Cisco Finesse Agent Desktop End User Guide

Revision: 2.0

For: TRAVIS COUNTY

Date: January 2020

RESTRICTIONS ON DISCLOSURE AND USE OF DATA
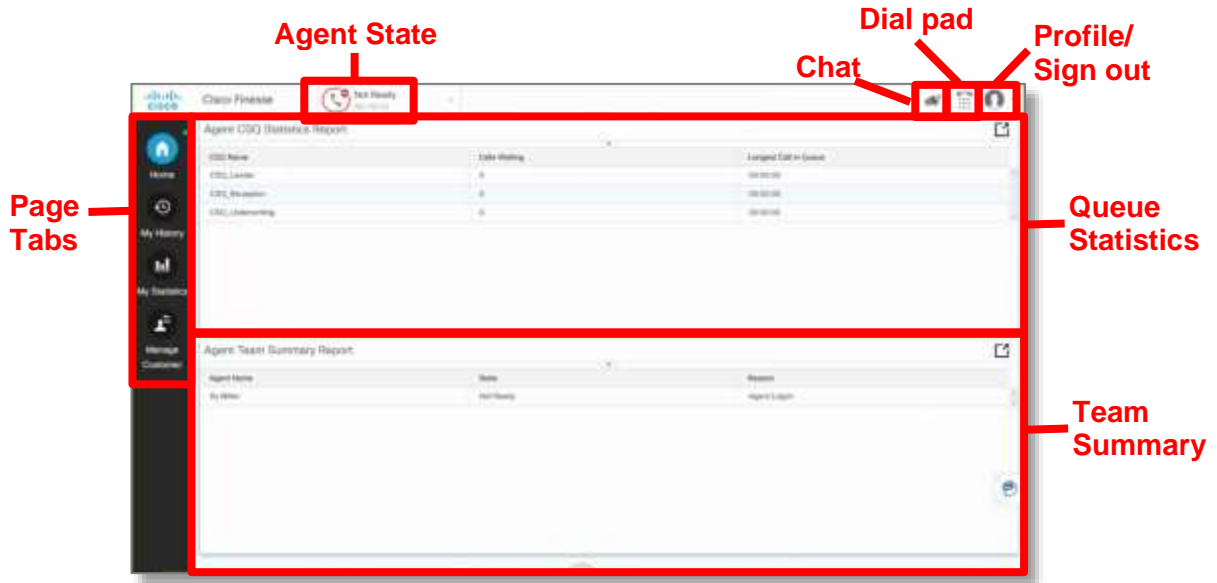
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1.0 CISCO FINESSE AGENT DESKTOP WINDOW OVERVIEW

The Cisco Finesse Agent Desktop main window displays information about active calls, Queue Statistics and Team Status. It also enables you to perform phone functions.

Page Tabs

The Page tabs allow you to change what page in the Finesse Agent Desktop you would like to view. The pages include:

- **Home** tab – displays the number of calls waiting in the queue as well as the amount of the time the first caller has been waiting in the queue. You will also be able to see your team members' current status.

- **My History** tab – displays your recent call information as well as the recent state history as well as you state history. This information is real-time, updated about every 30 seconds.

- **My Statistics** tab – displays agent statistics such as Calls Offered, Calls Handled, Talk Time and Ready/Not Ready states

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2.0 LOGGING INTO CISCO FINESSE AGENT DESKTOP

Open a web browser and type the following address:

For ITS, TCSO, DRO, CES, Pretrial, Info Booth, Law Library, HR MD, Civil Court and Criminal Court

Address: https://ent-dc-cuccxpub-p.travis.local:8445/desktop

For County Clerk, Tax Office

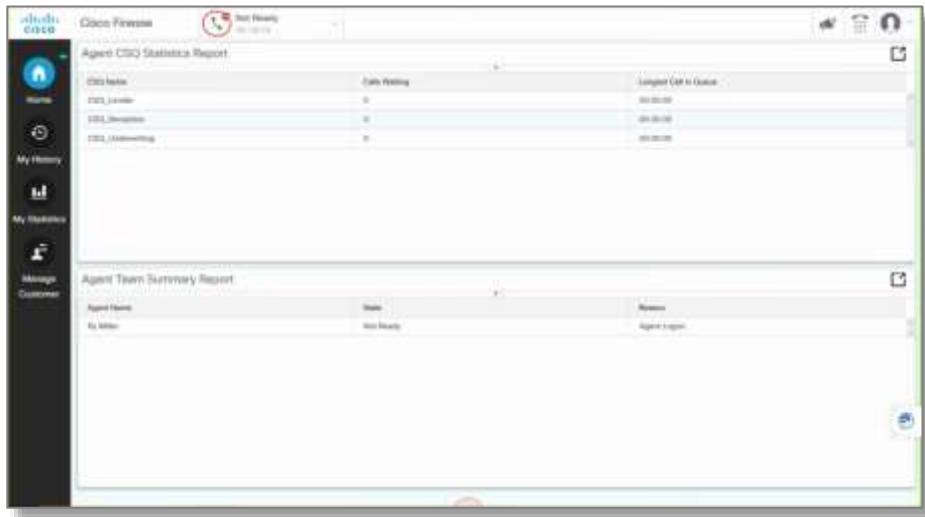**Address:** https://ent-dc-ccx2pub-p.travis.local:8445/desktop

- The **User ID** and **password** are case sensitive**.**
- Log in using your **TRAVIS COUNTY User ID** and **password**
- Use your **Agent extension number**
- Click **Sign In**

3.0 CHANGING STATE TO READY/NOT READY

The **Agent State** pull down tab enables you to make yourself **Ready/Not Ready** throughout the day.

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Note: When you first log into the Finesse Agent desktop, you will be in a **Not Ready** state.

3.1 Changing State to Ready/Not Ready

To receive inbound queue calls**,** pull down the tab and s**elect Ready** or to make yourself unavailable for queue calls, select **Not Ready**.
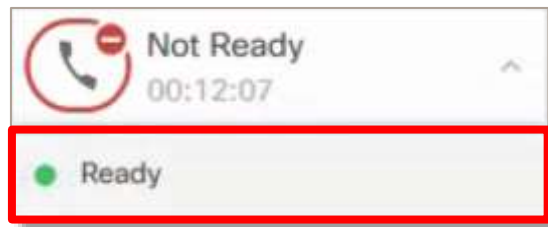

4.0 HANDLING CALLS

To handle calls, you can either use the call processing options built into Finesse Agent or your desk phone. Either option will allow you to see the call display in the Finesse Agent interface and on your phone.

4.1 Answering a Call

You can receive queue calls through Finesse Agent Desktop. You **MUST** be **Logged in**, and in **Ready state** to receive inbound queue or routed calls. You may be in either state to receive calls to your personal extension.

NOTE: QUEUE CALLS = Incoming calls that are distributed to specific resources (agents) in a Call Center.

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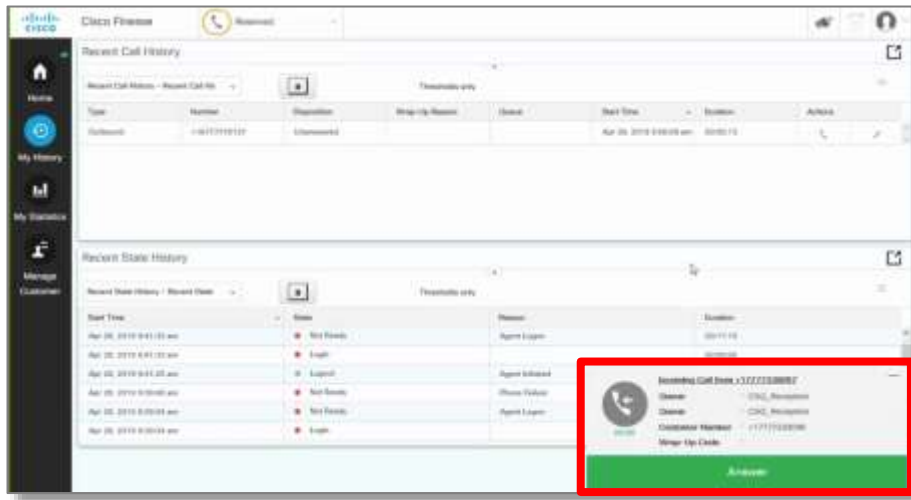
You will see an incoming call popover box at the bottom of your screen. The information will include caller ID and which queue was selected.

- To answer call, click Answer .

- To end a call, click End .

4.2 Placing a Call on Hold

- To place a call on hold, click Hold .

- To take the caller off hold, click Retrieve .

4.3 Transferring a Call – Direct Transfer

- To conduct a direct transfer (without waiting for the other person to answer first), click Direct Transfer , then dial a number to whom you wish to transfer the call.

- Click Direct Transfer again and call will be transferred immediately.

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4.4 Transferring a Call – Consultative Transfer

- To conduct a consultative transfer, click Consult , then dial a number to whom you wish to transfer the call. Wait for the other person to answer, then announce the call.

- To complete the transfer, click Transfer .

4.5 Conferencing a Call

- To add another party to an active call, click Consult , then dial the number of the person you wish to add.

- To bring all parties together, click Conference .

4.6 Making a Call Using Cisco Finesse Agent Desktop Dial Pad

To make a call, click on the dial pad [icon] at the top right of your Finesse desktop.

A dial pad will appear. You can dial using your computer's mouse to select the digits on your Finesse Agent Desktop or you can use the number keys on your computer keyboard. You can also copy and paste numbers for dialing.

5.0 QUEUE AND TEAM STATUS

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

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5.1 Agent CSQ Status Report

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

5.2 Agent Team Summary Report

The **Agent Team Summary Report,** on the **Home** page, will allow each agent to see their team members' state of **Ready, Not Ready** or **Talking**.

6.0 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.

6.1 Recent Call History – Top Report

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

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

6.2 Recent State History – Bottom Report

This real-time report shows agent's personal statistics for:

- **State** – Agent's state such as Logged-In, Logout, Ready/Not Ready, Reserved, Talking, or Work.
- **Reason** – Your contact center will not be using Reason Codes, so area will mostly be blank.
- **Duration** – Time agent spent in each state.

7.0 AGENT STATISTICS/PERFORMANCE REPORTS

7.1 Agent Statistics Report

To view your statistics, select the **My Statistics** tab. These are real time statistics.

The **Agent Statistics** report will allow you to view:

- **Calls offered** – all queue calls that were presented to your phone.
- **Calls Handled** – all queue calls that you answered. If the number of Calls Offered and Calls Handled do not match, this may indicate that you missed queue calls by not putting yourself in Not Ready.
- **Talk Time** – Average, Maximum and Total time you talk with your callers.
- **Hold Time** – Average, Maximum and Total time you placed callers on hold on your phone.
- **Ready** - Average, Maximum and Total time you were in the Ready state.
- **Not Ready** - Average, Maximum and Total time you were in the Not Ready state.
- **After Call Work** - Average, Maximum and Total time you were in the Wrap up state. Some teams will be given a Wrap up or Work time to finish up the work from their previous call before being presented another call.

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

8.0 INTERNAL CHAT

1. To sign into the Chat feature, click on the **Desktop Chat** icon.
2. Enter your **TRAVIS COUNTY username** and **password** and click **Sign In**.
3. Select the person with whom you wish to chat and a chat window will pop up.
4. Type your message is the message area.
5. Chat features include:
   - Right clicking gives you basic clipboard operations,
   - An indicator makes you aware when the other participant is typing a message.
   - A display of up to three active chat sessions.
   - Display of your Desktop Chat state. By default, your state will indicate **Available**. Click on the drop-down arrow to update your state.

9.0 SIGN OUT

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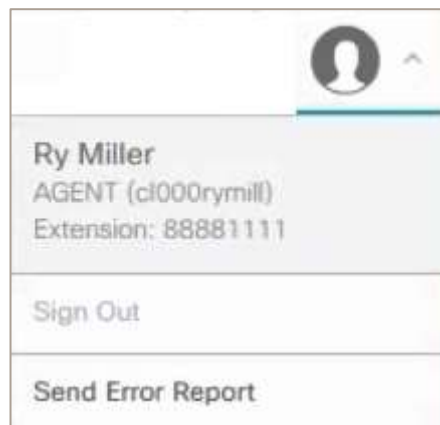
To sign out of the Finesse Agent Desktop:
1. You **must** put yourself in a **Not Ready** state. If you sign out from a **Ready** state, you will see the Sign out option is greyed out.

2. Put yourself in **Not Ready** and pull down arrow near your profile avatar .
3. Click **Sign Out**.