Cisco Finesse - agent & supervisor setup

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Finesse Agent Setup Procedure

Before logging into Finesse (https://ccxpub1.campus.mcgill.ca:8445), the following conditions must be met.

**For Cisco hard phone installations (Cisco IP Phone):**
1. Cisco IP Phone has been installed at your workstation by a McGill NCS technician.
2. Agent has been logged into the Cisco IP Phone using his/her McGill Short Username

**For Cisco soft phone installations (Cisco IP Communicator):**
1. Jabra BIZ 2300 USB headset is connected to your PC.
2. Cisco IP Communicator is installed and properly configured.
3. Agent has been logged into IP Communicator using his/her McGill Short Username.

**Note:**
You can only be logged into one Cisco phone, be it a hard phone or a soft phone, at any given time.
Logging into Cisco IP Communicator (“Soft phone”)

STEPS:

1. **Double-click** Cisco IP Communicator short-cut on the Desktop

IP Communicator will now launch. Notice the “4846XXX” extension in the upper right-hand corner (screen-shot below): This means no one has logged into this phone yet.
Note:
Before continuing, verify IP Communicator settings.

Right-click and select Preferences..
The first radio button (1) should be selected in the **Device Name** section. Your network adapter (2) should be selected in the drop-down list.

Click **OK**.
2. To sign-in, click on the **second round button** on the top-right.
3. Now enter your **McGill short username** and your temporary password (12345).

Click **Submit**.

**Note:**
Use the **Tab** key to go to the next line.
You have successfully logged yourself into IP Communicator. Notice the “4848XXX” extension on the top-right.

Important:
You must now change your temporary password.
4. To change your password, once again click the second round button on the top-right.

The following screen will appear:

![Cisco phone screen](image)

To change your password (PIN), click Set PIN.
5. Enter your **Current PIN** (12345).
Now enter your **new PIN** (pick a secure password) and confirm your PIN once again.

Click **Change**.

Your software is now well configured and you can log into Finesse.
Logging into Cisco IP Phone ("hard phone")

Pre-requisite:
IP phone has been setup at your desktop by an NCS technician.

The phone displays a 4846XXX extension number in the upper-right hand corner of the screen.

STEPS:

1- Click on the button located to the left of the “Sign In/Out” text.
2- Enter your McGill short username and default temporary password (12345) and click Submit.

Note:
Use the “circle” navigation button to go to the next line.

The screen should display “login successful” and the phone will now re-boot.
Your real extension number should now appear in the upper-right quadrant (4848XXX).

3- To change your default password, once again click on the button located to the left of the “Sign In/Out” text.

The following screen will appear:

Click on Set PIN

**Note:**
In some instances, you can be prompted to reset your PIN right after your initial login.

4- Enter your old PIN (12345) and new password twice.

Click on Change

Your hard phone is now well configured and you can log into Finesse.
Logging into Finesse

**STEPS:**

**Access Finesse URL**

1. Open Internet Explorer and type the address of the McGill Finesse website:

**Typing in login credentials**

2. Follow instructions below

   ![Cisco Finesse login form](image)

   **Legend:**
   
<table>
<thead>
<tr>
<th>ID*</th>
<th>Enter <strong>McGill short username</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Password*</td>
<td>Enter your McGill password</td>
</tr>
<tr>
<td>Extension*</td>
<td>Enter your phone extension number</td>
</tr>
</tbody>
</table>

3. Click **Sign In**.
Resetting your Cisco “hard phone”

If for some reason, your Cisco IP phone will not load up i.e. your phone is “turned-on” but never actually displays the regular main screen which should display a 4846XXX number (user is not logged into the phone) or 4848XXX number (user is logged into the phone), try resetting the phone manually.

STEPS:

1. Locate the **Configure** button and click on it

2. Scroll down to the “**5 Admin Settings**” section (use “circle” navigation button) and select it by pressing the “inner circle” area of the “circle” navigation button.
3. Scroll down the list and select the “4 – Reset Settings” option by once again pressing the “inner circle” area of the “circle” navigation button.

4. Select the “All” option

5. The phone will now reboot and re-initialize.

The phone should now display the default main screen once again.
Additional Resources

CISCO IP COMMUNICATOR USER GUIDE
CISCO IP PHONE QUICK START GUIDE