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Change history

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<th>Change</th>
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<tbody>
<tr>
<td>Initial release of document</td>
<td>December 12, 2013</td>
</tr>
</tbody>
</table>

About this guide

The Cisco Finesse Desktop User Guide for Unified Contact Center Enterprise describes how to use the Finesse agent and supervisor desktop.
Audience

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

Organization

This guide is organized as follows:

<table>
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<tr>
<th>Chapter</th>
<th>Description</th>
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<tr>
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Related documents

<table>
<thead>
<tr>
<th>Document or resource</th>
<th>Link</th>
</tr>
</thead>
</table>

Documentation and support


You can also subscribe to the What's New in Cisco Product Documentation RSS feed to deliver updates directly to an RSS reader on your desktop. The RSS feeds are a free service. Cisco currently supports RSS Version 2.0.
Field Alerts and Field Notices

Note that Cisco products may be modified or key processes may be determined important. These are announced through use of the Cisco Field Alert and Cisco Field Notice mechanisms. You can register to receive Field Alerts and Field Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into www.cisco.com; then access the tool at: http://www.cisco.com/cisco/support/notifications.html

Documentation feedback

To provide comments about this document, send an email message to the following address:
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We appreciate your comments.

Conventions

This document uses the following conventions:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong> font</td>
<td>Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example:</td>
</tr>
<tr>
<td></td>
<td>• Choose <em>Edit</em> &gt; <em>Find</em>.</td>
</tr>
<tr>
<td></td>
<td>• Click <em>Finish</em>.</td>
</tr>
<tr>
<td><strong>italic</strong> font</td>
<td>Italic font is used to indicate the following:</td>
</tr>
<tr>
<td></td>
<td>• To introduce a new term. Example: A <em>skill group</em> is a collection of agents who share similar skills.</td>
</tr>
<tr>
<td></td>
<td>• For emphasis. Example: <em>Do not</em> use the numerical naming convention.</td>
</tr>
<tr>
<td></td>
<td>• A syntax value that the user must replace. Example: <em>IF (condition, true-value, false-value)</em></td>
</tr>
<tr>
<td></td>
<td>• A book title. Example: See the <em>Cisco Unified Contact Center Enterprise Installation and Upgrade Guide</em>.</td>
</tr>
<tr>
<td><strong>window</strong> font</td>
<td>Window font, such as Courier, is used for the following:</td>
</tr>
<tr>
<td></td>
<td>• Text as it appears in code or that the window displays. Example:</td>
</tr>
<tr>
<td></td>
<td>&lt;html&gt;&lt;title&gt;Cisco Systems,Inc. &lt;/title&gt;&lt;/html&gt;</td>
</tr>
<tr>
<td>Convention</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| < >        | Angle brackets are used to indicate the following:  
|            | • 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. |
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. This chapter describes the interface of the Finesse desktop for agents and for supervisors.

The Finesse desktop is customizable. Your administrator may add custom gadgets to the desktop or change the appearance. This guide discusses the Finesse desktop as it appears out of the box.

- Finesse agent desktop, page 1
- Finesse supervisor desktop, page 3
- Browser behavior, page 4
- Browser settings for Internet Explorer, page 5
- Finesse desktop failover, page 6
- One desktop session supported per agent, page 7

Finesse agent desktop

The following figure shows the Cisco Finesse desktop for agents as it appears when you first sign in. Your status is Not Ready.

Figure 1: Cisco Finesse agent desktop

After you sign in, you can change your status to Ready to make yourself available for calls. The buttons in the call control area change depending on the situation. For example, when you are on a call, Consult, Direct
Transfer, Hold, Keypad, and End buttons are available. When you have a call on hold and are on a consult call, Conference, Transfer, and Retrieve buttons are available. When you are on a conference call, buttons for Hold, Consult, Direct Transfer, Keypad, and End are available.

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

- Basic call control: Answer, hold, retrieve, end and make calls.
- Advanced call control: Make a consultation call and transfer or conference the call after the consultation.
- Single-step transfer: Transfer a call without the need to first initiate a consultation call.
- Preview Outbound Option calls: After you preview an Outbound Option call, you can choose to accept, reject, or close the contact.
- Send DTMF digits: Send DTMF digits to interact with an IVR system.
- Not Ready and Sign Out reason codes: Code to indicate why you are changing your status to Not Ready or signing out (your administrator defines these codes).
- Wrap-up reasons: Wrap-up reason for each call (your administrator defines the wrap-up reasons).
- Phonebooks: List of contacts from which you can select one to call (your administrator defines what contacts appear in your phonebook).
- Workflows: Your administrator can define workflows that are triggered by call events (for example, your administrator may create a workflow that causes a browser pop on your desktop when a call arrives).

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.

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

If you use Internet Explorer to access Finesse, you must ensure that your browser is not running in Compatibility View. If Compatibility View is enabled in your browser, the following message appears:

Your browser is now running in Compatibility View, which is not supported and may cause issues with Finesse. To continue, turn off Compatibility View.

To turn off Compatibility View, click the icon to the right of the address bar in your browser, or from your browser menu, select Tools > Compatibility View.
The following figure shows the Cisco Finesse desktop for supervisors.

\[\text{Figure 2: Finesse supervisor desktop}\]

In addition to the functionality provided by the agent desktop, the supervisor desktop also provides the following:

- **Team Performance gadget**
- **Queue Statistics 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, and their extension. You can 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 Finesse receives an agent state change event, the timer for that agent resets to 0. Time in state displays for all agent states except for Logged Out.

The Team Performance gadget also provides the following functionality:

- **Silent monitoring:** Silently monitor an agent call.
- **Force state change:** Force an agent into Ready state or sign an agent out.

When you silently monitor an agent, a Barge In button appears in the call control area. You can 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.

The Queue Statistics gadget displays a list of the queues for which you are responsible. You can click the column headers to sort the information in ascending or descending order.

The Queue Statistics gadget provides the following columns:

- **Queue Name:** The name of the queue
- **# Calls:** The number of calls waiting in the queue

\[\text{Cisco Finesse Desktop User Guide for Unified Contact Center Enterprise Release 10.0(1)}\]
Browser behavior

If the browser window for the Finesse desktop is minimized or behind another browser window, the browser window is restored or brought forward if any of the following occurs:

- A new call arrives on the desktop.
- You are signed out due to failover or inactivity.
- A supervisor signs you out.

The behavior of Finesse may differ depending on the browser used. The following table details the behavior of the Finesse desktop for the supported browsers.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finesse Desktop is minimized.</td>
<td>Internet Explorer and Firefox: Finesse restores back to size and position (on top of other windows).</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> If you are using Internet Explorer and have multiple tabs open, Finesse flashes in the task bar but does not come to the front.</td>
</tr>
</tbody>
</table>
### Result

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Result</th>
</tr>
</thead>
</table>
| Finesse Desktop is behind other non-browser windows. | Internet Explorer: Finesse flashes in the task bar.  
Firefox: Finesse does nothing.                        |
| Finesse is behind other browser windows.       | Internet Explorer: Finesse flashes in the task bar.  
Firefox: Finesse comes to the front.                 |

### Note

If you are using Internet Explorer to access the desktop, this feature works by default. If you use Firefox to access the desktop, you must perform the following steps for this feature to work.

1. Open the Mozilla Firefox browser and enter the following in the address bar: `about:config`
2. If a warning page appears that states this might void your warranty, click **I'll be careful, I promise**.
3. In the Search field, enter `dom.disable_window_flip`.
4. Double-click `dom.disable_window_flip` to set the value to `false`.

### Browser settings for Internet Explorer

If Internet Explorer is used to access the Finesse desktop, certain settings must be configured in the browser to ensure all features of Finesse work properly.

- Disable pop-up blockers.
- Finesse does not support Compatibility View. Make sure the desktop is not running in Compatibility View.

Configure the following privacy and advanced settings:

1. From the browser menu, select **Tools > Internet Options**.
2. Click the **Privacy** tab.
3. Click **Sites**.
4. In the Address of website box, enter the domain name for the Side A Finesse server.
5. Click **Allow**.
6. In the Address of website box, enter the domain name for the Side B Finesse server.
7. Click **Allow**.
8. Click **OK**.
9. On the Internet Options dialog box, click the **Advanced** tab.
10. Under Security, uncheck the **Warn about certificate address mismatch** check box.
11. Click **OK**.

You must 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:

1. From the Internet Explorer browser menu, select Tools > Internet Options.
2. Click the Security tab.
3. Click Custom level.
4. Under ActiveX controls and plug-ins, select Enable for Run ActiveX controls and plug-ins and Script ActiveX controls marked safe for scripting.
5. Under Scripting, select Enable for Active Scripting.

Finesse desktop failover

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

The Finesse desktop checks for the following:

• Whether the current Finesse server recovers its state
• Whether the alternate Finesse server is available

If the current Finesse server recovers, the desktop is reconnected. A banner appears that notifies you that you have successfully reconnected. If the current Finesse server does not recover but the alternate server is available, your desktop redirects to the alternate server and automatically signs you in.

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

Note

The Finesse desktop can only preserve a selection of Ready state that was made on the same desktop. The following exceptions apply:

• If you are in Wrap-Up state when the desktop recovers, Finesse does not send a request because doing so would automatically end your wrap-up session.

• Unsolicited state changes are not taken into account. For example, if a supervisor put you in Ready state (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 Not Ready (such as for Ring No Answer), your selection of Ready is preserved.
One desktop session supported per agent

Cisco Finesse supports only one desktop session at a time for each agent. If an agent signs in to the Finesse desktop and then tries to sign in to a second desktop session in another browser window or on another computer, on the same Finesse server, Finesse signs the agent out of the first desktop session.

If an agent signs in to Finesse and then opens another browser tab with the same URL, Finesse signs the agent out of the first session and automatically signs the agent in on the second tab. If the agent then opens a third tab with the same URL, the agent is taken to the sign-in page on the third tab. The agent remains signed in on the second tab and can continue to use the desktop. However, if the browser is refreshed, the agent is signed out of the second tab and presented with the sign in page.

It is possible for an agent to sign in to the desktop using the URL for one Finesse server and then sign in to the desktop using the URL for the alternate Finesse server. If the first server goes down and the desktop fails over to the alternate server, Finesse signs the agent out of the session on the alternate server.

Finesse does not support an agent signing in to two desktop sessions at the same time using the URL for each Finesse server.
One desktop session supported per agent
Common tasks

This chapter describes common tasks that agents and supervisors perform. These tasks include signing in and signing out of the desktop, changing your state, selecting reason codes and wrap-up reasons, and call control tasks.

- Sign in to the Finesse desktop, page 9
- Sign in as mobile agent, page 10
- Accept security certificates, page 11
- Accept certificates for Live Data gadget, page 12
- Sign out of the Finesse desktop, page 13
- Change your state, page 14
- Make a call, page 14
- Answer a call, page 14
- Answer an Outbound Option Preview call, page 15
- Initiate a consult call, page 15
- Transfer a call (single-step transfer), page 16
- Send DTMF, page 17
- Apply wrap-up reason, page 17

Sign in to the Finesse desktop

Procedure

Step 1 Enter the following URL in the address bar of your browser:
http://hostname, FQDN, or IP address of Finesse server/desktop/

where hostname, FQDN, or IP address is the hostname, fully-qualified domain name, or IP address of the Finesse server.
Sign in as mobile agent

When you sign in as a mobile agent, you can use any phone (home phone or mobile phone) that is accessible to the contact center phone system to receive calls.

For more information about using the mobile agent feature, see the Mobile Agent Guide for Cisco Unified Contact Center Enterprise & Hosted.

Procedure

Step 1 Enter the following URL in the address bar of your browser: http://hostname, FQDN, or IP address/, where hostname, FQDN, or IP address is the hostname, fully-qualified domain name, or IP address of the Finesse server.

Step 2 In the ID field, enter your username or agent ID.

Step 3 In the Password field, enter your password.

Step 4 In the Extension field, enter your extension. For a mobile agent, the extension represents your virtual extension, also known as the local CTI port (LPC).

Step 5 Check the Sign in as a Mobile Agent check box. The Mode and Dial Number fields appear.

Step 6 From the Mode drop-down list, choose the mode you want to use.

Example:
In Call by Call mode, your phone is dialed for each incoming call and disconnected when the call ends.
In Nailed Connection mode, your phone is called when you sign in and the line stays connected through multiple customer calls.

Step 7 In the Dial Number field, enter your phone number.

Step 8 Click Sign In.
In Nailed Connection mode, the desktop must receive and answer a setup call before sign-in is complete.

Step 9 Check to ensure that Finesse displays the following in the header:

- Mobile Agent before your agent name
Accept security certificates

The first time you sign in to the Finesse desktop, you may be prompted to accept security certificates before you can continue. Unless the certificates are deleted, you should only need to accept them once. These certificates allow the Finesse desktop to communicate over a secure connection to the Finesse server.

You must make sure pop-ups are enabled for the Finesse desktop.

Procedure

Step 1
Enter the URL for the Finesse desktop in your browser.

Step 2
If you use Internet Explorer:

a) A page appears that states there is a problem with the website's security certificate. Click Continue to this website (not recommended) to open the Finesse sign-in page.

b) Enter your agent ID or username, password, and extension, and then click Sign In.

The following message appears:

Establishing encrypted connection...

A dialog box appears that lists the certificates to accept.

Note: Depending on your browser settings, a window may open for each certificate you need to accept instead of a browser tab.

c) Click OK on the dialog box.

A new browser tab opens for each certificate you need to accept. A certificate error appears in the address bar.

Note: Depending on your browser settings, a window may open for each certificate you need to accept instead of a browser tab.

d) Click Certificate error and then click View Certificates to open the Certificate dialog box.

e) On the Certificate dialog box, click Install Certificate to open the Certificate Import Wizard.

f) On the Certificate Import Wizard, click Next.

g) Select Place all certificates in the following store, and then click Browse.

h) Select Trusted Root Certification Authorities, and then click OK.

i) Click Next.

j) Click Finish.

A Security Warning dialog box appears that asks if you want to install the certificate.

k) Click Yes.

A Certificate Import dialog box that states the import was successful appears.
l) Click OK.
m) Click OK on the Certificate dialog box.
n) Close the browser tab. You are asked to accept another certificate. Repeat the preceding steps until all certificates are accepted.
   After you accept all required certificates, the sign-in process completes.
   Note To remove the certificate error from the desktop, you must close and reopen your browser.

Step 3 If you use Firefox:
a) A page appears that states this connection is untrusted. Click I Understand the Risks, and then click Add Exception.
b) Ensure the Permanently store this exception check box is checked.
c) Click Confirm Security Exception.
   The Finesse sign-in page appears.
d) Enter your agent ID or username, password, and extension, and then click Sign In.
   The following message appears:
   Establishing encrypted connection...
   A dialog box appears that lists the certificates to accept.
e) Click OK.
   A browser tab opens for each certificate that you need to accept.
f) On each tab, click I Understand the Risks, and then click Add Exception.
g) Ensure the Permanently store this exception check box is checked.
h) Click Confirm Security Exception.
   Each tab closes after you accept the certificate.
   After you accept all required certificates, the sign-in process completes.

Accept certificates for Live Data gadget

The Cisco Unified Intelligence Center Live Data gadget provides reports that you can view in the Finesse desktop. If your desktop contains these reports, the first time you sign in, you may be prompted to accept security certificates.

Procedure

Step 1 Sign in to the Finesse desktop.
   The Cisco Unified Intelligence Center Live Data gadget displays a message that states Finesse is checking for connectivity. If Finesse detects that security certificates must be accepted, a message appears that lists the certificates that you must accept to use Cisco Unified Intelligence Center.
   Note Each Cisco Unified Intelligence Center report displays this message.

Step 2 Click OK.
A new browser tab (or window, depending on your browser settings) opens for each certificate that you need to accept. The message in the gadget changes to state that to continue, accept the certificates in the opened tabs.

**Step 3** If you use Internet Explorer:

a) Click **Certificate error** and then click **View Certificates** to open the Certificate dialog box.

b) On the Certificate dialog box, click **Install Certificate** to open the Certificate Import Wizard.

c) On the Certificate Import Wizard, click **Next**.

d) Select **Place all certificates in the following store**, and then click **Browse**.

e) Select **Trusted Root Certification Authorities**, and then click **OK**.

f) Click **Next**.

g) Click **Finish**.

A Security Warning dialog box appears that asks if you want to install the certificate.

h) Click **Yes**.

A Certificate Import dialog box that states the import was successful appears.

i) Click **OK**.

j) Click **OK** on the Certificate dialog box.

k) Close the browser tab. You are asked to accept another certificate. Repeat the preceding steps until all certificates are accepted.

After the browser tabs are closed, the Cisco Unified Intelligence Center Live Data gadget reloads.

**Step 4** If you use Firefox:

a) In each tab, click **I Understand the Risks**, and then click **Add Exception**.

b) Ensure the **Permanently store this exception** check box is checked.

c) Click **Confirm Security Exception**.

After the browser tabs are closed, the Cisco Unified Intelligence Center Live Data gadget reloads.

---

**Sign out of the Finesse desktop**

**Procedure**

**Step 1** Ensure your status is set to Not Ready. Click the status drop-down list and select Not Ready (or Not Ready with the appropriate reason code).

**Step 2** Click **Sign Out**.

A drop-down list appears that contains the Sign Out reason codes.

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

**Step 3** Select the appropriate Sign Out reason code from this list.
**Change your state**

When you sign into the Finesse desktop, your state is set to Not Ready by default. You can then set your state to Ready or choose from one of the configured Not Ready reason codes.

If you are in Ready state, you can set your state to Not Ready. While you are on a call, you can select a state to be applied when the call is complete.

If wrap-up state is enabled for you, when a call ends, you transition to Wrap-Up state. While in Wrap-Up state, you can complete any after call work. To end Wrap-Up state, you must select your new state (Ready or Not Ready) from the drop-down list or wait for the preconfigured timer to expire.

**Procedure**

- **Step 1** Click the drop-down arrow beside your current state.
- **Step 2** Select the appropriate state from the list. Your agent state changes to reflect your choice. If you are on a call and select a state, Finesse shows your current state and the pending state to which you will transition when the call ends.

**Make a call**

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

**Procedure**

- **Step 1** Ensure your status is set to Not Ready (or Not Ready with the appropriate reason code).
- **Step 2** Click **Make a New Call**. The panel expands to reveal the keypad and a list of phone contacts. Your administrator assigns phone contacts to you.
- **Step 3** Choose the contact from the list or enter the number you want to call into the dial pad.
- **Note** Enter text in the search field to search the list of contacts. Select a contact to populate the dial pad with the phone number.
- **Step 4** Click **Call**.
- **Step 5** 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. The call control area expands to show the call variables configured for your system.
You can receive a call from another agent while you are in Not Ready state.

### Procedure

**Step 1**
Click **Answer**.
Your state changes to Talking. You are connected to the caller.

**Step 2**
To end the call, click **End**.
Your state changes to Ready and you are available for the next incoming call.
If you want to be in Not Ready state when the call ends, you can click the drop-down arrow beside your state while you are on the call. You can choose Not Ready or Not Ready with the appropriate reason code. Your state changes to Talking->Not Ready (Pending). When the call ends, your state changes to Not Ready.

---

**Answer an Outbound Option Preview call**

An Outbound Option Preview call allows you to view a customer's contact information before you place the call.

### Procedure

**Step 1**
Ensure your state is set to Ready. You must be in Ready state to receive a call. When an Outbound Option Preview 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. If the attempt succeeds, you are connected to the customer. If the attempt fails, the reservation call disappears and Finesse places you in Ready state.
If you decline the call, 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.

---

**Initiate a consult call**

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

### Procedure

**Step 1**
Click **Consult**.
The call control area expands to reveal the keypad and a list of contacts. The active call is placed on hold.

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

**Step 3** On the keypad, click **Call**.
The customer call is placed on hold. You are connected to the agent or supervisor that you called.

**Step 4** After you consult with the agent or supervisor 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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To end the consult call and retrieve the customer call</td>
<td>Click <strong>End</strong> and then click <strong>Retrieve</strong>.</td>
</tr>
<tr>
<td>To place the other agent or supervisor on hold and go back to the customer</td>
<td>Click <strong>Retrieve</strong>. Click <strong>Retrieve</strong> again to place the customer on hold and go back to the other agent or supervisor.</td>
</tr>
<tr>
<td>To conference the customer into the consult call</td>
<td>Click <strong>Conference</strong>. If you want to leave the conference without ending the call, click <strong>End</strong>.</td>
</tr>
<tr>
<td>To transfer the customer to the agent or supervisor you are consulting with</td>
<td>Click <strong>Transfer</strong>.</td>
</tr>
</tbody>
</table>

**Transfer a call (single-step transfer)**

The single-step transfer feature allows you to transfer a call without first initiating a consult call.

**Note**

You must be in **Talking** state to initiate a transfer. If you put the call on hold, the Direct Transfer button disappears.

**Procedure**

**Step 1** Click **Direct Transfer**.
The call control area expands to reveal the keypad and a list of contacts.

**Note** Your administrator assigns your phone contacts.

**Step 2** Choose a contact from the list or enter the number you want to call into the dial pad.

**Note** Enter text in the search field to search the list of contacts. Select a contact to populate the dial pad with the phone number.

**Step 3** On the dial pad, click the **Transfer** button.
The call disappears from your desktop. You are now ready for the next call.
Send DTMF

Use the Send DTMF 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.

Note

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

Procedure

**Step 1** Click the Keypad button.
The call control area expands to reveal the keypad.

**Step 2** Click the appropriate buttons on the keypad to enter the DTMF digits.
You can send the following characters as part of a DTMF string:

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

Note

You must use the keypad to enter the digits. You cannot use your keyboard.
The corresponding characters appear in the text field above the keypad (this text field is read-only).

**Step 3** Click the Keypad button again to close the keypad.

Apply wrap-up reason

Wrap-up reasons represent reasons that you can apply to calls. The Wrap-Up Reason button appears when you are on a call.

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

You cannot enter a wrap-up reason after you transfer a call. If you want to enter a wrap-up reason for a call you transfer, you must select the wrap-up reason while the call is in progress.
Procedure

Step 1  Click Wrap-Up Reason.
Step 2  Select the appropriate wrap-up reason from the drop-down list.
Step 3  Click Apply.

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

This chapter describes the tasks that supervisors perform.

- View team performance, page 19
- Change state of agent, page 19
- Monitor a call, page 20
- Barge in to a call, page 20
- Intercept a call, page 21

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, click the Select team drop-down list and choose the team that you want to view.

A list of agents for the specified team, their current state, time in state, and extensions appears. You can click the headers of the columns to sort by agent name, state, time in state, or extension.

**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 drop-down list and choose a new team.

Change state of agent

You can use the Team Performance gadget to force an agent into Ready state or to sign out an agent.
Monitor a call

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

Procedure

Step 1 From the Team Performance drop-down list, choose the team to which the agents you want to monitor belong.

Step 2 Select the agent that you want to monitor. The agent you select must be in Talking state.

The Start Monitoring button becomes active.

Step 3 Click Start Monitoring. The Start Monitoring button changes to Monitoring Agent. The silent monitor call appears in the call control area of your desktop. The Hold, Barge In, and End buttons are active. You can click Hold to place the call on hold and then click Retrieve to retrieve it. You can click Barge In to barge into the call.

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

Barge in to 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.
Procedure

**Step 1**  From the Team Performance list, select an agent who is in Talking state to monitor.

**Step 2**  Click **Start Monitoring**.
The Start Monitoring button changes to Monitoring Agent. The silent monitor call appears in the call control area of your desktop. The Barge In button appears.

**Step 3**  Click **Barge In**.
The call becomes a conference call between you, the agent, and the caller.

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**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 use this feature to drop a participant from any conference call in which you are a participant.

**Procedure**

**Step 1**  Click the **Drop** drop-down list.

**Step 2**  Click the agent who you want to drop from the list of participants.

**Note**  You can only drop an agent from the call. You cannot drop a CTI Route Point, IVR Port, or a caller.
The selected agent is dropped from the call.
Supervisor tasks

Intercept a call
Troubleshooting

This chapter provides troubleshooting information for the Cisco Finesse desktop.

- Send error report, page 23

Send error report

If you experience problems with the Finesse desktop, you can send a set of desktop logs to your administrator.

Procedure

To send desktop logs to the administrator, click **Send Error Report**.

The Send Error Report link always appears below the last gadget on your desktop.

The Send Error Report link disappears briefly and reappears after the Finesse desktop submits the desktop logs.

**Note**  If your browser freezes or crashes before you can click the Send Error Report link and you need to restart your browser, do not click the Send Error Report link right away. Wait until the desktop starts to exhibit the problem again and then click the link.