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## Cisco Unified Contact Center Express (UCCX) Finesse user Guide

### Contents

Purpose.....	2
Logging for the first time. ....	3
Accepting Certificates. ....	4
Going ready and taking the first phone call.....	10
Going Ready.....	10
Logging Out.....	11
Taking a phone call .....	12
Transferring a call .....	13
Wrapping up a call.....	16



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## Purpose

The goal of this document is to provide a general overview of the use of Cisco Finesse. Your company's implementation may differ and not all features or services talked about in this document will be enabled.

Please contact your Helpdesk should you have any questions or concerns about the feature set of your system

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## Logging for the first time.

Depending on your company's version of Cisco Unified Contact Center Express (UCCX), you will want to ensure your using the correct browser for UCCX finesse.

Non Supported browsers, regardless of versions

- Internet explorer running in capability mode

Supported browsers based on versions

### **UCCX 10.6x**

- Internet Explorer 10 or 11
  - May require weak SSL modification
- Firefox Extended Service release 31 or higher

### **UCCX 11.0**

- Internet Explorer 10 or 11
  - May require weak SSL modification
- Firefox extended service release 38 or higher

### **UCCX 11.5**

- Internet Explorer 10 or 11
- Firefox extended service release 45 or higher
- Chrome 48 or higher.

### **UCCX 11.6**

- Internet Explorer 11
- Firefox extended service release 45 or higher
- Chrome 48 or higher



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Please ask your IT team for the full URL of cisco finesse login. Once you have that URL please open your internet browser and navigate to the provided url. **NOTE:** in most cases, you can click the URL that your IT team provided you. Please ensure the URL opened in the correct browser listed above.

<https://uccx01.company.com:8445> This is an example URL. Provided by your IT team. Clicking the link may open a browser warning the site is not secure. This is talked about in the below section.

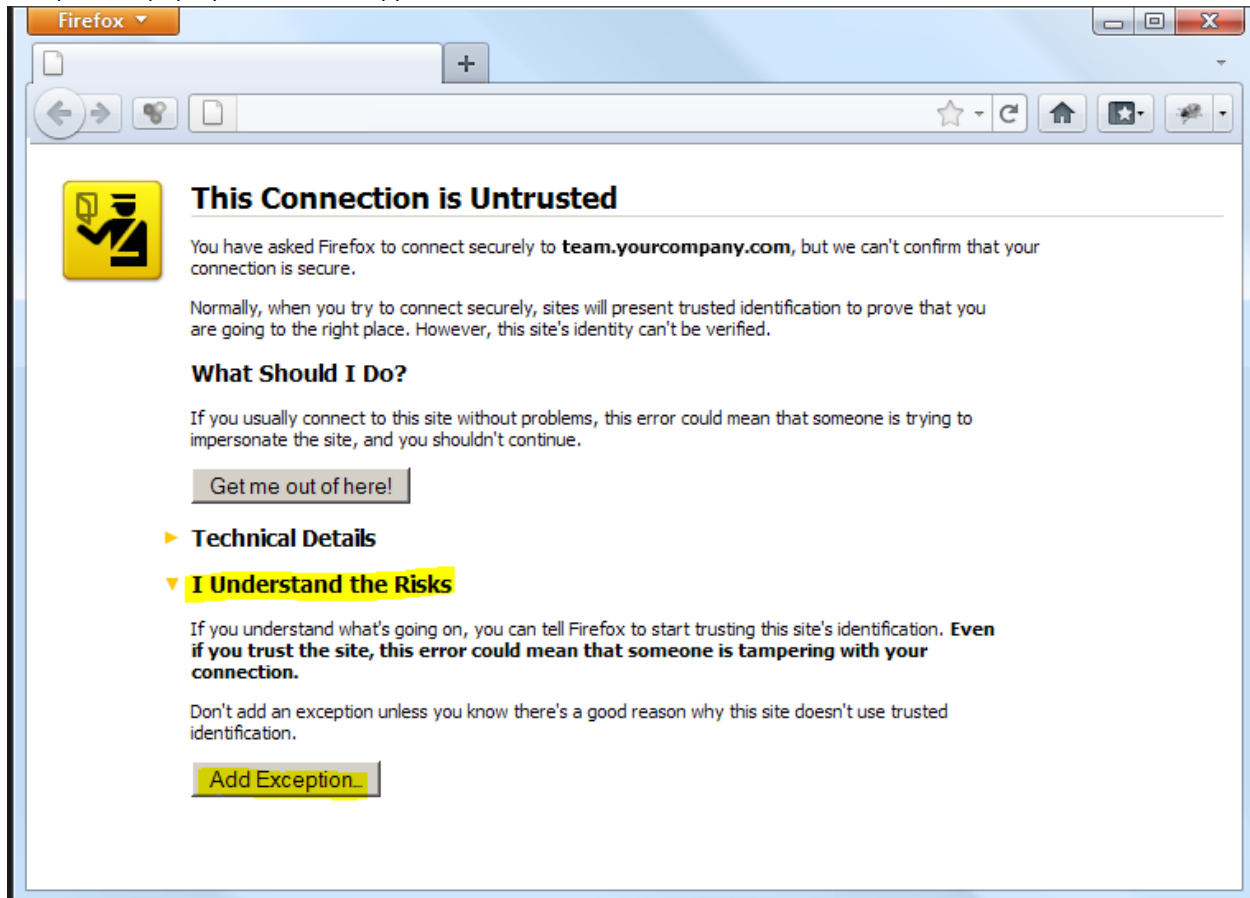
It's recommended you bookmark this site (once you're at the login screen)

Accepting Certificates.

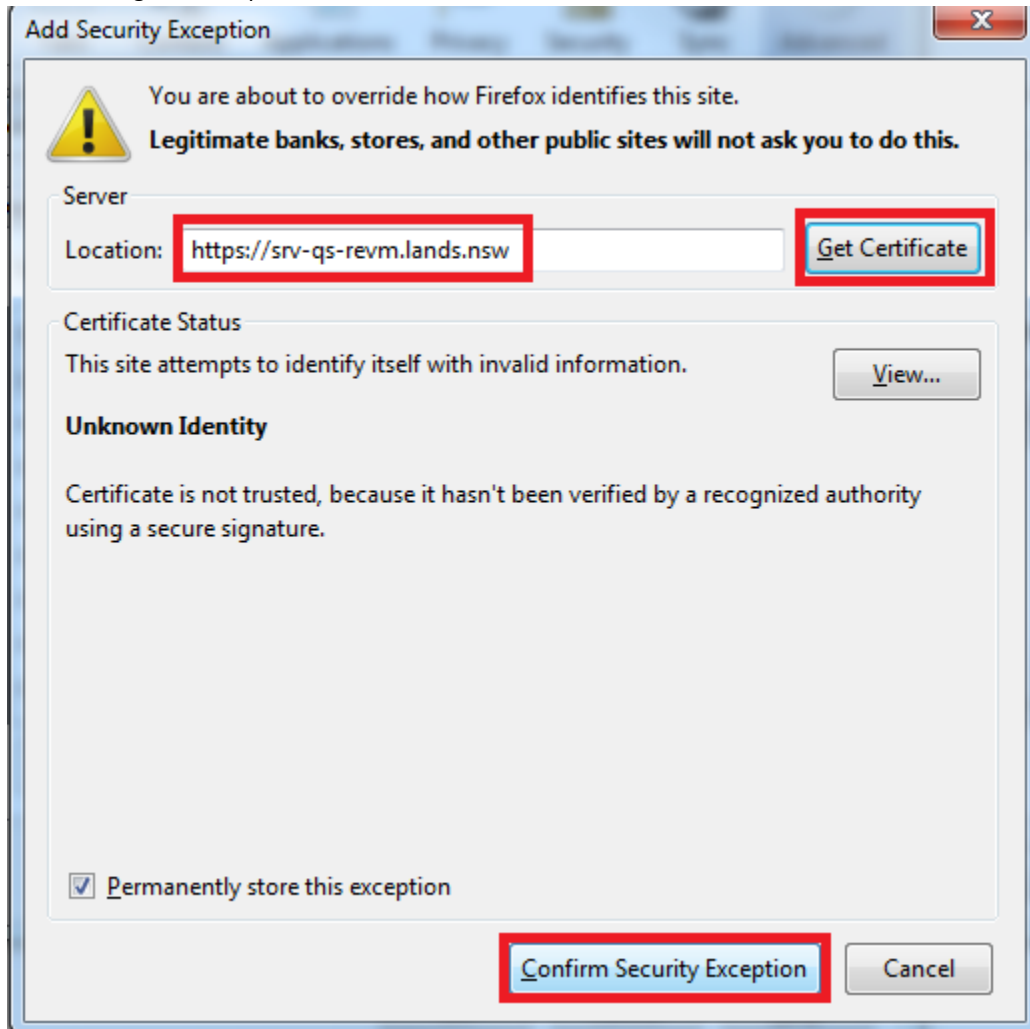
If using internet explorer, you may get a screen that looks like the one below. If so, Click Continue to website.

A screenshot of an Internet Explorer security warning dialog box. The title bar is light blue. The main content area has a white background with a light blue border. At the top left is a red shield icon with a white 'X'. To its right is the text "There is a problem with this website's security certificate." in blue. Below this is a horizontal line. The text "The security certificate presented by this website was not issued by a trusted certificate authority." is in black. Below that is "Security certificate problems may indicate an attempt to fool you or intercept any data you send to the server." in black. A bold black line of text reads "We recommend that you close this webpage and do not continue to this website." Below this are two options: "Click here to close this webpage." with a green checkmark icon, and "Continue to this website (not recommended)." with a red 'X' icon. The second option is highlighted in yellow. Below these is a link "More information" with a blue globe icon. At the bottom, there are two bullet points: "If you arrived at this page by clicking a link, check the website address in the address bar to be sure that it is the address you were expecting." and "When going to a website with an address such as https://example.com, try adding the 'www' to the address, https://www.example.com." At the very bottom, it says "For more information, see 'Certificate Errors' in Internet Explorer Help."

If using Firefox, you may get a screen that looks like the one below. Click I understand the risks, then add exception. A pop-up window will appear



Click Get Certificate and then Confirm Security Exception. **Note.** This process will need to be repeated several times throughout this process.



You should at a screen that looks like the one below



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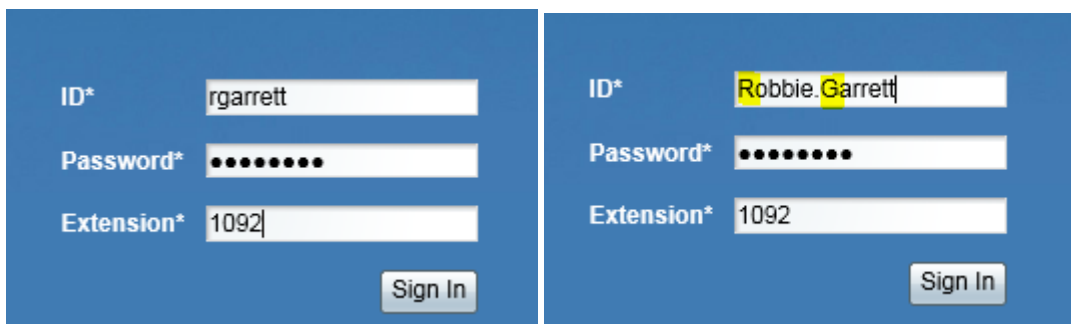
**\*\* Bookmark this page**

Enter your login information. Ask your IT Team for your login information if you do not know it.

ID = This is **typically** your windows login. Some companies require certain lettings within your username to be capitalized (see below for some examples.)

Password = This is **typically** your computer password.

Extension = This is the extension of your phone



When all fields are populated, click Sign In. If the login information was entered correctly, you will start the login process.

You may be presented with a black box asking you to accepts certificates as shown below. Click ok to accept the additional certificates. **NOTE.** This process will open additional tabs within your browser. Please repeat the ACCEPTING CERTIFACITES section of this document which will help you with this process.



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Once fully logged in, you will be presented with a screen that looks similar to below





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**CISCO** Agent Robbie Garrett (rgarrett) - Extension 1092 Sign Out ▾  
Not Ready ▾ 01:12

[Home](#) [My Statistics](#) [Manage Call](#) [Manage Chat and Email](#)

**Make a New Call**

**Agent CSQ Statistics Report**

CSQ Name	Calls Waiting	Longest Call in Queue
Customer Service	0	00:00:00
Support	0	00:00:00

**Agent Team Summary Report**

Agent Name	State	Reason Code
Robbie Garrett	Not Ready	32760

© 2010-2016 Cisco Systems, Inc. All rights reserved. Cisco Finesse v10.6(1) Send Error Report ?

End of section.



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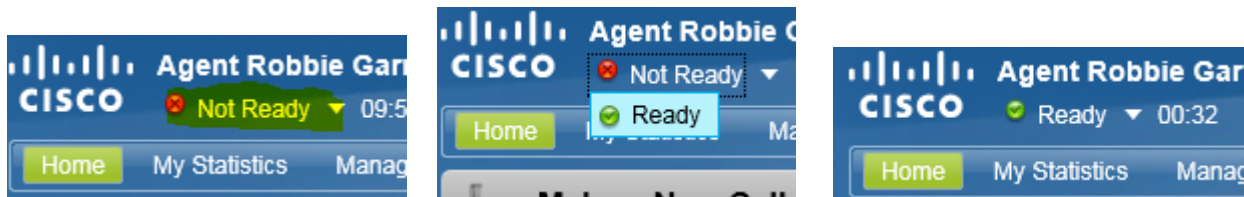
## Going ready and taking the first phone call.

It's important for the agent to understand the following

- 1) You must be in a ready status before you will get Call Center calls (see going ready section of this document for that process)
- 2) If you pick up your phone to make a phone call or a co-worker calls your extension, you will be placed in NOT ready status. This means if a call comes into the QUEUE and you're the only agent logged in, the call will remain on hold until you end your current call.
- 3) You can only be on one call at a time. The Call center system will only deliver a single call center call to you at a time. If your phone rings while on a call center call, it's most likely a co-worker calling your extension. It's **recommended** that agents make use of the company messaging system to communicate between team members. This will assist with ensuring MAXIMUM ready time for calls.
- 4) Please sure you go into not ready when leaving your desk. When you return, please ensure you're in a ready status. If you left yourself in a ready status while away from your desk, it's possible you got a call from the queue. If you did not answer that call, the system will place you in a NOT ready status. You will not get any calls until you go ready again.
- 5) Closing your browser window **WILL** log you out of the system. You will need to complete BOTH Logging for the first time and Going Ready sections of this document to login again.

## Going Ready

Once logged in, you will want to click the Not ready in the upper left corner and choose ready.



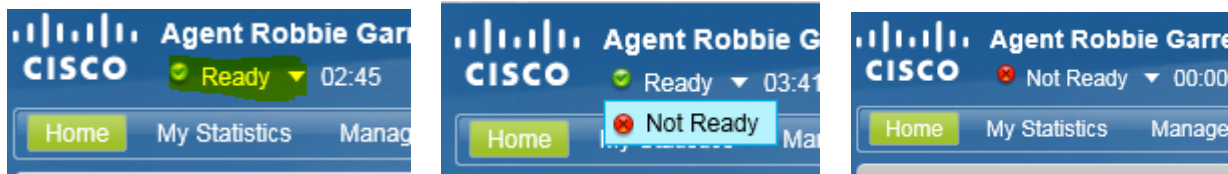
Notice that once you go ready, a counter will start to count. This data is live.



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## Going Not Ready

While in a ready or work status, you will want to click ready in the upper left corner and click Not Ready.



## Logging Out

To end your shift or logout of the call center, you will want to click Sign Out in the upper right corner **while** in a **Not Ready** status. **Note:** this option is NOT available while in a ready, talking, or work status.



End of section.



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## Taking a phone call

Once you're in a ready status, the system will consider you ready for a call center call. If your chosen for a call center call, you will notice a call coming in to your phone (typically with a caller ID of Call center or UCCX) and your agent screen will look like the one below.



**Reserved** status means you have been chosen for a call from the call center. You will typically have 12-16 seconds to answer the phone before you will be put into a not ready status. If you fail to answer the call before 12-16 seconds, you will be put into a ready status and marked as Not Ready – Missed a call center call.

You can answer your phone several ways.

-  By clicking the Green Answer key on the screen.
- Answering your phone via the handset
- Answering your phone via the headset
  - Some companies have chosen to deploy Hook Switch enabled headsets which will control of phone answer / hangup via button on headset. This feature is FULLY supported with call center.

Once you answer your call, your status will transition to **talking** status.





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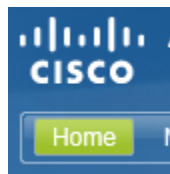
## Transferring a call

Please note, you can either use the phone to transfer the call or use the software to transfer the call. This section will cover the Finesse way of transferring a call.

While on a call center call, your screen should look similar to the one below.



If your screen does not look like this, please ensure you're on the Home Tab.



To start the transfer process, click the Consult button





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Your screen will change to look like below

The screenshot shows a Cisco call management interface. At the top, there are navigation tabs: Home, My Statistics, Manage Call, and Manage Chat and Email. Below this is a call status bar showing '00:06 | Call Variable 1' and the number '7174313146'. There are buttons for Keypad, Hold, Consult, and End. Below the call status bar, there are two columns of call variables (1-10) and a 'Wrap-Up Reason' dropdown with an 'Apply' button. Below that is a 'List of Contacts' section with a search bar and a table. The table has columns for Phone Book, Last Name, First Name, Number, and Notes. The first row shows 'Overall', 'Desk', 'Help', '1289', and an empty Notes field. To the right of the table is a numeric keypad with buttons for digits 1-9, \*, 0, #, Call, and Cancel.

Phone Book	Last Name	First Name	Number	Notes
Overall	Desk	Help	1289	

Using your computer keyboard, enter the number you want to Transfer too **OR** click an entry from your phone book



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1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0 +	#
<b>Call</b>	<b>Cancel</b>	

### List of Contacts

Phone Book	Last Name	First Name	Number	Notes
Overall	Desk	Help	1289	


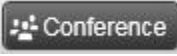

When ready to start the transfer, click the green call button.



This will put the customer on hold and start calling the number you chose. Not your screen changes to the screen below



You are now connected to the other party you are trying to transfer too. The customer is still on hold. You can now choose

-  will transfer the customer directly to the new extension, removing you from the conversation all together.
-  will join you, the customer, and the person you're trying to transfer the call too one a conference call.
-  will allow you to speak with the customer again (perhaps to answer a question the other department is asking you to ask the customer before you transfer).

## Wrapping up a call.

Some companies chose to enable After call work or wrap up time. Once your call ends will you be automatically put into the following status

- Ready
- Wrap-Up

**Note:** In some cases, you will have only a few moments before going from Wrap-Up to ready again.

If your company has configured Wrap-up codes, you will need to choose the wrap-up reason before moving into a ready status.

Make your selection from the Wrap-Up Reason drop down box and click Apply

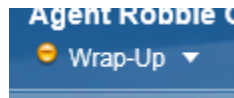




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After making your selection, choose ready from the upper left corner (currently showing Wrap-Up)



Ensure you either go ready or the system puts you in automatic ready for your next call.

End of section