



Cisco Finesse Desktop User Guide for Unified Contact Center Enterprise Release 11.6(1)

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Change History

The following table lists changes made to this guide for Cisco Finesse 11.6(1) release version:

Change	See	Date
Initial release of the document for Release 11.6(1)		August, 2017
Supervisors can view the recent call history of an agent.	View Recent Call History, on page 35	
Supervisors can view the recent state history of an agent.	View Recent State History, on page 36	
Agents and Supervisors can make calls from Ready State.	Make a Call, on page 24	
An Agent or Supervisor can view their call history by clicking on the 'My History' tab. Also, can initiate a call back using the Make Call icon.	View My History, on page 31	
Few behavioral changes in Wrap Up state.	Apply Wrap-Up Reason, on page 30	
Queue Statistics gadget is enabled by default as part of Cisco Finesse new installation.	Finesse Agent Desktop, on page 1	

About This Guide

Cisco Finesse has undergone a user experience refresh in release 12.0(1). This guide documents the new look and feel of the Agent and Supervisor desktop layouts along with release specific features.

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 (Unified CCE), Packaged Contact Center Enterprise (Packaged CCE), and Hosted Collaboration Solution(HCS) for Contact Center agents and supervisors who use the Finesse desktop.

Related Documents

Document or resource	Link
<i>Cisco Finesse Documentation Guide</i>	https://www.cisco.com/en/US/partner/products/ps11324/products_documentation_roadmaps_list.html
<i>Configure SNMP Trap in Cisco Finesse</i>	https://www.cisco.com/c/en/us/support/docs/contact-center/finesse/214387-configure-snmp-trap-in-cisco-finesse.html
Cisco.com site for Finesse documentation	https://www.cisco.com/en/US/partner/products/ps11324/tsd_products_support_series_home.html

Communications, Services, and Additional Information

- To receive timely, relevant information from Cisco, sign up at [Cisco Profile Manager](#).
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Cisco Bug Search Tool

[Cisco Bug Search Tool](#) (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

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- End-of-Sale or Support Announcements
- Software Updates

- Updates to Known Bugs

For more information on creating custom subscriptions, see *My Notifications* at <https://cway.cisco.com/mynotifications>.

Documentation Feedback

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

Conventions

This document uses the following conventions:

Convention	Description
boldface font	<p>Boldface font is used to indicate commands, such as user entries, keys, buttons, folder names, and submenu names.</p> <p>For example:</p> <ul style="list-style-type: none"> • Choose Edit > Find. • Click Finish.
<i>italic</i> font	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> • To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills. • A syntax value that the user must replace. Example: IF (<i>condition, true-value, false-value</i>) • A book title. Example: See the <i>Cisco Unified Contact Center Enterprise Installation and Upgrade Guide</i>.
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> • Text as it appears in code or that the window displays. Example: <code><html><title>Cisco Systems, Inc. </title></html></code>
< >	<p>Angle brackets are used to indicate the following:</p> <ul style="list-style-type: none"> • For arguments where the context does not allow italic, such as ASCII output. • A character string that the user enters but that does not appear on the window such as a password.



CHAPTER 1

Cisco Finesse Desktop Interface

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

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 3](#)
- [State and Call Timers, on page 5](#)
- [Finesse 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.

Figure 1: Cisco Finesse Agent Desktop



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

call, Conference, Transfer, 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 reasons: Reasons to indicate why you are changing your status to Not Ready or Sign Out (your administrator defines these reasons).
- Wrap-Up Reasons: Wrap-Up Reason for each call (your administrator defines the Wrap-Up Reasons).
- Phonebooks: List of contacts from which you can select one to call (your administrator defines what contacts appear in your phonebook).
- Workflows: Your administrator can define workflows that are triggered by call events (for example, your administrator may create a workflow that causes a browser pop on your desktop when a call arrives).
- 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.
- System Reason Codes: Due to system generated events, your state may change to either Not Ready or Sign Out with system generated reason codes. In this case, agent state is displayed in yellow.

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



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.



Note 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:

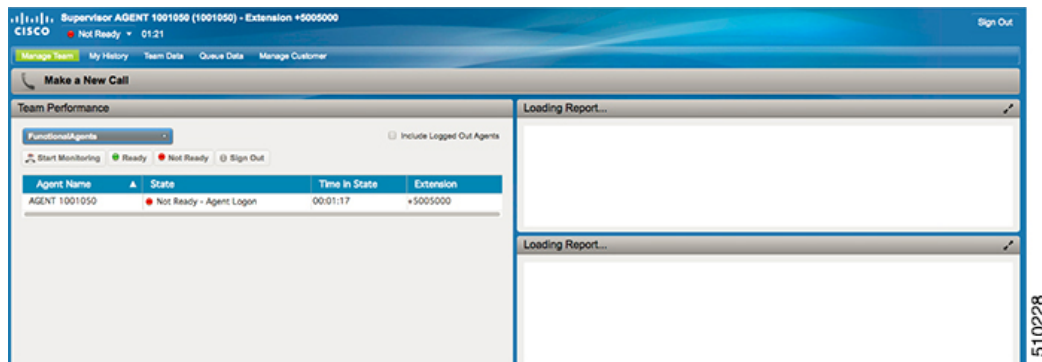
- Queue Name: The name of the queue.
- # Calls: The number of calls waiting in the queue.
- Max Time: The length of time the oldest call has been in the queue.
- Ready: The number of agents assigned to the queue who are in Ready state.
- Not Ready: The number of agents assigned to the queue who are in 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.

Finesse Supervisor Desktop

The following figure shows the Cisco Finesse supervisor desktop.

Figure 2: Finesse Supervisor Desktop



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.



Note As Unified CCE uses ASCII encoding (8-bits), while Finesse uses UTF-8 encoding (32-bits), the First Name field in the Team Performance window is truncated to only 16 characters.

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).

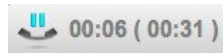
When you change state (for example, from Not Ready to Ready or from Not Ready with a reason code to Not Ready with a new reason code), the timer resets to 00:00.

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.



- **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.



- **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.



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

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 Finesse desktop window or tab is inactive, Finesse displays a notification with the call details. Click the notification to restore the Finesse desktop.

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



Note Internet Explorer does not support toaster notification.

Browser Settings for Chrome

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

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

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

Finesse Desktop Failover

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

The Finesse desktop checks for the following:

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

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

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



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

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

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



-
- Note** The Finesse desktop can only preserve 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.

Desktop Element	To Perform the Following Actions	Use the Following Keys
Address Bar	Move between the address bar and the frames (in Internet Explorer only)	F6
Sign-in Page		
Language Selector Drop-Down	Access the drop-down	Tab and Shift-Tab from the ID field
	Open the drop-down	Alt-Down Arrow or Enter
	Scroll the drop-down	Up and Down Arrows
	Select a language	Enter
	Hide the drop-down	Esc
Mobile Agent Help Tooltips	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc
Call Control Gadget		
Call Control Gadget Navigation	Access the call control gadget, phone book, and keypad	Tab and Shift-Tab
	Open and close the call control gadget	Enter
Phone book	Navigate the phone book contact entries	Arrow keys
Keypad	Navigate the keypad number buttons	Tab
	Make a new call	<ul style="list-style-type: none"> • Press Enter in the number display field OR • Navigate to the Call button and press Enter

Desktop Element	To Perform the Following Actions	Use the Following Keys
Wrap-Up Reason Drop-Down	Access the drop-down	Tab and Shift-Tab
	Open the drop-down	Alt-Down arrow
	Scroll the list of wrap-up reasons	Up and Down Arrows
	Select a wrap-up reason	Enter
	Close the drop-down	Esc
Callback Dialog Box and Reclassify Dialog Box (Outbound Calls)	Access the Callback and Reclassify buttons	Tab and Shift-Tab
	Open the Callback and Reclassify dialog boxes	Enter (on the respective buttons)
	Close dialog boxes	<ul style="list-style-type: none"> • Press Esc OR • Navigate away from the dialog boxes using Tab or Shift-Tab
Reclassify Dialog Box	Navigate the elements	Tab, Shift-Tab, Up and Down Arrows
	Select an option	Enter
	Close the Reclassify dialog box	Esc
Callback Date and Time Calendar	Navigate to and from the Calendar	Tab and Shift-Tab
	Navigate within the Calendar	Arrows
	Select a Calendar date	Enter
	Move to the first or last days of a month	Home and End
	Close the pop-up	Esc
Callback Date and Time Controls	Navigate the elements	Tab and Shift-Tab
	Increase and decrease the Hour and Minute values	Up and Down Arrows
	Toggle the AM/PM button	Enter
	Close the pop-up	Esc
Desktop		
Send Error Report Tooltip	Access and display a tooltip	Tab and Shift-Tab
	Hide a tooltip	Esc

Desktop Element	To Perform the Following Actions	Use the Following Keys
Third-Party Gadget		
Maximize Icon	Access the maximize icon	Tab and Shift-Tab
	Maximize and restore a third-party gadget	Enter



Note For Email and Chat Keyboard shortcut keys, see *Cisco Finesse Agent and Supervisor Desktop User Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-user-guide-list.html>.

Screen Reader Support

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

Page or gadget	Element	Notes
Sign-in Page	Mobile agent help icon	The screen reader reads descriptive text for the help icon.
	Invalid Sign in error	When a sign-in error occurs due to invalid password or username, the screen reader reads the error. Note In Internet Explorer, the message is read 1 to 3 times.
Queue Statistics gadget	Title	The screen reader reads the gadget title (Queue Statistics).
Call Control Gadget	Phone Book	The screen reader reads the contents of the phone book. Note <ul style="list-style-type: none"> The screen reader is not able to read the summary of this table by using CTRL+INSERT+T. As a workaround, use the heading key instead. The phone book does not support use of CTRL+ALT+RIGHT/LEFT/UP/DOWN arrow keys to move between cells in the table. The screen reader does not read the heading of each column in IE11.

Page or gadget	Element	Notes
	Keypad	<p>The screen reader reads the number of the keypad and the letters that go with it (ABC, DEF, and so on).</p> <p>Note</p> <ul style="list-style-type: none"> • In the table summary, if you select the table, the screen reader reads the summary of the table, which is Keypad. • If you press Enter on a Keypad button with JAWS enabled, the digits are not entered or displayed in the edit box on top of the Keypad. • If you use Ctrl+Alt+Right, Left, Up, and Down arrow keys to move between the cells, extra buttons are read on the Keypad.
	Call row errors	The screen reader reads the call row error messages.
Agent Desktop	Headings	The screen reader reads all the headings on the Agent Desktop (HTML elements <h1> to <h6]>).
	Failover Banner	During failover, the screen reader reads the statement from the red banner. When the Failover is complete, the screen reader reads the statement from the green banner.
	State Change text	Whenever the agent state changes, the screen reader reads the new state.
Desktop	Send clients logs help icon	The screen reader reads descriptive text for the help icon.



CHAPTER 2

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.

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- [Sign In to Finesse Desktop, on page 15](#)
- [Sign In as Mobile Agent, on page 18](#)
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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.

Finesse does not support Compatibility View. When the desktop is running in Compatibility View, Internet Explorer renders in the standard mode for that version.

2. Configure the following privacy and advanced settings:
 - a. From the browser menu, select **Tools > Internet Options**.
 - b. Click the **Privacy** tab.
 - c. Click **Sites**.
 - d. In the Address of website box, enter the domain name for the Side A Finesse server.
 - e. Click **Allow**.
 - f. In the Address of website box, enter the domain name for the Side B Finesse server.
 - g. Click **Allow**.
 - h. 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:

- a. From the Internet Explorer browser menu, select **Tools > Internet Options**.
- b. Click the **Security** tab.
- c. Click **Custom level**.
- d. Under ActiveX controls and plug-ins, select **Enable** for **Run ActiveX controls and plug-ins** and **Script ActiveX controls marked safe for scripting**.
- e. 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*.
 - Step 5** Restart Firefox.
-

Browser Settings for Chrome

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

Procedure

- Step 1** Open Chrome and enter `chrome://flags/#automatic-tab-discarding` in the address bar.
 - Step 2** Press **Enter**.
 - Step 3** Select **Disabled** from the drop-down list.
 - Step 4** Click **Relaunch Now**.
-

Sign In to Finesse Desktop



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

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

Procedure

- Step 1** 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](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 **Username** 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). The supported characters are: **A-Z and 0-9**, **,, -, !, ~, ` , \$, ^, &, (,), ", ', {, }, @, .**. They do not support the following characters, **/, \, [,], :, ;, |, =, ,, +, *, ?, <, >**.
- The Username (desktop Sign In page) in Unified CCE deployment refers to the AgentID (Peripheral number).

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/](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](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 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 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 Finesse landing page is displayed. In the **Extension** field, enter the extension of your phone.
- Step 8** Click **Submit**.
- 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** 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 Finesse 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 Finesse with the wrong password five times in a row, Finesse blocks access to your account for 5 minutes. For security reasons, if you try to sign in again during that time, Finesse does not alert you that your account is locked. You must wait 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 Finesse 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.



Note 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 Ready or 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 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 2 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 3 Click **Call**.

5555555 <input type="button" value="X"/>		
1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0 +	#
Call	Cancel	

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

Answer a Call

You must be in Ready state to be available for customer calls. When a call arrives at the desktop, your state automatically changes to Reserved. The call control area expands to show the call variables configured for your system.



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.

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.

- Step 4** The icon on the Reclassify button changes to the icon for the selected option.
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.

Option	Description
To end the consult call and retrieve the customer call	Click End on the consult call and then click Retrieve on the customer call.

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

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 can be applied on all Inbound calls routed to the Contact Center and on all the Contact Center triggered outbound campaign calls only. If you do not have any Wrap-Up Reasons assigned to you, you will not have this feature on your desktop. Your administrator creates and assigns Wrap-Up Reasons.



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

You can enter a Wrap-Up Reason during a call or while you are in Wrap-Up state after the call ends (this includes normal call termination as well as transfer and conference drop scenarios). If Wrap-Up is required 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.



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.



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



Note If you are configured for wrap-up, you may enter Wrap-Up state after you transfer a call. However, the timer on the desktop does not display the wrap-up time.

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

Procedure

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

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 My History

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

Recent Call History

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

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

Recent State History

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

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

View 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.
-



CHAPTER 3

Supervisor Tasks

This chapter describes the tasks that supervisors perform.

- [View Team Performance, on page 35](#)
- [View Recent Call History, on page 35](#)
- [View Recent State History, on page 36](#)
- [Change State of Agent, on page 37](#)
- [Monitor a Call, on page 37](#)
- [Barge In on a Call, on page 38](#)
- [Intercept a Call, on page 39](#)

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 Team Name 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. You can select an agent row to view the recent call history and state history of the agent.

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

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

View Recent Call History

Use the Team Performance gadget to view the call history of an agent of your assigned team.

Procedure

Step 1

Select the team from the drop-down list whose agent's call history data you want to view.

Step 2

Select the agent from the list displayed on the Team Performance gadget. By default, the list will contain all logged in agents for the selected team. If you wish to view both logged in and logged out agents, click the **Include logged out agents** checkbox.

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

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

Note

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

View Recent State History

Use the Team Performance gadget to view the state history of an agent of your assigned team.

Procedure

Step 1

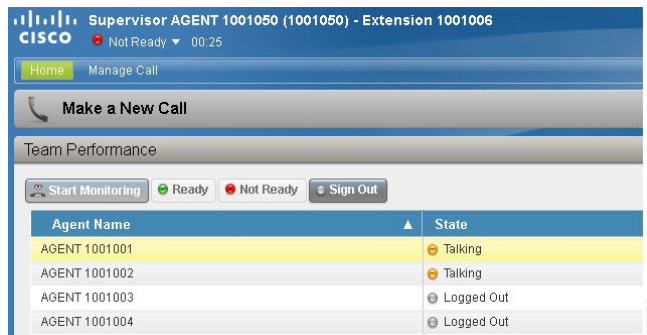
Select the team from the drop-down list whose agent's state history you want to view.

Step 2

Select the agent from the list displayed on the Team Performance gadget. By default, the list will contain all logged in agents for the selected team. If you wish to view both logged in and logged out agents, check the option **Include logged out agents**.

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

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



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.

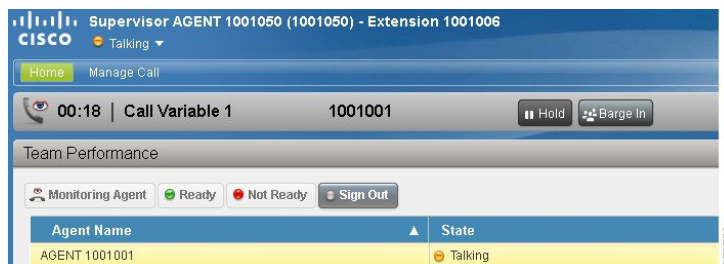
Procedure

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.



CHAPTER 4

Finesse IP Phone Agent Tasks

- [Finesse IP Phone Agent](#), on page 41
- [Sign In to Finesse on the IP Phone](#), on page 42
- [Change State on the IP Phone](#), on page 43
- [Apply Wrap Up Reason on the IP Phone](#), on page 44
- [Sign Out of Finesse on the IP Phone](#), on page 45
- [Recover Finesse IP Phone Agent Service After Failure](#), on page 45
- [Set Finesse Service and Credentials Using the Self Care Portal](#), on page 45
- [Finesse IPPA Behavior](#), on page 46

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.

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

Task	Steps
Change State	Press Ready or NotReady .
Apply Wrap Up Reasons	Press WrapUp and select from the list.
Enable Optional Wrap Up	If Wrap Up is optional, press WrapUp during the call to move to Wrap Up state after the call ends.
Sign Out	From the Not Ready state, press SignOut .

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

Sign In to Finesse on the IP Phone

Before you begin

Your administrator must set up your Finesse IPPA access.

Procedure

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



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

- Step 2** Select **Cisco Finesse**.
- Step 3** Enter your agent ID, password, and extension, and press the **SignIn** button.



- Note**
- You must enter your agent ID in the ID field. Unlike the Finesse desktop, Finesse IPPA does not support username for sign in.
 - The **ID** (Finesse IPPA) in Unified CCE deployment refers to the AgentID (Peripheral number).

The home screen appears.



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

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

Change State on the IP Phone

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

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

Procedure

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

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 administrator 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.
- Step 2** If Sign Out reason codes appear, scroll to the desired Sign Out reason, and press the **Select** button.
-

Recover Finesse IP Phone Agent Service After Failure

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

Procedure

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



Note

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

Set Finesse Service and Credentials Using the Self Care Portal

Your administrator may ask you to subscribe your phone to the Finesse service using the Unified CM Self Care Portal. 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 in to the Self Care Portal from the following URL:
`http://UCM address/ucmuser`
where *UCM address* is the address of Cisco Unified CM provided by your administrator.
- Step 2** On the Self Care Portal, navigate to **Phones > Phone Settings > Services**.
- Step 3** Select the phone that you want to subscribe to the Finesse service.
- Step 4** If your administrator has already subscribed this phone to the Finesse service, click the **Edit Service** icon for the Finesse service, and go to Step 7. Otherwise, go to Step 5.
- Step 5** Click **Add New Service** for the phone and select the Finesse service from the drop-down list.
- Step 6** In the Display Name field, enter **Cisco Finesse** (or another display name that is appropriate for your phone).
- Step 7** If your administrator requests that you enter your credentials, enter the required values for your agent id, password, and extension.
- Step 8** Click **Save**.
-

What to do next

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

Finesse IPPA Behavior

The following 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.

Additional Finesse IPPA Behavior

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



CHAPTER 5

Troubleshooting

This chapter provides troubleshooting information for the Cisco Finesse desktop.

- [Send Error Report, on page 49](#)

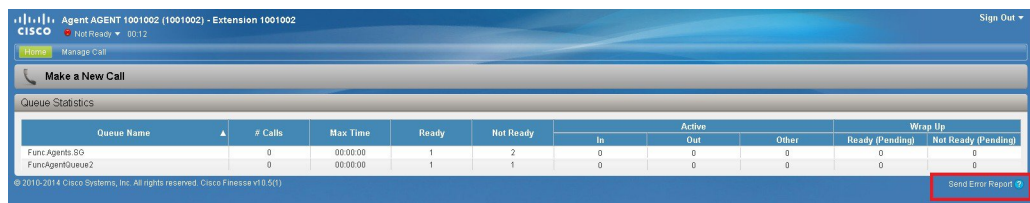
Send Error Report

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.

