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Contents

Sign In Using IPv6 17
Account Locked After Five Failed Sign In Attempts 17
Sign In as Mobile Agent 17
Accept Security Certificates 18
Accept Certificates for Live Data Gadget 20
Sign Out of the Finesse Desktop 22
Change Your State 22
Make a Call 23
Answer a Call 24
Answer an Outbound Option Preview Call 25
Answer a Direct Preview Outbound Call 25
Reclassify a Direct Preview Outbound Call 26
Schedule a Callback 26
Answer an Outbound Option Personal Callback Call 27
Initiate a Consult Call 27
Transfer a Call (Single-Step Transfer) 28
Send DTMF 29
Apply Wrap-Up Reason 29
View Multiple Live Data Report Views 30
View Context Service Data 31

Chapter 3  Supervisor Tasks 33
View Team Performance 33
Change State of Agent 33
Monitor a Call 34
Barge In on a Call 35
Intercept a Call 35

Chapter 4  Finesse IP Phone Agent Tasks 37
Finesse IP Phone Agent 37
Sign In to Finesse on the IP Phone 38
Change State on the IP Phone 39
Apply Wrap Up Reason on the IP Phone 39
Sign Out of Finesse on the IP Phone 40
CHAPTER 5  Troubleshooting  45
   Send Error Report  45
Preface

• Change History, on page vii
• About This Guide, on page viii
• Audience, on page viii
• Related Documents, on page ix
• Obtaining Documentation and Submitting a Service Request, on page ix
• Field Alerts and Field Notices, on page ix
• Documentation Feedback, on page ix
• Conventions, on page ix

Change History

The following table lists changes made to this guide. Most recent changes appear at the top.
### Change

<table>
<thead>
<tr>
<th>Change</th>
<th>See</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non Single Sign-On users can now log in with a different user name.</td>
<td>Sign In to Finesse Desktop Hybrid Mode, on page 16</td>
<td></td>
</tr>
<tr>
<td>Chrome support has now been added for accepting certificates for Live Data Gadget.</td>
<td>Accept Certificates for Live Data Gadget, on page 20</td>
<td></td>
</tr>
<tr>
<td>Desktop notifications for incoming calls is now added.</td>
<td>Sign In to Finesse Desktop, on page 15</td>
<td></td>
</tr>
<tr>
<td>Change in behavior when signing out of Agent Desktop and logging in again due to Single Sign-On and Hybrid modes.</td>
<td>Sign Out of the Finesse Desktop, on page 22</td>
<td></td>
</tr>
<tr>
<td>Single Sign-On and Hybrid modes to sign into the Finesse Desktop is now supported.</td>
<td>Sign In to Finesse Desktop, on page 15</td>
<td></td>
</tr>
<tr>
<td>While making a call, the option to remove special characters from phone numbers is now added.</td>
<td>Make a Call, on page 23</td>
<td></td>
</tr>
<tr>
<td>The Browser Behavior topic has now been moved to Browser Settings for Firefox.</td>
<td>Browser Settings for Firefox, on page 14</td>
<td></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.
Related Documents

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

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, using the Cisco Bug Search Tool (BST), submitting a service request, and gathering additional information, see What's New in Cisco Product Documentation.

To receive new and revised Cisco technical content directly to your desktop, you can subscribe to the RSS feeds are a free service.

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Sign in www.cisco.com and then access the tool at https://www.cisco.com/cisco/support/notifications.html.

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Conventions

This document uses the following conventions:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
</table>
| boldface font | Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example:  
• Choose Edit > Find.  
• Click Finish. |
<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>italic 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>• A syntax value that the user must replace. Example: IF <em>(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>window 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: &lt;html&gt;&lt;title&gt;Cisco Systems, Inc. &lt;/title&gt;&lt;/html&gt;</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Angle brackets are used to indicate the following:</td>
</tr>
<tr>
<td></td>
<td>• For arguments where the context does not allow italic, such as ASCII output.</td>
</tr>
<tr>
<td></td>
<td>• A character string that the user enters but that does not appear on the window such as a password.</td>
</tr>
</tbody>
</table>
Cisco Finesse Desktop Interface

When you sign into 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.

Note

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, on page 1
• Finesse Supervisor Desktop, on page 4
• State and Call Timers, on page 5
• Fineses Desktop Behavior, on page 6
• Finesse Desktop Failover, on page 7
• One Finesse Desktop or Finesse IPPA Session Per Agent, on page 8
• Multiline Support, on page 8
• Accessibility, on page 9

Finesse Agent Desktop

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

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, Retrieve, and End 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.
- Desktop call notifications: For incoming calls subject to active browser notification service.
- 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 length of time in Ready or Not Ready state. The call timer indicates total call time, hold time, and wrap-up time.
- Single-step transfer: Transfer a call without the need to first initiate a consultation call.
- Preview Outbound calls: Preview the customer information for the call before you choose to accept, reject, or close the contact.
- 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 reason codes: Code to indicate why you are changing your status to Not Ready or Sign out (your administrator defines these codes).
- Wrap-Up Reason Codes: Wrap-Up Reason Code for each call (your administrator defines the Wrap-Up Reason codes).
- 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).
- 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.

The functionality available to you depends on what your administrator has configured. For example, if your administrator did not define Wrap-Up Reason Codes, you cannot choose a Wrap-Up Reason code.

---

**Note**

As Unified CCE uses ASCII encoding (8-bits), while Finesse uses UTF-8 encoding (32-bits), the First Name field in the call control area is truncated to only 16 characters.
To ensure that all features of the Finesse agent desktop work properly, you must disable pop-up blockers.

Finesse Queue Statistics Gadget

The Finesse agent desktop also provides a Queue Statistics gadget. The Queue Statistics gadget displays information about the queues to which you are assigned. You can click the column headers to sort information in ascending or descending order. The Queue Statistics gadget provides information about the following:

- **Queue Name**: The name of the queue.
- **# Calls**: The number of calls waiting in the queue.
- **Max Time**: The length of time the oldest call has been in the queue.
- **Ready**: The number of agents assigned to the queue who are in Ready state.
- **Not Ready**: The number of agents assigned to the queue who are in Not Ready state.
- **Active**
  - **In**: The number of agents assigned to the queue who are on inbound calls.
  - **Out**: The number of agents assigned to the queue who are on outbound calls.
  - **Other**: The number of agents assigned to the queue who are on internal consult calls.
- **Wrap Up**
  - **Ready (Pending)**: The number of agents assigned to the queue who will transition to Ready state when wrap-up ends.
  - **Not Ready (Pending)**: The number of agents assigned to the queue who will transition to Not Ready state when wrap-up ends.

For additional information about how the Queue Statistics gadget collects and displays statistics, see the gadget description provided in the *Finesse Supervisor Desktop* section.

The Queue Statistics gadget is disabled by default as part of Finesse 11.5(1) new installation. Enabling queue statistics polling will affect the performance in large deployments, where Task Routing APIs are in use.

When performing a system upgrade to Finesse 11.5(1), during switch version, queue statistics polling will be disabled by default and the queue statistics gadget will be commented out in all team layout XML files.

If you wish to retain the queue statistics gadget as enabled post upgrade, perform the following steps:

1. Run the **`utils finesse queue_statistics admin`** CLI command.
2. Run the **`utils service restart Cisco Finesse Tomcat`** CLI command.
3. Enable the queue statistics gadget in the team desktop layout XML files.
The Finesse Supervisor Desktop provides call control functionality and the following:

- Team Performance gadget
- Queue Statistics gadget

**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. 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 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.

The Team Performance gadget also provides the following functionality:

- Silent monitoring: Silently monitor an agent call.
- Force state change: Force an agent into Ready or Not Ready state or sign out an agent.

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.
Finesse Queue Statistics Gadget

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
• Max Time: The length of time the oldest call has been in the queue
• Ready: The number of agents assigned to the queue who are in Ready state
• Not Ready: The number of agents assigned to the queue who are in Not Ready state
• Active
  • In: The number of agents assigned to the queue who are on inbound calls
  • Out: The number of agents assigned to the queue who are on outbound calls
  • Other: The number of agents assigned to the queue who are on internal consult calls
• Wrap Up
  • Ready (Pending): The number of agents assigned to the queue who will transition to Ready state when wrap-up ends.
  • Not Ready (Pending): The number of agents assigned to the queue who will transition to Not Ready state when wrap-up ends.

The following notes provide additional information about how the Queue Statistics gadget collects and displays statistics:

• Finesse does not compute the queue statistics, but instead receives the queue statistics from Unified CCE.
• Finesse does not display the queue statistics for the default queue (default skill group on Unified CCE).
• The Active Out statistic includes agents talking on outbound calls placed by those agents. It also includes non-routed calls placed to external devices that are not monitored by Unified CM and to devices in a different Unified CM cluster. It does not include agents on Outbound Option calls.
• If an agent places a direct call to another agent's extension, Unified CCE increments the Active Out statistic for the default queue (skill group). However, because Finesse does not display the queue statistics for the default queue, the Active Out statistics do not change for any of the Finesse queues to which the agent is assigned.

State and Call Timers

The Finesse desktop provides agent state and call timers.

The agent state timer appears next to the agent state drop-down list when you are in Not Ready or Ready state and updates every second. The format for this timer is mm:ss. If you are in the 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 from Not Ready with a reason code to Not Ready with a new reason code), the timer resets to 00:00.

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.

![Total Call Time](image)

- **Hold Time**: Indicates the amount of time that the call has been on hold. When you place a call on hold, this timer shows the hold time, followed by the total call time in parentheses.

![Hold Time](image)

- **Wrap-Up Time**: Indicates the amount of time that you have been in wrap-up state. If wrap-up is enabled for you, you transition to wrap-up state when you end the call.

![Wrap-Up Time](image)

If the call exceeds 1 hour, the timer still displays in minutes and seconds. For example, at 1 hour and 15 seconds, the timer displays 60:15.

---

**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 “--:--”

---

**Finesse Desktop Behavior**

If the Finesse desktop is not the active window and one of the following happens, then the Finesse desktop either becomes the active window or flashes in the taskbar.

- You receive an incoming call on the desktop.
- You are signed out due to failover or inactivity.
- Your Supervisor signs you out.

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

---

**Note**

If you are using Firefox, configure the browser. See *Browser Settings for Firefox* section in this guide.

---

**Note**

This behavior is for voice contacts (calls) only and not applicable for chat or email contacts.
**Toaster Notification**

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

---

**Note**

Internet Explorer does not support toaster notification.

---

**Finess Desktop Failover**

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

The Finess desktop checks for the following:

- Whether the current Finess server recovers its state
- Whether the alternate Finess server is available

If the current Finess server recovers, the desktop is reconnected. A banner appears that notifies you that you have successfully reconnected. If the current Finess 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, Finess attempts to preserve that state. When Finess 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 Finess Desktop.....

If you are unable to accept the security certificates and see a request to accept the certificates again, close the pop-up and continue to sign in.
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. After the wrap-up timer expires, your state is determined by Unified Communications Manager and may depend on the type of failover that occurred.

- If you were put in Not Ready state (either by your supervisor or by the system (for example, Ring No Answer), your selection of Ready is not preserved.

- If you are configured in the system to automatically go in to Wrap-Up state after each call and are on a call that ends while the desktop is still unavailable, your selection of Ready may not be preserved. This is to ensure that you have time to complete your wrap-up session after Finesse recovers from the failover. This also applies if you selected a pending state of Ready as the pending state only applies after wrap-up is complete.

- 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 Finesse Desktop or Finesse IPPA Session Per Agent**

Finesse has the following agent session behavior:

- Finesse does not support agents signing in to both Finesse desktop and Finesse IPPA at the same time. Agents should sign in to only one instance of either the Finesse desktop or Finesse IP Phone Agent (IPPA) at one time.

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

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

---

**Multiline Support**

If multiline is configured on Unified Contact Center Enterprise, you can have one or more secondary lines on your phone. However, Finesse does not publish any information about secondary lines to the Finesse desktop. Therefore, the desktop does not display any information about calls on your secondary line.
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
Finesse supports these features only with Internet Explorer 11.0 and only on the agent desktop, not the supervisor desktop.

<table>
<thead>
<tr>
<th>Desktop Element</th>
<th>To Perform the Following Actions</th>
<th>Use the Following Keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Bar</td>
<td>Move between the address bar and the frames (in Internet Explorer only)</td>
<td>F6</td>
</tr>
<tr>
<td>Sign-in Page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language Selector Drop-Down</td>
<td>Access the drop-down</td>
<td>Tab and Shift-Tab from the ID field</td>
</tr>
<tr>
<td></td>
<td>Open the drop-down</td>
<td>Alt-Down Arrow or Enter</td>
</tr>
<tr>
<td></td>
<td>Scroll the drop-down</td>
<td>Up and Down Arrows</td>
</tr>
<tr>
<td></td>
<td>Select a language</td>
<td>Enter</td>
</tr>
<tr>
<td></td>
<td>Hide the drop-down</td>
<td>Esc</td>
</tr>
<tr>
<td>Mobile Agent Help Tooltips</td>
<td>Access and display a tooltip</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td></td>
<td>Hide a tooltip</td>
<td>Esc</td>
</tr>
<tr>
<td>Call Control Gadget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Call Control Gadget Navigation</td>
<td>Access the call control gadget, phone book, and keypad</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td></td>
<td>Open and close the call control gadget</td>
<td>Enter</td>
</tr>
<tr>
<td>Phone book</td>
<td>Navigate the phone book contact entries</td>
<td>Arrow keys</td>
</tr>
<tr>
<td>Keypad</td>
<td>Navigate the keypad number buttons</td>
<td>Tab</td>
</tr>
<tr>
<td></td>
<td>Make a new call</td>
<td>• Press Enter in the number display field OR • Navigate to the Call button and press Enter</td>
</tr>
<tr>
<td>Desktop Element</td>
<td>To Perform the Following Actions</td>
<td>Use the Following Keys</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>--------------------------------------------------</td>
<td>------------------------------------------------</td>
</tr>
<tr>
<td>Wrap-Up Reason Drop-Down</td>
<td>Access the drop-down</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td></td>
<td>Open the drop-down</td>
<td>Alt-Down arrow</td>
</tr>
<tr>
<td></td>
<td>Scroll the list of wrap-up reasons</td>
<td>Up and Down Arrows</td>
</tr>
<tr>
<td></td>
<td>Select a wrap-up reason</td>
<td>Enter</td>
</tr>
<tr>
<td></td>
<td>Close the drop-down</td>
<td>Esc</td>
</tr>
<tr>
<td>Callback Dialog Box and Reclassify Dialog Box (Outbound Calls)</td>
<td>Access the Callback and Reclassify buttons</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td></td>
<td>Open the Callback and Reclassify dialog boxes</td>
<td>Enter (on the respective buttons)</td>
</tr>
<tr>
<td></td>
<td>Close dialog boxes</td>
<td>• Press Esc</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Navigate away from the dialog boxes using Tab or Shift-Tab</td>
</tr>
<tr>
<td>Reclassify Dialog Box</td>
<td>Navigate the elements</td>
<td>Tab, Shift-Tab, Up and Down Arrows</td>
</tr>
<tr>
<td></td>
<td>Select an option</td>
<td>Enter</td>
</tr>
<tr>
<td></td>
<td>Close the Reclassify dialog box</td>
<td>Esc</td>
</tr>
<tr>
<td>Callback Date and Time Calendar</td>
<td>Navigate to and from the Calendar</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td></td>
<td>Navigate within the Calendar</td>
<td>Arrows</td>
</tr>
<tr>
<td></td>
<td>Select a Calendar date</td>
<td>Enter</td>
</tr>
<tr>
<td></td>
<td>Move to the first or last days of a month</td>
<td>Home and End</td>
</tr>
<tr>
<td></td>
<td>Close the pop-up</td>
<td>Esc</td>
</tr>
<tr>
<td>Callback Date and Time Controls</td>
<td>Navigate the elements</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td></td>
<td>Increase and decrease the Hour and Minute values</td>
<td>Up and Down Arrows</td>
</tr>
<tr>
<td></td>
<td>Toggle the AM/PM button</td>
<td>Enter</td>
</tr>
<tr>
<td></td>
<td>Close the pop-up</td>
<td>Esc</td>
</tr>
<tr>
<td>Desktop</td>
<td>Access and display a tooltip</td>
<td>Tab and Shift-Tab</td>
</tr>
<tr>
<td>Send Error Report Tooltip</td>
<td>Hide a tooltip</td>
<td>Esc</td>
</tr>
</tbody>
</table>
### Screen Reader Support

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

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

- Browser Settings for Internet Explorer, on page 13
- Browser Settings for Firefox, on page 14
- Sign In to Finesse Desktop, on page 15
- Sign In as Mobile Agent, on page 17
- Accept Security Certificates, on page 18
- Accept Certificates for Live Data Gadget, on page 20
- Sign Out of the Finesse Desktop, on page 22
- Change Your State, on page 22
- Make a Call, on page 23
- Answer a Call, on page 24
- Answer an Outbound Option Preview Call, on page 25
- Answer a Direct Preview Outbound Call, on page 25
- Reclassify a Direct Preview Outbound Call, on page 26
- Schedule a Callback, on page 26
- Answer an Outbound Option Personal Callback Call, on page 27
- Initiate a Consult Call, on page 27
- Transfer a Call (Single-Step Transfer), on page 28
- Send DTMF, on page 29
- Apply Wrap-Up Reason, on page 29
- View Multiple Live Data Report Views, on page 30
- View Context Service Data, on page 31

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.

1. Disable pop-up blockers.

2. 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.

3. 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.

Note
If the customer is using self-signed CA (Certificate Authority) and their agents use the server's FQDN, there should not be any certificate errors or warnings when connecting to Finesse over HTTPS.

Browser Settings for Firefox

Complete the following steps to ensure Finesse behaves as expected when it is not the active window.

Procedure

Step 1
Open Firefox and enter `about:config` in the address bar.
A warning page appears that states, `This might void your warranty!`.

Step 2
Click `I'll be careful, I promise!`.

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`.
**Sign In to Finesse Desktop**

**Procedure**

**Step 1**
Enter the following URL in the address bar of your browser:

http://FQDN of Finesse Server/desktop/

where *FQDN of Finesse Server* is the fully qualified domain name of the Finesse server.

**Step 2**
If your contact center has installed a language pack for Finesse, a language selector appears on the desktop. From the language selector drop-down list, select the language that you want to appear on the desktop.

*Note* You can also select a language by passing the locale as part of the URL (for example, http://FQDN of Finesse server/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 Finesse, the desktop locale is English only.

**Step 3**
In the **ID** field, enter your agent ID or username.

*Note* Finesse agent usernames are restricted to 7-bit printable ASCII characters (any of the 94 characters with the numeric values from 33 to 126). They do not support double quotes ("").

**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**.

You are signed in to the Finesse desktop. Your role (agent or supervisor), agent name, agent ID, and extension appear in the header. Your status is set to Not Ready.

*Note* On first login, you are prompted to set your preference for notifications. Choose the option to always receive or allow toaster notifications. Note that toaster notifications will not appear if your browser is set to private mode i.e New incognito window in Chrome or New private window in Firefox.

---

**Sign In to Finesse Desktop Single Sign-On Mode**

**Procedure**

**Step 1**
Enter the following URL in the address bar of your browser:

http://FQDN of Finesse Server/desktop/
where *FQDN of Finesse Server* is the fully qualified domain name of the Finesse server.

**Step 2** If your contact center has installed a language pack for Finesse, a language selector appears on the desktop. From the language selector drop-down list, select the language that you want to appear on the desktop.

*Note* You can also select a language by passing the locale as part of the URL (for example, `http://FQDN of Finesse server/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 Finesse, the desktop locale is English only.

**Step 3** On the login page, enter your **Username**.

**Step 4** In the **Password** field, enter your password and click **Sign-In**.

**Step 5** The Finesse landing page is displayed. In the **Extension** field, enter the extension of your phone.

**Step 6** Click **Submit**.

You are signed into the Finesse desktop. Your role (agent or supervisor), agent name, agent ID, and extension appear in the header. Your status is set to Not Ready.

*Note* On first login, you are prompted to set your preference for notifications. Choose the option to always receive or allow toaster notifications. Note that toaster notifications will not appear if your browser is set to private mode i.e **New incognito window** in Chrome or **New private window** in Firefox.

---

# Sign In to Finesse Desktop Hybrid Mode

**Procedure**

**Step 1** Enter the following URL in the address bar of your browser:

`http://FQDN of Finesse Server/desktop/`

where *FQDN of Finesse Server* is the fully qualified domain name of the Finesse server.

**Step 2** On the login page, enter your **Username**.

**Step 3** If your contact center has installed a language pack for Finesse, a language selector appears on the desktop. From the language selector drop-down list, select the language that you want to appear on the desktop.

*Note* You can also select a language by passing the locale as part of the URL (for example, `http://FQDN of Finesse server/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 Finesse, the desktop locale is English only.

**Step 4** Click **Submit**.

**Step 5** If the agent is in SSO Mode, the login page is displayed. In the **Username** field, enter your username.

If the agent is in Non SSO Mode, refer to the section *Sign In to Finesse Desktop steps 4 to step 6*. 
Step 6 In the **Password** field, enter your password. Click **Sign-In**.

Step 7 The Finesses landing page is displayed. In the **Extension** field, enter the extension of your phone.

Step 8 Click **Submit**.

You are signed in to the Finesses desktop. Your role (agent or supervisor), agent name, agent ID, and extension appear in the header. Your status is set to Not Ready.

*Note* Non SSO users in Hybrid Mode can log in with a different username by clicking the **Sign in as a different user** link. This will direct you to the login page for entering your credentials.

*Note* On first login, you are prompted to set your preference for notifications. Choose the option to always receive or allow toaster notifications. Note that toaster notifications will not appear if your browser is set to private mode i.e **New incognito window** in Chrome or **New private window** in Firefox.

---

**Sign In Using IPv6**

If directed by your administrator, you can sign in to Finesses using an IPv6-only client. In this case, include the appropriate HTTP or HTTPS port in the sign-in URL in Step 1 of the preceding procedure.

- For secure access using HTTPS, enter:
  ```
  https://<FQDN>:8445/desktop
  ```
- For HTTP access, enter:
  ```
  http://<FQDN>:8082/desktop
  ```

The remaining steps of the sign-in procedure remain the same for IPv6.

**Account Locked After Five Failed Sign In Attempts**

If you try to sign in to Finesses with the wrong password five times in a row, Finesses blocks access to your account for 5 minutes. For security reasons, if you try to sign in again during that time, Finesses does not alert you that your account is locked. You must wait 5 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 5 minutes.

This restriction applies regardless of how you sign in, be it on the desktop, as a mobile agent, or using the Finesses IP Phone Agent (IPPA).

**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 *Cisco Unified Contact Center Enterprise Features Guide*. 
Procedure

Step 1 Enter the following URL in the address bar of your browser: http://FQDN of Finesse Server/, where FQDN is the fully-qualified domain name 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
- The mode used (Call by Call or Nailed Connection)
- The dial number you provided

When you select the Sign in as a Mobile Agent check box and choose a mode (Call by Call or Nailed Connection), Finesse stores a cookie in your browser that allows the browser to remember these selections. When you access the sign-in page again, the Sign in as a Mobile Agent check box and Mode are already selected. These selections persist across sign-ins, browser restarts, and failover scenarios.

However, if you access the alternate Finesse server directly and you have not signed in to this server as a mobile agent before, you must make these selections again.

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.
If you are using a Windows client, signed in as a Windows user, and using Internet Explorer, you must run Internet Explorer as an administrator to install these 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.

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.

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.

   If you are using Internet Explorer 11 with Windows 8.1, the Install Certificate option does not appear until you add Finesse to your trusted sites.

1. From the browser menu, select **Internet Options**.

2. On the **Security** tab, click **Trusted Sites**, and then click **Sites**.

3. In the **Add this website to the zone** field, enter the URL for the Finesse desktop and click **Add**.

4. After you click **Install Certificate**, under **Store Location**, select **Current User** to install the certificate for the current user only, or select **Local Machine** to install the certificate for all Windows users who use this computer.

   If you select **Local Machine**, a dialog box appears that asks if you want to allow Windows host process to make changes to this computer. Select **Yes**.

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.
   
   If you are using Internet Explorer 11 with Windows 8.1, the Install Certificate option does not appear until you add Finesse to your trusted sites.
   
   1. From the browser menu, select **Internet Options**.
   2. On the **Security** tab, click **Trusted Sites**, and then click **Sites**.
   3. In the **Add this website to the zone** field, enter the URL for the Finesse desktop and click **Add**.
   4. After you click **Install Certificate**, under **Store Location**, select **Current User** to install the certificate for the current user only, or select **Local Machine** to install the certificate for all Windows users who use this computer.

   If you select **Local Machine**, a dialog box appears that asks if you want to allow Windows host process to make changes to this computer. Select **Yes**.

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

**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 closed and an additional 60 seconds to sign you out. Finesse may continue to route contacts to you during this time.

Sign out of the desktop as described in the following procedure.

**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 code.

**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.

**Step 4**

On the sign out confirmation screen, you can choose to exit the browser or be redirected to the Finesse Desktop by clicking the **Click here** link. This will take you to any one of the following sign out scenarios:

- The Finesse Landing page. To log in to the Finesse Desktop again, enter your **Username**, **Password** and **Extension**.

- The Finesse Landing page. To log in to the Finesse Desktop again, enter your **Extension**.

- The Log In page. To log in to the Finesse Desktop again, enter your **Password** and **Extension**.

---

Change Your State

When you sign in to 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 is required for you, 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 for you, you can select Wrap-Up while on a call to transition to Wrap-Up state when the call ends.
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.

**Note**
Finesse now supports the use of any ASCII character when you make a call. Finesse no longer converts letters typed into the dial pad into numbers, nor does it remove non-numeric characters (including parentheses and hyphens) from phone numbers.

To remove special characters from the phone numbers, check the **Remove non-numeric characters** check box before making a 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**.
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.

**Note**
Depending on how your administrator has configured the system, you might see different call variables layouts for different calls.

**Note**
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.

**Step 5**
To end the call, click **End**.
**Answer an Outbound Option Preview Call**

An Outbound Option Preview 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 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.

---

**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 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 remains for the life of the call. This also available 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). The Phone Number field contains the phone number that was dialed for this call.
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 field, enter the date and time to call the customer. You can type the date and time in to the field or click the calendar icon to choose the date and time.
        You must enter the time in the customer's location (not the time in your location).
        To toggle between AM and PM, click the AM or PM button.
        **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**.
        A pop-up appears that confirms the callback has been scheduled.
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 then click **Update**.

A dialog appears that confirms the callback has been updated.

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 pop-up appears that confirms the callback has been canceled.

---

**Answer an Outbound Option Personal Callback Call**

When you are on an Outbound Option call, you can schedule a callback to call the customer back at a more convenient time. Scheduled callbacks can be personal callbacks or regular callbacks, depending on the configuration of your contact center. Regular callbacks appear on your desktop in the same Outbound Option mode as the original call (for example, if the original call was a Preview call, the callback call is a Preview call).

Personal callbacks are similar to Outbound Option Preview calls but the buttons on the desktop are slightly different.

**Procedure**

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

When an Outbound Option Personal Callback 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**, and then click **Close**.

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, 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.
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 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.

<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> on the consult call and then click <strong>Retrieve</strong> on the customer call</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> on the customer call.</td>
</tr>
<tr>
<td></td>
<td>Click <strong>Retrieve</strong> on the consult call 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, 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
- pound sign (#)
- asterisk (*)

**Note**

You must use the keypad to enter the digits. You cannot type the digits using 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. 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.

You can enter a wrap-up reason during a call or while you are in Wrap-Up state after the call ends. If wrap-up is required for you, you automatically transition to Wrap-Up state when the call ends. If wrap-up is optional for you, you can select Wrap-Up from the agent state drop-down list 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 list before you select Wrap-Up. For example, while on a call, select Not Ready from the drop-down list. Then select Wrap-Up. When the call ends, you enter Wrap-Up state with a pending state of Not Ready. When the wrap-up timer expires, you enter Not Ready state.

**Note**
Unified CCX and Cisco Agent Desktop allow agents to choose if they want to go into Wrap-Up or Work state on a call-by-call basis. With Cisco Finesse Desktop, agents don’t have this option; Wrap-Up state is either required or not allowed.

To end Wrap-Up state, you can 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 **Wrap-Up Reason**.

**Step 2** Select the appropriate wrap-up reason from the drop-down list.

**Step 3** Click **Apply**.

A green check mark appears next to the Apply button to indicate that Finesse successfully applied the wrap-up reason.

**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**.

You cannot apply a wrap-up reason to an incoming call before you answer the call (or to an outbound call before you are connected to the other party). The Wrap-Up Reason button is disabled until the call is answered.

---

**View Multiple Live Data Report Views**

Cisco Unified Intelligence Center 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.
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 Context Service Data**

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

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

**Procedure**

**Step 1**
To view the Context Service gadget, click the **Manage Customer** tab.

**Step 2**
For information about how to use the Context Service, see the instructions provided in the gadget itself.
View Context Service Data
Supervisor Tasks

This chapter describes the tasks that supervisors perform.

- View Team Performance, on page 33
- Change State of Agent, on page 33
- Monitor a Call, on page 34
- Barge In on a Call, on page 35
- Intercept a Call, on page 35

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 that is selected by default in the drop down.

A list of agents for the selected team, their current state, time in state, and extension 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 change the state of an agent to Ready, Not Ready or Sign Out.
Procedure

Step 1  In the Team Performance gadget, select the agent whose state you want to change.

Step 2  To force the agent into Ready state, click Ready. To force the agent into Not Ready state, click Not Ready. To sign the agent out, click Sign Out.

In the Actions tab, the Ready or 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 who is reserved for a call (in Reserved or Reserved (Outbound) state), on an active call (in Talking state), or has a call on hold (in Hold state), that agent is immediately logged 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 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 is enabled.

Step 3  Click Start Monitoring.
The Start Monitoring button changes to Monitoring Agent. The silent monitor call appears in the call control area of the desktop. The Hold, Barge In, and End buttons are enabled. 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 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.

**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.

---

**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.
Finesse IP Phone Agent Tasks

- Finesse IP Phone Agent, on page 37
- Sign In to Finesse on the IP Phone, on page 38
- Change State on the IP Phone, on page 39
- Apply Wrap Up Reason on the IP Phone, on page 39
- Sign Out of Finesse on the IP Phone, on page 40
- Recover Finesse IP Phone Agent Service After Failure, on page 41
- Set Finesse Service and Credentials Using the Self Care Portal, on page 41
- Finesse IPPA Behavior, on page 42

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 than 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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign In</td>
<td>• Press Services &gt; Cisco Finesse.</td>
</tr>
<tr>
<td></td>
<td>• Enter your ID, password, and extension.</td>
</tr>
<tr>
<td></td>
<td>• Press SignIn.</td>
</tr>
</tbody>
</table>
### 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.

![IP Phone Services Button](image)

**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, password, and extension, and press the SignIn button.
You must enter your agent ID in the ID field. Unlike the Finesse desktop, Finesse IPPA does not support username for sign in.

The home screen appears.

---

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. Alternatively, Finesse IPPA can automatically enter only some of your information, for example your ID and extension. In this case, you must enter only your password before you press the **SignIn** button.

---

**Change State on the IP Phone**

When you sign into 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 will apply when the call ends.

**Procedure**

1. **Step 1** To set your state to Ready, press the **Ready** button.
2. **Step 2** To set your state to Not Ready, press the **NotReady** button.
3. **Step 3** If Not Ready reason codes appear, scroll to the desired reason, and press the **Select** button.

   To change your selected reason code, press the **NotReady** button again and select 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 alongside 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 administartor has not configured Wrap Up reasons for you, then the WrapUp button is not displayed for you.

Your administrator can set Wrap Up as a required or optional step. If Wrap Up is required, you move to the Wrap Up state automatically after the call ends to complete any after call work. If Wrap Up is optional, press WrapUp during the call to move to the Wrap Up state after the call ends.

**Procedure**

**Step 1**
If Wrap Up is required, press WrapUp during or after the call and select a Wrap Up reason from the list.

**Step 2**
If Wrap Up is optional, press WrapUp during the call, and do one of the following:

- Select **Wrap Up After Call**, and select a Wrap Up reason after the call ends.
- Select **Apply Wrap Up Reason**, and select a Wrap Up reason during the call.

**Step 3**
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.
Recover Finesse IP Phone Agent Service After Failure

If the Finesseserver you are currently signed in to goes out of service, the IP Phone displays an error indicating the Finesseservice is unavailable. Unlike the Finessedeskto, the Finesseservice does not automatically failover to the alternate Finesseserver. 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 Finesseservice.

**Step 2**
If the issue is not resolved, sign into an alternate Finesseservice:

a) Press **Exit** to exit the current Finesseservice.

b) Press the **Services** button.

c) Select an alternate **Cisco Finesse** service from the menu.

d) Enter your agent ID, password, and extension, and press the **SignIn** button.

**Note**

- If none of the available Finesseservices allow you to connect, contact your administrator.

- If your IP Phone displays pending state information when you lose connection with the Finesseservice, that state information is lost when you sign in again.

Set Finesseservice and Credentials Using the Self Care Portal

Your administrator may ask you to subscribe your phone to the Finesseservice using the Unified CM Self Care Portal. And 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 into 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 Finesseservice.
**Finesse IPPA Behavior**

The following additional 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.

**Phone Behavior When You Make a Call**

- If you make a call without first navigating to the home phone screen, sometimes the IP Phone changes the display to the Finesse screen. 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 moved to reserved or on hold.

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.

Note

As 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.

Note

Finesse IPPA is not supported on VPN.
Troubleshooting

This chapter provides troubleshooting information for the Cisco Finesse desktop.

- **Send Error Report**, on page 45

## 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 and the following message appears:

Logs successfully sent.

The Send Error Report link reappears after the Finesse desktop submits the 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. After a browser restart, the logs are no longer available. You must wait until the desktop starts to exhibit the problem again and then click the link.