AGENT TRAINING USER GUIDE

Instant Chime for Microsoft Lync©

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Introduction

This document is designed to help those who are configured as agents in the process of learning how to use Chime. We will provide information on how to accept chat requests from customers, viewing the agent dashboard and individual chat history, directions on how to install the agent context window, as well as instructions for utilizing the context window and its various functions and features.

Agent Dashboard

The Agent Dashboard is a tool that gives an agent a lot of information about the chats that they have taken and their statistics. When you first navigate to the Agent dashboard, you will see information about your Chime state, the queues you are in, and Agent Skill Tags that you have. To get information about a specific queue you are in, simply click the **View Dashboard** link for the queue you would like to see.
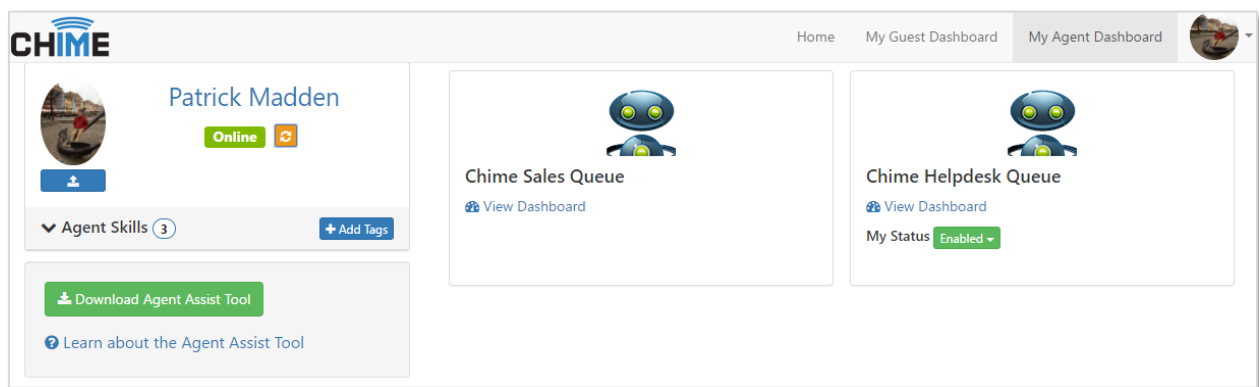

Figure 1: Queue Dashboard Landing Area

Enabling/Disabling yourself in Queues

Often time's queues will allow Agents to set their Chime status on the Queue Dashboard. In the image above, you can see that the Chime Helpdesk Queue has a My Status option underneath the "View Dashboard" link and the Chime Sales Queue does not have the My Status option underneath it. Some queues will support this feature, and some will not. Using the My Status feature allows you to set your status for the Queue as **Enabled** or **Disabled**.

The **Enabled** Status is what an Agent should be in most of the time. When in an enabled state, the Agent can receive chats, and will actively be getting new chats after they end an existing chat.

Changing your status to **Disabled** in Chime does two things- it removes you from the pool of Active agents who can receive chats and allows you to start a chat with the queue. This is mainly used if an agent is away from their desk or needs to message their own queue for testing purposes.

In the Agent Dashboard you can see the statistics for your chats over time and your Lync/Skype for Business status on the grey bar spanning the page. Below that, you will see information about the Queue. The online/offline status of the queue will be displayed there along with four tabs with information about the agents in the queue: Active, Agents Online, View History, and Legacy Dashboard.

Active:

The Active tab shows information about the active chats you currently have. In this section you will be able to look at the context window for any of the current chats you are in and use any of the features it provides. For the full list of features and uses of the Agent Context Window, refer to the *Using the Agent Context Window* section.
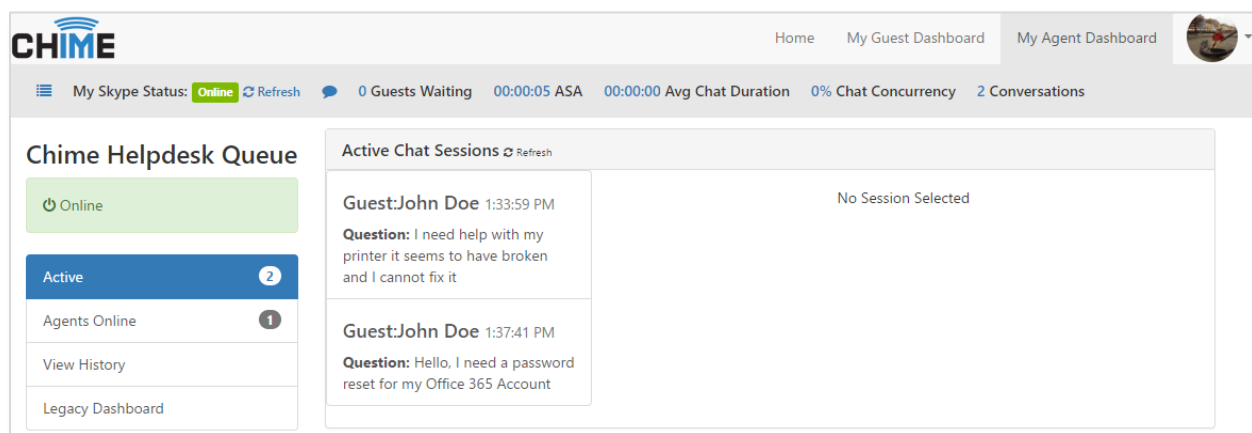
Figure 2: Active Sessions
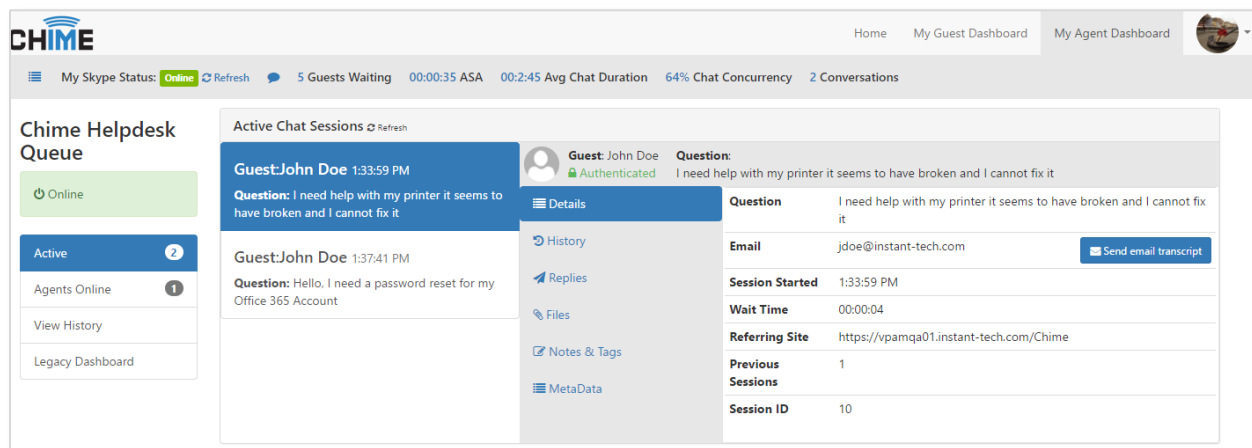
Figure 3: Active Sessions Drilldown

Agents Online:

The Agents Online tab shows you which agents in the queue are Available to take chats and which ones are Unavailable. This is helpful for agents to gauge how many chats they will be getting based on the number of waiting guests and the number of other agents online in the queue.
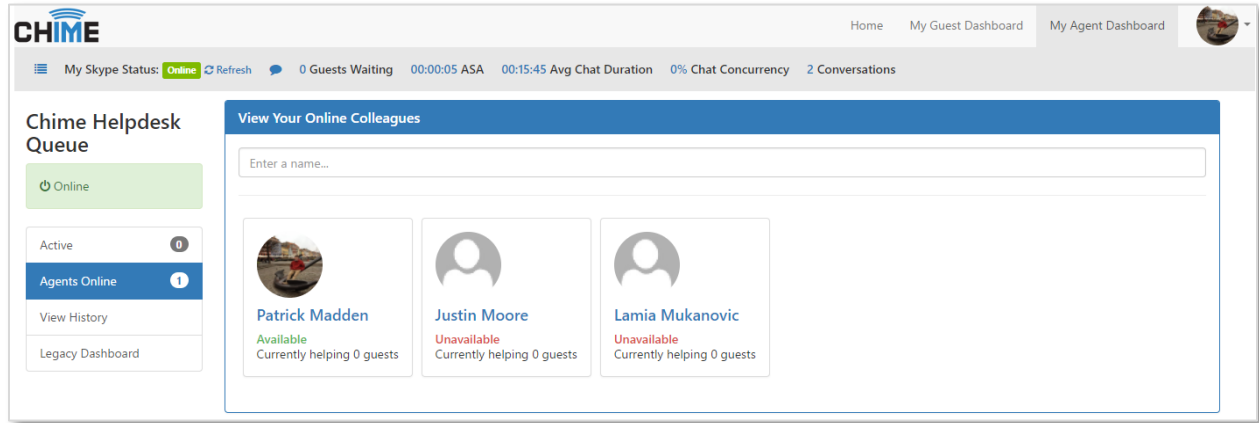

Figure 4: Available Online Agents

View History:

The View History tab allows agents to look at previous chat sessions that they had and look at the session details. You are able to add tags, comments and change from resolved/unresolved from this area. To look through the details of a Chat, simply click the **View Details** button on the row the chat is on.
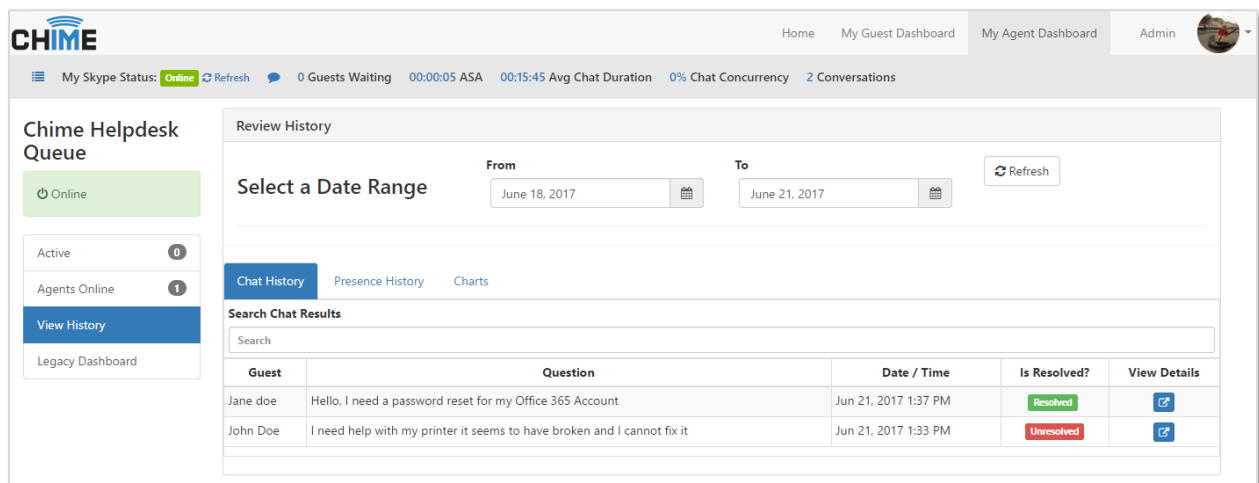
Figure 5: Chat History

Legacy Dashboard:

The Legacy Dashboard tab brings you to the old Agent Dashboard. It is not recommended to use unless you have already learned how to use it in the past.

Installing the Agent Context Window

The Agent Context Window is a very powerful tool that assists Agents in helping the Guests who are routed to them. This context window provides the basic details for the Guest, their previous chat history, pre-defined replies, file upload, a tagging system and comment system so an Agent can give feedback, and a feature that automatically opens up chat requests from Chime Queues.

Follow these instructions to install and enable the agent context window in Lync:

1. **Log in** to the Chime application using your domain credentials (URL will look something like this: < *SERVER_ADDRESS/Chime* >)
2. Click on the '**Download Agent Assist Tool**' button from the Agent Dashboard.
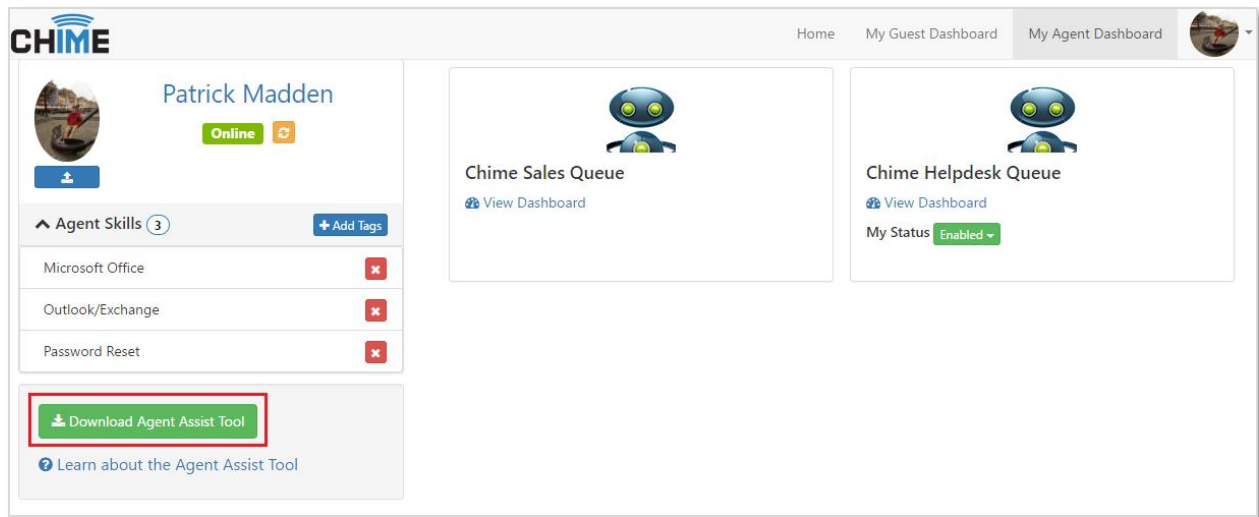
Figure 6: Download Agent Assist Tool Setup

3. Click '**Run**' when prompted to run or save '**AgentAssist_Translation_v20.msi**' within the browser, or navigate to the downloads folder on your computer and run the '**AgentAssist_Translation_v20.msi**' file.
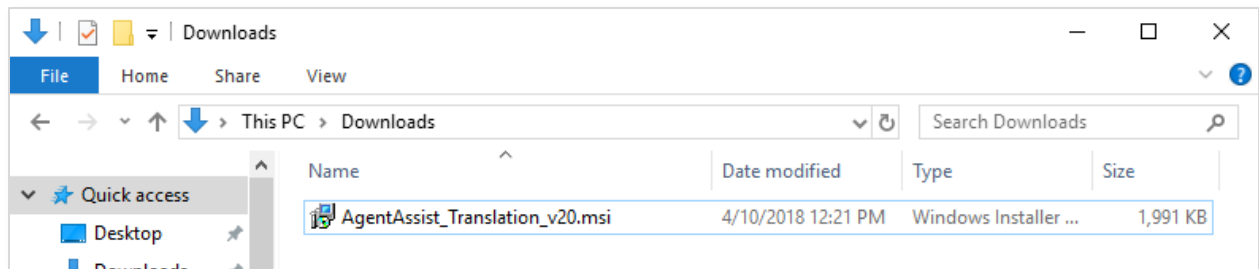
Figure 7: Agent Assist Tool Download Location
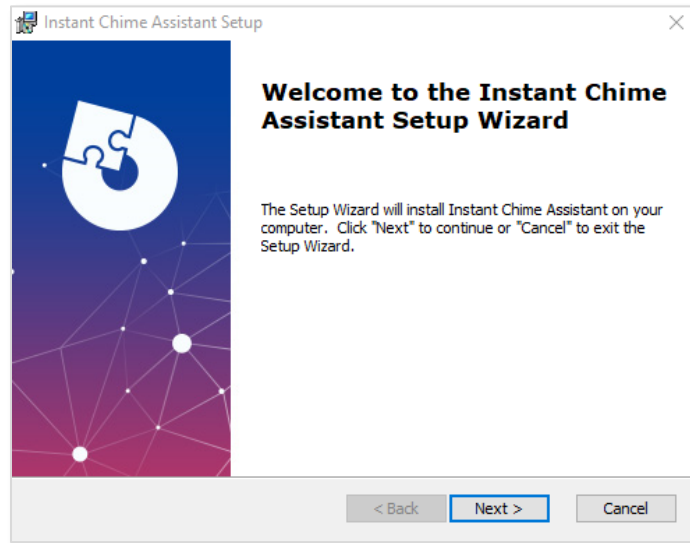
4. Click **Next.**

Figure 8: Installer First Page

5. If you would like to change the folder that the Agent Assist Tool is installing to, click **Browse** and choose the folder you want to install to.
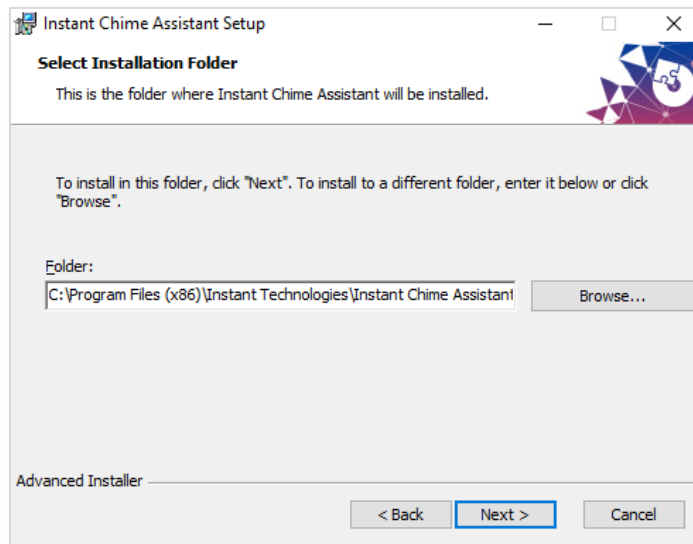6. Click **Next**.

Figure 9: Install Directory Picker
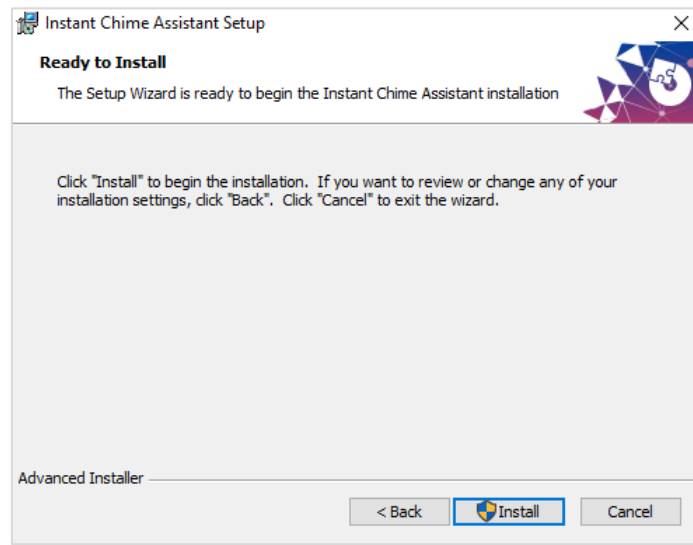
7. Click **Install**.

Figure 10: Install Confirmation Page

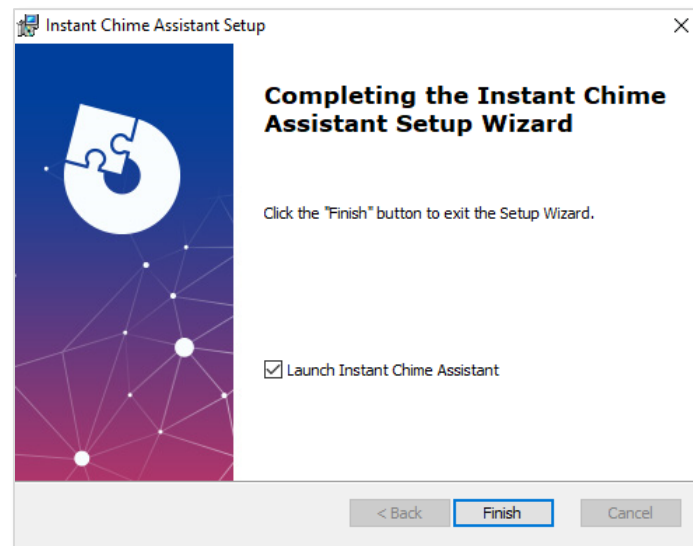8. When the installer completes the install, click **Finish**.

Figure 11: Installer Finish Page

9. The Assist App will appear on the system tray**. Right-click** it and then click on S**ettings**.
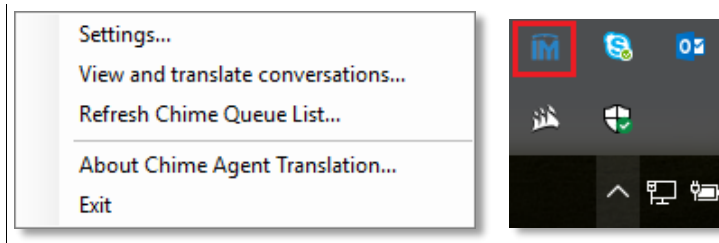
Figure 12: Agent Assist Tool System Tray

10. This will bring up the settings for the Agent Assist Tool Settings. In the Chime Server URL area, enter the Server URL where Chime is located. **Note: make sure you include "/chime/"**
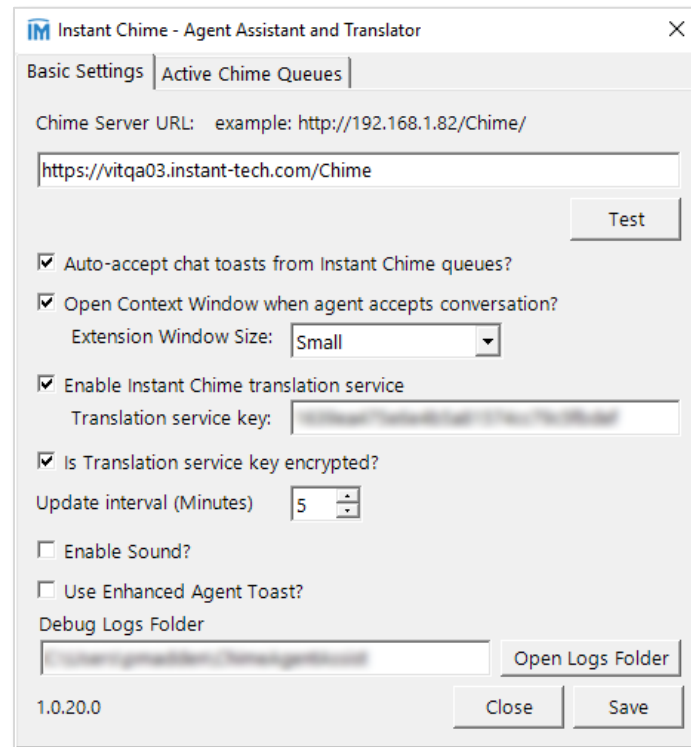

Figure 13: Agent Assist Tool Settings

11. If you want chat messages to open automatically from the queues, check the box that says "Auto-accept chat toasts from Instant Chime queues?"
12. If you want the Context window to open every time you accept a chat, check the box that says, "Open Context Window?"
    - Choose the size you want the context window to be: Small, Medium, or Large.
13. If your organization is using the translation feature you must check the box that says "Enable instant Chime translation service" as well as enter in the Translation service key in the textbox associated with it.
14. If your organization is going to encrypt the service key, check the "Is Translation service key encrypted?" setting
15. The update interval option determines how often the Agent Assist Tool checks the Queue's presence. It is recommended to keep it at 5.
16. The "Enable Sound?" checkbox allows you to choose if you want sound notifications when getting messages from Chime.

17. The "Use Enhanced Agent Toast?" setting allows you to enable a feature that will automatically open up chat requests and use buttons to accept and decline instead of typing "y" or "n".
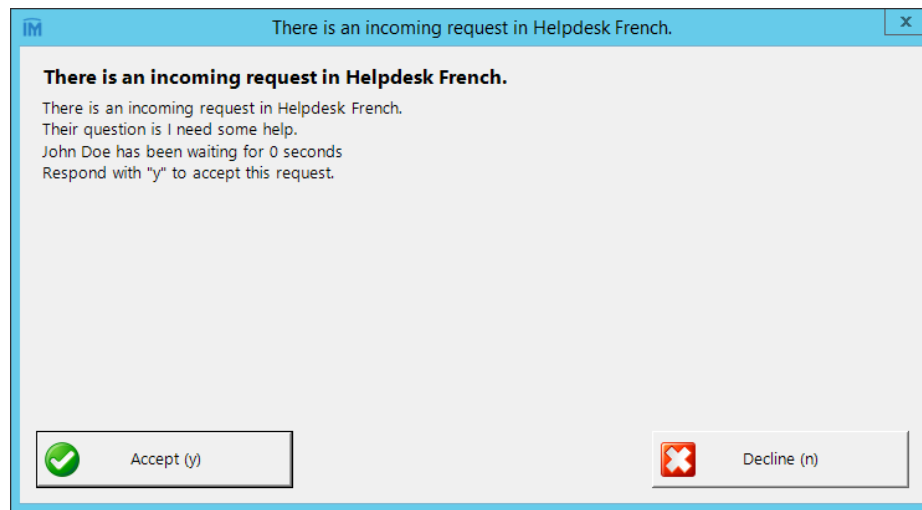
Figure 14: Enhanced Agent Toast

18. Click the **Save** button on the bottom right of the window.
19. Click on the **Active Chime Queues** tab.
20. Click the **Refresh Queue List From Server** button and make sure that all of the queues you are in show up in the list.
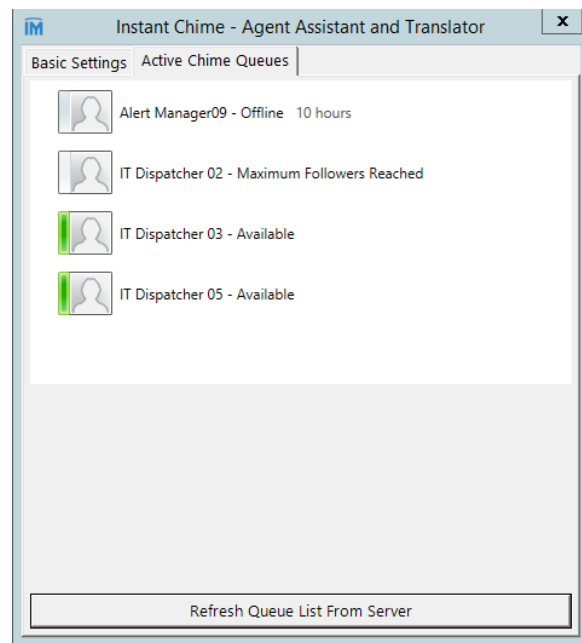

Figure 15: Refresh Queue List

21. Close the Agent Assist Tool Settings Window.
22. The setup of the Agent Assist Tool is complete.

Accepting a Chat Request

As an agent who will be helping customers or guests in Chime, you will be prompted in your Lync client with notifications of requests. To accept requests, you must be signed in to your Lync client and your status must be available.
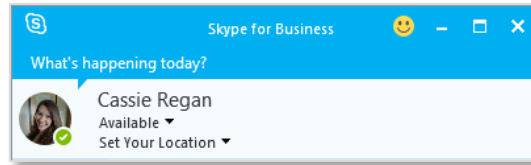
Figure 16: Agent online and available

Follow these steps to accept a chat request:

1. **Click on the blue notification** in the bottom corner of the screen to open the chat window with the Chime dispatcher. If you have the Agent Assist Tool installed, this will automatically open.
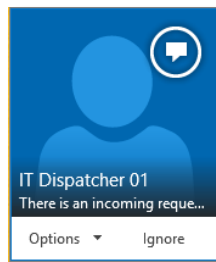
Figure 17: Chat Notification

2. Type **'y'** in the new chat window to accept the chat request. **Note: You are not connected with the guest yet, you must type 'y' to accept it first.**
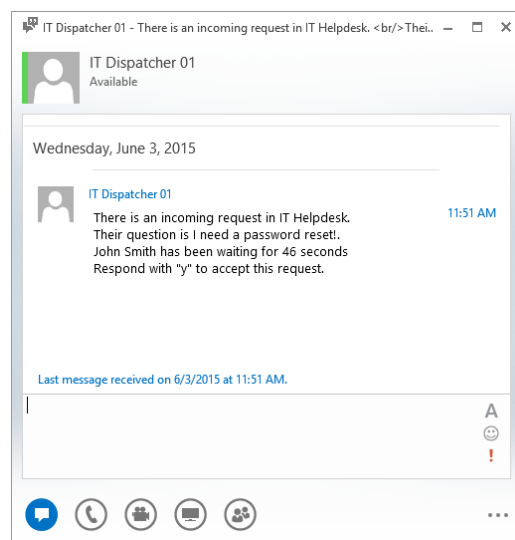
Figure 18: Incoming Request

3. You will receive a second notification for a group chat in the corner of your screen. Click on this notification to open it. If you have the Agent Assist Tool installed, this will automatically open. **Note: This window is where you will be connected with the guest and you will be able to chat with them.**
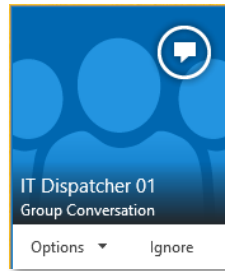

Figure 19: IM notification

4. **A second IM window will be opened** where you are joined into a conference with the guest and the Chime dispatcher. You are now connected with the guest. You should see their question, and you can now chat with them.
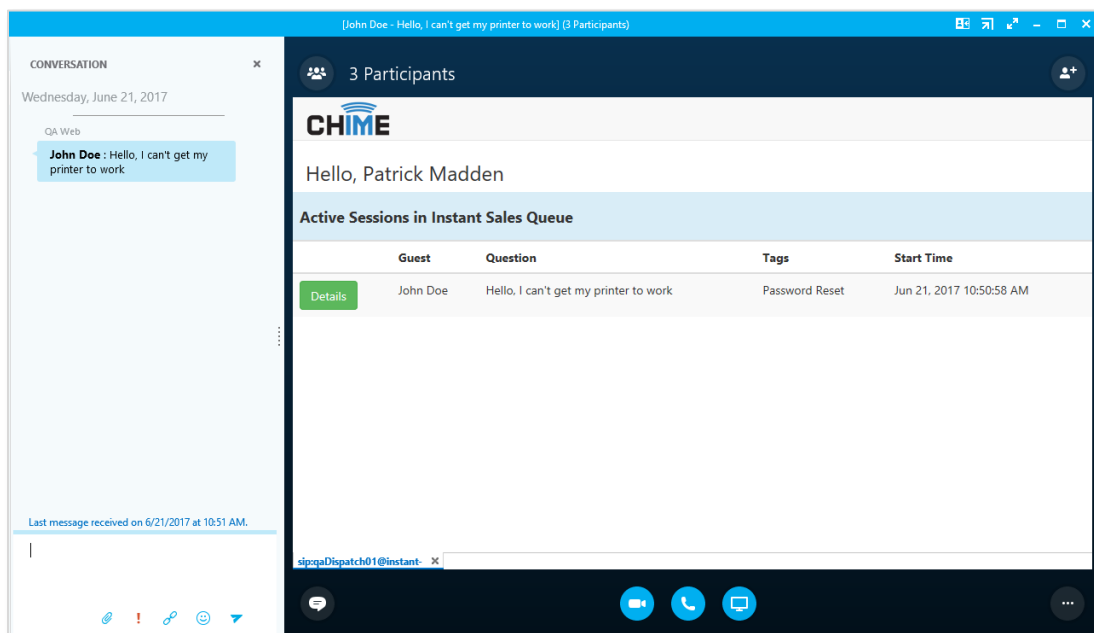
Figure 20: Guest and agent chat window
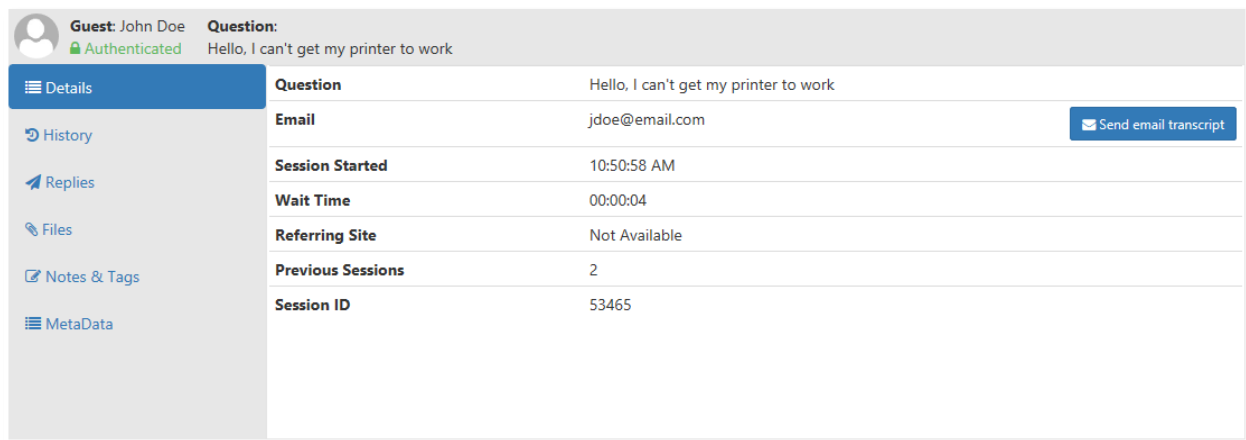
5. If you are using the Agent Assist Tool, the context window will open when you connect to the guest. There is a table that will show you the active sessions you have. To start using the Agent Context Window, click the **Details** button for the session you are currently in. **Note: you can identify the session you are in by looking at the name of the guest in the conversation history to the left of the Context Window.**
6. To end a chat session, simply close the Lync/Skype for Business conversation window.

Using the Agent Context Window

There are six tabs in the agent context window: Details, History, Standard Replies, Files, Notes & Tags, and MetaData. This section will go over each tab and all of the features and functions available to agents in the context window.

Details

The Details tab is the first tab that an agent sees in the context window when connected with a guest. This window shows details about the guest or customer, such as their full name, question, contact information, and wait time.
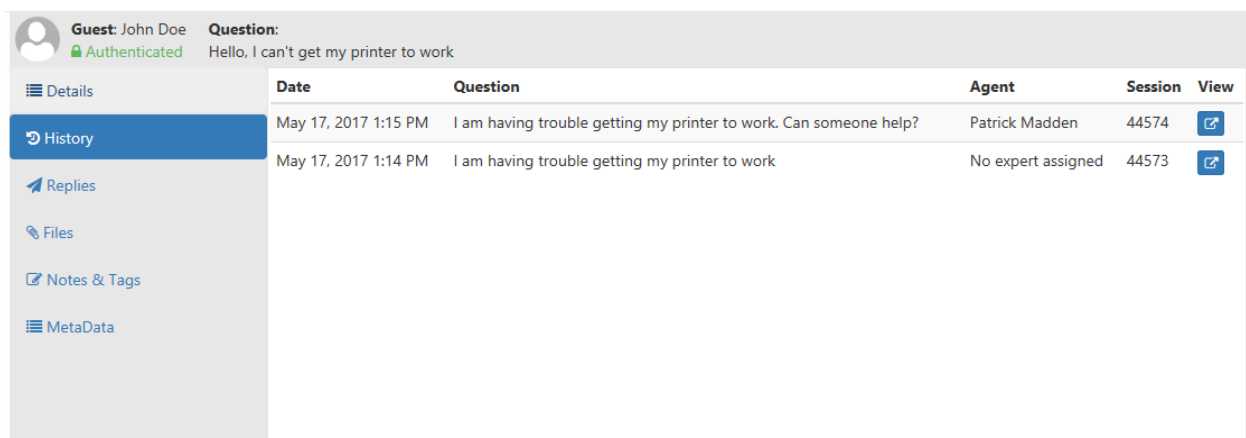
Figure 21: Details Tab

History

The History tab shows the previous questions that the guest has had. **Click on the** [button icon] **button** to view previous chats that the guest has had.
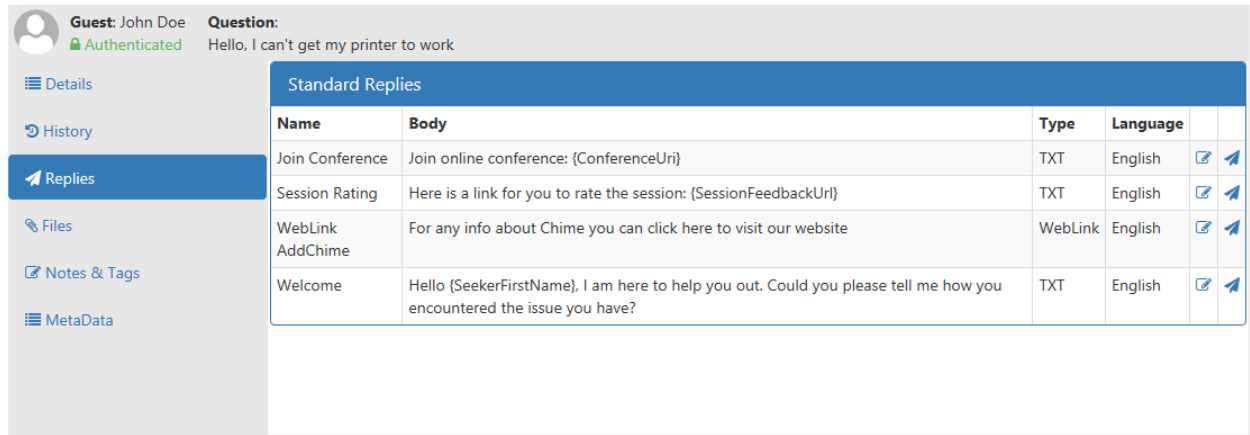
Figure 22: History Tab

Replies

In the Standard Replies tab, agents have access to the standard replies that have been added to the queue that they are in. **Click on the** ⬈ **button** to send a standard reply message to a customer. Additionally, you can **click on the** ☑ **button** to edit the standard reply before you send it. **Note: Standard replies must be added to queue settings by a manager or administrator.**

	Guest: John Doe 🔒 Authenticated	Question: Hello, I can't get my printer to work				
☰ Details	**Standard Replies**					
🕑 History	**Name**	**Body**	**Type**	**Language**		
⬈ Replies	Join Conference	Join online conference: {ConferenceUri}	TXT	English	☑	⬈
⬉ Files	Session Rating	Here is a link for you to rate the session: {SessionFeedbackUrl}	TXT	English	☑	⬈
☑ Notes & Tags	WebLink AddChime	For any info about Chime you can click here to visit our website	WebLink	English	☑	⬈
☰ MetaData	Welcome	Hello {SeekerFirstName}, I am here to help you out. Could you please tell me how you encountered the issue you have?	TXT	English	☑	⬈

Figure 23: Replies Tab

Files

Any files that have been uploaded in the chat will be located in the Files tab. Agents have the ability to send documents and pictures to customers, and customers can send files to agents as well. **Click on the 'Upload' button** to send a file to a guest. Click on the 'Refresh' button to reload the list of files, if any have been uploaded.

	Guest: John Doe 🔒 Authenticated	Question: Hello, I can't get my printer to work	
☰ Details	**Uploaded Files**		
🕑 History	**File Name**		**Download**
⬈ Replies	Instructions-to-fix-printer.txt		⬇ Download File
⬉ Files	⬆ Upload		⟳ Refresh
☑ Notes & Tags			
☰ MetaData			

Figure 24: Files Tab

Notes & Tags

In the Comments & Tags section, agents can mark sessions as resolved as well as attach session tags to the session. Resolved/unresolved, session tags, and comments will all show up in chat history.

Click on the 'Unresolved' button to toggle and change a session to 'Resolved'.
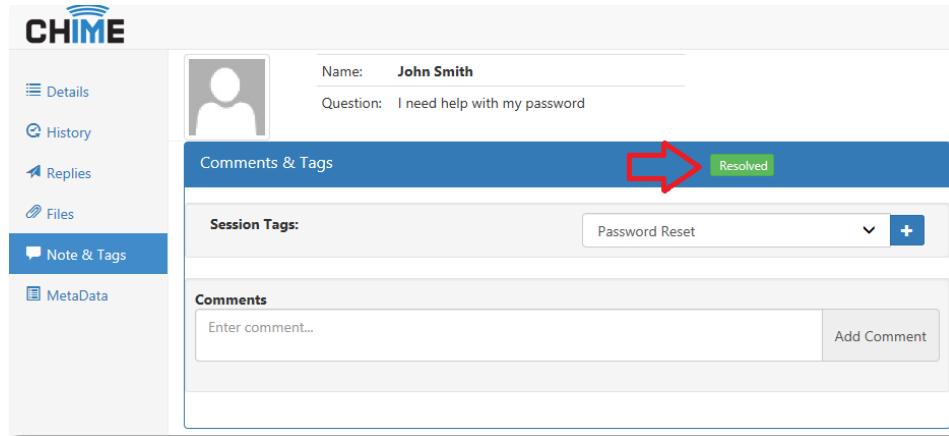
Figure 25: Notes & Tags Tab

Click on the Session Tags drop-down menu and pick a tag that fits the nature of the chat session. Then click the + button to attach the tag with the session.

Add a comment that describes what actions the agent took, or additional issues that the guest had. Ex: *I gave him a password reset and he is all set now, I gave her a license key for Microsoft Office…*

MetaData

The MetaData tab is used to track information about the chat such as where the guest started their chat from or what skill tags they are using. This is generally in here for Virtual Agents to use, so it is not common for an agent to use this tab in chat conversations.

Figure 26: MetaData Tab

Concurrent Chats

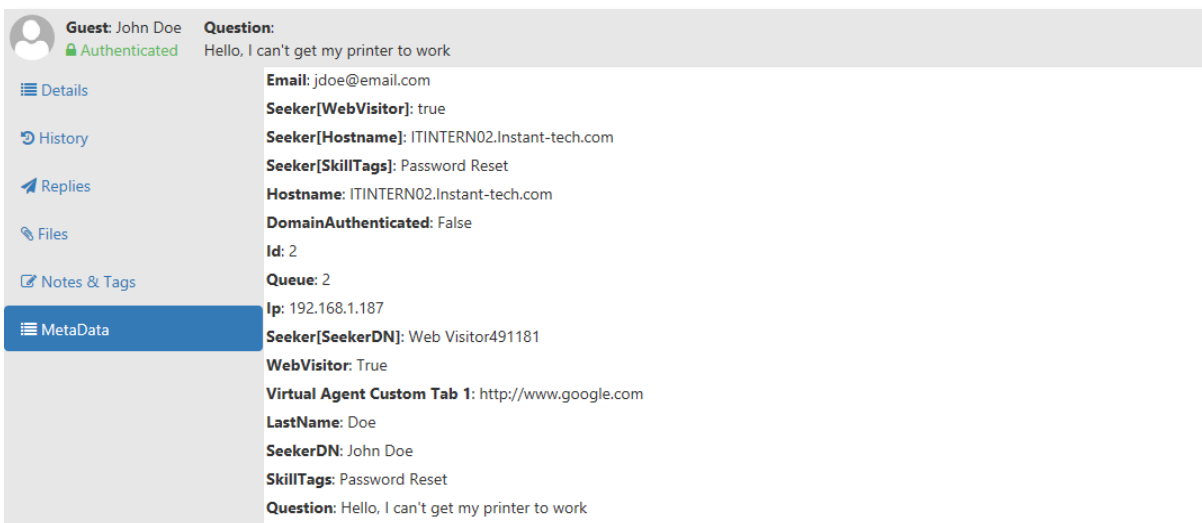Agents can receive multiple chats at once. The concurrent chat property is defined at an admin level, and the maximum number of concurrent chats an agent can have is ten. Once an agent's maximum concurrent chat number is reached, they will no longer receive any chats until they close out of one or more of their existing concurrent chats. For example, if an agent's concurrent chat setting is two, and they accept two chats, any additional chats will be routed to other agents who have not fulfilled their maximum concurrent or max per day number.

Transferring a Chat

Often times during a chat session, an Agent will need assistance to help a Guest. In these types of cases, the Agent will need to add another Agent from the queue to the chat. Chime uses integrated Lync/Skype for Business features to add and transfer chats to another Agent.

Figure 27: Add Agent to Chat in Skype for Business (Left image) or Lync 2010 (Right image)

To add another Agent to the chat:

1. Click on the **Invite More People** button on your Lync/Skype for Business client.
2. Use the search bar to find the Agent you would like to add to the chat.
3. Click **OK**.
4. Once you have added in the other agent, they will receive the chat history for the session and will be able to help the Guest.
5. At this point you can stay in the chat to finish the conversation or close the window and the session will continue with the session transferred over the Agent you added to the Chat.

Using Translate Features of the Agent Context Window

To start using the translation features, open up the system tray, **Right-click** on the Chime Agent Translate app icon and then select **View and translate conversations...**
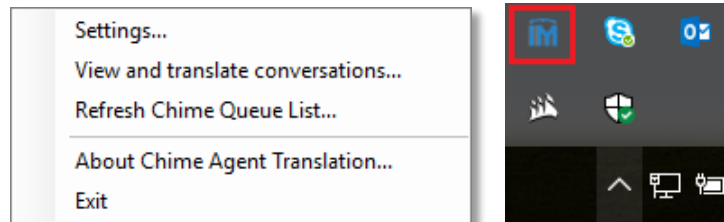

Figure 28: Agent Assist Tool

This will open up all active chat conversations that you have. (In this case it is blank because there are no chats opened). **Note:** this will display all chat sessions, not only ones from Chime.
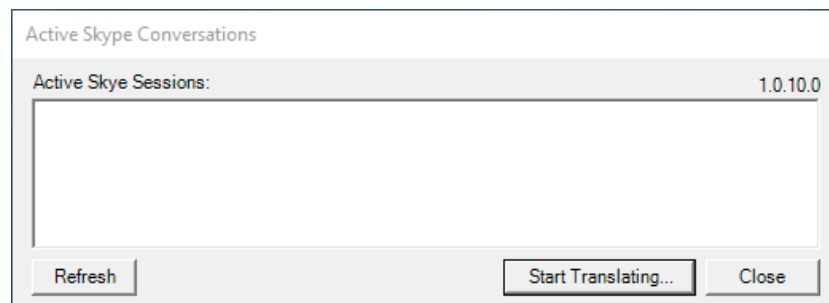

Figure 29: Active Skype Conversations

To better show the translation in action, the Guests perspective will be shown in addition to the Agents. The image below shows an example chat that could come into a queue primarily speaking Hungarian.

Figure 30: Web Client Form

If you receive a chat session while the Active Skype Conversations window is opened, simply press the refresh button, and all of the chat sessions will populate the window. To start translating chat conversations, either double-click on the chat you want to open, or select the chat you want to open up, and then click the **Start Translating** button.
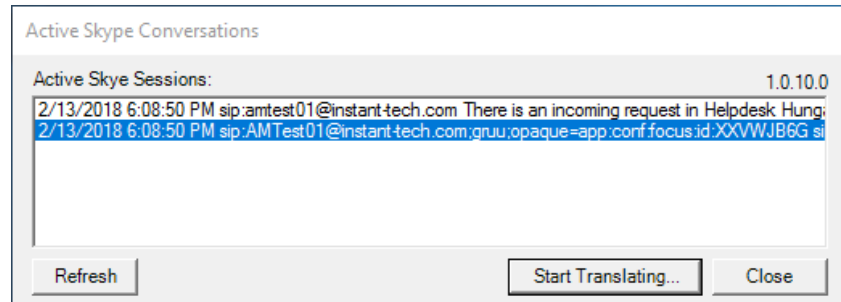

Figure 31: Populated Conversations Window

When the translator opens up, there will not be any messages translated until the Guest sends messages. Before using the translator, it is important to understand the different parts of it:
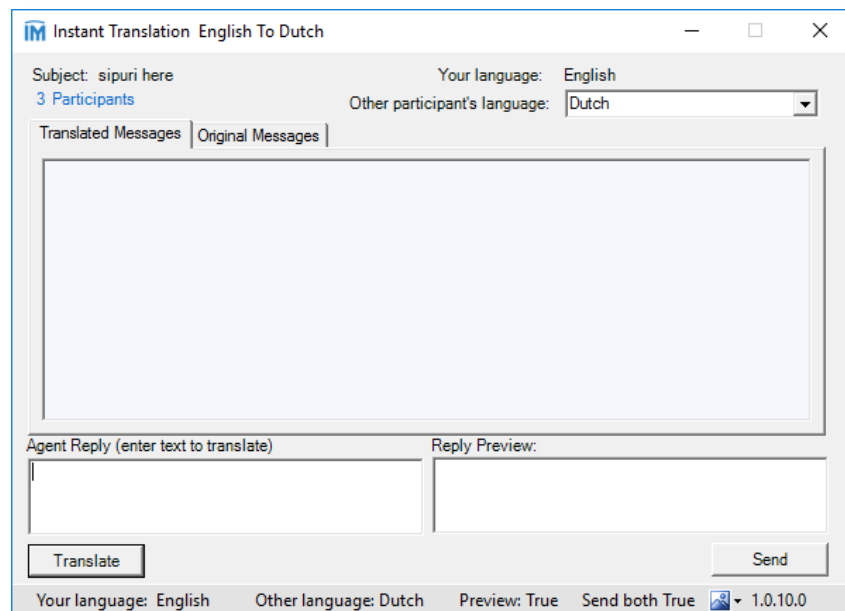

Figure 32: Initial View of the Translator

The top right of the tool is where the user can set the language that they are translating to and from. Your language is not configurable here, it is in the settings (this will be covered later) but the language of other user will be available to changed using the dropdown list.
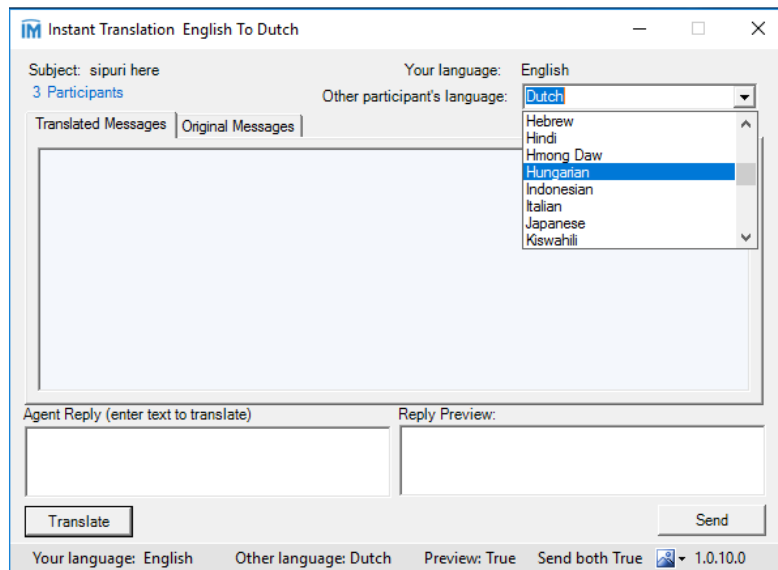

Figure 33: Changing the Guests Language

The two text boxes at the bottom of the application are where you will be translating. To use this simply set the language of the other participant, then enter in the text to be translated. Click the **Translate** button to display the reply preview. By default, the application will include both your original message and the translated message to send to the Guest (but you are able to modify this in settings). Click the Send button to deliver the message to the Guest.
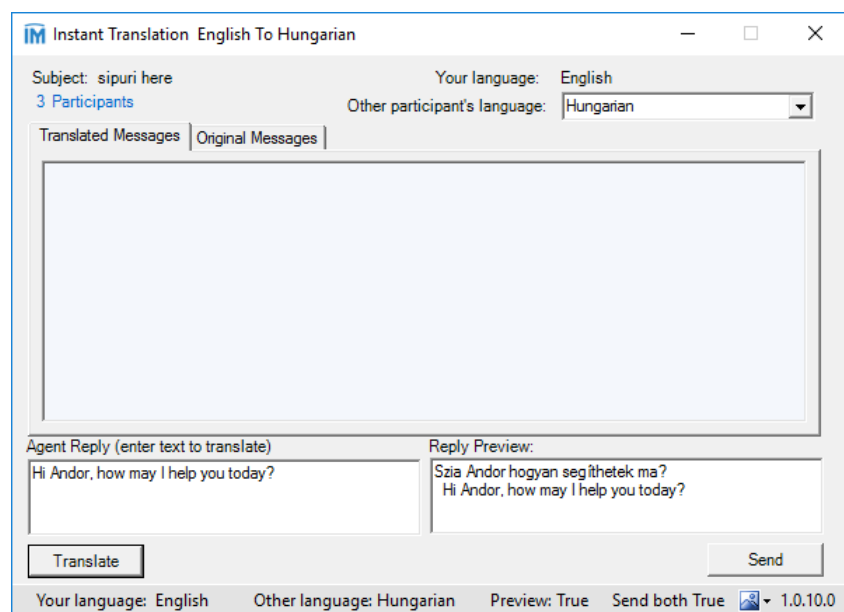

Figure 34: Looking at the Preview Before Sending

The images displayed below (Figure 30) show the Guest receiving the translated message that the Agent sent and then replying again (still in Hungarian). The agent will then receive the message in the translate tool, and it will automatically be translated for them.
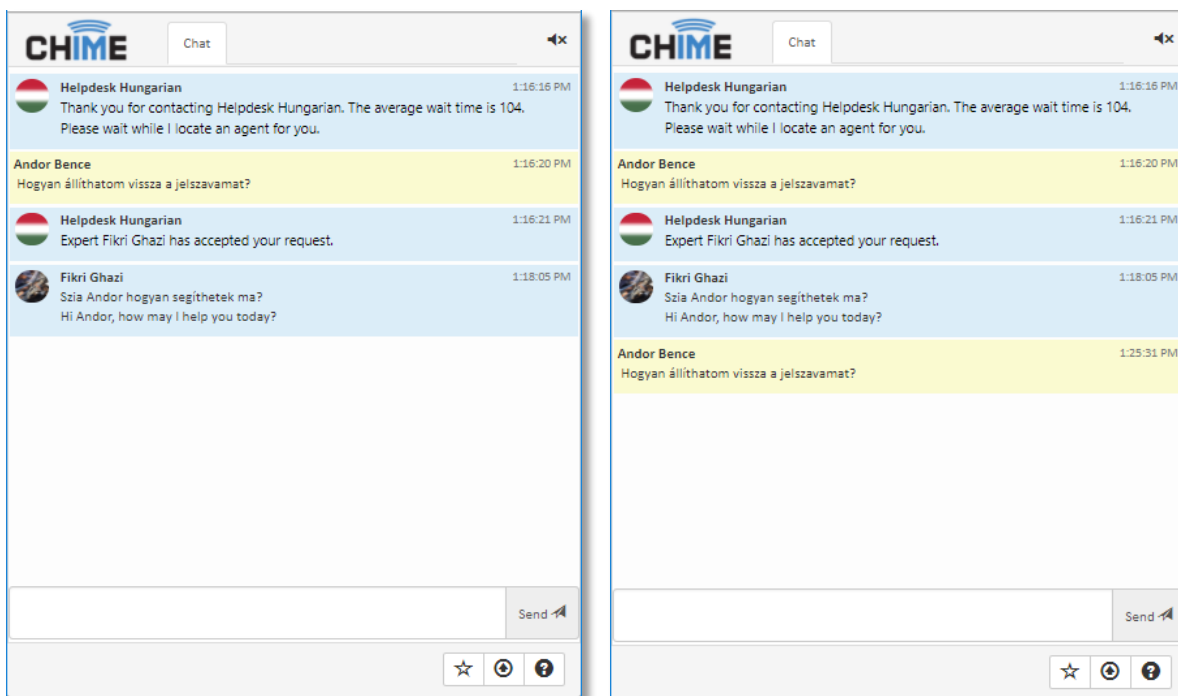

Figure 35: Translated Message and Reply

Below the languages are the Translated and Original messages. The tab that you select determines if you want to see the original messages from the Guest, or the mesasges along with the translated text. All of the messages that are sent from the Guest will appear in this window.

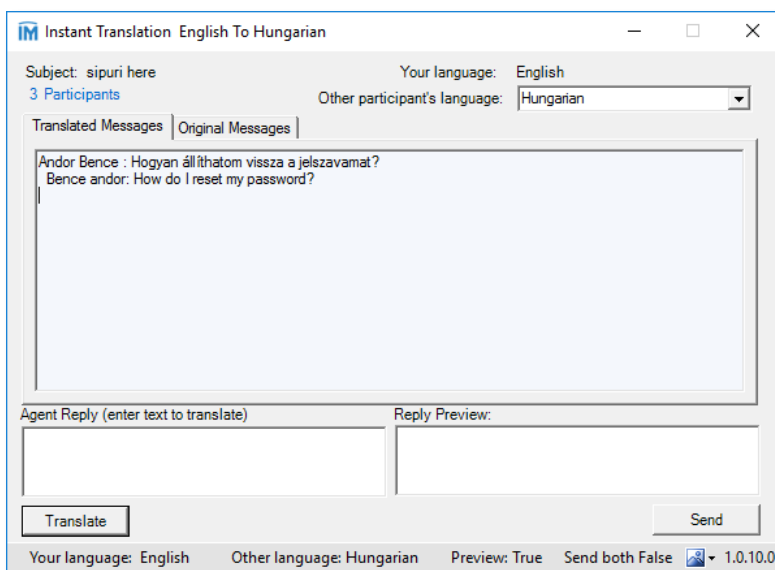
Figure 36: Translated Reply from the Guest

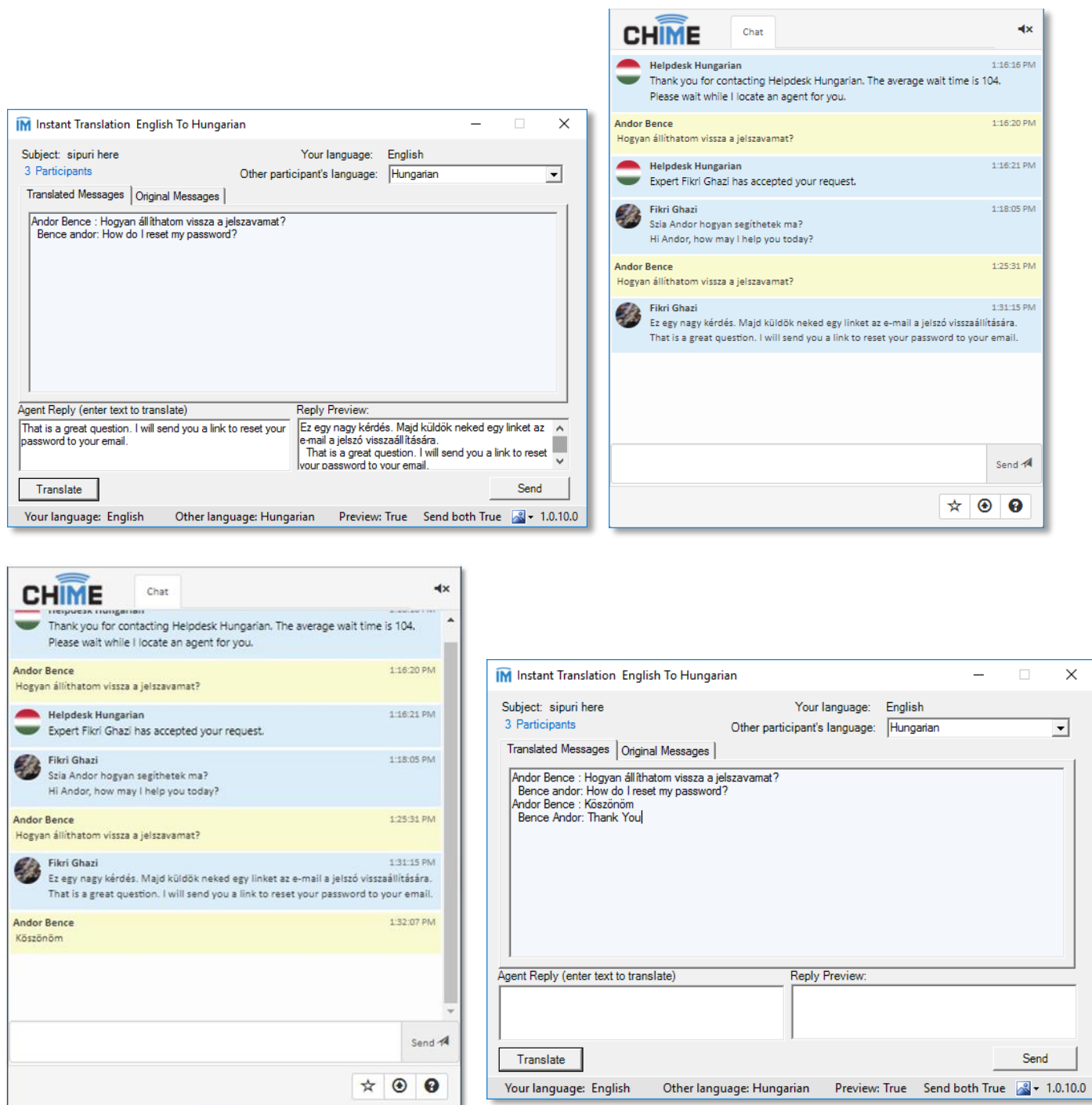Below is another set of replys between the Agent to the Guest.

Figure 37: Replies Between Agent and Guest

Accessing the Settings for Translate Feature

To modify any of the default settings of the Translate tool, simply click any part of the footer (The footer will have "Your language", "Other language", "Preview", and "Send Both" on it). Once it opens up, there will be three sections that can be modified:

The first section is the default language that the Agent will be using. By default it is set to English, but you can change it to any of the available languages. **Note**: the application will not auto-detect the language you are writing in, so you will need to modify this whenever switching languages.
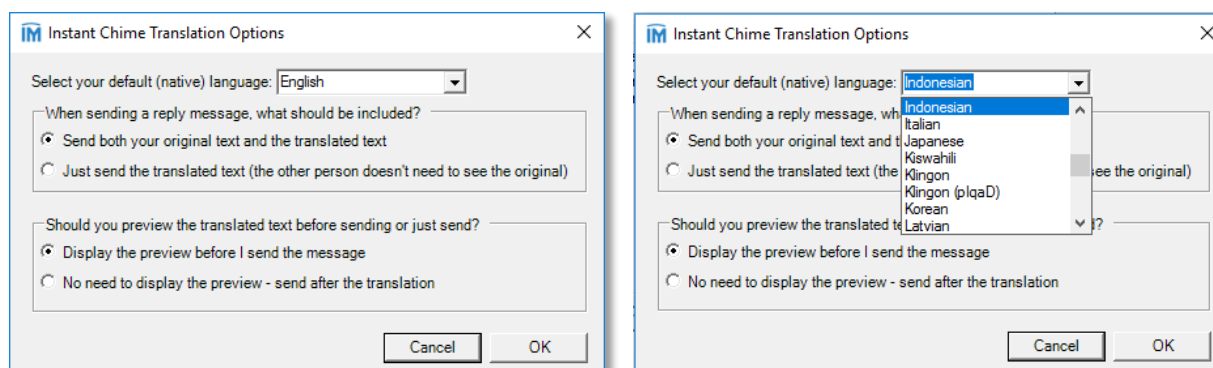

Figure 38: First Section Settings

The second section of the settings determines what the Agent is sending to the Guest. By default, it will be set to send both the original text as well as the translated text, but it can be modified to just send the translated text to the Guest.
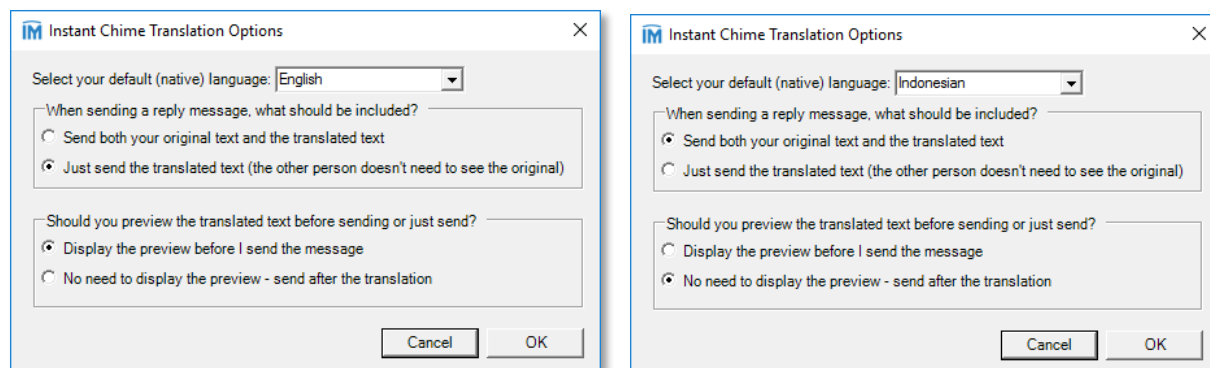

Figure 39: Second and Third Section Settings

The third and final section of the settings is for toggling on and off the translation preview. The translate tool will show the preview of the translated text by default, but if you do not want to see the preview, you can change the seting to not display the text.