Cisco Finesse Supervisor Desktop User Guide

0.0 STARTING JABBER AND LOGGING INTO VPN

1. Start the Jabber application and ensure Phone Services is connected. You will see a green monitor icon at the bottom of the left pane where your extension is to indicate you are connected. (Note: Click on the following link for instructions on logging into and setting up Jabber for the first time: https://www.utsa.edu/oit/ImagesAndPDF/pdf/Telecommuter-Jabber-Log-In-Instructions.pdf.)

2. Connect to the UTSA VPN by going to http://vpn.utsa.edu or by connecting via the Client.

1.0 LOGGING INTO CISCO FINESSE AGENT DESKTOP

1. After you have successfully connected to the VPN, 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 SELECTING A TEAM

1. Click the Manage Team tab on the left pane.

2. Click the Drop Down arrow in the Team Performance area.

3. Select the team you wish to monitor.
3.0 MANAGING TEAMS

From within the Team Performance area, you will be able to:

- Monitor team members’ current status.
- Change team members’ status to Ready, Not Ready, and Sign Out.
- Conduct silent monitoring of team members’ queue calls.
- View agents’ Recent Call History and Recent State History.

3.1 VIEWING AGENT HISTORY

1. In the Team Performance window, click on the ellipsis option in the Actions field.
2. Select View History. You will see details of their Recent Call History and Recent State History.
3.2 CHANGING AGENT STATE

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.

3.3 VIEWING AGENT’S ACTIVE CALL

1. Click on the Drop Down arrow to the right of the ellipsis for an agent that is currently in a Talking state to view the active call information.
4.0 TEAM DATA

4.1 TEAM SUMMARY REPORT

Real-time report shows individual agent’s:

- Login Duration
- Calls Offered – All queue calls that are presented to the agent’s phone
- Calls Handled – All queue calls that the agent answered.
- Average Ring Time – Average time calls rang before being answered by agent
- Talk Time – Average, Maximum, and Total time agents talked to callers
- Hold Time – Average, Maximum, and Total time agents placed calls on hold
- Ready – Average, Maximum, and Total time agents were in Ready state
- Not Ready – Average, Maximum, and Total time agents were in Not Ready state
- After Call Work – Average, Maximum, and Total time agents were in Wrap Up state
4.2 TEAM SUMMARY REPORT – SHORT AND LONG-TERM AVERAGE

Real-time report shows each individual agent’s statistics for:

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

5.0 QUEUE DATA

5.1 VOICE CSQ SUMMARY REPORT – SNAPSHOT

Real-time report gives the following data for each queue you are monitoring:

- Contact Service Queue Name
- Calls Waiting – Number of calls waiting in queue
- Longest Call in Queue – Elapsed wait time of the longest call in the queue
- Number of Agents Logged In
- Number of Agents Talking
- Number of Agents in Ready state
- Number of Agents in Not Ready state
- Number of Agents in After Call Work
- Number of Agents in Reserved status
5.2 VOICE CSQ AGENT DETAIL REPORT – SINCE MIDNIGHT

Real-time report gives the following data for each queue you are monitoring:

- Contact Service Queue Name
- Waiting Calls
- Abandoned Calls
- Handled Calls – Number of calls answered by all agents within a queue
- Total Calls – Total number of calls that are presented to the queue
- Longest Call in Queue – Tracks the call that was held in the queue the longest before being answered
- Longest Handle Time – Longest talk time of any agent within the queue

5.3 VOICE CSQ AGENT DETAIL REPORT – SHORT AND LONG-TERM AVERAGE

Real-time report gives the following data for each queue you are monitoring:

- Contact Service Queue Name
- Waiting Calls
- Abandoned Calls
- Handled Calls – Number of calls answered by all agents within a queue
- Total Calls – Total of calls that are presented to the queue
- Longest Call in Queue – Tracks the call that was held in the queue the longest before being answered
- Longest Handle Time – Longest talk time of any agent within the queue
5.4 VOICE CSQ AGENT DETAIL REPORT – VOICE CSQ AGENT DETAIL

Real-time report gives the following data for each queue you are monitoring

- Contact Service Queue Name
- Agent Name
- Agent ID
- Current State – Agent’s state (Logged In, Logout, Ready/Not Ready, Reserved, Talking, or Work)
- Duration – Time agent has been in current state
- Reason Code – Shows each Not Ready reason code selected throughout the day

6.0 TEAM MESSAGE

Supervisors can send a broadcast message to one or more teams. The message scrolls as a banner across the Finesse Agent Desktop.

1. Click the Team Message icon.
2. Compose a message. You may also see previous messages by clicking on Show Recent Messages.
3. Select the team or teams to which you would like to send your message.
4. Choose the duration for which you would like the message displayed.
5. Click Send.
7.0 Advanced Capabilities – Calendar Management

Supervisors have the ability to change the hours of operation, set custom business days, and preschedule Holidays.

1. Click on the Advanced Capabilities icon.
2. Click on Calendar Management on the top Toolbar.
3. Select Manage Calendar under Action.

To modify Business Hours:

1. Click on Business Hours.
2. You can select from the following options:
   a. 24 Hours x 7 Days
   b. Fixed Hours
      i. Select the Days you are open and enter the time in Range 1 in the format HH:MM AM to HH:MM PM
   c. Flexible Hours
      i. Allows you to enter hours of operation for each day Monday – Sunday
To modify Custom Business Days:

1. Click on Custom Business Days.
2. Enter a Name of the Day.
3. Enter the Date.
4. Enter the Time Range
5. Click Save.

<table>
<thead>
<tr>
<th>Name of the Day</th>
<th>Date</th>
<th>Time Range 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>04/15/2020</td>
<td>From 08:00 AM To 10:00 AM</td>
</tr>
</tbody>
</table>

Maximum of 40 Custom Business Days can be configured.

To modify scheduled Holidays:

1. Click on Holidays.
2. Enter Name of the Day.
3. Enter the Date.
4. Click Save.

<table>
<thead>
<tr>
<th>Name of the Day</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christmas Eve</td>
<td>12/24/2020</td>
</tr>
</tbody>
</table>

Maximum of 40 Holidays can be configured.
8.0 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**.