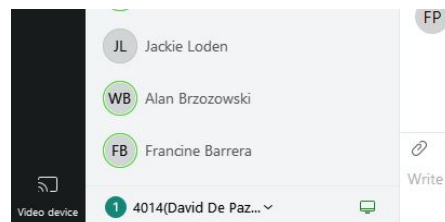


## Cisco Finesse Agent Desktop User Guide

### 0.0 STARTING JABBER AND LOGGING INTO VPN

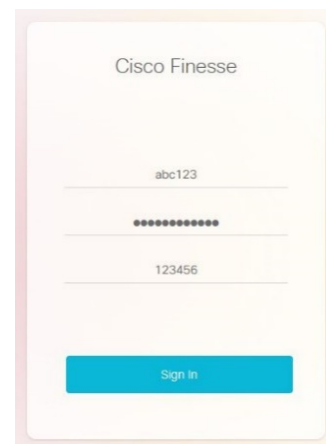
1. Start the Jabber application and ensure Phone Services is connected. You will see a green monitor icon at the bottom of the left pane where your extension is to indicate you are connected. (Note: Click on the following link for instructions on logging into and setting up Jabber for the first time: <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

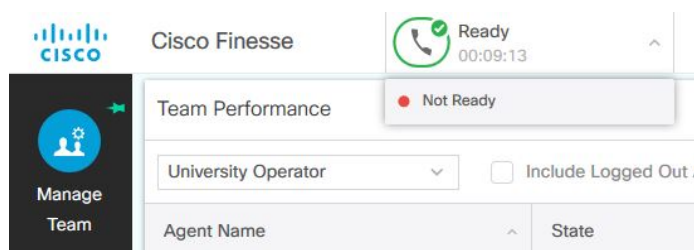
1. After you have successfully connected to the VPN, open a web browser and type in the following URL: <https://ccx01.v.utsa.edu:8445/>
2. Enter your myUTSA ID and Passphrase.
3. Enter your Agent ID (Agent Extension)
4. Click [Sign In](#)

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

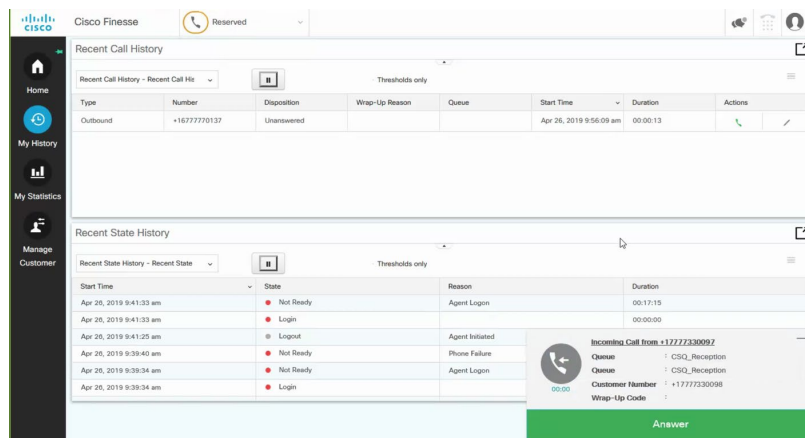
1. Click the Drop-Down arrow next to the [Not Ready](#) state at the top of the screen.
2. To receive Inbound Queue calls, select [Ready](#).
3. To stop receiving Inbound Queue calls, select [Not Ready](#) and the [Reason Code](#) that applies.



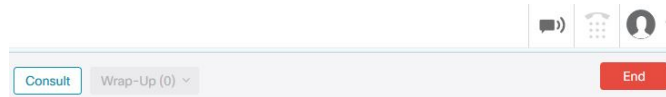
### 3.0 ANSWERING AND ENDING A CALL

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 or off-campus telephone number preceded by 9, and press Enter.
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. Dial the desired 4-digit extension or off-campus telephone number preceded by 9, and press Enter.
3. Wait for the other person to answer, then announce the call.
4. Press [Transfer](#) to complete the transfer.

## 6.0 CONFERENCING A CALL

1. To add another party to an active call, click [Consult](#).
2. Dial the desired 4-digit extension or off-campus telephone number preceded by 9, and press Enter.
3. Click [Conference](#), to merge all calls together.

**\*Warning:** Caller does not get placed on hold when Direct Transfer or 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.

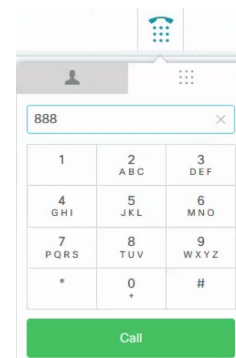
## 7.0 WRAP-UP (FEATURE MAY OR MAY NOT BE ENABLED BY YOUR DEPARTMENT)

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.

## 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.

CSQ Name	Calls Waiting	Longest Call in Queue
CSQ_Lender	0	00:00:00
CSQ_Reception	0	00:00:00
CSQ_Underwriting	0	00:00:00

### 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.

Agent Name	State	Reason
Ry Miller	Not Ready	Agent Logon



## 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

Recent Call History

Recent Call History - Recent Call His [Pause] Thresholds only

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	

### 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

Recent State History

Recent State History - Recent State [Pause] Thresholds only

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

## 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.

Calls Off...	Call...	Talk Time			Hold Time			Ready			Not Ready			After Call Work		
		Avg	Max	Total	Avg	Max	Total	Avg	Max	Total	Avg	Max	Total	Avg	Max	Total
0	0	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:04:18	00:07:28	00:28:54	00:00:00	00:00:00	00:00:00

## 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](#).

