



## **Cisco Finesse Agent and Supervisor Desktop User Guide for Cisco Webex CCE**

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## Change History

This table lists the changes that are made to this guide. Most recent changes appear at the top.

Change	See	Date
Added Manage Digital Channel gadget details.	Manage Digital Channels gadget	May 2023
Added a new topic that provides instructions about how you can reset the desktop layout to the default size.	Reset Layout for Current Tab	
Added Transcript gadget details and the link to the Contact Center AI Gadgets help.	Contact Center AI Gadgets	April 2022

Change	See	Date
<b>Initial Release of Document</b>		May 2021
Added CTI device selection details.	Agent Device Selection	
Added Finesse Maintenance Mode details.	Finesse Desktop Failover	
Added Edge Chromium details for Chromium browser support.	Browser Settings for Agent and Supervisor Desktop	
Added the security certificate acceptance procedure for Edge chromium browser.	Accept Security Certificates	
Added Agent Answers Gadget details.	Contact Center AI Gadgets	
Added Multi-Tab gadgets details.	Finesse Desktop Behavior	
Added shortcut keys for Multi-Tab gadgets.	Agent Keyboard Shortcuts	
Updated drop participants from conference call details.	Intercept a Call	
Updated DTMF desktop behaviour.	Send DTMF	
Added the custom message during sign on.	Sign In to Cisco Finesse Desktop	

## About This Guide

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

## Audience

This guide is intended for Webex Contact Center Enterprise (Webex CCE) for Contact Center agents and supervisors who use Finesse desktop.

## Related Documents

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



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- Updates to Known Bugs

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We appreciate your comments.

# Conventions

This document uses the following conventions:

Convention	Description
<b>boldface</b> font	<p>Boldface font is used to indicate commands, such as user entries, keys, buttons, folder names, and submenu names.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Choose <b>Edit</b> &gt; <b>Find</b>.</li> <li>• Click <b>Finish</b>.</li> </ul>
<i>italic</i> font	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> <li>• To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills.</li> <li>• A syntax value that the user must replace. Example: IF (<i>condition, true-value, false-value</i>)</li> <li>• A book title. Example: See the <i>Cisco Webex Contact Center Enterprise Features Guide</i>.</li> </ul>
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> <li>• Text as it appears in code or that the window displays. Example:  <pre>&lt;html&gt;&lt;title&gt;Cisco Systems, Inc. &lt;/title&gt;&lt;/html&gt;</pre> </li> </ul>
< >	<p>Angle brackets are used to indicate the following:</p> <ul style="list-style-type: none"> <li>• For arguments where the context does not allow italic, such as ASCII output.</li> <li>• A character string that the user enters but that does not appear on the window such as a password.</li> </ul>



# CHAPTER 1

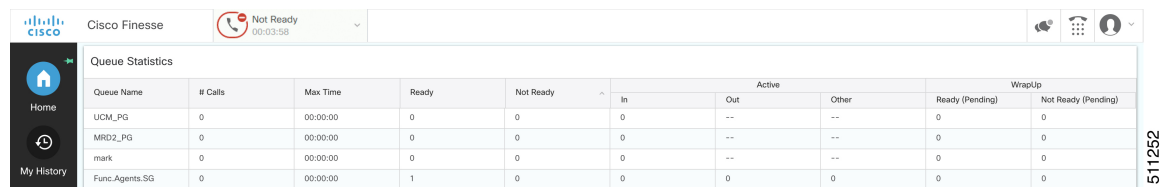
## Cisco Finesse Desktop Interface

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- Finesse Supervisor Desktop, on page 4
- State and Call Timers, on page 5
- Finesse Desktop Behavior, on page 5
- Finesse Desktop Failover, on page 10
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## 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**



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.

---

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.

Any contact name exceeding the preset width (170 pixels) have an ellipsis and a tool tip next to it to show the full name.
- **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.
- **Desktop Customization:** Agents can customize their desktop area as per their requirement by resizing and reorganizing the gadgets. The gadgets are automatically reorganized when the page is resized. The Call Control gadget is automatically minimized or maximized when any of the gadgets are maximized or minimized respectively.

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.



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**Note** Webex 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**

Agent Name	State	Time in State	Extension	Actions
AGENT 1001050	Ready	00:13:46	1001001	Monitor, Not Ready, Ready, Sign Out, View History
AGENT 1001049	Logged Out	--		
AGENT 1001048	Logged Out	--		
AGENT 1001047	Logged Out	--		
AGENT 1001046	Logged Out	--		

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.

### 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.




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**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.

## Multi-Tab Gadgets

Finesse desktop supports accessing multiple gadgets through tabs within a single gadget called Multi-Tab gadget. The Multi-Tab gadget allows rendering gadgets in a single desktop view, thus presenting more information to agents and supervisors in a concise and readily accessible manner. Agents and supervisors do not have to scroll down the page or switch between desktop container tabs to see additional information.

The Multi-Tab gadget can host any gadget supported by the desktop, except the Advanced Capabilities and Manage Chat and Email gadgets. Multiple instances of Multi-Tab gadgets are supported, which allows agents and supervisors to stack groups of gadgets to customize their desktop.

The main features of Multi-Tab gadget are as follows:

- Page-level gadgets and other types of gadgets can be hosted side by side as tabs within the Multi-Tab gadget.
- Gadget tabs can be dragged and dropped to different locations in the Multi-Tab gadget header.
- Shortcut keys can be used to switch between gadgets within the Multi-Tab gadget.
- Individual gadgets within a Multi-Tab gadget can have different heights that are defined by the Cisco Finesse administrator in the Desktop Layout. However, it is possible for an agent to enable a common height for all gadgets by using the **Dynamic Height** toggle button.
- The Call Control gadget can be hosted as a tab within the Multi-Tab gadget.
- Gadgets can be made to appear or hide based on the desktop context, using APIs. For more information, see the *Multi-Tab Gadgets* section in the *Cisco Finesse Web Services Developer and JavaScript Guide* at <https://developer.cisco.com/docs/finesse/>.
- Notifications can be made to appear or hide to control user attention, using APIs. For more information, see the *Multi-Tab Gadgets* section in the *Cisco Finesse Web Services Developer and JavaScript Guide* at <https://developer.cisco.com/docs/finesse/>.



- By default, seven gadget tabs can appear in the Multi-Tab gadget header. Additional tabs are moved into the tab selector drop-down list.

The following figure shows the default configurations of the Finesse desktop containing the Multi-Tab gadget.

**Figure 3: Multi-Tab Gadgets**

Queue Name	# Calls	Max Time	Ready	Not Ready	Active			Wrap Up	
					In	Out	Other	Ready (Pending)	Not Ready (Pending)
0001.SG	0	00:00:00	2	0	0	0	0	0	0
0002.SG	2	00:00:00	2	2	0	0	0	0	0
0003.SG	5	00:00:00	4	1	0	0	0	0	0
0004.SG	3	00:00:00	5	1	0	0	0	0	0
0006.SG	0	00:00:00	6	3	0	0	0	0	0
0007.SG	2	00:00:00	8	2	0	0	0	0	0
0008.SG	5	00:00:00	1	2	0	0	0	0	0
0009.SG	3	00:00:00	2	2	0	0	0	0	0
0010.SG	1	00:00:00	4	2	0	0	0	0	0
0011.SG	2	00:00:00	6	1	0	0	0	0	0
0012.SG	2	00:00:00	2	1	0	0	0	0	0
0013.SG	2	00:00:00	1	1	0	0	0	0	0

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### Ordering of Multi-Tab Gadget Tabs

The Multi-Tab gadget feature allows agents and supervisors to view multiple gadgets in a single view. The sequence of the tabs is based on the desktop layout configured by the administrator. When agents and supervisors log in for the first time, the gadget configured as the **default** in the desktop layout appears as the left-most gadget and has the default focus. Gadgets can be reordered by dragging them. For a particular agent or supervisor, this order is retained across logouts when the same browser is used (browser cache should not be cleared). Any change in the desktop layout by the administrator, the tab order is reset to the default layout during the next session or when the page is reloaded.

### Multi-Tab Behavior When Switching Between Desktop Container Tabs

When you switch the desktop container tab using the navigation bar, only the page-level gadgets are retained in the Multi-Tab gadget. The other gadgets are replaced with a new set of gadgets that are configured for the new desktop container tab.

For example, when agents and supervisors navigate from the **Home** desktop container tab to the **History** desktop container tab, the page-level gadgets remain the same. However, the desktop container specific gadget **Queue Statistics** is replaced by the **Recent Call History** gadget.

Figure 4: History

The screenshot displays the Cisco Finesse desktop interface. At the top, there's a header with the Cisco logo, the name 'Finesse', and a 'Talking' status indicator. Below this, a customer profile is shown for Michael Littlefoot, including contact information and account details. A 'Recent Call History' table is visible below the profile, listing call records with columns for Agent, Duration, Type, Number, Disposition, Queue, and Wrap-Up Reason. The table contains 15 rows of call data from May 01, 2017, to May 04, 2017.

Agent	Duration	Type	Number	Disposition	Queue	Wrap-Up Reason
May 04 2017 9:43:53 AM	00:00:00	Inbound	+13780049003	Answered	Warranty	Onb_Erd12
May 04 2017 9:43:00 AM	13:09:12	Inbound	97224453990	Transferred	Servicing	SalesPromo
May 04 2017 9:41:05 AM	00:00:03	Outbound	Unknown	Failed	New Subscription	SalesPromo
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-
May 04 2017 9:36:00 AM	00:00:03	Outbound	1001075	Abandoned	-	-
May 04 2017 9:43:00 AM	13:09:12	Inbound	97224453990	Transferred	Servicing	SalesPromo
May 04 2017 9:41:05 AM	00:00:03	Outbound	Unknown	Failed	New Subscription	SalesPromo
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-
May 04 2017 9:36:00 AM	00:00:03	Outbound	1001075	Abandoned	-	-
May 03 2017 9:38:00 AM	00:00:15	Outbound	1011012	Unanswered	-	-
May 02 2017 9:36:00 AM	00:00:03	Outbound	1011075	Abandoned	-	-
May 01 2017 9:38:00 AM	00:00:15	Outbound	1101012	Unanswered	-	-
May 01 2017 9:36:00 AM	00:00:03	Outbound	1201075	Abandoned	-	-

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## Reset Tab Order

The **Reset Tab Order** button changes the sequence of the gadget tabs to the default order that was configured by the Cisco Finesse administrator.

## Dynamic Height

The **Dynamic Height** toggle button determines if individual gadgets within a Multi-Tab gadget have different heights (as configured by the Cisco Finesse administrator) or retain a common height.

If the **Dynamic Height** toggle button is set to On, individual gadgets within a Multi-Tab Gadget acquire the respective height configured by the Cisco Finesse administrator.

If the **Dynamic Height** toggle button is set to Off, all individual gadgets within a Multi-Tab Gadget retain a common height. A scroll bar might appear for the gadgets whose content is larger than the configured common height.

## Drag and Drop

The Multi-Tab gadget feature enables agents and supervisors to drag and drop the gadget tabs relative to one another within the Multi-Tab gadget header. Select a gadget by clicking on a gadget tab. Drag the gadget and drop it at the desired location on the Multi-Tab gadget header. The order of gadgets moved by agents and supervisors is retained across fail overs and browser reboots. This can be cleared by using the **Reset Tab Order** button. This order is lost when agents and supervisors switches to a different browser or when the browser cache is cleared.

## Drop Down

When there are more gadgets in the header than specified by the **maxTabsOnTabbedGadgetHeader** desktop property, a drop-down icon appears next to the last visible gadget name (more information, see the *Cisco Finesse CLI* chapter in the *Cisco Finesse Administration Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/finesse/products-maintenance-guides-list.html>). Upon clicking on the icon, the remaining gadget tabs are displayed in the drop-down list and can be used to activate any of the required tabs. The

drop-down icon displays a notification indicator when any of the gadget tabs that are part of the drop-down displays a notification.

### Maximize and Collapse

The Multi-Tab gadget functionality supports the maximize and collapse options when configured as a page-level gadget or a desktop container tab level gadget in the default layout setting. Once the Multi-Tab gadget is maximized, it stays maximized even when alternate tabs are activated. Agents and supervisors can restore the view by selecting the restore button from the Multi-Tab menu. Upon selecting the collapse menu item it collapses Multi-Tab gadget content area and retains only the header containing the tabs.

### Multi-Tab Gadget Notifications

A notification is shown in the gadgets to alert agents and supervisors about new activity in the gadget. A small red dot is displayed on the top-right corner of the gadget name to notify agents and supervisors about content changes within the gadget. When the gadget is under the drop-down list, the notification icon appears in the drop-down symbol.

The following figure demonstrates the notification functionality in Multi-Tab gadgets.

**Figure 5: Notification**

The screenshot shows the Cisco Finesse desktop interface. At the top, there's a navigation bar with the Cisco logo and 'Finesse' text. Below that, a status bar shows 'Talking 00:00:05' and several icons. The main area is divided into a left sidebar with navigation options like Home, My Statistics, History, More Live Data Reports, and Manage Chat and Email. The central content area displays a customer profile for Michael Littlefoot, including contact information and account details. Below the profile, there are tabs for Queue Statistics, Customer Experience Journey, Agent Answers (with a red notification dot), and Call Transcript. The Queue Statistics table is currently selected and shows a list of queue names, call counts, and various status metrics.

Queue Name	# Calls	Max Time	Ready	Not Ready	Active			Wrap Up	
					In	Out	Other	Ready (Pending)	Not Ready (Pending)
0001.SG	10	00:30:00	4	3	0	0	0	0	0
0002.SG	6	00:45:00	3	2	0	0	0	0	0
0003.SG	3	00:40:00	4	3	0	0	0	0	0
0004.SG	4	00:20:00	5	4	0	0	0	0	0
0005.SG	5	00:10:00	3	0	0	0	0	0	0
0006.SG	0	00:20:00	3	0	0	0	0	0	0
0007.SG	0	00:50:00	2	0	0	0	0	0	0
0008.SG	0	00:10:00	1	0	0	0	0	0	0
0009.SG	0	00:40:00	2	0	0	0	0	0	0
0010.SG	0	00:40:00	4	0	0	0	0	0	0
0007.SG	0	00:50:00	2	0	0	0	0	0	0
0008.SG	0	00:10:00	1	0	0	0	0	0	0
0009.SG	0	00:40:00	2	0	0	0	0	0	0



**Note** Notification functionality is unavailable for screen readers.

### Call Control Gadget in Multi-Tab

Finesse desktop Call Control gadget can be hosted as a tab within the Multi-Tab gadget. This frees up space within the desktop area. Once included, the Call Control gadget automatically hides or shows up depending on if the call is present on the desktop. It also shows notifications for changes in the call context.

The following figure demonstrates the desktop Call Control gadget placed within a Multi-Tab gadget.

Figure 6: Call Control Gadget in Multi-Tab

Agent Name	State	Reason	Duration	Domain	Direction	Precision Queue/ Skill Group	Attributes	Reason Code
5010001, GT_Agent1	Talking		00:23:09	Cisco_Voice	Other Out	PG1_CCM1.Cisco_voicr.defa.455		
5010002, GT_Agent2	Talking		00:13:09	Cisco_Voice	other	PG1_CCM1.Cisco_voicr.defa.455		
5010003, GT_Agent3	Ready		00:23:09	Cisco_Voice		PG1_CCM1.Cisco_voicr.defa.455		
5010004, GT_Agent4	Talking		00:09:09	Cisco_Voice	Other Out	PG1_CCM1.Cisco_voicr.defa.455		
5010005, GT_Agent5	Talking		00:01:01	Cisco_Voice	Other	PG1_CCM1.Cisco_voicr.defa.455		
5010006, GT_Agent6	Talking		00:50:09	Cisco_Voice	Other Out	PG1_CCM1.Cisco_voicr.defa.455		
5010007, GT_Agent7	Talking		00:20:09	Cisco_Voice	Other	PG1_CCM1.Cisco_voicr.defa.455		
5010008, GT_Agent8	Talking		00:10:09	Cisco_Voice		PG1_CCM1.Cisco_voicr.defa.455		
5010006, GT_Agent9	Talking		00:50:09	Cisco_Voice		PG1_CCM1.Cisco_voicr.defa.455		
5010007, GT_Agent10	Talking		00:20:09	Cisco_Voice	Other	PG1_CCM1.Cisco_voicr.defa.455		
5010008, GT_Agent11	Talking		00:10:09	Cisco_Voice		PG1_CCM1.Cisco_voicr.defa.455		

### Call Control Notifications in Multi-Tab Gadgets

When the Call Control gadget is configured as one of the Multi-Tab gadgets, notification appears during the following scenarios:

- When an agent answers an incoming call, accepts an outbound call, or dials a number.
- If an agent is in some other tab when the call ends and the agent moves to **Wrap-Up** state.
- When an agent applies any shortcut key, except in the following condition: The agent is in a different tab, there is only a single call that the agent is handling, and the **End Call** shortcut key is pressed. In this scenario, Call Control is not activated.

### Third-Party Gadget Notifications in Multi-Tab Gadgets

Third-party gadgets can be included in a Multi-Tab gadget on the Finesse desktop.

The Cisco Finesse administrator cannot configure notification settings for third-party gadgets. Only the developer of the third-party gadget can configure notification settings for the gadget.

### Accessibility

Multi-Tab gadget tabs can be switched using keyboard shortcuts. For more information see [Agent Keyboard Shortcuts](#), on page 14.

## 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.
- 

### Finesse Maintenance Mode

Cisco Finesse agents must accept both the certificates on the Cisco Finesse nodes when logging into the Finesse desktop in order to receive the notifications for the Finesse maintenance mode. When the maintenance mode starts, agents get notifications with a banner message saying the exact time the desktop starts migrating to the alternate node. A countdown timer is displayed exactly 15 seconds before the actual migration. When the countdown timer reaches zero, agents are automatically migrated to the alternate node.



---

**Note** Agent to agent chat history is not maintained after migrating to the alternate node.

---

## 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.

---

### 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.  <b>Note</b> In Internet Explorer, the message is read 1 to 3 times.

Page or gadget	Element	Notes
Queue Statistics gadget	Title	The screen reader reads the gadget title (Queue Statistics).
	Table	<p>The screen reader reads each table header and each cell in the table.</p> <p><b>Note</b> 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.</p>
Call Control Gadget	Phone Book	<p>The screen reader reads the contents of the phone book.</p> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• The phone book does not support use of CTRL+ALT+RIGHT/LEFT/UP/DOWN arrow keys to move between cells in the table.</li> <li>• The screen reader does not read the heading of each column in Internet Explorer 11.</li> </ul>
	Keypad	<p>The screen reader reads the number of the keypad and the letters that go with it (ABC, DEF, and so on).</p> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>• In the table summary, if you select the table, the screen reader reads the summary of the table, which is Keypad.</li> <li>• 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.</li> <li>• If you use Ctrl+Alt+Right, Left, Up, and Down arrow keys to move between the cells, extra buttons are read on the Keypad.</li> </ul>
	Call row errors	The screen reader reads the call row error messages.

Page or gadget	Element	Notes
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.

## Access Keyboard Shortcuts

Use the keyboard shortcuts for easy access to the Cisco Finesse agent and supervisor desktop features. The keyboard shortcuts are available for both agent and supervisor only if the administrator has configured this feature.




---

**Note** To run a keyboard shortcut, ensure focus is inside the desktop screen.

---

Press **Ctrl + Alt + F**.

or

Click the user options icon on the top-right corner of your screen > click **Keyboard Shortcuts**.

The **Keyboard Shortcuts List** dialog box lists the following:

- Pre-defined keyboard shortcuts
- Third-party gadgets keyboard shortcuts
- Conflicting keyboard shortcuts

**Note** Keyboard shortcuts will not respond if there are any conflicts between gadgets or components. To resolve these conflicts, contact your administrator.

---

## Agent Keyboard Shortcuts

The following table lists the agent-specific keyboard shortcuts.



Table 2: Agent Keyboard Shortcuts List (Windows)

Group	Action	Shortcut Key	Notes
Agent State	Ready for Call	Ctrl + Alt + R	-
	Not Ready for Call	Ctrl + Alt + N	Displays the reason codes drop-down when there are multiple Not Ready reason codes listed.
	Open Digital Channel State Control	Ctrl + Shift + L	-
	Ready for All Digital Channels	Ctrl + Shift + V	-
	Not Ready for All Digital Channels	Ctrl + Shift + Z	-
Application	Switch between Popover	Ctrl + Alt + P	Toggles between the popovers when there are multiple popover notifications.
	Maximize/Restore view	Ctrl + Shift + 0	-

Group	Action	Shortcut Key	Notes
Call Handling	Make New Call	Ctrl + Alt + O	-
	Direct Transfer Call	Ctrl + Alt + Q	-
	Open Keypad (DTMF)	Ctrl + Alt + K	-
	Open Consult	Ctrl + Alt + C	-
	Wrap-Up Call	Ctrl + Alt + W	-
	Reclassify Call	Ctrl + Alt + Y	-
	Schedule Callback	Ctrl + Alt + S	-
	Answer/Accept Call	Ctrl + Alt + A	Use the shortcut key in the following scenarios: <ul style="list-style-type: none"> <li>• Answers an incoming call</li> <li>• Accepts an Outbound Option or Direct Preview call</li> </ul>
	Close - Remove Record from Campaign	Ctrl + Alt + J	-
	Reject - Return Record to Campaign/Close this Callback	Ctrl + Alt + U	-
	End Call	Ctrl + Alt + E	Ends the last active call when there are multiple calls.
	Hold Call	Ctrl + Alt + V	Places the call that has the hold option when there are more than one call. If all calls have the Hold option, then the latest active call is placed on hold.
Retrieve Call	Ctrl + Alt + G	Retrieves the call that has the Retrieve option when there are more than one call. If all calls have the Retrieve option, then the latest call that is placed on hold is retrieved.	
Transfer Call	Ctrl + Alt + X	-	
Conference Call	Ctrl + Alt + H	-	
Desktop Chat	Toggle, Minimize and Maximize Chat Window	Ctrl + Shift + 1	-
	Open Desktop Chat	Ctrl + Shift + 3	-

Group	Action	Shortcut Key	Notes
Edit Call Variable	Save Edited Call Variable Values	Ctrl + Alt + M	-
	Revert Edited Call Variable Values	Ctrl + Alt + Z	-
Keyboard Shortcuts	Keyboard Shortcuts List	Ctrl + Alt + F	-
Multi-Tab Gadget	Switch to the next tab	Alt+Shift+N	Switches to the next tab within the Multi-Tab gadget.
	Switch to the previous tab	Alt+Shift+P	Switches to the previous tab within the Multi-Tab gadget.  <b>Note</b> For these Multi-Tab shortcuts to function, the focus should be inside the multi-tab gadget.
Navigation	Home	Ctrl + Alt + 1	The order of the shortcut key number depend on how the gadgets are arranged in your navigation bar. For example, if the <b>My History</b> gadget is the first in your navigation bar, then Ctrl + Alt + 1 opens the <b>My History</b> gadget.
	My History	Ctrl + Alt + 2	-
	My Statistics	Ctrl + Alt + 3	-
	Manage Customer	Ctrl + Alt + 4	-
Send Error Report	Send Error Report	Ctrl + Shift + 2	-
Sign Out	Sign Out	Ctrl + Alt + L	-

**Note**

- The letters used in the keyboard shortcuts are not case-sensitive.
- If you are using Mac keyboard, then press **Option** instead of **Alt**. For example, to access the keyboard shortcuts list press **Control–Option–F**.
- If you are using Mac machine running Firefox browser, then set the **Full Keyboard Access** to **All controls** (**System Preferences > Keyboard > Shortcuts**) to shift the keyboard focus to all controls.

## Supervisor Keyboard Shortcuts

When you sign in as a supervisor, the **Keyboard Shortcuts List** dialog box lists both the agent and supervisor-specific keyboard shortcuts. For more information on agent-specific keyboard shortcuts, see [Agent Keyboard Shortcuts](#), on page 14.

The following table lists the supervisor-specific keyboard shortcuts.

**Table 3: Supervisor Keyboard Shortcuts List (Windows)**

Group	Action	Shortcut Key
Call Handling	Barge in Call	Ctrl + Alt + B
	Drop Participant	Ctrl + Alt + D
Team Message	Open Team Message Window	Ctrl + Alt + 0
Team Performance	Select Team	Ctrl + Shift + F



### Note

- The letters used in the keyboard shortcuts are not case-sensitive.
- If you are using Mac keyboard, then press **Option** instead of **Alt**. For example, to access the keyboard shortcuts list press **Control–Option–F**.
- If you are using Mac machine running Firefox browser, then set the **Full Keyboard Access to All controls** (**System Preferences > Keyboard > Shortcuts**) to shift the keyboard focus to all controls.



## CHAPTER 2

# Agent Tasks

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- [Sign In to Cisco Finesse Desktop, on page 20](#)
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# Browser Settings for Finesse Desktop

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

## 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.

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.




---

**Note** Custom logon message is not displayed for SSO users.

---

**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: `/, \, [,],:;,|,=,.,+,*,?,<,>`.

**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.
  - For non-SSO users, a dialog with the message appears when you (agent, supervisor, administrator) click the **Sign In** button.
  - If sign in fails due to device errors the desktop attempts to automatically sign in again. An alert is displayed detailing the number of remaining retries and the time left for the next retry attempt.
  - If your administrator has enabled the device selection feature for you, the devices associated to your extension are displayed in **Select Your Preferred Device** screen. For more information see [Agent Device Selection, on page 21](#). Even if an agent has signed into only one device, this screen is displayed. Therefore, this screen offers a chance to determine if an agent has missed logging into the selected device and thereby retrying the login.
  - 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.

---

## Agent Device Selection

When you (agents and supervisors) need to use different devices that are configured with the same extension, the administrator must enable the Agent Device Selection feature for you. You can select one of the endpoints (Desk Phone with Extension Mobility, Desk Phone without Extension Mobility, Jabber, and so on) on the shared Automatic Call Distribution (ACD) lines as your active device while signing in to the Finesse desktop. This informs the solution to ignore the other devices and use the indicated device as the only source for call interaction. This allows effective control of the call irrespective of from where you connect to the system. You can switch the active device based on where you are working—across shifts, moving from one office to another across various locations, or working from home.

When you sign in with the desired extension, the **Select Your Preferred Device** screen displays a list of devices that share the same extension. You can refresh the list of devices (if the required device is not listed) and select the device that you want to use as the active device for the current desktop session.



- Note** When the Agent Device Selection feature is enabled, both primary and secondary extensions can be shared with multiple devices. However, ensure that the devices using the shared extensions are not used at the same time.

---

**Step 1** Sign in to the Finesse desktop.

If your administrator has enabled the Agent Device Selection feature, the devices sharing your extension are displayed in **Select Your Preferred Device** screen.

**Select Your Preferred Device** screen displays the shared devices in your extension in the following format: Device Type (Device Name). For example, Cisco 6940 (SEP0000BCCER9876).

- Note**
- If you have already signed in to Cisco Unified ICM, signing in to Cisco Finesse or refreshing the Finesse desktop after sign in does not show **Select Your Preferred Device** screen. You must explicitly sign out from the Finesse desktop and sign in again.
  - To change the device selection, you must explicitly sign out from Finesse desktop and sign in again.

**Step 2** Click the device name to select your preferred device.

- To access the Finesse desktop Sign In page, click **Back**. When you click the **Back** button on the browser, the page refreshes and you are retained on the same **Select Your Preferred Device** screen. However, if you had selected any device, the selection is lost.

**Note** Finesse desktop retains your selection only when you click **Continue**.

When the Finesse desktop fails over, the reconnection banner shows the active device that is selected for the new session, which is the same as the device selected before the failover.

**Note** If the required device is not listed, check whether the extension used to sign in (displayed in the **Select Your Preferred Device** screen) is valid and if you have signed in to the device. After you have signed in to the required device, click **Refresh**.

- When you place the pointer on the truncated (because of space constraints) device name, a tool tip appears to detail the complete information of the device like device type and device name.
- The supported resolution for the Finesse desktop is 1366 x 768 or higher for the optimal viewing of the **Select Your Preferred Device** screen.
- The maximum number of devices that are listed in **Select Your Preferred Device** screen is five.
  - If you have signed into more than five devices, and your preferred device is not listed, sign out from devices that are not required. Click **Refresh** in **Select Your Preferred Device** screen to update the displayed list of devices.
- When you sign in, the browser saves the device that is selected for that agent and the extension used. On subsequent sign-in of the same agent with the same extension, on the same machine, through the same browser, that device will be displayed as the first in the preferred device selection screen.

**Step 3** Click **Continue**.

The selected device is listed under the user options icon on the top-right corner of your screen.

**Note** To change the device selection, sign out from Finesse desktop and sign in again.



**Note** Enabling automatic device selection is supported when a single active device is available for the extension at the time of sign in. For more information, see *Enable Automatic Device Selection for Single Active Device* in *Cisco Finesse Administration Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/finesse/series.html#MaintainandOperate>

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## Sign In to Cisco Finesse Desktop Single Sign-On Mode

Cisco Finesse supports custom logon message for Finesse desktop users. .

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**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**.

**Note**

- If your administrator has enabled the device selection feature for you, the devices associated to your extension are displayed in **Select Your Preferred Device** screen. For more information see [Agent Device Selection, on page 21](#). Even if an agent has signed into only one device, this screen is displayed. Therefore, this screen offers a chance to determine if an agent has missed logging into the selected device and thereby retrying the login.
- If sign in fails due to device errors the desktop attempts to automatically sign in again. An alert is displayed detailing the number of remaining retries and the time left for the next retry attempt.
- 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** 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

---

**Step 1** In the address bar of your browser, enter `https://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, `https://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**.

**Note** If sign in fails due to device errors the desktop attempts to automatically sign in again. An alert is displayed detailing the number of remaining retries and the time left for the next retry attempt.

**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 HTTPS port in the sign-in URL in Step 1 of the preceding procedure.

- For secure access using HTTPS, enter:

https://<FQDN>:8445/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.

## 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 *Cisco Webex Contact Center Enterprise Features Guide Features Guide*.

---

**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** 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**.

**Note**

- If sign in fails due to device errors the desktop attempts to automatically sign in again. An alert is displayed detailing the number of remaining retries and the time left for the next retry attempt.

- Agent device selection is not applicable for mobile agents.

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 the Finesse desktop.

After you enter the Finesse desktop 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 the Finesse sign in page. The Finesse 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 the Finesse sign in page, enter your agent ID or username, password, and extension, 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 the Finesse 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 Finesse. 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 the Finesse Console 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 the Finesse desktop 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.

---

**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:
- 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.

---

- 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.

---

**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.

To change state for all digital channels:

---

**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.

---

**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.

---

---

**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



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**Note** Webex CCE has integrated the Call Transcript services. The Call Transcript gadget appears on the **Home** tab of your Finesse desktop if the administrator has configured the gadget for you. The gadget displays the transcripts of your voice calls. These transcripts enable you to wrap-up the call quickly and ensure that the wrap-up notes are accurate and readily available for future reference.

---

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.

---

---

**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.

---

**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.

---

**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.

- 
- 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.

- 
- 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.

---

- 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.

---

- 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 <b>End</b> on the consult call and click <b>Retrieve</b> on the customer call.
To place the other agent or supervisor on hold and go back to the customer	Click <b>Retrieve</b> on the customer call. Click <b>Retrieve</b> 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 <b>Conference</b> . If you want to leave the conference, click <b>End</b> .
To transfer the customer to the agent or supervisor you are consulting with	Click <b>Transfer</b> .

## 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.

### 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.

The **Wrap-Up** button and the call control buttons **Hold**, **Transfer**, **Consult**, and **End** are disabled across all calls when DTMF **Keypad** is opened, and until the responses to all DTMF requests are completed or have timed out. The number of outstanding requests and the timeout duration is configured by your administrator.



---

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

---

---

**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

---

**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.

---

**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.

---

- 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.

---

- Step 1** To move a single Contact:
- Click the ●●● icon at the end of the required contact.
  - From the drop-down, click **Move**.
  - In the **Select Destination** window, select an existing group or create a new group.
  - Click **Move**.
- Step 2** To move multiple contacts:
- Press and hold the **Ctrl** key and select the required contacts.
  - On the Contact list header, click **Move**.
  - In the **Select Destination** window, select existing groups or create a new group.
  - 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.

- 
- Step 1** To delete a single contact:
- In the Contact list, click the ●●● icon at the end of the required contact.
  - From the drop-down, click **Delete**.
  - In the confirmation prompt, click **Delete** to remove the contact from that group.
- Step 2** To delete multiple contacts:
- Press and hold the **Ctrl** key and select the required contacts.
  - On the Contact list header, click **Delete**.
  - In the confirmation prompt, click **Delete** to remove the contact from that group.
- 

## Edit Group

Use this option to change the group name.

- 
- 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.

- 
- 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.




---

**Note** The agent chat history does not persist across migration of the Cisco Finesse application during failover or maintenance.

---

- 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:




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**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:

- 
- 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 is 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:

- 
- 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.

---



---

**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.

---

## Edit Call Variables

You can edit the call variable values if the administrator has configured the call variable as editable. You can edit the values during an active call or in the wrap-up state.




---

**Note** Call variables edit operation updates the values of the variables within the particular call. All entities listening to dialog events receive the updated call variables through the Cisco Finesse notifications. If any CTI clients are connected to the same Agent PG, they also receive notifications of the changed call data through CTI call events. However, application scripts or databases that are used to populate the call variables are not directly affected by this edit.

---



---

**Step 1** In the Finesse desktop, expand the call control gadget to display the call variables.

**Step 2** Click in the text box to edit the values as required.

- Note** In the following scenarios the changes made to the call variable by a user is overwritten:
- When multiple users edit the same field at the same time. For example, when two users (User A and User B) are editing the same field at the same time and if User A saves the edited values. Then, the changes that are made by User B are overwritten and User B is notified with a message.
  - When there is a script change in the CTI server and during this period a user is editing the values. Then, the changes that are made by the user are overwritten and the user is notified with a message.

**Step 3** Click **Save**.

To retrieve the previously saved values, click **Revert**.

**Note** The unsaved field values are overwritten during conflict.

---

## 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 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.

---

**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.

---

## Drag-and-Drop and Resize Gadget or Component

The administrator can configure the drag-and-drop and resize gadget or component features for agents and supervisors to customize their Finesse desktop.

- The drag-and-drop feature allows agents and supervisors to drag (and drop) the gadget or the component to the required position on the desktop layout.
- The resize feature allows the agents and supervisors to shrink or expand the gadget or the component to a custom size on the desktop layout.
- Each desktop tab can be customized to have a unique layout without affecting other tabs.
- When you resize the browser, based on the width of the browser, gadgets in the desktop layout are automatically rearranged one below the other to fit the available screen area.

The Finesse desktop retains your customizations when you access the browser again. For more information on resetting to default layout, see the [Reset Layout](#) section.



---

**Note** These features are also applicable for third-party gadgets.

---



---

**Note** If the administrator modifies the default layout, the changes that you made are overwritten with the default settings. The changes are reflected when you refresh or sign in again.

---

## Drag-and-Drop a Gadget or Component

### Before you begin

This feature is available on your Finesse desktop only if the administrator has configured this feature for you.

- 
- Step 1** Sign in to the Cisco Finesse desktop.
- Step 2** Click on the gadget or component title header and drag the gadget or component to the required position on the desktop layout.



The drag-and-drop action that is performed on a gadget or component is specific to the logged in user, the browser used, to the respective tab, and the device used.

**Note** You can arrange a maximum of 12 gadgets or components side by side in a specific tab.



## Resize a Gadget or Component

### Before you begin

This feature is available on your Finesse desktop only if the administrator has configured this feature for you.

- 
- Step 1** Sign in to the Cisco Finesse desktop.
- Step 2** Place the pointer on the gadget or component border. When the pointer changes to , then click and drag the  to resize the gadget or component on the desktop layout.

The resize action that is performed on a gadget or component is specific to the logged in user, the browser used, to the respective tab, and the device used.

- Note**
-  indicates vertical resizing and  indicates horizontal resizing.
  - The maximum length of the gadget is restricted to the screen length. The minimum length of the gadget is restricted to a 12th of the screen length.

## Reset Layout

If you have modified the desktop layout using the drag-and-drop and resize features, then the layout can be reset to the default view using **Reset Layout** option. The **Reset Layout** option is available in the user options icon drop-down list.




---

**Note** You can also clear your browser cache to reset the layout to the default view.

---

- 
- Step 1** Click the user options icon on the top-right corner of the screen.
- Step 2** Click **Reset Layout**.
- Step 3** Click **Ok** in the confirmation dialog box.
- 

Restores the default view across all tabs.

## Reset Layout for Current Tab

If you have modified the desktop layout using the drag-and-drop and resize features, you can reset the desktop layout to the default size by using the **Reset Layout for Current Tab** option. This option is available in the user options icon drop-down list.

- 
- Step 1** Click the user options icon on the top-right corner of the screen.
- Step 2** Click **Reset Layout for Current Tab**.  
The **Reset Layout For Current Tab Confirmation** dialog is displayed.
- Step 3** Click **Ok**.  
Restores the gadgets to the default size in the current page.
- 

## Cisco Webex Experience Management Gadgets

The following Experience Management gadgets are displayed on the Finesse desktop only if your administrator has configured the gadgets to you.

**Customer Experience Journey (CEJ)**—Displays all the past survey responses from a customer as a chronological list. This helps you to gain context about the customer's past experiences with the business and engage appropriately with the customer. This gadget is automatically activated when an agent engages with a customer through a call, chat, or email. You can view the Customer Experience Journey including rating and scores such as Net Promoter Score (NPS), Customer Satisfaction (CSAT), and Customer Effort Score (CES). The responses are filtered for a customer based on customer ID, phone number, or email ID, whichever is available.

**Customer Experience Analytics (CEA)**—Displays the overall pulse of the customers or agents through industry-standard metrics such as NPS, CSAT, and CES or other KPIs being tracked within Experience Management. This gadget is available for agents and supervisors.

- **Agent Sign In**—When you sign in as an agent, this gadget displays your key metrics and KPIs as an aggregate of all your interactions with customers. This includes NPS, CES, and other KPIs such as agent friendliness, enthusiasm, communication skills.
- **Supervisor Sign In**—When you sign in as a supervisor, this gadget displays the data that is derived through the overall NPS, CES, and trend of these metrics over time. You can view data split by teams and agents. Insights from 'Like-Dislike' and 'Impact Analysis' identify areas for improvement and prioritize actions that drive the key metrics.



---

**Note** Use the same ID to login to Agent Desktop and ECE gadgets so that the key metrics are displayed properly.

---

## Contact Center AI Gadgets

Webex CCE leverages Artificial Intelligence (AI) and Natural Language Understanding (NLU) to provide services that assist agents. These services are available for the agents in the Cisco Finesse desktop gadgets. Agent Answers feature provides relevant suggestions and recommendations in real time for the agent to consider. The suggestions and recommendations are based on the ongoing conversation between the caller and the agent.

More often than not, agents lack the depth of knowledge about the products and services of the business they serve. Agent Answers enhances the customer experience because the timely suggestions massively enrich the ability of the agent to respond. Businesses can cut down on training costs and time. Also, you can use this feature to create up-sell and cross-sell opportunities to match the needs of the customer.

**Agent Answers Gadget:** The Agent Answers gadget displays suggestions or recommendations (also called as Answers) in real time during the conversation between an agent and a customer. These answers are excerpts from articles and Frequently Asked Questions (FAQs) in the Webex CCE knowledge base. Displaying answers on the gadget increases the efficiency and capabilities of an agent to respond to the customer more effectively.

For details about how to configure the Agent Answers gadget, see the section *Add Agent Answers Gadget* in *Cisco Finesse Administration Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/finesse/products-maintenance-guides-list.html>.

**Transcript Gadget:** The Transcript gadget displays the voice conversation that was dynamically converted to text and presents the text to an agent for real-time viewing and reference. Displaying the text in real time on the gadget increases the efficiency and capabilities of an agent to respond to the customer more effectively.

For details on how to configure Transcript gadget, see the section *Add Transcript Gadget* in *Cisco Finesse Administration Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/finesse/products-maintenance-guides-list.html>.

Webex CCE supports Agent Answers and Call Transcript services. These gadgets appear on the **Home** tab of your Cisco Finesse agent and supervisor desktop if your administrator has configured the gadgets for you.

For information about how to use the Contact Center AI Gadgets, see [Contact Center AI Gadgets Help](#).

## Manage Digital Channels gadget

Use the **Manage Digital Channels** gadget to interact with customers through digital channels. This gadget is available when your administrator has configured and assigned at least one digital channel to you. This gadget is available only with SSO login. The following digital channels are available:

- **Chat/Social Channels**—Represents a virtual media channel on the Finesse desktop to provide a common interface to control multiple underlying digital media. This channel represents the following digital media:
  - Chat
  - SMS

- **Email**—Represents the email digital channel.

For more information about using the **Manage Digital Channels** gadget, see the [Cisco Contact Center Enterprise Manage Digital Channels Gadget User Guide](#).





## CHAPTER 3

# IP Phone Agent Tasks

- [Finesse IP Phone Agent, on page 53](#)
- [Sign In to Finesse on the IP Phone, on page 54](#)
- [Change State on the IP Phone, on page 55](#)
- [Apply Wrap-Up Reason on the IP Phone, on page 56](#)
- [Sign Out of Finesse on the IP Phone, on page 56](#)
- [Recover Finesse IP Phone Agent Service After Failure, on page 57](#)
- [Set Finesse Service and Credentials Using the Self Care Portal, on page 57](#)
- [Finesse IPPA Behavior, on page 58](#)

## 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	<ul style="list-style-type: none"><li>• Press <b>Services</b> &gt; <b>Cisco Finesse</b>.</li><li>• Enter your ID, password, and extension.</li><li>• Press <b>SignIn</b>.</li></ul>

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

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.

**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.



- 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.

- 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.

**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.

---

**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.

---

**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.)

---

**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.
- You cannot end an active call as the **End** soft key is not enabled in the Finesse IPPA screen. To end a call:
  - Press **End** button on the IP Phone.
  - 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.





## CHAPTER 4

# Supervisor Tasks

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- [View Active Call Details, on page 62](#)
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- [Change the State of an Agent, on page 63](#)
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- [Intercept a Call, on page 65](#)
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## View Team Performance

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

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**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.

**Note** Use the **Search** box to refine any agent details by using the search criterion such as Agent Name, State, or Extension. The search results are retained even when you switch between tabs during the active session.

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.

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## 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.

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**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.

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**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.

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## 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.

**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.

- 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:

<b>Ready</b>	To force the agent state to Ready.
<b>Not Ready</b>	To force the agent state to Not Ready.
<b>Sign Out</b>	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.

- 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:

<b>Hold</b>	To place the call on hold.
<b>Retrieve</b>	To retrieve the call placed on hold.
<b>Barge In</b>	To barge in to the call.

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

**Note** The monitoring initiated on a consult call terminates, when the consult call is conferenced. This is due to the temporary nature of the monitored call. The monitoring must be re-initiated again, to monitor the conferenced call which is already in progress. Please note that monitoring initiated on a call before the consult call is placed, will not be affected due to conferencing activity and continues without disruption.

## 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.

**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

If you have initiated the conference call you can drop other agents, supervisors, or non-agents from the conference call based on the permission defined by your administrator.

The non-agents in the conference call include the caller, CTI Route Point, IVR port, a device to which no agent is signed in, or a caller device.

The **Drop** button is displayed on the call control area only if the administrator has set the permission for you to drop participants from the conference call.

**Step 1** Click **Drop**.

The agents, supervisors, or non-agents from the conference call are displayed. The agents and supervisors are prefixed with the icon (👤) followed by the extension that is used to sign-in to the Finesse desktop. The non-agents are prefixed with the icon (📞) followed by the ID of the caller device, CTI Route Point, IVR port, or a device to which no agent is signed in.

**Step 2** Click the agent, supervisor or non-agent to drop from the list of participants.

A prompt message is displayed to confirm the participant to be dropped from the conference call.

**Step 3** Click **Drop**.

**Limitation**

Finesse desktop cannot distinguish agents from another peripheral gateway (PG) as agents. So the agents from another PG are displayed using the same icon used for non-agents (👤) in the Finesse desktop.

## 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.

**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 per hour and the maximum number of active messages allowed is . 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.