



Cisco Finesse Agent and Supervisor Desktop User Guide for Cisco Unified Contact Center Express, Release 12.5(1)SU1

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Change History

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

Change	See	Date
Added information about the availability of case-insensitive login IDs	Common Tasks > Sign In to Finesse Desktop	October 2021
Initial Release of Document for Release 12.5(1) SU1		

Change	See	Date
Added Multi-Tab Gadgets feature details	Cisco Finesse Desktop Interface > Finesse Desktop Behaviour > Multi-Tab Gadgets Cisco Finesse Desktop Interface > Accessibility > Access Keyboard Shortcuts > Agent Keyboard Shortcuts	January 2021
Added custom logon details	Common Tasks > Sign In to Cisco Finesse Desktop	
The procedure to accept certificates in Chrome has been updated with Edge Chromium (Microsoft Edge)	Common Tasks > Accept Security Certificates Common Tasks > Accept Certificates for Multi-session Chat and Email Common Tasks > Desktop Chat > Sign In to Desktop Chat	
Added Agent Device Selection feature details	Common > Select Active Device	

About This Guide

The *Cisco Finesse Agent and Supervisor Desktop User Guide for Cisco Unified Contact Center Express* describes how agents and supervisors can use the Finesse desktop for calls and chat.

Audience

This document is intended for Unified Contact Center Express agents and supervisors who use the Finesse desktop.

Conventions

This manual uses the following conventions.

Convention	Description
boldface font	Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example: <ul style="list-style-type: none"> Choose Edit > Find Click Finish.

Convention	Description
<i>italic font</i>	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> • To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills. • For emphasis. Example: <i>Do not</i> use the numerical naming convention. • An argument for which you must supply values. Example: IF (<i>condition, true-value, false-value</i>) • A book title. Example: See the <i>Cisco Unified Contact Center Express Installation Guide</i>.
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> • Text as it appears in code or information that the system displays. Example: <code><html><title> Cisco Systems, Inc. </title></html></code> • File names. Example: <code>tserver.properties.</code> • Directory paths. Example: <code>C:\Program Files\Adobe</code>
string	Nonquoted sets of characters (strings) appear in regular font. Do not use quotation marks around a string or the string will include the quotation marks.
[]	Optional elements appear in square brackets.
{ x y z }	Alternative keywords are grouped in braces and separated by vertical bars.
[x y z]	Optional alternative keywords are grouped in brackets and separated by vertical bars.
< >	<p>Angle brackets are used to indicate the following:</p> <ul style="list-style-type: none"> • For arguments where the context does not allow italic, such as ASCII output. • A character string that the user enters but that does not appear on the window such as a password.

Convention	Description
^	The key labeled Control is represented in screen displays by the symbol ^. For example, the screen instruction to hold down the Control key while you press the D key appears as ^D.

Related Documents

Document or Resource	Link
Cisco Unified Contact Center Express Documentation Guide	https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products_documentation_roadmaps_list.html
Cisco Unified CCX documentation	https://www.cisco.com/en/US/products/sw/custcosw/ps1846/tsd_products_support_series_home.html
Cisco Unified Intelligence Center documentation	https://www.cisco.com/en/US/products/ps9755/tsd_products_support_series_home.html
Cisco Finesse documentation	https://www.cisco.com/en/US/products/ps11324/tsd_products_support_series_home.html
Cisco Customer Collaboration Platform documentation Note From Unified CCX Release 12.5(1), CCP documents are available in the Cisco Unified CCX documentation folder.	https://www.cisco.com/en/US/products/sw/custcosw/ps1846/tsd_products_support_series_home.html
Cisco Unified CCX Virtualization Information	https://www.cisco.com/c/dam/en/us/td/docs/voice_ip_comm/uc_system/virtualization/virtualization-cisco-unified-contact-center-express.html
Cisco Unified CCX Compatibility Information	https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-device-support-tables-list.html

Documentation and Support

To download documentation, submit a service request, and find additional information, see *What's New in Cisco Product Documentation* at <https://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>.

Documentation Feedback

To provide your feedback for this document, send an email to:

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CHAPTER 1

Cisco Finesse Desktop Interface

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

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- [State and Call Timers, on page 4](#)
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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

**Note**

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

For more information on the supported devices, see *Unified CCX Software Compatibility Matrix* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-device-support-tables-list.html>.

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 up to 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 the contacts that are listed in your phonebook.
- Workflows: Your administrator can define workflows that are triggered by call and digital channels events (for example, your administrator may create a workflow that causes a browser pop on your desktop when a call arrives).
- 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 respective supervisors and take necessary action.
- **Agent Device Selection:** Agents can select the telephony device when logging into Cisco Finesse desktop.

The functionality available to you depends on what your administrator has configured. For example, if your administrator 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 respective supervisors and take necessary action. This is a one-way communication from supervisors to their teams.

State and Call Timers

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

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

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 Cisco Finesse desktop is not the active window and one of the following events 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 Cisco 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 Cisco 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 notifications 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.

Browser Settings for Chrome

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

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

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

Multi-Tab Gadgets

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

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

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

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

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

Figure 1: Multi-Tab Gadgets

Customer Profile: Michael Littlefoot

Customer Status : Gold
 Phone Number : +1-408-555-1212
 Email Address : michael.littlefoot@email.com
 Address : 3772 Sierra Road, Long Long Address, San Jose, CA 95140
 Account Number : 123456789

Issue : Billing issue
 Membership Number : 123456789
 Data Card Number : 123456789000123
 Alternate Contact Number : 000 987654321
 Other : More detailed issue info

Agent CSQ Statistics Report | Agent Team Summary Report | Customer Experience Journey

CSQ Name	Calls Waiting	Longest Call in Queue
CX_Base	1	00:00:50
Sales Queue_1	2	00:01:00
Marketing Queue_1	1	00:00:50
Service Queue_1	2	00:03:00
Sales Queue_1	1	00:00:50
Service Queue_2	2	00:02:00
Marketing Queue_2	1	00:00:50
Technical Support Queue_1	2	00:01:30
Technical Support Queue_1	2	00:04:00
Service Queue_2	2	00:02:00
Marketing Queue_2	1	00:00:50

Ordering of Multi-Tab Gadget Tabs

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

Multi-Tab Behavior When Switching Between Desktop Container Tabs

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

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

Figure 2: History

Customer Information:

- Name: Michael Littlefoot | 00:05 | +14085551212
- Customer Status: Gold
- Phone Number: +1-408-555-1212
- Email Address: michael.littlefoot@email.com
- Address: 3772 Sierra Road, Long Long Address, San Jose, CA 95140
- Account Number: 123456789
- Issue: Billing issue
- Membership Number: 123456789
- Data Card Number: 123456789000123
- Alternate Contact Number: 000 987654321
- Other: More detailed issue info

Recent Call History

Start Time	Duration	Type	Number	Disposition	Queue	Wrap-Up Reason
May 04 2017 9:43:53 AM	00:00:00	Inbound	+13780049003	Answered	Warranty	Onb_End12
May 04 2017 9:43:00 AM	13:09:12	Inbound	97224453990	Transferred	Servicing	SalesPromo
May 04 2017 9:41:05 AM	00:00:03	Outbound	Unknown	Failed	New Subscription	SalesPromo
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-
May 04 2017 9:36:00 AM	00:00:03	Outbound	1001075	Abandoned	-	-
May 04 2017 9:43:00 AM	13:09:12	Inbound	97224453990	Transferred	Servicing	SalesPromo
May 04 2017 9:41:05 AM	00:00:03	Outbound	Unknown	Failed	New Subscription	SalesPromo
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-
May 04 2017 9:36:00 AM	00:00:03	Outbound	1001075	Abandoned	-	-
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-
May 04 2017 9:36:00 AM	00:00:03	Outbound	1001075	Abandoned	-	-
May 04 2017 9:38:00 AM	00:00:15	Outbound	1001012	Unanswered	-	-

Reset Tab Order

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

Dynamic Height

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

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

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



Note

Dynamic height functionality is unavailable or disabled in the following scenarios:

- When the drag-and-drop feature is enabled.
- When maximized view is selected, where the gadget stays maximized when switching between tabs.
- When the gadget is collapsed and gadget contents are not being shown.

Drag and Drop

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

Order button. This order is lost when agents and supervisors switches to a different browser or when the browser cache is cleared.

Drop Down

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

Maximize and Collapse

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



Note

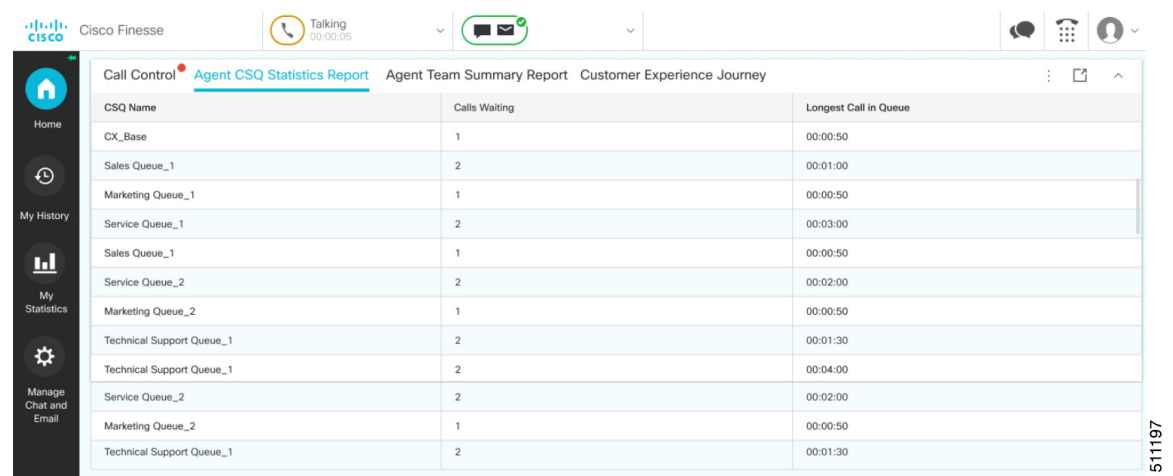
Maximize and Collapse features are unavailable in the Multi-Tab gadget when the desktop drag-and-drop feature is enabled (For more information about enabling the drag-and-drop feature, see the *Drag-and-Drop and Resize Gadget or Component* section in the *Cisco Unified Contact Center Express Administration and Operations Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-maintenance-guides-list.html>).

Multi-Tab Gadget Notifications

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

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

Figure 3: Notification





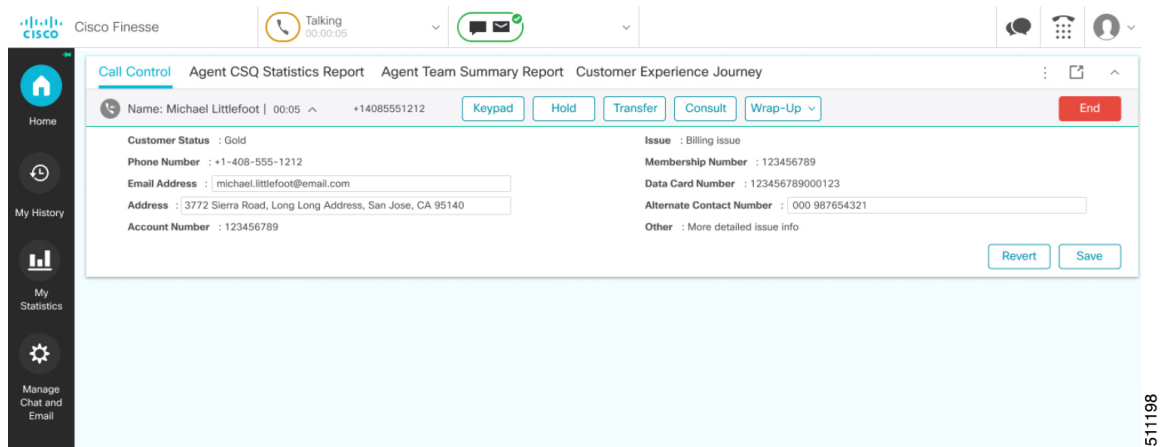
Note Notification functionality is unavailable for screen readers.

Call Control Gadget in Multi-Tab

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

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

Figure 4: Call Control Gadget in Multi-Tab



Call Control Notifications in Multi-Tab Gadgets

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

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

Third-Party Gadget Notifications in Multi-Tab Gadgets

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

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

Accessibility

Multi-Tab gadget tabs can be switched using keyboard shortcuts. For more information see [Agent Keyboard Shortcuts](#), on page 18.

Finesse Desktop Failover

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

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

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

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



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

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

If you are unable to accept the security certificates, and keep seeing the message to accept the certificates, close the pop-up and continue to sign in.



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

- If you are in Wrap-Up state when the desktop recovers, Cisco Finesse does not send a request because that would automatically end your wrap-up session. After the wrap-up timer expires, your state is determined by Unified CCX 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.



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

Table 1: Web Accessibility

Desktop Element	To Perform the Following Actions	Use the Following Keys
Address Bar	Move between the address bar and the frames (in Internet Explorer only)	F6
Sign-in Page		
Language Selector Drop-Down	Access the drop-down	Tab and Shift-Tab from the ID field
	Open the drop-down	Alt-Down Arrow or Enter
	Scroll the drop-down	Up and Down Arrows
	Select a language	Enter
	Hide the drop-down	Esc
Mobile Agent Help Tooltips	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
Certificate Acceptance	Toggle between the certificate links	Tab and Shift-Tab
	Open the certificate link to accept the certificate	Enter
Call Control Gadget		
Incoming Call Popover	Accept the incoming call	Enter
Call Control Gadget Navigation	Access the call control gadget, phone book, and keypad	Tab and Shift-Tab
	Open and close the call control gadget	Enter

Desktop Element	To Perform the Following Actions	Use the Following Keys
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
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

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

Desktop Element	To Perform the Following Actions	Use the Following Keys
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
Team Message		
Team Message	Navigate the elements	Tab, Shift-Tab, Up and Down arrows
	Select an option	Enter
	Close the dialog box	Esc
	Show recent messages	Shift-Tab
	Back and Delete	Tab-Enter
Queue Statistics Gadget		
Queue Statistics Gadget	Access the Queue Statistics Gadget	Tab and Shift-Tab
	Navigate the Queue Statistics table header	Tab and Shift-Tab
	Navigate the Queue Statistics table cells	Tab and Shift-Tab
Desktop		
Send Error Report	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
	To send the error report	Enter
Sign out	To sign out of the Finesse desktop	Enter
Third-Party Gadget		

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

Screen Reader Support

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

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

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

Page or gadget	Element	Notes
Call Control Gadget	Phone Book	<p>The screen reader reads the contents of the phone book.</p> <p>Note</p> <ul style="list-style-type: none"> • The screen reader is not able to read the summary of this table by using CTRL+INSERT+T. As a workaround, use the heading key instead. • The phone book does not support use of CTRL+ALT+RIGHT/LEFT/UP/DOWN arrow keys to move between cells in the table. • The screen reader does not read the heading of each column in Internet Explorer 11.
	Keypad	<p>The screen reader reads the number of the keypad and the letters that go with it (ABC, DEF, and so on).</p> <p>Note</p> <ul style="list-style-type: none"> • 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.

Access Keyboard Shortcuts

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



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

Procedure

Press **Ctrl + Alt + F**.

or

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

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

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

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

Agent Keyboard Shortcuts

The following table lists the agent-specific keyboard shortcuts.

Table 2: Agent Keyboard Shortcuts List (Windows)

Group	Action	Shortcut Key	Notes
Agent State	Ready for Call	Ctrl + Alt + R	-
	Not Ready for Call	Ctrl + Alt + N	Displays the reason codes drop-down when there are multiple Not Ready reason codes listed.
	Open Digital Channel State Control	Ctrl + Shift + L	-
	Ready for All Digital Channels	Ctrl + Shift + V	-
	Not Ready for All Digital Channels	Ctrl + Shift + Z	-

Group	Action	Shortcut Key	Notes
Application	Switch between Popover	Ctrl + Alt + P	Toggles between the popovers when there are multiple popover notifications.
	Maximize/Restore view	Ctrl + Shift + 0	-

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

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

**Note**

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

Email and Chat Keyboard Shortcuts

The following table lists the keyboard shortcuts that can be used in active Email and Chat gadgets.

Table 3: Keyboard Shortcut List (Windows)

Group	Action	Shortcut Key	Notes
Manage Chat and Email	Reply	Alt+Shift+r	Reply to an email.
	Reply All	Alt+Shift+b	Reply to all recipients of an email.
	Forward	Alt+Shift+g	Forward an email.
	Insert Image	Alt+i	Insert an image in an email. The cursor must be in Reply, Reply All, or Forward pane.
	Attach a file	Alt+m	Attach a file to an email. The cursor must be in Reply, Reply All, or Forward pane.
	Insert Predefined Response	Alt+p	Insert a predefined response to an email. The cursor must be in Reply, Reply All, or Forward pane.
	Insert Hyperlink	Alt+l	Insert a hyperlink in an email. The cursor must be in Reply, Reply All, or Forward pane.
	Exit out of the Email Editor Pane	Esc	Close open dialog box, pop-up, tool tip, and drop-down.
	Discard	Alt+Shift+y	Close an email without saving any changes.
	Wrap-up	Alt+Shift+w	Initiate wrap-up for an email.
	Requeue	Alt+Shift+q	List CSQs with a search option.
	Send	Alt+Shift+s	Send the selected email.
	Insert Predefined Response	Alt+p	List predefined responses that are specific to the role (Agent or Supervisor).
	Wrap-up	Alt+Shift+w	Initiate wrap-up for a chat.
	Invite Agent	Ctrl+Alt+i	Invite an agent or a supervisor for an ongoing chat.
	End	Ctrl+Shift+6	End the active chat.
	Leave	Ctrl+Shift+7	Exit from the active group chat.



Note

If you are using Mac keyboard, press **option** instead of **Alt**. For example, to reply to an email press **option+shift+R**.

Supervisor Keyboard Shortcuts

When you sign in as a supervisor, the **Keyboard Shortcuts List** dialog box lists both the agent and supervisor-specific keyboard shortcuts. For more information on agent-specific keyboard shortcuts, see [Agent Keyboard Shortcuts, on page 18](#).

The following table lists the supervisor-specific keyboard shortcuts.

Table 4: Supervisor Keyboard Shortcuts List (Windows)

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

**Note**

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



CHAPTER 2

Common Tasks

- [Browser Settings for Internet Explorer, on page 25](#)
- [Browser Settings for Firefox, on page 26](#)
- [Browser Settings for Chrome, on page 26](#)
- [Change Your State, on page 27](#)
- [Sign In to Cisco Finesse Desktop, on page 28](#)
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Browser Settings for Internet Explorer

To ensure all features of Finesse work properly on the Internet Explorer, you must:

1. Disable pop-up blockers.
2. Configure the following privacy and advanced settings:
 - a. From the browser menu, select **Tools > Internet Options**.
 - b. In the **Privacy** tab, click **Sites**.
 - c. In the Address of website box, enter the domain name for the Side A Finesse server.
 - d. Click **Allow**.
 - e. In the Address of website box, enter the domain name for the Side B Finesse server.
 - f. Click **Allow > OK**.
3. Enable the following security settings to allow users to sign in:
 - Run ActiveX controls and plug-ins

- Script ActiveX controls marked as safe for scripting
- Active scripting

To enable these settings:

- From the Internet Explorer browser menu, click **Tools > Internet Options**.
- In the **Security** tab, click **Custom level**.
- Under ActiveX controls and plug-ins, select **Enable** for **Run ActiveX controls and plug-ins** and **Script ActiveX controls marked safe for scripting**.
- Under Scripting, select **Enable** for **Active Scripting**.



Note

If you are using self-signed or CA-signed certificates and the server's FQDN, there should not be any certificate errors or warnings when connecting to Cisco Finesse over HTTPS.

Browser Settings for Firefox

Complete the following steps to ensure Finesse responds as expected when it is not the active window:

Procedure

- Step 1** Open Firefox and enter **about:config** in the address bar.
- Step 2** On the warranty page, click **I accept the risk!**.
- Step 3** In the **Search** field, enter `dom.disable_window_flip`.
- Step 4** Double-click **dom.disable_window_flip** to set the value to *false*.
- Step 5** Restart Firefox.

Browser Settings for Chrome

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

Procedure

- Step 1** Open Chrome and enter **chrome://flags/#automatic-tab-discarding** in the address bar.
- Step 2** Press **Enter**.
- Step 3** Select **Disabled** from the drop-down list.

Step 4 Click **Relaunch Now**.

Change Your State

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

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

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

Change Your State for Voice Channels

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

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

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

Procedure

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

Step 2 Select the appropriate state from the list.

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

Change Your State for Digital Channels

When you sign in to the Finesse desktop, your state is set to **Not Ready** by default.

If you are in Ready state, you can set your state to Not Ready.

To accept incoming chat and email contacts, you must set your state to Ready.

Procedure

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

Step 2 Select the appropriate state from the list.

Sign In to Cisco Finesse Desktop

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



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

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



Note Custom logon message is not displayed for SSO users.



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



Note Extension Mobility brings a user-specific phone profile (including configured extensions for that user) to the phone being logged in from. After logging in to Cisco Unified Communications Manager with Extension Mobility, agents can log in to Unified CCX using Finesse.

If you log in to any other Extension Mobility device when you are still logged in to one Extension Mobility device and Finesse Desktop, you are automatically logged off from the first Extension Mobility device. However, you have to log out and log in again to Finesse Desktop.

Procedure

Step 1 Sign in to the administration console on the primary UCCX server using the URL: `https://FQDN of Unified CCX server: 8445/desktop`, where FQDN is the fully qualified domain name of your primary server.

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

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

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

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

Note

- User IDs are case-sensitive and can contain numbers (0-9), hyphens (-), underscores (_), and periods (.). User IDs are assigned to you by your administrator and cannot begin or end with a period or contain two periods in a row.

To make user IDs case-insensitive, you must install 12.5(1) SU1 ES02.

- Cisco Finesse agent usernames are restricted to 7-bit printable ASCII characters (any of the 94 characters with the numeric values from 33 to 126). The supported characters are: **A-Z and 0-9**,,,-,!, ~, `,\$, ^,&,(,),",',[,],@,.. The following characters are not supported: /, \, [,],:,:;,|, =,,+, *,?, <, >.

- The Username (desktop Sign In page) in Unified CCX deployment refers to the AgentID.

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

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

Step 6 Click **Sign In**.

Note

- The **Sign In** button is enabled once the username, password, and extension fields are entered. If any field is incomplete, the **Sign In** button remains disabled.

- For non-SSO users, a dialog with the message appears when you (agent, supervisor, administrator) click the **Sign In** button.

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

- If your administrator has enabled the device selection feature for you, the devices associated to your extension are displayed in **Select Your Preferred Device** screen. For more information see [Agent Device Selection, on page 29](#). Even if an agent has signed into only one device, this screen is displayed. Therefore, this screen offers a chance to determine if an agent has missed logging into the selected device and thereby retrying the login.

- To change the language that appears on your desktop, use the **Change the Language** link. On the language selector screen, choose the language.

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

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

Agent Device Selection

When you (agents and supervisors) need to use different devices that are configured with the same extension, the administrator must enable the Agent Device Selection feature for you. You can select one of the endpoints (Desk Phone with Extension Mobility, Desk Phone without Extension Mobility, Jabber, and so on) on the

shared Automatic Call Distribution (ACD) lines as your active device while signing in to the Finesse desktop. This informs the solution to ignore the other devices and use the indicated device as the only source for call interaction. This allows effective control of the call irrespective of from where you connect to the system. You can switch the active device based on where you are working—across shifts, moving from one office to another across various locations, or working from home.

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



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

Procedure

Step 1 Sign in to the Finesse desktop.
If your administrator has enabled the Agent Device Selection feature, the devices sharing your extension are displayed in **Select Your Preferred Device** screen.

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

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

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

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

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

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

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

- When you sign in, the browser saves the device that is selected for that agent and the extension used. On subsequent sign-in of the same agent with the same extension, on the same machine, through the same browser, that device will be displayed as the first in the preferred device selection screen.

Step 3 Click **Continue**.

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

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

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

Sign In to Cisco Finesse Desktop Single Sign-On Mode

Cisco Finesse supports custom security banner message for Finesse desktop users. If your administrator has defined the security banner message, then it is displayed in the desktop **Sign In** page.

Procedure

Step 1 If your contact center has installed a language pack for Cisco Finesse, on first sign-in, a **Language Selector** screen appears on the desktop. From the language selector drop-down, choose the language that you want to appear on the desktop. Click **Next**.

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

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

Step 2 On the IdP page, enter your operating system **Username** and **Password**, and click **Sign in**.

Step 3 In the **Extension** field, enter your extension and click **Submit**.

- Note**
- If your administrator has enabled the device selection feature for you, the devices associated to your extension are displayed in **Select Your Preferred Device** screen. For more information see [Agent Device Selection, on page 29](#). Even if an agent has signed into only one device, this screen is displayed. Therefore, this screen offers a chance to determine if an agent has missed logging into the selected device and thereby retrying the login.
 - If sign in fails due to device errors the desktop attempts to automatically sign in again. An alert is displayed detailing the number of remaining retries and the time left for the next retry attempt.
 - To change the language that appears on your desktop, use the **Change the Language** link. On the language selector screen, choose the language.

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

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

Account Locked After Five Failed Sign In Attempts

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

This restriction applies to all the sign in methods.

Accept Security Certificates

Ensure that the pop-ups are enabled for the Finesse desktop.

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

Install certificates on Windows operating system:

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

Internet Explorer



Note

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

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

1. A page appears that states there is a problem with the website's security certificate. Click **Continue to this website (not recommended)** link to open the Finesse sign in page. The Finesse sign in screen appears with a certificate error in the address bar.
2. Click on the certificate error that appears in the address bar and then click **View Certificates**.
3. In the **Certificate** dialog box, click **Install Certificate** to open the **Certificate Import Wizard**.
4. Select **Current User** to install the certificate for the current user only, or select **Local Machine** to install the certificate for all Windows users.
5. On the **Certificate Import Wizard**, click **Next**.

6. Select **Place all certificates in the following store** and click **Browse**.
7. Select **Trusted Root Certification Authorities** and click **OK**.
8. Click **Next** and then click **Finish**. A **Security Warning** dialog box appears.
9. Click **Yes** to install the certificate. The **Certificate Import** dialog box appears.
10. Click **OK** and close the **Certificate Import** dialog box.
11. Close the browser tab. The accepted certificate link is removed from the **SSL Certificate Not Accepted** dialog box.

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



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

Firefox

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



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

2. Click **Confirm Security Exception**.
3. On the Finesse sign in page, enter your agent ID or username, password, and extension, and click **Sign In**.
4. In the **SSL Certificate Not Accepted** dialog box, click the certificate link. A browser tab opens for the certificate that you must accept.
5. On the browser tab, click **I Understand the Risks > Add Exception**. Ensure that the **Permanently store this exception** box is checked.
6. Click **Confirm Security Exception**. The browser tab closes after you accept the certificate and the accepted certificate link is removed from the **SSL Certificate Not Accepted** dialog box. Close the browser tab if it does not automatically close.

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

Chrome and Edge Chromium (Microsoft Edge)

1. A page appears that states your connection is not private. To open the Finesse sign in page, In Chrome, click **Advanced > Proceed to <Hostname> (unsafe)**. In Microsoft Edge, click **Advanced > Continue to <Hostname> (unsafe)**.
2. Enter your agent ID or username, password, and extension, and then click **Sign In**.
3. In the **SSL Certificate Not Accepted** dialog box, click the certificate link. A browser tab opens for the certificate that you must accept.

4. On the browser tab,

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

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

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


Note

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

5. Click on the certificate error that appears in the address bar and then,
 - In Chrome, select **Certificate (Invalid)**.
 - In Microsoft Edge, select **Certificate (not valid)**.
 The **Certificate** dialog box appears.
6. In the **Details** tab, click **Copy to File**. The **Certificate Export Wizard** appears.
7. Click **Next**.
8. Keep the default selection **DER encoded binary X.509 (.CER)** and click **Next**.
9. Click **Browse** and select the folder in which you want to save the certificate, enter a recognizable file name and click **Save**.
10. Browse to the folder where you have saved the certificate (.cer file), right-click on the file, and click **Install Certificate**. The **Certificate Import Wizard** appears.
11. Keep the default selection **Current User** and click **Next**.
12. Select **Place all certificates in the following store** and click **Browse**. The **Select Certificate Store** dialog box appears.
13. Select **Trusted Root Certification Authorities** and click **OK**.
14. Click **Next** and then click **Finish**. A **Security Warning** dialog box appears that asks if you want to install the certificate.
15. Click **Yes**. A **Certificate Import** dialog box that states the import was successful appears.

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

Install certificates on macOS:

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

Chrome and Edge Chromium (Microsoft Edge)

1. A warning page appears which states that your connection is not private. To open the Finesse sign in page,
 - In Chrome, click **Advanced** > **Proceed to <Hostname> (unsafe)**.
 - In Microsoft Edge, click **Advanced** > **Continue to <Hostname> (unsafe)**.

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

Firefox

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



Note

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

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

Accept Certificates for Multi-session Chat and Email

Before you can join a chat room or handle email contacts, you may be required to accept certificates in the Manage Chat and Email gadget on the Finesse desktop. When you sign in to Finesse, select Manage Chat and Email gadget from the left pane to check whether you must accept any certificates and ensure that the gadget loads properly.

After you log in to Finesse and click **Manage Chat and Email** a warning page **Click Launch Certificate and accept certificate to use Chat and Email** appears.

Click **Launch Certificate**.

Procedure

Step 1 In Internet Explorer:

- a) A warning page appears that states the site is not secure.
- b) Click **More Information** and then click **Go on to the webpage (Not recommended)** link.
The page that states this site is not secure automatically closes and the multi-session gadget loads.

Step 2 In Firefox:

- a) A warning page appears that states your connection is not private.
- b) Click **Advanced** and then click **Accept the Risk and Continue**.
The page that states this connection is not private automatically closes and the multi-session gadget loads.

Step 3 In Chrome and Edge Chromium (Microsoft Edge):

- a) A warning page appears that states your connection is not private.
- b) In Chrome, click **Advanced** and then click **Proceed to <Hostname> (unsafe)** link.
- c) In Microsoft Edge, click **Advanced** and then click **Continue to <Hostname> (unsafe)** link.
The page that states this connection is not private automatically closes and the multi-session gadget loads.

The Launch Certificate error may appear multiple times. Follow the same procedure to load the multi-session gadget.

Sign Out of the Finesse Desktop



Important

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

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

Procedure

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

Note If you handle chat and email contacts, you must ensure that your status is set to Not Ready in both the Call Control gadget and the Chat and Email Control gadget.

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

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

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

Desktop Chat

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

Desktop Chat requires the Cisco IM and Presence certificates to be trusted. To start the Desktop Chat without experiencing an exception, you must add the certificate to the browser trust store, or configure IM and Presence with CA-signed certificate, or push self-signed certificate through group policies in supported browsers. For more information on accepting certificates, see *Accept Security Certificates*.



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

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

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

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


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



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

Sign In to Desktop Chat

Procedure

- Step 1** In the Finesse desktop, click the Desktop Chat icon ().
- Step 2** Enter your username and password in the appropriate fields and click **Sign In**.
- Step 3** **Note** If you are using self-signed certificates, you get the certificate acceptance window.

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




- To accept the certificates in Internet Explorer, refer to the section *Accept Security Certificates > Step 2 > Substep d* onward.
- To accept the certificates in Firefox, refer to the section *Accept Security Certificates > Step 4* onwards.
- To accept the certificates in Chrome and Edge Chromium, refer to the section *Accept Security Certificates > Step 5* onwards.

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

Add Contact

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

Procedure

- Step 1** To add a contact:
- In the empty contact list, enter the agent name or ID in the **Search** field.
- Note** When you enter the text to search, the Search field pre populates relevant results in a drop-down. From the results list, hover over the required contact and click the  icon.
- In the existing contact list, click the  icon at the end of the group and click **Add**.
 - From the **Recent Chats** group, click the  icon at the end of the required chat and click **Add**.
- Step 2** In the **Add Contact** window, you can choose to change the display name.
- Step 3** From the **Add to Group** drop-down, either choose an existing group or create a new group to add the contact.
- Step 4** Click **Add**.
The contact is added to your existing or newly created group.

Edit Contact

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

Procedure

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

- Step 2** From the drop-down, click **Edit**.
- Step 3** In the **Edit Contact** window, modify the display name or the group.
- While modifying the group for the contact, you can either add the contact to existing groups or create a new group.
- Step 4** Click **Save**.
-

Move Contact

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

Procedure

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

Delete Contact

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

Procedure

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

Edit Group

Use this option to change the group name.

Procedure

-
- Step 1** In the contact list, click the ●●● icon at the end of the required group.
 - Step 2** From the drop-down list, click **Edit**.
 - Step 3** In the **Group** window, modify the group name.
 - Step 4** Click **Save**.
-

Delete Group

Use this option to delete a group.

Procedure

-
- Step 1** In the Contact list, click the ●●● icon at the end of the required group.
 - Step 2** From the drop-down, click **Delete**.
 - Step 3** In the confirmation prompt, click **Delete**.
The group is removed with all the contacts in it.
-

Chat Window

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

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





Note

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

The Desktop Chat window provides the following functionalities:

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

- For each chat tab, the unread chat notification is shown in a badge next to the display name. The badge disappears when that chat tab is active.
- When you hover over the status on any chat tab next to the display name, you get the option to close that chat tab.
- Click the chat window header to minimize or maximize the chat window.
 - When minimized, the chat window header shows the total number of chats that have unread messages.
 - Click **X** on the chat window header and confirm to close all chats.
- Chat history: The Desktop Chat window stores the chat history only for a particular session. If you sign out or the browser is refreshed or closed, the chat history is lost.
- Resize chat window: Click the  button on the chat window header to increase the chat window frame size and the  button to restore the frame size.
- Attachments:



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

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



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

Change Your Desktop Chat State

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

Procedure

-
- Step 1** Click the drop-down arrow beside your current state in the Desktop Chat window.
- Step 2** Choose the appropriate state from the list.
-



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

Sign Out of Desktop Chat

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

Procedure

-
- Step 1** Click the drop-down arrow beside your current state in the Desktop Chat window
- Step 2** From the displayed list, click **Sign Out**.
-

Edit Call Variables

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



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

Procedure

-
- Step 1** In the Finesse desktop, expand the call control gadget to display the call variables.
- Step 2** Click in the text box to edit the values as required.
-

Note In the following scenarios the changes made to the call variable by a user is overwritten:

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

Step 3 Click **Save**.

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

Note The unsaved field values are overwritten during conflict.

Live Data Reports

Access Live Data

Cisco Finesse agent and supervisor desktops provide Live Data gadget.

Live Data gadget displays information about the current state of the contact center. This gadget receives data from the real-time data source at frequent intervals.

This feature provides the following access:

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

To access reports, the administrator must add and configure them in the Cisco Finesse administration console.

In Cisco Finesse agent desktop, click the **My Statistics** tab to access the reports.

In Cisco Finesse supervisor desktop, click the **Team Data** tab and **Queue Data** tab to access the reports.

View Multiple Live Data Report Views

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



Note When you upgrade from an earlier version of Unified CCX 10.x to Unified CCX 11.0 version you can view the multiple live data reports on a single gadget only.

From the Live Data report toolbar, you can also do the following:

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

View My History

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

Recent Call History

On clicking the **My History** tab on the desktop, you can view the following details of your calls since midnight:

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

Recent State History

On clicking the **My History** tab on the desktop, you can view the following details of your call state history since midnight:

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

View Team Message

On logging in to the Finesse desktop, you can view the Team Message banner which broadcasts the active team updates sent by your supervisor in real-time. The total number of active messages sent by your supervisor

is displayed in the banner. By clicking the number, you can view the latest message with the name of the supervisor and the timestamp being displayed against each message.

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

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



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

Drag-and-Drop and Resize Gadget or Component

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

- The drag-and-drop feature allows agents and supervisors to drag (and drop) the gadget or the component to the required position on the desktop layout.
- The resize feature allows the agents and supervisors to shrink or expand the gadget or the component to a custom size on the desktop layout.

The Finesse desktop retains your choices when you access the browser again. For more information on resetting to default layout, see *Reset Layout*.



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

Restrictions and Limitations

Following are the restrictions and limitations for drag and drop or resize feature:

- Rearranging and resizing action that is performed on a gadget or component is specific to the logged in user, the browser used, to the respective tab, and the device used.
- Rearranging and resizing actions are not applicable for header and page-level gadgets and components. For example, Agent State for Voice and Dialer Component.




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

Drag-and-Drop a Gadget or Component

Before you begin

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

Procedure





-
- Step 1** Sign in to the Cisco Finesse desktop.
- Step 2** Place the pointer on the gadget or component title header. When the pointer changes to , click and drag the gadget or component to the required position on the desktop layout.
- The drag-and-drop action that is performed on a gadget or component is specific to the logged in user, the browser used, to the respective tab, and the device used.
- Note** You can arrange a maximum of 12 gadgets or components side by side in a specific tab.
-

Resize a Gadget or Component

Before you begin

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

Procedure

-
- Step 1** Sign in to the Cisco Finesse desktop.
- Step 2** Place the pointer on the gadget or component border. When the pointer changes to , then click and drag the  to resize the gadget or component on the desktop layout.
- The resize action that is performed on a gadget or component is specific to the logged in user, the browser used, to the respective tab, and the device used.
- Note**
-  indicates vertical resizing and  indicates horizontal resizing.
 - The maximum length of the gadget is restricted to the screen length. The minimum length of the gadget is restricted to a 12th of the screen length.
-

Reset Layout

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



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

Procedure

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

Restores the default view across all tabs.



CHAPTER 3

Call-Related Tasks

- [Make a Call, on page 49](#)
- [Answer a Call, on page 50](#)
- [Answer a Direct Preview Outbound Call, on page 50](#)
- [Reclassify a Direct Preview Outbound Call, on page 51](#)
- [Schedule a Callback, on page 51](#)
- [Initiate a Consult Call, on page 52](#)
- [Send DTMF, on page 53](#)
- [Apply Wrap-Up Reason, on page 53](#)
- [Force Wrap-Up, on page 55](#)
- [Initiate a Direct Transfer Call, on page 55](#)

Make a Call

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



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

Procedure

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

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

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

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

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

Answer a Call

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



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

Procedure

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

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

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

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

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

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

Answer a Direct Preview Outbound Call

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

Procedure

Step 1 Ensure your state is set to Ready. You must be in Ready state to receive a call.

When a Direct Preview Outbound call arrives at the desktop, your state changes to Reserved (Outbound). The Call Control gadget expands to show customer information.

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

If you accept the call, the system places the call to the customer directly from your phone.

If the attempt succeeds, you are connected to the customer. If the attempt fails, Finesse places you in Ready state.

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

Reclassify a Direct Preview Outbound Call

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

Procedure

- Step 1** Answer a Direct Preview Outbound call.
 - Step 2** Listen to the call. If you determine the number called is busy, an answering machine, a fax, or an invalid number, click **Reclassify**.
 - Step 3** Choose the appropriate option from the resulting drop-down list.
The icon on the Reclassify button changes to the icon for the selected option.
 - Step 4** To end the call, click **End**.
-

Schedule a Callback

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

Procedure

- Step 1** While you are on the call, click **Callback**.
The Callback dialog box appears. The Current Time field contains the current time in the customer's time zone (this field is read-only).
- Step 2** If the customer prefers to be called back at a different phone number, enter the new phone number in the Phone Number field.
- Step 3** In the Date and Time fields, enter the date and time to call the customer. Type the date and time in to the respective fields or choose the date and time from the displayed calendar.
You must enter the time in the customer's location (not the time in your location).
You can toggle between AM or PM and click **Enter**.

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

Step 4 Click **Schedule**.

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

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

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

Step 8 Click **Cancel**.

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

Initiate a Consult Call

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

Procedure

Step 1 Click **Consult**.

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

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

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

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

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

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

Option	Description
To transfer the customer to the agent or supervisor you are consulting with	Click Transfer .

Send DTMF

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

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



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

Procedure

Step 1 Click **Keypad**.

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

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

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

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

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

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

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

Apply Wrap-Up Reason

Wrap-up reasons can be applied on all Inbound calls routed to the Contact Center and on all the Contact Center triggered outbound campaign calls only. If your administrator has assigned wrap-up reasons to you, the

Wrap-Up Reason button appears when you are on a call or when you are in Wrap-Up state after a call (if you are configured for Wrap-Up).

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



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

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

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

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



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

Procedure

Step 1 Click **Wrap-Up**.

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

Step 3 Click **Apply**.

A number appears on top of the **Wrap-Up** button indicating the number of wrap-up reasons Finesse successfully applied. You can apply maximum of five wrap-up reasons. The Wrap-Up reasons applied are displayed as a tag just below the search field in the Wrap-Up popover.

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

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

Force Wrap-Up

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

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

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

The wrap-up timer is displayed below the state.

Initiate a Direct Transfer Call

Before you begin

You must be on an active call to initiate a direct transfer of a call.

Procedure

- Step 1** Click **Direct Transfer**.
- The call control area expands to reveal the keypad and a list of contacts.
- Step 2** Choose the contact you want to transfer the call from the list of contacts or enter the number into the keypad.
- Step 3** On the keypad, click **Call**.
- The customer call is transferred directly to another contact and the call ends for you.
-



CHAPTER 4

Chat and Email Related Tasks

- [Chat and Email Control Gadget, on page 57](#)
- [Manage Chat and Email Gadget, on page 59](#)

Chat and Email Control Gadget

The Chat and Email Control gadget provides the following functionality:

- Chat and Email state: The Chat and Email state is different from the Voice state that is displayed below the agent name. The following are the states:
 - Not Ready:
 - You are set to this state by default when you sign in to the Cisco Finesse desktop.
 - If you refresh the browser, all the active chat sessions are cleared, email sessions are requeued, and you are moved to this state.
 - You can move to this state when you are not ready to handle chat and email.
 - Ready: You can move to this state when you are ready to handle chat and email.
 - The agent must be in Not Ready state to Logout from Finesse.
 - When an agent accepts the chat, the state of the agent changes to Reserved.
- Time-to-accept counter: When you receive an incoming chat, the time counter is displayed in the pop-over notification and you must accept the chat within the specified time. If you do not accept the chat within the specified time, your state changes to Not Ready.
- Customer details: When an incoming chat arrives on your desktop, the customer details are displayed.

The buttons in the control area:

- When an incoming chat request arrives, the Accept button, time-to-accept counter, and customer details appear for you to accept the chat.

Accept a Chat

When a customer initiates a chat session from a website, Unified CCX Web Chat:

- Sends incoming chat to an available agent.
- Plays an audio alert (For a, new chat request and new message on an inactive chat).



Note With multiple chat session tabs, the selected chat session tab is considered as active. All other chat session tabs are considered as inactive.

- Displays contact details of the customer.

When a customer initiates a chat from Facebook Messenger, Unified CCX Web Chat:

- Prompts agent to accept chat before the time counter expires.
- Sends incoming chat from Facebook Messenger to an available agent with a distinct icon that differentiates Facebook Messenger chat from a regular chat.
 - Only agents can end Facebook Messenger chats. Customers cannot end chat.
 - Agents cannot see typing indicator from Facebook users. However, Facebook users can see typing indicator from agents.
 - Facebook users see the business entity name in the chat. Agent name is not displayed to Facebook users.
 - Group chat is supported in Facebook Messenger chat, however Facebook users continue to see the business entity name.

You are presented with incoming chats until you reach the maximum active chat sessions that are set by administrator.



Note The maximum length of a chat message from the agent is 1500 Unicode characters.

Procedure

Step 1 Click **Accept** in the incoming chat pop-over notification box within the specified time to accept the chat. The Manage Chat and Email gadget opens, chat session starts, and you are connected to the customer.

Note Repeat Step 1 when you are presented with a new incoming chat.
A new tab opens for the chat session and new chat session becomes the current session.

Step 2 To end the chat session, click **End**.

When an Agent does not accept the chat, state of the digital channels changes to Not Ready. When the chat is timed out, the state automatically changes to Not Ready with a warning badge as **Chat Not Accepted**.

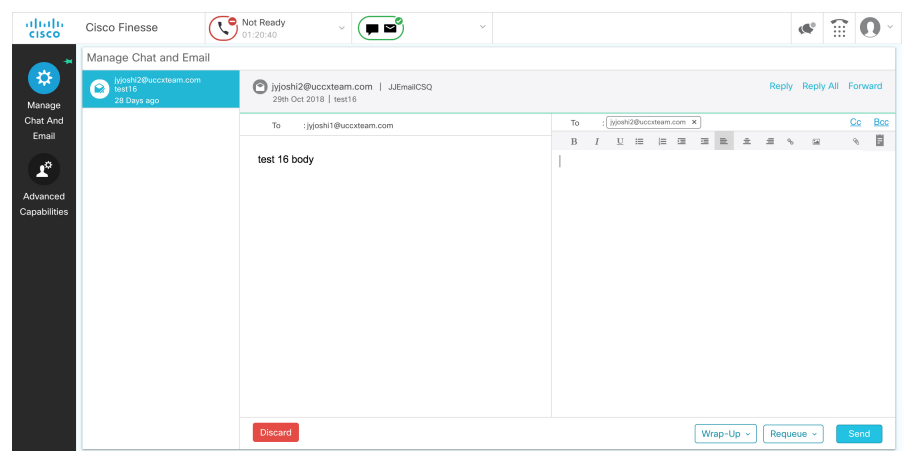
Accept an Email

You must be in Ready state to receive an email contact. When an email contact arrives on your desktop, it is automatically accepted and you would be notified by a pop-over notification.

To view the contact, you must click the **Manage Chat and Email** tab to go to the Manage Chat and Email gadget. If you have more than one contact assigned to you, in the left panel, click the tab for the email contact that you want to view.

Manage Chat and Email Gadget

The following figure shows the Cisco Finesse Manage Chat and Email gadget for agents.



The Manage Chat and Email gadget allows you to manage chat and email contacts. Chat and email contacts that are assigned to you appear in tabs on the left. You can click each individual tab to view and reply to the contact.

Chat contacts are denoted by a chat icon. The following information appears on each chat contact tab:

- Customer name
- Total chat time: Indicates the duration of the chat session.
- New message indicator: If you receive a message on a chat contact that is not your current contact, the tab flashes for a few seconds. A number appears on the tab that indicates how many messages the customer sent since you last replied.

Email contacts are denoted by an envelope icon. When you begin typing a reply to the email contact, a pencil icon appears on the envelope icon.

The following information appears on each email contact tab:

- Customer information: Customer email address, customer name (if available).
- Email timestamp: Indicates the time that the system received the email contact.
- Email subject: Hovering the mouse over the email tab, displays the subject of the email in a tool tip.

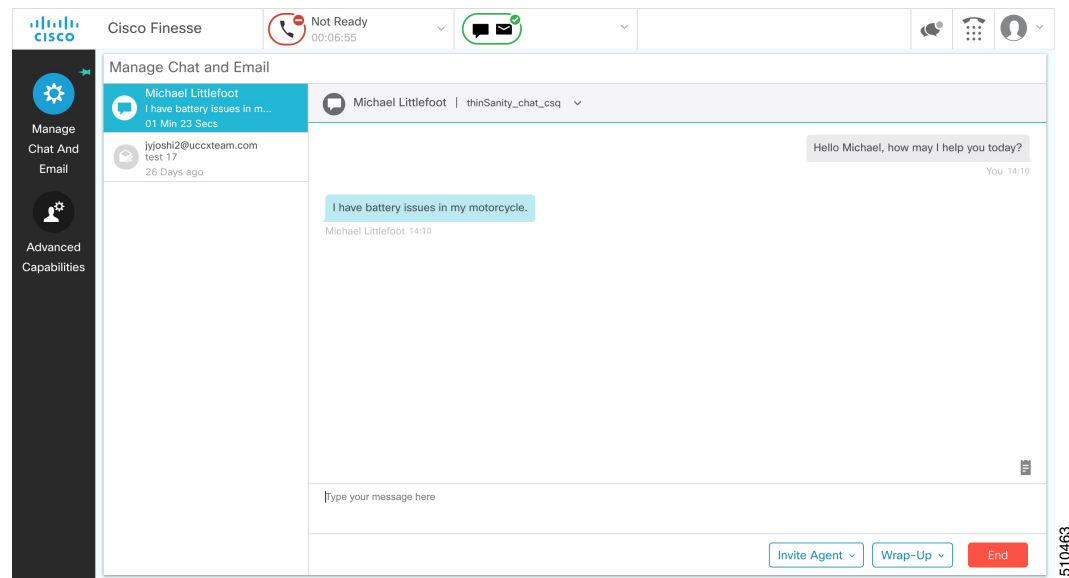
**Note**

When you accept a chat request, Finesse automatically switches to the Manage Chat and Email tab and the chat becomes the active contact. When you are assigned an email contact, Finesse does not switch tabs and the contact does not become the active contact.


Chat Interaction Panel

The following figure shows the Chat Interaction panel of the Manage Chat and Email gadget.

Figure 5: Chat Interaction Panel



The Chat Interaction panel provides the following functionality:

- Typing area: Type your message in the typing area. Right-click to perform basic clipboard operations, and to check spelling.
- The typing awareness indicator shows when the other participant is typing.
- Group Chat icon: Allows you to initiate a group chat with another agent or supervisor.
- Group Chat invite appears for the agent to accept or decline the invite.
- In Group Chat, an agent can click **Leave** to leave the group chat whenever required.
- Predefined responses: Click  to select a predefined response from the list. When you insert a predefined response, it is placed at the position of your cursor.
- End chat session: Click **End** to end a chat session.
- Customer details area: Click the drop-down arrow next to the customer details to minimize or maximize this area.

Initiate a Group Chat

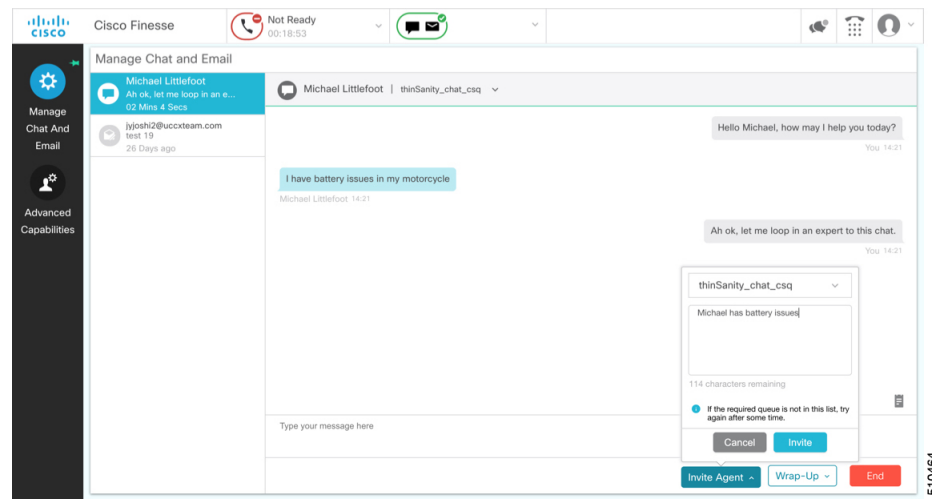
You can initiate a Group Chat when you wish to involve another agent in an ongoing chat session to support the customer. This can be used for seeking further information or support for the ongoing chat. A group chat enables you to:

- Send a chat invite to an available agent of the selected CSQ.

The CSQ names are displayed with the number of available agents in that CSQ.

- Enter the summary of the ongoing chat for the invited agent. This helps the invited agent to understand the context of the ongoing chat.

Figure 6: Initiate Group Chat Invite Interface



Procedure

- Step 1** Click **Invite Agent** icon to initiate a group chat with another agent or supervisor.
- Step 2** **Select a Queue** from the list to invite any available agent to join the chat session.
- Step 3** You may enter a summary of the chat in the **Enter Notes** text box. This helps the invited agent to know the context of the chat. This is optional.

Note The summary notes are visible only when the first agent enters the notes when the chat session was initiated.

The notes entered by the invitee is displayed only to the invited agent.
- Step 4** Click **Invite Agent**.

The available agent gets a notification to **Accept** or **Decline** the chat. When an available agent accepts the group chat, the three participants (the two agents and the customer) may exchange information in the chat window.
- Step 5** To leave the chat session, click **Leave**.

When there is only one agent and the customer in the chat session, the chat can be ended by the Customer or the Agent by clicking **End**.

Accept a Group Chat

You will receive an incoming group chat notification on the Finesse desktop. You may see the notes of the ongoing chat along with the invite. This helps you to understand the issue for which the group chat was initiated by the inviting agent.

Procedure

Step 1 Click **Accept** when you see the new group chat pop-over notification to join the chat session.

The agent can see chat history upto 100 messages after joining the group chat.

Step 2 You may now exchange information with the other two participants (inviting agent and the customer).

- Note**
- The **Invite Agent** icon is disabled till the time there are two agents in the ongoing chat. Only when one agent chooses to leave the chat session, the **Invite Agent** icon will be enabled again. The agent who wishes to leave the chat session may choose to click **Leave**. The agent who is still active in the group chat session can initiate another group chat by following the steps detailed in the **Initiate a Group Chat** section.
 - The maximum number of participants in a Group Chat including the customer is three (3).
 - The notes are not persisted for any subsequent chat sessions with the same customer.
-

Decline a Group Chat

You will receive an incoming group chat notification on the Finesse desktop. You may also see a summary of the ongoing chat along with the invite. This will help you to know the issue for which the group chat was initiated by the inviting agent.

Procedure

Click **Decline** when you see the new group chat pop-over notification to decline the chat invite.

- Note**
- The agent who declined the group chat invite is not offered any successive group chat invites for the same chat session till another agent accepts a group chat invite for the same chat session.
-

Apply Wrapup Reasons for Chat and Email

Wrap-Up Reasons are the logical explanations that you can apply when you wrap up the chats and emails handled by you. If your administrator has assigned Wrap-Up Reasons for you, the Wrap-Up Reasons appear in the drop-down list that can be selected. If there are no Wrap-Up Reasons configured by the administrator, it appears blank.

Wrap-Up Reasons that your administrator modifies is available only to the new contacts and not for the contacts that you are currently handling.

Procedure

Step 1 Click **Wrap-Up**.

In a chat interaction panel you see the **Wrap-Up Reasons(0)** beside the **End** and in a group chat interaction panel beside the **Leave**. In an email reply panel, this is found beside the **Send**. The number in brackets indicates the count of Wrap-Up Reasons selected. This dynamically changes based on your selection.

Step 2 Select the appropriate Wrap-Up Reasons from the drop-down list.**Step 3** Click **OK** to close the Wrap-Up Reasons selection pane.

You can change your selection at any time. Click **Wrap-Up Reasons(0)**; to open the Wrap-Up Reasons selection pane. You can select a maximum number of five (5) Wrap-Up Reasons.

Email Reply Panel

The customer email appears on the left. The area where you type the response appears on the right. After you begin your reply, Finesse automatically saves a draft of your message every 3 minutes.



Note Do not close or reload the browser when you reply to an email or when the email loads on the desktop.

The Email Reply panel provides the following functionality:

Name	Description
Requeue	Requeues an email contact to a new CSQ.
Discard	Discards an email.
Reply	Sends a reply to the email address of the customer.
Reply All	Sends a reply to the customer and to all other email addresses that the customer had included in the original email.
Cc	Allows to include other email addresses to send a copy of the email to them.
Bcc	Allows to include other email addresses to send a blind copy of the email to them.

Name	Description
Forward	Forwards an email to other email addresses.
Bold	Applies bold to the selected text.
Italic	Applies italics to the selected text.
Underline	Underlines the selected text.
Bulleted List	Inserts a bulleted list.
Numbered List	Inserts a numbered list.
Increase Indent	Increases the space between the left margin and the content.
Decrease Indent	Decreases the space between the left margin and the content.
Align Left	Aligns the content to the left margin.
Align Center	Aligns the content to the center.
Align Right	Aligns the content to the right margin.
Add/Edit Link	Creates or modifies a hyperlink of the selected text to the specified URL.
Add Image	Adds a specified image to your reply.
Attach a file	Attaches a specified file to the email reply.
Predefined Response	<p>Inserts the selected predefined response at the end of your reply. You can insert multiple predefined responses. Each time you select a predefined response, it adds to your reply.</p> <p>Note If a Predefined Response is not configured, this button is disabled. If the email is in Plain text format, this button is disabled.</p>
Send	Sends your reply to the customer.

Reply to an Email Contact

Procedure

-
- Step 1** On the Manage Chat and Email gadget, click the email contact that you want to reply to.
- Step 2** Click **Reply/Reply All** to reply to the email address of the customer or to any other email addresses copied by the customer. You may modify or add email addresses in the **To** field. You may also include **Cc** and **Bcc** to include more email addresses by clicking the respective fields.
- The maximum number of recipients allowed per field (**To**, **Cc**, and **Bcc**) is 20.
- Step 3** In the Email Response area, enter your response to the customer.

You can use a predefined response or type your own response.

Note If you select a predefined response, it is inserted at the end of your email.

If **Email Signature** is configured, it gets appended at the end of the email before sending. The Email Signature is not visible to the sender.

Step 4 When you are finished, click **Send**.

Forward an Email

Procedure

Step 1 On the Manage Chat and Email gadget, click the email contact that you want to reply to.

Step 2 Click **Forward** to forward an email to add any other email addresses that you may want to send the email to. You may modify or add email addresses in the **To** field. You may also include **Cc** and **Bcc** to include more email addresses by clicking the respective fields.

Note

- The maximum number of recipients allowed per field (**To**, **Cc**, and **Bcc**) is 20.
- No further attachments can be attached to the outgoing emails.
- The **Reply To** field is modified appropriately such that the recipient of the forwarded email can reply to the original sender of the email directly and not send it back to the Contact Center.
- The **Requeue** is disabled if you have initiated to forward the email. You must cancel **Forward** and click **Reply/Reply All** to requeue the email.

Step 3 In the Email Response area, enter your response.

You can use a predefined response or type your own response.

Note If you select a predefined response, it is inserted at the end of your email.

If **Email Signature** is configured, it gets appended at the end of the email before sending. The Email Signature is not visible to the sender.

Step 4 When you are finished, click **Send**.

Download Customer Attachments

If a customer includes attachments in an email, the attachment filenames appear under the subject of the email. Finesse imposes the following limitations on customer email attachments:

- The total file size limit in an agent's reply is 20 MB.



Note Images within the body of the email are counted as attachments.

- The size limit of a single file attachment is 10 MB.
- The total size limit of attachments in the incoming email from the customer is 20 MB.

Procedure

- Step 1** Click the filename of the attachment you want to open or download.
You are prompted to open or save the file.
- Step 2** Choose whether to open the file or save the file to your computer.
- Step 3** Repeat Step 1 and Step 2 for each attachment that you want to open or download.
-

Insert a Hyperlink to an Email

Procedure

- Step 1** In your email reply, select the text that you want to turn into a hyperlink.
- Step 2** Click the **Insert/Edit Link** icon.
A dialog box opens where you can enter the URL for the link.
- Step 3** In the dialogue box, enter the URL for the link.
- Step 4** Click **Add**.
-

Insert an Image to an Email

Procedure

- Step 1** Place your cursor where you want the image to appear.
- Step 2** Click the **Insert Image** icon.
A dialog box opens where you can enter a URL for the image.
- Step 3** In the dialogue box, enter the URL.
- Step 4** Click **Add**.
The image appears inline in the email response.
You can also copy and paste an image into the email response.
-

Add an Attachment to an Email

You can add up to 10 attachments to an email reply to a customer. The following limitations apply:

- The size of a single attachment must not exceed 10 MB.
- The total size of all attachments must not exceed 20MB.

Procedure

- Step 1** Click the **Attach File** icon.
- Step 2** Navigate to the file that you want to attach to the email.
- Step 3** Click **Open**.
The file appears below the reply panel.
- Step 4** Repeat Step 1 and Step 2 for each file that you want to attach (up to 10).
If you want to remove an attachment, click the **X** to the right of the attachment filename.
-

Requeue an Email Contact

You can requeue an email contact either to the same Contact Service Queue (CSQ) or to any other CSQ. After you initiate the requeue from the agent desktop, the contacts are requeued to a CSQ.

Last-agent email routing is a mechanism to route an email message to the agent who last handled the email conversation. When you requeue an email, the email will be routed to the intended CSQ to be handled by any available agent, and last-agent email routing is not considered.



Note The requeued contact is not requeued to the same agent even if the agent is part of the requeued CSQ and is available to handle more contacts.

When you sign out or refresh your browser, any contacts that you were handling are disassociated from you and requeued to the same CSQ.

Procedure

- Step 1** Select the email that you want to requeue.
- Step 2** Click **Requeue**.
The list of CSQs is displayed with a search option.
- Step 3** Type the CSQ name in the **Search** box to select the desired CSQ from the list.
A confirmation dialog appears.
- Step 4** Click **Yes** to confirm.
-

The email is removed from the chat and email navigation pane and requeued to the selected CSQ.

Discard an Email Message

Procedure

Step 1 On the **Manage Chat and Email** gadget, select the email message that you want to discard.

Step 2 Click **Discard** icon on the Email Reply panel.

You are prompted to discard the selected email message.

Step 3 Click **Yes** to confirm.

The email message is discarded.

When you discard an unsent reply that has attachments, the draft of the reply from the agent and the attachments are deleted. The original email message sent by the email contact remains in the Exchange mailbox.



CHAPTER 5

Supervisor Tasks

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- [View Active Call Details, on page 70](#)
- [View Recent Call History, on page 70](#)
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- [Change the State of an Agent, on page 72](#)
- [Monitor a Call, on page 72](#)
- [Barge In on a Call, on page 73](#)
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- [Send Team Message, on page 74](#)
- [Advanced Capabilities for Supervisor, on page 75](#)

View Team Performance

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

Procedure

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

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

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

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

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

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

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

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

View Active Call Details

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

Procedure

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

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

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

The following call details are displayed:

- The popover call variable header and the call variables configured by the administrator.
 - **Active Participants:** The phone numbers of the active participants in the call.
 - **Held Participants:** The phone numbers of the held participants in the call. The Held Participants information is not available for unmonitored devices. For example, customer or external devices.
- Note** Active Participants and Held Participants lists do not contain the expanded agent number, it contains only other participants in the call.
- **Duration:** The duration of the call.
 - **Call Status:** The current status of the call. Indicates the status of the expanded agent in the call.
 - **Queue Name:** The customer service queue to which the call belongs to.
-

View Recent Call History

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

Procedure

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

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

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

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

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

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

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

View Recent State History

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

Procedure

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

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

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

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

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

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

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

Change the State of an Agent

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

Procedure

- Step 1** From the **Team Name** drop-down list, choose the agent's team.
- Step 2** From the displayed list, choose the agent whose state you want to change.
- Step 3** In the **Actions** tab of the selected agent, click ●●● and choose:

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

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

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

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

Monitor a Call

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

When an agent makes a manual outbound call from Not Ready state, the silent monitoring button on the team performance gadget on your desktop is enabled. You can silently monitor the agent's call. However, you cannot change the state of the agent to Ready or Not Ready.

Procedure

- Step 1** From the **Team Name** drop-down list, choose the team whose agents you want to monitor.
- Step 2** From the displayed list, choose an agent to monitor.
- Step 3** In the **Actions** tab of the selected agent, click ●●● > **Monitor**.

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

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

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

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

Barge In on a Call

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



Note

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

Procedure

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

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

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

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

Step 4 Click **Barge In**.

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

Intercept a Call

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

Procedure

- Step 1** Click the **Drop** drop-down.
- Step 2** Click the agent to drop from the list of participants.



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

Send Team Message

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

Procedure

- Step 1** In the Finesse desktop, click the **Team Message** icon.
- Step 2** In the **Compose Message** box, enter the broadcast message (maximum number of characters allowed is 255).
- Step 3** Select the team or teams to send the message by checking the check box next to the team name.

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

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

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

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

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

**Note**

The rate at which messages (create/delete) are published to the teams involved, is capped at 100 per hour and the maximum number of active messages allowed is 1600. If the limit of active messages is reached, supervisors will not be able to broadcast new messages until an existing team message is deleted or it expires.

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

Advanced Capabilities for Supervisor

As a supervisor, you can now manage Queues, Applications, Calendars, and Outbound Campaigns.

- **Queue Management-** Manage resources across the assigned CSQs of your team.
- **Application Management-** Manage working hours, holidays, and prompts.
- **Calendar Management-** Edit the Business Hours, Custom Business Days, and Holidays.
- **Outbound Campaign Management-** Schedule, enable or disable outbound campaigns, and import contacts.

**Note**

The columns of all the tables available in **Advanced Supervisor Capability** gadget can be resized except for the tables in **Calendar View** (available in **Application Management**) and **Calendar Management** page.

When you click the **Application Management**, **Calendar Management**, or **Outbound Campaign Management** tab, the corresponding data is refreshed.

When you try to access **Advanced Capabilities** for the first time, if you do not have CA signed certificate, you are prompted to accept the Unified CCX certificates. Accept the certificates to enable all the functionalities.

Queue Management Summary

Queue Management displays the summary of Voice, Chat, and Email CSQs. Each CSQ summary is displayed based on the condition that at least one queue is assigned to the logged in supervisor. For example, if a supervisor is assigned to only Voice CSQ, only Voice CSQ Summary is displayed. The common fields for all the three CSQ summaries are as follows:

- **Queue Name-** Displays the queue names for the CSQ that are managed by the supervisor.
- **Team Name-** Displays the team names that are associated with the CSQ.
- **Agents Modified (Since Midnight)**
 - **Added-** Number of agents that are added to the CSQ.
 - **Removed-** Number of agents that are removed from the CSQ.
- **Action-** Provides a link to the **Manage Queue** page.

Voice CSQ Summary

Voice CSQ Summary displays statistics of the queues (for the current day, beginning at midnight) managed by the supervisor. It lists only the CSQs that are skill-based, that is, **Resource Skills** is selected for **Resource Pool Selection Model** in the queue configuration. The fields that are specific to **Voice CSQ Summary** are as follows:

- **Waiting Calls**- Number of calls that are in queue for the CSQ.
- **Abandoned Calls**- Number of calls that are not handled by the agents in the CSQ.
- **Longest Call in Queue**- Longest customer call waiting in the queue.

Chat CSQ Summary

Chat CSQ Summary displays statistics of the queues (for the current day, beginning at midnight) managed by the supervisor. The specific fields are as follows:

- **Waiting Contacts**- Number of contacts that are in queue for the CSQ.
- **Abandoned Contacts**- Number of contacts that are not handled by the agents in the CSQ.

Email CSQ Summary

Email CSQ Summary displays statistics of the queues (for the current day, beginning at midnight) managed by the supervisor. The specific fields are as follows:

- **Emails in Queue**- Number of emails that are in queue for the CSQ.
- **Emails in Process**- Number of emails that are delivered and waiting for response in the CSQ.

Manage Queue

Based on the queue that is selected in the **Queue Management** Summary window, corresponding **Manage Queue** window is displayed. All the agents, who are assigned to the selected queue are listed. You can click the column headers to sort information by **Agent Name**, **Agent ID**, **Team Name**, **Added by**, **Added at**, or **Remove at**. By default, the last added agent is listed at the top of the table. You can add and remove agents from the queue. The fields that are listed in the table are as follows:

- **Agent Name**- Name of the agent who is assigned to the queue.
- **Agent ID**- Login ID of the agent who is assigned to the queue.
- **Team Name**- Name of the agent's team.
- **Skills (Competency)**- Skills and competencies of the agent.
- **Added by**- Role and name of the resources who have added the agent to the queue.
- **Added at**- Date and Time at which the agent is added to the queue.
- **Remove at**- Date and Time at which the agent has to be removed from the queue. You can edit or cancel the schedule. Before saving the changes, you can revert to the previous scheduled time.

When you save, if the agent is associated with multiple queues, the impact of changes on all the associated queues is verified. If there is an impact, a confirmation message is displayed. Click **Yes** to update all the queues else click **No** to discard the changes.

- **Remove-** Option to remove the agent from the queue. You can remove only the agents who are part of your team.

Search

The search criteria is applicable only for **Agent Name** and **Agent ID**. To search for an agent, click the search icon. The search field expands in which, you can enter the search criteria to find the required agent. You can:

- Click **All** to list all the agents who are assigned to the queue.
- Click **Agents Added (Since Midnight)** to list all the agents, who are assigned to the queue since midnight.

Adding Agents to the Queue

Click **Add/Schedule Agents** button to add and schedule agents to the queue.

Related Topics

[Behavior of Adding and Removing Agents to CSQ](#), on page 105

Add and Schedule Agents for a Queue

You can add and schedule (add and remove) agents for the selected queue. Only the agents who are part of your team can be added and scheduled. When you click the **Add/Schedule Agents** button in the **Manage Queue** page, **Add Agents** page is displayed. The **Add Agents** page has **Agents Available** and **Agents Scheduled** tabs. By default, the **Agents Available** tab is selected. The fields that are listed in both the tabs are as follows:

- **Agent Name-** Name of the agent.
- **Agent ID-** Login ID of the agent.
- **Skills (Competency)-** Skills and competencies of the agent.
- **CSQs-** Names of the queues to which the agent belongs.
- **Team Name-** Name of the agent's team.
- **Add at-** Date and Time at which the agent has to be added to the queue. You can clear and undo the changes by using the icons that are available for each agent.
- **Remove at-** Date and Time at which the agent has to be removed from the queue. You can clear and undo the changes by using the icons that are available for each agent.

Agents Available

By default, all the logged in agents, who are not assigned to the queue are listed in the table. The table has two sections, **Agents with required skills and less competency** and **Agents without the required skills**. You can click the column headers to sort information by **Agent Name** or **Agent ID**. The sorting is within the respective sections in the table. You can click **Search** to search an agent by **Agent Name** or **Agent ID**. The agents can be added to the queue as follows:

Procedure

Step 1 Select **Include Logged Out Agents** to list all the logged out agents. To identify the logged out agents in the list, an asterisk is displayed next to the agent name. Based on the skills and competency, agents are appropriately listed in the respective sections of the table.

Note If **Include Logged Out Agents** is already selected, all the agents are listed. Clear **Include Logged Out Agents** so that only the agents who are logged in to Finesse desktop are listed in the table.

Step 2 Select one or more agents to be added to the queue.

Step 3 Select **Add at** to add the agent to the queue as per the schedule. Click the **Clear** icon to clear the schedule.

Note If you do not select the date and time, agent is immediately added to the queue.

Step 4 Select **Remove at** to remove agent from the queue as per the schedule. Click the **Clear** icon to clear the schedule.

Note If you do not select the date and time, agent remains associated with the queue.

Step 5 Click **Save** to add and schedule (add and remove) the selected agents for the CSQ. When you select a single agent to be scheduled or added immediately to the queue, you are directed to the **Agent Scheduled** tab or **Manage Queue** page respectively. If multiple agents are selected, a **Summary** page is displayed with the status of the agents who are being added and scheduled.

While adding or removing an agent for a queue, if there are common skills across queues, a confirmation message is displayed. Based on the confirmation, the changes impact all the queues that have common skills to which the agent is associated.

If you select **No**, the action is canceled. If you select **Yes**, the update is as follows:

Add Impact

- If date and time are not selected for **Add at**, the agent is immediately added to the selected queue and to all the impacted queues.
- If date and time are selected for **Add at**, the agent is scheduled to be added to the selected queue. At the scheduled time, the agent is added to the selected queue and to all the impacted queues.

Remove Impact

- If date and time are selected for **Remove at**, the agent is scheduled to be removed from the selected queue.
- At the scheduled time, the agent is removed from the selected queue and from all the impacted queues.

Status of Agents Added to a Queue

When you add more than one agent to the selected queue, the status of agents being added is displayed in the **Status of Agents Added** page. The fields that are displayed are as follows:

- **Agent Name**- The name of the selected agent.

- **Agent ID**- The login ID of the selected agent.
- **Status**- Visual indication of the agents being added to the queue.
- **CSQs**- List of all the CSQs that the agent is assigned to. The list is displayed only after the agent is added to the queue.
- **Remarks/Action**- If an agent is not added or scheduled (added and removed) for the queue, the reason for the failure is displayed.

While adding and removing agents for the queue, if there are common skills across impacted queues, a confirmation message is displayed for each agent.

The **Done** button is enabled after the task for all the agents is complete.



Note If you close this page before all the tasks are complete, the page cannot be retrieved. The tasks that need confirmation (for adding or scheduling) are aborted.

Agents Scheduled

You can view the agents who are scheduled to be added to a queue. All the agents, who are scheduled to be added to the queue are listed in the table. If **Include Logged Out Agents** is already selected, all the agents are listed. Clear **Include Logged Out Agents** so that only the agents who are logged in to Finesse desktop are listed in the table. You can click the column headers to sort information by **Agent Name** or **Agent ID**. You can click **Search** to search an agent by **Agent Name** or **Agent ID**. The agents can be scheduled for the queue as follows:

Procedure

- Step 1** Select **Include Logged Out Agents** to list the agents who are logged out of Finesse desktop.
To identify the logged out agents in the list, an asterisk is displayed next to the agent name.
- Step 2** Select **Add at** to add or modify the date and time of the schedule. Click the **Clear** icon to clear the schedule. Click the **Undo** icon to revert to the previous schedule.
Note When you clear **Add at**, the **Add at** schedule is cleared and the **Remove at** schedule is disabled.
After clearing **Add at**, click the **Undo** icon to revert to the previous schedule. The **Add at** schedule is retrieved and the **Remove at** schedule is enabled.
- Step 3** Select **Remove at** to add or modify the date and time of the schedule. Click the **Clear** icon to clear the schedule. Click the **Undo** icon to revert to the previous schedule.
Note When you clear **Remove at**, only the **Remove at** schedule of that agent is cleared.
After clearing **Remove at**, click the **Undo** icon to revert to the previous schedule.
- Step 4** Click **Save** to save the modified schedule.
If you modify the schedule of only one agent, you will remain on the same page, where the success or error message is displayed. If you have modified the schedule of more than one agent, a **Summary** page is displayed with the status of the agents who are being rescheduled.

Note If the **Add at** schedule of the agents are cleared, the schedules of those agents are canceled and are listed in the **Agents Available** tab.

The add and remove impact scenarios are same as mentioned in **Agents Available**.

Status of Agents' Schedule Changes

When you modify the schedule of more than one agent for the selected queue, the changes in status are displayed on the **Agents Schedule Change Status** page. The fields that are displayed are as follows:

- **Agent Name**- The name of the selected agent.
- **Agent ID**- The login ID of the selected agent.
- **Status**- Visual indication of the schedule that is being modified.
- **Remarks**- If rescheduled details are not saved, the reason for failure is displayed.

While saving rescheduled details of the agents, if there are common skills across impacted queues, a confirmation message is displayed for each agent.

The **Done** button is enabled after the tasks of all the agents are complete.



Note If you close this page before all the tasks are complete, the page cannot be retrieved. The tasks that need confirmation (for rescheduling) are canceled.

Remove Agents from a Queue

You can remove agents from the selected queue. In the **Remove** column, the remove icon is highlighted only for the agents who are part of your team.



Note You can remove only one agent at a time.

Procedure

- Step 1** Click the remove icon of the respective agent.
A confirmation message is displayed.
- Step 2** Click **Yes** to remove the agent from the queue.
If removing the agent from the selected queue impacts other queues, a confirmation message is displayed.
- Step 3** Click **Yes** to remove the agent from the selected queue and from all the impacted queues.
If the agent is removed from the queue, a success message is displayed else a failure message is displayed.
- Step 4** Click **No** to retain the agent in the selected queue and in all the impacted queues.

When you select **No**, it overrides the earlier selection for delete.

Related Topics

[Behavior of Adding and Removing Agents to CSQ](#), on page 105

Application Management

Application Management displays the list of script-based applications and its details. The applications that are listed are based on the configuration by the administrator. As a supervisor, you can manage the applications that are assigned to you. The fields that are displayed are as follows:

- **Name**- Displays the application name that is assigned to the logged in supervisor.
- **Description**- The description of the application that is provided by the administrator.
- **Enabled**- Indicates whether the application is active. You can also manage the disabled applications.
- **Triggers**- The triggers that are associated with the application.
- **Action**- Link to the **Manage Application** screen.

Manage Application

The required prompts and calendars can be associated with the applications that are assigned to you. The prompts and calendars are available in **Script Parameters** and **Default Script Parameters** tab. In the **Prompts** tab, all the prompts that are associated with the application are displayed. The list contains only the user uploaded prompts. In the **Calendars** tab, all the calendars that are configured are listed. By default, **Script Parameters** tab and **Parameters** tab are selected.



Note The **Default Script Parameters** tab is displayed only when a default script is associated with the application. When there is an error in execution of the other script that is configured, the Default Script is run.

Procedure

- Step 1** In the **Prompts** tab of the **Script Parameters** tab, select the required prompts from the list. By default, the prompts that are assigned by the administrator are selected.
- a) Select **None**, if you do not want to assign any prompt.
 - b) Click **Yes** to confirm the selection.
- Only the relative path of the prompt is displayed. The absolute path (language specific) is selected based on the system configuration.
- If the script selected by the administrator has a default prompt, **Default Prompt** is selected for the corresponding prompt in the **Prompts** tab.
- Step 2** Click the **Play** icon, which is next to the selected prompt to listen to the prompt.
- You cannot play a **Default Prompt**.

If the prompt that you have selected is available in more than one language, you have to select a language to play the prompt. Based on the language configured by the administrator, corresponding language prompts are played to the customers.

Note If you use Internet Explorer browser, the selected prompt is downloaded to the local system and will start playing with the available default media player.

Step 3 Click **Save**.

If you try to navigate out of this tab without saving, a confirmation message is displayed to save the changes.

Step 4 Select the **Calendars** tab.

Step 5 In the **Calendars** tab, select the required calendars from the list.

- a) Select **None**, if you do not want to assign any calendar.
- b) Click **Yes** to confirm the selection.

Step 6 Click the preview icon, which is next to the selected calendar to view the calendar details.

Step 7 Click **Save** to associate the selected prompts and calendars with the application.

If you try to navigate out of this tab without saving, a confirmation message is displayed to save the changes.

Step 8 Select the **Default Script Parameters** tab.

Based on the default script that is selected by the administrator, the parameters for prompts and calendars are selected.

Step 9 Modify the required prompts and calendars.

Step 10 Click **Save** to make the selected prompts and calendars as part of the default script.

Calendar Management

Calendar Management displays the list of calendars and its details. The calendars that are listed are based on the configuration by the administrator. As a supervisor, you can manage the calendars that are assigned to you. The fields that are displayed are as follows:

- **Name**- Displays the calendar name that is associated with the logged in supervisor.
- **Description**- Describes the calendar that is provided by the administrator.
- **Time Zone**- Displays the configured time zone of the calendar.
- **Business Hours**- Displays **Fixed** and **Flexible** hours that are configured for the calendar.
- **Custom Business Days**- Indicates whether custom business days have been configured for the calendar. The indication is displayed even if one custom business day is configured.
- **Holidays**- Indicates whether holidays have been configured for the calendar. The indication is displayed even if one holiday is configured.
- **Associated with**- Lists the names of chats and IVR applications that are associated with the calendar.
- **Action**- Link to the **Manage Calendar** page.

Manage Calendar

As a supervisor, you can modify the following details (available as tabs) in the calendars that are assigned to you:

- **Business Hours**
- **Custom Business Days**
- **Holidays**

For the calendar that you have selected, the following information is displayed:

- **Time Zone**- Displays the configured time zone of the selected calendar.
- **Associated with**- Displays the associated IVR application and chat for the selected calendar.
- **Description**- Displays the description of the calendar that is configured by the administrator.

The details that are available in each tab are as follows:

Business Hours- Based on the requirement, different working hours can be configured. The following three types of time range are provided. By default, the **Business Hours** tab is selected.

- **24 x 7 days**- You can select this option if the contact center works 24 hours and 7 days in a week.
- **Fixed Hours**- You can select this option when the business has fixed working hours for the selected business days of the week. A maximum of three time ranges can be configured.
- **Flexible Hours**- You can select this option when the business has different working hours for different days of the week. You can also configure different working hours for each day of the week. You can configure up to three time ranges for each day.

Custom Business Days- The special days when the contact center works apart from the regular business days with different time range. When a different time range is specified, the Unified CCX engine overrides any previous schedule that was configured in **Custom Business Hours** for the same day.

Holidays- In addition to the defined holidays, the contact center can declare a holiday or reschedule the defined holidays. You can either modify the existing holidays or add more holidays by specifying the day and the date.

Modify Business Hours

When the Custom (Fixed) or Custom (Flexible) hours are not configured, by default **24 Hours x 7 Days** is selected.

Procedure

-
- Step 1** Select **Fixed Hours**. By default, **Monday** to **Friday** is selected.
 - Step 2** Check or uncheck the days from the **Day** column.
 - Step 3** Select the working hours, **From** and **To** from **Time Range 1** column. Similarly, select working hours for **Time Range 2** and **Time Range 3**.

The time range is applicable for all the days that are selected in the **Day** column. The order of selection is from **Time Range 1** to **Time Range 3**.

Step 4 Click **Save**.

If you have different working hours for different days, configure as follows:

Step 5 Select **Flexible Hours**. By default, **Monday to Friday** is selected.

If you have made some changes in **Fixed Hours**, a confirmation message is displayed to save the changes. Clicking **Yes** updates the database.

Step 6 Check or uncheck the days from the **Day** column.

Step 7 Select the working hours, **From** and **To** from **Time Range 1** column for each day. Similarly, select working hours for **Time Range 2** and **Time Range 3**.

The time range has to be configured for each selected day.

Step 8 Click **Save**.

Custom Business Days

If custom business days are configured, the same is displayed, else it is blank.

You can add and delete custom business days.

Procedure

Step 1 Enter a name for the custom business day in **Name of the Day** column.

Step 2 Select a date in **Date** column.

Step 3 Select the working hours, **From** and **To** from **Time Range 1** column. Similarly, select working hours for **Time Range 2** and **Time Range 3**.

Step 4 Click **Add Day** to add a custom business day.

Step 5 Click the delete icon to delete the corresponding custom business day.

Step 6 Click **Save**.

Holidays

You can add, modify and delete holidays. You can also add more holidays to a calendar.

Procedure

Step 1 Enter a holiday name in the **Name of the Day** column.

Step 2 Select a date in **Date** column.

Step 3 Click **Add Day** to add more holidays.

Step 4 Click the delete icon to delete a holiday.

Step 5 Click **Save**.

Outbound Campaign Management

Outbound Campaign Management lists the campaigns and its details that are assigned to the logged in supervisor. The fields that are displayed are as follows:

- **Campaign Name**- Displays the campaign name that is associated with the logged in supervisor.
- **Campaign Type**- There are two types of campaign, **Agent** and **IVR**. The type indicates whether the outbound calls are handled by agents or IVR.



Note Callback option is not available for IVR campaigns.

- **Dialer Type**- There are three types of dialer, **Direct Preview**, **Predictive**, and **Progressive**. **Predictive** and **Progressive** dialers are available for both types of campaign. **Direct Preview** is available only for the **Agent** type campaign.
- **Time**- Displays the **From** and **To** time of the campaign, which can be edited. You can save the edited time or revert. The timing is applicable for every day as long as the campaign is enabled.
- **Contacts Remaining**- Displays the number of contacts that are yet to be dialed for the campaign. During manual import of contacts, the import status is also displayed in this column.
- **Enabled**- Displays a toggle button that can be used to enable or disable a campaign.
- **Action**- A link to the **Update Contacts** page, where you can delete the existing contacts, import new contacts and modify auto import schedule.

Update Contacts

Update Contacts window provides information about the number of contacts that are to be dialed out. You can delete the contacts. You can manually import contacts and schedule the import of contacts for the campaign.



Note For reference, the server time zone is displayed at the bottom of the window.

Procedure

- Step 1** Click **Update Contacts** for the required campaign in the **Outbound Campaign Management** tab.
- Step 2** The **Update Contacts** page displays the following:

Field	Description
Contacts Remaining	The number of contacts that are yet to be dialed for the campaign.
Manual Import	To import the contacts that are to be dialed for the campaign. This tab is selected by default.
Schedule Import	To schedule import of contacts that are to be dialed for the campaign.

Field	Description
	Note If you want the option to schedule import of contacts for a campaign, contact your administrator.

Step 3 Click the **Delete** icon to delete the contacts from the database. Delete is applicable for contacts that are imported manually and through **Schedule Import**.

A confirmation message is displayed.

Step 4 Click **Yes** to delete the contacts.

The campaign is disabled, contacts are deleted, and the value of **Contacts Remaining** is updated to **0**.

Manual Import of Contacts

You can manually import contacts from a CSV file (in .csv or .txt format) into the Unified CCX database. The **Manual Import** tab displays the date and time of the last import.

Procedure

Step 1 Click **Select File**, browse, and select the file that you want to import.

Step 2 Enable **Allow Duplicate Contacts** if you want to save duplicate contacts in the database.

Step 3 Select appropriate fields from **Column 1** to **Column 7** in the same order as they are in the CSV file.

Predictive and Progressive Campaigns have six columns and Direct Preview Campaigns have seven columns.

Step 4 Click **Save**. The contacts from the selected file are imported into the Unified CCX database. The progress of importing contacts is displayed at the top of the page. If you close the page, the progress is displayed in the **Contacts Remaining** column of the **Outbound Campaign Management** page.

Note During manual import, if you go to the **Update Contacts** page the status is displayed at the top the page and the **Delete** icon is disabled. After the import of contacts is complete, the **Contacts Remaining** and **Last Import** information is updated and the **Delete** icon is enabled.

Schedule Import of Contacts

You can schedule import of contacts into the Unified CCX database that is used for outbound campaigns. A CSV file (in .csv or .txt format) that is available in the configured path (by administrator) can be scheduled for import of contacts. The **Schedule Import** tab displays the date and time of the last import.

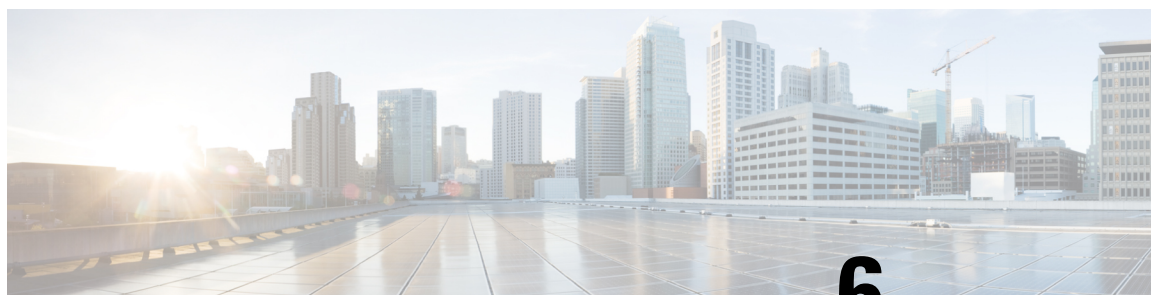
Procedure

Step 1 Enable **Allow Duplicate Contacts** if you want to save duplicate contacts in the database.

Step 2 Select appropriate fields from **Column 1** to **Column 7** in the same order as they are in the CSV file.

Predictive and Progressive Campaigns have six columns and Direct Preview Campaigns have seven columns.

- Step 3** Select appropriate **Start Date**.
- Step 4** Select appropriate **Start Time**.
- Step 5** Select **Repeat Every Hours**, if the contacts are being updated regularly.
- Step 6** Enable **Schedule**.
- Step 7** Click **Save**. A confirmation message is displayed.
The contacts from the predefined file are imported into the Unified CCX database at the scheduled date and time. To view the status of the scheduled import of contacts, revisit this tab.
-



CHAPTER 6

Finesse IP Phone Agent Tasks

- [Finesse IP Phone Agent, on page 89](#)
- [Sign In to Finesse on the IP Phone, on page 90](#)
- [Change State on the IP Phone, on page 92](#)
- [Apply Wrap-Up Reason on the IP Phone, on page 93](#)
- [Sign Out of Finesse on the IP Phone, on page 93](#)
- [Recover Finesse IP Phone Agent Service After Failure, on page 94](#)
- [Set Finesse Service and Credentials Using the Self Care Portal, on page 94](#)
- [Finesse IPPA Behavior, on page 95](#)

Finesse IP Phone Agent

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

Supervisor Tasks

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

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

Agent Tasks

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

Task	Steps
Sign In	<ul style="list-style-type: none">• Press Services > Cisco Finesse.• Enter your ID, password, and extension.• Press SignIn.

Task	Steps
Change State	Press Ready or NotReady .
Apply Wrap-Up Reasons	Press WrapUp and select from the list.
CData	Press CData from the queue statistics screen during the call to view Call Data information.
View Queue Statistics data	Press QStats from the Call Data screen during the call to view queue statistics data.
Refresh	Press Refresh to view the latest queue statistics data during the call.
Sign Out	From the Not Ready state, press SignOut .

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

Sign In to Finesse on the IP Phone

Before you begin

Your administrator must set up your Finesse IPPA access.

Procedure

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



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

Step 2 Select **Cisco Finesse**.

Step 3 Enter your agent ID (or username), password, and extension, and press **SignIn**.



Note • The **ID** (Finesse IPPA) in Unified CCX deployments refers to the AgentID.

The home screen appears and the following options on queue statistics is displayed:



- **Your State:** Current call state - Ready or Not Ready (Your call state is Not Ready by default. Press Ready to change the state).
- **Calls Queued:** Number of calls waiting across queues assigned to you.
- **Longest Queue Time:** Longest queue time across queues assigned to you.
- **Last Updated:** Last refreshed time of the Queue Statistics data (auto update happens every 15 seconds).

Step 4 While in talking state, if you wish to view queue statistics data from the call data screen, press **QStats**.



Step 5 To go back to the call data screen, press **CData**.



Note

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

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

Change State on the IP Phone

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

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

Procedure

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

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

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

After the call ends, you can change your selected reason code by pressing the **NotReady** button again and selecting a different reason.

Apply Wrap-Up Reason on the IP Phone

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

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



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

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

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

Procedure

- Step 1** Press **WrapUp** during or after the call and select a Wrap-Up reason from the list.
- Step 2** To end the Wrap-Up state after the call ends, select your new state (Ready or NotReady) or wait for the preconfigured timer to expire.

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

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

Sign Out of Finesse on the IP Phone

Before you begin

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

Procedure

- Step 1** Press the **SignOut** button.
- Step 2** If Sign Out reason codes appear, select the desired Sign Out reason, and press the **Select** button.

Recover Finesse IP Phone Agent Service After Failure

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

Procedure

-
- Step 1** Press **Retry** to retry the current Finesse service.
- Step 2** If the issue is not resolved, sign in to an alternate Finesse service:
- Press **Exit** to exit the current Finesse service.
 - Press the **Services** button.
 - Select an alternate **Cisco Finesse** service from the menu.
 - Enter your agent ID, password, and extension, and press the **SignIn** button.
-



Note

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

Set Finesse Service and Credentials Using the Self Care Portal

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

Procedure

-
- Step 1** Use your ID and password to sign in to the Self Care Portal from the following URL:
- `http://UCM address/ucmuser`
- Where *UCM address* is the address of Cisco Unified CM provided by your administrator.
- Step 2** On the Self Care Portal, navigate to **Phones > Phone Settings > Services**.
- Step 3** Select the phone that you want to subscribe to the Finesse service.
- Step 4** If your administrator has already subscribed this phone to the Finesse service, click the **Edit Service** icon for the Finesse service, and go to Step 7. Else, go to Step 5.
- Step 5** Click **Add New Service** for the phone and select the Finesse service from the drop-down.

- Step 6** In the Display Name field, enter **Cisco Finesse** (or another display name that is appropriate for your phone).
- Step 7** If your administrator requests that you enter your credentials, enter the required values for your agent id, password, and extension.
- Step 8** Click **Save**.
-

What to do next

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

Finesse IPPA Behavior

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

Call Data Display

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

Phone Behavior When You Make a Call

- If you make a call from the Ready state, Finesse IPPA changes your state to Not Ready and displays the Finesse screen. Similarly, if you make a call without first navigating to the home phone screen, sometimes the IP Phone changes the display to the Finesse screen. In either case, to view the dialed numbers, navigate back to the home phone screen.
- If you call a busy number, the IP Phone first displays a **Busy** message, and then Finesse displays a **Talking** message until you end the call. You can safely ignore the **Talking** message.

Reserved and Hold State Not Displayed

- Unlike the Finesse desktop, Finesse IPPA does not display Reserved or Hold states. Instead, Finesse IPPA continues to display the previous state that applied (for example, Ready or Talking) before you move to reserved or are on hold. The one exception to this behavior occurs when you receive a direct call from another agent while in the Not Ready state. In this case, Finesse IPPA continues to display the Not Ready state.

No Wrap Up on Transferred Calls

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

Additional Finesse IPPA Behavior

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



CHAPTER 7

Troubleshooting

- Chat is down due to temporary outages, on page 97
- You are not configured for Chat and Email, on page 97
- An Error Occurred While Joining the Chat Room, on page 98
- Chat Disconnected, on page 98
- Cannot Load Predefined Responses, on page 98
- Manage Chat and Email Gadget is Blank, on page 98
- Auto Accept of Email Failed, on page 99
- Unable To Load or Reply to Customer Email, on page 99
- Connectivity Issues, on page 99
- Customer Email Not Found, on page 100
- Email Being Worked On by Another Agent, on page 100
- Editing Email Reply Is Slow, on page 100
- Unable to Display Attachments, on page 100
- Images in Customer Email Do Not Appear, on page 101

Chat is down due to temporary outages

If a component fails, the Chat and Email Control gadget displays the following error message:

Chat is down due to temporary outages.

What to do?

- If the chat window is not dimmed, you can continue with the active chat sessions. If the chat window is dimmed, or you are ready to end a chat session, click **End** to close the chat session.
- If the error is displayed when you are performing an action on the Chat and Email Control gadget, retry after some time to check whether the system has recovered.

You are not configured for Chat and Email

When you log in to the Finesse desktop, the Chat and Email Control gadget displays the following error message:

You are not configured for Chat and Email.

What to do?

Contact your administrator.

An Error Occurred While Joining the Chat Room

You accept a chat contact and the following error appears:

An error occurred while joining the chat room.

What to do?

The connection to a system component is down. Contact your administrator.

Chat Disconnected

If a connection failure occurs during your initial attempt to join the chat session or after you join the chat session, the following error appears:

Chat disconnected.

What to do?

- Click **End** to close the chat session. The chat contact is marked as discarded.
- If the condition persists, contact your administrator.

Cannot Load Predefined Responses

You are in a chat session. No error appears on the desktop but the Predefined Response icon is dimmed.

What to do?

Contact your administrator.

Manage Chat and Email Gadget is Blank

The Manage Chat and Email gadget contains no content (is completely blank). No error message appears.

What to do?

A system service is down. Contact your administrator.

Auto Accept of Email Failed

If auto accept of email fails, the following error message appears on the Manage Chat and Email gadget and you are automatically moved to "Not Ready" state:

Unable to accept Emails. Please contact your administrator for assistance.

What to do?

If the condition persists, contact your administrator.

Unable To Load or Reply to Customer Email

You click the tab for an email contact in the Manage Chat and Email gadget or you click Send to reply to an email contact and one of the following messages appears:

- Unable to retrieve customer's email. Contact your system administrator.
- Unable to reply to customer's email. Click Send to retry. If the problem persists, contact your system administrator.

What to do?

If the error appears when you click the tab for an email contact:

1. Click the **Close Tab** link that appears beside the error message to remove the contact from the desktop.
2. Contact your system administrator.

If the error appears when you click Send to reply to an email contact:

1. Click **Send** to attempt to send the reply again.
2. If the operation fails again, click the **Close Tab** link that appears beside the error message to remove the contact from the desktop.
3. Contact your system administrator.

Connectivity Issues

When a system component is down or a network problem exists, one of the following errors appears on the Manage Chat and Email gadget:

- Unable to retrieve customer's email due to a server connectivity issue. Contact your system administrator.
- Unable to reply to customer's email due to a server connectivity issue. Contact your system administrator.

What to do?

Contact your system administrator.

Customer Email Not Found

You click the tab for an email contact in the Manage Chat and Email gadget or you click Send to reply to an email contact and one of the following messages appears:

- Customer's email was not found. Contact your system administrator.
- Unable to retrieve customer's email. It may have been deleted. Contact your system administrator.
- Unable to reply to customer's email. It may have been deleted. Contact your system administrator.

What to do?

1. Click the **Close Tab** link that appears beside the error message to remove the contact from the desktop.
2. Contact your system administrator.

Email Being Worked On by Another Agent

You click the tab for an email contact in the Manage Chat and Email gadget and the following error message appears:

`This email is currently being worked on by another agent.`

What to do?

Click the **Close Tab** link that appears beside the error message to remove the contact from the desktop. You can then continue to work on other email contacts.

Editing Email Reply Is Slow

If an email reply is extremely large, editing the reply may become so slow that the desktop is unusable.

What to do?

Use attachments to send some of the information to the customer instead of including everything in the body of the email reply.

Unable to Display Attachments

You click the tab of an email contact to view the customer email and one of the following messages appears:

- Unable to display attachments: The number of attachments cannot exceed 10.
- Unable to display attachments: The total size of all attachments cannot exceed 10 MB.
- Unable to display attachments: The size of a single attachment cannot exceed 2 MB.

What to do?

Although you cannot download the customer attachments, you can still view the text in the email body and reply to the customer. Send the customer a reply to let them know that you did not receive the email attachments. You can also indicate why the attachments could not be downloaded and ask the customer to resend.

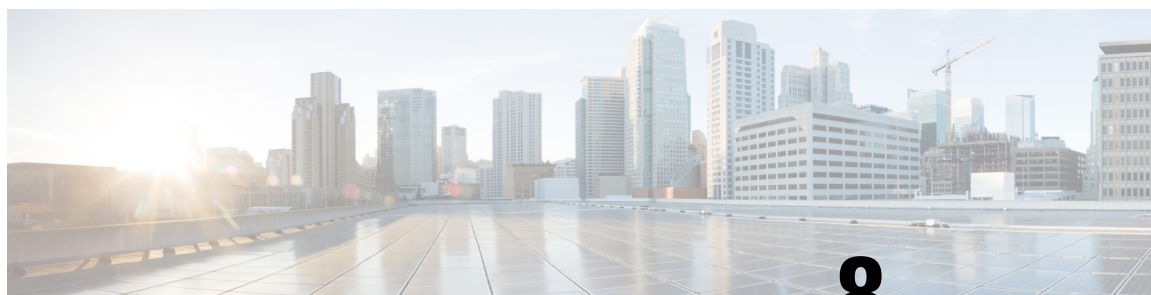
Images in Customer Email Do Not Appear

A customer includes an image within the body of an email message. The image does not appear in the email message when you view it in Finesse. This problem can occur because of the differences in how images are handled by different email clients.

No error appears in Finesse when this occurs. However, a customer may ask if you received the picture they sent or something similar.

What to do?

Let the customer know that you did not receive the image. Ask the customer to resend it as an attachment.



CHAPTER 8

CiscoWebex Experience Management

- [Cisco Webex Experience Management Gadgets, on page 103](#)

Cisco Webex Experience Management Gadgets

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

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

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

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



Note

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



APPENDIX A

Behavior of Adding and Removing Agents to CSQ

When you add or remove agents to CSQ, the skills and competencies of the agents are updated to match the queue requirements. The changes are explained with an example. In this example, the following are considered:

Skills: English, Sales, and Services

Agent Name: Michael

Supervisor Name: Sandra

CSQ details:

CSQ Name	Skill(Competency)
SalesQueue	English(8), Sales(5)
ServicesQueue	English(5), Services(5)
GeneralQueue	English(8)

Assumptions:

- All scenarios start with empty skills for an agent, unless explained in the specific scenario.
- Supervisor uses Advanced Capabilities in Finesse to add and remove agents to CSQ.
- Administrator uses Unified CCX Administration UI to add and remove agents to CSQ.
- There are no two queues with similar skills and competencies.

Add strategy: When supervisors add agents to a queue, the skills and competencies of the agents that are required to be part of the queue are updated at the server.

Remove strategies: When a supervisor removes an agent from a queue, two strategies **Minimal Impact** and **Revert** are adopted.

- **Minimal Impact strategy-** Reduces the competency of a skill or removes the skill, such that the agent is removed from the queue and impact on the other queues is minimal.
- **Revert strategy-** Revert the operation that is done during Add by removing the respective skills.

The behavior is explained by considering some of the scenarios.

Scenario 1- Before upgrading unified CCX to 12.0 release, administrator adds Michael to SalesQueue. After upgrading to unified CCX 12.0 release, Sandra removes Michael from SalesQueue.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
No Skill	Admin adds Michael to SalesQueue	English(8), Sales(5)	Add Note Michael is also part of GeneralQueue because the skill English(8) is common for both the queues.
English(8), Sales(5)	Sandra removes Michael from SalesQueue	English(8), Sales(4)	Minimal Impact Note As Michael was added to the queue by administrator before upgrading to unified CCX 12.0 release, the competency of the Sales skill is reduced by 1.

Scenario 2- Sandra adds Michael to SalesQueue and later removes him from SalesQueue.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
No Skill	Sandra adds Michael to SalesQueue	English(8), Sales(5)	Add Note Michael is also added to GeneralQueue because the skill English(8) is common for both the queues.
English(8), Sales(5)	Sandra removes Michael from SalesQueue	No Skill	Revert Note Michael is removed from GeneralQueue also.

Scenario 3- Sandra adds Michael to SalesQueue and ServicesQueue. Later she removes him first from ServicesQueue and then from SalesQueue.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
No Skill	Sandra adds Michael to SalesQueue	English(8), Sales(5)	Add Note Michael is also added to GeneralQueue because the skill English(8) is common for both the queues.
English(8), Sales(5)	Sandra adds Michael to ServicesQueue	English(8), Sales(5), Services(5)	Add
English(8), Sales(5), Services(5)	Sandra removes Michael from ServicesQueue	English(8), Sales(5)	Revert
English(8), Sales(5)	Sandra removes Michael from SalesQueue	No Skill	Revert

Scenario 4- Sandra adds Michael to SalesQueue and ServicesQueue. Later she removes him first from SalesQueue and then from ServicesQueue.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
No Skill	Sandra adds Michael to SalesQueue	English(8), Sales(5)	Add Note Michael is also added to GeneralQueue because the skill English(8) is common for both the queues.
English(8), Sales(5)	Sandra adds Michael to ServicesQueue	English(8), Sales(5), Services(5)	Add
English(8), Sales(5), Services(5)	Sandra removes Michael from SalesQueue	English(8), Services(5)	Revert Note Revert is partially applied. Only Sales skill is removed and the common skill and competency English(8) is retained.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
English(8), Services(5)	Sandra removes Michael from ServicesQueue	English(8)	Revert Note Only Services skill is removed. English(8) is not removed because Michael is part of the GeneralQueue. In this scenario, Sandra has to manually remove Michael from the GeneralQueue.

Scenario 5- Sandra adds Michael to GeneralQueue and ServicesQueue. Later she removes him first from GeneralQueue and then from the ServicesQueue.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
No Skill	Sandra adds Michael to GeneralQueue	English(8)	Add
English(8)	Sandra adds Michael to ServicesQueue	English(8), Services(5)	Add
English(8), Services(5)	Sandra removes Michael from GeneralQueue	English(7), Services(5)	Minimal Impact Note A minimal change is made to the competency of the common skill English so that the required skills and competencies are maintained.
English(7), Services(5)	Sandra removes Michael from ServicesQueue	No Skill	Revert Note As part of Revert strategy, only Services skill is removed. After the revert operation English(7) skill is also removed because it is not associated with any queue and no longer required by Michael.

Scenario 6- Sandra adds Michael to GeneralQueue and SalesQueue. Later she removes him first from GeneralQueue and then from the SalesQueue.

Agent Skill(Competency) before Action	Action	Agent Skill(Competency) after Action	Strategy
No Skill	Sandra adds Michael to GeneralQueue	English(8)	Add
English(8)	Sandra adds Michael to SalesQueue	English(8), Sales(5)	Add
English(8), Sales(5)	Sandra removes Michael from GeneralQueue	No Skill	Revert Note As the skill English(8) is common for both GeneralQueue and SalesQueue, Minimal Impact or Partial Revert cannot be applied. Michael will be removed from both the queues.



APPENDIX **B**

Chat - Customer Experience

This appendix describes the experience of the customer who uses the chat functionality.

- [Bubble Chat Experience, on page 111](#)
- [Agent Reports, on page 112](#)
- [Supervisor Reports, on page 125](#)

Bubble Chat Experience

Bubble chat can be launched on any device and the display adapts to the screen size of the device used. For example, if you launch the bubble chat using a desktop, a small chat pop-over appears on the right-side bottom of the web page. If you use a mobile device, the bubble chat launches in the full-screen mode.

To use Bubble chat, ensure that:

- The browser cookies and third-party cookies are enabled.
- The Tracking Protection option in the browser is disabled.
- The Customer Collaboration Platform server and customer website are in the same domain so that the bubble chat works on various browsers.



Note For more information about cookies and Tracking Protection option, see your browser-specific documentation.

The chat process is as follows:

1. The customer initiates the chat by clicking a text link, button, or icon.
The chat form attempts to collect the details of the customer, such as, name, email, phone number etc. The form also presents a list of problem statements - from which the customer has to mandatorily select one.
2. The customer provides details in the chat form and submits it.
3. The chat pop-over opens with a welcome message, such as 'Thanks for contacting. We will be with you shortly'. If all the agents are busy, an appropriate message appears.

When the agent joins the chat, the customer is notified by a message, and the pop-over divides into a conversation area (where messages appear) and a typing area (where the customer can type messages for the agent).

4. The customer and agent chat - more than one agent can join the chat to create a group chat. While chatting, the agent's messages are displayed on the left of the conversation area and the customer's messages are displayed on the right. All messages are displayed with the timestamp below the message (in the 24-hour format); the agent's message will additionally have the agent's name before the timestamp.

The chat pop-over can be minimized or maximized.

The following indicators appear on the chat pop-over at appropriate times:

- Agent typing indicator: This indicator, represented by three squiggly dots, appears above the typing area whenever the agent types.
 - New messages indicator: The pop-over blinks in a minimized state whenever a new event occurs during the chat, such as the receipt of a new message, joining of another agent, connection problems etc.
 - Agent left/joined indicator: The customer is informed when an agent leaves or joins the chat.
5. When the customer completes the chat and attempts to exit the chat, the following pop-ups are displayed in a sequence:
 - a. A chat closure confirmation box.
 - b. A chat transcript download box. The customer can choose to download the chat transcript.
 - c. A chat rating box, if rating is enabled for the chat. The customer can choose to rate or skip rating by closing this box.



Note

Any connectivity or technical problems that are encountered during the chat session are notified as banner messages at the top of the conversation area.

Agent Reports

Agent CSQ Statistics Report

The Agent CSQ Statistics Report presents the current day's call queue statistics, since midnight, of the Contact Service Queues (CSQ) to which the agent is associated.

Charts

None

Fields

The report includes a table that displays the following information:

Field	Description
Agent ID	Login ID of the agent.
CSQ Name	Name of the CSQ.
Calls Waiting	Number of calls in queue for a CSQ.
Longest Call in Queue	Elapsed wait time of the oldest call in the queue.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Team Name	Displays information for the CSQs that belong to the specified teams.



Note

Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Recent State History Report

The Recent State History Report presents the agent state and duration in that state and the reason (where applicable) for the current day, since midnight.

Charts

None

Fields

The report includes a table that displays the following information:

Field	Description
Agent ID	Login ID of the agent. Note This field is not listed in Gadget View.
Start Time	Time the agent state is initiated.
State	State of the agent—Login, Logout, Not Ready, Ready, Reserved, Talking, or Work.

Field	Description
Reason	<p>The reason selected by the agent moving to Logout state or Not Ready state. This displays the reason code if the reason label is unavailable. A blank is due to any one of the following:</p> <ul style="list-style-type: none"> • No logout reason code is configured. • Agent was unable to enter a reason. • Reason codes for all other states except Not Ready and Logout. <p>To view a list of reason codes and their descriptions, see the “Predefined” reason codes section below.</p>
Duration	<p>Time duration that the agent was in that state.</p> <p>Note Finesse Desktop client machines should be time synchronized with a reliable NTP server for the correct updates to the Duration fields within Live Data reports.</p>

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Predefined Reason Codes

Reason Code	State	Event	Event Description
22	Logout	SUP_AGT_TO_LOGOUT	Supervisor changes an agent's state to Logout.
33	Ready/Not Ready	SUP_AGT_TO_READY/SUP_AGT_TO_NOT READY	Supervisor changes an agent's state to either Ready or Not Ready.
255	Logout	—	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.

Reason Code	State	Event	Event Description
32741	Logout	ICD_EXTENSION_CONFLICT	If an agent has already logged in and another agent tries to login with the same extension number, then the previously logged in agent will be logged out by the system.
32742	Not Ready	AGT_SEC_LINE_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.
32745	OUTBOUND	OUTBOUND_WORK_REASONCODE	This reason code is set when an agent goes into the Work state to select a wrap up code after ending an outbound call.
32746	OUTBOUND	AGENT_RESERVED_OUTBOUND_DIRECT_PREVIEW	This reason code is set when an agent goes into a Reserved state for a direct preview outbound call.
32747	OUTBOUND	AGENT_RESERVED_OUTBOUND	This reason code is set when an agent goes into a Reserved state for an agent progressive or predictive outbound call.
32748	Logout	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.
32749	Not Ready	CANCEL_FEATURE	<p>Agent's state changes from Talking to Not Ready because the Cancel feature is triggered during an Interactive Call Distribution (ICD) consult call between two agents.</p> <p>When the consulting agent presses the Cancel softkey on the phone, the consulted agent is no longer associated with the ICD call, and the consulted agent's state changes to Not Ready. This feature is available only on some of the newer phones.</p>
32750	Not Ready	AGT_IPCC_EXT_CHANGED	Agent is logged out from Unified CCX because the agent's Unified CCX extension changes in Unified Communications Manager.
32751	Ready	AGENT_SKIPS	Agent receives a preview outbound call and skips the call.
32752	Ready	CANCEL_RESERVATION	Agent receives a preview outbound call, decides to cancel the reservation, and presses the Cancel Reservation button on the desktop.

Reason Code	State	Event	Event Description
32753	Not Ready	LINE_RESTRICTED	<p>Agent's phone line is flagged as a restricted device by the administrator of Unified Communications Manager.</p> <p>Attention If an agent's line is added to the restricted list, it affects the function of RmCm subsystem.</p> <p>If Allow Control of Device from CTI is not checked in the Default Device Profile Configuration window in Unified Communications Manager, the line remains restricted and cannot be controlled. You can modify this setting for devices that register with Unified Communications Manager. See the <i>Cisco Unified Communications Manager Administration Guide</i>, located at: https://www.cisco.com/en/US/products/sw/voicesw/ps556/prod_maintenance_guides_list.html.</p>
32754	Not Ready	DEVICE_RESTRICTED	<p>Agent's device is flagged as a restricted device by the administrator of Unified Communications Manager.</p> <p>Attention If an agent's device is added to the Restricted list, it affects the function of RmCm subsystem.</p> <p>If Allow Control of Device from CTI is not checked in the Default Device Profile Configuration window in Unified Communications Manager, the device remains restricted and cannot be controlled. You can modify this setting for devices that register with Unified Communications Manager. See the <i>Cisco Unified Communications Manager Administration Guide</i>, located at: https://www.cisco.com/en/US/products/sw/voicesw/ps556/prod_maintenance_guides_list.html.</p>

Reason Code	State	Event	Event Description
32755	Not Ready	CALL_ENDED	<p>Agent moves to Not Ready state after handling a Unified CCX call. This event occurs in the following cases:</p> <ul style="list-style-type: none"> • Agent 1 is in Not Ready state and gets a consult call from Agent 2. After handling the call, Agent 1 moves back to Not Ready state. • The Automatic Available option is disabled for the agent. After handling a call, agent moves to Not Ready state.
32756	Not Ready	PHONE_UP	Agent's phone becomes active after it was in Phone Down state.
32757	Not Ready	CM_FAILOVER	Unified Communications Manager fails over, and the agent is moved to Not Ready state.
32758	Not Ready	WORK_TIMER_EXP	Agent's state changes 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.
32759	Not Ready	PHONE_DOWN	Agent's phone stops functioning and the agent is placed in the Unavailable state.
32760	Not Ready	AGT_LOGON	Agent logs in and is automatically placed in the Not Ready state.
32761	Not Ready	AGT_RCV_NON_ICD	Agent is logged in to the desktop or IP phone and receives a call that is not queued on the Unified CCX platform.
32762	Not Ready	AGT_OFFHOOK	Agent goes off hook to place a call. If the agent enters a reason, that reason is displayed. If the agent does not select any reason, the system issues this reason code.
32766	Logout	CLOSE_CAD	Agent closes the desktop without logging out.
32763	Not Ready	AGT_RNA	Agent fails to answer a Unified CCX call within the specified timeout period.
32764	Logout	CRS_FAILURE	Active server becomes the standby server, and the agent loses connection to the Unified CCX platform.
32765	Logout	CONNECTION_DOWN	IP Phone Agent or desktop stops functioning, or connection is disrupted.

Reason Code	State	Event	Event Description
32766	Logout	CLOSE_FINESSE_DESKTOP	Agent manually logs out from the Finesse Desktop using the default Logout (without any custom reason label) option.
32767	Logout	AGT_RELOGIN	Agent is logged in to one device (computer or phone) and tries to log in to a second device.

Recent Call History Report

The Recent call History Report presents the recent call history details like the start time, duration of the call, type of call, phone number, contact disposition, queue and Wrap-Up reasons for the current day, since midnight.

The following call based scenarios are not reported:

- Consult calls between any two agents.
- Outbound campaign calls and any such type of calls that were transferred or conferenced.

Charts

None

Fields

The report includes a table that displays the following information:

Field	Description
Agent ID	Login ID of the agent.
Type	Type of the call. For example, Inbound or Outbound.
Number	Phone number of the call. To view a list of reason codes and their descriptions, see the “Predefined” reason codes section below.
Disposition	Contact disposition type of the call.
Wrap-Up Reason	Wrap-Up Reasons entered by the agent.
Queue	Queue details that the call was routed to.
Start Time	Start time of the call.
Duration	Time duration of the call. Note Finesse Desktop client machines should be time synchronized with a reliable NTP server for the correct updates to the Duration fields within Live Data reports.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Agent Statistics Report

The Agent Statistics Report presents performance statistics of the agents for the current day, since midnight.

Charts

None

Fields

The report includes a table that display the following information:

Field	Description
Agent ID	Login ID of the agent.
Calls Offered	Calls sent to the agent, regardless of whether the agent picks up the call.
Calls Handled	Calls connected to the agent.
Talk Time—Avg	Average time the agent spent in Talking state. Average talk time = Total time in Talking state / Calls handled
Talk Time—Max	Longest time the agent spent in Talking state.
Talk Time—Total	Total time the agent spent in Talking state.
Hold Time—Avg	Average time the agent put the calls on hold. Average hold time = Total time the calls were on hold / Calls handled
Hold Time—Max	Longest time the agent put a call on hold.
Hold Time—Total	Total time the agent put the calls on hold.

Field	Description
Ready—Avg	Average time the agent spent in Ready state. Average ready time = Total time the agent spent in Ready state / Number of times the agent moved to Ready state
Ready—Max	Longest time the agent spent in Ready state.
Ready—Total	Total time the agent spent in Ready state.
Not Ready—Avg	Average time the agent spent in Not Ready state. Average not ready time = Total time the agent spent in Not Ready state / Number of times the agent moved to Not Ready state
Not Ready—Max	Longest time the agent spent in Not Ready state.
Not Ready—Total	Total time the agent spent in Not Ready state.
After Call Work—Avg	Average time the agent spent in Work state. Average work time = Total time in Work state / Calls completed
After Call Work—Max	Longest time the agent spent in Work state.
After Call Work—Total	Total time the agent spent in Work state.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Agent Team Summary Report

The Agent Team Summary Report presents the agent state and the reason (where applicable). An agent can view details of all the agents in the team.

Charts

None

Fields

The report includes a table that displays the following information:

Field	Description
Agent Name	First name and last name of the agent.
State	State of the agent—Logged-In, Logout, Not Ready, Ready, Reserved, Talking, or Work.
Reason	<p>The reason selected by the agent when moving to Logout state or Not Ready state. This displays the reason code if the reason is unavailable. A blank is due to one of the following:</p> <ul style="list-style-type: none"> • No logout reason code is configured. • Agent was unable to select a reason. • Reason codes for all other states except Not Ready and Logout. <p>To view a list of reason codes and their descriptions, see the “Predefined” reason codes section below.</p>

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Predefined Reason Codes

Reason Code	State	Event	Event Description
22	Logout	SUP_AGT_TO_LOGOUT	Supervisor changes an agent's state to Logout.
33	Ready/Not Ready	SUP_AGT_TO_READY/SUP_AGT_TO_NOT_READY	Supervisor changes an agent's state to either Ready or Not Ready.
255	Logout	—	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.

Reason Code	State	Event	Event Description
32741	Logout	ICD_EXTENSION_CONFLICT	If an agent has already logged in and another agent tries to login with the same extension number, then the previously logged in agent will be logged out by the system.
32742	Not Ready	AGT_SEC_LINE_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.
32745	OUTBOUND	OUTBOUND_WORK_REASONCODE	This reason code is set when an agent goes into the Work state to select a wrap up code after ending an outbound call.
32746	OUTBOUND	AGENT_RESERVED_OUTBOUND_DIRECT_PREVIEW	This reason code is set when an agent goes into a Reserved state for a direct preview outbound call.
32747	OUTBOUND	AGENT_RESERVED_OUTBOUND	This reason code is set when an agent goes into a Reserved state for an agent progressive or predictive outbound call.
32748	Logout	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.
32749	Not Ready	CANCEL_FEATURE	<p>Agent's state changes from Talking to Not Ready because the Cancel feature is triggered during an Interactive Call Distribution (ICD) consult call between two agents.</p> <p>When the consulting agent presses the Cancel softkey on the phone, the consulted agent is no longer associated with the ICD call, and the consulted agent's state changes to Not Ready. This feature is available only on some of the newer phones.</p>
32750	Not Ready	AGT_IPCC_EXT_CHANGED	Agent is logged out from Unified CCX because the agent's Unified CCX extension changes in Unified Communications Manager.
32751	Ready	AGENT_SKIPS	Agent receives a preview outbound call and skips the call.
32752	Ready	CANCEL_RESERVATION	Agent receives a preview outbound call, decides to cancel the reservation, and presses the Cancel Reservation button on the desktop.

Reason Code	State	Event	Event Description
32753	Not Ready	LINE_RESTRICTED	<p>Agent's phone line is flagged as a restricted device by the administrator of Unified Communications Manager.</p> <p>Attention If an agent's line is added to the restricted list, it affects the function of RmCm subsystem.</p> <p>If Allow Control of Device from CTI is not checked in the Default Device Profile Configuration window in Unified Communications Manager, the line remains restricted and cannot be controlled. You can modify this setting for devices that register with Unified Communications Manager. See the <i>Cisco Unified Communications Manager Administration Guide</i>, located at: https://www.cisco.com/en/US/products/sw/voicesw/ps556/prod_maintenance_guides_list.html.</p>
32754	Not Ready	DEVICE_RESTRICTED	<p>Agent's device is flagged as a restricted device by the administrator of Unified Communications Manager.</p> <p>Attention If an agent's device is added to the Restricted list, it affects the function of RmCm subsystem.</p> <p>If Allow Control of Device from CTI is not checked in the Default Device Profile Configuration window in Unified Communications Manager, the device remains restricted and cannot be controlled. You can modify this setting for devices that register with Unified Communications Manager. See the <i>Cisco Unified Communications Manager Administration Guide</i>, located at: https://www.cisco.com/en/US/products/sw/voicesw/ps556/prod_maintenance_guides_list.html.</p>

Reason Code	State	Event	Event Description
32755	Not Ready	CALL_ENDED	Agent moves to Not Ready state after handling a Unified CCX call. This event occurs in the following cases: <ul style="list-style-type: none"> • Agent 1 is in Not Ready state and gets a consult call from Agent 2. After handling the call, Agent 1 moves back to Not Ready state. • The Automatic Available option is disabled for the agent. After handling a call, agent moves to Not Ready state.
32756	Not Ready	PHONE_UP	Agent's phone becomes active after it was in Phone Down state.
32757	Not Ready	CM_FAILOVER	Unified Communications Manager fails over, and the agent is moved to Not Ready state.
32758	Not Ready	WORK_TIMER_EXP	Agent's state changes 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.
32759	Not Ready	PHONE_DOWN	Agent's phone stops functioning and the agent is placed in the Unavailable state.
32760	Not Ready	AGT_LOGON	Agent logs in and is automatically placed in the Not Ready state.
32761	Not Ready	AGT_RCV_NON_ICD	Agent is logged in to the desktop or IP phone and receives a call that is not queued on the Unified CCX platform.
32762	Not Ready	AGT_OFFHOOK	Agent goes off hook to place a call. If the agent enters a reason, that reason is displayed. If the agent does not select any reason, the system issues this reason code.
32766	Logout	CLOSE_CAD	Agent closes the desktop without logging out.
32763	Not Ready	AGT_RNA	Agent fails to answer a Unified CCX call within the specified timeout period.
32764	Logout	CRS_FAILURE	Active server becomes the standby server, and the agent loses connection to the Unified CCX platform.
32765	Logout	CONNECTION_DOWN	IP Phone Agent or desktop stops functioning, or connection is disrupted.

Reason Code	State	Event	Event Description
32766	Logout	CLOSE_FINESSE_DESKTOP	Agent manually logs out from the Finesse Desktop using the default Logout (without any custom reason label) option.
32767	Logout	AGT_RELOGIN	Agent is logged in to one device (computer or phone) and tries to log in to a second device.

Supervisor Reports

Agent Outbound Team Summary Report

The Agent Outbound Team Summary Report provides performance statistics of the agents in the team for direct preview, progressive, and predictive outbound campaigns. The following two views are available for this report:

- **Short and Long Term Average**—Provides the performance statistics of the agents who handle outbound calls for the current day based on short term and long term values.
- **Since Midnight**—Provides the performance statistics of the agents in the team who handle outbound calls for the current day, beginning at midnight.



Note

- Your administrator can set the short term value to 5, 10, or 15 minutes.
- Long term value is set to 30 minutes.

Charts

None

Fields

The following view-wise tables are included in the report.

Table 5: Short and Long Term Average

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Average Talk Time—Short Term	Average time the agent spent in Talking state for outbound calls in the last 5, 10, or 15 minutes.

Field	Description
Average Talk Time—Long Term	Average time the agent spent in Talking state for outbound calls in the last 30 minutes.
Average Hold Time—Short Term	Average time the agent put the outbound calls on hold in the last 5, 10, or 15 minutes.
Average Hold Time—Long Term	Average time the agent put the outbound calls on hold in the last 30 minutes.

Table 6: Since Midnight

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Talk Time—Avg	Average time the agent spent in Talking state for outbound calls. Average talk time = Total time in Talking state / calls handled
Talk Time—Max	Longest time the agent spent in Talking state for outbound calls.
Talk Time—Total	Total time the agent spent in Talking state for outbound calls.
Hold Time—Avg	Average time the agent put the outbound calls on hold. Average hold time = Total time calls were put on hold / calls handled
Hold Time—Max	Longest time the agent put an outbound call on hold.
Hold Time—Total	Total time the agent put the outbound calls on hold.
After Call Work Time—Avg	Average time the agent spent in Work state for outbound calls. Average work time = Total time in Work state / calls completed
After Call Work Time—Max	Longest time the agent spent in Work state for outbound calls.
After Call Work Time—Total	Total time the agent spent in Work state for outbound calls.

Filter Criteria

You can filter using the following parameter:

Filter Parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Chat Agent Statistics Report

The Chat Agent Statistics Report provides agent statistics.

Charts

None

Fields

The report includes a table that displays the following information:

- Visible fields—These fields are displayed in the report.
- Hidden fields—These fields are not displayed in the report. You can customize the report to display these fields. For more information, see the *Cisco Unified Contact Center Express Report User Guide*, located at:

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

Table 7: Visible Fields in Chat Agent Statistics Report

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Current State	State of the agent—Logged-In, Logout, Not Ready, Ready, Partial Busy, Busy, Reserved.
Duration	Time that the agent spent in the current state. Note Finesse Desktop client machines should be time synchronized with a reliable NTP server for the correct updates to the Duration fields within Live Data reports.
Current Active Contacts	Number of contacts that the agent is handling.
Contacts Presented	Number of contacts that are offered to the agent since midnight.
Contacts Handled	Number of contacts that are handled by the agent since midnight. A contact is marked handled if a contact is connected to an agent.

Field	Description
Contacts Abandoned	Number of contacts that are routed to the CSQ since midnight but are not answered by an agent, because the customer ends the chat or the customer is disconnected. This also includes the number of group chats that were abandoned when these were routed to a CSQ. They are abandoned when the group chat is not accepted by the second agent. This can be due to, either the chat submitter or the first agent ended the chat before the second agent accepted or was disconnected.
Contacts RNA	Number of contacts that the agent did not answer since midnight. Ring-no-answer (RNA).
Contacts Declined	Number of group chat contacts that are declined by the agent since midnight.

Table 8: Hidden Fields in Chat Agent Statistics Report

Field	Description
Login Duration	Elapsed time between the login time and the logout time since midnight.
CSQs Serving	List of CSQs that the agent is serving.
Agent Utilization—Not Ready	Percentage of time that the agent spent in Not Ready state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Ready	Percentage of time that the agent spent in Ready state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Partial Busy	Percentage of time that the agent spent in Partial Busy state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Busy	Percentage of time that the agent spent in Busy state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.

Filter Criteria

You can filter using the following parameter:

Filter Parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.

Grouping Criteria

None

Chat CSQ Summary Report

The Chat CSQ Summary Report provides agent statistics and contact statistics for a Contact Service Queue (CSQ).

Charts

None

Fields

The report includes a table that displays the following information:

- Visible fields—These fields are displayed in the report.
- Hidden fields—These fields are not displayed in the report. You can customize the report to display these fields. For more information, see the *Cisco Unified Contact Center Express Report User Guide*, located at:

<http://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-user-guide-list.html>.

Table 9: Visible Fields in Chat CSQ Summary Report

Field	Description
CSQ Name	Name of the CSQ.
Contacts Waiting	Number of contacts in queue for a CSQ.
Agents—Logged-In	Number of agents in Logged-In state.
Agents—Not Ready	Number of agents in Not Ready state.
Agents—Ready	Number of agents in Ready state.
Agents—Partial Busy	Number of agents in Partial Busy state. An agent is set to Partial Busy state when the agent has not reached the maximum number of chat sessions that is set by the administrator.
Agents—Busy	Number of agents in Busy state. An agent is set to Busy state when the agent reaches the maximum number of chat sessions that is set by the administrator.
Agents—Reserved	Number of agents in Reserved state.

Table 10: Hidden Fields in Chat CSQ Summary Report

Field	Description
Contacts Total	Number of contacts routed to the CSQ since midnight.
Contacts Handled	Number of contacts that are handled by the CSQ since midnight. A contact is marked handled if a contact is connected to an agent while queued for this CSQ.

Field	Description
Contacts Abandoned	Number of contacts that are routed to the CSQ since midnight but are not answered by an agent, because the customer ends the chat or the customer is disconnected.

Filter Criteria

You can filter using the following parameter:

Filter Parameter	Result
Queue Name	Displays information for the CSQs that belong to the specified queues.

Grouping Criteria

None

Email Agent Statistics Report

The Email Agent Statistics Report provides the email statistics of the agents.

Charts

None

Fields

The report includes a table that displays the following information:

- Visible fields—These fields are displayed in the report.
- Hidden fields—These fields are not displayed in the report. You can customize the report to display these fields. For more information, see the *Cisco Unified Contact Center Express Report User Guide*, located at:

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

Table 11: Visible Fields in Email Agent Statistics Report

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
State	State of the agent—Not Ready, Ready, Partial Busy, Busy, Reserved.

Field	Description
Duration	Time that the agent spent in the current state. Note Finesse Desktop client machines should be time synchronized with a reliable NTP server for the correct updates to the Duration fields within Live Data reports.
Active Emails	Number of email messages that the agent is handling.
Emails Presented	Number of email messages that are presented to the agent since midnight. Note The number of emails that are presented include new and requeued emails.
Emails Handled	Number of email messages that are handled by the agent since midnight.
Emails Discarded	Number of email messages discarded by the agent or by the system during service disruption. The system discarded emails would be reinjected into the system when the service is restored.
Emails Requeued	Number of email messages that the agent requeued since midnight.

Table 12: Hidden Fields in Email Agent Statistics Report

Field	Description
Login Duration	Elapsed time between the login time and the logout time since midnight.
CSQs Serving	List of CSQs that the agent is serving.
Agent Utilization—Not Ready	Percentage of time that the agent spent in Not Ready state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Ready	Percentage of time that the agent spent in Ready state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Partial Busy	Percentage of time that the agent spent in Partial Busy state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Busy	Percentage of time that the agent spent in Busy state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.
Agent Utilization—Reserved	Percentage of time that the agent spent in Reserved state since midnight. It is calculated every minute and is one of the components that add up to the agent's total login duration.

Filter Criteria

You can filter using the following parameter:

Filter Parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.

**Note**

Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Email CSQ Summary Report

The Email CSQ Summary Report presents the email activity summary of agents in a Contact Service Queue (CSQ).

Charts

None

Fields

The report includes a table that displays the following information:

- Visible fields—These fields are displayed in the report.
- Hidden fields—These fields are not displayed in the report. You can customize the report to display these fields. For more information, see the *Cisco Unified Contact Center Express Report User Guide*, located at:

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

Table 13: Visible Fields in Email CSQ Summary Report

Field	Description
CSQ Name	Name of the Email CSQ.
Emails in Queue	Number of email messages in queue. (This includes the emails requested by the agent.) Note System requeues email messages that are in agents desktop when agents sign off or loose connectivity.
Emails in Process	Number of email messages that are assigned to agents.
Emails Discarded	Number of email messages that have been discarded, both by agents and due to service disruptions.

Field	Description
Agents-Logged In	Number of agents in Logged-In state.
Agents-Not Ready	Number of agents in Not Ready state.
Agents-Ready	Number of agents in Ready state.
Agents-Partial Busy	Number of agents in Partial Busy state. Agents are set to Partial Busy state as soon as an email is assigned to them. They will continue to be in this state until they clear all the emails assigned to them or the state changes to Busy.
Agents-Busy	Number of agents in Busy state. Agents are set to Busy state when the number of emails reach the maximum limit set. Agents state is changed to Partial Busy as soon as the number of assigned email messages is one less than the maximum limit set.

Table 14: Hidden Fields in Email CSQ Summary Report

Field	Description
Emails Total	Number of email messages routed to the CSQ since midnight.
Emails Handled	Number of email messages that are handled by the CSQ since midnight. An email is marked handled if it is responded by an agent while queued for this CSQ.

Filter Criteria

You can filter using the following parameter:

Filter Parameter	Result
Queue Name	Displays information for the CSQs that belong to the specified queues.

Grouping Criteria

None

Team State Report

The Team State Report presents each agent state and the time spent in a state. The supervisor can see agents of all the assigned teams.

Charts

None

Fields

The report includes a table that displays the following information:

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Login Duration (since midnight)	Time the agent logged in since midnight.
Current State	State of the agent—Logged-In, Logout, Not Ready, Ready, Reserved, Talking, or Work.
Duration	Time that the agent spent in the current state. Note Finesse Desktop client machines should be time synchronized with a reliable NTP server for the correct updates to the Duration fields within Live Data reports.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Team Summary Report

The Team Summary Report presents performance statistics of all the agents in the team. The following two views are available for this report:

- **Short and Long Term Average**—Presents the performance statistics of the team members for the current day based on short term and long term values.
- **Since Midnight**—Presents the performance statistics for the current day, since midnight.



- Note**
- Your administrator can set the short term value to 5, 10 or 15 minutes.
 - Long term value is set to 30 minutes.

Charts

None

Fields

The following are the view-wise tables that are part of the report:

Table 15: Short and Long Term Average

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Login Duration (since midnight)	Total login duration of the agent, since midnight.
Average Talk Time—Short Term	Average time the agent spent in Talking state in the last 5, 10 or 15 minutes.
Average Talk Time—Long Term	Average time the agent spent in Talking state in the last 30 minutes.
Average Hold Time—Short Term	Average time the agent put the calls on hold in the last 5, 10 or 15 minutes.
Average Hold Time—Long Term	Average time the agent put the calls on hold in the last 30 minutes.

Table 16: Since Midnight

Field	Description
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Login Duration	Total login duration of the agent.
Calls Offered	Number of calls that are sent to the agent, regardless of whether the agent answered the call.
Calls Handled	Number of calls that are answered by the agent.
Average Ring Time	Average ring time of calls before the calls were answered. Average ring time = Total ring time / Calls handled
Talk Time—Avg	Average time the agent spent in Talking state. Average talk time = Total time in Talking state / Calls handled
Talk Time—Max	Longest time the agent spent in Talking state.

Field	Description
Talk Time—Total	Total time the agent spent in Talking state.
Hold Time—Avg	Average time the agent put the calls on hold. Average hold time = Total time calls were put on hold / Calls handled
Hold Time—Max	Longest time the agent put a call on hold.
Hold Time—Total	Total time the agent put the calls on hold.
Ready Time—Avg	Average time the agent spent in Ready state. Average ready time = Total time the agent spent in Ready state / Number of times the agent moved to Ready state
Ready Time—Max	Longest time the agent spent in Ready state.
Ready Time—Total	Total time the agent spent in Ready state.
Not Ready Time—Avg	Average time the agent spent in Not Ready state. Average not ready time = Total time the agent spent in Not Ready state / Number of times the agent moved to Not Ready state
Not Ready Time—Max	Longest time the agent spent in Not Ready state.
Not Ready Time—Total	Total time the agent spent in Not Ready state.
After Call Work Time—Avg	Average time the agent spent in Work state. Average work time = Total time in Work state / Calls completed
After Call Work Time—Max	Longest time the agent spent in Work state.
After Call Work Time—Total	Total time the agent spent in Work state.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note

Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Voice CSQ Agent Detail Report

The Voice CSQ Agent Detail Report presents the agent current state, duration in the state and the reason code where applicable.



Note If an agent is configured in two or more CSQs, the Supervisor is able to view on which CSQ the agent is in Talking state.

Charts

None

Fields

The report includes a table that displays the following information:

Field	Description
CSQ	Name of the Contact Service Queue (CSQ).
Agent Name	First name and last name of the agent.
Agent ID	Login ID of the agent.
Current State	State of the agent—Logged-In, Logout, Not Ready, Ready, Reserved, Talking (from CSQ: <CSQ Name>), or Work.
Duration	Time that the agent spent in the current state. Note Finesse Desktop client machines should be time synchronized with a reliable NTP server for the correct updates to the Duration fields within Live Data reports.
Reason	The reason selected by the agent when moving to Logout state or Not Ready state. This displays the reason code if the reason is unavailable. A blank is due to any one of the following: <ul style="list-style-type: none">• No logout reason code is configured.• Agent was unable to enter a reason.• Reason codes for all other states except Not Ready and Logout. To view a list of reason codes and their descriptions, see the “Predefined” reason codes section below.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
Agent ID	Displays information for the agents who belong to the specified teams.



Note Filter parameters are applicable only for CUIC based reports and not Finesse live data.

Grouping Criteria

None

Predefined Reason Codes

Reason Code	State	Event	Event Description
22	Logout	SUP_AGT_TO_LOGOUT	Supervisor changes an agent's state to Logout.
33	Ready/Not Ready	SUP_AGT_TO_READY/SUP_AGT_TO_NOT READY	Supervisor changes an agent's state to either Ready or Not Ready.
255	Logout	—	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.
32741	Logout	ICD_EXTENSION_CONFLICT	If an agent has already logged in and another agent tries to login with the same extension number, then the previously logged in agent will be logged out by the system.
32742	Not Ready	AGT_SEC_LINE_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.
32745	OUTBOUND	OUTBOUND_WORK_REASONCODE	This reason code is set when an agent goes into the Work state to select a wrap up code after ending an outbound call.
32746	OUTBOUND	AGENT_RESERVED_OUTBOUND_DIRECT	This reason code is set when an agent goes into a Reserved state for a direct preview outbound call.
32747	OUTBOUND	AGENT_RESERVED_OUTBOUND	This reason code is set when an agent goes into a Reserved state for an agent progressive or predictive outbound call.

Reason Code	State	Event	Event Description
32748	Logout	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.
32749	Not Ready	CANCEL_FEATURE	<p>Agent's state changes from Talking to Not Ready because the Cancel feature is triggered during an Interactive Call Distribution (ICD) consult call between two agents.</p> <p>When the consulting agent presses the Cancel softkey on the phone, the consulted agent is no longer associated with the ICD call, and the consulted agent's state changes to Not Ready. This feature is available only on some of the newer phones.</p>
32750	Not Ready	AGT_IPCC_EXT_CHANGED	Agent is logged out from Unified CCX because the agent's Unified CCX extension changes in Unified Communications Manager.
32751	Ready	AGENT_SKIPS	Agent receives a preview outbound call and skips the call.
32752	Ready	CANCEL_RESERVATION	Agent receives a preview outbound call, decides to cancel the reservation, and presses the Cancel Reservation button on the desktop.
32753	Not Ready	LINE_RESTRICTED	<p>Agent's phone line is flagged as a restricted device by the administrator of Unified Communications Manager.</p> <p>Attention If an agent's line is added to the restricted list, it affects the function of RmCm subsystem.</p> <p>If Allow Control of Device from CTI is not checked in the Default Device Profile Configuration window in Unified Communications Manager, the line remains restricted and cannot be controlled. You can modify this setting for devices that register with Unified Communications Manager. See the <i>Cisco Unified Communications Manager Administration Guide</i>, located at: https://www.cisco.com/en/US/products/sw/voicesw/ps556/prod_maintenance_guides_list.html.</p>

Reason Code	State	Event	Event Description
32754	Not Ready	DEVICE_RESTRICTED	<p>Agent's device is flagged as a restricted device by the administrator of Unified Communications Manager.</p> <p>Attention If an agent's device is added to the Restricted list, it affects the function of RmCm subsystem.</p> <p>If Allow Control of Device from CTI is not checked in the Default Device Profile Configuration window in Unified Communications Manager, the device remains restricted and cannot be controlled. You can modify this setting for devices that register with Unified Communications Manager. See the <i>Cisco Unified Communications Manager Administration Guide</i>, located at: https://www.cisco.com/en/US/products/sw/voicesw/ps556/prod_maintenance_guides_list.html.</p>
32755	Not Ready	CALL_ENDED	<p>Agent moves to Not Ready state after handling a Unified CCX call. This event occurs in the following cases:</p> <ul style="list-style-type: none"> • Agent 1 is in Not Ready state and gets a consult call from Agent 2. After handling the call, Agent 1 moves back to Not Ready state. • The Automatic Available option is disabled for the agent. After handling a call, agent moves to Not Ready state.
32756	Not Ready	PHONE_UP	Agent's phone becomes active after it was in Phone Down state.
32757	Not Ready	CM_FAILOVER	Unified Communications Manager fails over, and the agent is moved to Not Ready state.
32758	Not Ready	WORK_TIMER_EXP	Agent's state changes 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.
32759	Not Ready	PHONE_DOWN	Agent's phone stops functioning and the agent is placed in the Unavailable state.
32760	Not Ready	AGT_LOGON	Agent logs in and is automatically placed in the Not Ready state.

Reason Code	State	Event	Event Description
32761	Not Ready	AGT_RCV_NON_ICD	Agent is logged in to the desktop or IP phone and receives a call that is not queued on the Unified CCX platform.
32762	Not Ready	AGT_OFFHOOK	Agent goes off hook to place a call. If the agent enters a reason, that reason is displayed. If the agent does not select any reason, the system issues this reason code.
32766	Logout	CLOSE_CAD	Agent closes the desktop without logging out.
32763	Not Ready	AGT_RNA	Agent fails to answer a Unified CCX call within the specified timeout period.
32764	Logout	CRS_FAILURE	Active server becomes the standby server, and the agent loses connection to the Unified CCX platform.
32765	Logout	CONNECTION_DOWN	IP Phone Agent or desktop stops functioning, or connection is disrupted.
32766	Logout	CLOSE_FINESSE_DESKTOP	Agent manually logs out from the Finesse Desktop using the default Logout (without any custom reason label) option.
32767	Logout	AGT_RELOGIN	Agent is logged in to one device (computer or phone) and tries to log in to a second device.

Voice CSQ Summary Report

The Voice CSQ Summary Report presents agent statistics and call statistics for a Contact Service Queue (CSQ). The following three views are available for this report:

- **Snapshot**—Presents the performance statistics of the agents that are associated with the specified CSQs.
- **Short and Long Term Average**—Presents the call statistics of the CSQ for the current day based on short term and long term values.
- **Since Midnight**—Presents the call statistics of the CSQ, since midnight.



Note

- Your administrator can set the short term value to 5, 10 or 15 minutes.
- Long term value is set to 30 minutes.

Charts

None

Fields

The following are the view-wise tables that are part of the report:

Table 17: Snapshot

Field	Description
CSQ Name	Name of the CSQ.
Waiting Calls	Number of calls in queue for a CSQ.
Longest Call in Queue	Elapsed wait time of the oldest call in the queue.
Agents Logged In	Number of agents in Logged-In state.
Agents Talking	Number of agents in Talking state.
Agents Ready	Number of agents in Ready state.
Agents Not Ready	Number of agents in Not Ready state.
Agents in After Call Work	Number of agents in Work state.
Agents Reserved	Number of agents in Reserved state.

Table 18: Short and Long Term Average

Field	Description
CSQ Name	Name of the CSQ.
Calls Abandoned—Short Term	Number of abandoned calls in the last 5, 10 or 15 minutes.
Calls Abandoned—Long Term	Number of abandoned calls in the last 30 minutes.
Calls Dequeued—Short Term	Number of dequeued calls in the last 5, 10 or 15 minutes.
Calls Dequeued—Long Term	Number of dequeued calls in the last 30 minutes.
Average Contact Handling Time—Short Term	Average handle time of the calls that are routed to the CSQ in the last 5, 10 or 15 minutes.
Average Contact Handling Time—Long Term	Average handle time of the calls that are routed to the CSQ in the last 30 minutes.
Average Waiting Duration—Short Term	Average wait time of the calls that are routed to the CSQ in the last 5, 10 or 15 minutes.
Average Waiting Duration—Long Term	Average wait time of the calls that are routed to the CSQ in the last 30 minutes.
Service Level—Short Term	Service level is measured in the last 5, 10 or 15 minutes. The most recent service level is displayed in case there are no calls in the measurement window.

Field	Description
Service Level—Long Term	Service level in the last 30 minutes.

Table 19: Since Midnight

Field	Description
CSQ Name	Name of the CSQ.
Waiting Calls	Number of calls in queue for a CSQ.
Abandoned Calls	Number of calls that are abandoned for a CSQ.
Handled Calls	Number of calls that are answered by the agents in the CSQ.
Total Calls	Number of calls that are presented to the CSQ.
Longest Call in Queue	Longest wait time of any call before it is answered.
Longest Handle Time	Longest talk time of any call that the agent handled.

Filter Criteria

You can filter using the following parameter:

Filter parameter	Result
CSQ Name	Displays information for the CSQs that belong to the specified queues.

Grouping Criteria

None

