Cisco Finesse Agent Desktop User Guide

1.0 LOGGING INTO CISCO FINESSE AGENT DESKTOP

1. Open a web browser and type in the following URL: https://ccx01.v.utsa.edu:8445/
2. Enter your myUTSA ID and Passphrase.
3. Enter your Agent ID (Extension Number)
4. Click Sign In

Note: When you log into the Finesse Agent Desktop, you will automatically be placed in a Not Ready state.

2.0 CHANGING TO A READY/NOT READY STATE

1. Click the Drop-Down arrow next to the Not Ready state at the top of the screen.
2. To receive Inbound Queue calls, select Ready.
3. To stop receiving Inbound Queue calls, select Not Ready and the Reason Code that applies.

The following Reason Codes are to be used when going into a Not Ready state:

<table>
<thead>
<tr>
<th>Code</th>
<th>Reason Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Break</td>
<td>Used when taking a break from work activities, includes 15 minute breaks and personal breaks.</td>
</tr>
<tr>
<td>2</td>
<td>Admin</td>
<td>Used when conducting administrative or other assigned work duties.</td>
</tr>
<tr>
<td>3</td>
<td>Lunch</td>
<td>Used when taking required or requested meal break(s).</td>
</tr>
<tr>
<td>4</td>
<td>End of Shit</td>
<td>Used at the end of work shift.</td>
</tr>
<tr>
<td>5</td>
<td>Conference Call</td>
<td>Used when in a work-related conference call or Webex.</td>
</tr>
<tr>
<td>6</td>
<td>Meeting</td>
<td>Used when attending a work-related meeting.</td>
</tr>
<tr>
<td>7</td>
<td>Technical Issues</td>
<td>Used when experiencing computer issues that will not allow you to perform normal job duties.</td>
</tr>
<tr>
<td>8</td>
<td>Training</td>
<td>Used when attending work-related training, either online or in person.</td>
</tr>
<tr>
<td>9</td>
<td>Email</td>
<td>Used when checking and sending work-related email.</td>
</tr>
<tr>
<td>10</td>
<td>Emergency/Evacuation</td>
<td>Used when emergency or drill requires evacuation of building.</td>
</tr>
</tbody>
</table>
3.0 ANSWERING AND ENDING A CALL

You can receive queue calls and calls to your personal extension through the Finesse Agent Desktop. You must be logged in and in a Ready state to receive Inbound Queue or routed calls. You may be in either a Ready or Not Ready state to receive calls to your personal extension. Inbound Queue calls are incoming calls that are automatically distributed to specific resources (agents) in a Call Center.

1. You will see an incoming pop up box at the bottom of your screen when a new call is presented. It will include caller ID information and which queue the call is originating from.
2. To answer the call, click Answer.
3. To end the call, click End.

4.0 PLACING A CALL ON HOLD

1. To place a call on hold, click Hold.
2. To take the caller off hold, click Retrieve.
5.0 TRANSFERRING A CALL

5.1 COLD TRANSFER

1. To transfer a caller without waiting for the other person to answer, click Direct Transfer.
2. Dial the desired 4-digit extension.
3. The call will be transferred immediately.

5.2 WARM TRANSFER

1. To transfer a call you wish to announce to the other person, click Consult.
2. Wait for the other person to answer, then announce the call.
3. Press Transfer to complete the transfer.

6.0 CONFERENCING A CALL

1. To add another party to an active call, click Consult, then dial the number you wish to add.
2. Click Conference, to merge all calls together.

*Warning:* Caller does not get placed on hold when Consult is selected. The caller will be able to hear you while you are dialing the number. The caller is placed on hold after the number is dialed.

7.0 WRAP-UP

1. Before completing a call or transfer, select the Drop Down arrow near Wrap Up.
2. Select the appropriate Wrap Up reason to classify the nature of the call.

The following Wrap Up Codes are to be used in classifying calls:

<table>
<thead>
<tr>
<th>Code</th>
<th>Wrap-Up Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Transferred to One-Stop</td>
<td>Calls that were transferred to the One-Stop Enrollment Center.</td>
</tr>
<tr>
<td>2</td>
<td>Transferred to Advising</td>
<td>Calls that were transferred to an Advising Center.</td>
</tr>
<tr>
<td>3</td>
<td>Transferred to Help Desk</td>
<td>Calls that were transferred to the Help Desk.</td>
</tr>
<tr>
<td>4</td>
<td>Transferred to Faculty/Staff</td>
<td>Calls that were transferred to a specific Faculty or Staff member.</td>
</tr>
<tr>
<td>5</td>
<td>Transferred to Other Dept</td>
<td>Calls that were transferred to any other department.</td>
</tr>
<tr>
<td>6</td>
<td>Directions</td>
<td>Calls in which directions were provided.</td>
</tr>
<tr>
<td>7</td>
<td>Parking Information</td>
<td>Calls requesting parking-related information, provided or transferred.</td>
</tr>
<tr>
<td>8</td>
<td>General Question</td>
<td>Calls in which a general question was answered by the Operator.</td>
</tr>
<tr>
<td>9</td>
<td>Telemarketer</td>
<td>Calls that originated from a telemarketer.</td>
</tr>
<tr>
<td>10</td>
<td>Other</td>
<td>Calls that do not fall into a category of another reason code.</td>
</tr>
</tbody>
</table>
8.0 INITIATING A CALL USING CISCO FINESSE AGENT DESKTOP

1. Click on the Dial Pad at the top right of your Finesse Desktop.
2. Dial the digits using your computer’s mouse or by using the number keys on your keyboard.
3. Click Call.

Note: You may also copy and paste numbers for dialing.

9.0 QUEUE AND TEAM STATUS

The Cisco Finesse Agent Desktop allows each agent to monitor calls in queue as well as their team status.

9.1 AGENT CSQ STATUS REPORT

- The Agent CSQ Statistics Report on the Home Page, gives each agent a count of the number of callers waiting in the queue.
- It also shows the longest time a caller has been waiting in the queue.

9.2 AGENT TEAM SUMMARY REPORT

- The Agent Team Summary Report on the Home Page, shows each team member’s state and the reason code for team members in a Not Ready state.
10.0 MY HISTORY

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

10.1 RECENT CALL HISTORY

- Shows inbound calls on Agent Contact Center Queue extension
- Shows outbound calls on Agent Contact Center Queue extension

Note: You can place a call from the call history information by clicking on the green handset next to the historical call information. A dial pad with the telephone number prepopulated will appear on your screen.

10.2 RECENT STATE HISTORY

- **State** – Agent’s state (Logged-In, Logged-Out, 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
11.0 AGENT STATISTICS/PERFORMANCE REPORTS

- **Calls Offered** – All queue calls that were presented to the agent’s extension.
- **Calls Handled** – All queue calls that were answered by the agent.
- **Talk Time** – Average, Maximum, and Total time agent spoke to callers.
- **Hold Time** – Average, Maximum, and Total time agent had callers on hold.
- **Ready** – Average, Maximum, and Total time agent was in Ready state.
- **Not Ready** – Average, Maximum, and Total time agent was in Not Ready state.
- **After Call Work** – Average, Maximum, and Total time agent was in Wrap Up state. After Call Work can be customized to automatically allow agents a designated amount of time to finish work from a previous call before being presented with a new call.

12.0 LOGGING OFF CISCO FINESSE AGENT DESKTOP

1. Place yourself in Not Ready state by selecting Reason Code *End of Shift*.
2. Click on Drop Down arrow near your profile avatar.
3. Click *Sign Out*.