



## **Cisco Finesse Supervisor Desktop Upgrade Training**

Revision: 0.0

**For: State of Illinois - Department of  
Innovation and Technology**

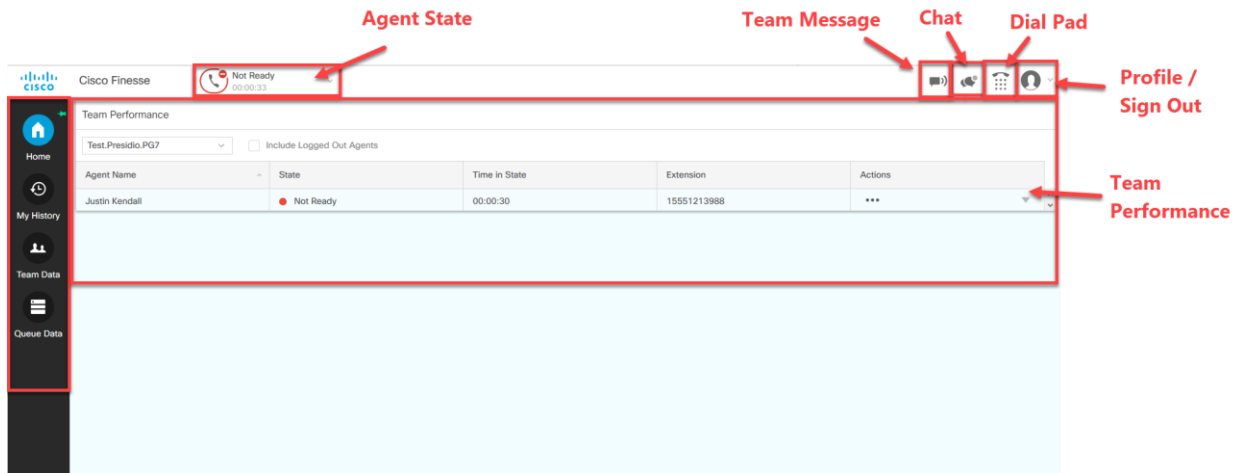
**Presidio Networked Solutions, Inc.**

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## 1.0 CISCO FINESSE SUPERVISOR DESKTOP WINDOW OVERVIEW

The Finesse Supervisor Desktop allows the supervisor to:



- View Team, Agent and Queue Performances with real-time displays of agent, team and Queue information.
- Change State of Agent to Ready, Not Ready or Sign Out.
- Monitor a Call
- Monitor calls waiting in queues

## 2.0 LOGGING INTO CISCO FINESSE SUPERVISOR DESKTOP


To log into Finesse:

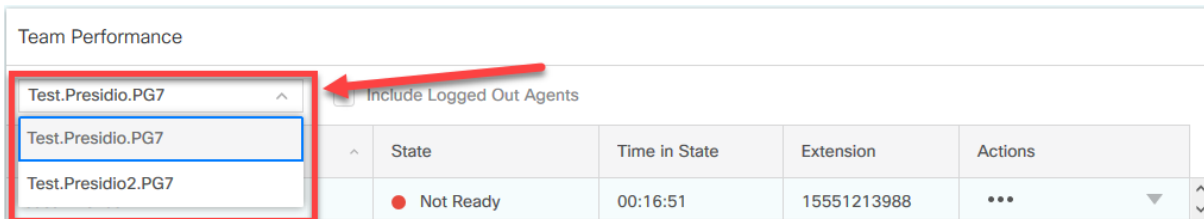
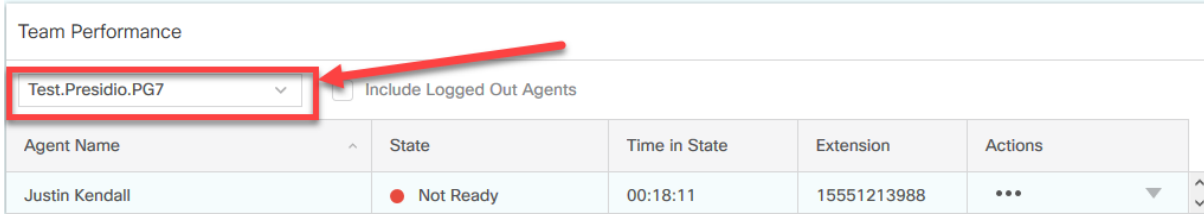
1. Open a web browser and navigate to the Finesse website assigned to your call center.
2. Log into Finesse the same way you logged into Finesse before the upgrade.

Reminder:

- The **password** is case sensitive.
- Log in using the same username and password as you always have.
- Use your **Agent extension number** (1555121xxxx)
- Click **Sign In**

### 3.0 SELECTING A TEAM

From the **Home**  tab, select dropdown list in the Team Performance area. This will allow each Supervisor to select which team they will be monitoring.



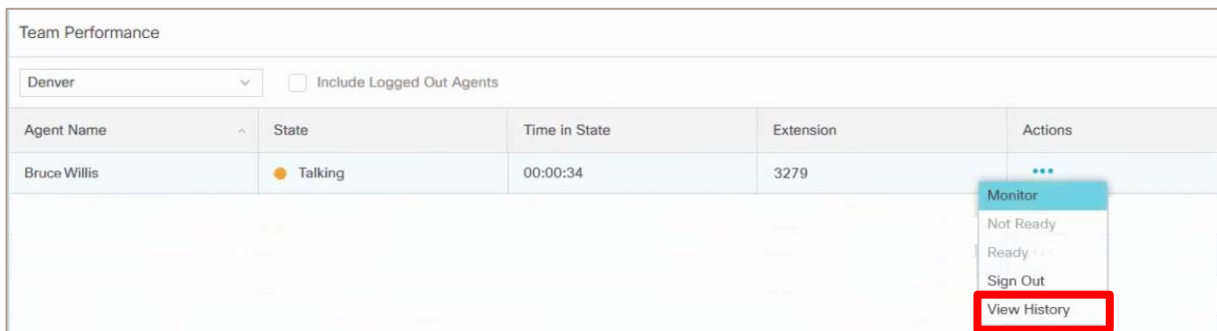
### 4.0 MANAGING TEAMS

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

- Monitor each team members' current status.
- Change each team members' status to Ready, Not Ready, Sign Out.
- Conduct Silent Monitoring of team members' queue calls.
- Select an individual agent and view that agent's Recent Call History and Recent State History.

**Note:** This is real-time reporting, updated about every 30 seconds.

#### 4.1 Viewing Agent History



1. In the **Team Performance** gadget, click on the “ ●●● ” in the Actions field.
2. Select **View History**. You will see details of their Recent Call History and their Recent State History.

**< Agent History**

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

## 4.2 Changing Agent State

Leo Schwann	● Not Ready - Agent Logon	00:29:44	2222	⋮
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- Monitor
- Not Ready
- Ready
- Sign Out
- View History

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

## 4.3 Current Call Details

As a supervisor, you can also now see the current call context for calls that agents you supervise are handling.

While an agent is in a Talking state, select the arrow on the far right of the row for that agent.

Team Performance

Test.Presidio2.PG7  Include Logged Out Agents

Agent Name	State	Time in State	Extension	Actions
Michael_PG7 Caldwell	● Talking	00:00:12	15551213988	⋮

Source : Another Value

Active Participants : 3176603063

Held Participants : -

Duration : 00:00:12

Call Status : Active

Queue Name : Test.SMCCB.Task.In.Eng

## 4.4 Silent Monitoring, Barge, and Drop

In the **Team performance** gadget: while an agent is talking on a call, you can monitor the agent's call.


To access silent monitoring:

1. Click on the “ ●●● ” in the Actions field.



Agent Name	State	Time in State	Extension	Actions
Bruce Willis	Talking	00:00:34	88883279	*** Monitor Not Ready Ready Sign Out View History

2. Select **Monitor**. The silent monitor call will appear in the call control area of the Finesse desktop. You will hear the call from your desk phone or your softphone.
3. You will see the following options in the call control area:
  - **Hold**: Places the call on hold
  - **Retrieve**: Retrieves the call placed on hold
  - **Barge In**: Allows you to barge in on a call. You must start with silent monitoring before you see Barge In.
  - **Drop**: After you have barged in on a call, you will see the Drop option, which allows you to remove the agent from the call.

## 5.0 MY HISTORY

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

### 5.1 Recent Call History – Top Report

Type	Number	Disposition	Wrap-Up Reason	Queue	Start Time	Duration	Make Call
Inbound	3176603063	Handled		Test.SMCCB.Task.In.Eng	October 9, 2020 10:10:55 am	00:05:37	
Outbound	62222917658943756	Handled		PG7.UCM.Cisco_Voice.defa...	October 9, 2020 10:05:23 am	00:00:44	

This real-time report shows each individual agent's:

- Inbound calls on Agent Contact Center extension
- Outbound calls on Agent Contact Center extension

- To place a call from the call history information, click on the green handset next to the historical call information. A dial pad with the telephone number prepopulated will appear on your screen.


## 5.2 Recent State History – Bottom Report

Start Time	State	Reason	Duration
Oct 9, 2020 10:11:02 am	TALKING		00:05:33
Oct 9, 2020 10:10:59 am	RESERVED		00:00:03
Oct 9, 2020 10:10:58 am	READY		00:00:01
Oct 9, 2020 10:06:12 am	NOT_READY		00:04:45
Oct 9, 2020 10:05:23 am	TALKING		00:00:49
Oct 9, 2020 10:05:07 am	NOT_READY		00:00:15
Jul 21, 2020 11:32:28 am	LOGOUT		1918:32:39

This real-time report shows supervisor’s personal statistics for:

- State** – Supervisor’s state such as Logged-In, Logout, Ready/Not Ready, Reserved, Talking, or Work.
- Reason Code** – Shows each Not Ready reason code selected throughout the day
- Duration** – Supervisor was in each state.

## 6.0 TEAM DATA

The **Team Data**  tab displays the Agent Team Summary Report. In the center of your screen you will see a pulldown arrow. Clicking on this arrow you will have access to the two different reports. These reports will allow you to compare agents to each other and to the team as a whole.

### 6.1 Agent Team Summary Report – Since Midnight


Agent Team Summary Today																
Team	Agent	Media	Date	Avg Wr...	%Occu...	%Occu...	Completed Tasks									
							Handled	Held	Aband ...	RONA	Aband ...	Trans In	Trans Out	Ext Out	Internal...	
Test.Presid...	Kendall, Ju...	Cisco_Voice	10/9/20	00:00:00	1.19%	1.19%	0	0	0	0	0	0	0	0	1	0
				00:00:00	1.19%	1.19%	0	0	0	0	0	0	0	0	1	0

This real-time report shows each individual agent’s:

- %Occupancy** – The percentage of the agent’s time the agent spent working on tasks from the contact center queues.
- Calls Handled** – All inbound queue tasks that the agent answered.
- AHT** – Average Handle Time on all tasks handled from the agent’s queues.
- Average Wrap** – Average time spent on automatic wrap up time per handled task.
- AutoOutCalls** – All automated outbound dialer queue tasks the agent answered.
- Held** – Number of times a task was put on hold.

- **RONA** – Number of times a task was presented to the agent but was not answered within the no answer timeout.
- **Trans In** – The number of times tasks were transferred TO the agent from elsewhere
- **Trans Out** – The number of tasks that were transferred out FROM the agent.
- **Ext Out** – The number of outbound external calls made from the agent's line
- **InternalCalls** – The number of internal calls made from the agent's line.

## 7.0 QUEUE DATA


The **Queue Data**  tab displays the queue statistics for queues that are assigned to all the agents the supervisor supervises.

### 7.1 Supervisor Queue Statistics

Queue	CallsQNow	LongestCallInQ	CallsInPro...	Logge...	Agent State Distribution						Current Statistics	
					Ready	Hold	WorkNotReady	WorkReady	NotReady	BusyOther	HandledTo5	AHTTo5
Test.SMCCB.Task.In.Eng	0	00:00:00	0	6	1	0	0	0	5	0	0	00:00:00
	0	00:00:00	0									00:00:00

This real-time report gives the following data for each queue you supervise:

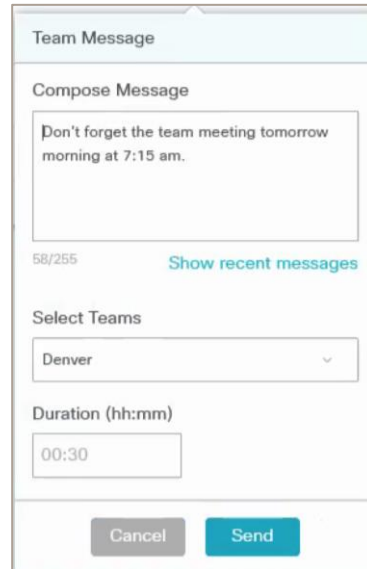
- Queue Name
- CallsQNow – Number of calls/tasks waiting in a queue.
- LongesCallInQ– Elapsed wait time of the longest call in the queue.
- CallsInProgress – Number of calls/tasks currently being worked in the queue
- Agents Logged In
- Agents Ready
- Agents Not Ready
- Agents on Hold
- Agents in After Call Work
- Current Handle Stats
  - HandledTo5 – The number of calls/tasks that have been completed over the last rolling 5 minutes
  - AHTTo5 – The average handle time of calls/tasks that have been completed over the last rolling 5 minutes

**Note:** At the top right of the report page, you will see an **Expand**  button, which allows you to expand each report to full page.



## 8.0 TEAM MESSAGE

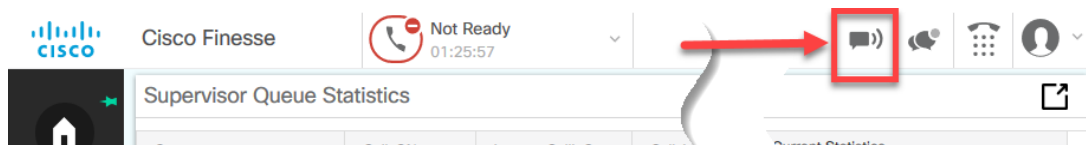
Supervisors can send a broadcast message to one or more teams. The message is displayed as a banner across the Finesse Agent desktop for everyone logged in on the selected team.



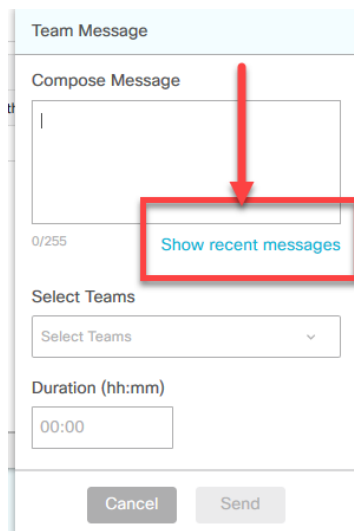
The screenshot shows a 'Team Message' dialog box. It has a title bar 'Team Message'. Below it is a 'Compose Message' section with a text area containing the message: 'Don't forget the team meeting tomorrow morning at 7:15 am.' Below the text area is a character count '58/255' and a link 'Show recent messages'. Underneath is a 'Select Teams' section with a dropdown menu showing 'Denver'. Below that is a 'Duration (hh:mm)' section with a text input field showing '00:30'. At the bottom are two buttons: 'Cancel' and 'Send'.

### 8.1 Create New Message

1. To access the Team Message feature, click on the **Team Message** icon.

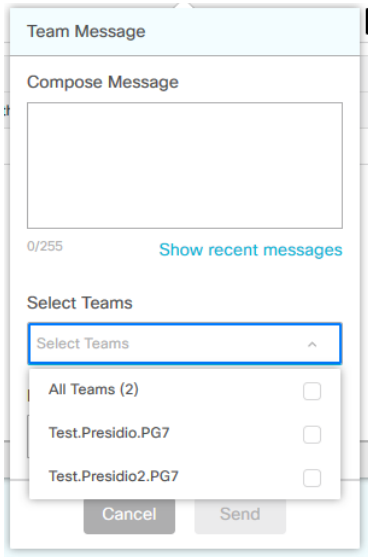


2. Compose a message. (If you wish to use a previous message, click on **Show recent messages**. You will see your previous message.)

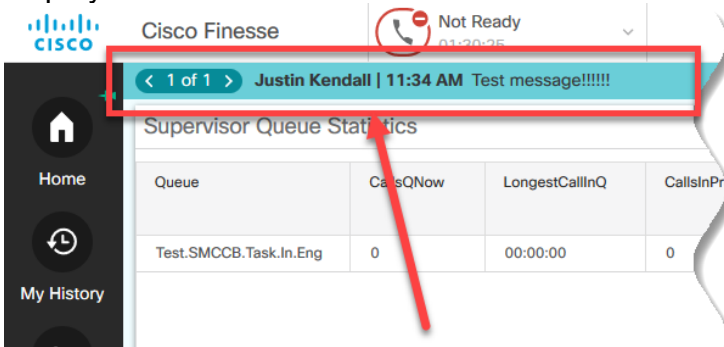


The screenshot shows the 'Team Message' dialog box. A red arrow points down to the 'Show recent messages' link, which is highlighted with a red box. The text area is empty, and the character count is '0/255'. The 'Select Teams' dropdown is set to 'Select Teams'. The 'Duration (hh:mm)' field is set to '00:00'. The 'Cancel' and 'Send' buttons are at the bottom.

3. Select the team or teams to which you would like to send your message.

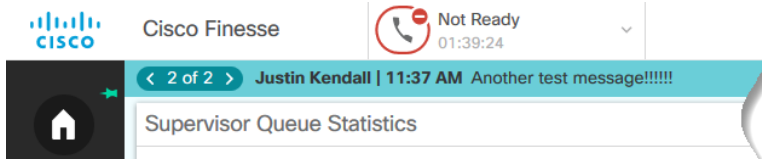
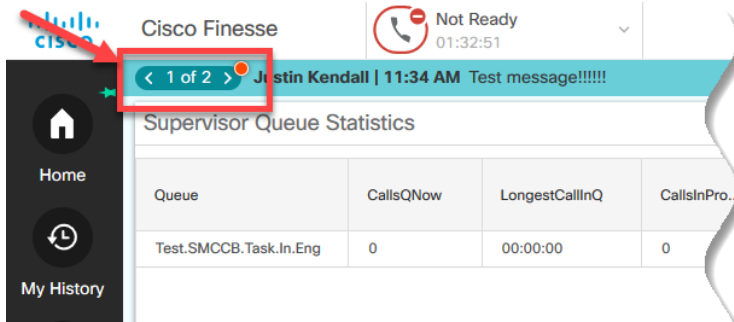


4. Choose the amount of time you wish the message to display.
5. Click **Send**.
6. The team members associated to the message will see the message displayed.



### 8.1.1 Multiple Messages

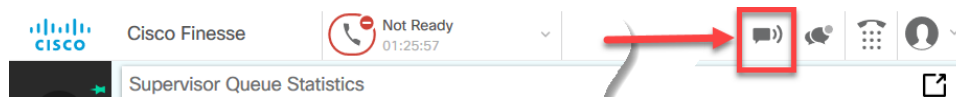
Multiple messages can be sent to the same team. When this occurs, the agent will see the number of messages increment and can navigate through them by clicking on the left or right arrows.



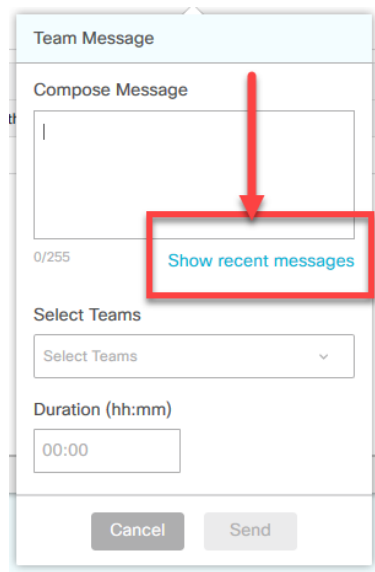
## 8.2 Delete Existing Message

To delete an existing message:

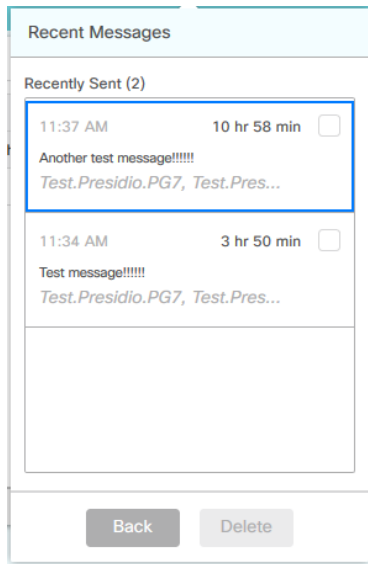
1. Open the team message window



2. Select "Show Recent Messages"



3. Select the message(s) you wish to delete by checking the checkbox and then click the **Delete** button.



## 9.0 SIGN OUT

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To sign out of the Finesse Agent Desktop:

1. You **must** put yourself in a **Not Ready** state. If you sign out from a **Ready** state, you will see the Sign out option is greyed out.
2. Put yourself in **Not Ready** and select the pull down arrow near your profile avatar.



3. Click the appropriate **Sign out** reason.

