CISCO FINESSE SUPERVISOR USER GUIDE

STUDENT SERVICES CONTACT CENTRES

June 2021

TABLE OF CONTENTS

Select any of the menu items below to navigate to that section of the user guide. Select the Home button to the bottom right of the page to come back to the Table of Contents at any time.

Benefits of the New System

For employees

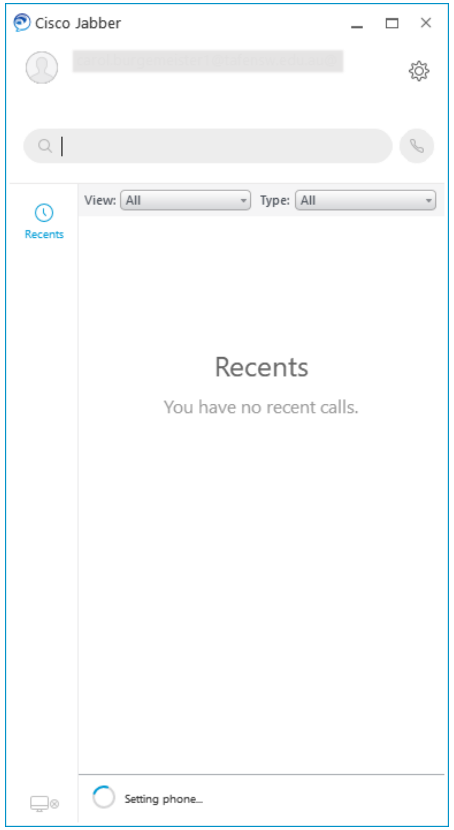
- Improved user interface and better system integration making them easier to use
- Users will be able to dial in from anywhere enabling flexible work practices
- Repetitive tasks like greetings or reading out learner declarations can be automated

For customers

- Improved student experience when calling contact centres
- The new Integrated Voice Recognition (IVR) will help queries be answered quicker and directed to the right people the first time
- Fewer dropouts when waiting for service

CISCO JABBER QUICK REFERENCE GUIDE

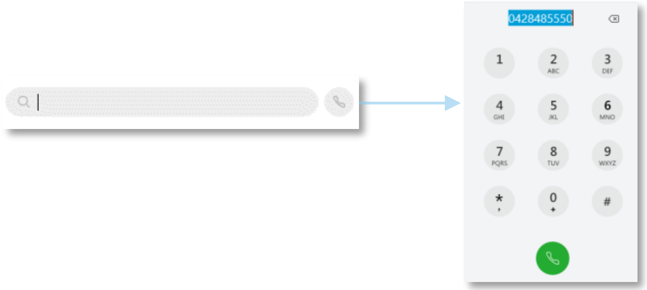
JABBER SCREEN



CALL HANDLING

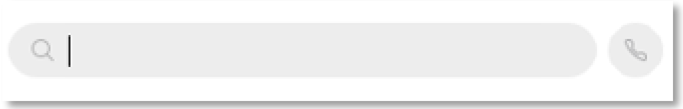
The Call bar section can be used to manually enter a phone number. On the right to the bar is a dial pad as an alternative.

A call will be placed once you either press enter on your keyboard or you select the green 'phone' button.



The Search field/Call bar allows you to find a contact in the phonebook. As soon as you begin typing the Directory will begin to perform a 'best match' search.

Once you have found the contact select the green phone button to call them.



nb. the address book will only include frequently called numbers and will be the same for all contact centre operators

Frequently Asked Questions

Q *How do I **install** Cisco Jabber?*

A You can install Cisco Jabber via the Software Centre.

1. Select the Windows menu and type in Software Centre (Software Centre is often available on the desktop also).
2. Select to open
3. Type in Cisco Jabber in the Search bar
4. Select Install
5. Shortcut is added to Desktop

Click here for the Software Centre Guide

Q *How do I **open** Cisco Jabber?*

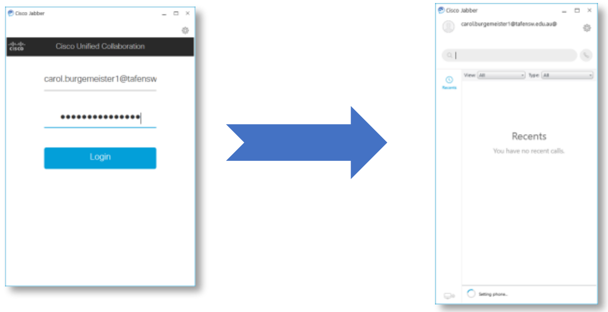
A Select Cisco Jabber (icon shown below) from either the desktop or Windows menu.

LOGGING IN

Before logging into Cisco Finesse, a user MUST first ensure that they are logged into Cisco Jabber. Cisco Jabber is the IP Phone which is the link between Cisco Finesse and the incoming party, the customer. This step is very important and is generally the main 'Go Live' issue for Contact Centres.

To access Cisco Jabber, ensure that you have this installed and then click on the Jabber icon on the desktop.

The user will need to login with their local windows id (email address) and password.



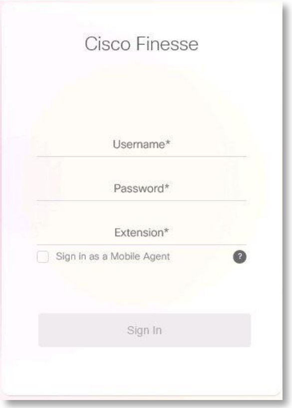
To log into Cisco Finesse, the user will need to open Internet Explorer and paste the following URL.

https://zsfin01.ad.tafensw.edu.au/desktop/container/?locale=en_US

The log in window will be displayed. Enter the following details:

- Username (Email address)
- Password (the default is = password).
- Contact Centre extension number (obtained from Jabber)
- Ignore the Sign in as a Mobile Agent tick box. This is not required.

Click **Sign in**.



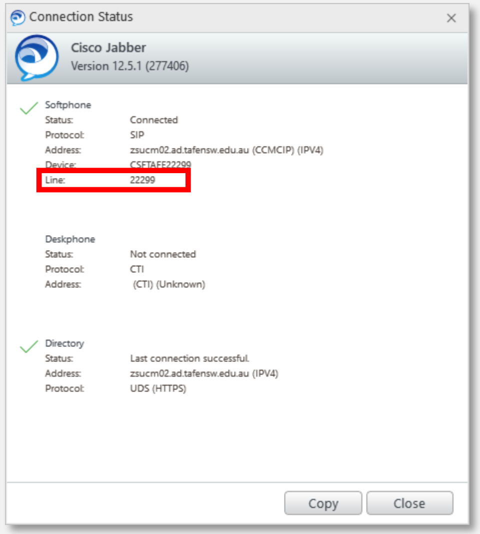
Frequently Asked Questions

Q *Why is Finesse not working?*

A Ensure you are logged in to Cisco Jabber. If you have checked this and it is still not working contact your Team Leader or Manager.

Q *Where is my extension number?*

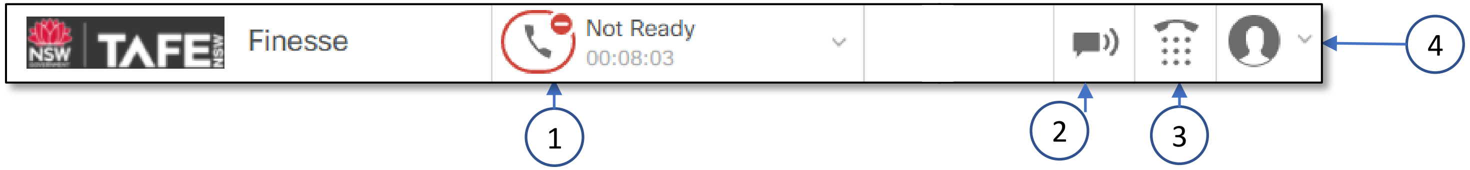
A You will be able to find this in Jabber. Select the cog in the top right hand corner, then Help > Show Connection status, then go to Line.



BASIC NAVIGATION

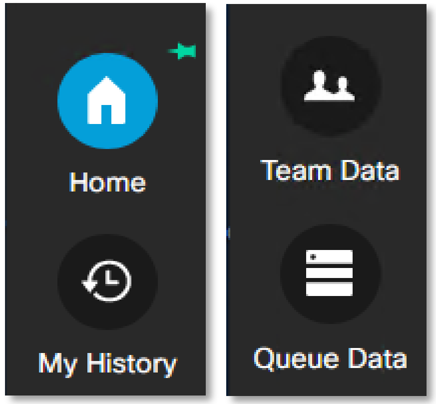
Once logged in, the top bar features the following from left to right.

1. **Agent State** – this changes the user's availability to answer incoming work. After a call has ended, this will change to Wrapup.
2. **Broadcast Message** – to broadcast a message to the users/Supervisor's team
3. **Make A New Call** (Dialpad) – to make outbound calls externally or internally through the phonebook
4. **Identity Gadget** – houses the user's name, team member ID and extension and allows the user to sign out of Finesse



The left side of Finesse also houses a list of additional tools/widgets.

Home – set as default for all Supervisors, contains all users within the Supervisor's Team and their current state and time with the option to modify Agent Status', Sign Out and Barge calls.
My History – this provides the user a view on the calls and state history during a logged in session.
Team Data – Agent statistics
Queue Data - displays the current state of the queues assigned to the Team the user is assigned to.



Frequently Asked Questions

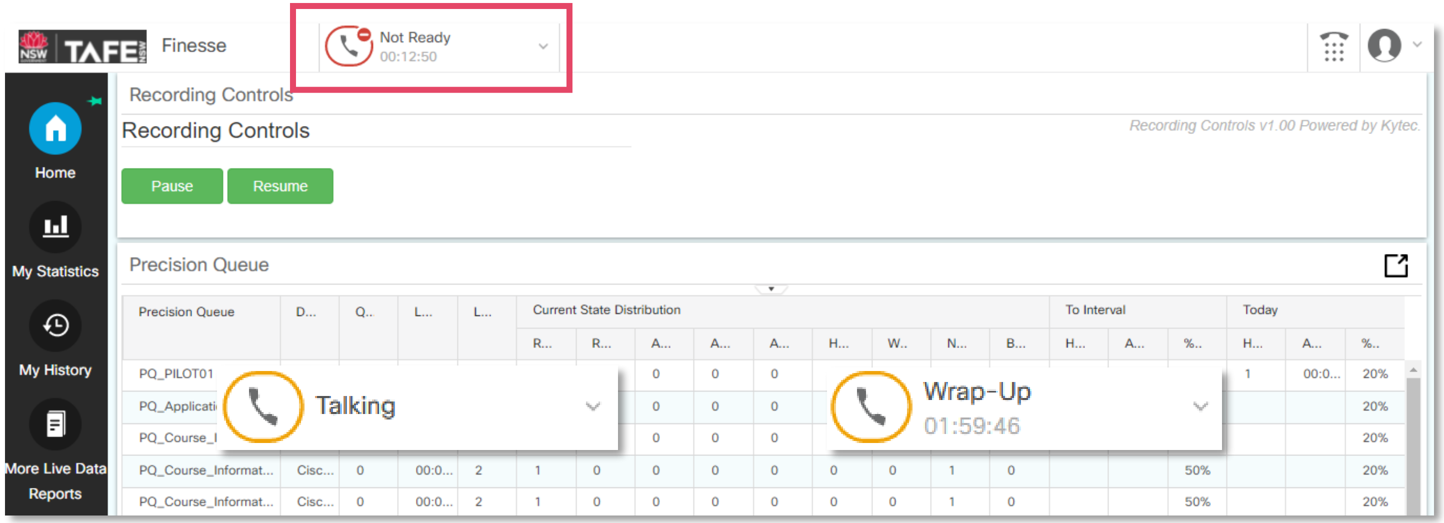
For additional information on Supervisor related functions within Finesse, navigate to the below URL and download.

Cisco Desktop User Guide

STATUS & NOT READY REASON CODES

Before you can receive queued calls, you must change the Status to 'Ready'. The default Status when a user first logs in is 'Not Ready'. This is to ensure that users don't receive incoming calls as soon as they log in.

To become 'Ready' or available to take incoming calls, click the drop down arrow next to the Not Ready status and select Ready. The user will now be available to receive incoming calls from the queue.



During a call, a user's status will change to Talking while post a completed call, the user's status will change to Wrap-Up. Not Ready codes and Wrap-Ups will be covered in their own sections within this guide.

Frequently Asked Questions

Q *How do I change my Not Ready reason code?*

A To change your status to a Not Ready reason code, select the drop down arrow next to the current status and choose the appropriate code based on the activity. If you need to change the status to 'break' due to this schedule activity occurring straight after the current call, you can do this during the time the call is in Wrap-Up.

Q *What are the not ready reason codes that TAFE NSW are using and does it matter if I use the incorrect code?*

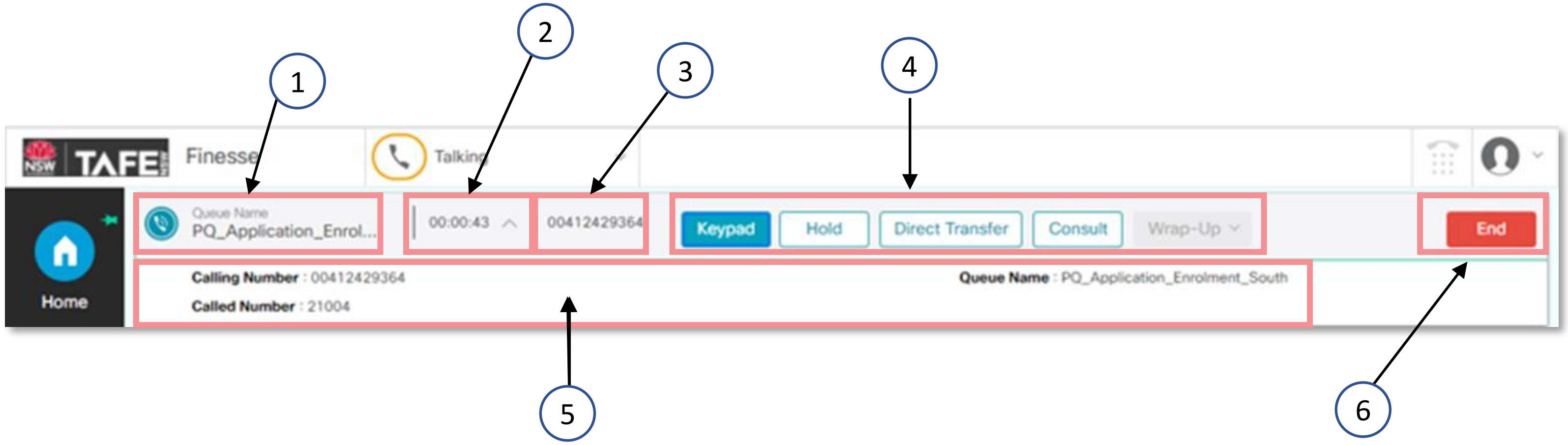
A We would like everyone to be using correct codes wherever possible. Please see below for descriptions or seek advice from your Team Leader.

1. Break – paid break
2. Home – select before signing out
3. Lunch – unpaid break
4. Meeting – all meetings
5. Offline
6. Outbound
7. Personal – bathroom or personal time
8. Team Leader
9. Training

ANSWERING A CALL (INBOUND)

As a call is presented to a user, it will ring 3 times and you need to select the green Answer button.

The Finesse interface will change and provide the following details of the incoming call as well as call controls.



1. **Queue Name of where the call arrived from**
2. **Duration of the call**
3. **Incoming call number**
4. **Call Controls**
5. **Screen Pop**
6. **End Call**

At this point, the user will be able to hear the customer and assist with their enquiry.

Frequently Asked Questions

Q *Will I receive out of region calls?*

A Occasionally.

Q *What happens if I receive a call from another region/area?*

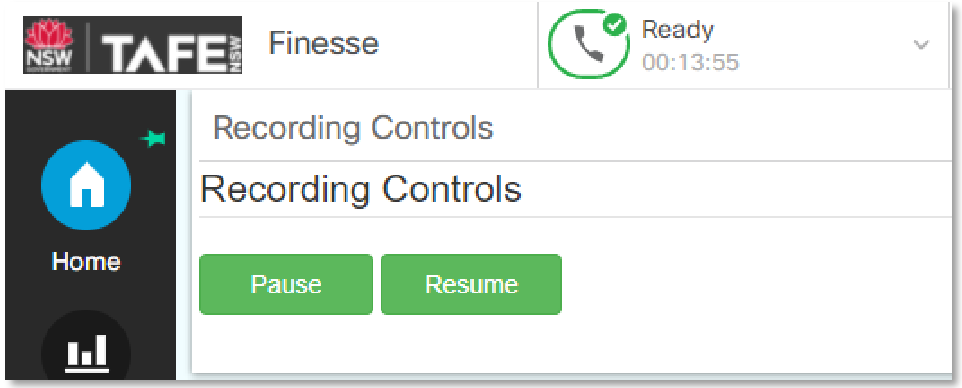
A If you can handle the enquiry you should. If not you can transfer to the enquiry to the appropriate call centre using the Direct Transfer option.

Q *What happens if I don't answer within 3 rings?*

A Your Not Ready Status will automatically change to Not Answered. You will manually need to rest the Status.

PAUSE/RESUME CALLS

Even though Calabrio is configured to automatically pause and resume calls that touch on payment related screen activity, for the unlikely case of where a customer requests their calls to not be recorded, the user will be able to comply by navigating to the Recording Controls widget.



When selected, two green buttons to 'Pause' and 'Resume' will appear under the screen pop within Finesse. When recording the Pause button will be a lighter green and the Resume the darker green.

Frequently Asked Questions

Q *What is Secure Pause?*

A Secure Pause is a process used by Contact Centres when recording calls, to pause recording when taking card payment details.
This process and its subsequent procedures provide TAFE NSW Contact Centres with clear and consistent practices on how to manage call recordings when taking card payment. Also is used if a customer requests not to have the call recorded.

Q *Why is Secure Pause required?*

A Secure Pause is required to maintain compliance with Payment Card Industry Data Security Standard (PCI DSS). By pausing the recording

- during card payment, we are reducing the risk of storing CHD to prevent misuse by hackers and fraudulent activities
- we ensure, that we have completed our tasks correctly and provided our customers with the required level of service and met our objectives as NSW TAFE staff.

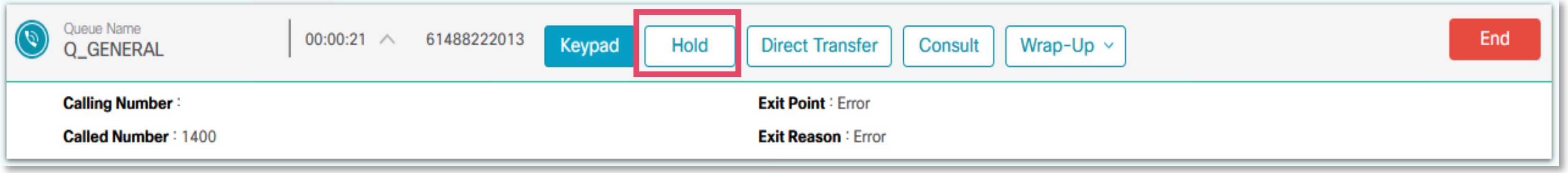
Q *What if I forget to use the Pause?*

A You need to advise your Manager/Team Leader with the call details and they will raise a Service NOW ticket to delete the recordings. Refer to process for Secure Pause Procedure and Delete Call Recording Procedure.

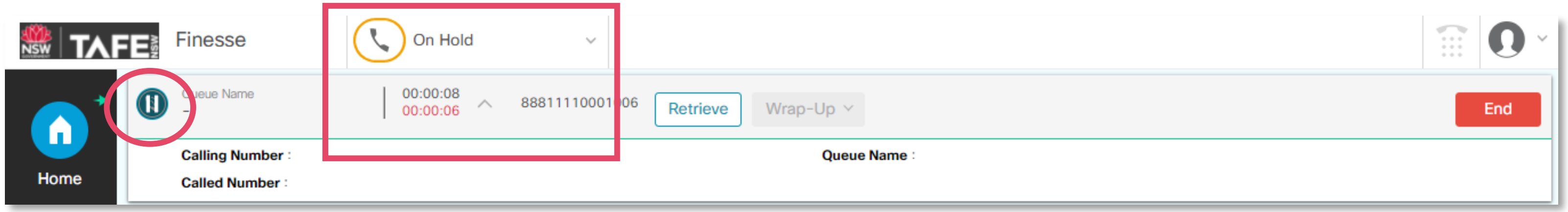
CALL CONTROLS: HOLD

During an active call, the user will have Call Control icons such as Keypad, Hold, Direct Transfer, Consult and End to assist with managing the call.

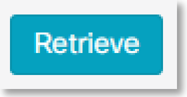
To place a call on hold, click on the Hold icon.



A pause icon will appear next to the call and the customer will hear hold music. During this time, the Status will change to 'On Hold' and a count up timer (in red) will appear.



To retrieve the call from hold, click on the Retrieve icon.



CALL CONTROLS: DIRECT TRANSFER

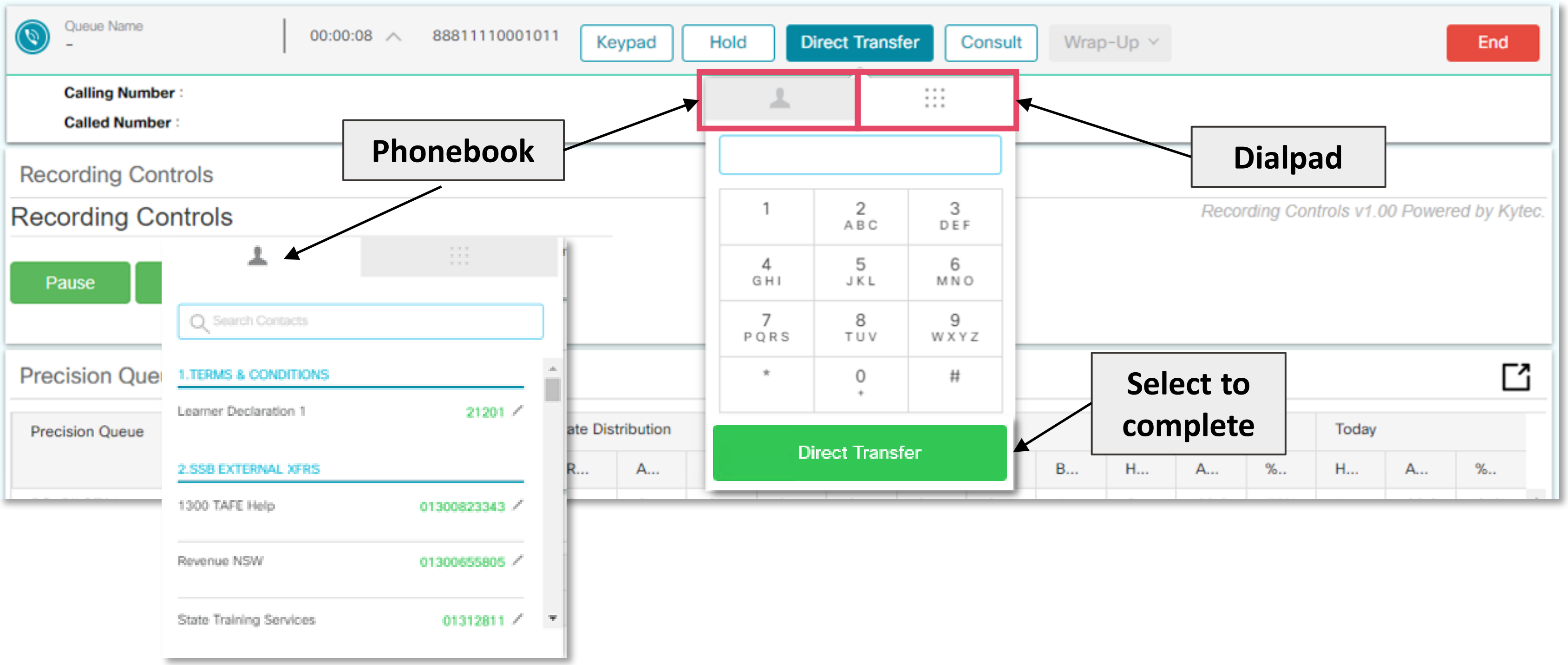
A Direct Transfer is otherwise known as a Cold Transfer and is to be used for handing off calls to another party without any engagement.

To initiate a Direct Transfer, on an active call, the user selects the Direct Transfer button from the call controls which opens an additional module.

This module will present the user with options to either manually dial a destination (Dialpad) or select a contact within the Contact Centre Phonebook.

Once the user has decided on where the call is to be transferred to, the button will turn green. The call will be routed to complete the Direct Transfer. During this time prior to the transfer being completed, the call or customer is placed on Hold.

The user will automatically move to the Wrap-Up status post this action.



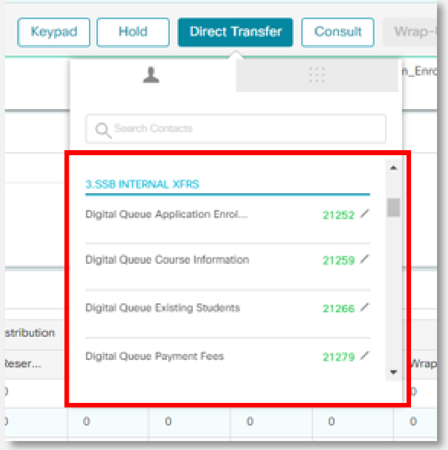
Frequently Asked Questions

Q *Do I need to dial '0' before doing an external transfer?*

A Yes. An external transfer is anything outside of a contact centre. For example if you were transferring the call to a campus or Head Teacher.

Q *How do I transfer a call to another regions queue?*

A Go the Phonebook and select the region based PQ. In the phonebook hover over the queue name to see the full name.

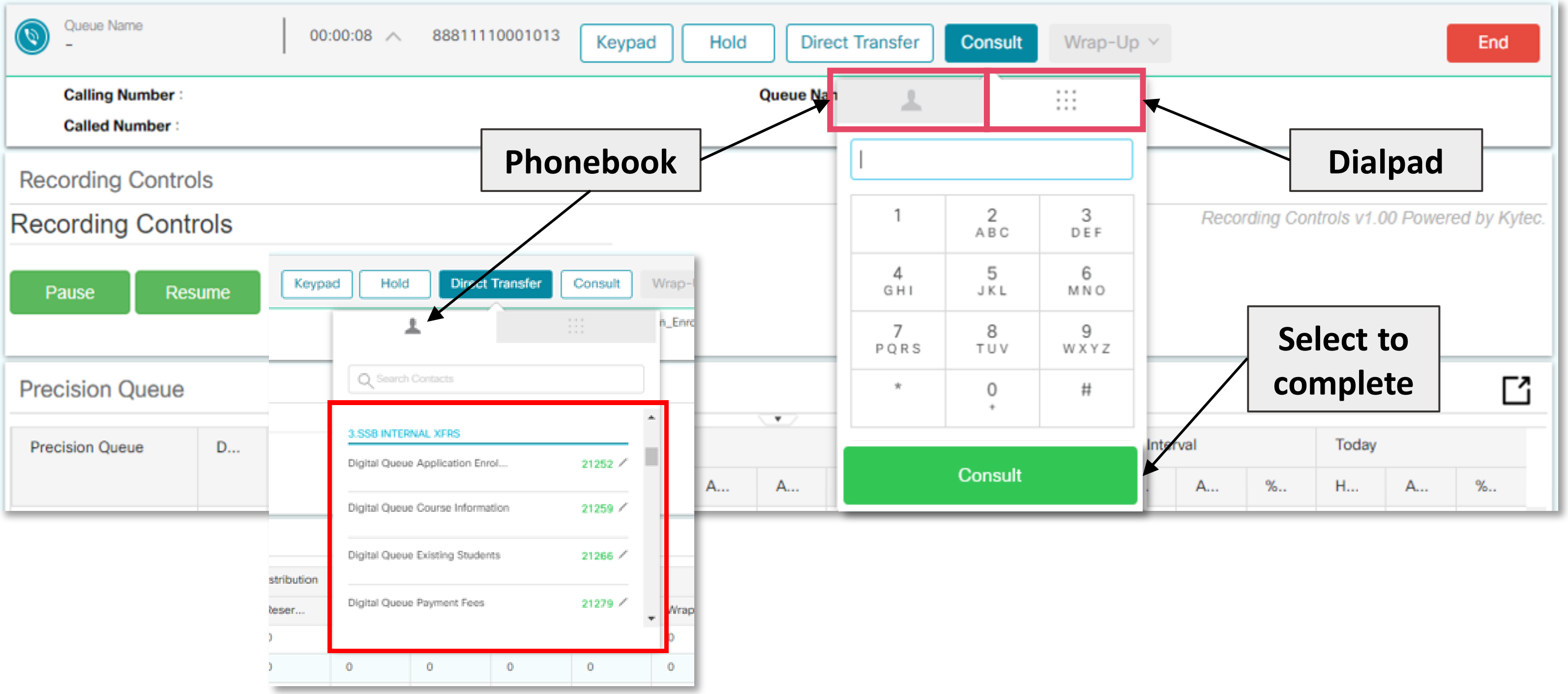


CALL CONTROLS: CONSULT TRANSFER (1 OF 3)

A Consult Transfer is otherwise known as a Warm Transfer where the user will have the choice to engage with a third party on one call to either alternate between this party and the customer or merge them all in one conversation (Conference).

To perform a Consult Transfer, on an active call, the user selects the Consult button from the call controls which opens an additional module.

This module will present the user with options to either manually dial a destination (Dialpad) or select a contact within the Contact Centre Phonebook, similar to the Direct Transfer process.



Frequently Asked Questions

Q *What numbers will be in the Phonebook?*

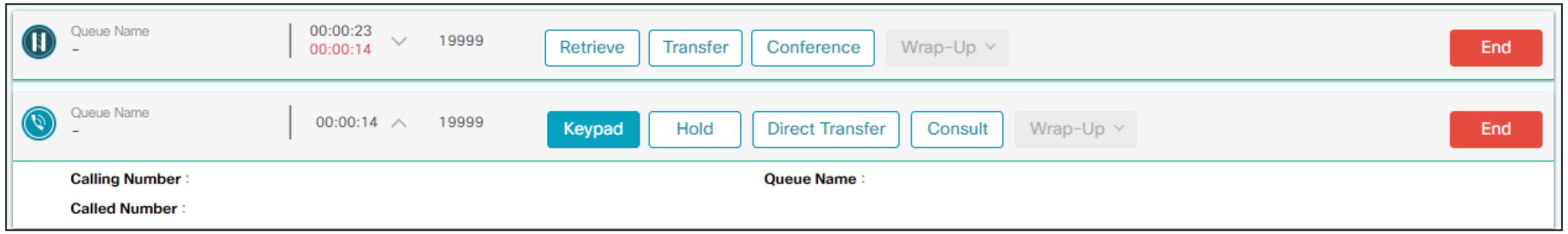
A These will be populated by frequently called numbers.

Looking for more Consult Transfer options select any of the links below to see more detail

- Alternate Between the Two Parties
- Conference all parties to be on the one call
- Warm transfer a customer to a second party

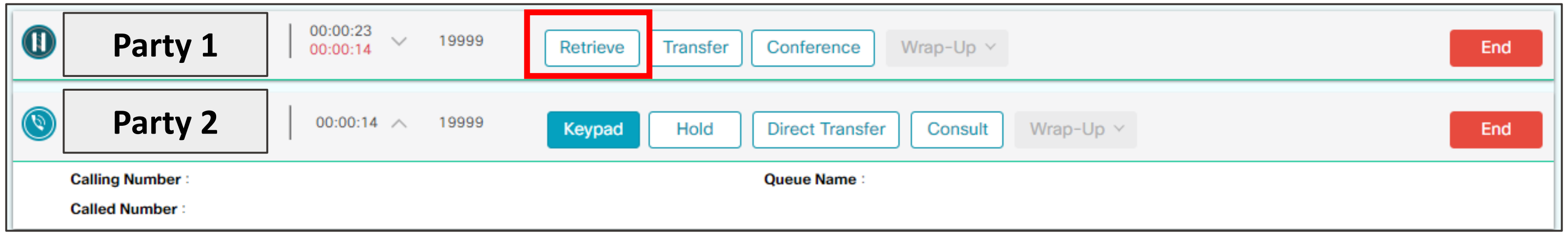
CALL CONTROLS: CONSULT TRANSFER (2 OF 3)

As the next party or destination has answered, the user will now see two active calls. One being the initial call or customer (which is now on Hold) and the second being the next party which has additional call controls.
The screen pop from the initial call will be still visible for the user to pass on any customer information to the next party.
At this point, the user can choose to do the following.



Alternate between the two parties

The user can use the call controls to place either party on Hold. Depending on which party will be on Hold, remember to navigate the call controls against that party. To bring back a party from being on Hold, click the Retrieve button. If party one or the customer is retrieved, the alternate party will be automatically placed on hold.



Frequently Asked Questions

Q *Are all employees in TAFE NSW in the Phonebook?*

A The only numbers in the phonebook will be frequently called numbers and will be the same for all call centres.

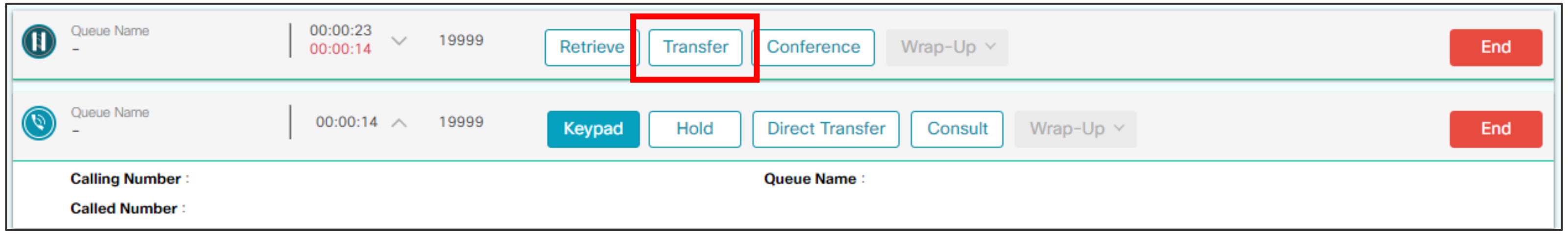
Looking for more Consult Transfer options select any of the links below to see more detail

- Consult Transfer
- Conference all parties to be on the one call
- Warm transfer a customer to a second party

CALL CONTROLS: CONSULT TRANSFER (3 OF 3)

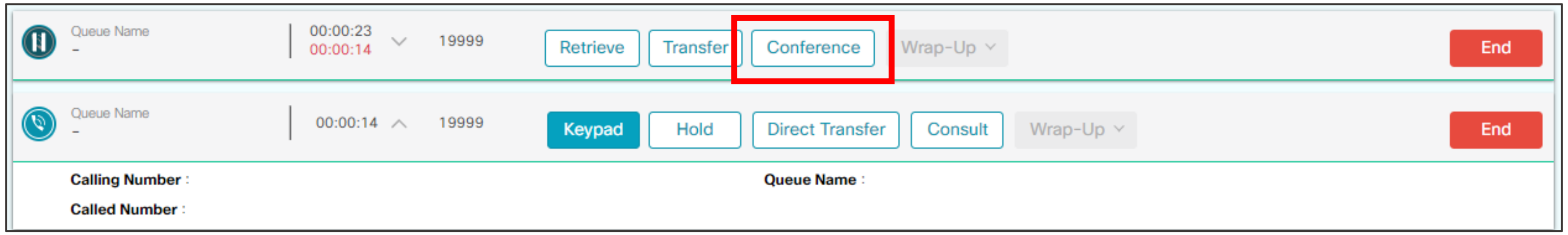
Warm transfer a customer to a second party

For when a customer is to be transferred to a second party (Warm), once the second party has answered and their call controls are visible, after an introduction and the passing on of any details, the user selects ‘Transfer’ against the call controls of the first party to complete the transfer. The user will automatically be dropped off the call and placed into the Wrap-Up Status.



Conference all parties to be on the one call

For the instance where the user, customer and second party are to be on one call together, the initial user can initiate this by creating a Conference. Press the ‘Conference’ button on the call controls for the customer or first party to commence this type of transfer.



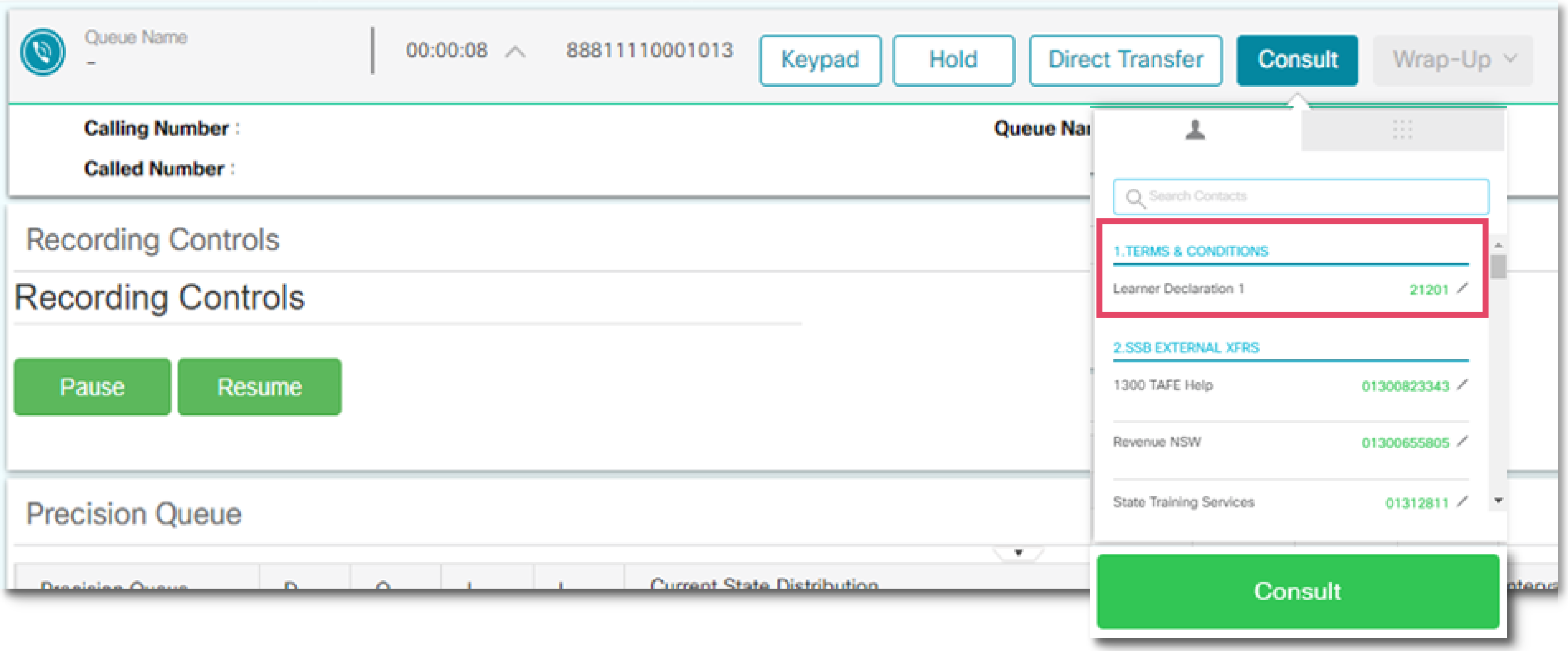
Throughout any type of transfer, the user can drop a party at any time by pressing the ‘End’ button on the far right of the call controls.

Looking for more Consult Transfer options select any of the links below to see more detail

- Consult Transfer
- Alternate Between the Two Parties

LEARNER DECLARATION

You will need to advise that I am going to put you through to the Learner Declaration. I will be there with you. At the end of this please feel free to ask any questions.



Frequently Asked Questions

Q *When do I need to put my customer through to the Learner Declaration?*

A Anything to do with enrolling a student. A Learner Declaration needs to be recorded before a student can be enrolled at TAFE NSW.

Q *Why do I need to do this as a Consult Transfer?*

A This needs to be done as a Consult Transfer so that the call comes back to you after the they have completed the Learner Declaration. If you use a Direct Transfer the call will end.

PLACING A CALL (OUTBOUND)

To place an outbound call, the user must be in a Not Ready state. If the user is Ready, they will need to change their status to Not Ready within the Status drop down and select the appropriate Not Ready code.

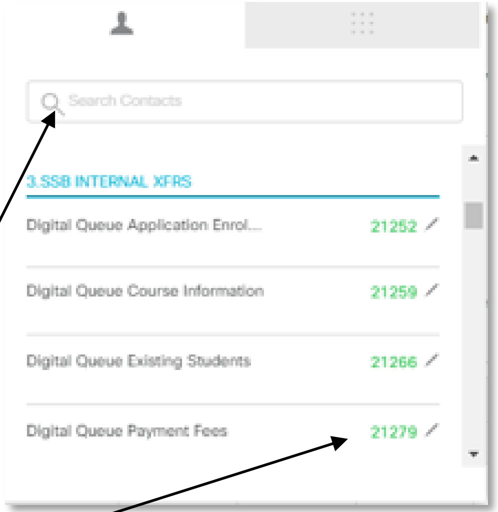
Click on this icon to make a New Call. This will open up an extra window with two tabs. A Phonebook with all users within the Contact Centre Operations and a Dialpad for internal contacts outside of the Contact Centre or external customers.

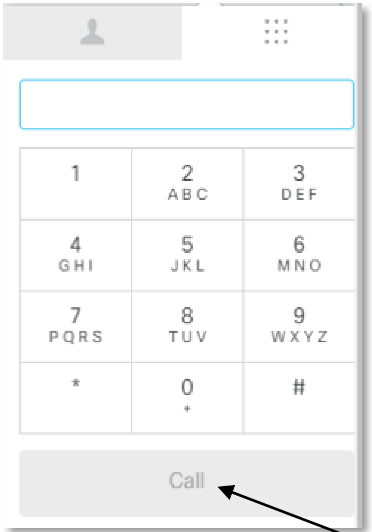
Phonebook

The only numbers in the phonebook will be frequently called numbers which will be the same for all call centres.

Instead of scrolling through the list, the user can search for a contact in the above search field.

Click on the green number to initiate a call. This will appear on Finesse interface with call controls.





Dialpad

To enter a number on the Dialpad, the user can either click on the digits present or manually type the number in the free text field above.

For external calls outside of the operations, an additional "0" (prefix) must be included at the beginning of the number.

The Call button will turn green where the user can commence an outbound call.

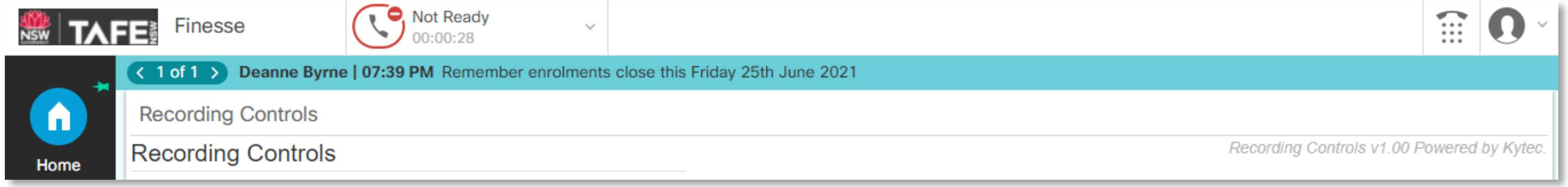
Frequently Asked Questions

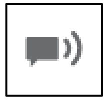
Q *Are calls recorded?*

A All calls in Cisco Finesse and Cisco Jabber are automatically recorded. For example if you make a personal call at lunch time using Finesse or Jabber this call will be recorded.

BROADCAST MESSAGING

Supervisors have the ability to broadcast a message within Finesse for users within their own team. Messages are helpful for user to provide real time updates without sending an email which may not be read. Once a message has been deployed, a user will see a blue bar across their screen displaying the content.





To setup a broadcast message, navigate to the Broadcast message icon on the top bar of Finesse. Click it.

1. **Compose a message**, 255 character limit. For messages currently active, the Supervisor can select 'Show Recent Messages' to delete.

2. **Select Teams** for who will see the message. The Supervisor will only be able to choose their own team. Supervisors are not able to broadcast a message to other teams where they aren't a member of.

3. Enter the **Duration** of the message – how long the message should be displayed for.

4. Click **Send** when finished to broadcast.

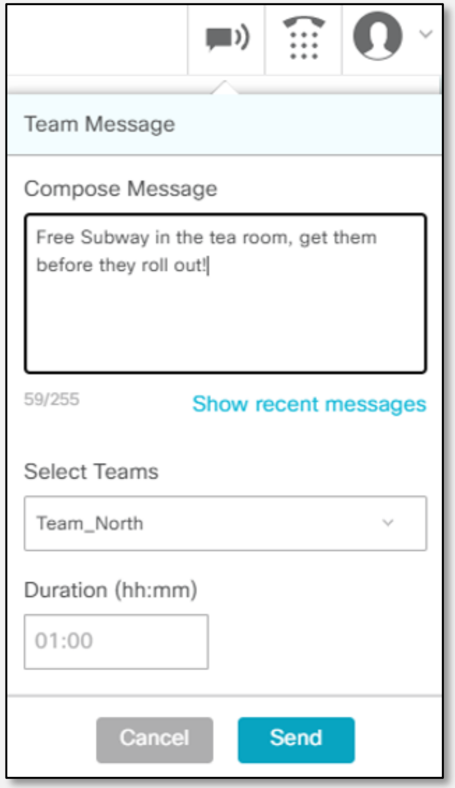
If multiple messages are active, the user can toggle between them using the arrows <> on the left of the blue bar.

Once the message has reached its duration, it will disappear.

Frequently Asked Questions

Q *Can anyone send a broadcast message?*

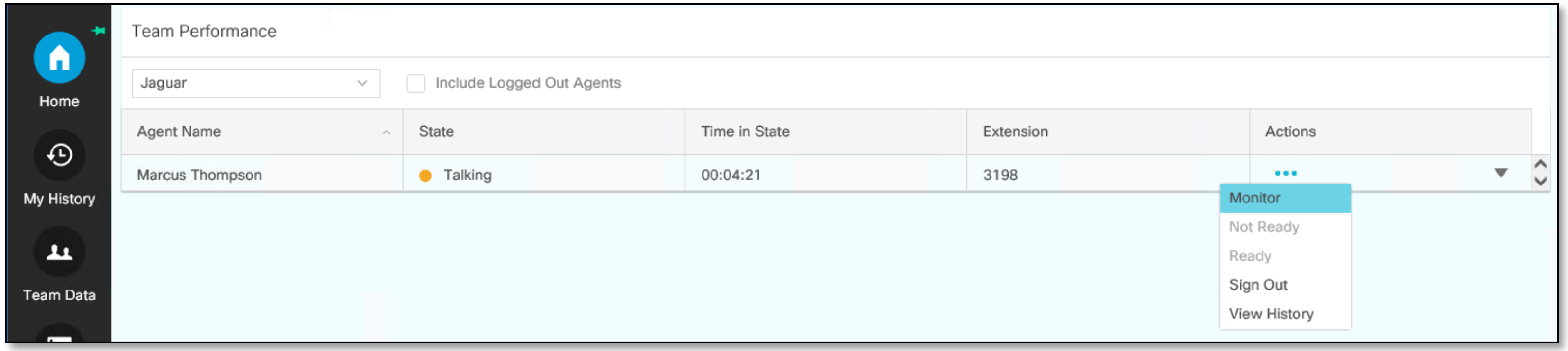
A No only Team Leaders and Contact Centre Managers will be able to send out broadcast messages.



AGENT MONITOR

Supervisors will be able to Silent Monitor any users within their team on active calls with the ability to barge into the call or take over.

To commence a silent monitor, the Supervisor will navigate to their Home tab, select the user they wish to monitor, click on the (…) and select Monitor from the dropdown. A user will need to be on an active call for the option to be enabled.



Finesse will begin to dial the Supervisors extension to join the call. Answer the call.

The Supervisor will see call controls of Hold, Barge In and End.

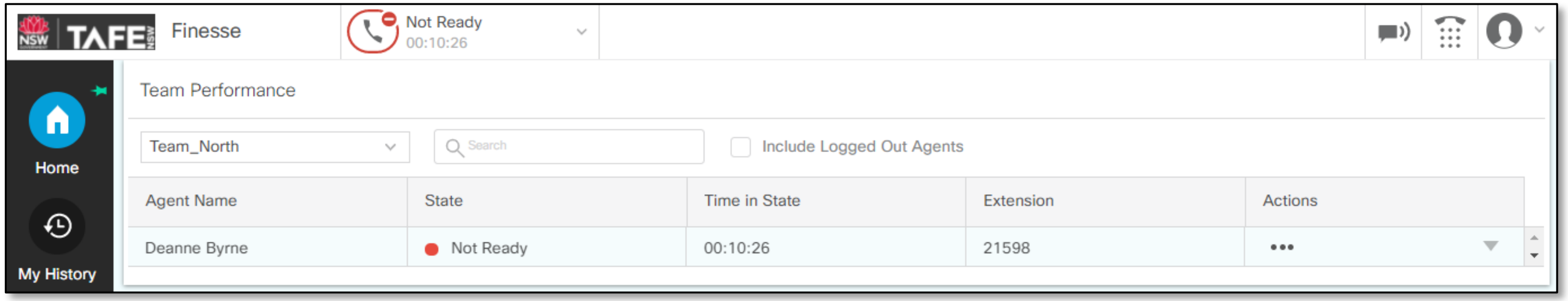
To barge in on a call, the Supervisor must press the Barge In button from the call controls where they will present as another party on the call. Anything said at this point will be heard from all three parties.

A Supervisor can takeover the call by selecting the Drop button where they will be able to exclude a party from the call.

REPORTS (1 OF 3)

Apart from the operations widgets, there are two ‘Out of the Box’ reports available for the user on the left side of the Finesse page.

Home - is the default widget for Supervisors and displays real time presence for all users within the Supervisor’s team, logged in or out.



Under the Actions header, Supervisors can select the (…) against the corresponding user to adjust the following.

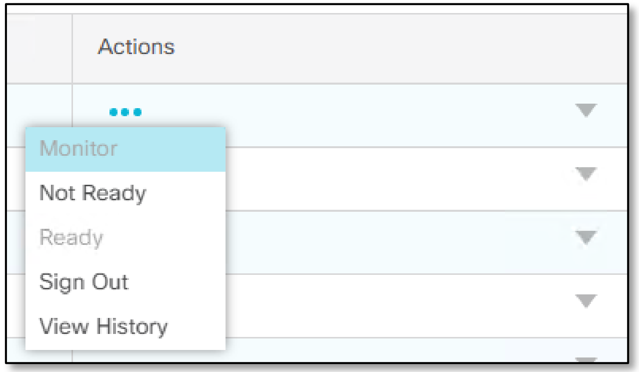
Monitor – silent monitor and call barge

Not Ready – to change a user to a Not Ready Agent State

Ready – to change a user to a Ready Agent State

Sign Out – to log out a user from Finesse

View History – to view a users call and presence history



Frequently Asked Questions

Q *Can I change the sort order of my reports?*

A Yes if you click on any of the headings you can sort your reports.

Q *What is the My Statistics Report?*

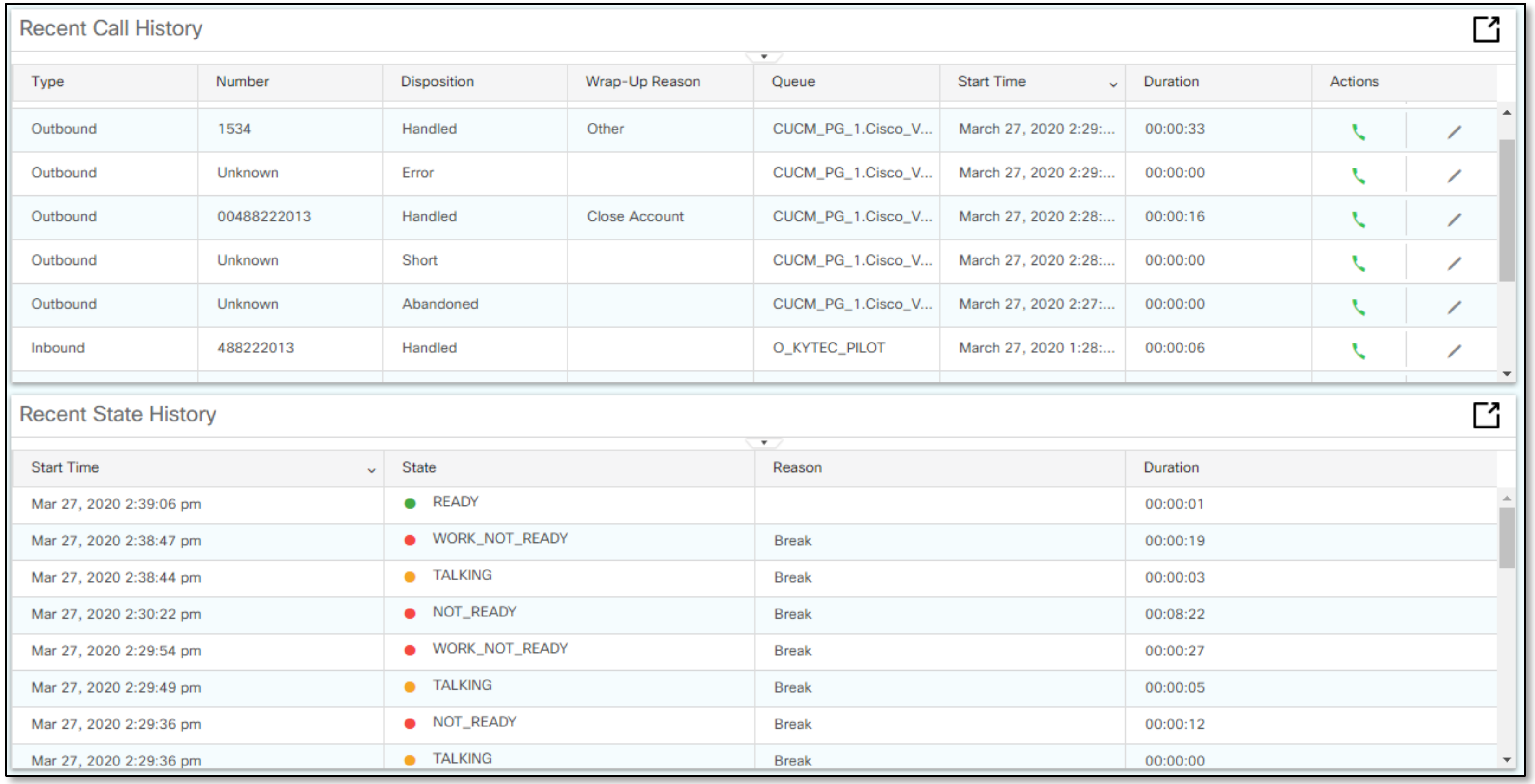
A If you want to check your statistics for the day you can look at this report.

Looking for more Report options select any of the links below to see more detail

- My History
- Team Data
- Queue Data

REPORTS (2 OF 3)

My History contains the user's Recent Call History and Recent State History during a logged in session. These reset once the users logs out. On the Recent Call History view, a user can select to call a previous number back by click on the green phone icon next to the contact.



Recent Call History

Type	Number	Disposition	Wrap-Up Reason	Queue	Start Time	Duration	Actions
Outbound	1534	Handled	Other	CUCM_PG_1.Cisco_V...	March 27, 2020 2:29:...	00:00:33	
Outbound	Unknown	Error		CUCM_PG_1.Cisco_V...	March 27, 2020 2:29:...	00:00:00	
Outbound	00488222013	Handled	Close Account	CUCM_PG_1.Cisco_V...	March 27, 2020 2:28:...	00:00:16	
Outbound	Unknown	Short		CUCM_PG_1.Cisco_V...	March 27, 2020 2:28:...	00:00:00	
Outbound	Unknown	Abandoned		CUCM_PG_1.Cisco_V...	March 27, 2020 2:27:...	00:00:00	
Inbound	488222013	Handled		O_KYTEC_PILOT	March 27, 2020 1:28:...	00:00:06	

Recent State History

Start Time	State	Reason	Duration
Mar 27, 2020 2:39:06 pm	READY		00:00:01
Mar 27, 2020 2:38:47 pm	WORK_NOT_READY	Break	00:00:19
Mar 27, 2020 2:38:44 pm	TALKING	Break	00:00:03
Mar 27, 2020 2:30:22 pm	NOT_READY	Break	00:08:22
Mar 27, 2020 2:29:54 pm	WORK_NOT_READY	Break	00:00:27
Mar 27, 2020 2:29:49 pm	TALKING	Break	00:00:05
Mar 27, 2020 2:29:36 pm	NOT_READY	Break	00:00:12
Mar 27, 2020 2:29:36 pm	TALKING	Break	00:00:00

Frequently Asked Questions

Q *How do I find a number for a customer if the call drops off?*

A If you go to the Recent Call History report you will be able to find this. Remember to click on the column headings to sort this if you need to. You can use the green button beside the call history entry to direct call the customer if needed.

Looking for more Report options select any of the links below to see more detail

- Reports Home
- Team Data
- Queue Data

REPORTS (3 OF 3)

Team Data currently displays statistics for all users within the Supervisor's Team.

Agent Summary

Agent	State	Logge...	Ready...	Not R...	% Not...	Handl...	Avg H...	Avg H...	Avg H...	Avg ...	Total ...	% Wra...	Other ...
UAT01, K...	Logged Out	06:48:09	00:44:59	05:54:12	86.8%	1	00:00:04	00:00:04	00:00:00	00:00:00	00:00:00	0%	00:06:12
UAT02, K...	Logged Out	02:34:13	01:33:43	00:53:32	34.7%	0	--	--	--	--	00:00:00	--	00:03:41
UAT03, K...	Logged Out	00:00:00	00:00:00	00:00:00	--	0	--	--	--	--	00:00:00	--	00:00:00
Byrne, De...	Not Ready	00:16:11	00:00:00	00:16:11	100%	0	--	--	--	--	00:00:00	--	00:00:00
Allouche, ...	Logged Out	00:00:00	00:00:00	00:00:00	--	0	--	--	--	--	00:00:00	--	00:00:00
Burgemei...	Logged Out	00:00:00	00:00:00	00:00:00	--	0	--	--	--	--	00:00:00	--	00:00:00
Dwyer, Ja...	Logged Out	00:00:00	00:00:00	00:00:00	--	0	--	--	--	--	00:00:00	--	00:00:00

Queue Data displays real time statistics for the all queues the Supervisor is responsible for. The statistics will update every 15 seconds.

Queue Statistics

Queue Name	# Calls	Max Time	Ready	Not Ready	Active			WrapUp	
					In	Out	Other	Ready (Pending)	Not Ready (Pendi...
PQ_Payment_Fees_Noi	0	00:00:00	0	1	0	0	0	0	0
PQ_PILOT01	0	00:00:00	0	1	0	0	0	0	0
SG_OB_Course_WebEr	0	00:00:00	0	0	0	0	0	0	0
SG_PILOT01	0	00:00:00	0	0	0	0	0	0	0

Frequently Asked Questions

Q *How do I find a number for a customer if the call drops off?*

A If you go to the Recent Call History report you will be able to find this. Remember to click on the column headings to sort this if you need to. You can use the green button beside the call history entry to direct call the customer if needed.

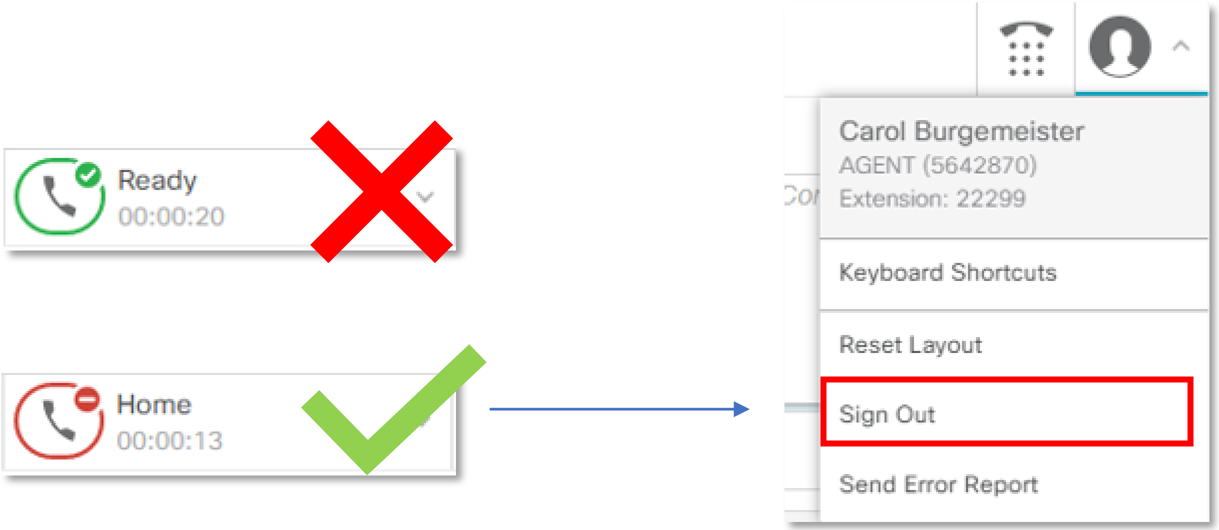
Looking for more Report options select any of the links below to see more detail

- Reports Home
- My Statistics

IDENTITY GADGET - SIGNING OUT

At the end of a users shift or when they want to log out of Finesse, navigate to the Identity Gadget to the far right of the application.

Before a user can sign out, they must be in a Not Ready Home status. If the user is currently in Ready the option to sign out will be disabled.



If the user closes the current tab or entire browser, they will remain logged in still where their statistics could be affected.

Frequently Asked Questions

Q *How do I sign out correctly?*

A You need to choose Not Ready status Home from the Status drop down list. Then you go the Identity Gadget (your picture at the top right hand corner) and choose Signout.

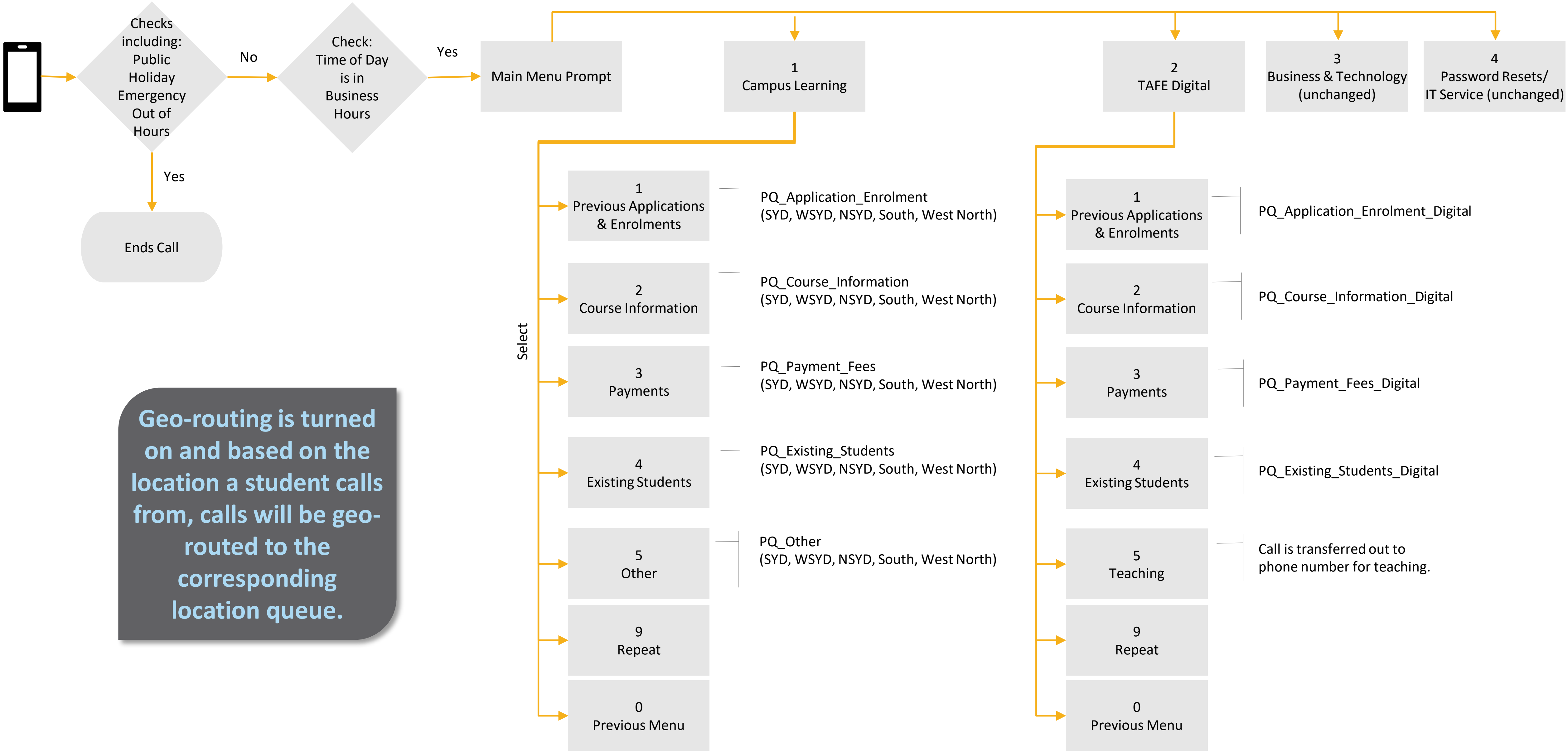
Q *I can't signout why not?*

A Have you set your Status as Not Ready status Home in the Status drop down list? If you have and still can't signout please talk to your Team Leader or Manager.

Q *What happens if I don't sign out?*

A Team Leaders and Contact Centre Managers have the ability to sign out. However if you leave your status as Ready you will be assigned a call and then go into status Call Not Answered.

131 601 CALL FLOW



To support you through the coming months, as we transition to the future Student Services with new ways of working, capability resources and sessions have been developed.

You can learn more about it [here](#).