



Manage Workflows

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Workflows and Workflow Actions

You can use workflows to automate common repetitive agent tasks. A workflow has a unique name and a helpful description. Use the Manage Workflows and Manage Workflow Actions gadgets to view, add, edit, or delete workflows and workflow actions.

All workflows are team-level workflows. You cannot create a global workflow. If you need a global workflow, create a team workflow and assign it to all teams.

Cisco Finesse supports the following number of workflows and workflow actions:

- 100 workflows per Cisco Finesse system
- 100 actions per Cisco Finesse system
- 20 workflows per team
- Five conditions per workflow
- Five actions per workflow
- Five variables per action

The following fields can be used to configure workflows:

- queueNumber
- queueName
- callKeyCallId

- callKeyPrefix
- callKeySequenceNum
- wrapUpReason
- For Voice - Call variables, Outbound Option variables, queue details, wrap-up reasons, agent details, or team details.
- For Email - Queue name and email attributes like From, To, Cc, Bcc, or Subject.
- For Chat - Queue name, chat type, or system defined customer details as available from the web chat form.

Click the column headers to sort workflows and workflow actions in ascending or descending order.

The following table describes the fields on the Manage Workflows gadget:

Field	Explanation
Name	The name of the workflow must be unique and can have a maximum length of 40 characters.
Description	The description of the workflow can have a maximum length of 128 characters.
Media	The media of the workflow. You can configure the media to Voice and any preferred Digital Channel.

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

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

Actions on the Manage Workflows and Manage Workflow Actions gadgets:

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

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

Each workflow must contain only one trigger. Triggers are based on Cisco Finesse dialog events.



Note You can configure the trigger only after you select the media.

- Voice dialog events include the following:

- When a Call arrives
- When a Call is answered
- When a Call ends
- When making a Call



Note The call variable workflow responds as expected only when you add both the conditions **Is not equal** and **Is not empty**.

- While previewing an Outbound Option call.

- Digital Channels dialog events include the following:

- When a task is offered
- When a task is accepted



Note Some solutions such as ECE don't provide a separate accept task functionality. Therefore, the tasks that are offered are auto accepted, which simultaneously generate the **task is accepted** event along with the **task is offered** event. In such scenarios, use only one event (**task is accepted** or **task is offered**) for configuring workflows because there is no difference between these two events.

- When a task is active
- When a task is paused
- When a task is interrupted
- When a task is closed

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



Note The workflow logic and examples are similar for all media.

- Its trigger set and conditions are evaluated against each dialog event received.
- The workflow engine processes workflow events for the first call that matches any configured workflow's trigger set and conditions. No other workflows run until this call has ended. If the agent accepts a second call while still on the first call, workflows do not run on the second call even after the first call has ended.
- After a workflow for a particular trigger type (for example, Call Arrives) runs, it never triggers again for the same dialog ID.

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



Note Whenever the browser is refreshed, the workflows that trigger the following events run:

- when a call arrives
- when a call is answered
- when making a call

When an agent refreshes the browser, the workflow engine considers the call as newly arrived or newly made. If an HTTP request action is part of the workflow, the HTTP request is sent when the agent refreshes the browser. Applications that receive the HTTP requests must account for this scenario.

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

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

Individual conditions comprise of the following:

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

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

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



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

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

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

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

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

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

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

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

If a user has multiple calls and the user refreshes the browser, the Workflow Engine treats the first dialog received from the Cisco Finesse server as the first displayed call. This call may not be the same call that was first displayed before the refreshing the browser. Dialogs received for any other call are ignored because they are not considered as first displayed calls. After refreshing the browser, if dialogs for more than one call are received before the Workflow Engine is loaded, none of the dialogs are evaluated because they are not considered as first displayed calls.

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

Workflow Triggers and Outbound Calls



Note

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

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

Workflow Trigger	Direct Preview Outbound Call	Preview Outbound Call	Progressive/Predictive Outbound Call
While previewing a call	When the agent previews the call (before accepting or rejecting it)	When the agent previews the call (before accepting or rejecting it)	Does not trigger
When a call arrives	Does not trigger	When the agent accepts the call	When the call arrives on the agent desktop
When a call is answered	When the customer answers the call and during failover	When the customer answers the call and during failover	When the customer answers the call
When a call is made	When the customer call is initiated	When the customer call is initiated	When the customer call is initiated, and during failover

Workflow Trigger	Direct Preview Outbound Call	Preview Outbound Call	Progressive/Predictive Outbound Call
When a call ends	When the customer call ends	When the customer call ends	When the customer call ends

Add Browser Pop Workflow Action

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



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

Procedure

Step 1 In the Manage Workflow Actions gadget, click **New**.

Step 2 In the Name box, enter a name for the action.

Note Workflow action names are limited to 64 characters.

Step 3 From the Type drop-down list, choose **Browser Pop**.

Step 4 From the Handled By drop-down list, choose what will run the action, either the Finesse Desktop or Other (a third-party gadget).

Step 5 In the Window Name box, enter the ID name of the window that is opened. Any action that uses this window name reuses that specific window.

Note Window names are limited to 40 characters, and can be blank. If you leave the window name blank, a new window opens every time the action runs.

Step 6 Enter the URL of the browser window and click the tag icon at the right of the box and select one or more variables from the drop-down list to add tags.

Example:

`http://www.google.com/search?q=`

For every variable you select, you can enter test data in the Sample Data box. A sample URL is automatically built in the Browser URL box below the Sample Data area. To test the URL, click Open to open the URL in your browser.

Note Finesse does not validate the URL you enter.

Step 7 Click **Save**.

Add HTTP Request Workflow Action

The HTTP Request workflow action makes an HTTP request to an API on behalf of the desktop user.

Procedure

- Step 1** In the Manage Workflow Actions area, click **New**.
- Step 2** In the Name box, enter a name for the action.
- A workflow action name can contain a maximum of 64 characters.
- Step 3** From the Type drop-down list, select **HTTP Request**.
- Step 4** From the Handled By drop-down list, select what will run the action, the Finesse desktop or Other (a third-party gadget).
- Step 5** From the Method drop-down list, select the method to use.
- You can select either PUT or POST.
- Step 6** From the Location drop-down list, select the location.
- If you are making the HTTP request to a Finesse API, select **Finesse**. If you are making a request to any other API, select **Other**.
- Step 7** In the Content Type box, enter the content type.
- The default content type is application/xml, which is the content type for Finesse APIs. If you are using a different API, enter the content types for that API (for example, application/JSON).
- Step 8** In the URL box, enter the URL to which to make the request. To add variables to the URL, click the tag icon at the right of the box and select one or more variables from the drop-down list.

Note The drop-down list contains variables from all the configured media channels.

Example:

The following is the URL example for a Finesse API:

/finesse/api/Dialog/

Note When the location is FINESSE, do not specify the protocol, host, and port information. Finesse automatically fetches these details when the REST request is run.

If you want to make a request to another API, you must enter the entire URL (for example, http://googleapis.com).

You can click the tag icon at the right of the box and select one or more variables from the drop-down list to add tags to the URL. In the preceding example, to add the dialogId, click the tag icon and select dialogId from the list.

- Step 9** In the Body box, enter the text for the request. The body must match the content type (for example, if the content types is application/xml, the body must contain XML). To add variables to the body, click the tag icon at the right of the box and select one or more variables from the drop-down list.

Example:

To make an HTTP request to the Dialog - Start a recording API, enter the following into the Body box:

```
<Dialog>
<targetMediaAddress>extension✕</targetMediaAddress>
<requestedAction>SEND_DTMF</requestedAction>
<actionParams><ActionParam><name>dtmfString</name><value>8</value></ActionParam></actionParams>
</Dialog>
```

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

For every variable you add, you can enter test data in the Sample Data box.

Step 10 Click **Save**.

Edit Workflow Action

Procedure

- Step 1** In the Manage Workflow Actions gadget, select the action that you want to edit.
- Step 2** Click **Edit**.
- Step 3** Edit the fields that you want to change.
- Step 4** Click **Save**.

Delete Workflow Action

Procedure

- Step 1** In the Workflow Actions gadget, select the action that you want to delete.
- Step 2** Click **Delete**.
- Step 3** Click **Yes** to confirm the deletion of the selected action.

Add Workflow

Procedure

- Step 1** In the Manage Workflows gadget, click **New**.

- Step 2** From the **Choose Media** drop-down, select the media.
- Note** In case of a voice only configuration, the **Choose Media** drop-down will display only Voice.
- Step 3** In the **Name** box, enter the name of the workflow.
- Note** The name is limited to 40 characters.
- Step 4** In the **Description** box, enter a description of the workflow.
- Note** The description is limited to 128 characters.
- Step 5** In the **When to perform Actions** drop-down list, select the event that triggers the workflow.
- Note** The drop-down actions change depending on the selected media.
- Step 6** In the **How to apply Conditions** box, select if all conditions are met, or if any conditions are met, and then click **Add Condition** to add up to five conditions.
- Note** Variables in the drop-down for conditions are grouped depending on the selected media.
- Example:**
- For example, you can specify that the action is taken when CallVariable 1 equals 123 and CallVariable 2 begins with 2.
- Step 7** In the Ordered List of Actions area, click **Add** to open the Add Actions area. Click an action in this area to add it to the Ordered List of Actions.
- Step 8** Use the up and down arrows next to the Ordered List of Actions to move actions into the performance order.
- Step 9** Click **Save**.
- Step 10** Assign the workflow to one or more teams.
- Note** A workflow does not run until it is assigned to a team.
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Edit Workflow

Procedure

- Step 1** In the Manage Workflows gadget, select the workflow you want to edit.
- Step 2** Click **Edit**.
- Note** The media for an existing workflow can be changed by editing the workflow.
- Step 3** Edit the fields that you want to change.
- Step 4** Click **Save**.
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Delete Workflow

Procedure

- Step 1** In the Manage Workflows gadget, select the workflow that you want to delete.
- Step 2** Click **Delete**.
- Step 3** Click **Yes** to confirm the deletion of the selected workflow.
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