Finesse Supervisor Quick Reference Guide

Log into Finesse

1. Access the University at Albany Finesse website: https://cucm-cx-p101.uc.albany.edu:8445/desktop
2. Your NetID may auto populate. If not, enter it in the first field of the form.
3. Enter the password you use with your NetID.
4. Enter the extension of the phone you will answer.
5. Click the “Sign In” button.

Finesse Supervisor Interface

Make yourself “Ready” or “Not Ready” to take calls.

List of all Agents on your team & their current status.
To Answer Queued Calls, Make Yourself Ready

(1) When you log in your status is set to “Not Ready” by default.
(2) When you are ready to take calls, click the drop down next to the “Not Ready” status at the top of the interface.
(3) Choose “Ready”. You will now be sent calls as they come into the queue.
(4) To take yourself out of the queue (calls will not ring to you), choose “Not Ready” from the same drop down.

*NOTE* You must make yourself “Not Ready” before logging out of the application.

For Call Handling information, please review the Finesse Agent Quick Reference Guide.

Team Message

Click to compose a group message to the Agents on your team, sent via Finesse.

Access the Dial Pad

When you are logged in, the option to dial calls from your computer is in the upper right corner of the interface.

Click the dial pad icon to type, click, or paste a phone number into the dial field. Select “Enter” to dial the number.

Log Out of Finesse

When you are ready to log out, make sure you are in the “Not Ready” state, then click the drop down next to the person icon, choose “Sign Out” and close your web browser.
Left Hand Tabs

The tabs on the left side of the interface allow you to view different aspects of your individual activity and your team’s activity in Finesse.

**Manage Team:** The default view when you log into Finesse. Shows Team Performance information and the current status of each Agent on your team.

**My History:** View your Recent Call and Recent State history for the day.

**Team Data:** Shows the State, Time in State, Extension, and Actions that can be taken for each Agent on your team.

**Queue Data:** Displays a summary report for the queues you have supervisory rights to, including Agent States of: Logged In, Talking, Ready, Not Ready, After Call Work, and Reserved.

**Advanced Capabilities:** Click the Advanced Capabilities tab to review and manage the Finesse calendar for your team.

Actions

Use the Team Performance gadget to change the state of an Agent to “Ready”, “Not Ready”, or to sign them out.

From the “Manage Team” tab, choose an Agent whose state you need to change.

In the Actions column of the selected Agent, select the 3 dots icon and choose the new state: Monitor, Not Ready, Ready, Sign Out, or View History.
Monitor a Call

You must be in the “Not Ready” state to monitor an agent. You can monitor one agent at a time.

Locate the Agent you want to monitor. From the “Actions” column, select the 3 dots icon and choose “Monitor”.

The Silent Monitor Call appears in the call control area of the interface.

While you are monitoring, the following options are available:

**Hold:** Place the call on hold

**Retrieve:** Retrieve the call placed on hold.

**Barge In:** Barge into the call. The call becomes a conference call between you, the Agent, and the caller.