

Finesse Supervisor Desktop Training

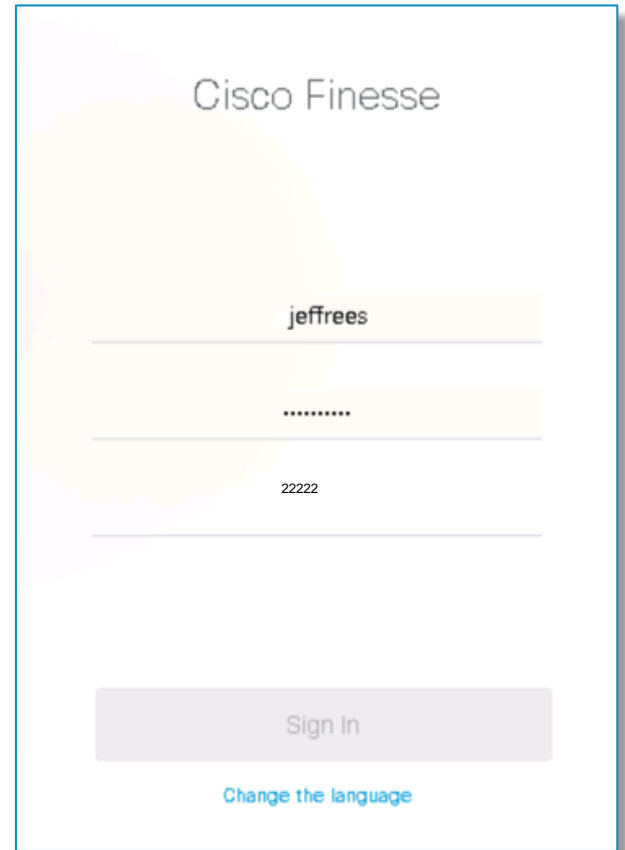
PRESIDIO[®]

Future. Built.

Finesse Agent Login

- <https://telcontactcenter1.voip.purdue.edu:8445/desktop/>
- <https://lambcontactcenter2.voip.purdue.edu:8445/desktop/>

- The **User ID** and **password** are case sensitive.
- Log in using your Finesse **User ID** and **password**.
- Use your Agent extension number.



Cisco Finesse

jeffrees

.....

22222

Sign In

[Change the language](#)

Finesse Agent Desktop

Team
Message

Dial
pad
Profile/
Sign out

Agent State

Cisco Finesse

Not Ready
00:14:58

Team Performance

Denver

Include Logged Out Agents

| Agent Name | State | Time in State | Extension | Actions |
|---------------|-------------------------------|---------------|-----------|---------|
| Brad Willis | Not Ready | 00:04:48 | 8229 | ... |
| Charlie Adams | Ready | 00:09:33 | 8225 | ... |
| Kim Brown | Not Ready - Call Not Answered | 00:01:32 | 8227 | ... |
| Joseph Smith | Ready | 00:00:11 | 8221 | ... |

Manage Team

My History

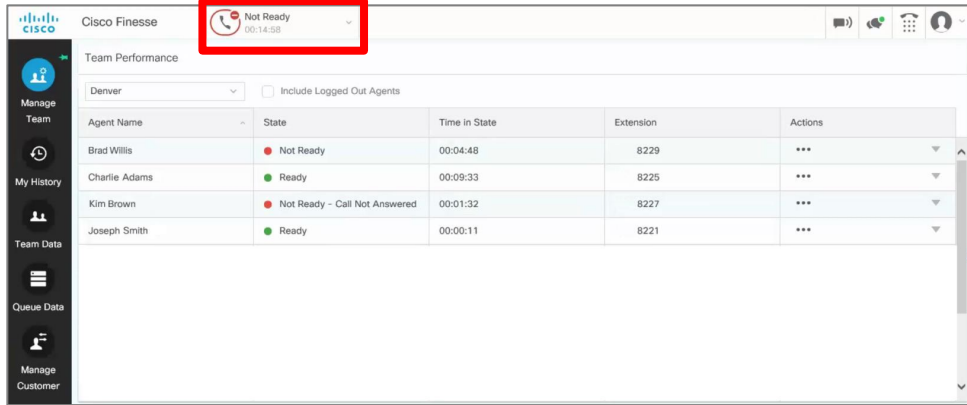
Team Data

Queue Data

Manage Customer

Team Performance

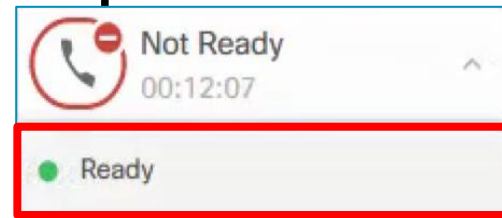
READY/NOT READY



The screenshot shows the Cisco Finesse interface. At the top, a status bar displays 'Not Ready' with a red telephone icon and a timer at 00:14:58, which is highlighted with a red box. Below this, the 'Team Performance' section is visible, showing a table of agent statuses for the 'Denver' team. The table includes columns for Agent Name, State, Time in State, Extension, and Actions.

| Agent Name | State | Time in State | Extension | Actions |
|---------------|-------------------------------|---------------|-----------|---------|
| Brad Willis | Not Ready | 00:04:48 | 8229 | ... |
| Charlie Adams | Ready | 00:09:33 | 8225 | ... |
| Kim Brown | Not Ready - Call Not Answered | 00:01:32 | 8227 | ... |
| Joseph Smith | Ready | 00:00:11 | 8221 | ... |

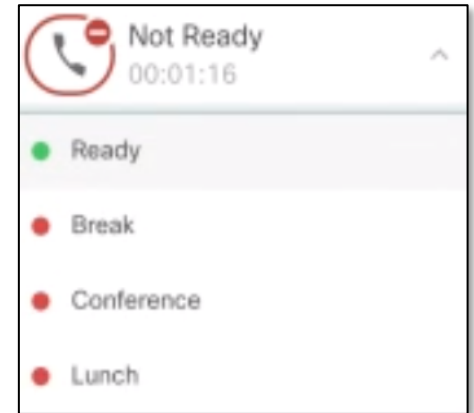
You will be signed into a **Not Ready** state. To Make yourself ready, click on pulldown tab



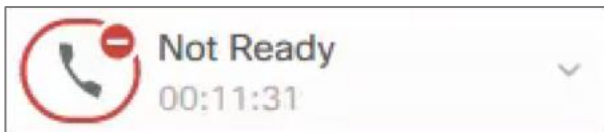
and select **Ready** .

NOT READY REASON CODES

Any time you need to change your agent state, click the pulldown tab and select **Ready** or **Not Ready**. When selecting **Not Ready**, you will need to select a **Reason Code** for that state.



Agent States



Not Ready: When agent is unable to take a queue call, he/she will select **Not Ready** and the reason code.



Ready: If an agent is available for queue calls, he/she will select **Ready**.



Reserved: Indication that agent has been selected to take the next call.

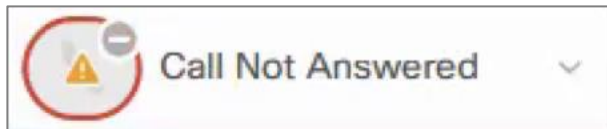
Agent States



Talking: Indicates that agent is on an active call.




Wrap-Up: When queue calls are completed, a **x**-second work timer will give agent time to finish up the with previous call's paperwork and prepare desk top for next call.



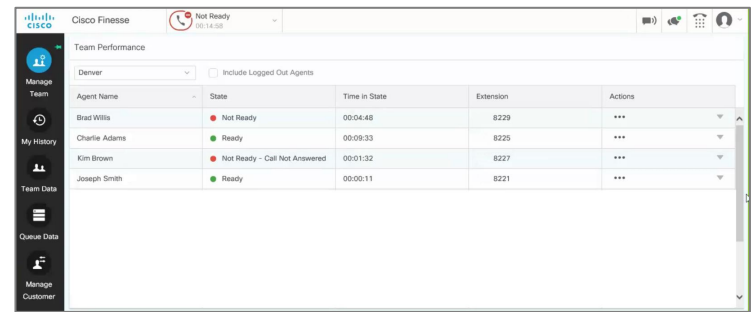
Calls Not Answered: If an agent misses a queue call without putting himself/herself in **Not Ready**, Calls Not Answered will appear as the agent state.

Selecting a Team



From the **Manage Team**  tab, select dropdown list in the **Team Performance** area. This will allow each supervisor to select which team he/she will be monitoring.

Managing Teams



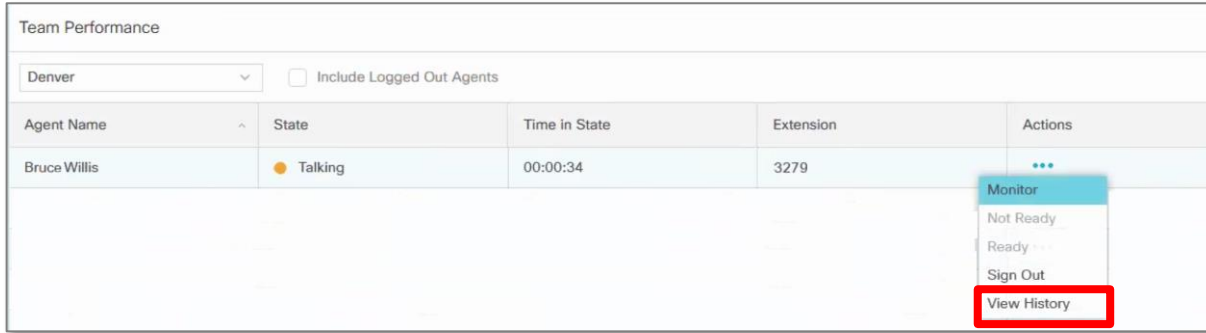
The screenshot displays the Cisco Finesse Team Performance interface. The top navigation bar includes the Cisco Finesse logo, a 'Not Ready' status indicator, and a 'Manage' button. The main content area shows a table for the 'Denver' team, with a checkbox for 'Include Logged Out Agents'. The table lists four agents with their names, states, time in state, extensions, and actions.

| Agent Name | State | Time in State | Extension | Actions |
|---------------|-------------------------------|---------------|-----------|---------|
| Brad Willis | Not Ready | 00:04:48 | 8229 | ... |
| Charlie Adams | Ready | 00:09:33 | 8225 | ... |
| Kim Brown | Not Ready - Call Not Answered | 00:01:32 | 8227 | ... |
| Joseph Smith | Ready | 00:00:11 | 8221 | ... |

Within the **Team Performance** area, you will be able to:


- Monitor each team member's current status.
- Change each team member's status to **Ready, Not Ready, Sign Out.**

Viewing Agent History



The screenshot shows a 'Team Performance' window with a table of agent data. The table has columns for Agent Name, State, Time in State, Extension, and Actions. The first row shows 'Bruce Willis' in a 'Talking' state. A dropdown menu is open in the 'Actions' column for this agent, with 'View History' highlighted by a red box.

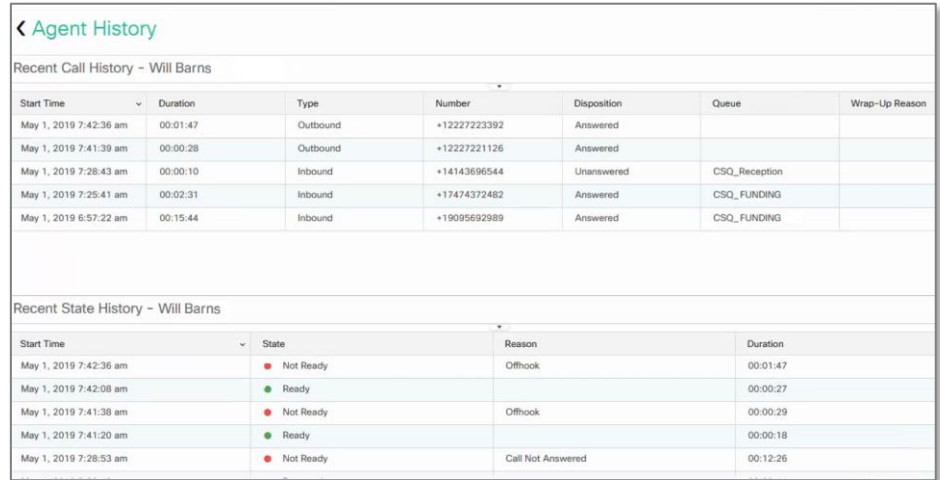
| Agent Name | State | Time in State | Extension | Actions |
|--------------|---------|---------------|-----------|---|
| Bruce Willis | Talking | 00:00:34 | 3279 | Monitor Not Ready Ready Sign Out View History |

1. In the **Team Performance** window, click on the Ellipsis  option in the **Actions** field.
2. Select **View History**.

Viewing Agent History

You will see details of the agents

Recent Call History and the agent's **Recent State History**.



The screenshot displays the 'Agent History' interface for Will Barns. It is divided into two main sections: 'Recent Call History' and 'Recent State History'. Both sections include a table of activity.

Recent Call History - Will Barns


| Start Time | Duration | Type | Number | Disposition | Queue | Wrap-Up Reason |
|------------------------|----------|----------|--------------|-------------|---------------|----------------|
| May 1, 2019 7:42:36 am | 00:01:47 | Outbound | +12227223392 | Answered | | |
| May 1, 2019 7:41:39 am | 00:00:28 | Outbound | +12227221126 | Answered | | |
| May 1, 2019 7:28:43 am | 00:00:10 | Inbound | +14143696544 | Unanswered | CSQ_Reception | |
| May 1, 2019 7:25:41 am | 00:02:31 | Inbound | +17474372482 | Answered | CSQ_FUNDING | |
| May 1, 2019 6:57:22 am | 00:15:44 | Inbound | +19095692989 | Answered | CSQ_FUNDING | |

Recent State History - Will Barns

| Start Time | State | Reason | Duration |
|------------------------|-----------|-------------------|----------|
| May 1, 2019 7:42:36 am | Not Ready | Offhook | 00:01:47 |
| May 1, 2019 7:42:08 am | Ready | | 00:00:27 |
| May 1, 2019 7:41:38 am | Not Ready | Offhook | 00:00:29 |
| May 1, 2019 7:41:20 am | Ready | | 00:00:18 |
| May 1, 2019 7:28:53 am | Not Ready | Call Not Answered | 00:12:26 |

Changing Agent State

| | | | | |
|-------------|--|----------|------|---|
| Leo Schwann | ● Not Ready - Agent Logon | 00:29:44 | 2222 | ⋮ |
| | | | | <div style="border: 1px solid red; padding: 5px;"><ul style="list-style-type: none">MonitorNot ReadyReadySign OutView History</div> |

1. In the **Team Performance** window, click on the Ellipsis  option in the **Actions** field.
2. Click on **Ready**, **Not Ready** or **Sign Out** to change the agent's state.

Viewing Agent Caller Information




The screenshot displays a call information window for agent Bruce Willis. The window is divided into several sections. At the top, there is a header bar with the following information: Agent Name (Bruce Willis), Status (Talking, indicated by a yellow dot), Duration (00:00:33), and a numeric value (3333). To the right of this bar is a red-bordered button containing a small upward-pointing arrow. Below the header bar, the main content area is split into two columns. The left column contains: Queue : CSQ_UCS, Active Participants : +17784770737, Held Participants : -, Duration : 00:00:33, Call Status : Active, and Queue Name : CSQ_UCS. The right column contains: Queue : CSQ_UCS and Customer Number : +17784770737.


In the **Team Performance** window, while an agent is talking on a call, you can click on the arrow button on the right side of the agent information line. This will tell you the caller and queue information.

My History

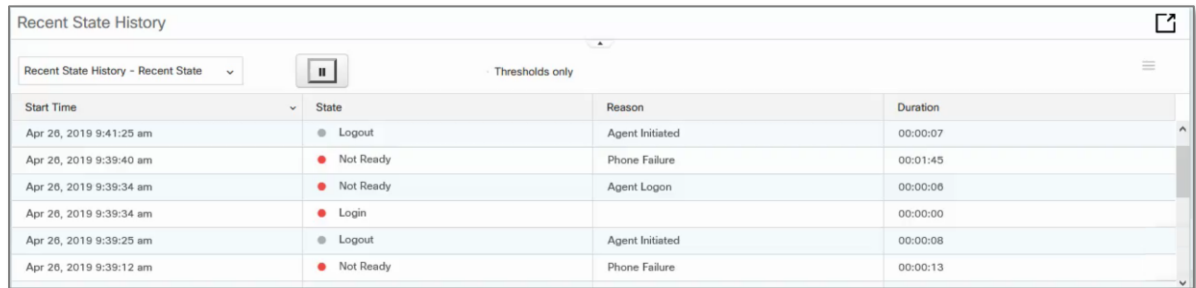


| Type | Number | Disposition | Wrap-Up Reason | Queue | Start Time | Duration | Actions |
|----------|--------------|-------------|----------------|-------|-------------------------|----------|---|
| Outbound | +16784570137 | Unanswered | | | Apr 26, 2019 9:56:09 am | 00:00:13 |  |

To view your **Recent Call History** open the **My History**  tab. You will see inbound and outbound calls. To return the call:

1. Click on the green handset  icon. A dial pad will appear with the telephone number prepopulated in the dial box.
2. Select **Enter** or **Return** on your keyboard.

My History



The screenshot shows a 'Recent State History' window with a table of agent activity. The table has four columns: Start Time, State, Reason, and Duration. The data rows are as follows:

| Start Time | State | Reason | Duration |
|-------------------------|-------------|-----------------|----------|
| Apr 26, 2019 9:41:25 am | ● Logout | Agent Initiated | 00:00:07 |
| Apr 26, 2019 9:39:40 am | ● Not Ready | Phone Failure | 00:01:45 |
| Apr 26, 2019 9:39:34 am | ● Not Ready | Agent Logon | 00:00:06 |
| Apr 26, 2019 9:39:34 am | ● Login | | 00:00:00 |
| Apr 26, 2019 9:39:25 am | ● Logout | Agent Initiated | 00:00:08 |
| Apr 26, 2019 9:39:12 am | ● Not Ready | Phone Failure | 00:00:13 |

Recent State History shows:

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

Team Data

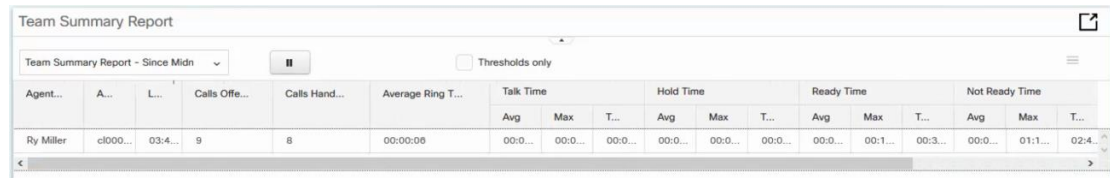
The screenshot shows the 'Team Summary Report' interface. A red box highlights the dropdown menu in the toolbar, which is labeled 'Report Options' with a red arrow. Another red box highlights the pull-down arrow in the toolbar, labeled 'Open Report Options' with a red arrow. The report title is 'Team Summary Report - Since Midn'. Below the toolbar is a table with columns for Agent, Calls Off, Calls Handled, Average Ring Time, Talk Time, Hold Time, Ready Time, and Not Ready Time. The first row of data is for 'Ry Miller'.

| Agent... | A... | L... | Calls Off... | Calls Hand... | Average Ring T... | Talk Time | | | Hold Time | | | Ready Time | | | Not Ready Time | | |
|-----------|----------|---------|--------------|---------------|-------------------|-----------|---------|---------|-----------|---------|---------|------------|---------|---------|----------------|---------|---------|
| | | | | | | Avg | Max | T... | Avg | Max | T... | Avg | Max | T... | Avg | Max | T... |
| Ry Miller | cl000... | 03:4... | 9 | 8 | 00:00:06 | 00:0... | 00:0... | 00:0... | 00:0... | 00:0... | 00:0... | 00:0... | 00:1... | 00:3... | 00:0... | 01:1... | 02:4... |

Team Data  tab displays two **Team Summary Reports**. To access reports:

1. Click on toolbar pulldown arrow in the middle of your Finesse screen.
2. Under **Team Summary Report** click on pulldown arrow to see the available reports.

Team Data



| Agent... | A... | L... | Calls Offe... | Calls Hand... | Average Ring T... | Talk Time | | | Hold Time | | | Ready Time | | | Not Ready Time | | |
|-----------|----------|---------|---------------|---------------|-------------------|-----------|---------|---------|-----------|---------|---------|------------|---------|---------|----------------|---------|---------|
| | | | | | | Avg | Max | T... | Avg | Max | T... | Avg | Max | T... | Avg | Max | T... |
| Ry Miller | cl000... | 03:4... | 9 | 8 | 00:00:00 | 00:0... | 00:0... | 00:0... | 00:0... | 00:0... | 00:0... | 00:0... | 00:1... | 00:3... | 00:0... | 01:1... | 02:4... |

Since Midnight report will give you information about:

- How long the agent has been logged in and duration in the different ready/not ready states.
- How many calls have been offered and how many calls were answered.
- Ring time, talk time and hold time.

Team Data

Report Options




The screenshot shows a web interface for a 'Team Summary Report'. A red box highlights the dropdown menu 'Team Summary Report - Short and L'. Below the dropdown is a table with columns for Agent Name, Agent ID, Login Duration, Average Talk Time (Short Term, Long Term), and Average Hold Time (Short Term, Long Term). The data row shows Agent 'Ry Miller' with Agent ID 'c1000rymill', Login Duration '03:41:27', Average Talk Time Short Term '00:00:00', Average Talk Time Long Term '00:02:25', Average Hold Time Short Term '00:00:00', and Average Hold Time Long Term '00:01:46'.

| Agent Name | Agent ID | Login Duration (since ...) | Average Talk Time | | Average Hold Time | |
|------------|-------------|----------------------------|-------------------|-----------|-------------------|-----------|
| | | | Short Term | Long Term | Short Term | Long Term |
| Ry Miller | c1000rymill | 03:41:27 | 00:00:00 | 00:02:25 | 00:00:00 | 00:01:46 |

Short and Long Term Average shows:

- **Login Duration.**
- **Average Talk Time** – **Short Term** (last 5, 10 or 15 minutes) **Long Term** (last 30 minutes).
- **Average Hold Time** – **Short Term** (last 5, 10 or 15 minutes) **Long Term** (last 30 minutes).

Queue Data

Queue Data  tab displays four **Voice CSQ Summary Reports**. These reports will allow supervisors to get an overview of the statistics for all the teams they manage.

Queue Data

| CSQ Name | Waiting Calls | Longest Call in ... | Agents Logged... | Agents Talking | Agents Ready | Agents Not Ready | Agents in After... | Agents Reserved |
|---------------|---------------|---------------------|------------------|----------------|--------------|------------------|--------------------|-----------------|
| CSQ_Lender | 0 | 00:00:00 | 1 | 0 | 0 | 1 | 0 | 0 |
| CSQ_Reception | 0 | 00:00:00 | 1 | 0 | 0 | 1 | 0 | 0 |
| CSQ_UCS | 0 | 00:00:00 | 1 | 0 | 0 | 1 | 0 | 0 |

Snapshot report will give you information about:

- Calls in queue – waiting and longest call in queue.
- Agents logged in, talking, Ready/Not Ready, after work status and Reserved.

Queue Data

| CSQ Name | Waiting Calls | Abandoned Calls | Handled Calls | Total Calls | Longest Call in Queue | Longest Handle Time |
|---------------|---------------|-----------------|---------------|-------------|-----------------------|---------------------|
| CSQ_Lender | 0 | 0 | 0 | 0 | 00:00:00 | 00:00:00 |
| CSQ_Reception | 0 | 0 | 2 | 2 | 00:00:08 | 00:00:22 |
| CSQ_UCS | 0 | 0 | 6 | 6 | 00:00:27 | 00:02:25 |

Since Midnight report will give you information about:

- Calls waiting in queue.
- Abandoned, handled calls, total calls.
- Longest call in queue and longest handle time.

Queue Data

| CSQ Name | Calls Abandoned | | Calls Dequeued | | Average Contact Handling Time | | Average Waiting Duration | | Service Level | |
|---------------|-----------------|-----------|----------------|-----------|-------------------------------|-----------|--------------------------|-----------|---------------|-----------|
| | Short Term | Long Term | Short Term | Long Term | Short Term | Long Term | Short Term | Long Term | Short Term | Long Term |
| CSQ_Lender | 0 | 0 | 0 | 0 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 0.00 | 0.00 |
| CSQ_Reception | 0 | 0 | 0 | 0 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 100.00 | 50.00 |
| CSQ_UCS | 0 | 0 | 0 | 0 | 00:00:00 | 00:04:11 | 00:00:00 | 00:00:09 | 0.00 | 0.00 |

Short (last 5, 10 or 15 minutes) and **Long Term** (last 30 minutes) **Average** report will give you information about:

- Abandoned and dequeued calls.
- Call handle times.
- Calls waiting in queue duration.
- Service levels (if programmed by administrator).

Queue Data

| CSQ Name | Waiting Calls | Abandoned Calls | Handled Calls | Total Calls | Longest Call in Queue | Longest Handle Time |
|---------------|---------------|-----------------|---------------|-------------|-----------------------|---------------------|
| CSQ_Lender | 0 | 0 | 0 | 0 | 00:00:00 | 00:00:00 |
| CSQ_Reception | 0 | 0 | 2 | 2 | 00:00:08 | 00:00:22 |
| CSQ_UCS | 0 | 0 | 6 | 6 | 00:00:27 | 00:02:25 |

CSQ Agent Detail report will give you information showing each queue and every agent in the queue. The information shown is:

- Agent Name and ID.
- Current state such as logged in or out, ready/not ready, reserved, talking or in after work time - with reason and duration

Call Handling – Answering a Call

The screenshot displays the Cisco Finesse interface. At the top, it shows 'Cisco Finesse' and a 'Reserved' status. Below this, there are two main sections: 'Recent Call History' and 'Recent State History'. The 'Recent Call History' table has columns for Type, Number, Disposition, Wrap-Up Reason, Queue, Start Time, Duration, and Actions. The 'Recent State History' table has columns for Start Time, State, Reason, and Duration. At the bottom right, an 'Incoming Call from +17777330097' notification is highlighted with a red box. This notification includes a call icon, a timer showing '00:00', and a green 'Answer' button.

| Type | Number | Disposition | Wrap-Up Reason | Queue | Start Time | Duration | Actions |
|----------|--------------|-------------|----------------|-------|-------------------------|----------|---------|
| Outbound | +16777770137 | Unanswered | | | Apr 26, 2019 9:56:09 am | 00:00:13 | |

| Start Time | State | Reason | Duration |
|-------------------------|-----------|-----------------|----------|
| Apr 26, 2019 9:41:33 am | Not Ready | Agent Logon | 00:17:15 |
| Apr 26, 2019 9:41:33 am | Login | | |
| Apr 26, 2019 9:41:25 am | Logout | Agent Initiated | 00:00:00 |
| Apr 26, 2019 9:39:40 am | Not Ready | Phone Failure | |
| Apr 26, 2019 9:39:34 am | Not Ready | Agent Logon | |
| Apr 26, 2019 9:39:34 am | Login | | |

An incoming queue call will appear at the bottom of your screen. To answer the call, click **Answer**.

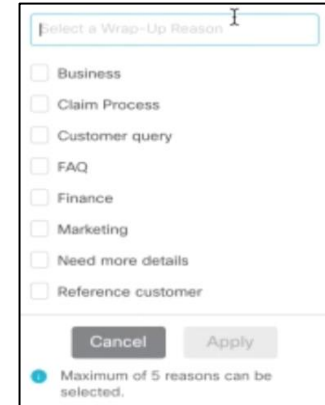
Call Handling – Wrap-up Code



Some centers require a wrap-up code to define the purpose of the call. Assign this code soon after answering the call. Once call is completed you will not be able to assign a code.

Call Handling – Wrap-up Code

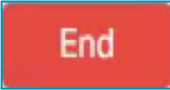
1. In call control area, click on pulldown arrow next to **Wrap-Up (0) ^**.
2. Choose from code options or use search window to find a code.
3. Click Apply. You will see a green check and number of codes near the Wrap-up **Wrap-Up (2) v** button.



The screenshot shows a dialog box titled "Select a Wrap-Up Reason". It contains a search input field at the top. Below it is a list of seven options, each with an unchecked checkbox: "Business", "Claim Process", "Customer query", "FAQ", "Finance", "Marketing", and "Reference customer". At the bottom of the dialog, there are two buttons: "Cancel" and "Apply". Below the buttons, there is a small blue circle icon followed by the text "Maximum of 5 reasons can be selected."

Call Handling – Ending a Call



A call handling bar, with queue information as well as caller ID, will appear at the top of the Finesse screen. To end the call, click .

Call Handling – Hold/Retrieve

- To place a call on hold, click .



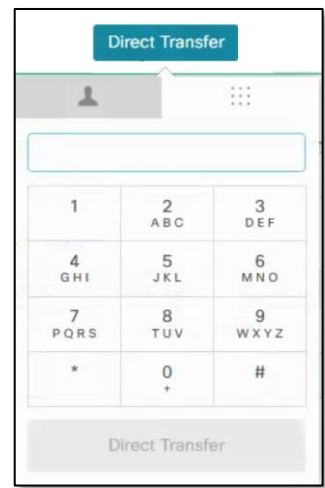
- To take the caller off hold, click .



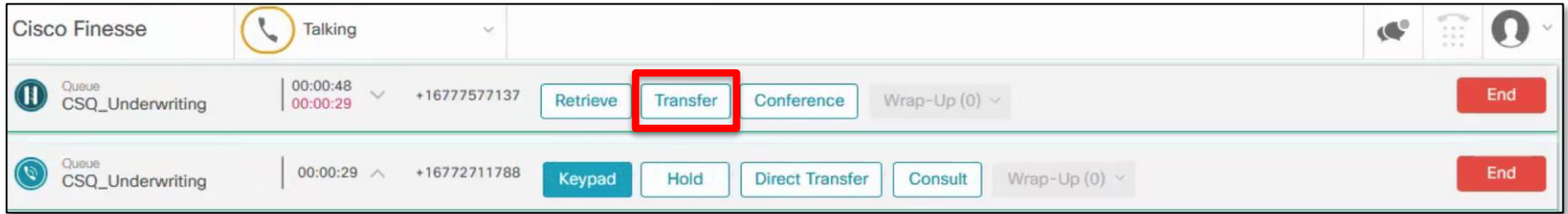
Call Handling – Direct Transfer

To conduct a direct transfer:

1. Click **Direct Transfer**.
2. Use the keypad to dial the number to whom you wish to transfer the call.
3. Click **Direct Transfer** again. Call will be immediately transferred.



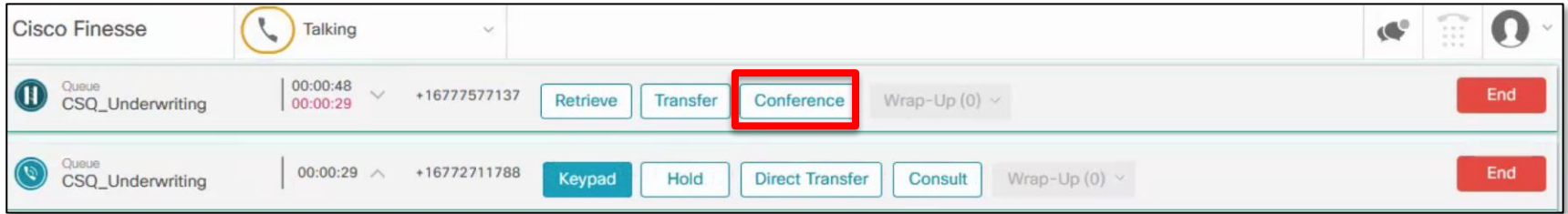
Call Handling – Consultative Transfer



To conduct a consultative transfer:

1. Click **Consult**.
2. Use the keypad to dial the number to whom you wish to transfer the call.
3. Announce the call and then to complete the transfer, select **Transfer**.

Call Handling – Conference




To orchestrate a conference call:

1. Click **Consult**.
2. Use the keypad to dial the internal or external number of whom you wish to add to the conference.
3. Announce the call and then select **Conference**.

Note: You can have up to **x** parties in your call.

Sign Out

To sign out:

1. You must put yourself in **Not Ready** or you will see **Sign Out** as grayed out.
2. Pull down arrow near your avatar .
3. Click **Sign Out**.

