



## **Cisco Finesse 12.5 Agent Desktop Training**

Revision: 1.2

**For: State of Illinois – Department of  
Innovation and Technology**

**Presidio Networked Solutions, Inc.**

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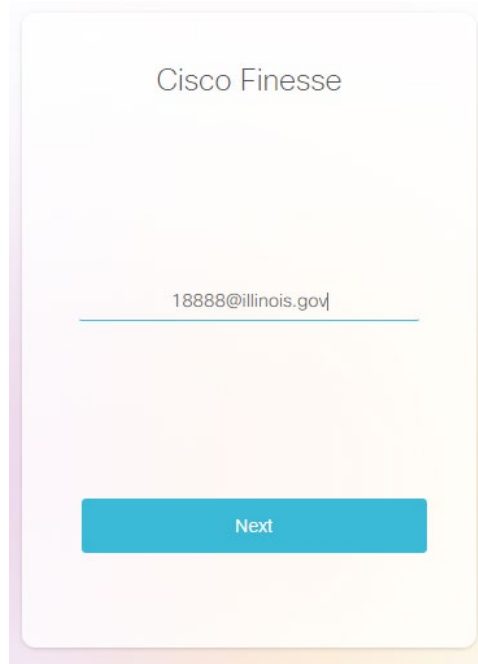
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## 1.0 LOGGING INTO CISCO FINESSE AGENT DESKTOP

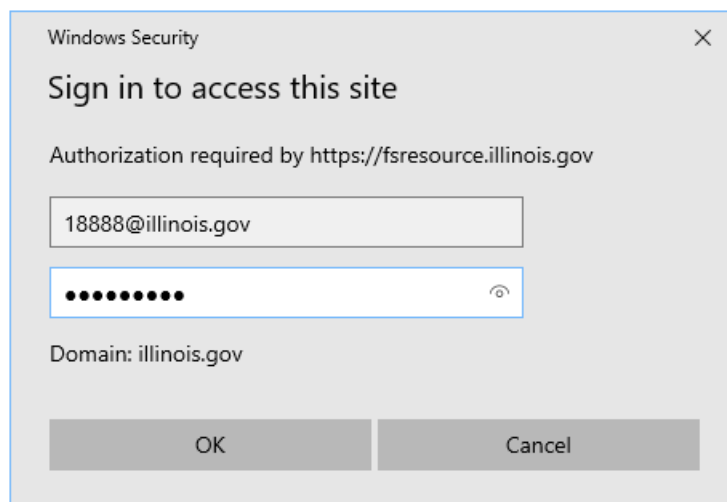
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To log into Finesse:

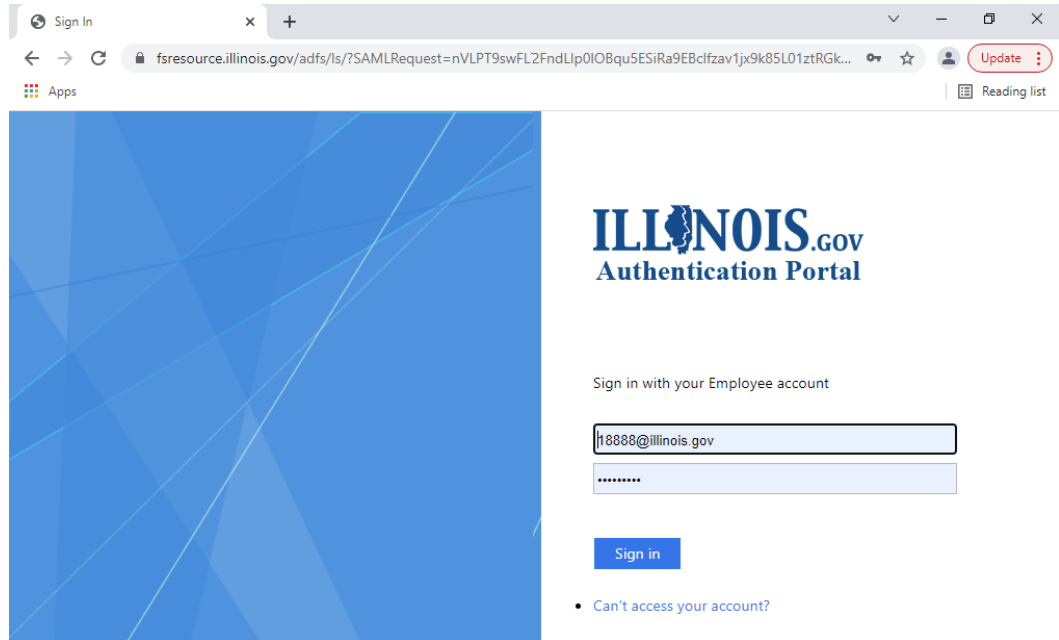
1. Ensure your Cisco jabber client is logged in and active.
2. Open a web browser and navigate to the Finesse website assigned to your call center.
3. Enter your Illinois.gov username



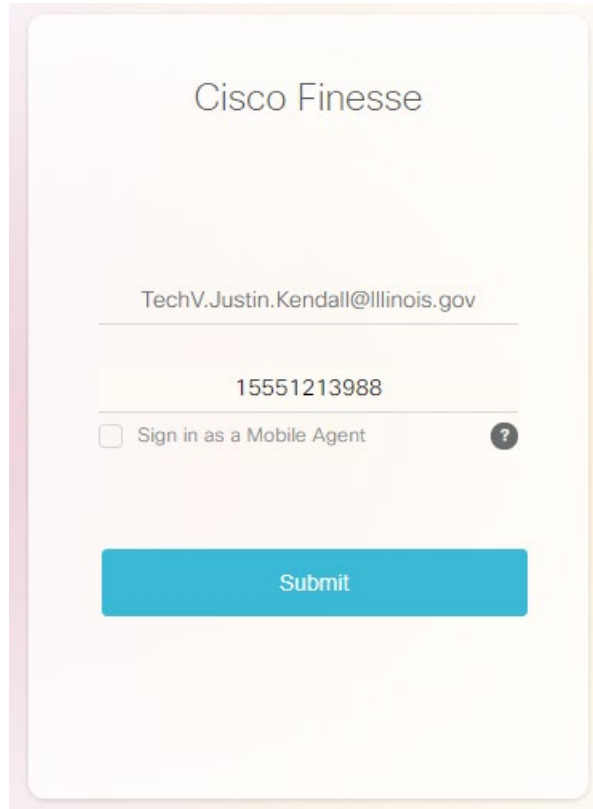
4. Click Next
5. Depending on your browser, you'll be asked to provide your Illinois.gov credentials.  
Click "OK" or "Sign In" after entering them.
  - a. Microsoft Edge



b. Chrome / Firefox



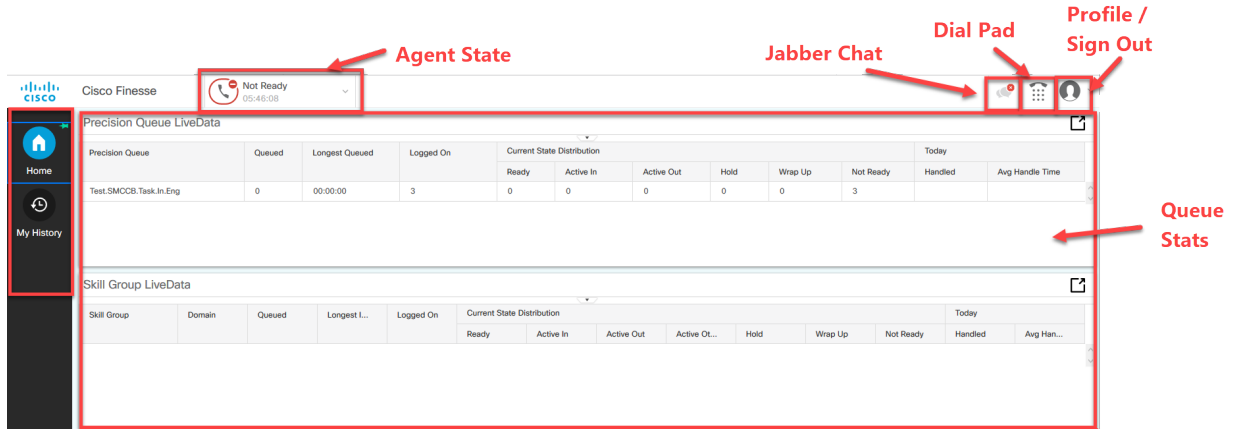
6. Enter your extension into the "Extension" field below your username.



7. Click "Submit"

## 2.0 CISCO FINESSE AGENT DESKTOP WINDOW OVERVIEW

The Cisco Finesse Agent Desktop main window displays information about active calls, Queue Statistics and Agent Statistics. It also enables you to perform phone functions.



### 2.1 Page Tabs

The Page tabs allow you to change what page in the Finesse Agent Desktop you would like to view. The pages include:

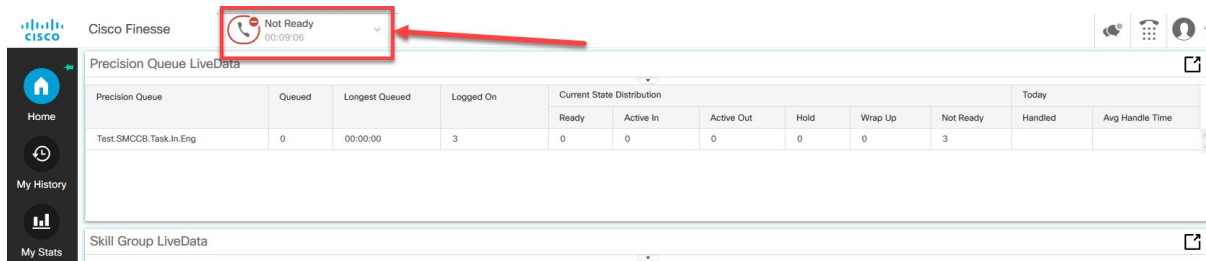
**Home** tab – displays the number of calls waiting in the queue as well as the amount of the time the first caller has been waiting in the queue. You will also be able to see your team members' current status.

**My History** tab – displays your recent call information as well as the recent state history. This information is real-time, updated about every 30 seconds.

**My Stats** tab – displays agent statistics for the current week such as Calls Handled, Average Handle Time, Logged in Time, and Wrap Time for each queue assigned to the agent.

## 3.0 CHANGING STATE TO READY/NOT READY

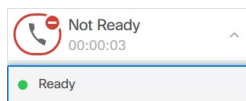
The **Agent State** pull down tab enables you to make yourself **Ready/Not Ready** throughout the day.



**Note:** When you first log into the Finesse Agent desktop, you will be in a **Not Ready** state. If you are a current Finesse user, this is unchanged from the previous version.

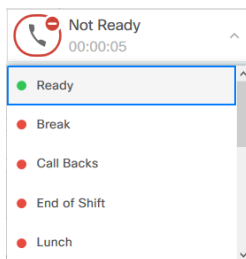
### 3.1 Changing State to Ready

To receive Inbound Queue calls/tasks, pull down the tab and select **Ready**.



### 3.2 Changing State to Not Ready

To stop receiving Queue calls, select **Not Ready** and the **Reason Code** that applies. The reason codes you have available to you will be the same reason codes that were assigned to you before the upgrade. If you see any discrepancies, please notify your supervisor.

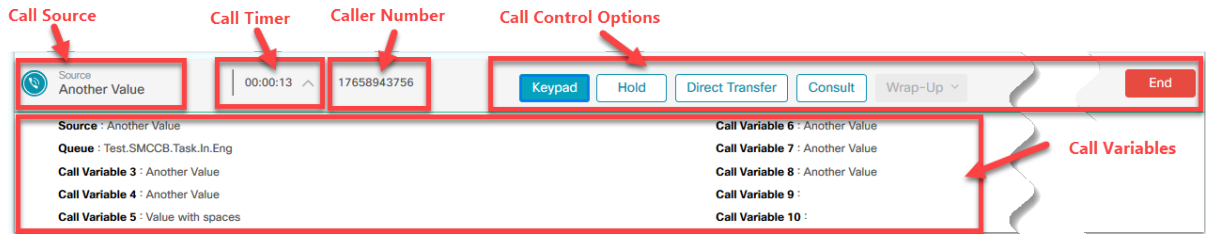


## 4.0 HANDLING CALLS

To handle calls, you can either use the call control options built into Finesse or your physical Cisco IP Desk Phone just as you could before the upgrade. Either option will allow you to see the call display in the Finesse Agent interface and on your phone.

### 4.1 Call Control Overview

Calls that you wish to control through Finesse are controlled through the Call Control Gadget. This call control only becomes visible when you are actively on a call.



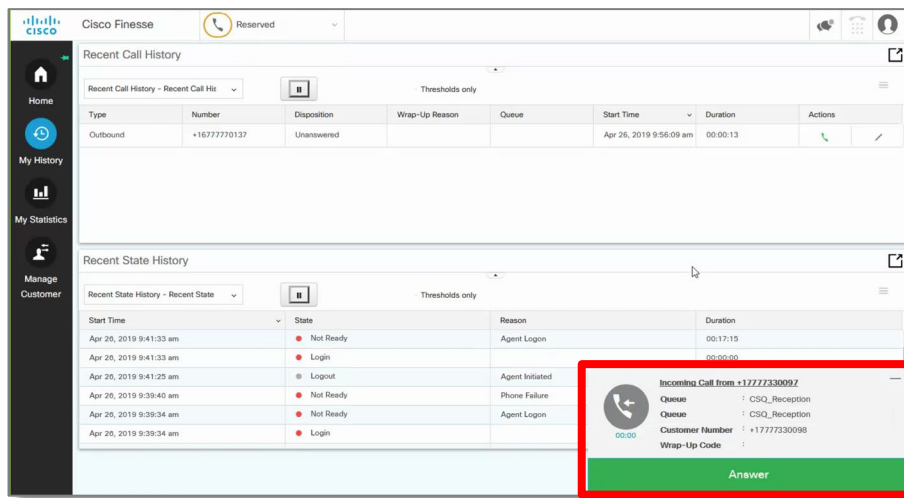
**Call Source** – This is the agency-configured value set for where the call came from. Depending upon the agency this could be the hotline number that was dialed or a value indicating which call center the call arrived from.

**Call Variables** – This is any information that has been captured by the contact center system from the caller. The values shown above are generic examples. Each agency/hotline varies in the information shown here.

## 4.2 Answering a Call

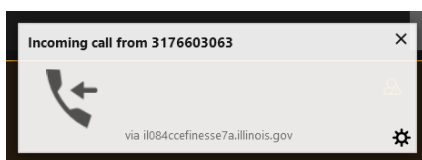
You can receive queue calls and calls to your agent extension through Finesse Agent Desktop. You **MUST** be **Logged in**, and in **Ready** state to receive calls/tasks from your queues.

You will see an incoming call pop up box at the bottom of the Finesse page when a call arrives. The information will include caller ID and information about the call.



To answer the call, click the green **Answer** button.

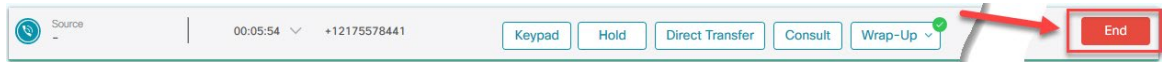
**Note\***- If you're using a web browser other than Internet Explorer, you'll also see a popup notification on your desktop if the Finesse page is minimized. You can click on this popup notification to bring Finesse to the foreground.



Once the call is established, you can view the total call time to the left of the caller ID in the call control gadget.

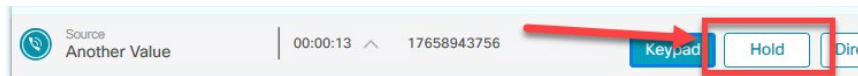


To end a call, click the red **End** button.

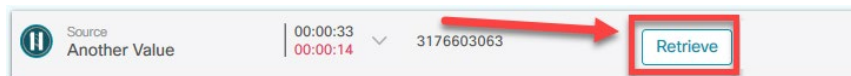


### 4.3 Working with Hold

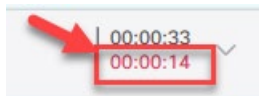
To place a call on hold, click **Hold**.





To take the caller off hold, click **Retrieve**.



You can tell how long the caller has been on hold by looking at the red timer on the call's gray call control bar:



You can tell the current state of a call by looking at the icon on the left side:

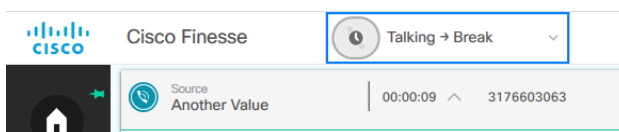
-  The call is active
-  The call is on hold

### 4.4 Managing State within a Call

By default, agents are automatically put to **Ready** state when a call is finished. Sometimes, agents need to put themselves **Not Ready** instead once their call is finished.

At any point during your call, you can select a **Not Ready** code from the list. Doing so will mark you to go **Not Ready** once your call is finished. You can see this reflected in the state dropdown box once you select the **Not Ready** code.

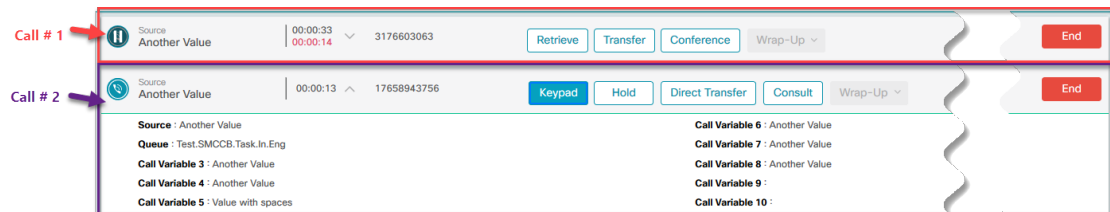
**Example:** The agent below has selected the “Break” reason code. As such, the agent is currently in **Talking** state but when finished will be transitioned to **Not Ready – Break** after any wrap up is finished.





## 4.5 Handling Multiple Calls at Once

When handling multiple calls, i.e. during a transfer or consult, there are separate gray bars displayed in Finesse for each call that is currently on your agent line. If you have 2 calls on your agent line, you'll see 2 gray bars that represent the options and call information for that particular call.



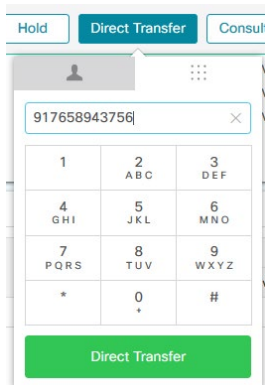
## 4.6 Transferring a Call – Direct Transfer

To conduct a direct transfer (without waiting for the other person to answer first):

1. Click Direct Transfer.



2. Dial a number to whom you wish to transfer the call. Call will be transferred immediately after selecting the green **Direct Transfer** button.



## 4.7 Transferring a Call – Consultative Transfer

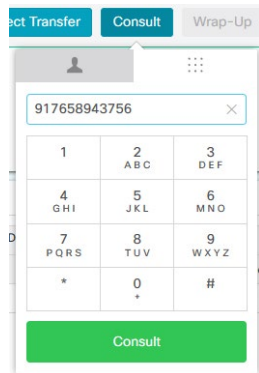
To transfer a call:

1. Click **Consult**



**\*Warning:** Caller does not go on hold with **Consult**. The caller will be able to hear you talking while you are entering the number you are calling. Once you hear the ringing phone of the person to whom you are transferring or conferencing, you know the caller is on hold.

2. Dial a number to whom you wish to transfer the call and press the green Consult button.



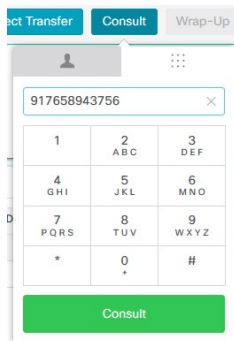
3. Wait for the other person to answer, then announce the call.
4. To complete the transfer, click **Transfer**.



## 4.8 Conferencing a Call

To add another party to an active call:

1. Click Consult
2. Dial the number of the person you wish to add and select the green **Consult** button.



3. To bring all parties together, click **Conference**.



## 4.9 Wrap Up

### 4.9.1 Automatic Wrap Up Time

Agents can be configured to receive a certain amount of automatic wrap up time for the agent to finish any after call work before they are automatically returned to a Ready state in the queue.

If you are a current Finesse user and upgrading, this amount of time is unaffected by the upgrade and will continue to provide the configured number of seconds of wrap up time that is configured.

You can see the amount of wrap up time **REMAINING** within the agent state dropdown:



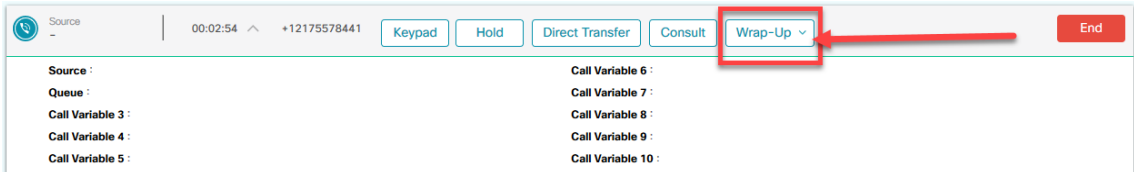
### 4.9.2 Wrap-Up Codes

In addition to being configured for automatic wrap up time, agents may also be configured to select a wrap up reason code to describe the disposition of their calls.

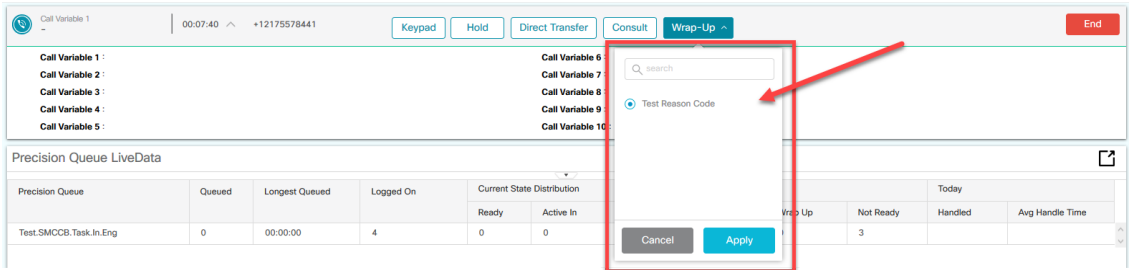
#### 4.9.2.1 Apply Wrap-Up Code

Wrap-up codes can be selected during the call or while in the **Wrap-Up** state.

1. Select the **Wrap-Up** dropdown

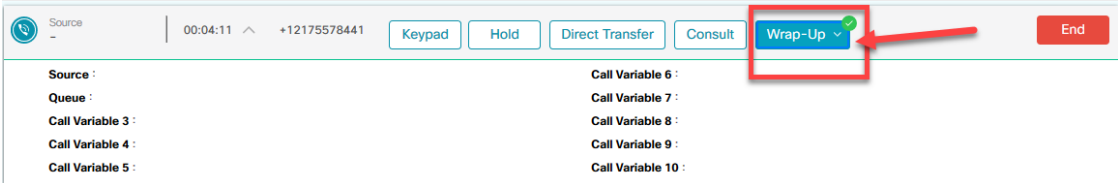


2. From the list, you can scroll or search for the wrap up code you want to select and select it.



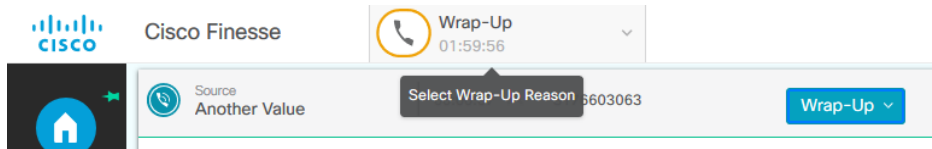
**\*Note:** You will continue to have available any wrap up codes you had before the upgrade.

3. Select the **Apply** button to apply the wrap up code you selected.
4. You'll see the little green checkmark indicating the wrap up code was successfully applied.



#### 4.9.2.2 Failure to select a Wrap-Up code

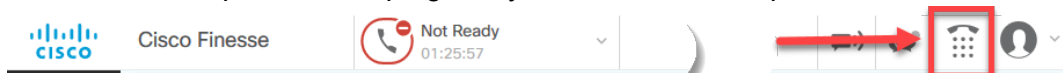
If you've been configured to select a wrap up reason code, you are **REQUIRED** to select a reason code before you can move out of the Wrap-Up state. If you attempt to change your state before selecting a reason code, you will encounter the following:



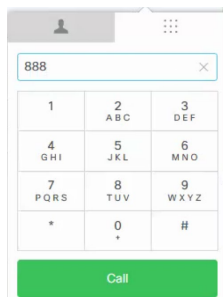
### 4.10 Making a Call Using Cisco Finesse Agent Desktop Dial Pad

To make a call:

1. Click on the dial pad at the top right of your Finesse desktop.




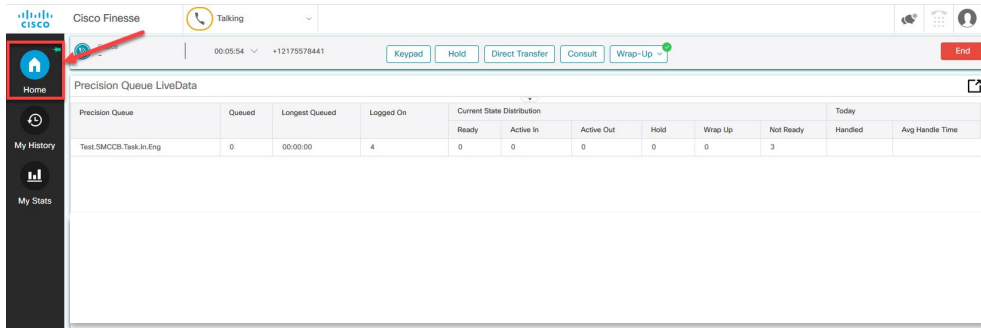
2. Dial the number you wish to call then select the green Call button. You can dial using your computer's mouse to select the digits on your Finesse Agent Desktop or you can use the number keys on your computer keyboard. You can also copy and paste numbers for dialing.



## 5.0 QUEUE STATUSES

The Cisco Finesse Agent Desktop allows each agent to monitor callers in their queues as well as the overview of agent statuses in those queues.

These reports are located on the **Home**  tab.




The screenshot displays the Cisco Finesse Agent Desktop interface. At the top, there is a navigation bar with the 'Home' tab selected and highlighted by a red box and arrow. Below the navigation bar, the 'Precision Queue LiveData' report is visible. The report includes a table with the following data:

Precision Queue	Queued	Longest Queued	Logged On	Current State Distribution					Today		
				Ready	Active In	Active Out	Hold	Wrap Up	Not Ready	Handled	Avg Handle Time
Test.SMCGB.Task.In.Eng	0	00:00:00	4	0	0	0	0	0	3		

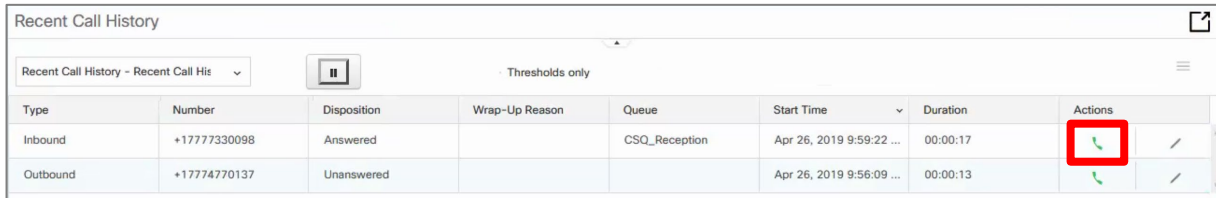
### 5.1 Precision Queue LiveData Report



- The **Precision Queue LiveData Report** provides statistics for each Precision Queue the agent has been assigned to (if any have been assigned)

## 6.0 MY HISTORY

The **My History**  tab displays **Recent Call History** and **Recent State History** for each individual agent. You only see your own history, not your other team members' history.


### 6.1 Recent Call History – Top Report



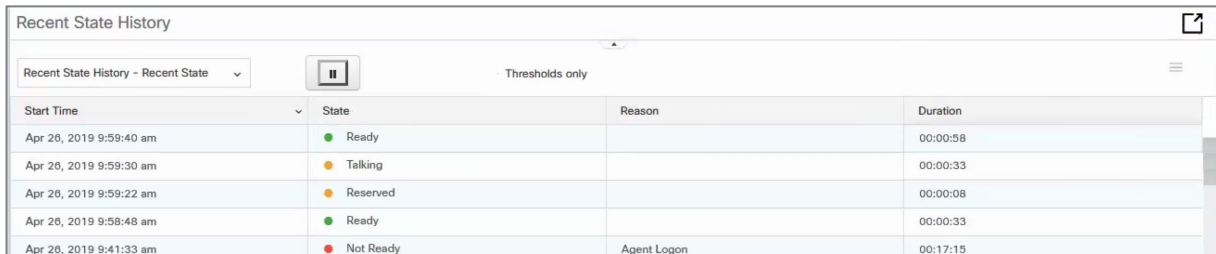
Type	Number	Disposition	Wrap-Up Reason	Queue	Start Time	Duration	Actions
Inbound	+17777330098	Answered		CSQ_Reception	Apr 26, 2019 9:59:22 ...	00:00:17	
Outbound	+17774770137	Unanswered			Apr 26, 2019 9:56:09 ...	00:00:13	

This real-time report shows each individual agent's:

- Inbound calls on Agent Contact Center extension
- Outbound calls on Agent Contact Center extension
- To place a call from the call history information click on the green

 handset next to the historical call information. A dial pad with the telephone number pre-populated will appear on your screen to edit the number if necessary and complete the call.

### 6.2 Recent State History – Bottom Report



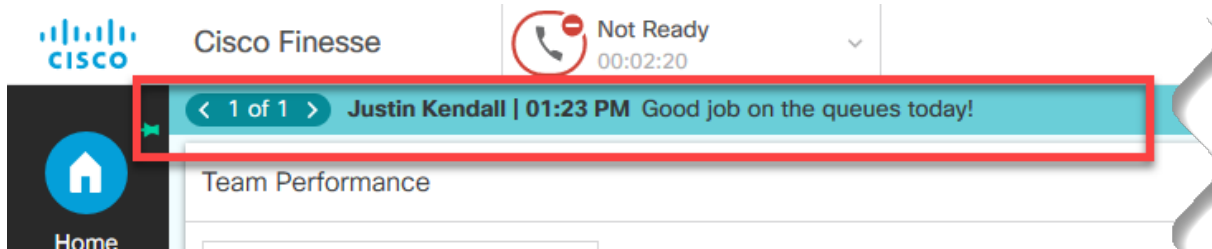
Start Time	State	Reason	Duration
Apr 26, 2019 9:59:40 am	Ready		00:00:58
Apr 26, 2019 9:59:30 am	Talking		00:00:33
Apr 26, 2019 9:59:22 am	Reserved		00:00:08
Apr 26, 2019 9:58:48 am	Ready		00:00:33
Apr 26, 2019 9:41:33 am	Not Ready	Agent Logon	00:17:15

This real-time report shows agent's personal statistics for:

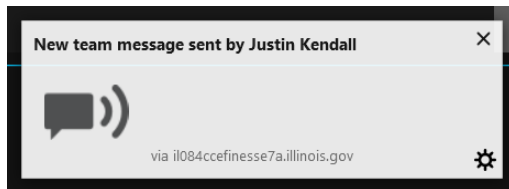
- **State** – Agent's state such as Logged-In, Logout, Ready/Not Ready, Reserved, Talking, or Work.
- **Reason Code** – Shows each Not Ready reason code selected throughout the day
- **Duration** – Time agent spent in each state.

## 7.0 TEAM BROADCAST

Your supervisor can send out broadcast messages to Finesse for the teams they supervise. If your supervisor does so, it will look like this:




If you're using a browser other than Internet Explorer to log into Finesse, when a message is sent you'll see a popover message indicating a new message has been sent, even if you have the Finesse page in the background.



## 8.0 AGENT STATISTICS REPORTS

### 8.1 Agent Call Statistics Report

To view your statistics, select the **My Stats**  tab. These are historical statistics.

Agent Call Statistics This Week 

Date	Queue	Media	CallsHandled	AutoOutCalls	AHT	InternalCalls	OutExtnCalls	TransferOu...	TransferIn...	RedirectCalls	AgentLogg...	WrapTime
10/5/20	PG7.UCM.Cisc...	Cisco_Voice	0	0	00:00:00	0	0	0	0	0	00:00:32	0
10/5/20	Test.SMCCB.Ta...	Cisco_Voice	0	0	00:00:00	0	0	0	0	0	00:00:32	0
10/6/20	PG7.UCM.Cisc...	Cisco_Voice	0	0	00:00:00	0	0	0	0	0	04:42:41	0
10/6/20	Test.SMCCB.Ta...	Cisco_Voice	0	0	00:00:00	0	0	0	0	0	04:42:41	0
10/8/20	PG7.UCM.Cisc...	Cisco_Voice	0	0	00:00:00	0	1	0	0	0	07:05:45	0
10/8/20	Test.SMCCB.Ta...	Cisco_Voice	0	0	00:00:00	0	0	0	0	0	07:05:45	0
			0		00:00:00	0	1				07:05:45	

The **Agent Statistics** report will allow you to view:

- **Date** – The date of the statistics.
- **Queue** – The queue the agent has statistics for
- **Media** – This is the routing domain the calls came from. For phone calls, this will be “Cisco\_Voice”.
- **Calls Handled** – all queue calls that you answered. If the number of Calls Offered and Calls Handled do not match, this may indicate that you missed queue calls by not putting yourself in Not Ready.
- **AutoOutCalls** – The number of automated outbound dialer calls handled by the agent
- **AHT** – Average handle time of tasks handled within that queue.
- **AvailTime** – The total time the agent spent in a **Ready** state within the queue. This only includes time in which you marked yourself ready and there were no calls in the queue to be assigned to you.
- **Internal Calls** – The number of calls made to internal destinations from your agent extension
- **OutExtnCalls** – The number of outbound external calls made from your agent extension from that queue.
- **TransferOutCalls** – The number of calls transferred out from your agent extension.
- **TransferInCalls** – The number of calls that were transferred into your agent extension from elsewhere.
- **RedirectCalls** – The number of calls that were redirected from your agent extension due to no answer.
- **AgentLoggedOnTime** – The amount of time the agent was logged into that queue on that day.
- **Avg WrapTime** – The average amount of automatic wrap up time spent on calls in this queue on this day by the agent.



## 9.0 SIGN OUT

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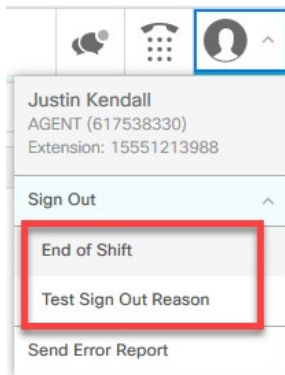
When you are done working for the day, or you need to put your computer to sleep or shut it down, ensure you first sign out of Finesse using the procedure below.

To sign out of the Finesse Agent Desktop:

1. You **must** put yourself in a **Not Ready** state. If you sign out from a **Ready** state, you will see the Sign out option is greyed out.
2. Put yourself in **Not Ready** and select the pull-down arrow near your profile avatar.



3. Click the appropriate **Sign out** reason, usually End of Shift.



## 10.0 AGENT GREETING

### 10.1 Overview

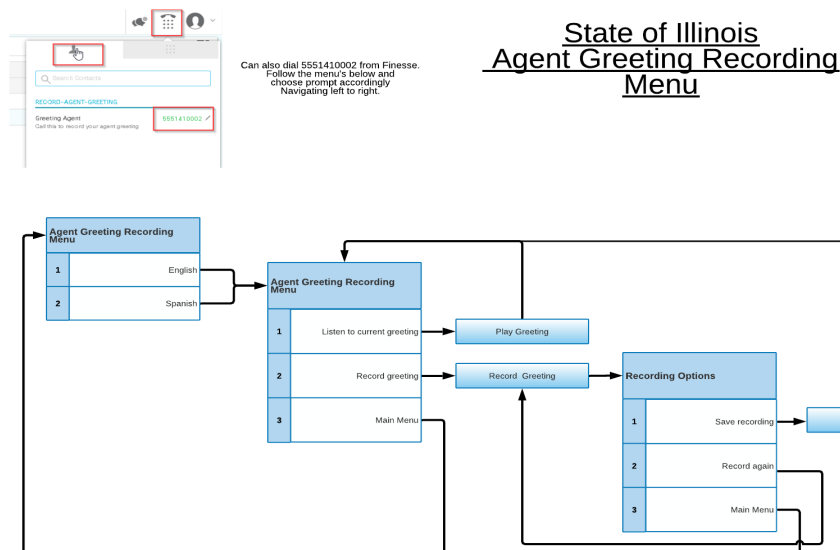
The Agent Greeting feature lets an agent record a message that plays automatically to callers when they connect to the agent. The greeting message can welcome the caller, identify the agent, and include other useful contextual information. With Agent Greeting, each caller can receive a clear, well-paced, language-appropriate, and enthusiastic introduction. Another benefit is that it saves the agent from having to repeat the same introductory phrase for each call. It also gives the agent a moment to review the desktop software screen popups while the greeting plays.

There are two greetings, English and Spanish. If you are an English Agent you only need to record greeting “1” for English. If you are a Spanish Agent, you need to record greeting “1” for English calls and “2” for Spanish calls, the system will automatically select the appropriate greeting to play based on the language the queue services.

### 10.2 Call Flow

You must dial the agent greeting number using your Finesse logged in agent. Click the Dial Pad icon in Finesse and the Phone Book icon and select the Agent Greeting phone book entry to initiate the Agent Greeting Recording session. You can also click the Dial Pad icon in Finesse and dial 5551410002 to reach the Agent Greeting recording application.

Once in the application, select the appropriate Language greeting number, 1 for English, 2 for Spanish, that you wish to record and follow the prompts to review and/or record your greeting.



NOTE : Once you successfully record your agent greeting

## 11.0 FINESSE ACCESS KEYBOARD SHORTCUTS

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



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

---

### 11.1 Procedure

Press **Ctrl + Alt + F**.

or

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

The Keyboard Shortcuts List dialog box lists the following:

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

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

---

- [Agent Keyboard Shortcuts](#)
- [Supervisor Keyboard Shortcuts](#)

#### 11.1.1 Agent Keyboard Shortcuts

The following table lists the agent-specific keyboard shortcuts.

Group	Action	Shortcut Key	Notes
Agent State	Ready for Call	Ctrl + Alt + R	-
	Not Ready for Call	Ctrl + Alt + N	Displays the reason codes drop-down when there are multiple Not Ready reason codes listed.

Group	Action	Shortcut Key	Notes
	Open Digital Channel State Control	Ctrl + Shift + L	-
	Ready for All Digital Channels	Ctrl + Shift + V	-
	Not Ready for All Digital Channels	Ctrl + Shift + Z	-
Application	Switch between Popover	Ctrl + Alt + P	Toggles between the popovers when there are multiple popover notifications.
	Maximize/Restore view	Ctrl + Shift + 0	-
Call Handling	Make New Call	Ctrl + Alt + O	-
	Direct Transfer Call	Ctrl + Alt + Q	-
	Open Keypad (DTMF)	Ctrl + Alt + K	-
	Open Consult	Ctrl + Alt + C	-
	Wrap-Up Call	Ctrl + Alt + W	-
	Reclassify Call	Ctrl + Alt + Y	-
	Schedule Callback	Ctrl + Alt + S	-
	Answer/Accept Call	Ctrl + Alt + A	Use the shortcut key in the following scenarios: <ul style="list-style-type: none"> <li>Answers an incoming call</li> <li>Accepts an Outbound Option or Direct Preview call</li> </ul>

<b>Group</b>	<b>Action</b>	<b>Shortcut Key</b>	<b>Notes</b>
	Close - Remove Record from Campaign	Ctrl + Alt + J	-
	Reject - Return Record to Campaign/Close this Callback	Ctrl + Alt + U	-
	End Call	Ctrl + Alt + E	Ends the last active call when there are multiple calls.
	Hold Call	Ctrl + Alt + V	Places the call that has the hold option when there are more than one call. If all calls have the Hold option, then the latest active call is placed on hold.
	Retrieve Call	Ctrl + Alt + G	Retrieves the call that has the Retrieve option when there are more than one call. If all calls have the Retrieve option, then the latest call that is placed on hold is retrieved.
	Transfer Call	Ctrl + Alt + X	-
	Conference Call	Ctrl + Alt + H	-
Desktop Chat	Toggle, Minimize and Maximize Chat Window	Ctrl + Shift + 1	-
	Open Desktop Chat	Ctrl + Shift + 3	-
Edit Call Variable	Save Edited Call Variable Values	Ctrl + Alt + M	-
	Revert Edited Call Variable Values	Ctrl + Alt + Z	-
Keyboard Shortcuts	Keyboard Shortcuts List	Ctrl + Alt + F	-

Group	Action	Shortcut Key	Notes
Navigation	Home	Ctrl + Alt + 1	The order of the shortcut key number depend on how the gadgets are arranged in your navigation bar. For example, if the <b>My History</b> gadget is the first in your navigation bar, then Ctrl + Alt + 1 opens the <b>My History</b> gadget.
	My History	Ctrl + Alt + 2	-
	My Statistics	Ctrl + Alt + 3	-
	Manage Customer	Ctrl + Alt + 4	-
Send Error Report	Send Error Report	Ctrl + Shift + 2	-
Sign Out	Sign Out	Ctrl + Alt + L	-