Common tasks Agents & Supervisors perform

Tasks include signing in and signing out of the desktop, changing your state, selecting reason codes and wrap-up reasons, and call control tasks.

- Sign In to the Finesse Desktop

- Accept Security Certificates

- Accept Certificates for Live Data Gadget

- Sign Out of the Finesse Desktop

- Change Your State

- Make a Call

- Answer a Call

- Initiate a Consult Call

- Live Data Reports

Sign In to the Finesse Desktop

Procedure

Step 1   As per your location enter the following URL in the address bar of your browser:

India: https://uccx1.india.quark.com:8445/desktop/

Dublin: https://euccx1.swiss.quark.com:8445/desktop/

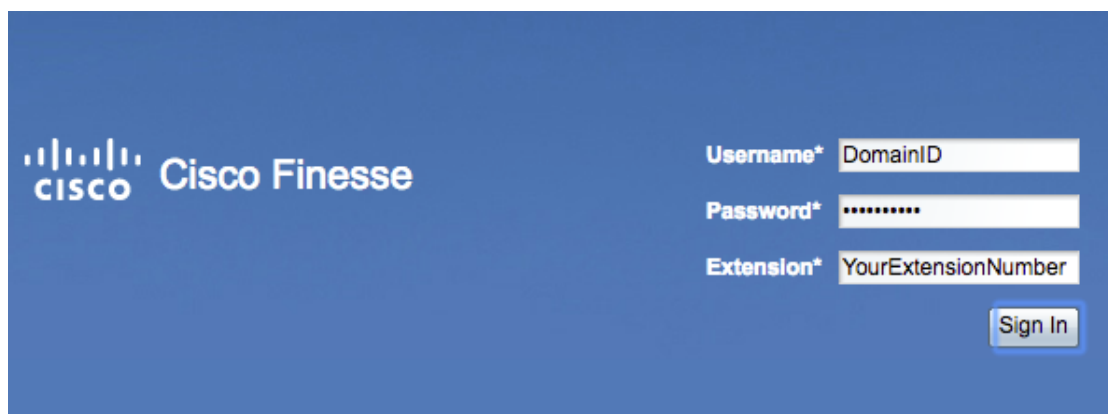US: https://usccx1.usa.quark.com:8445/desktop/

Step 2   In the **ID** field, enter your agent ID or username.
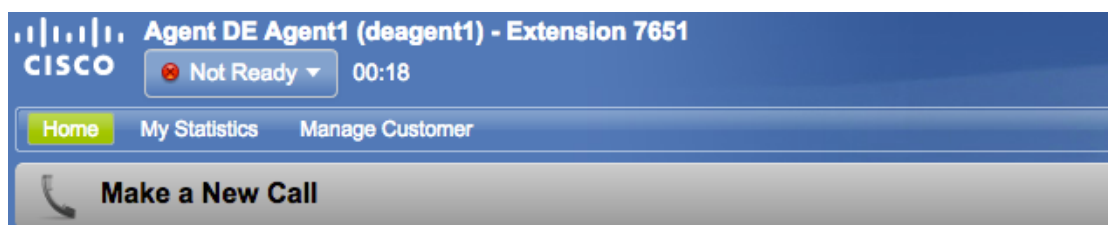**Step 3**   In the **Password** field, enter your password.
Step 4   In the **Extension** field, enter the extension of your phone.
Step 5   Click **Sign In**.

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".

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 accept instead of a browser tab.

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

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

f. On the Certificate Import Wizard, click **Next**.

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

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

i. Click **Next**.

j. Click **Finish**.

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

k. Click **Yes**.

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

l. Click **OK**.

m. Click **OK** on the Certificate dialog box.

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

After you accept all required certificates, the sign-in process completes.

Note   To remove the certificate error from the desktop, you must close and reopen your brow

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:

1. Click **Certificate error** and then click **View Certificates** to open the Certificate dialog box.
2. On the Certificate dialog box, click **Install Certificate** to open the Certificate Import Wizard.
3. On the Certificate Import Wizard, click **Next**.
4. Select **Place all certificates in the following store**, and then click **Browse**.
5. Select **Trusted Root Certification Authorities**, and then click **OK**.
6. Click **Next**.
7. Click **Finish**.

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

8. Click **Yes**.

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

9. Click **OK**.
10. Click **OK** on the Certificate dialog box.
11. 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:

1. In each tab, click **I Understand the Risks**, and then click **Add Exception**.
2. Ensure the **Permanently store this exception** check box is checked.
3. 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 codes.

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

Step 3 Select the appropriate Sign Out reason code from this list.

Change Your State

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

Procedure

Step 1 Click the drop-down arrow beside your current state.

Step 2 Select the appropriate state from the list.

Your agent state changes to reflect your choice. If you are on a call and select a state, Finesse shows your current state and the pending state to which you will transition when the call ends.

Make a Call

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

Procedure

Step 1 Ensure your status is set to Not Ready (or Not Ready with the appropriate reason code).

Step 2 Click **Make a New Call**.

The panel expands to reveal the keypad and a list of phone contacts.

Step 3 Choose the contact from the list or enter the number you want to call into the dial pad.

Step 4 Click **Call**.

Step 5 To end the call, click **End**.

Answer a Call

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

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.

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 agent or supervisor that you called.
Step 4	After you consult with the agent or supervisor that you called, you can choose to end the consult call and retrieve the customer call, 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 customer call.
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 transfer the customer to the agent or supervisor you are consulting with	Click **Transfer**.

<u>Live Data Reports</u>

Access Live Data

Cisco Finesse agent and supervisor desktops provide Live Data gadget.

Live Data gadget displays information about the current state of the contact center. This gadget receives data from the real-time data source at frequent intervals.

This feature provides the following access:

- Agents can access the Live Data agent reports.
- Supervisors can access the Live Data agent and supervisor reports.

To access reports, the administrator must add and configure them in the Cisco Finesse administration console.

In Cisco Finesse agent desktop, click the **My Statistics** tab to access the reports.

In Cisco Finesse supervisor desktop, click the **Team Data** tab and **Queue Data** tab to access the reports.

Supervisor Tasks

This section describes the tasks that supervisors perform.

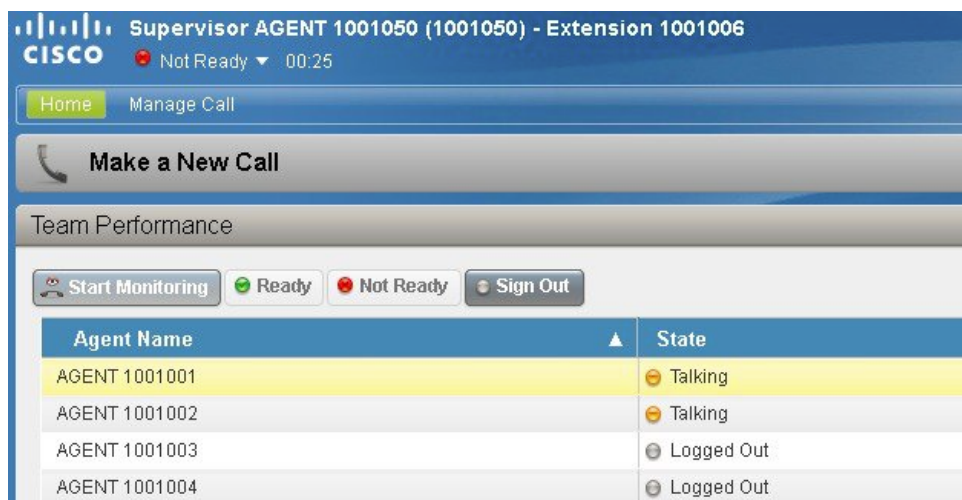- Monitor a Call

Monitor a Call

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

Procedure

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

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

The Start Monitoring button becomes active.

Step 3   Click **Start Monitoring**.

The Start Monitoring button changes to Monitoring Agent. The silent monitor call appears in the call control area of your desktop.

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