Introduction

Cisco Finesse is a next-generation agent and supervisor desktop designed to provide a collaborative experience for the various communities that interact with your customer service organization. It helps improve the customer experience while offering a user-centric design to enhance customer care representative satisfaction as well.

Cisco Finesse provides:

- A browser-based administration console and a browser-based desktop for agents and supervisors; no client-side installations required.
- A single, customizable "cockpit", or interface, that gives customer care providers quick and easy access to multiple assets and information sources.
- REST APIs that simplify the development and integration of value-added applications and minimize the need for detailed desktop development expertise.

Note

Cisco Finesse service is not activated by default even when you update the appropriate licenses on a Unified CCX deployment.

Run the `utils uccx finesse activate` command to activate Cisco Finesse Service on each Unified CCX node in a cluster.


Finesse configuration changes are permitted on only the primary server. Access to Finesse administration console on the secondary server is read-only.
When you attempt to save the changes in Finesse administration console on the secondary node, you receive a message that administration on the secondary node is read-only.

Cisco Finesse Administration Console

Getting Started

This chapter describes the interfaces that you use to configure, administer, and maintain Cisco Finesse and describes how to access them.

Administration Tools

Cisco Finesse Administration Console

The Cisco Finesse administration console is a web-based interface used to configure system settings in Cisco Finesse. The administration console contains tabs that you click to access the various administration features. The tab names and the tasks that you can perform on each tab are as follows:

- **Call Variables Layout**: Manage the call variables and ECC variables that appear on the agent desktop call control gadget.
- **Desktop Layout**: Make changes to the default desktop layout for agents and supervisors.
- **Phone Books**: Add, edit, or delete phone books or phone book contacts.
- **Reasons**: Add, edit, or delete Not Ready reason codes, Sign Out reason codes, or Wrap-Up reasons.
- **Team Resources**: Assign desktop layouts, phone books, reason codes, and wrap-up reasons to specific teams.
- **Workflows**: Create and manage workflows and workflow actions.

The features you configure in the administration console are case-sensitive. For example, you can create two workflows named WORKFLOW and workflow or two phone books named BOOK and book.

Sign In to Cisco Finesse Administration Console

You can access the Cisco Finesse administration console only through HTTPS.

Procedure

| Step 1 | Direct your browser to https://hostname or IP address:8445/cfadmin, where hostname is the hostname of your primary server. |
| Step 2 | On the Sign-In page, in the ID field, enter the Application User ID that was established during the installation. |
| Step 3 | In the Password field, enter the Application User password that was established during the installation. |
| Step 4 | Click Sign In. A successful sign-in launches an interface with defined administration gadgets and a Sign Out link. |
Manage Call Variables Layout

On the Call Variables Layout tab on the Cisco Finesse administration console, you can define how call variables appear on the Finesse agent desktop.

Call Variables

The Finesse agent desktop supports one variable in the header of the call control gadget and up to a total of 20 variables in two columns below the header (up to 10 in each column). You can use call variables, Extended Call Context (ECC) variables, or the following Outbound Option ECC variables.

- BACampaign
- BAAccountNumber
- BAResponse
- BAStatus
- BADialedListID
- BATimeZone
- BABuddyName

Columns can be empty.

The following table describes the fields on the Manage Call Variables Layout gadget.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>A label that describes the variable for that entry (for example, Customer Name). The maximum length of this field is 50 characters.</td>
</tr>
<tr>
<td>Variable</td>
<td>The name of the call variable or ECC variable that is displayed to the agent. The maximum length of this field is 32 characters.</td>
</tr>
<tr>
<td>Delete?</td>
<td>Click the “X” to delete the specified row from the column.</td>
</tr>
</tbody>
</table>

Actions on the Manage Call Variables Layout gadget:

- **Add Row**: Adds a new row to the specified column

**Note**: The Add Row button is disabled if 10 variables are already configured for the specified column.

- **Save**: Saves your configuration changes
- **Revert**: Retrieves and reapplies the most recently saved call variable layout
When you modify the call variable layout of the agent desktop, the changes you make take effect after three seconds. However, agents who are signed in when the changes are made must sign out and sign back in to see those changes reflected on their desktops.

Configure Call Variables Layout

Procedure

Step 1 In the Call Header Layout area, in the Display Name field, enter the text that you want to appear in the header of the Call Control gadget on the Finesse desktop (for example, Customer Name).

Step 2 From the Variable drop-down list, choose the call variable or Outbound Option ECC variable that you want to appear in the header (for example, callVariable3).

Step 3 In the Call Body Left-Hand Layout and Call Body Right-Hand Layout areas:
   a) Click the X beside any row that you want to delete.
   b) Click Add Row if you want to add a new row.
   c) For each row, in the Display Name field, enter the text that you want to appear on the desktop, and then choose the corresponding call variable or Outbound Option ECC variable from the Variable drop-down list.

Step 4 Click Save.

Add ECC Variables to Call Variables Layout

Procedure

Step 1 In the header or the row where you want the ECC variable to appear, from the Variable drop-down list, choose Custom.
   The Custom/ECC Variable Entry dialog box appears.

Note Cisco Finesse only supports Latin1 characters for ECC variables. Other Unicode characters are not supported. For example, if you add an ECC variable that contains Chinese characters to the call variable layout, it may not appear correctly on the agent desktop.
Step 2  In the Custom/ECC Variable Name field, enter the name of the ECC variable you want to appear on the agent desktop.

Step 3  Click Set.
The ECC variable now appears in the Variable drop-down list for selection.

Manage Desktop Layout

You can define the layout of the Finesse desktop on the Desktop Layout tab.

Requirements, such as processor speed and RAM, for clients that access the Finesse desktop can vary. Desktops that receive events for more than one agent (such as agent and supervisor desktops running Live Data reports that contain information about other agents and skill groups) require more processing power than desktops that receive events for a single agent.

Factors that determine how much power is required for the client include, but are not limited to, the following:

- Contact center traffic
- Additional integrated gadgets in the desktop (such as Live Data reports or third-party gadgets)
- Other applications that run on the client and share resources with the Finesse desktop

Finesse Desktop Layout XML

The Finesse Layout XML defines the layout of the Finesse desktop, including tab names and the gadgets that appear on each tab.

Use the Manage Desktop Layout gadget to upload an XML layout file to define the layout of the Finesse desktop for agents and supervisors.

Actions on the Manage Desktop Layout gadget:

- Finesse Default Layout XML: Expands to show the layout XML for the default Finesse desktop.
- **Restore Default Layout**: Restores the Finesse desktop to the default layout.
- **Save**: Saves your configuration changes.
- **Revert**: Retrieves and applies the most recently saved desktop layout.

## Default Layout XML

The Finesse default desktop layout XML for Unified CCX contains optional tabs and gadgets for MediaSense and Web Chat and notes that describe how to modify the layout for your deployment type.

Remove the comments from the optional gadgets and tabs that you want to appear on the Finesse desktop.

Remove any gadgets or tabs that you do not want to use.

```xml
<finesseLayout xmlns="http://www.cisco.com/vtg/finesse">
  <layout>
    <role>Agent</role>
    <page>
      <gadget>/desktop/gadgets/CallControl.jsp</gadget>
      <!-- The following Gadget is used for WebChat. It is *ONLY* supported with WebChat.
      If you are not using WebChat, then remove it. If you are using WebChat, include
      this gadget in the Desktop Layouts used by Teams associated with chat
      CSQs. To include this functionality:
      1) Remove these comments leaving the gadget
      <gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
      -->
      <gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
    </page>
  </layout>
  <tabs>
    <tab>
      <id>home</id>
      <label>finesse.container.tabs.agent.homeLabel</label>
      <columns>
        <column>
          <gadgets>
            <gadget>https://localhost:8444/cuic/gadget/LiveData/
            LiveDataGadget.jsp?gadgetHeight=310&
            viewId=76D964AD1000014000000830A4E5E6F&
            filterId=AgentCSQStats.csqName=CL&compositeFilterId=
            AgentCSQStats.Agents.loginId</gadget>
            <gadget>https://localhost:8444/cuic/gadget/LiveData/
            LiveDataGadget.jsp?gadgetHeight=310&
            viewId=5C626F9C1000014000000600A4E5E33&
            filterId=ResourceIAQStats.resourceId=CL</gadget>
          </gadgets>
        </column>
      </columns>
    </tab>
    <tab>
      <id>myStatistics</id>
      <label>finesse.container.tabs.agent.myStatisticsLabel</label>
      <columns>
        <column>
          <gadgets>
            <gadget>https://localhost:8444/cuic/gadget/LiveData/
            LiveDataGadget.jsp?gadgetHeight=112&
            viewId=67D4311100001400000108A4E5E6B&
            filterId=ResourceIAQStats.resourceId=loginId</gadget>
            <gadget>https://localhost:8444/cuic/gadget/LiveData/
            LiveDataGadget.jsp?gadgetHeight=420&
            viewId=5D411E8A1000014000000230A4E5E6B&
            filterId=AgentStateDetailStats.loginId</gadget>
          </gadgets>
        </column>
      </columns>
    </tab>
  </tabs>
</finesseLayout>
```
The following Tab and Gadget are used for WebChat. They are *ONLY* supported with WebChat. If you are not using WebChat, then remove them. If you are using WebChat, include this Gadget in the Desktop Layouts used by Teams associated with chat CSQs. To include this functionality:

1) Remove these comments leaving the tab and gadget
2) Replace all instances of "my-socialminer-server" with the Fully Qualified Domain Name of your SocialMiner Server.
3) [OPTIONAL] Adjust the height of the gadget by changing the "gadgetHeight" parameter.

IMPORTANT NOTE:
- In order for this Gadget to work, you must have performed all documented prerequisite steps.

The following Gadget is used for WebChat. It is *ONLY* supported with WebChat. If you are not using WebChat, then remove it. If you are using WebChat, include this Gadget in the Desktop Layouts used by Teams associated with chat CSQs. To include this functionality:

1) Remove these comments leaving the gadget
2) Replace all instances of "localhost" with the Fully Qualified Domain Name of your SocialMiner Server.
3) [OPTIONAL] Adjust the height of the gadget by changing the "gadgetHeight" parameter.
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=F2F1FC1710000140000014E4A4E5D48&filterId=ResourceIAQStats.resourceId=CL</gadget>
<->
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=FD919FB910000140000014E4A4E5B29&filterId=ChatAgentStats.agentId=CL</gadget>
<-->
</gadgets>
</column>
</columns>
</tab>
<tab>
<id>queueData</id>
<label>finesse.container.tabs.supervisor.queueDataLabel</label>
<columns>
<column>
<gadgets>
</gadgets>
</column>
</columns>
</tab>
<tab>
<id>manageCall</id>
<label>finesse.container.tabs.supervisor.manageCallLabel</label>
</tab>
<!--
The following Tab and Gadget are used for WebChat. They are *ONLY* supported with WebChat. If you are not using WebChat, then remove them. If you are using WebChat, include this Gadget in the Desktop Layouts used by Teams associated with chat CSQs. To include this functionality:
1) Remove these comments leaving the gadget
<-->
</gadgets>
</column>
</tabs>

CSQs. To include this functionality:
1) Remove these comments leaving the tab and gadget
2) Replace all instances of "my-socialminer-server" with the Fully Qualified Domain Name of your SocialMiner Server.
3) [OPTIONAL] Adjust the height of the gadget by changing the "gadgetHeight" parameter.

IMPORTANT NOTE:
- In order for this Gadget to work, you must have performed all documented prerequisite steps.

```xml
tag>
  <id>manageChats</id>
  <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
  <column>
    <gadgets>
      <gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
    </gadgets>
  </column>
</tag>
```

**Note**
The following Tab and Gadget are for MediaSense. They are *ONLY* supported with MediaSense. If you are not using MediaSense, then remove them. If you are using MediaSense and wish to show Recording Management, then do the following:
1) Remove these comments leaving the tab and gadget
2) Replace all instances of "my-mediasense-server" with the Fully Qualified Domain Name of your MediaSense Server.

IMPORTANT NOTE:
- In order for this Gadget to work, you must have performed all documented prerequisite steps.

```xml
tag>
  <id>manageRecordings</id>
  <label>finesse.container.tabs.supervisor.manageRecordingsLabel</label>
  <column>
    <gadgets>
      <gadget>https://my-mediasense-server:8440/ora/gadget/MediaSenseGadget.xml</gadget>
    </gadgets>
  </column>
</tag>
```

**Update Default Desktop Layout**

When you modify the layout of the Finesse desktop, the changes you make take effect on the desktop after 10 seconds. However, agents who are signed in when the changes are made must sign out and sign back in to see those changes reflected on the desktop.

---

The call control gadget is only supported at the page level. You must ensure that the call control gadget (<gadget>/desktop/gadgets/CallControl.jsp</gadget>) is placed within the <page></page> tag for it to work correctly. Do not place this gadget within a <tab></tab> tag.
Procedure

Step 1  In the Finesse Layout XML area, make changes to the XML as required.

Example:
If you want to add a new tab called Reports, add the following XML within the tabs tags under the <role>Agent</role> tag.

```xml
  <tab>
    <id>reports</id>
    <label>Reports</label>
  </tab>
```

If you want to add this tab to the supervisor desktop, add the XML within the tabs tags under the <role>Supervisor</role> tag.

To add a gadget to a tab, add the XML for the gadget within the gadgets tag for that tab.

```xml
  <gadgets>
    <gadget>http://<ipAddress>/gadgets/<gadgetname>.xml</gadget>
  </gadgets>
```

Replace `<ipAddress>` with the IP address of the server where the gadget resides.

Step 2  Click Save.
Finesse validates the XML file to ensure that it is valid XML syntax and conforms to the Finesse schema.

Step 3  After you save your changes, if you want to revert to the last saved desktop layout, click Revert. If you want to revert to the default desktop layout, click Restore Default Layout.

Note  During upgrade, any changes made to the Cisco Finesse Default Layout will be not be updated. You need to click on Restore Default Layout to get the latest changes.

The Finesse default XML layout is as follows:

```xml
<finesseLayout xmlns="http://www.cisco.com/vtg/finesse">
  <layout>
    <role>Agent</role>
    <page>
      <gadget>/desktop/gadgets/CallControl.jsp</gadget>
    </page>
    <tabs>
      <tab>
        <id>home</id>
        <label>finesse.container.tabs.agent.homeLabel</label>
        <gadgets>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=76D964D10000140000000830A4E5E6F&filterId=AgentCSQStats.csqName=CL& compositeFilterId=AgentCSQStats.AgentIds.agentId=loginId</gadget>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=5C62F9C10000140000000600A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
        </gadgets>
      </tab>
      <tab>
        <id>myStatistics</id>
        <label>finesse.container.tabs.agent.myStatisticsLabel</label>
        <gadgets>
        </gadgets>
      </tab>
    </tabs>
  </layout>
</finesseLayout>
```
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=112&viewId=67D4371100001400000001A8A4E5E6B&filterId=ResourceIAQStats.resourceId=loginId</gadget>

<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=420&viewId=5D411E8A10000140000000230A4E5E6B&filterId=AgentStateDetailStats.agentId=loginId</gadget>

</gadgets>
</tab>
<tab>
    <id>manageCall</id>
    <label>finesse.container.tabs.agent.manageCallLabel</label>
</tab>
</tabs>
</layout>
<layout>
    <role>Supervisor</role>
    <page>
        <gadget>/desktop/gadgets/CallControl.jsp</gadget>
    </page>
    <tabs>
        <tab>
            <id>manageTeam</id>
            <label>finesse.container.tabs.supervisor.manageTeamLabel</label>
            <gadgets>
                <gadget>/desktop/gadgets/TeamPerformance.jsp</gadget>
            </gadgets>
        </tab>
        <tab>
            <id>teamData</id>
            <label>finesse.container.tabs.supervisor.teamDataLabel</label>
            <gadgets>
                <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=7291DCB410000140000000890A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
                <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=728283C21000014000000530A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
            </gadgets>
        </tab>
        <tab>
            <id>queueData</id>
            <label>finesse.container.tabs.supervisor.queueDataLabel</label>
            <gadgets>
                <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=C8EB1810000140000000A6A4E5E6B&filterId=VoiceIAQStats.esdName=CL</gadget>
            </gadgets>
        </tab>
    </tabs>
</page>
</layout>

<--
The following Tab and Gadget is for MediaSense. It is *ONLY* supported with MediaSense. If you are not using MediaSense, then remove it. If you are using MediaSense and wish to show Recording Management, then do the following:
   1) Remove these comments leaving the tab and gadget
   2) Replace all instances of "my-mediasense-server" with the Fully Qualified Domain Name of your MediaSense Server.

IMPORTANT NOTE:
- In order for this Gadget to work, you must have performed all documented prerequisite steps.

</layout>
</layout>
<gadgets>
  <gadget>https://my-mediasense-server:8440/ora/gadget/MediaSenseGadget.xml</gadget>
</gadgets>
</tabs>
</finesseLayout>

XML Schema Definition

You must ensure the XML you upload conforms to the XML schema definition for Finesse. The XML schema definition for Finesse is as follows:

```xml
<?xml version="1.0" encoding="ISO-8859-1" ?>
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
  targetNamespace="http://www.cisco.com/vtg/finesse"
  xmlns="http://www.cisco.com/vtg/finesse"
  elementFormDefault="qualified">
  <!-- definition of role type -->
  <xs:simpleType name="role">
    <xs:restriction base="xs:string">
      <xs:enumeration value="Agent"/>
      <xs:enumeration value="Supervisor"/>
      <xs:enumeration value="Admin"/>
    </xs:restriction>
  </xs:simpleType>

  <!-- definition of simple elements -->
  <xs:element name="id">
    <xs:simpleType>
      <xs:restriction base="xs:string">
        <xs:pattern value="[a-zA-Z](\[-_:.a-zA-Z0-9\])*"/>
      </xs:restriction>
    </xs:simpleType>
  </xs:element>
  <xs:element name="label">
    <xs:simpleType>
      <xs:restriction base="xs:string">
        <xs:minLength value="1"/>
      </xs:restriction>
    </xs:simpleType>
  </xs:element>
  <xs:element name="gadget">
    <xs:simpleType>
      <xs:restriction base="xs:anyURI">
        <xs:minLength value="1"/>
      </xs:restriction>
    </xs:simpleType>
  </xs:element>
  <xs:element name="role" type="role"/>

  <!-- Grouping of a set of gadgets -->
  <xs:complexType>
    <xs:sequence maxOccurs="unbounded">
      <!-- No limit to number of gadget URIs for now -->
      <xs:element ref="gadget"/>
      <!-- URI of the gadget xml -->
    </xs:sequence>
  </xs:complexType>
</xs:element>
```

Add Web Chat to Finesse

The Cisco Finesse default layout XML contains commented XML code for Web Chat gadgets available for the Finesse desktop. Each gadget or tab is surrounded by comment characters (<!-- and -->) and comments that describe what the tab or gadget is for and how to add it to the desktop.

Note

The Chat Control gadget is only supported at the page level. You must ensure that the Chat Control gadget (<gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>) is placed within the <page></page> tag. Placing this gadget within a <tab></tab> tag is not supported.

The procedure that you follow depends on your deployment. The following table describes when to use each procedure.
### When to Use

<table>
<thead>
<tr>
<th>Procedure</th>
<th>When to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Web Chat to the default desktop layout.</td>
<td>Follow this procedure if you want to add Web Chat to the Finesse desktop after a fresh installation or after an upgrade if you have not customized the default desktop layout.</td>
</tr>
<tr>
<td>Add Web Chat to a custom desktop layout.</td>
<td>Follow this procedure if you want to add Web Chat and have customized the desktop layout.</td>
</tr>
<tr>
<td>Add Web Chat to a team layout.</td>
<td>Follow this procedure if you want to add Web Chat to the desktop only for specific teams.</td>
</tr>
</tbody>
</table>

**Note**

After you add the Web Chat gadgets, sign in to the Finesse desktop and make sure they appear the way you want. Agents who are signed in to Finesse when you change the desktop layout must sign out and sign back in to see the change on their desktops.

---

### Add Web Chat to the Default Desktop Layout

**Note** If you upgraded from a previous release but do not have a custom desktop layout, click **Restore Default Layout** on the Manage Desktop Layout gadget and then follow the steps in this procedure.

**Procedure**

1. **Step 1**
   - In the Finesse administration console, click the **Desktop Layout** tab.

2. **Step 2**
   - To add the Chat Control gadget to the agent desktop, look for the following under the `<role>Agent</role>` tag and within the `<page></page>` tag:
   - `<gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>`

3. **Step 3**
   - Remove the comments and comment characters (`<!--` and `-->`) that surround the gadget, leaving only the gadget (`<gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>`).

4. **Step 4**
   - To add the Manage Chats tab and gadget to the agent desktop, look for the following within the `<tabs></tabs>` tag:
     ```xml
     <tab>
     <id>manageChats</id>
     <label>finesse.container.tabs.agent.manageChatsLabel</label>
     <gadgets>
     <gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
     </gadgets>
     </tab>
     ```
Step 5  Remove the comments and comment characters (<!-- and -->) that surround the tab.

Step 6  Replace my-socialminer-server in the gadget URL with the fully-qualified domain name (FQDN) of your SocialMiner server.

Step 7  Optionally, change the height of the Manage Chats gadget.

Example:
The height specified in the gadget URL is 430 pixels. If you want to change the height, change the gadgetHeight parameter in the URL to the desired value. For example if you want the gadget height to be 600 pixels, change the code as follows:

```
<gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=600</gadget>
```

The default and minimum height of the Manage Chats gadget is 430 pixels. If you do not specify a value for the gadgetHeight parameter or if you specify a value that is less than 430, the gadget defaults to 430 pixels.

Step 8  To add the Chat Control gadget to the supervisor desktop, look for the following under the <role>Supervisor</role> tag and within the <page></page> tag:

```
<gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
```

Step 9  Remove the comments and comment characters (<!-- and -->), leaving only the gadget

```
<gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
```

Step 10 To add the Live Data report for Agent Chat Statistics to the supervisor desktop, look for the following:

```
<gadget>https://localhost:8444/cuic/gadget/LiveData/
LiveDataGadget.jsp?gadgetHeight=310&
viewId=F2F1FC1710000144000014E0A4E5D48&
filterId=ChatAgentStats.agentId=CL</gadget>
```

Step 11 Remove the comments and comment characters (<!-- and -->), leaving only the gadget.

Step 12 To add the Live Data report for Chat Queue Statistics to the supervisor desktop, look for the following:

```
<gadget>https://localhost:8444/cuic/gadget/LiveData/
LiveDataGadget.jsp?gadgetHeight=310&
viewId=E42ED788100001440000007B0A4E5CA1&
filterId=ChatQueueStatistics.queueName=CL</gadget>
```

Step 13 Remove the comments and comment characters (<!-- and -->), leaving only the gadget.

Step 14 To add the Manage Chats tab and gadget to the supervisor desktop, look for the following within the <tabs></tabs> tag:

```
<tab>
  <id>manageChats</id>
  <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
  <gadgets>
    <gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
  </gadgets>
</tab>
```

Step 15 Remove the comments and comment characters (<!-- and -->) that surround the tab.

Step 16 Replace my-socialminer-server in the gadget URL with the fully-qualified domain name (FQDN) of your SocialMiner server.

Step 17 Optionally, change the height of the Manage Chats gadget.

Step 18 Click Save.
Add Web Chat to a Custom Desktop Layout

Procedure

**Step 1** In the Finesse administration console, click the Desktop Layout tab.

**Step 2** Click Finesse Default Layout XML to show the default layout XML.

**Step 3** Copy the XML code for the Chat Control gadget for the agent desktop.

```
<gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
```

**Step 4** To add the gadget to the agent desktop, paste the code within the `<page></page>` tags under the Call Control gadget as follows:

```
<role>Agent</role>
<page>
  <gadget>/desktop/gadgets/CallControl.jsp</gadget>
  <gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
</page>
```

**Step 5** To add the gadget to the supervisor desktop, paste the code within the `<page></page>` tags under the Call Control gadget as follows:

```
<role>Supervisor</role>
<page>
  <gadget>/desktop/gadgets/CallControl.jsp</gadget>
  <gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
</page>
```

**Step 6** Copy the code for the agent Manage Chats tab and gadget from the default layout XML.

```
<tab>
  <id>manageChats</id>
  <label>finesse.container.tabs.agent.manageChatsLabel</label>
  <gadgets>
  </gadgets>
</tab>
```

**Step 7** Paste the code within the `<tabs></tabs>` tag for the agent role after the Manage Call tab:

```
<tab>
  <id>manageCall</id>
  <label>finesse.container.tabs.agent.manageCallLabel</label>
</tab>
<tab>
  <id>manageChats</id>
  <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
  <gadgets>
  </gadgets>
</tab>
```

**Step 8** Replace my-social-miner-server with the FQDN of your SocialMiner server.

**Step 9** Optionally, change the height of the Manage Chats gadget.

**Example:**
The height specified in the gadget URL is 430 pixels. If you want to change the height, change the gadgetHeight parameter in the URL to the desired value. For example, if you want the gadget height to be 600 pixels, change the code as follows:

```xml
<gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=600</gadget>
```

The default and minimum height of the Manage Chats gadget is 430 pixels. If you do not specify a value for the gadgetHeight parameter or if you specify a value that is less than 430, the gadget defaults to 430 pixels.

**Step 10** Copy the code for the Live Data gadgets for Agent Chat Statistics and Chat Queue Statistics from the default layout XML.

```xml
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=F2F1FC171000014400000014E0A6E5DA8&filterId=ChatAgentStats.agentId=CL</gadget>
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=E42ED78B100001440000007B0A6E5CA1&filterId=ChatQueueStatistics.queueName=CL</gadget>
```

**Step 11** Paste the code for these gadgets within the `<gadgets>` tags for the tabs on which you want them to appear.

**Step 12** Copy the code for the supervisor Manage Chats tab and gadget from the default layout XML.

```xml
<tab>
  <id>manageChats</id>
  <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
  <gadgets>
    <gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
  </gadgets>
</tab>
```

**Step 13** Paste the code within the `<tabs>` tag for the supervisor role after the Manage Call tab:

```xml
<tab>
  <id>manageCall</id>
  <label>finesse.container.tabs.supervisor.manageCallLabel</label>
</tab>
<tab>
  <id>manageChats</id>
  <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
  <gadgets>
    <gadget>https://my-socialminer-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
  </gadgets>
</tab>
```

**Step 14** Replace my-social-miner-server with the FQDN of your SocialMiner server.

**Step 15** Optionally, change the height of the gadget.

**Step 16** Click Save.
Add Web Chat to a Team Layout

Procedure

Step 1 In the Finesse administration console, click the Desktop Layout tab.

Step 2 Click Finesse Default Layout XML to show the default layout XML.

Step 3 Copy the XML code for the Chat Control gadget for the agent desktop and paste it into a text file.

Step 4 Copy the code for the agent Manage Chats tab and gadget and paste it into your text file.

Step 5 Copy the code for the Live Data gadgets for Agent Chat Statistics and Chat Queue Statistics and paste it into your text file.

Step 6 Copy the code for the supervisor Manage Chats tab and gadget and paste it into your text file.

Step 7 Click the Team Resources tab.

Step 8 Select the team from the list of teams for which you want to add Web Chat.

Step 9 Check the Override System Default check box.

Step 10 In the Resources for <team name> area, click the Desktop Layout tab.

Step 11 To add the Chat Control gadget to the agent desktop, copy the code for the gadget from your text file and paste it within the <page></page> tags under the Call Control gadget as follows:

```
<role>Agent</role>
<page>
  <gadget>/desktop/gadgets/CallControl.jsp</gadget>
  <gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
</page>
```
Step 12  To add the gadget to the supervisor desktop, paste the code within the <page></page> tags under the Call Control gadget as follows:

```xml
<role>Supervisor</role>
<page>
    <gadget>/desktop/gadgets/CallControl.jsp</gadget>
    <gadget>https://localhost/agentdesktop/gadgets/chatControl.xml</gadget>
</page>
```

Step 13  To add the Manage Chats tab and gadget to the agent desktop, copy the code from your text file and paste it within the <tabs></tabs> tag for the agent role after the Manage Call tab:

```xml
<tab>
    <id>manageCall</id>
    <label>finesse.container.tabs.agent.manageCallLabel</label>
</tab>
<tab>
    <id>manageChats</id>
    <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
    <gadgets>
    </gadgets>
</tab>
```

Step 14  Replace my-social-miner-server with the FQDN of your SocialMiner server.

Step 15  Optionally, change the height of the Manage Chats gadget.

**Example:**

The height specified in the gadget URL is 430 pixels. If you want to change the height, change the gadgetHeight parameter in the URL to the desired value. For example if you want the gadget height to be 600 pixels, change the code as follows:

```xml
<gadget>https://my-social-miner-server/multisession/ui/gadgets/multisession-reply-gadget.jsp?gadgetHeight=600</gadget>
```

The default and minimum height of the Manage Chats gadget is 430 pixels. If you do not specify a value for the gadgetHeight parameter or if you specify a value that is less than 430, the gadget defaults to 430 pixels.

Step 16  To add the Live Data gadgets for Web Chat to the supervisor desktop:

a)  Copy the code for the Agent Chat Statistics Live Data gadget from your text file and paste it within the <gadgets></gadgets> tags for the tab on which you want it to appear.

b)  Copy the code for the Chat Queue Statistics Live Data gadget from your text file and paste it within the <gadgets></gadgets> tags for the tab on which you want it to appear.

Step 17  To add the Manage Chats tab gadget to the supervisor desktop, copy the code from your text file and paste it within the <tabs></tabs> tag for the supervisor role after the Manage Call tab:

```xml
<tab>
    <id>manageCall</id>
    <label>finesse.container.tabs.supervisor.manageCallLabel</label>
</tab>
<tab>
    <id>manageChats</id>
    <label>finesse.container.tabs.supervisor.manageChatsLabel</label>
    <gadgets>
    </gadgets>
</tab>
```
Step 18  Replace my-social-miner-server with the FQDN of your SocialMiner server.
Step 19  Optionally, change the height of the gadget.
Step 20  Click Save.

## Live Data Gadgets

Cisco Finesse for Unified CCX supports Live Data gadgets. Live Data gadgets display information about the current state of the contact center. The gadgets receive data from the real-time data source at frequent intervals and display reports in grid format only.

Cisco Unified Intelligence Center provides Live Data real-time reports that you can add to the Cisco Finesse agent and supervisor desktop.

This feature provides the following access:

- Agents can access the Live Data agent reports.
- Supervisors can access the Live Data supervisor reports.

### Gadgets URLs for Reports

The following table displays gadgets URLs for reports.
<table>
<thead>
<tr>
<th>Users</th>
<th>Reports</th>
<th>Report View</th>
<th>Is the Report Available in Default Layout?</th>
<th>Tab</th>
<th>Gadget URLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent</td>
<td>Agent CSQ Statistics Report</td>
<td>Agent CSQ Statistics Report</td>
<td>Yes</td>
<td>Home</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=76D964AD10000140000000830A4E5E6F&amp;filterId=AgentCSQStats.csqName=CL&amp;compositeFilterId=AgentCSQStats.AgentIds.agentId=loginId">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=76D964AD10000140000000830A4E5E6F&amp;filterId=AgentCSQStats.csqName=CL&amp;compositeFilterId=AgentCSQStats.AgentIds.agentId=loginId</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Agent</td>
<td>Agent Team Summary Report</td>
<td>Agent Team Summary Report</td>
<td>Yes</td>
<td>Home</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=5C626F9C10000140000000600A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=5C626F9C10000140000000600A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Agent Outbound Team Summary Report</td>
<td>Report since midnight</td>
<td>No</td>
<td>Team Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=FD919FB91000014400000005D0A4E5B29&amp;filterId=ResourceIAQStats.resourceId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=FD919FB91000014400000005D0A4E5B29&amp;filterId=ResourceIAQStats.resourceId=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Agent Outbound Team Summary Report</td>
<td>Short and long term average</td>
<td>No</td>
<td>Team Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=FD919FB5100001440000000470A4E5B29&amp;filterId=ResourceIAQStats.resourceId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=FD919FB5100001440000000470A4E5B29&amp;filterId=ResourceIAQStats.resourceId=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Chat Agent Statistics Report</td>
<td>Chat Agent Statistics Report</td>
<td>No</td>
<td>Team Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=120&amp;viewId=F2F1FC171000014400000014E0A4E5D48&amp;filterId=ChatAgentStats.agentId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=120&amp;viewId=F2F1FC171000014400000014E0A4E5D48&amp;filterId=ChatAgentStats.agentId=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Chat CSQ Summary Report</td>
<td>Chat CSQ Summary Report</td>
<td>No</td>
<td>Queue Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=120&amp;viewId=42ED788100001440000007B0A4E5CA1&amp;filterId=ChatQueueStatistics.queueName=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=120&amp;viewId=42ED788100001440000007B0A4E5CA1&amp;filterId=ChatQueueStatistics.queueName=CL</a>&lt;/gadget&gt;</td>
</tr>
</tbody>
</table>

No
Supervisor

No
<table>
<thead>
<tr>
<th>Users</th>
<th>Reports</th>
<th>Report View</th>
<th>Is the Report Available in Default Layout?</th>
<th>Tab</th>
<th>Gadget URLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team State Report</td>
<td>Team State Report</td>
<td>—</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=5C90012F1000014000000830A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=5C90012F1000014000000830A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL</a>&lt;/gadget&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>Team Summary Report</td>
<td>Report since midnight</td>
<td>Yes</td>
<td>Team Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=728283C210000140000000530A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=728283C210000140000000530A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Team Summary Report</td>
<td>Short and long term average</td>
<td>Yes</td>
<td>Team Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=7291DCB410000140000000890A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=7291DCB410000140000000890A4E5B33&amp;filterId=ResourceIAQStats.resourceId=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Voice CSQ Summary</td>
<td>Snapshot</td>
<td>Yes</td>
<td>Queue Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=C8E2DB1610000140000000A60A4E5E6B&amp;filterId=VoiceIAQStats.esdName=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=C8E2DB1610000140000000A60A4E5E6B&amp;filterId=VoiceIAQStats.esdName=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Voice CSQ Summary</td>
<td>Short and long term average</td>
<td>Yes</td>
<td>Queue Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=C8EE241910000140000000C30A4E5E6B&amp;filterId=VoiceIAQStats.esdName=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=C8EE241910000140000000C30A4E5E6B&amp;filterId=VoiceIAQStats.esdName=CL</a>&lt;/gadget&gt;</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Voice CSQ Summary</td>
<td>Report since midnight</td>
<td>No</td>
<td>Queue Data</td>
<td>&lt;gadget&gt;<a href="https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=C8EF510810000140000000EB0A4E5E6B&amp;filterId=VoiceIAQStats.esdName=CL">https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&amp;viewId=C8EF510810000140000000EB0A4E5E6B&amp;filterId=VoiceIAQStats.esdName=CL</a>&lt;/gadget&gt;</td>
</tr>
</tbody>
</table>

**Gadgets Customization**

You can use optional query parameter to adjust height of the gadgets.
Add Live Data Gadgets to Desktop Layout

The Cisco Finesse default layout XML contains commented XML code for the Live Data gadgets available for Cisco Finesse desktop. Perform the following steps to add Live Data gadgets to desktop layout:

**Procedure**

**Step 1** Sign in to Cisco Finesse administration console.
Cisco Finesse home page appears.

**Step 2** Click the **Desktop Layout** tab.

**Step 3** Click **Finesse Default Layout XML** to show the default layout XML.

**Step 4** Copy the gadget URL for the report you want to add from **Live Data Gadgets**.

**Example:**
To add the Agent Report, copy the following:

```xml
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=150&viewId=67D4371100001400000001080A4E5E6b&filterId=ResourceIAQStats.resourceId=loginId</gadget>
```

**Step 5** Paste the gadget URL within the tab tags where you want it to appear.

**Example:**
To add the report to the home tab of the agent desktop:

```xml
<finesseLayout xmlns="http://www.cisco.com/vtg/finesse">
  <layout>
    <role>Agent</role>
    <page>
      <gadget>/desktop/gadgets/CallControl.jsp</gadget>
    </page>
    <tabs>
      <tab>
        <id>home</id>
        <label>finesse.container.tabs.agent.homeLabel</label>
        <gadgets>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=76D964AD1000014000000830A4E5E6F&filterId=AgentCSQStats.csqName=CL&compositeFilterId=AgentCSQStats.AgentIds.agentId=loginId</gadget>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=5C626F9C10000140000000600A4E5E63&filterId=ResourceIAQStats.resourceId=CL</gadget>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=150&viewId=67D4371100001400000001080A4E5E6B&filterId=ResourceIAQStats.resourceId=loginId</gadget>
        </gadgets>
      </tab>
      <tab>
        <id>myStatistics</id>
        <label>finesse.container.tabs.agent.myStatisticsLabel</label>
        <gadgets>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=600&viewId=5D411EB81000014000000230A4E5E6B&filterId=AgentStateDetailStats.agentID=loginId</gadget>
        </gadgets>
      </tab>
      <tab>
        <id>manageCall</id>
        <label>finesse.container.tabs.agent.manageCallLabel</label>
      </tab>
    </tabs>
  </layout>
</finesseLayout>
```
Add Customized Live Data Gadgets to Desktop Layout

This procedure explains how to create gadget URLs for customized Live Data reports, which are copied from stock reports, and add them to desktop layout.

### Procedure

**Step 1** Copy the gadget URL of the stock report that you want to customize from Live Data Gadgets and paste it in a text editor.

**Example:**
Consider the URL shown here as the gadget URL. Copy and paste it in a text editor. The underlined ID is the value of viewID.

```
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=5C626F9C10000140000000600A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
```

**Step 2** In Cisco Unified Intelligence Center, in the Edit view of the customized report, select the view for which you want to create the gadget URL and then click **Links**. The HTML Link field displays the permalink of the customized report.

**Step 3** Copy the permalink of the customized report from the **HTML Link** field and paste it in a text editor, then copy the viewID value from this link.

**Example:**
Copy the underlined viewID value from the permalink of the customized report.

```
https://<Server Name>:8444/cuic/permalink/PermalinkViewer.htmx?viewId=5C90012F10000140000000830A4E5B33&linkType=htmlType&viewType=Grid
```

**Step 4** Replace the viewID value in the gadget URL with the viewID value from the permalink of the customized report.

**Example:**
The customized gadget URL appears as shown here after replacing the viewID value with the viewID value of the customized report.

```html
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310 &viewId=5C90012F10000140000000830A4E5B354filterId=ResourceIAQStats.resourceId=CL</gadget>
```

**Step 5**
Add the customized gadget URL to Desktop Layout in the Finesse administration console and save.

**Step 6**
Log in to Finesse desktop and check the report.

---

## Manage Phone Books

On the Phone Books tab of the Cisco Finesse administration console, you can create and manage global and team phone books and phone book contacts. Global phone books are available to all agents; team phone books are available to agents in that specific team.

### Phone Books and Contacts

Finesse supports the following number of phone books:

- 10 global phone books
- 50 team phone books

The system supports a total of 1500 contacts.

Use the Manage Phone Books gadget to view, add, edit, or delete phone books and phone book contacts. Click the Name or Assign To headers to sort the phone books in ascending or descending order. Click the last Name, First Name, Number, or Note headers to sort the contacts in ascending or descending order.

The following table describes the fields on the Manage Phone Books gadget.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the phone book. The name must be unique, and can be a maximum length of 64 alphanumeric characters.</td>
</tr>
<tr>
<td>Assign To</td>
<td>Indicates if the phone book is global (All Users) or team (Teams).</td>
</tr>
<tr>
<td>Last Name</td>
<td>The last name of a contact. The last name can be a maximum length of 128 characters. This field is optional.</td>
</tr>
<tr>
<td>First Name</td>
<td>The first name of a contact. The first name can be a maximum length of 128 characters. This field is optional.</td>
</tr>
<tr>
<td>Number</td>
<td>The phone number for the contact. The phone number can be 1-32 characters long and cannot be blank.</td>
</tr>
<tr>
<td>Note</td>
<td>Optional text that describes the contact. The note can be a maximum length of 128 characters.</td>
</tr>
</tbody>
</table>
Actions on the Manage Phone Books gadget:

- **New**: Add a new phone book or contact
- **Edit**: Edit an existing phone book or contact
- **Delete**: Delete a phone book or contact
- **Refresh**: Reload the list of phone books or contacts from the server
- **Import**: Import a list of contacts to the phone book
- **Export**: Export a list of contacts from the phone book

Add Phone Book

**Procedure**

**Step 1** In the Manage Phone Books gadget, click **New**.
The Manage Phone Books area appears.

**Step 2** In the Name box, enter a name for the phone book.
**Note** Phone book names can be a maximum length of 64 characters.

**Step 3** In the Assign To box drop-down list, select **All Users** if the phone book is global or **Teams** if the phone book is available to specified teams.

**Step 4** Click **Save**.

Edit Phone Book

**Procedure**

**Step 1** In the Manage Phone Books gadget, select the phone book you want to edit.

**Step 2** Click **Edit**.
The Edit Phone Books area appears.

**Step 3** In the Name field, enter the new name for the phone book. If you want to change who can access the phone book, in the Assign To field drop-down list, choose **All Users** or **Teams**.

**Step 4** Click **Save**.
If you change the Assign To field from Teams to All Users, a message appears that asks you to confirm the change. Click **Yes** to confirm.
Delete Phone Book

Procedure

**Step 1**
In the Manage Phone Books gadget, select the phone book that you want to delete.

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

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

Import Contacts

The Import function allows you to replace all the contacts in a phone book with a new list of contacts, or to populate a new phone book with contacts.

The import list must be in the specified comma separated values (CSV) format, and can contain a maximum of 1500 contacts. Import lists that contain more than 1500 contacts are rejected with an error message.

The CSV file contains the fields described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Max Length</th>
<th>Can Be Blank?</th>
<th>Permitted Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>128</td>
<td>Yes</td>
<td>Alphanumeric characters</td>
</tr>
<tr>
<td>Last Name</td>
<td>128</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Phone Number</td>
<td>32</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td>128</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

Note: The CSV file that contains the contacts to import must use Latin encoding.

The following is an example of a phone book CSV file:

"First Name","Last Name","Phone Number","Notes"
"Amanda","Cohen","6511234",""
"Nicholas","Knight","612-555-1228","Sales"
"Natalie","Lambert","952-555-9876","Benefits"
"Joseph","Stonetree","651-555-7612","Manager"

A phone book CSV file must conform to this format and include the headers in the first line. During import, the file is scanned for illegal characters. If any are found, they are replaced with question marks.

Note: Exported CSV files always show each field enclosed in double quotes, as in the preceding example, to ensure that any commas or double quotes that are part of the actual filed data are not mistaken for field delimiters. If your data does not include these characters, you can omit the double quotes in files you prepare for importing.
Procedure

Step 1 In the Manage Phone Books gadget, select the phone book into which you want to import a list of contacts.

Step 2 Click Import.
The Import Contacts area appears.

Step 3 Click Browse and navigate to the location of the CSV file containing the contacts you want to import.

Note The CSV file must use Latin encoding.

Step 4 Click OK.

Export Contacts

The Export function allows you to extract a list of contacts from an existing phone book. The exported list is saved in CSV format.

Procedure

Step 1 In the Manage Phone Books gadget, select the phone book that contains the contacts you want to export.

Step 2 Click Export.
A message is displayed asking if you want to open or save the file.

Note The default name for an export file is PhoneBookContacts.csv.

Step 3 Click Open to open the CSV file in Excel, or click the Save drop-down list and choose Save, Save as, or Save and open, as desired.

Step 4 A message appears that gives you the option to view the downloaded file, open the folder into which the download was saved, view the Internet Explorer View Downloads window, or dismiss the message without viewing the file.

Add Contact

Procedure

Step 1 In the Manage Phone Books gadget, select the phone book to which you want to add a contact.
The List of Contacts for <phone book name> area appears.

Step 2 Click New.
The New Contact area appears.

**Step 3** Complete the fields. The First Name, Last Name, and Note fields are optional and have a maximum length of 128 characters. The Number field is required and has a maximum length of 32 characters.

**Step 4** Click Save.

---

### Edit Contact

**Procedure**

**Step 1** In the Manage Phone Books gadget, select the phone book that contains the contact you want to edit. The List of Contacts for <phone book name> area appears.

**Step 2** Select the contact you want to edit.

**Step 3** Click Edit. The Edit Contact area appears.

**Step 4** Edit the fields that you want to change. The First Name, Last Name, and Note fields are optional and have a maximum length of 128 characters. The Number field is required and has a maximum length of 32 characters.

**Step 5** Click Save.

---

### Delete Contact

**Procedure**

**Step 1** In the Manage Phone Books gadget, select the phone book that contains the contact you want to delete. The List of Contacts for <phone book name> area appears.

**Step 2** Select the contact that you want to delete.

**Step 3** Click Delete. A question appears asking you to confirm that you want to delete the selected contact.

**Step 4** Click Yes to confirm the deletion of the selected contact.

---

### Manage Reasons

The Reasons tab on the Cisco Finesse administration console allows you to view, add, edit, and delete Not Ready reason codes, Sign Out reason codes, and Wrap-Up reasons.
Certain reason codes are reserved and cannot be used.
For Unified CCX systems, these reserved reason codes are as follows: 0, 22, and 33.

**Not Ready Reason Codes**

Not Ready reason codes represent reasons that agents can select when they change their state to Not Ready.

Use the Manage Reason Codes (Not Ready) gadget to view, add, edit, or delete Not Ready reason codes.
Click the Reason Label or Reason Code headers to sort the Not Ready reason codes by label or reason code in ascending or descending order. Click the Global header to sort reason codes by whether they are global (Yes) or not (No).

Not Ready reason codes can be global (visible to all agents) or team (visible only to agents on specified teams).

Finesse supports a total of 200 Not Ready reason codes. This includes a maximum of 100 global Not Ready reason codes, and 100 Not Ready team reason codes. The team reason codes can be mapped to any team, and the same reason code can be mapped to multiple teams.

The following table describes the fields on the Manage Reason Codes (Not Ready) gadget.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason Label</td>
<td>The label for the Not Ready reason code. The label has a maximum length of 40 characters and should be unique for each Not Ready reason code. Both alphanumeric and special characters are supported.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>A code for the Not Ready reason. The value of the code must be between 1 and 999 and must be unique.</td>
</tr>
<tr>
<td>Global?</td>
<td>Yes/No. Indicates if the reason code is available globally to all agents (Yes) or to specific teams of agents (No).</td>
</tr>
</tbody>
</table>

In previous releases, Finesse did allow you to create multiple Not Ready reason codes with the same code or with code values greater than 999. If you upgraded from a previous release, you may have Not Ready reason codes in your database that violate the new rules. After you complete the upgrade, find the codes and edit them to give them unique values within the supported range. You can find the codes by clicking on the Reason Code header to sort the codes by their value.

**Actions on the Manage Reason Codes (Not Ready) gadget:**

- **New:** Add a new Not Ready reason code
- **Edit:** Edit an existing Not Ready reason code
- **Delete:** Delete a Not Ready reason code
• **Refresh**: Reload the list of Not Ready reason codes from the server

---

**Note**

When you add, edit, or delete a Not Ready reason code, the changes you make take effect on the Finesse desktop after three seconds. However, agents who are signed in when the changes are made must sign out and sign back in to see those changes reflected on their desktops.

---

When an agent signs in to the Finesse desktop, the agent state is set to Not Ready. The agent can then choose to go to Ready status or choose from one of the configured Not Ready reason codes from the agent state drop-down list.

If an agent wants to change from Ready to Not Ready status, that agent can choose the appropriate Not Ready reason code from the list of configured codes.

An agent who is on a call can select a state to be applied when the call is complete. For example, if an agent wants to be in Not Ready state when the call ends, that agent can choose Not Ready from the drop-down list while still on the call. The Finesse desktop shows the agent in Talking state and a pending state of Not Ready.

Pending state changes appear on the desktop while the agent's state is Talking (for example, on hold, in a consult call, conference, or silent monitor call).

---

**Add Not Ready Reason Code**

Perform the following procedure to add a new Not Ready reason code.

**Procedure**

**Step 1**

In the Manage Reason Codes (Not Ready) gadget, click New. The New Reason Code area appears.

**Step 2**

In the Reason Label box, enter a label for the reason code. Not Ready reason code labels are limited to 40 characters.

**Step 3**

In the Reason Code box, enter a reason code. The code must be between 1 and 999 and must be unique. Ensure there are no leading or trailing spaces.

**Step 4**

If the reason code is global, select the Global? check box. If the reason code is specific to a team, clear the Global? check box. By default, the Global? check box is selected.

**Step 5**

Click Save. The Finesse server removes leading or trailing spaces before saving the Reason Label in the database.

---

**Edit Not Ready Reason Code**

Perform the following procedure to edit the label or code for an existing Not Ready reason code.
Procedure

Step 1 In the Manage Reason Codes (Not Ready) gadget, select the reason code that you want to edit.
Step 2 Click Edit.
The Edit Reason Code area appears.
Step 3 If you want to change the label for the Not Ready reason code, in the Reason Label field, enter a new label for the reason code. If you want to change the code, in the Reason Code field, enter the new code. If you want to change who has access to the code, select or clear the Global? check box.
Step 4 Click Save.

Delete Not Ready Reason Code

Note An error may occur if an agent selects a Not Ready reason code after it has been deleted. Agents who are signed in when you make changes to Not Ready reason codes must sign out and sign back in to see those changes reflected on their desktops.

Perform the following procedure to delete a Not Ready reason code.

Procedure

Step 1 In the Manage Reason Codes (Not Ready) gadget, select the Not Ready reason code that you want to delete.
Step 2 Click Delete.
A question appears asking you to confirm that you want to delete the selected reason code.
Step 3 Click Yes to confirm the deletion of the selected reason code.

Sign Out Reason Codes

Sign Out reason codes represent reasons that agents can select when they sign out of the Finesse desktop.
Use the Manage Reason Codes (Sign Out) gadget to view, add, edit, or delete Sign Out reason codes. Click the Reason Label or Reason Code headers to sort the Sign Out reason codes by label or by reason code, in ascending or descending order. Click the Global header to sort the reason codes by whether they are global (Yes) or not (No).

Sign Out reason codes can be global (visible to all agents) or team (visible only to agents on specified teams).

Note Finesse supports a total of 200 Sign Out reason codes. This includes a maximum of 100 global Sign Out reason codes, and 100 Sign Out team reason codes. The team reason codes can be mapped to any team, and the same reason code can be mapped to multiple teams.
The following table describes the fields on the Manage Reason Codes (Sign Out) gadget.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason Label</td>
<td>The label for the Sign Out reason code. The label has a maximum length of 40 characters and should be unique for each Sign Out reason code. Both alphanumeric and special characters are supported.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>A code for the Sign Out reason. The code must be between 1 and 999 and must be unique.</td>
</tr>
<tr>
<td>Global?</td>
<td>Yes/No. Indicates if the reason code is available globally to all agents (Yes) or to specific teams of agents (No).</td>
</tr>
</tbody>
</table>

**Note**

In previous releases, Finesse did allow you to create multiple Sign Out reason codes with the same code or with code values greater than 999. If you upgraded from a previous release, you may have Sign Out reason codes in your database that violate the new rules. After you complete the upgrade, find the codes and edit them to give them unique values within the supported range. You can find the codes by clicking on the Reason Code header to sort the codes by their value.

**Actions on the Manage Reason Codes (Sign Out) gadget:**

- **New:** Add a new Sign Out reason code
- **Edit:** Edit an existing Sign Out reason code
- **Delete:** Delete a Sign Out reason code
- **Refresh:** Reload the list of Sign Out reason codes from the server

**Note**

When you add, edit, or delete a Sign Out reason code, the changes you make take effect on the Finesse desktop after three seconds. However, agents who are signed in when the changes are made must sign out and sign back in to see those changes reflected on their desktops.

When an agent clicks Sign Out on the desktop, any configured Sign Out codes appear in a drop-down list. The agent can then choose the code that represents why that agent is signing out.

**Add Sign Out Reason Code**

Perform the following procedure to add a new Sign Out reason code.

**Procedure**

**Step 1** In the Manage Reason Codes (Sign Out) gadget, click **New**.
   The New Reason Code area appears.

**Step 2** In the Reason Label box, enter a label for the reason code.
Sign Out reason code labels are limited to 40 characters.

Step 3 In the Reason Code box, enter a reason code.
Note The code must be between 1 and 999 and must be unique.
Ensure there are no leading or trailing spaces.

Step 4 If the reason code is global, select the Global? check box. If the reason code is specific to a team, clear the Global? check box.
Note By default, the Global? check box is selected.

Step 5 Click Save.

Edit Sign Out Reason Code

Perform the following procedure to edit the label or code for an existing Sign Out reason code.

Procedure

Step 1 In the Manage Reason Codes (Sign Out) gadget, select the reason code that you want to edit.
Step 2 Click Edit.
The Edit Reason Code area appears.
Step 3 If you want to change the label of the Sign Out reason code, in the Reason Label field, enter a new label for the reason code. If you want to change the code, in the Reason Code field, enter the new code. If you want to change who has access to the code, select or clear the Global? check box.
Step 4 Click Save.

Delete Sign Out Reason Code

Note An error may occur if an agent selects a Sign Out reason code after it has been deleted. Agents who are signed in when you make changes to Sign Out reason codes must sign out and sign back in to see those changes reflected on their desktops.

Perform the following procedure to delete a Sign Out reason code.

Procedure

Step 1 In the Manage Reason Codes (Sign Out) gadget, select the Sign Out reason code that you want to delete.
Step 2 Click Delete.
A question appears asking you to confirm that you want to delete the selected reason code.

**Step 3**  
Click **Yes** to confirm the deletion of the selected Sign Out reason code.

---

**Wrap-Up Reasons**

Wrap-Up reasons represent the reasons that agents can apply to calls. A Wrap-Up reason indicates why a customer called the contact center. For example, you may have one Wrap-Up reason for sales calls and another for support calls.

You can configure Wrap-Up reasons to be available globally to all agents or only to specific teams.

Use the Manage Wrap-Up Reasons gadget to view, add, edit, or delete Wrap-Up reasons. Click the Reason Label header to sort the Wrap-Up reasons in ascending or descending order.

---

**Note**  
Finesse supports a maximum of 100 global and 100 team Wrap-Up reasons.

Finesse supports wrap-up functionality only for incoming calls and Outbound Option Dialer Calls (Finesse does not support Outbound Option Direct Preview mode). Finesse does not support wrap-up for outgoing calls placed by agents.

---

**Note**  
If an agent is configured for wrap-up and selects a pending state during a call, when the call finishes that agent goes into wrap-up and not the pending state selected during the call. The agent can end wrap-up by either selecting a new state (Ready or Not Ready) or letting the wrap-up timer expire. If the agent selects a new state, the new state overrides the pending state selected during the call. If the wrap-up timer expires, the agent transitions to the pending state.

The following table describes the fields on the Manage Wrap-Up Reasons gadget.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason Label</td>
<td>The label for the Wrap-Up reason. This label must be unique for each Wrap-Up reason and has a maximum length of 39 bytes (which equals 39 US English characters). Both alphanumeric and special characters are supported.</td>
</tr>
<tr>
<td>Global?</td>
<td>Yes/No. Indicates if the Wrap-Up reason is available globally to all agents (Yes) or to specific teams of agents (No).</td>
</tr>
</tbody>
</table>

**Actions on the Manage Wrap-Up Reasons gadget:**

- **New**: Add a new Wrap-Up reason
- **Edit**: Edit an existing Wrap-Up reason
- **Delete**: Delete a Wrap-Up reason
- **Refresh**: Reload the list of Wrap-Up reasons from the server
When you add, edit, or delete a Wrap-Up reason, the changes you make take effect on the agent or supervisor desktop after three seconds. However, agents who are signed in when the changes are made must sign out and sign back in to see those changes reflected on their desktops.

Add Wrap-Up Reason

Perform the following procedure to add a new Wrap-Up reason.

Procedure

Step 1 In the Manage Wrap-Up Reasons gadget, click New. The New Wrap-Up Reason area appears.

Step 2 In the Reason Label field, add a label for the Wrap-Up reason. 

Note Wrap-Up reason labels are limited to 39 bytes.

Step 3 If the Wrap-Up reason is global, select the Global? check box. If the Wrap-Up reason is specific to a team, clear the Global? check box.

Note By default, the Global? check box is selected.

Step 4 Click Save.

Edit Wrap-Up Reason

Perform the following procedure to edit an existing Wrap-Up reason.

Procedure

Step 1 In the Manage Wrap-Up Reasons gadget, select the Wrap-Up reason that you want to edit.

Step 2 Click Edit. The Edit Wrap-Up Reason area appears.

Step 3 In the Wrap-Up Reason Label field, enter the new label for the Wrap-Up reason. If you want to change who has access to the Wrap-Up reason, select or clear the Global? check box.

Step 4 Click Save.

Delete Wrap-Up Reason

Perform the following procedure to delete a Wrap-Up reason.
**Procedure**

**Step 1** In the Manage Wrap-Up Reasons gadget, select the Wrap-Up reason that you want to delete.

**Step 2** Click **Delete**. A question appears asking you to confirm that you want to delete the selected Wrap-Up reason.

**Step 3** Click **Yes** to confirm the deletion of the selected Wrap-Up reason.

---

**Manage Team Resources**

You can assign phone books, reason codes, wrap-up reasons, custom desktop layouts, and workflows to teams on the Team Resources tab of the administration console.

**Team Resources**

Use the Manage Team Resources gadget on the Team Resources tab of the Cisco Finesse administration console to assign and unassign phone books, reasons, custom desktop layouts, and workflows to teams. Click the Name or ID header to sort the teams in ascending or descending order.

The Manage Team Resources gadget contains six tabs, each enabling you to assign or unassign resources to a team. The tabs are defined in the following table.

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop Layout</td>
<td>Use this tab to customize the desktop layout for the team. The default layout is defined in the Manage Desktop Layout gadget. You can define one custom layout for the team.</td>
</tr>
</tbody>
</table>
### Manage Team Resources

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Books</td>
<td>Use this tab to assign/unassign phone books to the team. Only phone books that are defined in the Manage Phone Books gadget as available to teams are available for assignment.</td>
</tr>
<tr>
<td>Reason Codes (Not Ready)</td>
<td>Use this tab to assign/unassign Not Ready reason codes to the team. Only Not Ready reason codes that are defined in the Manage Reason Codes (Not Ready) gadget as available to teams (not global) are available for assignment.</td>
</tr>
<tr>
<td>Reason Codes (Sign Out)</td>
<td>Use this tab to assign/unassign Sign Out reason codes to the team. Only Sign Out reason codes that are defined in the Manage Reason Codes (Sign Out) gadget as available to teams (not global) are available for assignment.</td>
</tr>
<tr>
<td>Wrap-Up Reasons</td>
<td>Use this tab to assign/unassign Wrap-Up reasons to the team. Only Wrap-Up reasons that are defined in the Manage Wrap-Up Reasons gadget as available to teams (not global) are available for assignment.</td>
</tr>
<tr>
<td>Workflows</td>
<td>Use this tab to assign/unassign workflows to the team. Only workflows that are defined in the Manage Workflows gadget are available for assignment.</td>
</tr>
</tbody>
</table>

**Actions on the Manage Team Resources gadget:**

- **Add:** Assign a phone book, reason, or workflow to the team
- **Save:** Save the phone book, reason, desktop layout assignment, or workflow to the team
- **Revert:** Cancel any changes made before they are saved
- **Refresh:** Refresh the list of teams

**Note**

If you select a team and then click Refresh, the team is de-selected and the Resources area for that team disappears. The list of teams is refreshed and you must select a team again.

---

**Assign Phone Books and Reasons to Team**

**Procedure**

1. **Step 1**
   - In the Manage Team Resources gadget, select a team.
   - Tabs for each available resource appear.
2. **Step 2**
   - Click the tab for the resource you want to assign for the selected team.
   - The List of <resource> area appears.
3. **Step 3**
   - Click **Add**.
The Add <resource> popup appears.

**Step 4** Select one or more resources from the list to assign them to the team. Resources you assign are highlighted in blue in the Add <resources> popup and added to the List of <resources> area.

**Step 5** When you has finished assigning resources, click Save.

**Note** You can make changes on all resource tabs and then save them at the same time. If there is an error on one resource tab but not others, the changes on the tabs with no errors are saved while the changes on the tab with errors are not saved.

---

### Unassign Phone Books and Reasons from Team

**Procedure**

**Step 1** In the Manage Team Resources gadget, select a team. Tabs for each available resource appear.

**Step 2** Click the tab for the resource you want to unassign from the selected team. The List of <resource> area appears.

**Step 3** Click the red X next to the resource you want to unassign.

**Step 4** Click Save.

---

### Assign Custom Desktop Layout to Team

Perform the following procedure to create and assign a custom desktop layout to a team.

**Procedure**

**Step 1** In the Manage Team Resources gadget, select a team. Tabs for each available resource appear.

**Step 2** Click the Desktop Layout tab. The Desktop Layout XML area appears. The area contains the default desktop layout XML.

**Step 3** Select the Override System Default check box. The XML becomes editable.

**Step 4** Edit the XML as desired.

**Step 5** Click Save. The custom desktop layout replaces the default desktop layout for the team after 10 seconds. If a supervisor or agent is signed in when the change is saved, the change does not go into effect on their desktop until the supervisor or agent signs out and signs in again.
If you clear the Override System Default check box, any changes you made to the XML are lost and the XML in the editing pane reverts to the default desktop layout XML.

Assign Workflows to Team

Procedure

Step 1 In the Manage Team Resources gadget, select a team. Tabs for each available resource appear.

Step 2 Click the Workflows tab. The List of Workflows area appears.

Step 3 Click Add. The Add Workflow popup appears.

Step 4 Select one or more workflows from the list to assign them to the team. Workflows you assign are highlighted in blue in the Add Workflows popup and added to the List of Workflows area.

Step 5 Workflows are executed in the order in which they are listed. Use the up and down arrows to move a selected workflow to the desired position in the list.

Step 6 When you has finished assigning workflows, click Save.

Note You can make changes on all resource tabs and then save them at the same time. If there is an error on one resource tab but not others, the changes on the tabs with no errors are saved while the changes on the tab with errors are not saved.

Unassign Workflows from Team

Procedure

Step 1 In the Manage Team Resources gadget, select a team. Tabs for each available resource appear.

Step 2 Click the Workflows tab. The List of Workflows area appears.

Step 3 Click the red X next to the workflow you want to unassign.

Step 4 Click Save.
Manage Workflows

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

Workflows and Workflow Actions

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

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

Finesse supports the following number of workflows and workflow actions:

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

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the workflow. The name must be unique and can be a maximum length of 40 characters.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the workflow. The description can be a maximum length of 128 characters.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the workflow action. The name must be unique and can be a maximum length of 64 characters.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of workflow. Possible values are Browser Pop, HTTP Request.</td>
</tr>
</tbody>
</table>

Actions on the Manage Workflows and Manage Workflow Actions gadgets:

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

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

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

- When a call arrives
- When a call is answered
- When a call ends
- When making a call

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

- To determine whether a workflow should execute, its trigger set and conditions are evaluated against each dialog event received.
- The workflow engine processes workflow events for the first call that matches any configured workflow's trigger set and conditions. No other workflows run until this call has ended. If the agent accepts a second call while still on the first call, workflows do not run on the second call even after the first call has ended.
- After a workflow for a particular trigger type (for example, Call Arrives) executes, it never triggers again for the same dialog ID.

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

---

**Note**

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

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

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

Individual conditions consist of the following:

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

When the trigger and its conditions are satisfied, a list of actions assigned to the workflow are executed. The actions execute in the order in which they are listed.
Workflows run only for agents and supervisors who are Finesse users. The Workflow Engine is a JavaScript library that runs client-side on a per-user basis within the Finesse desktop application. The desktop retrieves the workflows to execute for a user from the server when the user signs in or refreshes the browser.

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

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

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

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

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Workflow Trigger</th>
<th>Direct Preview Outbound Call</th>
<th>Progressive or Predictive Outbound Call</th>
</tr>
</thead>
<tbody>
<tr>
<td>While previewing a call</td>
<td>When the agent previews the call (before the agent accepts or rejects the call).</td>
<td>Does not trigger.</td>
</tr>
<tr>
<td>When a call arrives</td>
<td>When the agent accepts the call.</td>
<td>Does not trigger.</td>
</tr>
<tr>
<td>When a call is answered</td>
<td>When the customer answers the call.</td>
<td>When the customer answers the call.</td>
</tr>
<tr>
<td></td>
<td>If the agent conferences in another agent or transfers the call, the workflow triggers for the agent who is the recipient of the conference or transfer.</td>
<td>If the agent conferences in another agent or transfers the call, the workflow triggers for the agent who is the recipient of the conference or transfer.</td>
</tr>
<tr>
<td>When a call is made</td>
<td>When the customer call is initiated.</td>
<td>When the customer call is initiated or when failover occurs during the call.</td>
</tr>
<tr>
<td>When a call ends</td>
<td>When the customer call ends.</td>
<td>When the customer call ends.</td>
</tr>
</tbody>
</table>

Add Browser Pop Workflow Action

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

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

Procedure

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

**Step 2**  
In the Name box, enter a name for the action.  
*Note*  
Workflow action names are limited to 64 characters.

**Step 3**  
From the Type drop-down list, select **Browser Pop**.

**Step 4**  
From the Handled By drop-down list, select what will execute the action, either the Finesse Desktop or Other (a third-party gadget).

**Step 5**  
In the Window Name box, enter the name that serves as the ID of the window that is opened. Any action that uses this window name reuses that specific window.  
*Note*  
Window names are limited to 40 characters, and can be blank. If you leave the window name blank, a new window opens every time the action runs.

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

**Example:**

http://www.google.com/search?q=callvariable1&callvariable2

For every variable you select, you can enter test data in the Sample Data box. A sample URL is automatically built in the Browser URL box below the Sample Data area. To test the URL, click Open to open the URL in your browser.  
*Note*  
Finesse does not validate the URL you enter.

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

---

**Add HTTP Request Workflow Action**

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

**Procedure**

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

**Step 2**  
In the Name box, enter a name for the action.  
A workflow action name can contain a maximum of 64 characters.

**Step 3**  
From the Type drop-down list, select **HTTP Request**.

**Step 4**  
From the Handled By drop-down list, select what will execute the action, the Finesse desktop or Other (a third-party gadget).

**Step 5**  
From the Method drop-down list, select the method to use.  
You can select either PUT or POST.

**Step 6**  
From the Location drop-down list, select the location.  
If you are making the HTTP request to a Finesse API, select **Finesse**. If you are making a request to any other API, select **Other**.
Step 7 In the Content Type box, enter the content type. The default content type is application/xml, which is the content type for Finesse APIs. If you are using a different API, enter the content types for that API (for example, application/JSON).

Step 8 In the URL box, enter the URL to which to make the request. To add variables to the URL, click the tag icon at the right of the box and select one or more variables from the drop-down list.

Example:

```
/finesse/api/User/diagId
```

Note The preceding example is the URL for a Finesse API. If you want to make a request to another API, you must enter the entire URL (for example, http://googleapis.com). You can click the tag icon at the right of the box and select one or more variables from the drop-down list to add tags to the URL. In the preceding example, to add the dialogId, click the tag icon and select dialogId from the list.

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

Example:
To make an HTTP request to the Dialog - Start a recording API, enter the following into the Body box:

```
<Dialog>
<requestedAction>START_RECORDING</requestedAction>
<targetMediaAddress>extension</targetMediaAddress>
</Dialog>
```

To add the extension, click the tag icon and select extension. For every variable you add, you can enter test data in the Sample Data box.

Step 10 Click Save.

---

**Edit Workflow Action**

**Procedure**

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

Step 2 Click Edit. The Edit Action area appears.

Step 3 Edit the fields that you want to change.

Step 4 Click Save.
Delete Workflow Action

**Procedure**

**Step 1** In the Workflow Actions gadget, select the action that you want to delete. The Delete Action area appears.

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

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

Add Workflow

**Procedure**

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

**Step 2** In the Name box, enter the name of the workflow.

*Note* The name is limited to 40 characters.

**Step 3** In the Description box, enter a description of the workflow.

*Note* The description is limited to 128 characters.

**Step 4** In the When to perform Actions drop-down list, select the event that triggers the workflow.

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

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

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

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

**Step 8** Click **Save**.

**Step 9** Assign the workflow to one or more teams.

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

Procedure

Step 1 In the Manage Workflows gadget, select the workflow you want to edit.
Step 2 Click Edit. The Edit Workflow area appears.
Step 3 Edit the fields that you want to change.
Step 4 Click Save.

Delete Workflow

Procedure

Step 1 In the Manage Workflows gadget, select the workflow that you want to delete. The Delete Workflow area appears.
Step 2 Click Delete. A question appears asking you to confirm that you want to delete the selected workflow.
Step 3 Click Yes to confirm the deletion of the selected workflow.

Manage Security

The Cisco Finesse administration console and agent desktop support secure HTTP (HTTPS). To access the administration console, enter the following URL in your browser (where hostname is the hostname of your primary server):

https://hostname:8445/cfadmin

Similarly, agents and supervisors can access their desktops as follows:

https://hostname of server:8445/

For HTTPS access, you can eliminate browser security warnings by choosing to trust the self-signed certificate provided with Finesse or uploading a CA certificate.

If you add custom gadgets that perform HTTPS requests to Finesse, you must add a certificate to the Finesse server for that gadget.

Note Wildcard Certificates are not supported in Unified CCX.
Trust Self-Signed Certificate

Trust the self-signed certificate provided by Finesse to eliminate browser warnings each time you sign in to the administration console or agent desktop.

If you are not using HTTPS or if you uploaded a CA certificate, you can skip this procedure.

Procedure

Step 1
In your browser, enter the URL for the administration console (https://hostname of primary server:portnumber/cfadmin) or the agent desktop (https://hostname of primary server).

Step 2
Perform the steps in the following table for the browser you are using.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you use Internet Explorer:</td>
<td>1. A page appears that states there is a problem with the website's security certificate. Click <strong>Continue to this website (not recommended)</strong>. This action opens the sign in page for the administration console (or agent desktop). A certificate error appears in the address bar of your browser.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Certificate Error</strong>, and then click <strong>View Certificates</strong> to open the Certificate dialog box.</td>
</tr>
<tr>
<td></td>
<td>3. On the Certificate dialog box, click <strong>Install Certificate</strong>. This action opens the Certificate Import Wizard.</td>
</tr>
<tr>
<td></td>
<td>4. Click <strong>Next</strong>.</td>
</tr>
<tr>
<td></td>
<td>5. Select <strong>Place all certificates in the following store</strong>, and then click <strong>Browse</strong>.</td>
</tr>
<tr>
<td></td>
<td>6. Select <strong>Trusted Root Certification Authorities</strong>, and then click <strong>OK</strong>.</td>
</tr>
<tr>
<td></td>
<td>7. Click <strong>Next</strong>.</td>
</tr>
<tr>
<td></td>
<td>8. Click <strong>Finish</strong>.</td>
</tr>
<tr>
<td></td>
<td>9. If a Security Warning dialog box appears that asks if you want to install the certificate, click <strong>Yes</strong>.</td>
</tr>
<tr>
<td></td>
<td>A Certificate Import dialog box that states the import was successful appears.</td>
</tr>
<tr>
<td></td>
<td>10. Click <strong>OK</strong>.</td>
</tr>
<tr>
<td></td>
<td>11. Enter your credentials, and then click <strong>Sign In</strong>.</td>
</tr>
</tbody>
</table>

If you use Internet Explorer:
If you use Firefox:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A page appears that states this connection is untrusted.</td>
</tr>
<tr>
<td>2</td>
<td>Click I Understand the Risks, and then click Add Exception.</td>
</tr>
<tr>
<td>3</td>
<td>On the Add Security Exception dialog box, ensure the Permanently store this exception check box is checked.</td>
</tr>
<tr>
<td>4</td>
<td>Click Confirm Security Exception.</td>
</tr>
<tr>
<td></td>
<td>The page that states this connection is untrusted automatically closes and the administration console (or agent desktop) loads.</td>
</tr>
<tr>
<td>5</td>
<td>Enter your credentials, and then click Sign In.</td>
</tr>
<tr>
<td>6</td>
<td>For the agent desktop only, an error appears that states Finesse cannot connect to the Cisco Finesse Notification Service and prompts you to add a security exception for the certificates issued by the Finesse server.</td>
</tr>
<tr>
<td></td>
<td>Click OK.</td>
</tr>
</tbody>
</table>

**Obtain and Upload CA Certificate**

This procedure only applies if you are using HTTPS.

This procedure is optional. If you are using HTTPS, you can choose to obtain and upload a CA certificate or you can choose to use the self-signed certificate provided with Finesse.

To eliminate browser security warnings each time you sign in, obtain an application and root certificate signed by a Certificate Authority (CA). Use the Certificate Management utility from Cisco Unified Communications Operating System Administration.

To open Cisco Unified Communications Operating System Administration, enter the following URL in your browser:

https://hostname of primary Finesse server/cmplatform

Sign in using the username and password for the Application User account created during the installation of Finesse.

You can find detailed explanations in the Security topics of the Cisco Unified Communications Operating System Administration Online Help.

**Procedure**

**Step 1** Generate a CSR.
a) Select **Security > Certificate Management > Generate CSR.**

b) From the Certificate Name drop-down list, select **tomcat**.

c) Click **Generate CSR.**

**Step 2** Download the CSR.

a) Select **Security > Certificate Management > Download CSR.**

b) From the Certificate Name drop-down list, select **tomcat**.

c) Click **Download CSR.**

**Step 3** Generate and download a CSR for the secondary Finesse server.

To open Cisco Unified Operating System Administration for the secondary server, enter the following URL in the address bar of your browser:

https://hostname of secondary Finesse server/cmplatform

**Step 4** Use the CSRs to obtain the CA root certificate, intermediate certificate, and signed application certificate from the Certificate Authority.

**Note** To set up the certificate chain correctly, you must upload the certificates in the order described in the following steps.

**Step 5** When you receive the certificates, select **Security > Certificate Management > Upload Certificate.**

**Step 6** Upload the root certificate.

a) From the Certificate Name drop-down list, select **tomcat-trust**.

b) In the Upload File field, click **Browse** and browse to the root certificate file.

c) Click **Upload File.**

**Step 7** Upload the intermediate certificate.

a) From the Certificate Name drop-down list, select **tomcat-trust**.

b) In the Root Certificate field, enter the name of the root certificate that you uploaded in the previous step. Do not include the extension (for example, TEST Root CA 2048).

c) In the Upload File field, click **Browse** and browse to the intermediate certificate file.

d) Click **Upload File.**

**Step 8** Upload the application certificate.

a) From the Certificate Name drop-down list, select **tomcat**.

b) In the Root Certificate field, enter the name of the intermediate certificate that you uploaded in the previous step. Include the .pem extension (for example, TEST-SSL-CA.pem).

c) In the Upload File field, click **Browse** and browse to the application certificate file.

d) Click **Upload File.**

**Step 9** After the upload is complete, sign out of Finesse.

**Step 10** Restart Cisco Tomcat on the primary Unified CCX node.

**Step 11** Restart Cisco Finesse on the primary Unified CCX node.

**Step 12** Restart Cisco Unified Intelligence Center Reporting Service.

**Step 13** Restart Unified CCX Notification Service.

**Note** It is recommended to delete the self-signed certificates from the clients certificate store. Then close the browser, relaunch and re-authenticate.

**Step 14** Upload the application certificate to the secondary Unified CCX server. You do not need to upload the root and intermediate certificates to the secondary Unified CCX server. After you upload these certificates to the primary server, they are replicated to the secondary server.
Step 15  Restart Cisco Tomcat and Cisco Finesse on the secondary Unified CCX node.

Add Certificate for HTTPS Gadget

Add a certificate for a secure HTTP (HTTPS) gadget to allow the gadget to load into the Finesse desktop and successfully perform HTTPS requests to the Finesse server.

This process allows HTTPS communication between the Finesse gadget container and the third-party gadget site for loading the gadget and performing any API calls that the gadget makes to the third-party server.

Note  A gadget that loads using HTTPS may still use HTTP communication between that gadget and the application server where it resides. If all traffic must be secure, the gadget developer must ensure that HTTPS is used to make API calls to the application server.

The certificate must be signed with a common name. The gadget URL in the desktop layout must use the same name (whether it uses an IP address or a fully qualified domain name) as the name with which the certificate is signed. If the certificate name and the name in the gadget URL do not match, the connection is not trusted and the gadget does not load.

To find the certificate name, enter the gadget URL in your browser. Click the lock icon in the address bar and then click View Details. Look for the common name field.

The Finesse host must be able to resolve this name via DNS, using the DNS host that was entered during installation. To verify that Finesse can resolve the name, run the CLI command "utils network ping <hostname>".

Procedure

Step 1  Download the tomcat.pem certificate from the third-party gadget host.

a) Sign in to Cisco Unified Operating System Administration on the third-party gadget host (http://host or IP address/cmplatform, where host or IP address is the hostname or IP address of the third-party gadget host).

b) Click Security > Certificate Management.

c) Click Find.

d) Click tomcat.pem.

e) Click Download and save the file on your desktop.

Step 2  Upload the certificate to the designated Finesse system.

a) Sign in to Cisco Unified Operating System Administration on the primary Unified CCX node (http://host or IP address/cmplatform, where host or IP address is the hostname or IP address of the Unified CCX node).

b) Click Security > Certificate Management.

c) Click Upload Certificate/Certificate Chain.

d) From the Certificate Name drop-down list, select tomcat-trust.

e) Click Browse and navigate to the tomcat.pem file that you downloaded in the previous step.
f) Click **Upload File**.

**Step 3**  
Restart Cisco Tomcat on the primary Unified CCX node.

**Step 4**  
Restart Cisco Finesse on the primary Unified CCX node.

**Step 5**  
After synchronization is complete, restart Cisco Tomcat on the secondary Unified CCX node.

**Step 6**  
Restart Cisco Finesse on the secondary Unified CCX node.

---

**Add Certificate for Multi-session Chat**

Add the SocialMiner certificate to the Finesse servers to allow communication between SocialMiner and Finesse. After you complete this procedure, agents must accept certificates in the Finesse desktop before they can use this gadget.

If SocialMiner is deployed with private certificates, agents cannot join chat rooms until they accept the SocialMiner certificates. If the multi-session chat gadget is not deployed on the Home tab of the Finesse desktop, agents may not realize that they need to accept the certificates. Have agents check the tab where the multi-session chat gadget appears when they sign in to Finesse to make sure that certificates are all accepted and the gadget loads correctly.

The steps to add a certificate for the multi-session chat gadget are the same as the steps outlined in the procedure Add Certificate for HTTPS Gadget, on page 52.

---

**Note**  
The procedure to add a certificate for an HTTPS gadget refers to the third-party gadget host. To add a certificate for multi-session chat, perform the applicable steps on the SocialMiner server.

---

**CTI Failover**

Finesse follows the active/standby model of Unified CCX. Finesse on the active Unified CCX node is "IN_SERVICE" and Finesse on the standby node is "OUT_OF_SERVICE".

A loss of connection to the CTI server can occur due to the following:

- Finesse misses three consecutive heartbeats from the connected CTI server.
- Finesse encounters a failure on the socket opened to the CTI server.
- The CTI server is not active on the node (Unified CCX is standby on the node).

When Finesse loses connection to the CTI server, Finesse attempts to reconnect until it makes a successful connection to the CTI server.

Cisco Finesse connects successfully through CTI to the node where the Unified CCX Engine is currently master. Agents should log in to Finesse on that node.

When the master Unified CCX Engine fails, Finesse establishes a connection with the Unified CCX Engine on the other node, and agents must log in to other node.
Backup and Restore

The Unified CCX backup and restore component also backs up and restores Finesse configurations and data.


Additional Language Support

For the list of languages that are supported by Finesse, see the Unified CCX Compatibility related information, located at:

If you want to use the Finesse desktop interface in a language other than English, download and install the language COP file. For more information, see the "COP File" section of the Cisco Unified Contact Center Express Install and Upgrade Guide, located at:

Cisco Finesse Agent and Supervisor Desktop

Cisco Finesse Desktop provides easy access to the applications and information sources from a single customizable cockpit. Providing this unique access to information helps the agents deliver fast and accurate service.


Call Manager-Based Call Recording Using Cisco MediaSense

Cisco Finesse in Unified CCX supports call recording using Cisco MediaSense. MediaSense is the media-capture platform for Cisco Unified Communications.

To use MediaSense, perform the following procedures:

1 Configure Cisco MediaSense with Unified CM, on page 55
2 Upload Cisco MediaSense Certificate to Unified CCX Server, on page 55
3 Upload MediaSense Recording License, on page 56
4 Configure MediaSense as a Recording Server, on page 56
5 Call Recording Through Workflow, on page 56
6 Configure MediaSense Search and Play Gadget, on page 57
After performing all of the procedures, restart the Unified CCX server. In high availability deployment, restart both of the nodes.

**Configure Cisco MediaSense with Unified CM**


**Upload Cisco MediaSense Certificate to Unified CCX Server**

To establish connection with Cisco MediaSense securely, you must upload the Cisco MediaSense certificate to Unified CCX server.

**Procedure**

**Step 1** Download the tomcat.pem certificate from the Cisco MediaSense server.
   a) Sign in to Cisco Unified Operating System Administration on the Cisco MediaSense host (https://host or IP address/cmplatform/showHome.do, where host or IP address is the hostname or IP address of the Cisco MediaSense server).
   c) Click Find. A list of certificates appears.
   d) In the Common Name column, click the link of the certificate you want to download. The Certificate Name must be tomcat-trust and the Certificate Type must be trusts-cert. The Certificate Details pop-up window appears.
   e) Click Download .PEM File. A pop-up window appears.
   f) Select Save File radio button and Click OK. The file gets saved on your system.

**Step 2** Upload the certificate to the designated Unified CCX server.
   a) Sign in to Cisco Unified Operating System Administration on the primary Unified CCX node (http://host or IP address/cmplatform, where host or IP address is the hostname or IP address of the Unified CCX node).
   c) Click Upload Certificate/Certificate Chain.
   d) From the Certificate Name drop-down list, select tomcat-trust.
   e) Click Browse and navigate to the tomcat.pem file that you downloaded in the previous step.
   f) Click Upload File.

Upload MediaSense Recording License

To use the MediaSense recording feature, you must purchase the Unified CCX recording license and upload it to the Unified CCX server.

For information about how to upload the license, see Upload Licenses.

Configure MediaSense as a Recording Server

For information about configuring MediaSense as a recording server, see Recording Configuration.

Call Recording Through Workflow

Use the HTTP Request action to invoke the Finesse Recording API after the call is answered.

Procedure

Step 1 Create an HTTP Request Recording action:
   a) In the Manage Workflow Actions area, click New.
   b) In the Name box, enter a name for the action.
   c) From the Type drop-down list, select HTTP Request.
   d) From the Handled By drop-down list, select Finesse Desktop.
   e) From the Method drop-down list, select PUT.
   f) From the Location drop-down list, select Finesse.
   g) In the Content Type box, enter application/xml.
   h) In the URL box, enter the following:
      /finesse/api/Dialog/
      i) Click the tag icon at the right of the box and select dialogId to add it to the URL.
      j) In the Body box, enter the following:
         <Dialog>
         <requestedAction>START_RECORDING</requestedAction>
         <targetMediaAddress>extension<targetMediaAddress>
         </Dialog>
      To add the extension, click the tag icon and select extension.

Example:
Step 2  Click Save to save workflow action.
Step 3  Add a Call Answered Workflow that executes the HTTP Request Recording action that you created in the previous step.
Step 4  Assign the workflow to the teams that you would like to record.

Configure MediaSense Search and Play Gadget

Before You Begin
In the MediaSense server, you must have already configured Unified CM, Cisco Finesse, and MediaSense API.

Procedure

Step 1  Sign in to the Cisco Finesse administration console.
Step 2  Click the Desktop Layout tab.
Step 3  Find the MediaSense tab and gadget in the layout XML. Update the layout according to the comments in the layout.

```xml
<Dialog>
  <requestedAction>START_RECORDING</requestedAction>
  <targetMediaAddress>extension</targetMediaAddress>
</Dialog>
```

The following Tab and Gadget are for MediaSense. They are *ONLY* supported with MediaSense.

If you are not using MediaSense, then remove them. If you are using MediaSense and wish to show Recording Management, then do the following:
1) Remove these comments leaving the tab and gadget
2) Replace all instances of "my-mediasense-server" with the Fully Qualified Domain Name of your MediaSense Server.
IMPORTANT NOTE:
- In order for this Gadget to work, you must have performed all documented prerequisite steps.

```xml
<tab>
  <id>manageRecordings</id>
  <label>finesse.container.tabs.supervisor.manageRecordingsLabel</label>
  <gadgets>
    <gadget>https://my-mediasense-server:8440/ora/gadget/MediaSenseGadget.xml</gadget>
  </gadgets>
</tab>
```

Note Replace all instances of my-mediasense-server with https://<Fully Qualified Domain Name of your MediaSense Server>/ora/gadget/MediaSenseGadget.xml.

Example: https://abcd-ef-gh102.abc.com:8440/ora/gadget/MediaSenseGadget.xml

Step 4 Click Save.

Note The supervisor must log out and log in again to Cisco Finesse Supervisor Desktop to access MediaSense.

Step 5 Sign in to Cisco Finesse desktop as a supervisor and confirm that MediaSense gadget is accessible.