameters like ID and Extension. In this case, you must enter only your password to sign in.

When signing out from the Finesse IPPA application, the Sign In page is displayed. Click on the **Exit** button to ensure that Single-Sign On works correctly the next time you log in to the Cisco Finesse application.

Change State on the IP Phone

When you sign in to Finesse on the IP Phone, your initial state is set to Not Ready. To receive calls, set your state to Ready.

While you are on a call, you can set the state that will apply when the call is complete. In this case, Finesse shows your current state and the pending state that Finesse applies after the call ends.

Procedure

Step 1 To set your state to Ready, press the **Ready** button.

Step 2 To set your state to Not Ready, press the **NotReady** button.

Step 3 If Not Ready reason codes appear, scroll to the desired reason, and press the **Select** button.

To change your selected reason code, press the **NotReady** button again and select a different reason.

Apply Wrap-Up Reason on the IP Phone

A Wrap-Up reason indicates why a customer called the contact center. For example, you can have one Wrap-Up reason for sales calls and another for support calls.

Your administrator can assign Wrap-Up reasons to you. In this case, the WrapUp button appears when you are on a call or while you are in Wrap-Up state after the call ends.

Note When you are on a call (talking state), the WrapUp button is displayed with the Ready and Not Ready buttons. You can select the WrapUp reason before ending the call.

If you do not select the Wrap-Up reason before ending the call, and if Wrap-Up reason is configured for you by the administrator, then WrapUp button is displayed after you end the call. You can now select the Wrap-Up reason.

If the administrator has not configured Wrap-Up reasons for you, the WrapUp button is not displayed.

Your administrator can set Wrap-Up as a required or optional step. If Wrap-Up is required, you move to the Wrap-Up state automatically after the call ends to complete any after call work. If Wrap-Up is optional, press WrapUp during the call to move to the Wrap-Up state after the call ends.

Procedure

Step 1 If Wrap-Up is required, press **WrapUp** during or after the call and select a Wrap Up reason from the list.

Step 2 If Wrap-Up is optional, press **WrapUp** during the call and:

- Select **Wrap Up After Call**, and select a Wrap-Up reason after the call ends.
- Select **Apply Wrap Up Reason**, and select a Wrap-Up reason during the call.

Step 3 To end the Wrap-Up state after the call ends, select your new state (Ready or NotReady) or wait for the preconfigured timer to expire.

While you are on a call, you can specify the next state to apply after Wrap-Up by selecting that state first. For example, while on a call, select **NotReady** and then select **WrapUp**. When the call ends, you enter the Wrap-Up state with a pending state of Not Ready. When the Wrap-Up timer expires, you enter the Not Ready state.

You cannot enter a Wrap-Up reason after you transfer a call. To enter a Wrap-Up reason for a call you transfer, select the Wrap-Up reason while the call is in progress.

Sign Out of Finesse on the IP Phone

Before you begin

You must be in the Not Ready state to sign out.

Procedure

Step 1 Press the **SignOut** button.

Step 2 If Sign Out reason codes appear, select the desired Sign Out reason, and press the **Select** button.

Recover Finesse IP Phone Agent Service After Failure

If the Finesse server you are currently signed in to goes out of service, the IP Phone displays an error indicating the Finesse service is unavailable. Unlike the Finesse desktop, the Finesse IP Phone Agent does not automatically failover to the alternate Finesse server. To resume general operations, exit from the current Finesse IP Phone service and manually sign in to an alternate Finesse IP Phone service.

Procedure

Step 1 Press **Retry** to retry the current Finesse service.

Step 2 If the issue is not resolved, sign in to an alternate Finesse service:

a) Press **Exit** to exit the current Finesse service.
b) Press the **Services** button.
c) Select an alternate **Cisco Finesse** service from the menu.
d) Enter your agent ID, password, and extension, and press the **SignIn** button.

Note

- If none of the available Finesse services allow you to connect, contact your administrator.
- If your IP Phone displays pending state information when you lose connection with the Finesse service, that state information is lost when you sign in again.

Set Finesse Service and Credentials Using the Self Care Portal

Your administrator may ask you to subscribe your phone to the Finesse service using the Unified CM Self Care Portal. If your administrator sets up One Button Sign In, they may also ask you to enter your ID, extension, or password in the Unified CM Self Care Portal. (Finesse IPPA can then enter these credentials for you automatically each time you sign in.)

Procedure

Step 1 Use your ID and password to sign in to the Self Care Portal from the following URL:

http://*UCM address*/ucmuser

Where *UCM address* is the address of Cisco Unified CM provided by your administrator.

Step 2 On the Self Care Portal, navigate to **Phones** > **Phone Settings** > **Services**.

Step 3 Select the phone that you want to subscribe to the Finesse service.

Step 4 If your administrator has already subscribed this phone to the Finesse service, click the **Edit Service** icon for the Finesse service, and go to Step 7. Else, go to Step 5.

Step 5 Click **Add New Service** for the phone and select the Finesse service from the drop-down.

Step 6 In the Display Name field, enter `Cisco Finesse` (or another display name that is appropriate for your phone).

Step 7 If your administrator requests that you enter your credentials, enter the required values for your agent id, password, and extension.

Step 8 Click **Save**.

What to do next

If your administrator has also set up a secondary Finesse service as a backup, perform these steps again on the secondary service.

Finesse IPPA Behavior

The following notes describe how Finesse IPPA behaves when you perform certain agent tasks.

Call Data Display

- When you make or receive a call, Finesse IPPA displays call data on the phone based on the administrator-defined layout. Unlike the Finesse desktop, Finesse IPPA displays all call data in one column. The display order relative to the Finesse desktop is: header, left column, right column. You can scroll to view the data as required.
- When you are on multiple calls (such as a consult call), Finesse IPPA displays call data for the active call. If all calls are on hold, Finesse IPPA displays call data for the last active call.
- Some IP Phone models display the Finesse IPPA screen and not the home screen during an ACD incoming call. You cannot accept the call as the **Answer** and **Decline** soft keys are not enabled in the Finesse IPPA screen. To answer the call:
  - Press the hard key on the top right of the IP Phone.
  - Use the phone handset.
  - Press the speaker button.

Phone Behavior When You Make a Call

- If you make a call without first navigating to the home phone screen, sometimes the IP Phone changes the display to the Finesse screen. To view the dialed numbers, navigate back to the home phone screen.
- If you call a busy number, the IP Phone first displays a `Busy` message, and then Finesse displays a `Talking` message until you end the call. You can safely ignore the `Talking` message.

Reserved and Hold State Not Displayed

- Unlike the Finesse desktop, Finesse IPPA does not display Reserved or Hold states. Instead, Finesse IPPA continues to display the previous state that applied (for example, Ready or Talking) before you moved to reserved or on hold.

No Wrap Up on Transferred Calls

- If you transfer a call, you cannot set any Wrap Up data for the call even if Finesse IPPA shows you in the Wrap Up state. To enter a Wrap Up reason for a transferred call, select the Wrap Up reason while the call is in progress.

Additional Finesse IPPA Behavior

- The Simplified New Call UI is currently not supported in Finesse IPPA. Enabling this feature will not allow the agent to make outbound calls in READY state.
- Finesse IPPA is not supported on VPN.
- When Finesse IPPA phone is powered off or reset, you will be logged out of the physical device.