



# Cisco Finesse

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## 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.

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:

- **Settings:** IP Phone Agent Settings.
- **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.

When you sign in to Finesse, always use the fully qualified domain name (FQDN) of the Finesse server in the URL, not the server IP address or hostname.

#### Procedure

**Step 1** Direct your browser to `https://FQDN:8445/cfadmin`, where *FQDN* is the fully qualified domain name of your primary server.

**Step 2** The first time you access the administration console using HTTPS, you are prompted to trust the self-signed certificate provided with Finesse. The following table describes the steps for each supported browser.

**Note** If you are using HTTP to access the administration console, this step is not required.

If you are using HTTPS but have installed a CA Certificate, you can skip this step. For more information about installing a CA Certificate, see the *Cisco Finesse Installation and Upgrade Guide*.

Option	Description
If you use Internet Explorer:	<ol style="list-style-type: none"> <li>a. A page appears that states there is a problem with the website's security certificate. Click <b>Continue to this website (not recommended)</b>. This action opens the sign in page for the administration console. A certificate error appears in the address bar of your browser.</li> <li>b. Click <b>Certificate Error</b>, and then click <b>View Certificates</b> to open the Certificate dialog box.</li> </ol>

Option	Description
	<p>c. In the Certificate dialog box, click <b>Install Certificate</b>. This action opens the Certificate Import Wizard.</p> <p>d. Click <b>Next</b>.</p> <p>e. Select <b>Place all certificates in the following store</b>, and then click <b>Browse</b>.</p> <p>f. Select <b>Trusted Root Certification Authorities</b>, and then click <b>OK</b>.</p> <p>g. Click <b>Next</b>.</p> <p>h. Click <b>Finish</b>.</p> <p>i. If a Security Warning dialog box appears that asks if you want to install the certificate, click <b>Yes</b>.</p> <p>A Certificate Import dialog box appears that states the import was successful.</p> <p>j. Click <b>OK</b>.</p>
If you use Firefox:	<p>a. A page appears that states this connection is untrusted.</p> <p>b. Click <b>I Understand the Risks</b>, and then click <b>Add Exception</b>.</p> <p>c. In the Add Security Exception dialog box, ensure the <b>Permanently store this exception</b> check box is checked.</p> <p>d. Click <b>Confirm Security Exception</b>.</p>

**Step 3** On the Sign-In page, in the ID field, enter the Application User ID that was established during the installation.

**Step 4** In the Password field, enter the Application User password that was established during the installation.

**Step 5** Click **Sign In**.

A successful sign-in launches an interface with defined administration gadgets and a Sign Out link.



**Note** After 30 minutes of inactivity, Finesse automatically signs you out of the administration console and you must sign in again.

### Account Locked After Five Failed Sign In Attempts

If an administrator tries to sign in to the Finesse administrator console (or diagnostic portal) with the wrong password five times in a row, Finesse blocks access to that user account for a period up to 30 minutes. For security reasons, Finesse does not alert the user that their account is locked. They must wait 30 minutes and try again.

Similarly, if agents or supervisors sign in to the desktop five times in a row with the wrong password, Finesse blocks access to that user account. However, in this case, the lockout period is only 5 minutes. This restriction also applies when agents and supervisors sign in using the mobile agent or Finesse IP Phone Agent (IPPA).




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**Note** When an agent or supervisor account is locked, subsequent attempts to sign in, even with correct credentials, reset the lockout period to 5 minutes again. For example, if a locked user tries to sign in again after only 4 minutes, the lockout period is reset and the user must wait another 5 minutes. This reset does not apply to the administrator account.

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To view whether a user account is locked, enter the following CLI command:

**file get activelog desktop recurs compress**

Then extract the zipped output, and search the catalina.out logs (/opt/cisco/desktop/finesse/logs/catalina.out) for the following message referring to the locked username:

An attempt was made to authenticate the locked user "<username>"

## Sign In to Cisco Unified Communications Operating System Administration

### Procedure

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**Step 1** Direct your browser to `https://FQDN:8443/cmplatform`, where *FQDN* is the fully-qualified domain name of your server.

**Step 2** Sign in with the username and password for the Administrator User account.

**Note** After you sign in, you can access other Unified Communications Solutions tools from the Navigation drop-down list.

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## Certificate Management

Finesse provides a self-signed certificate that you can use or you can provide a CA certificate. You can obtain a CA certificate from a third-party vendor or produce one internal to your organization.

Finesse does not support wildcard certificates. After you upload a root certificate signed by a Certificate Authority, the self-signed certificates are overwritten.

If you use the Finesse self-signed certificate, agents must accept the security certificates the first time they sign in to the desktop. If you use a CA certificate, you can accept it for the browser on each client or deploy a root certificate using group policies.




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**Note** If there is a mismatch between the server hostname and the hostname in the certificate, a warning message is displayed in the IE browser about certificate address mismatch. The certificate must be re-generated so that the hostname in the certificate matches the server hostname before importing to Finesse. If there is a valid reason for the mismatch, you can uncheck the **Warn about certificate address mismatch** checkbox from **Tools > Internet Options > Advanced > Security** to allow the certificate to be accepted.

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## Obtain and Upload CA Certificate



**Note** 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 Finesse 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 UCCX server/cmplatform`

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

### Procedure

#### Step 1

Generate a CSR.

- Select **Security > Certificate Management > Generate CSR**.
- From the Certificate Name drop-down list, select **tomcat**.
- Click **Generate CSR**.

You must not download the ECDSA certificate.

#### Step 2

Download the CSR.

- Select **Security > Certificate Management > Download CSR**.
- From the Certificate Name drop-down list, select **tomcat**.
- Click **Download CSR**.

#### Step 3

Generate and download a CSR for the secondary Unified CCX 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 UCCX 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.

- From the **Certificate Purpose** drop-down list, select **tomcat-trust**.
- In the **Upload File** field, click **Browse** and browse to the root certificate file.
- Click **Upload File**.

#### Step 7

Upload the intermediate certificate.

- a) From the **Certificate Purpose** drop-down list, select **tomcat-trust**.
- b) In the **Upload File** field, click **Browse** and browse to the intermediate certificate file.
- c) Click **Upload File**.

**Step 8** Upload the application certificate.

- a) From the **Certificate Purpose** drop-down list, select **tomcat**.
- b) In the **Upload File** field, click **Browse** and browse to the application certificate file.
- c) Click **Upload File**.

**Step 9** After the upload is complete, restart the Cisco Unified CCX server on the primary node.

**Note** Delete the self-signed certificates from the clients certificate store. Then close the browser, relaunch, and reauthenticate.

**Step 10** Upload the application certificate to the secondary Cisco 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 11** Restart the Cisco Unified CCX server on the secondary node.

### Client-Side Certificate Acceptance

The procedures that agents must perform to accept certificates the first time they sign in depends on the method you choose to manage certificates and the browser used by the agents.

#### Related Topics

[Set Up Certificates](#)

### 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 uploaded a CA certificate, you can skip this procedure.

#### Procedure

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

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

Option	Description
If you use Internet Explorer:	<ol style="list-style-type: none"> <li>a. A page appears that states there is a problem with the website's security certificate. Click <b>Continue to this website (not recommended)</b>. 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.</li> <li>b. Click <b>Certificate Error</b>, and then click <b>View Certificates</b> to open the Certificate dialog box.</li> </ol>

Option	Description
	<p>c. In the Certificate dialog box, click <b>Install Certificate</b>. This action opens the Certificate Import Wizard.</p> <p><b>Note</b> If you use Internet Explorer 11, you must add Finesse to your trusted sites before the Install Certificate option appears (<b>Internet Options &gt; Security &gt; Trusted Sites &gt; Sites</b>).</p> <p>After you click <b>Install Certificate</b>, under <b>Store Location</b>, select <b>Current User</b> to install the certificate for the current user only, or select <b>Local Machine</b> to install the certificate for all Windows users who use this computer.</p> <p>d. Click <b>Next</b>.</p> <p>e. Select <b>Place all certificates in the following store</b>, and then click <b>Browse</b>.</p> <p>f. Select <b>Trusted Root Certification Authorities</b>, and then click <b>OK</b>.</p> <p>g. Click <b>Next</b>.</p> <p>h. Click <b>Finish</b>.</p> <p>i. If a Security Warning dialog box appears that asks if you want to install the certificate, click <b>Yes</b>.</p> <p>A Certificate Import dialog box that states the import was successful appears.</p> <p>j. Click <b>OK</b>.</p> <p>k. Enter your credentials, and then click <b>Sign In</b>.</p>
If you use Firefox:	<p>a. A page appears that states this connection is untrusted.</p> <p>b. Click <b>I Understand the Risks</b>, and then click <b>Add Exception</b>.</p> <p>c. In the Add Security Exception dialog box, ensure the <b>Permanently store this exception</b> check box is checked.</p> <p>d. Click <b>Confirm Security Exception</b>.</p> <p>The page that states this connection is untrusted automatically closes and the administration console (or agent desktop) loads.</p> <p>e. Enter your credentials, and then click <b>Sign In</b>.</p> <p>f. 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.</p> <p>Click <b>OK</b>.</p>

### 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.




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**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.

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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 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

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- Step 1** Download the tomcat.pem certificate from the third-party gadget host.
  - 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 (<https://FQDN/cmplatform>, where *FQDN* is the fully qualified domain name 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 Tomcat 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 Tomcat on the secondary Unified CCX node.
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### Add Certificate for Multi-session Chat and Email

Add the SocialMiner certificate to the Unified CCX 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 or reply to email messages until they accept the SocialMiner certificates. If the Manage Chat and Email gadget is deployed on the Manage



Chat and Email tab of the Finesse desktop, agents may not realize that they need to accept the certificates. Have agents check the tab where the 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 Manage Chat and Email gadget are the same as the steps outlined in the procedure **Add Certificate for HTTPS Gadget**.



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

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#### Related Topics

[Add Certificate for HTTPS Gadget](#), on page 8

## Manage System Settings



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**Note** For information about Finesse IP Phone Agent Settings, see **Manage Finesse IP Phone Agent**.

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#### Related Topics

[Manage Finesse IP Phone Agent](#), on page 62

## Context Service Settings

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

Context Service works out of the box with Cisco Customer Collaboration products. Context Service also provides an SDK interface for integration with your own applications or third-party applications to capture end-to-end customer-interaction data.

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

### Context Service Network Connectivity Requirements

Context Service is a cloud-based service and requires that call center components using Context Service to be able to connect to the public Internet.

Context Service uses port 443 (HTTPS).

The following URLs must be added to allowed list in your firewall so that your contact center components can connect to, and receive data from Context Service.

- \*.webex.com
- \*.wbx2.com
- \*.ciscoccservice.com



**Note** Use wildcard URLs in your allowed list because Context Service is accessed through multiple subdomains. Context Service subdomain names can dynamically change.

If you register Context Service by enabling the proxy setting option, configure the browser proxy with the URL specified in the Context Service Management Gadget. Refer to the following links to configure the proxy settings for the related browsers.

Chrome	<a href="https://support.google.com/chrome/answer/96815?hl=en">https://support.google.com/chrome/answer/96815?hl=en</a>
Firefox	<a href="https://support.mozilla.org/en-US/kb/advanced-panel-settings-in-firefox">https://support.mozilla.org/en-US/kb/advanced-panel-settings-in-firefox</a>
Internet Explorer	<a href="http://windows.microsoft.com/en-in/windows/change-internet-explorer-proxy-server-settings#1TC=windows-7">http://windows.microsoft.com/en-in/windows/change-internet-explorer-proxy-server-settings#1TC=windows-7</a>

## Register and Configure Context Service

Registering applications with Context Service is easy if your Cisco Webex Control Hub account has been entitled for Context Service.

For Cisco Context Center on-premise applications, simply use the built-in registration process. A browser window displays and prompts you to log in to Cisco Webex Control Hub. Log in and follow the on-screen instructions to authorize the application to connect to Context Service.

Use the Context Service Management gadget to register Unified CCX with the Context Service.

### Before you begin

Ensure that your web browser allows popups.

When your organization is entitled for Cisco Context Service, you must have received an email requesting a sign-in and a password change. Sign in using the registration email, and change the password. Now your organization is entitled to use Context Service.

If the browser requires a proxy to connect to internet, configure the browser to use proxy. See the browser documentation about configuring proxy.

### Procedure

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- Step 1** Verify the Context Service parameters as specified on the **System Parameters Configuration Web Page**. If Unified CCX server has to access Context Service via HTTP proxy, configure the proxy parameters and select proxy type as HTTP .
- Step 2** If you are not already signed in, sign in to the **Cisco Finesse Administration** console.
- Step 3** To register Unified CCX with the Context Service, in the **Context Service Management** gadget, click **Register**. For more information about Context Service registration, see <https://help.webex.com/community/context-service>.

**Note** If the Unified CCX FQDN is not added as an exception in the blocked popup window settings of the browser, the opened registration and deregistration popup windows do not close automatically. You must manually close the popup windows.

**Step 4** You are prompted to log in and enter your Cisco Webex Control Hub admin credentials to complete the registration.

**Note** If you encounter any issues with the Context Service connectivity and would want to reregister or troubleshoot the issue, click **Deregister**.

During the Registration process, at any time if you wish to cancel the registration, click **Cancel**. If registration fails or context service cannot be reached, you can reregister by clicking the **Register** button.

In case of Context Service failures, you will receive RTMT alerts.

**Note** If using Firefox, enable the **dom.allow\_scripts\_to\_close\_windows** config to ensure that any additional tabs opened for context service registration close as expected. To do this:

- a. Enter `about:config` in the Firefox browser.
- b. Click **I accept the risk**.
- c. Search for `dom.allow_scripts_to_close_windows` config.
- d. Double click to change the value field to `True`.
- e. Restart your browser.

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### What to do next

If context service registration is done by enabling the proxy setting option, configure the browser proxy with the URL specified in the Context Service Management gadget.

## Manage Call Variables Layouts

### Call Variables Layouts

You can use the Call Variables Layouts gadget to define how call variables appear on the Finesse agent desktop. You can configure up to 200 unique Call Variables Layouts (one default layout and 199 custom layouts). As part of this functionality:

- Each layout has a name (required) and description (optional).
- After an upgrade from a release earlier than Cisco Finesse Release 11.0, Finesse migrates the previously configured default layout and assigns it the default name (Default Layout) and description (Layout used when no other layout matches the user layout Custom/ECC Variable).
- You can change the name and description of the default Call Variables Layout.
- You cannot delete the default Call Variables Layout.
- Finesse appends (*Default*) to the name of the default Call Variables Layout.
- To display a custom Call Variables Layout, in the Unified CCX routing script set the `user.layout` ECC variable to the name of a configured Call Variables Layout. In this case, if no custom layouts match the `user.layout` value (or no custom layouts are configured), Finesse displays the default layout.

- Finesse retains the custom layout as specified by the user. Layout ECC variable on CTI server failover. During PG failover, Finesse changes the active call layout to the default layout while retaining the call variables and time indicators.

## Call Variables

Each Call Variables Layout 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
- BACustomerNumber

Columns can be empty.

The administrator can include the following additional fields in the Call Variables Layout. These variables appear as a drop-down list in the call variable gadget which the admin can assign to a layout.

- queueNumber
- queueName
- wrapUpReason

To enable Outbound Option data to appear in Cisco Finesse, the administrator must edit the Default layout to include some or all Outbound Option variables.

## Configure Call Variables Layouts

### Procedure

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- Step 1** From the Manage Call Variables Layouts gadget:
- To create a new Call Variables Layout, click **New**.
  - To modify an existing Call Variables Layout, choose a layout from the list, and click **Edit** (or click **Delete** to remove it).
- Step 2** Under Create New Layout (or under Edit <layout name> when editing an existing layout):
- Enter a name for the Call Variables Layout (maximum 40 characters).
  - Enter a description of the Call Variables Layout (maximum 128 characters).

**Step 3** Under Call Header Layout:

- Enter the display name that you want to appear in the header of the Call Control gadget on the Finesse desktop, for example, Customer Name (maximum 50 characters).
- From the drop-down list, choose the call variable or Outbound Option ECC variable that you want to appear in the header, for example, callVariable3 (maximum 32 characters).

**Step 4** In the Call Body Left-Hand Layout and Call Body Right-Hand Layout areas:

- a) Click **Add Row** to add a new row (or click the “X” to delete a row).
- b) For each row:
  - Enter the display name that you want to appear on the desktop, for example, Customer Name (maximum 50 characters).
  - Enter the corresponding call variable or Outbound Option ECC variable from the drop-down list (maximum 32 characters).

**Step 5** Click **Save** to save the changes, or **Cancel** to discard the changes.

**Note** When you modify the Call Variables 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.

**Step 6** To view the latest configured Call Variables Layout, click **Refresh** from the Manage Call Variables Layouts gadget.

## Add ECC Variables to Call Variables Layout



**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.

### 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.

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**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.

## Assign Call Variables Layouts

### Procedure

**Step 1** In the CCX Editor's Expanded Call Variables tab, create an ECC variable called **user.layout** in the Set Enterprise Call Info Step used in the CCX routing script.

**Note** If both a user.layout and a user.Layout are specified, Finesse will prioritize user.layout over user.Layout. If the layout specified in the user.Layout or user.layout is not found, Finesse will use the Default layout.

- Step 2** Set the value of user.layout to the name of the call variables layout that should be used. The layout name should match the name of a call variables layout that was created on the Call Variables Layout tab in Finesse Administration.
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## Manipulate Call Variables Layouts with a Workflow

You can manipulate the call variables layout that an agent sees when a call is answered by using a workflow. To do so, configure an HTTP Request workflow action and set the value of the ECC variable user.layout to the name of the custom layout to display.

For information about how and when workflows are executed, see **Workflows and Workflow Actions**.

For more details, see the section, "Adding an HTTP Request Workflow Action" in the white paper *Cisco Finesse: How to Create a Screen-Pop Workflow*.

### Related Topics

[Workflows and Workflow Actions](#), on page 53

## Manage Desktop Layout

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



**Important** 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
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## 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



### Important

After a system upgrade, the old desktop layout is retained. If you had a modified desktop layout before upgrade, perform the following steps to ensure you obtain the latest changes:

- Sign in to the Finesse administration console and click the **Desktop Layout** tab.
- Copy the desktop layout to a text file.
- On the Manage Desktop Layout gadget, click **Restore Default Layout**.
- Click **Save**.
- Using the text file of the desktop layout that you saved before the upgrade as a reference, modify the layout to include the changes that you made to the previous layout.
- Click **Save** to save your changes.

If any changes are made to the component IDs or URLs in the default XML layout, the following features may not work as expected.



### Note

The components can be rearranged in any order to show on the Finesse desktop.

Feature	Component ID	URL
Title and Logo	cd-logo	<url>/desktop/scripts/js/logo.js</url>
Voice State control	agent-voice-state	<url>/desktop/scripts/js/agentvoicestate.component.js</url>
Non-voice state control	nonvoice-state-menu	<url>/desktop/scripts/js/nonvoice-state-menu.component.js</url>
Team Message	broadcastmessagepopover	<url>/desktop/scripts/js/teammessage.component.js</url>
Desktop Chat	chat	<url>/desktop/scripts/js/chat.component.js</url>
Dialer	make-new-call-component	<url>/desktop/scripts/js/makenewcall.component.js</url>
Agent identity	identity-component	<url>/desktop/scripts/js/identity-component.js</url>

## 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.





**Note** 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.

```
<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.

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

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

If you want to add multiple columns to a tab on the Finesse desktop, add the gadgets for each column within the columns tags for that tab. You can have up to four columns on a tab.

```
<tab>
  <id>tab-id</id>
  <label>Tab Label</label>
  <columns>
    <column>
      <gadgets>
        <gadget>/gadget/1/url.xml</gadget>
        <gadget>/gadget/2/url.xml</gadget>
      </gadgets>
    </column>
    <column>
      <gadgets>
        <gadget>/gadget/3/url.xml</gadget>
        <gadget>/gadget/4/url.xml</gadget>
      </gadgets>
    </column>
  </columns>
</tab>
```

**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.

## 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 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"/>

  <xs:element name="gadgets"> <!-- 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>
</xs:schema>
```

```

    </xs:complexType>
  </xs:element>

  <xs:element name="page"> <!-- Grouping of a set of persistent 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>

  <xs:element name="tab">
    <xs:complexType>
      <xs:sequence>
        <xs:element ref="id"/> <!-- Id of the tab selector in the desktop -->
        <xs:element ref="label"/> <!-- Label of the tab selector -->
        <xs:element ref="gadgets" minOccurs="0" maxOccurs="1"/>
      </xs:sequence>
    </xs:complexType>
  </xs:element>

  <xs:element name="tabs"> <!-- Grouping of tabs -->
    <xs:complexType>
      <xs:sequence maxOccurs="unbounded">
        <!-- No limit to number of tabs for now -->
        <xs:element ref="tab"/>
      </xs:sequence>
    </xs:complexType>
  </xs:element>

  <xs:element name="layout">
    <xs:complexType>
      <xs:sequence>
        <xs:element ref="role"/> <!-- Type of the role -->
        <xs:element ref="page"/> <!-- List of page gadgets -->
        <xs:element ref="tabs"/> <!-- Grouping of tabs for this particular role -->
      </xs:sequence>
    </xs:complexType>
  </xs:element>

  <xs:element name="finesseLayout"> <!-- Layout of the desktop -->
    <xs:complexType>
      <xs:sequence maxOccurs="3">
        <!-- only support 3 roles for now -->
        <xs:element ref="layout" />
      </xs:sequence>
    </xs:complexType>
  </xs:element>

</xs:schema>

```

## Add Web Chat and Email to Finesse

The Cisco Finesse default layout XML contains commented XML code for Web Chat and Email 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 and Email Control gadget is only supported at the page level. You must ensure that the Chat and Email Control gadget (`<gadget>https://localhost/agentdesktop/gadgets/NonVoiceControl.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.

Procedure	When to use
Add Web Chat and Email to the default desktop layout.	Follow this procedure if you want to add Web Chat and Email to the Finesse desktop after a fresh installation or after an upgrade if you have not customized the default desktop layout.
Add Web Chat and Email to a custom desktop layout.	Follow this procedure if you want to add Web Chat and Email and have customized the desktop layout.
Add Web Chat and Email to a team layout.	Follow this procedure if you want to add Web Chat and Email to the desktop only for specific teams.



**Note** After you add the Web Chat and Email 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 and Email 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

- Step 1** In the Finesse administration console, click the **Desktop Layout** tab.
- Step 2** To add the Chat and Email 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/NonVoiceControl.xml</gadget>
```
- Step 3** Remove the comments and comment characters (`<!--` and `-->`) that surround the gadget, leaving only the gadget (`<gadget>https://localhost/agentdesktop/gadgets/NonVoiceControl.xml</gadget>`).
- Step 4** To add the Manage Chat and Email tab and gadget to the agent desktop, look for the following within the `<tabs></tabs>` tag:
- ```
<tab>
  <id>manageNonVoiceMedia</id>
```

```

<label>finesse.container.tabs.agent.manageNonVoiceMediaLabel</label>
<columns>
  <column>
    <gadgets>
      <gadget>https://my-socialminer-server/multisession/ui/gadgets/
        multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
    </gadgets>
  </column>
</columns>
</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 Chat and Email 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 Chat and Email 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.

**Note** An agent can be configured to handle up to five chat contacts and five email contacts at a time. If the agent has the maximum number of contacts on the desktop, not all contacts are visible. If your agents are configured to handle the maximum number of contacts, you must increase the height of this gadget to a minimum of 570 pixels to ensure there is enough space for all of the contacts to appear.

**Step 8** To add the Chat and Email 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/NonVoiceControl.xml</gadget>

```

**Step 9** Remove the comments and comment characters (<!-- and -->), leaving only the gadget (<gadget>https://localhost/agentdesktop/gadgets/NonVoiceControl.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=F2F1FC17100001440000014E0A4E5D48&
  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 Chat and Email tab and gadget to the supervisor desktop, look for the following within the `<tabs></tabs>` tag:

```
<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.supervisor.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
      <gadgets>
        <gadget>https://my-socialminer-server/multisession/ui/gadgets/
          multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
      </gadgets>
    </column>
  </columns>
</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 Chat and Email gadget.
- Step 18** Click **Save**.

## Add Web Chat and Email 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 and Email Control gadget for the agent desktop.
- ```
<gadget>https://localhost/agentdesktop/gadgets/NonVoiceControl.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/NonVoiceControl.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/NonVoiceControl.xml</gadget>
</page>
```
- Step 6** Copy the code for the agent Manage Chat and Email tab and gadget from the default layout XML.
- ```
<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.agent.manageNonVoiceMediaLabel</label>
  <columns>
```

```

        <column>
          <gadgets>
            <gadget>https://my-socialminer-server/multisession/ui/gadgets/
              multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
          </gadgets>
        </column>
      </columns>
    </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>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.agent.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
      <gadgets>
        <gadget>https://my-socialminer-server/multisession/ui/gadgets/
          multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
      </gadgets>
    </column>
  </columns>
</tab>

```

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

**Step 9** Optionally, change the height of the Manage Chat and Email 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 Chat and Email 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.

**Note** An agent can be configured to handle up to five chat contacts and five email contacts at a time. If the agent has the maximum number of contacts on the desktop, not all contacts are visible. If your agents are configured to handle the maximum number of contacts, you must increase the height of this gadget to a minimum of 570 pixels to ensure there is enough space for all of the contacts to appear.

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

```

<gadget>https://localhost:8444/cuic/gadget/LiveData/
  LiveDataGadget.jsp?gadgetHeight=310&
  viewId=F2F1FC17100001440000014E0A4E5D48&
  filterId=ChatAgentStats.agentId=CL</gadget>

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

```

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

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

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

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

```
<tab>
  <id>manageCall</id>
  <label>finesse.container.tabs.supervisor.manageCallLabel</label>
</tab>
<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.supervisor.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
      <gadgets>
        <gadget>https://my-socialminer-server/multisession/ui/gadgets/
          multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
      </gadgets>
    </column>
  </columns>
</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 and Email 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 and Email Control gadget for the agent desktop and paste it into a text file.

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

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

```
<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.agent.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
```



```

        <gadgets>
          <gadget>https://my-socialminer-server/multisession/ui/gadgets/
            multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
        </gadgets>
      </column>
    </columns>
  </tab>

```

**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.

```

<gadget>https://localhost:8444/cuic/gadget/LiveData/
  LiveDataGadget.jsp?gadgetHeight=310&
  viewId=F2F1FC17100001440000014E0A4E5D48&
  filterId=ChatAgentStats.agentId=CL</gadget>

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

```

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

```

<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.supervisor.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
      <gadgets>
        <gadget>https://my-socialminer-server/multisession/ui/gadgets/
          multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
      </gadgets>
    </column>
  </columns>
</tab>

```

**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 and Email.

**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 and Email 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/NonVoiceControl.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:

```

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

```

**Step 13** To add the Manage Chat and Email 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:

```

<tab>
  <id>manageCall</id>
  <label>finesse.container.tabs.agent.manageCallLabel</label>
</tab>
<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.agent.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
      <gadgets>
        <gadget>https://my-socialminer-server/multisession/ui/gadgets/
          multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
      </gadgets>
    </column>
  </columns>
</tab>

```

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

**Step 15** Optionally, change the height of the Manage Chat and Email 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 Chat and Email 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.

**Note** An agent can be configured to handle up to five chat contacts and five email contacts at a time. If the agent has the maximum number of contacts on the desktop, not all contacts are visible. If your agents are configured to handle the maximum number of contacts, you must increase the height of this gadget to a minimum of 570 pixels to ensure there is enough space for all of the contacts to appear.

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

- 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.
- 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 Chat and Email 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:

```

<tab>
  <id>manageCall</id>
  <label>finesse.container.tabs.supervisor.manageCallLabel</label>
</tab>
<tab>
  <id>manageNonVoiceMedia</id>
  <label>finesse.container.tabs.supervisor.manageNonVoiceMediaLabel</label>
  <columns>
    <column>
      <gadgets>
        <gadget>https://my-socialminer-server/multisession/ui/gadgets/
          multisession-reply-gadget.jsp?gadgetHeight=430</gadget>
      </gadgets>
    </column>
  </columns>
</tab>

```

```

        </column>
    </columns>
</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.

Users	Reports	Report View	Is the Report Available in Default Layout ?	Tab	Gadget URLs
Agent	Agent CSQ Statistics Report	Agent CSQ Statistics Report	Yes	Home	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=76D964AD10000140000000830A4E5E6F&filterId=AgentCSQStats.csqName=CL&compositeFilterId=AgentCSQStats.AgentIds.agentId=loginId</gadget>
Agent	Agent State Log Report	Agent State Log Report	Yes	My Statistics	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=420&viewId=5D411E8A10000140000000230A4E5E6B&filterId=AgentStateDetailStats.agentID=loginId</gadget>
Agent	Agent Statistics Report	Agent Statistics Report	Yes	My Statistics	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=150&viewId=67D4371110000140000001080A4E5E6B&filterId=ResourceIAQStats.resourceId=loginId</gadget>

Users	Reports	Report View	Is the Report Available in Default Layout ?	Tab	Gadget URLs
Agent	Agent Team Summary Report	Agent Team Summary Report	Yes	Home	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=5C626F9C10000140000000600A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
Supervisor	Agent Outbound Team Summary Report	Report since midnight	No	Team Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=FD919FB9100001440000005D0A4E5B29&filterId=ResourceIAQStats.resourceId=CL</gadget>
Supervisor	Agent Outbound Team Summary Report	Short and long term average	No	Team Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=FD919FB510000144000000470A4E5B29&filterId=ResourceIAQStats.resourceId=CL</gadget>
Supervisor	Chat Agent Statistics Report	Chat Agent Statistics Report	No	Team Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=120&viewId=F2F1FC17100001440000014E0A4E5D48&filterId=ChatAgentStats.agentId=CL</gadget>
Supervisor	Chat CSQ Summary Report	Chat CSQ Summary Report	No	Queue Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=120&viewId=E42ED788100001440000007B0A4E5CA1&filterId=ChatQueueStatistics.queueName=CL</gadget>
Supervisor	Email Agent Statistics Report	Email Agent Statistics Report	No	Team Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=BCC5767B1000014F000000580A4D3FA7&filterId=EmailAgentStats.agentId=CL</gadget>
Supervisor	Email CSQ Summary Report	Email CSQ Summary Report	No	Queue Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=13970B4E100001500000021C0A4D3FA7&filterId=EmailQueueStatistics.queueName=CL</gadget>
Supervisor	Team State Report	Team State Report	No	—	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=5C90012F10000140000000830A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>

Users	Reports	Report View	Is the Report Available in Default Layout ?	Tab	Gadget URLs
Supervisor	Team Summary Report	Report since midnight	Yes	Team Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=728283C210000140000000530A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
Supervisor	Team Summary Report	Short and long term average	Yes	Team Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=7291DCB410000140000000890A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
Supervisor	Voice CSQ Agent Detail Report	Voice CSQ Agent Detail Report	Yes	Queue Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=9A7A14CE10000140000000ED0A4E5E6B&filterId=VoiceCSQDetailsStats.agentId=CL&compositeFilterId=VoiceCSQDetailsStats.AgentVoiceCSQNames.agentVoiceCSQName=CL</gadget>
Supervisor	Voice CSQ Summary	Snapshot	Yes	Queue Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=C8E2DB1610000140000000A60A4E5E6B&filterId=VoiceIAQStats.esdName=CL</gadget>
Supervisor	Voice CSQ Summary	Short and long term average	Yes	Queue Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=C8EE241910000140000000C30A4E5E6B&filterId=VoiceIAQStats.esdName=CL</gadget>
Supervisor	Voice CSQ Summary	Report since midnight	No	Queue Data	<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=C8EF510810000140000000EB0A4E5E6B&filterId=VoiceIAQStats.esdName=CL</gadget>

### Gadgets Customization

You can use optional query parameter to adjust height of the gadgets.

### Query Parameter

```
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=200&viewId=5C626F9C10000140000000600A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
```

## 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:

```
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=150&viewId=67D4371110000140000001080A4E5E6B&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:

```
<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=76D964AD10000140000000830A4E5E6F&filterId=AgentCSQStats.csqName=CL&compositeFilterId=AgentCSQStats.AgentIds.agentId=loginId</gadget>
          <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=5C626F9C10000140000000600A4E5B33&filterId=ResourceIAQStats.resourceId=CL</gadget>
        </gadgets>
        <gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=150&viewId=67D4371110000140000001080A4E5E6B&filterId=ResourceIAQStats.resourceId=loginId</gadget>
      </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=5D411E8A10000140000000230A4E5E6B&filterId=AgentStateDetailStats.agentID=loginId</gadget>
        </gadgets>
      </tab>
      <tab>
        <id>manageCall</id>
        <label>finesse.container.tabs.agent.manageCallLabel</label>
      </tab>
    </tabs>
  </layout>
</finesseLayout>
```

```

</tabs>
</layout>
<layout>
  <role>Supervisor</role>
  <page>
    <gadget>/desktop/gadgets/CallControl.jsp</gadget>
  </page>

```

- Step 6** Click **Save**. Cisco Finesse validates the XML file to ensure that it is valid XML syntax and conforms to the Cisco Finesse schema.
- Step 7** To verify, log in to Cisco Finesse agent desktop as agent/Cisco Finesse supervisor desktop as supervisor and check the reports.

---

### Related Topics

[Live Data Gadgets](#), on page 27

## 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.




---

**Note** The new gadget renders the report only when the appropriate permission on that report is given in Cisco Unified Intelligence Center.

---

### 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.

```
<gadget>https://localhost:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310
&viewId=5C90012F10000140000000830A4E5B33&filterId=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.

**Related Topics**

[Live Data Gadgets](#), on page 27

## Live Data Reports

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

### Configure Live Data Reports with Multiple Views

Cisco Finesse allows you to display multiple Live Data reports or views on a single gadget. Supervisors can select the desired view to display from a drop-down list on the gadget toolbar, which lists up to five report views in *Report Name - View Name* format.

This procedure describes how to add multiple Live Data views to the Finesse desktop layout using the viewId\_n and filterId\_n keys. You can specify up to five report views to appear in your gadget. The first view among the five is the default view. There is no defined order for how the remaining views are displayed.

Finesse still supports the display of a single gadget using a single viewId. However, if you specify the single viewId along with multiple viewId\_n keys, the multiple views are used and the single viewId is ignored.



**Note** To make sure the modified gadget renders in the Finesse desktop, you must give the appropriate permission for that report in Unified Intelligence Center.

**Procedure**

**Step 1** For each report or view that you want to include in the gadget, obtain the associated viewId from the permalink for the view:

- a) In Unified Intelligence Center, in Edit view of the report, select the desired view then click **Links**.

The HTML Link field displays the permalink of the customized report.

- b) Copy the permalink of the customized report from the **HTML Link** field, and paste it in a text editor, and then copy the viewID value from the permalink and save it.

**Example:**

Copy the viewId, which is underlined in this example, from the permalink for the report.

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



- Step 2** From the Finesse default layout XML, copy the gadget URL for one of the Live Data reports and paste it into a text editor.

**Example:**

Copy the URL for the Agent Skill Group for HTTPS from the default layout XML and paste it into a text editor:

```
<gadget>https://my-cuic-server:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId_1=9AB7848B10000141000001C50A0006C4&filterId_1=agent.id=CL%20teamName</gadget>
```

- Step 3** To update the URL to refer to a different report view, populate the viewId\_1 value (after the equal sign) with the desired viewId obtained in step 1.

**Example:**

The following shows the URL updated with the example viewId copied from step 1.

```
<gadget>https://my-cuic-server:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId_1=5C90012F10000140000000830A4E5B33&filterId_1=agent.id=CL%20teamName</gadget>
```

- Step 4** For each additional view you want to include:

- a) At the end of the URL, copy and paste the viewId\_1 and agentId\_1 strings with a leading ampersand.

**Example:**

```
<gadget>https://my-cuic-server:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId_1=5C90012F10000140000000830A4E5B33&filterId_1=agent.id=CL%20teamName&viewId_2=5C90012F10000140000000830A4E5B33&filterId_2=agent.id=CL%20teamName</gadget>
```

- b) Update the copied viewId\_1 and filterId\_1 in the URL to the next available integer (in this example, viewId\_2 and filterId\_2).

**Example:**

```
<gadget>https://my-cuic-server:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId_1=5C90012F10000140000000830A4E5B33&filterId_1=agent.id=CL%20teamName&viewId_2=5C90012F10000140000000830A4E5B33&filterId_2=agent.id=CL%20teamName</gadget>
```

- c) Populate the copied viewId value (after the equal sign) with the value defined in the permalink for the desired report (in this example, 99E6C8E210000141000000D80A0006C4).

**Example:**

```
<gadget>https://my-cuic-server:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId_1=5C90012F10000140000000830A4E5B33&filterId_1=agent.id=CL%20teamName&viewId_2=99E6C8E210000141000000D80A0006C4&filterId_2=agent.id=CL%20teamName</gadget>
```

- d) Make sure that the filterId value matches the type required by the report type, as follows:

- Agent Reports: filterId\_N=agent.id=CL%20teamName
- Agent Skill Group Reports: filterId\_N=agent.id=CL%20teamName
- Skill Group Reports: filterId\_N=skillGroup.id=CL%20teamName
- Precision Queue Reports: filterId\_N=precisionQueue.id=CL%20teamName

**Step 5** Replace my-cuic-server with the fully qualified domain name of your Cisco Unified Intelligence Center Server.

**Step 6** Add the customized gadget URL to the desktop layout XML in the Manage Desktop Layout gadget and click **Save**.

**Note** After you add the gadget, sign in to the Finesse desktop and make sure it appears the way you want. If you use a report with a large number of rows, you may want to adjust the gadget height or the screen resolution on the computer used to access the desktop to make the report easier to read or make more rows appear on the screen without the need to scroll.

Agents who are signed in when you change the desktop layout must sign out and sign back in to see the change on their desktops.

## 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
- 300 team phone books

The system supports a total of 50,000 contacts. The total number of contacts per agent across all phone books is limited to 1500.

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.

Field	Explanation
Name	The name of the phone book. The name must be unique, and can be a maximum length of 64 alphanumeric characters.
Assign To	Indicates if the phone book is global (All Users) or team (Teams).
Last Name	The last name of a contact. The last name can be a maximum length of 128 characters. This field is optional.
First Name	The first name of a contact. The first name can be a maximum length of 128 characters. This field is optional.
Number	The phone number for the contact. The phone number can be 1-32 characters long and cannot be blank.

Field	Explanation
Note	Optional text that describes the contact. The note can be a maximum length of 128 characters.

#### 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.

Field	Max Length	Can Be Blank?	Permitted Characters
First Name	128	Yes	<b>Note</b> The CSV file that contains the contacts to import must use Latin encoding.
Last Name	128	Yes	
Phone Number	32	No	
Notes	128	Yes	

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.



**Note** 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 Type header to sort and display system or custom reason codes. 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).



**Note** 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.

Field	Explanation
Reason Label	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.
Type	The type of reason code (System or Custom). The column is default and can be sorted to display both System reason codes and Custom reason codes.
Reason Code	A code for the Not Ready reason. The value of the code must be between 1 and 999 and must be unique.
Global?	Yes/No. Indicates if the reason code is available globally to all agents (Yes) or to specific teams of agents (No).

**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).




---

**Note** During a PG or CTI server failover, the pending state of an agent will not be retained.

---

## 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.
- Note** Not Ready reason code labels are limited to 40 characters.
- Step 3** In the Reason Code box, an auto populated reason code is displayed. If you choose not to save the pre populated reason code, you can enter your own 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**.
- Note** 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 Type header to sort and display system or custom reason codes. 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.

Field	Explanation
Reason Label	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.
Type	The type of reason code (System or Custom). The column is default and can be sorted to display both System reason codes and Custom reason codes.
Reason Code	A code for the Sign Out reason. The code must be between 1 and 999 and must be unique.
Global?	Yes/No. Indicates if the reason code is available globally to all agents (Yes) or to specific teams of agents (No).

### 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.
- Note** Sign Out reason code labels are limited to 40 characters.
- Step 3** In the Reason Code box, an auto populated reason code is displayed. If you choose not to save the pre populated reason, you can enter your own 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.

**Manage Reason Codes (Sign Out)**

Reason Label	Type	Reason Code	Global?
End of Shift	Custom	5804	Yes
Connection Failure	System	255	Yes
Supervisor Initiated	System	999	Yes
Force Logout	System	20002	Yes
System Disconnect	System	50001	Yes
System Failure	System	50002	Yes
Device Error	System	50003	Yes
Inactivity Timeout	System	50004	Yes
Queue Change	System	50020	Yes

**⚠** Are you sure you want to delete the selected Reason Code? (End of Shift)

510223

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

## Predefined System Reason Codes

For Not Ready system reason codes and Sign Out system reason codes, only the reason code label can be edited and saved. The Global attribute and system code cannot be modified. In case the system reason code label is modified and you wish to revert to the default label, refer to the following list of predefined system reason codes:

System Reason Code	Reason Label	Reason Label Description
32767	Logged Out - Device Conflict	The system issues this reason code when an agent is already logged in to one device (computer or phone) and then tries to re-login to a second device.

32765	Logged Out - System Disconnect	The system issues this reason code when a Cisco Finesse IP Phone Agent or Cisco Finesse desktop crashes due to any reason or if the connection is disrupted.
32764	Logged Out - System Standby	The system issues this reason code when the active server becomes the standby server and the agent loses connection to the Unified CCX Platform.
32763	Not Ready - Call Not Answered	The system issues this reason code when the agent fails to answer a Unified CCX call within the specified timeout period.
32762	Not Ready - Offhook	The system issues this reason code when the agent goes off the hook to place a call. If the agent remembers to do this task the corresponding agent-triggered reason code is displayed. If the agent does not remember to do this task, the system issues this reason code.
32761	Not Ready - Non ACD Busy	The system issues this reason code when the agent is logged on to the Cisco Finesse desktop or Cisco Finesse IP phone and then receives a call that is not queued on the Unified CCX Platform.
32760	Not Ready - Log On	The system issues this reason code when an agent logs in and is automatically placed in the Not Ready state.
32759	Not Ready - Phone Failure	The system issues this reason code if the agent's phone crashes and that agent is placed in the unavailable state.
32758	Not Ready - Wrap Up Timer Expiry	The system issues this reason code when an agent's state is changed from WORK to Not Ready. This change occurs if the WORK state for that agent's CSQ is associated with an expired wrap-up timer.
32757	Not Ready - CUCM Failover	The system issues this reason code when the Unified CM fails over and the agent is moved to the Not Ready state.
32756	Not Ready - Phone Working	The system issues this reason code when the agent's phone comes up after it has been through a Phone Down state.
32755	Not Ready - Call Ended	The system issues this reason code when an agent is moved to the Not Ready state after handling a Unified CCX call. This situation occurs in one of two cases: <ol style="list-style-type: none"> <li>1. If an agent (Agent 1) is in the Not Ready state and gets a consult Unified CCX call from another agent (Agent 2). In this case, after handling the call, Agent 1 moves back to the Not Ready state.</li> <li>2. If an agent's Automatic Available option is disabled and this agent gets a Unified CCX call, then this agent goes to the Not Ready state after handling the call.</li> </ol>
32749	Not Ready - Call Cancel	The system issues this reason code when an agent's state is changed from TALKING to Not Ready because of the Cancel feature. The feature is triggered during an ICD consult call between

		two agents. When the consulting agent presses the Cancel softkey on the phone, the consulted agent is no longer associated with an ICD call and their state changes to Not Ready. This feature is only available on some newer phone models.
32754	Not Ready - Restricted Device	The system issues this reason code if the agent device is flagged as a restricted device by the Unified CM Administrator.
32753	Not Ready - Restricted Line	The system issues this reason code if the agent's phone line is flagged as a restricted device by the Unified CM Administrator.
32752	Not Ready - Cancel Reservation Preview Call	The system issues this reason code when an agent receives a preview outbound call and decides to cancel the reservation by pressing "Decline" button on Cisco Finesse desktop.
32751	Not Ready - Skip Preview Call	The system issues this reason code when an agent receives a preview outbound call and skips the call.
32748	Log Out - Agent Deleted	Agent is logged out from Unified CCX as the agent is deleted from Unified Communications Manager. This event is triggered when Unified CCX synchronizes the agent information with Unified Communications Manager.
32750	Not Ready - Extension Modified	The system issues this reason code when an agent is logged out from CCX because the agent's IPCC extension was changed in Unified Communications Manager.
32742	Not Ready - Non ACD Offhook	Agent's state is changed from Ready state to Not Ready state when the monitored Non ICD lines are used for Incoming or Outgoing calls.
32741	Logged Out - Extension Conflict	The system issues this reason code when an agent logs in to Cisco Finesse using an extension number that has already been used by another agent to log in, the first agent is logged out forcibly with this reason code.
32740	Logout - System Initiated Relogin	The system logs out the agent from one session when the agent tries to log in with the same credentials in another session.
33	Not Ready - Supervisor Initiated	The system issues this reason code when the Supervisor changes an agent's state to Not Ready state.
22	Logged Out - Supervisor Initiated	The system issues this reason code when the Supervisor changes an agent's state to log out.
255	Logged Out - Connection Failure	The system issues this reason code when the agent is forcibly logged out when there is a connection failure between the Cisco Finesse Desktop and the Cisco Finesse Server.

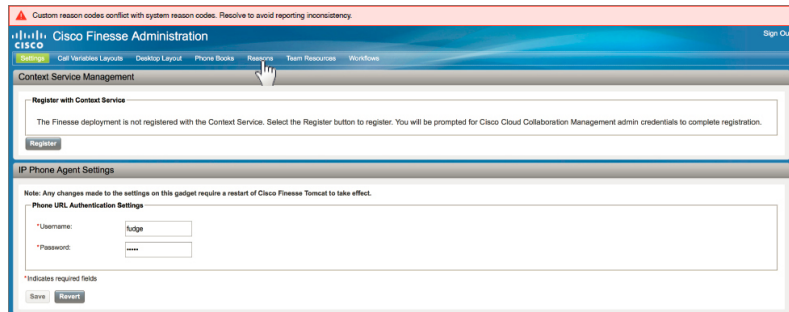
## Manage Reason Code Conflicts During Upgrade

System Reason Codes are auto generated reason codes that may conflict with custom reason codes when upgrading from an older version to Cisco Finesse 11.6(1) or higher versions. If there is a reason code conflict then the following message appears when you sign in to the administration console:

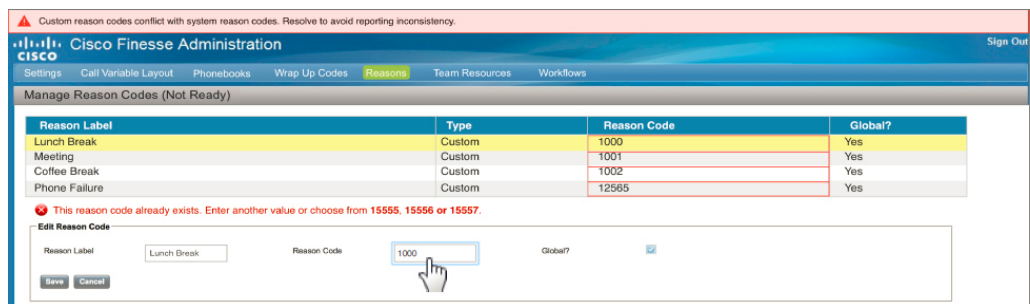
**Custom reason codes conflict with system reason codes. Resolve to avoid reporting inconsistency.**



**Note** Clear your browser cache to ensure that you are allowed to view and resolve system reason code conflicts.



All conflicting reason codes are highlighted. To edit, select each conflicting reason code and click **Edit**. The **Edit Reason Code** area appears. Select the reason code from the available options listed or enter any other code you wish. The code must be unique to the particular category (Not Ready or Sign Out).



Once resolved, the reason code gets sorted based on the reason code number and placed in the table accordingly.

## 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 1500 team Wrap-Up reasons. No more than 100 Wrap-Up reasons can be assigned to any one team.



**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 the pending state selected during the call.

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

Field	Explanation
Reason Label	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.
Global?	Yes/No. Indicates if the Wrap-Up reason is available globally to all agents (Yes) or to specific teams of agents (No).

#### 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




---

**Note** 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

---

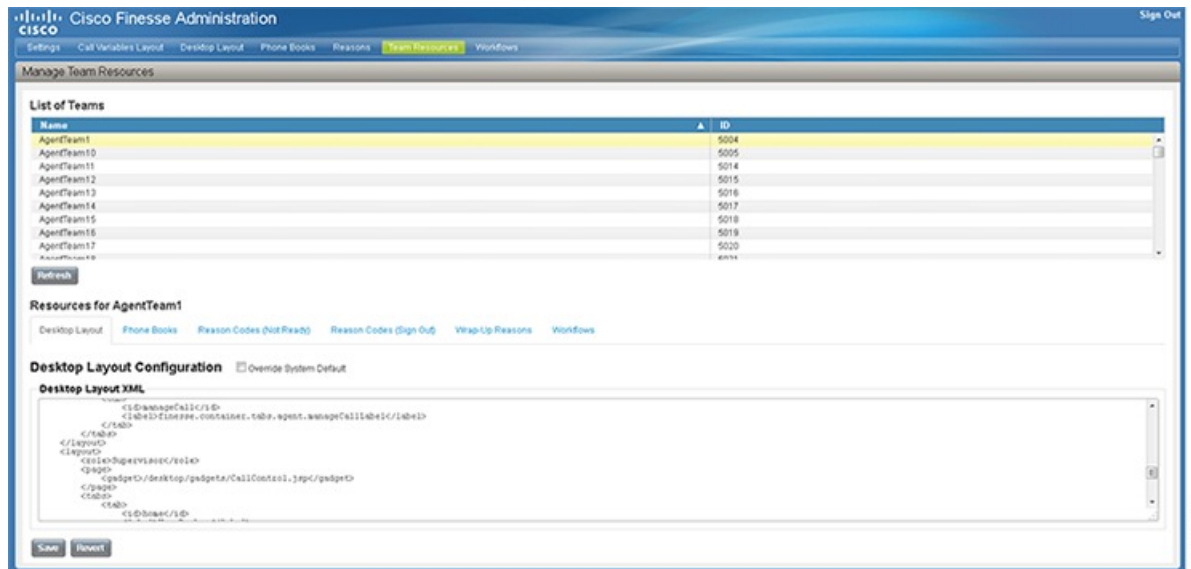
- Step 1** In the Manage Wrap-Up Reasons gadget, select the Wrap-Up reason that you want to delete.
  - Step 2** Click **Delete**.  
A question appears asking you to confirm that you want to delete the selected Wrap-Up reason.
  - Step 3** Click **Yes** to confirm the deletion of the selected Wrap-Up 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 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.

Tab Name	Description
Desktop Layout	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.
Phone Books	Use this tab to assign and 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.
Reason Codes (Not Ready)	Use this tab to assign and 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.
Reason Codes (Sign Out)	Use this tab to assign and 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.
Wrap-Up Reasons	Use this tab to assign and 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.
Workflows	Use this tab to assign and unassign workflows to the team. Only workflows that are defined in the Manage Workflows gadget are available for assignment.

### 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 deselected and the Resources area for that team disappears. The list of teams is refreshed and you must select a team again.

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### Add or Delete a Team When Database Is Not Accessible

If you add or delete a team when Finesse cannot access the Finesse database, those changes do not appear in the Finesse administration console unless you restart Cisco Finesse Tomcat or the Cisco Unified CCX Engine.

## Assign Phone Books and Reasons to 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 assign for the selected team.  
The List of <resource> area appears.
- 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.

**Note** 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.

---



**Note** If the Supervisor is managing single / multiple teams, the custom layout of the team for which he is a resource / agent is displayed. However, if he is not a resource / agent of the team, the layout of the default team is displayed.

---

## 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 have 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.

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

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

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

#### Actions on the Manage Workflows and Manage Workflow Actions gadgets:

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

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

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

- When a call arrives
- When a call is answered




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

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- When a call ends
- When making a call
- While previewing a Direct Preview Outbound call.

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

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



---

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

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

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



---

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

---

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

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

Individual conditions consist of the following:

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

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

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




---

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

---

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

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

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

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

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

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

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

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

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

## Workflow Triggers and Outbound Calls




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

---



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

Workflow Trigger	Direct Preview Outbound Call	Progressive or Predictive Outbound Call
While previewing a call	When the agent previews the call (before the agent accepts or rejects the call).	Does not trigger.
When a call arrives	When the agent accepts the call.	Does not trigger.
When a call is answered	When the customer answers the call.  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.	When the customer answers the call.  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.
When a call is made	When the customer call is initiated.	When the customer call is initiated or when failover occurs during the call.
When a call ends	When the customer call ends.	When the customer call ends.

## Add Browser Pop Workflow Action

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



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

### Procedure

- Step 1** In the Manage Workflow Actions gadget, click **New**.  
The New Action area appears.
- 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.
- Note** The drop-down list contains variables from all the media channels.

**Example:**

```
/finesse/api/User/ dialogId 
```

**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 *FQDN* is the fully qualified domain name of your primary server):

`https://FQDN:8445/cfadmin`

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

`https://FQDN: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.

---

## HSTS

Finesse supports HTTP Strict Transport Security (HSTS) for increased security. HSTS is automatically enabled, in which case the Finesse server sends HTTPS responses indicating to browsers that Finesse can only be accessed using HTTPS. If users then try to access Finesse using HTTP instead of HTTPS, the browser changes the connection to HTTPS before generating any network traffic. This functionality prevents browsers from sending requests to Finesse using unencrypted HTTP before the server can redirect them.

# Manage Finesse IP Phone Agent

## Finesse IP Phone Agent

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

### Supervisor Tasks

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

### Administration Tasks

After you configure Finesse IPPA, the administration tasks that you perform for the Finesse desktop also apply for the supported Finesse IPPA features. For example, the Call Variables Layouts that you configure for the desktop also apply for Finesse IPPA, although the column layout is modified to fit the IP Phone screen.

### Reason Code Limitations

- On the IP Phone, Finesse can display a maximum of 100 Not Ready, Wrap Up, or Sign Out reason codes. If more than 100 codes are configured, the phone lists the first 100 applicable codes (global codes or applicable team codes).
- When Finesse IPPA displays reason codes, some IP Phone models truncate the codes due to character length limitations on the phone. To ensure they meet your requirements, verify the display of the reason codes on all phone models in your environment.

### HTTP Only

Finesse IPPA phone clients communicate with the Finesse server using HTTP only, whether or not HTTPS access is enabled on Finesse.

### Failure Behavior

Unlike the Finesse desktop, the Finesse IP Phone Agent does not automatically failover to the alternate Finesse server. To resume normal operations in a failure scenario, the Finesse IPPA agents must exit from the current Finesse IP Phone service and manually sign in to another configured Finesse service that connects to an alternate Finesse server.

To ensure continued operations in a failure situation, you must configure at least two Finesse IP Phone services in Unified CM, each pointing to different Finesse servers.

## One Button Sign In

With One Button Sign In, you can set up the Finesse IPPA phones with prepopulated agent ID, extension, and password. In this case, agents can sign in to Finesse on the IP Phone without credentials just by selecting Cisco Finesse from the Services menu.

Alternatively, you can set up One Button Sign In and prepopulate only a subset of agent credentials. For example:

- You can prepopulate only the agent ID and extension, forcing the agents to manually enter their password at sign-in for increased security.
- You can prepopulate only the extension, forcing agents to manually enter their ID and password at sign-in (useful for agents who share the same phone).

You can use Unified CM Administration to prepopulate the agent credentials, or you can set up the agents with access to the Unified CM Self Care Portal to prepopulate their own credentials.

The following table shows examples of how you can assign the responsibility of defining agent credentials to the administrator or the agent, or share that responsibility between them.

<b>Example Set Up</b>	<b>Prepopulated in Unified CM Administration (by Administrator)</b>	<b>Prepopulated in Self Care Portal (by Agent)</b>	<b>Entered at Sign-In (by Agent)</b>
<b>Administrator populates the extension only</b>	extension	-	id password
<b>Administrator populates the ID and extension</b>	id extension	-	password
<b>Agents enter password only using Self Care Portal</b>	id extension	password	-
<b>Agents enter all credentials using Self Care Portal</b>	-	id extension password	-
<b>Agents enter ID and extension only using Self Care Portal</b>	-	id extension	password

## Finesse IP Phone Service Subscription Options

To set up access to Finesse on agent IP phones in Cisco Unified Communications Manager, you must create the Finesse IP Phone service to which the phones can subscribe. To set up the Finesse service, you can choose one of the following options:

- Set up an enterprise subscription to automatically subscribe all IP phones in the cluster to the Finesse service. (Not supported with One Button Sign In.)
- Set up a manual subscription, and manually subscribe each IP phone to the Finesse service.
- Set up a manual subscription, and set up the agents with access to the Unified CM Self Care Portal to subscribe to the Finesse service themselves.

The following table lists the Finesse IPPA configuration procedures and indicates which procedures are required depending on the subscription option you choose.

Finesse IPPA Configuration Procedures	Enterprise Subscription	Manual Subscription	
		Administrator Manually Subscribes the Phones	Agents Manually Subscribe Their Phones Using the Self Care Portal
<a href="#">Set Up Application User, Web Access, and HTTPS Server Parameters, on page 64</a>	Required	Required	Required
<a href="#">Configure Finesse IP Phone Service in Unified CM, on page 65</a>	Required	Required	Required
<a href="#">One Button Sign In, on page 62</a>	Not applicable	Required only with One Button Sign In	Required only with One Button Sign In
<a href="#">Subscribe Agent Phones to Manual Subscription Service, on page 69</a>	Not applicable	Required	Optional. Allows the administrator to enter agent credentials for One Button Sign In.
<a href="#">Set Up Agent Access to the Self Care Portal, on page 70</a>	Not applicable	Optional. Allows agents to enter their own credentials for One Button Sign In.	Required

## Set Up Application User, Web Access, and HTTPS Server Parameters

To support Finesse IPPA functionality, you must configure an application user in Unified Communications Manager that is associated with all Finesse IPPA phones. And for proper Finesse IPPA operation, you must also set the Web Access and HTTPS Server parameters in Unified CM.

These steps are required for both manual and enterprise subscriptions.

### Before you begin

Set up call capabilities for the agent phones in Cisco Unified Communications Manager.

### Procedure

**Step 1** Set the following parameters in Unified CM:

- Set the **Web Access** parameter to **Enabled**.
- Set the **HTTPS Server** parameter to **HTTP and HTTPS Enabled**.

To set these parameters in Cisco Unified CM Administration, use either of the following pages:

- Phone Configuration page (Product Specific Configuration portion of page): choose **Device > Phone**.
- Enterprise Phone Configuration page: choose **System > Enterprise Phone Configuration**.

**Step 2** Configure an application user in Unified Communications Manager.



- a) In Cisco Unified Communications Manager Administration, select **User Management > Application User**.
- b) Click **Add New**.
- c) Under User Information, enter a user ID and password for the new user.  
The password must be 95 characters or less and must contain ASCII characters only.
- d) Under Device Information, in the Available Devices pane, select all phones that Finesse IP Phone Agents will use and move them to the Controlled Devices pane using the arrows.
- e) Under Permissions Information, click **Add to Access Control Group**.
- f) From the list of search results, select **Standard CTI Enabled** and **Standard CTI Allow Control Of All Devices** and then click **Add Selected**.

The application user is added to the Standard CTI Enabled and Standard CTI Allow Control Of All Devices groups.

- g) Click **Save** at the bottom of the page.

**Note** In UCCX deployments, usage of an existing RMCM User for Finesse IPPA is known to cause problems in functionality, however, the physical phones must be associated with the RMCM User.

**Step 3** Enter the application user's credentials in the Finesse IP Phone Agent Settings gadget.

- a) Sign in to the Cisco Finesse Administration Console.
- b) Choose **Settings > IP Phone Agent Settings**.
- c) Under Phone URL Authentication Settings, enter the same username and password that you entered in Unified CM for the application user.

The password must be 95 characters or less and must contain ASCII characters only.

- d) Click **Save**.
- e) Restart Cisco Finesse Tomcat on the primary Unified CCX node.
- f) After replication is complete, restart Cisco Finesse Tomcat on the secondary Unified CCX node.

For information to check the replication status, see Step 3 of **Prepare System for IP Address/host name Change**.

**Note** For Finesse IP Phone Agent (FIPPA) from 11.0 (1) onwards, the User Device Profile (UDP) must be associated with the FIPPA Application User along with the physical phones for agents using Extension Mobility. The Finesse Service URL must use the complete FQDN of the UCCX server.

---

#### Related Topics

[Prepare System for IP Address/hostname Change](#)

## Configure Finesse IP Phone Service in Unified CM

The following procedure describes the steps required for both manual and enterprise subscription.

#### Procedure

---

- Step 1** Log in to the Cisco Unified Communications Manager Administration using administrator credentials.
- Step 2** From the Communications Manager menu, select **Device > Device Settings > Phone Services**.

- Step 3** On the IP Phone Services page, click **Add New** to create a new IP phone service.
- Step 4** In the **Service Name** field, enter **Cisco Finesse** (or another service name that is appropriate for your environment).
- Step 5** In the **Service URL** field, enter:  
`http://Finesse FQDN:8082/fippa/#DEVICENAME#`  
 where *Finesse FQDN* is the fully qualified domain name (FQDN) of your primary Finesse server.
- Step 6** Ensure that the **Service Category** is set to **XML Service**, and the **Service Type** is set to **Standard IP Phone Service**.
- Step 7** Check the **Enable** check box.
- Step 8** Do one of the following:
- To automatically subscribe all phones in the cluster to the Finesse service, check the **Enterprise Subscription** check box, and click **Save**. Agents and supervisors can now access Cisco Finesse by selecting it from the **Services** menu on subscribed IP phones.

**Note** One Button Sign In is not supported with enterprise subscriptions.

**Figure 1: Finesse Service Configuration with Enterprise Subscription**

The screenshot displays the Cisco Unified CM Administration interface for configuring an IP Phone Service. The page title is "IP Phone Services Configuration". At the top, there is a navigation menu with options: System, Call Routing, Media Resources, Advanced Features, Device, and Application. Below the navigation menu is a "Save" button. The main content area is divided into sections:

- Status:** Shows "Status: Ready" with an information icon.
- Service Information:** Contains the following fields:
  - Service Name\*: Cisco Finesse
  - Service Description: Cisco Finesse
  - Service URL\*: http://finesse FQDN, hostname, or IP address>:<port>
  - Secure-Service URL: (empty)
  - Service Category\*: XML Service
  - Service Type\*: Standard IP Phone Service
  - Service Vendor: (empty)
  - Service Version: (empty)
- At the bottom of the Service Information section, there are two checked checkboxes:
  - Enable
  - Enterprise Subscription
- At the very bottom, there is another "Save" button with a mouse cursor pointing to it.

- To subscribe only the desired phones to the Finesse service manually, leave the **Enterprise Subscription** check box unchecked and click **Save**.

Figure 2: Finesse Service Configuration Without Enterprise Subscription

**Step 9** With a two-node Finesse setup (primary and secondary Finesse servers), perform the preceding steps again to create a secondary Finesse service that points to the secondary Finesse server. When you create the secondary service, note the following procedural differences:

- At Step 4, in the **Service Name** field, enter a name that distinguishes the secondary service from the primary service, such as **Cisco Finesse Secondary**.
- At Step 5, in the **Service URL** field, replace *Finesse FQDN* with the FQDN of the secondary server.

**Note** Since Finesse IPPA works only over HTTP, avoid using Secured Phone URL Parameters in Unified CM.

## Add Service Parameters for One Button Sign In

With One Button Sign In, for any agent credentials that you want prepopulated, you must set up corresponding service parameters in Unified CM.

Only perform this procedure if you are setting up One Button Sign In. Otherwise, skip this procedure.

## Procedure

- Step 1** From Cisco Unified Communications Manager Administration, select the Finesse phone service (under **Device > Device Settings > Phone Services**).
- Step 2** Click **New** to the right of the Parameters box.  
The Configure Cisco IP Phone Service Parameter page displays.
- Step 3** Set up service parameters for the agent id, extension, and password credentials in accordance with the following table. Enter only the parameters that you want prepopulated for the agents. For each parameter, enter the required field values and click **Save**. To add additional parameters, click **Add New** and enter the required values.

Field	Description
<b>Parameter Name</b>	Enter one of the following parameter names as follows: <ul style="list-style-type: none"> <li>• Id</li> <li>• extension</li> <li>• password</li> </ul> <p>The values entered are the exact query string parameters used for the subscription URL.</p>
<b>Parameter Display Name</b>	Enter a descriptive parameter name; for example, id, extension, and password.
<b>Default Value</b>	Leave the default value blank for all parameters.
<b>Parameter Description</b>	Enter a description of the parameter. The user can access this text when they subscribe to the service.
<b>Parameter is Required</b>	If the administrator will prepopulate the parameter in Unified CM Administration, check the <b>Parameter is Required</b> check box.  However, if the agent will prepopulate the parameter in the Self Care Portal, two options are available: <ul style="list-style-type: none"> <li>• If the agents will prepopulate all defined parameters, check the <b>Parameter is Required</b> check box for each parameter.</li> <li>• If the agent and administrator will share the responsibility of prepopulating the parameters, set only the administrator-defined parameters as required. This configuration ensures that the administrator can save the subscription without prepopulating all parameters. In this case, the administrator first prepopulates the required parameters, and then the agents prepopulate the nonrequired parameters.</li> </ul>
<b>Parameter is a Password (mask contents)</b>	Check this check box for the password only.  This check box masks the password entries in the Self Care Portal, to display asterisks rather than the user entry.

When you save the last parameter, click **Save and Close**.

### What to do next

You can prepopulate the agent credentials when you subscribe the agent phones, or the agents can prepopulate their own credentials using the Unified CM Self Care Portal.

## Subscribe Agent Phones to Manual Subscription Service

If you set up the Finesse service as a manual subscription, you can subscribe the agent phones to the Finesse service in Unified CM and optionally define agent credentials for One Button Sign In.

If you prefer to allow the agents subscribe to the Finesse service using the Self Care Portal and prefer not to specify One Button Sign In credentials for the agents, you can skip this procedure.

### Procedure

- Step 1** From the menu bar, select **Device > Phone**.
- Step 2** Select the phone that you want to subscribe to the Finesse service.
- Step 3** From the **Related Links** drop-down list on the upper right side of the window, select **Subscribe/Unsubscribe Services** and click **Go**.  
The **Subscribed IP phone services** window displays for this phone.
- Step 4** From the **Select a Service** drop-down list, select **Cisco Finesse**.
- Step 5** Click **Next**.
- Step 6** (*Applicable for One Button Sign In only*) Enter values for any of the defined service parameters (id, password, and extension) that you do not want the agents to enter using the Self Service Portal or at sign-in.
- Step 7** Click the **Subscribe** button to subscribe this phone to the Cisco Finesse service.

The Cisco Finesse service displays in the **Subscribed Services** list.

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

The subscribed agents or supervisors can now access Cisco Finesse by selecting it from the **Services** menu on their IP phones.

**Step 9** With a two-node Finesse setup (primary and secondary Finesse servers), perform this procedure again to also subscribe the phones to the secondary Finesse service that points to the secondary Finesse server.

## Set Up Agent Access to the Self Care Portal

You can optionally set up the agents with access to the Unified CM Self Care Portal to prepopulate their own credentials and to subscribe to the Finesse service.

If you are not setting up One Button Sign In, or not enabling the agents with access to the Self Care Portal, skip this procedure.

### Procedure

- Step 1** From the Unified CM Administration page, select **System > Enterprise Parameters**.
- Step 2** Under the Self Care Portal Parameters, in the **Self Care Portal Default Server** field, select the IP address of the Unified CM Publisher server from the drop-down list and click **Save**.
- Step 3** Select **User Management > End User**.
- Step 4** Select the user that you want to set up with access to the User Care Portal.
- Step 5** Under Permissions Information, click **Add to Access Control Group**.
- Step 6** From the list of Access Control groups displayed, check **Standard CCM End Users** and click **Add Selected**.
- Step 7** Click **Save**.

With access enabled to the Self Care Portal, agents can sign in to the portal at `http://<UCM address>/ucmuser` to subscribe to the Finesse service and enter their own credentials under **Phones > Phone Settings > Services**.



**Note** In a two-node Finesse setup with two services configured, the agents must enter their credentials on both the primary and secondary Finesse services.

## Backup and Restore

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

For more information about backup and restore, see *Cisco Unified Contact Center Express Administration and Operations Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-maintenance-guides-list.html>

## Additional Language Support

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

<https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-device-support-tables-list.html>.

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:

<https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-installation-guides-list.html>.

## 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.

For more information about Cisco Finesse Agent and Supervisor Desktop, see *Cisco Finesse Agent and Supervisor Desktop User Guide for Cisco Unified Contact Center Express* at [https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products\\_user\\_guide\\_list.html](https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products_user_guide_list.html).

## 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 71](#)
2. [Upload Cisco MediaSense Certificate to Unified CCX Server, on page 72](#)
3. [Upload MediaSense Recording License, on page 72](#)
4. [Configure MediaSense as a Recording Server, on page 73](#)
5. [Call Recording Through Workflow, on page 73](#)
6. [Configure MediaSense Search and Play Gadget, on page 74](#)



---

**Note** 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

For information about configuring Cisco MediaSense with Unified CM, see the "Unified CM provisioning for Cisco MediaSense" section in the *Installation and Administration Guide for Cisco MediaSense* at [https://www.cisco.com/en/US/products/ps11389/prod\\_installation\\_guides\\_list.html](https://www.cisco.com/en/US/products/ps11389/prod_installation_guides_list.html).

## 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).
- b) Select **Security > Certificate Management**.  
The **Certificate List** screen appears.
- c) Click **Find**.  
A list of certificates appears.
- d) In the **Common Name** column, click the link of the certificate you want to download.  
**Note** 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).
- b) Choose **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**.

For more information about certificate management, see the **Certificate Management Menu** section of the *Cisco Unified Operating System Administration Guide*, at [https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products\\_installation\\_and\\_configuration\\_guides\\_list.html](https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products_installation_and_configuration_guides_list.html).

---

## 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](#).

#### Related Topics

[Upload Licenses](#)

## Configure MediaSense as a Recording Server

For information about configuring MediaSense as a recording server, see [Recording Configuration](#).

#### Related Topics

[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>
```

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To add the extension, click the tag icon and select **extension**.

#### Example:

**Edit Action**

Name

Type

Handled by

---

Method

Location

Content Type

URL

Body

372949

**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.

**Note** The Call Answered Workflow can be used to trigger an HTTP Request Recording action for inbound calls, agent-initiated outbound calls, and Predictive, Progressive, and Direct Preview outbound calls.

**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.

```
<!--
  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.

```
<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.

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