Cisco Finesse Desktop Interface

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

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Finesse Agent Desktop

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

After you sign in, you can change your status to Ready to make yourself available for calls. The buttons in the call control area change depending on the situation.

For example, the following buttons are available in the described situations:

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

Finesse provides a separate state control for chat and email. If you handle chat and email contacts, you must change your status to Ready on the Chat and Email Control gadget.

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

- Basic call control: Answer, hold, retrieve, end, and make calls.

- Toaster Notifications: Notification that informs of any voice, chat, email, or Digital Channel requests when the Finesse desktop window or tab is inactive.

- Desktop notifications: Popover that informs of any voice, chat, or email requests.

- Advanced call control: Make a consult call and transfer or conference the call after the consultation.

- Agent state and call timers: The agent state timer indicates the duration in Ready or Not Ready state. The call timer indicates total call time, hold time, and wrap-up time.

- Schedule a callback: Schedule a callback for an Outbound Dialer call to call a customer back at a more convenient time.

- Preview Outbound Personal Callback calls: After you preview a personal callback call, you can choose to accept or reject the contact.

- Direct Preview Outbound calls: Preview the customer information for the call before you choose to accept, reject, or close the contact.

- Reclassify a Direct Preview Outbound call: If you do not reach the customer, you can reclassify the call as Answering Machine, Fax/Modem, Busy, or Invalid Number.

- Send DTMF digits: Send DTMF digits to interact with an IVR system.

- Not Ready and Sign Out reasons: Reasons to indicate why you are changing your status to Not Ready or Sign Out (your administrator defines these reasons).

- Wrap-Up Reasons: You can select upto five Wrap-Up Reasons for each call (your administrator defines the Wrap-Up Reasons).

- Phonebooks: List of contacts from which you can select one to call (your administrator defines what contacts appear in your phonebook).

- Workflows: Your administrator can define workflows that are triggered by call and digital channels events (for example, your administrator may create a workflow that causes a browser pop on your desktop when a call arrives).

- Live Data reports

- Web Chat: Accept, interact, end chat sessions, and other chat enhancements discussed in detail in the respective sections in this guide.

- Group Chat: Initiate, accept, decline, interact, end chat sessions, and other chat enhancements discussed in detail in the respective sections in this guide.

- Email: View, reply to customer email messages, and other email enhancements discussed in detail in the respective sections in this guide.

- Language support: If your administrator installed Finesse language packs, when you sign in to Finesse, you can choose from a list of supported languages for the desktop.

- Direct Transfer: You can directly transfer the calls to another agent without any consult.

- System Reason Codes: Due to system generated events, your state may change to either Not Ready or Sign Out with system generated reason codes. In this case, agent state is displayed in yellow.

- Desktop Chat: You can chat with other agents, supervisor, or with other Subject Matter Experts in the organization.

- Making a Call: You can make a call from the dialpad, by either entering the number or using the one-click option in the phone book.

- Team Message: Teams can view the messages sent by their repective supervisors and take necessary action.

The functionality available to you depends on what your administrator has configured. For example, if your administrator did not define Wrap-Up Reasons, you cannot choose a wrap-up reason.

Finesse Supervisor Desktop

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

Finesse Supervisor Desktop provides call control functionality and the following:

- Team Performance gadget

- Live Data gadget

- Team Message

Note To ensure all features of the Finesse supervisor desktop work properly, you must disable pop-up blockers.

Team Performance Gadget

On the Team Performance gadget, you can select a team from a list of teams assigned to you. You can view the agents on that team, their current state, the time in state, their recent call history, and state history and their extension. Click the column headers to sort the information by Agent Name, State, Time in State, or Extension.

The Time in State field refreshes every 10 seconds. When an agent's state changes, the Finesse server sends out an agent state notification and the timer resets to 0. An agent state change includes changing from Not Ready with a reason code to Not Ready with a new reason code.

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

Team Performance gadget also provides the following functionality:

- Silent monitoring: Silently monitor an agent's call.

- Force state change: Force an agent into Ready or Not Ready state or sign out an agent.

When you silently monitor an agent, the **Barge In** button appears in the call control area. Click this button to barge in to a call between the agent and customer. After you barge in, you can choose to intercept the call by dropping the agent.

Team Message

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

State and Call Timers

The agent state timer appears next to the agent state drop-down when you are in Not Ready or Ready state. This timer updates every second and the format is mm:ss. If you are in any state for more than one hour, the format changes to hh:mm:ss (for example, 05:25 or 01:10:25).

When you change state (for example, from Not Ready to Ready or change the reason code of Not Ready), the timer resets to 00:00.

Finesse provides a separate state control for chat and email. This state control does not have a timer.

The Finesse desktop provides call timers in the Call Control gadget (in the format mm:ss). The call timers provide the following information:

  • Total Call Time: Indicates the duration of your current call.

  • Hold Time: Indicates the total call on hold time. When you place a call on hold, this timer shows the hold time, followed by the total call time in parentheses.

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

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

Note If the Finesse server cannot accurately calculate the state time or the call time (such as under certain failover conditions), the timer displays in the format "- -:- -"

For chat contacts, a timer appears in the Manage Chat and Email gadget that indicates the duration of the chat session. For email contacts, a timestamp appears in the Manage Chat and Email gadget that indicates the time that the system received the email contact.

Finesse Desktop Behavior

If the Finesse desktop is not the active window and one of the following event occurs, the Finesse desktop either becomes the active window or flashes in the taskbar:

  • You receive an incoming call on the desktop

  • You are signed out due to failover or inactivity

• Your Supervisor signs you out

The Finesse desktop behavior varies based on the browser and the number of tabs opened.

Toaster Notification

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

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

Toaster notification fade out time for chat can be configured through **Subsystems** > **Chat and Email** > **Channel Parameters** > **No Answer Timeout** submenu option from the Unified CCX Administration menu bar.

Note Internet Explorer does not support toaster notification.

Finesse Desktop Failover

In a contact center deployment, Cisco Finesse is installed on two nodes. If the Finesse server that you are currently signed in goes out of service, a banner appears at the top of the desktop notifying that the desktop has lost connection to the server.

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

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

When the desktop fails over or reconnects, if the last state you selected prior to the failover was Ready, Finesse attempts to preserve that state. When Finesse recovers, the desktop attempts to send a request to put you back in Ready state.

Note When the desktop tries to connect to the alternate server, you may see the following pop-up message:

Following certificates should be accepted before using Cisco Finesse Desktop.....

If you are unable to accept the security certificates and see a request to accept the certificates again, close the pop-up and continue to sign in.

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

- If you are in Wrap-Up state when the desktop recovers, Finesse does not send a request because that would automatically end your wrap-up session. After the wrap-up timer expires, your state is determined by Unified Communications Manager and may depend on the type of failover that occurred.

- If your state was changed to Not Ready (either by your supervisor or by the system (for example, Ring No Answer), your selection of Ready is not preserved.

- Unsolicited state changes are not taken into account. For example, if a supervisor changes your state to Ready (you did not select Ready), your Ready state may not be preserved. If your last selection was Ready and the system attempts to change your state to Ready (such as for Ring No Answer), your selection of Ready is preserved.

One Finesse Desktop or Finesse IPPA Session Per Agent

Finesse has the following agent session behavior:

- Finesse does not support agents simultaneously sign in to Finesse desktop and Finesse IPPA. Agents must sign in to Finesse desktop or Finesse IPPA.

- Finesse can support a mix of agents where some agents use Finesse IPPA and other agents use Finesse desktop (license permitting).

- When agents are signed in to the Finesse desktop or Finesse IPPA, they can also simultaneously sign in to a third-party application using the Finesse API. (This setup is considered a custom development. Similar to other Finesse customizations, the customer or partner is responsible for proper development and testing of this custom setup.)

Accessibility

The Finesse desktop supports features that improve accessibility for low-vision and vision-impaired users. The following table shows how to navigate the Finesse desktop using the accessibility features.

Desktop Element	To Perform the Following Actions	Use the Following Keys
Address Bar	Move between the address bar and the frames (in Internet Explorer only)	F6
Sign-in Page		

Desktop Element	To Perform the Following Actions	Use the Following Keys
Language Selector Drop-Down	Access the drop-down	Tab and Shift-Tab from the ID field
	Open the drop-down	Alt-Down Arrow or Enter
	Scroll the drop-down	Up and Down Arrows
	Select a language	Enter
	Hide the drop-down	Esc
Mobile Agent Help Tooltips	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
Certificate Acceptance	Toggle between the certificate links	Tab and Shift-Tab
	Open the certificate link to accept the certifiate	Enter
Call Control Gadget		
Incoming Call Popover	Accept the incoming call	Enter
Call Control Gadget Navigation	Access the call control gadget, phone book, and keypad	Tab and Shift-Tab
	Open and close the call control gadget	Enter
Phone Book	Navigate the phone book contact entries	Arrow keys
	Select the contact to make a call	Enter
	Select the contact to copy the number to the dialler	Enter
Dialpad	Toggle between the phone book and the keypad	Tab, Shift - Tab, and Enter
	Navigate the keypad number buttons	Arrow keys, Tab, and Shift - Tab
	Make a new call, Transfer a call, or consult a call	Press Enter in the number display field OR Navigate to the Call button and press Enter

Desktop Element	To Perform the Following Actions	Use the Following Keys
Wrap-Up Reason Drop-Down	Access the drop-down	Tab and Shift-Tab
	Open the drop-down	Enter
	Scroll the list of wrap-up reasons	Up and Down Arrows
	Select a wrap-up reason	Space Bar
	Apply the wrap-up reasons	Enter
	Close the drop-down	Esc
Callback and Reclassify Dialog Boxes (Outbound Calls)	Access the Callback and Reclassify buttons	Tab and Shift-Tab
	Open the Callback and Reclassify dialog boxes	Enter (on the respective buttons)
	Close dialog boxes	Press Esc OR Navigate away from the dialog boxes using Tab or Shift-Tab
Reclassify Dialog Box	Navigate the elements	Tab, Shift-Tab, Up and Down Arrows
	Select an option	Enter
	Close the Reclassify dialog box	Esc
Callback Date and Time Calendar	Navigate to and from the Calendar	Tab and Shift-Tab
	Navigate within the Calendar	Arrows
	Select a Calendar date	Enter
	Move to the first or last days of a month	Home and End
	Close the pop-up	Esc
Callback Date and Time Controls	Navigate the elements	Tab and Shift-Tab
	Increase and decrease the Hour and Minute values	Up and Down Arrows
	Toggle the AM/PM button	Enter
	Close the pop-up	Esc
Desktop Chat		

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

Desktop Element	To Perform the Following Actions	Use the Following Keys
Chat Window	Toggle between chat tabs	Tab and Shift-Tab
	Select chat tab	Enter
	Close chat tab	Enter
	Close chat window	Enter
	Resize chat window	Enter
	Minimize or restore chat window	Enter
	Team Message	
Team Message	Navigate the elements	Tab, Shift-Tab, Up and Down arrows
	Select an option	Enter
	Close the dialog box	Esc
	Show recent messages	Shift-Tab
	Back and Delete	Tab-Enter
Queue Statistics Gadget		
Queue Statistics Gadget	Access the Queue Statistics Gadget	Tab and Shift-Tab
	Navigate the Queue Statistics table header	Tab and Shift-Tab
	Navigate the Queue Statistics table cells	Tab and Shift-Tab
Desktop		
Send Error Report	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
	To send the error report	Enter
Sign out	To sign out of the Finesse desktop	Enter
Third-Party Gadget		
Maximize Icon	Access the maximize icon	Tab and Shift-Tab
	Maximize and restore a third-party gadget	Enter
Digital Channels		

Desktop Element	To Perform the Following Actions	Use the Following Keys
Agent State	Access the digital channel agent state gadget	Tab and Shift-Tab
	Open and close the gadget options drop-down.	Enter
	Close the gadget options drop-down.	Esc
	Navigating options in drop-down.	Up and Down Arrows
	Select an option in drop-down.	Enter

Screen Reader Support

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

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

Page or gadget	Element	Notes
Call Control Gadget	Phone Book	The screen reader reads the contents of the phone book. **Note** • The screen reader is not able to read the summary of this table by using CTRL+INSERT+T. As a workaround, use the heading key instead. • The phone book does not support use of CTRL+ALT+RIGHT/LEFT/UP/DOWN arrow keys to move between cells in the table. • The screen reader does not read the heading of each column in IE11.
	Keypad	The screen reader reads the number of the keypad and the letters that go with it (ABC, DEF, and so on). **Note** • In the table summary, if you select the table, the screen reader reads the summary of the table, which is Keypad. • If you press Enter on a Keypad button with JAWS enabled, the digits are not entered or displayed in the edit box on top of the Keypad. • If you use Ctrl+Alt+Right, Left, Up, and Down arrow keys to move between the cells, extra buttons are read on the Keypad.
	Call row errors	The screen reader reads the call row error messages.
Agent Desktop	Headings	The screen reader reads all the headings on the Agent Desktop (HTML elements <h1> to <h6]>).
	Failover Banner	During failover, the screen reader reads the statement from the red banner. When the Failover is complete, the screen reader reads the statement from the green banner.
	State Change text	Whenever the agent state changes, the screen reader reads the new state.
Desktop	Send clients logs help icon	The screen reader reads descriptive text for the help icon.