



# Chime for Teams Agent Training User Guide

May 2020

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## CONTENTS

Introduction.....	4
How Does Chime Work? .....	4
Accessing the Chime Web Ui.....	4
Agent Dashboard .....	5
Accepting a Chat Request .....	5
Accepting Chats in Teams.....	6
Accepting Chats in the Chime Web UI .....	8
How to get to the Agent Context Window .....	10
Using the Agent Context Window .....	10
Details.....	10
History.....	11
Replies.....	11
Files .....	12
Notes .....	12
Meta Data .....	13
Concurrent Chats .....	13
Using the Agent Translation Feature .....	14
Enabling/Disabling yourself in Queues .....	15
Queue-Specific Dashboards .....	17
Active: .....	17
Monitoring Panel .....	17
Agents Online .....	18
View History .....	18

## 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.

## HOW DOES CHIME WORK?

Before you can start using Chime, it is good to know a little about how it is set up. The **Admins** and **Managers** are able to create **Queues** where users will come in looking for help. Queues are a collection of all the **Agents** who are able to assist with the **Guests** coming in looking for help. Queues can be split up into different languages, regions, or assistance types, so as an agent you might be assigned to multiple queues at once. Once you are assigned to a queue, you are able to accept chat conversations from guests looking for help. You will be prompted to pick up **Waiting** chats, and once you accept, you will be **Connected** with the user. Once you are connected, you can assist the guest. When you end the chat it will be moved into the **Completed** state.

## ACCESSING THE CHIME WEB UI

To perform many of the actions agents have available, you will need to log into the Chime server's Web UI. You will need to be provided a link to the Web UI by your managers, as it is different for all companies. The link may look something like this:

<https://chime.server.com.Chime>

Once you log in through the Microsoft Login page, you will be able to use the Chime Web UI. When you log in initially you will be on the Home page where you can see all the visible queues.

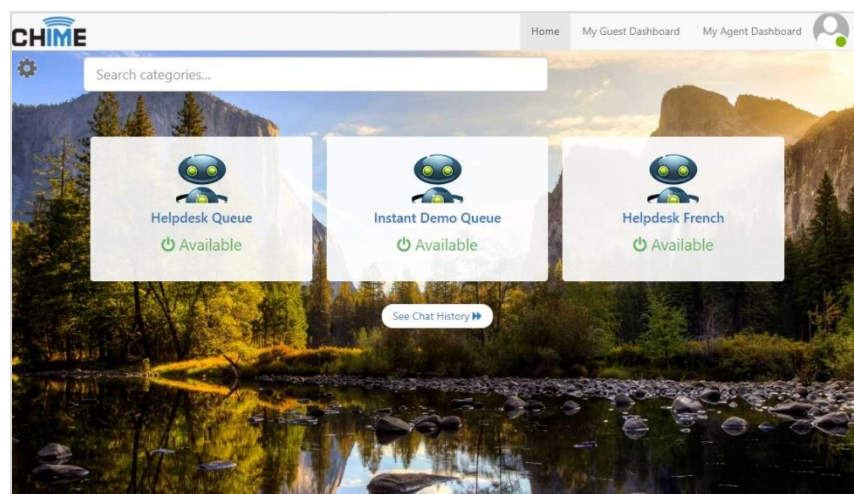


Figure 1: Chime Home

## AGENT DASHBOARD

The Agent Dashboard is a tool that gives agents a lot of information about the chats that they have taken and their statistics. On this dashboard you will be able to see any chat session that is routing, and you will also be able to accept any chat session that starts Waiting.

To get to the Agent Dashboard, click the **My Agent Dashboard** link in the header of the Chime Web UI.

The screenshot shows the Chime Agent Dashboard. At the top, there's a header with the Chime logo and navigation links: Home, My Guest Dashboard, and My Agent Dashboard (which is active). A user profile icon is on the right. Below the header, there's a 'Menu' button on the left. The main content area is divided into two sections. The first section, 'Active Chat Sessions', has a 'Refresh' button and displays a chat session for 'Guest: Patrick Madden' at 8:58:09 PM, with the question 'Hi I need some help with a password reset'. Below this, it says 'No Session Selected'. The second section, 'Monitoring Panel', contains a table with columns: Session Started, Queue, Guest, Question, State, Wait Time, Connected Time, Agent, and Pick Chat. The table has one row showing a session started on May 18, 2020 at 8:52 PM, in the Helpdesk Queue, by Jane Doe, with the question 'Hi I need some help with a password reset'. The state is 'Pre-chat Virtual Agent'. To the right of the table is a 'Pick Chat' button. At the bottom, there's a status bar showing 'Last updated May 18, 2020 9:21:07 PM. Next update in 8 seconds.' and a toggle for 'End session after closing agent web client' set to 'True'.

Session Started	Queue	Guest	Question	State	Wait Time	Connected Time	Agent	Pick Chat
May 18, 2020 8:52 PM	Helpdesk Queue	Jane Doe	Hi I need some help with a password reset	Pre-chat Virtual Agent				Pick Chat...

Figure 2: Agent Dashboard

When you first navigate to the Agent dashboard, you will see information about any of your **Active Chat Sessions** as well as a **Monitoring Panel** where you can track chat sessions that are **Waiting** or **Connected**. To get information about a specific queue you are in, simply click the **Menu** button on the left, then **View Dashboard** link for the queue you would like to see.

## ACCEPTING A CHAT REQUEST

As an agent who will be helping customers or guests in Chime, you will have two different ways of accepting chat conversations – either by using Microsoft Teams or the Chime Web UI. Below, we will cover both sections individually and will talk about the features supported by each.

## ACCEPTING CHATS IN TEAMS

As an agent using the Teams client, you will be added to the Team and channel for any of the queues that you are in. If you go the Teams section on the left side of the Teams client, you can navigate to the teams that you are in. Then go to the channel of the queue that you are in.

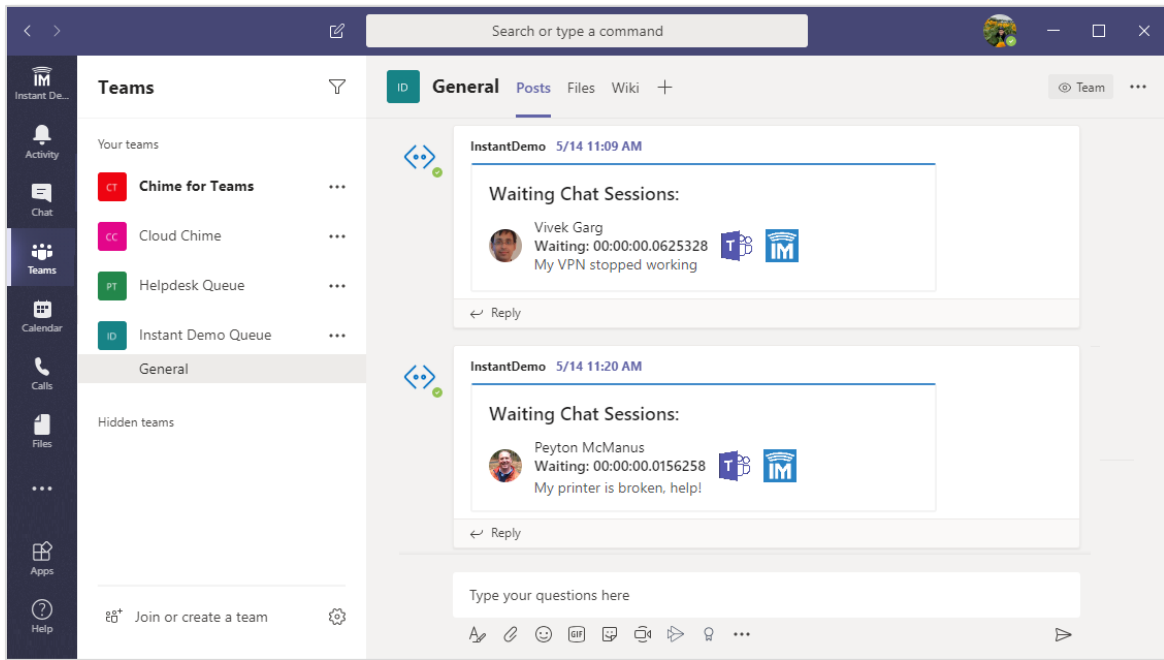


Figure 3: Teams Routing Channel

Once you are in the channel for the queue, you can wait until you see cards pop up with chats that are waiting.

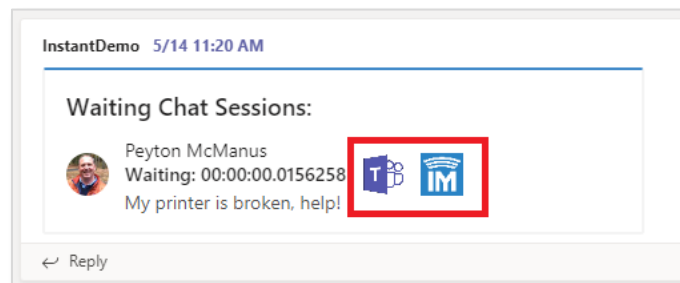
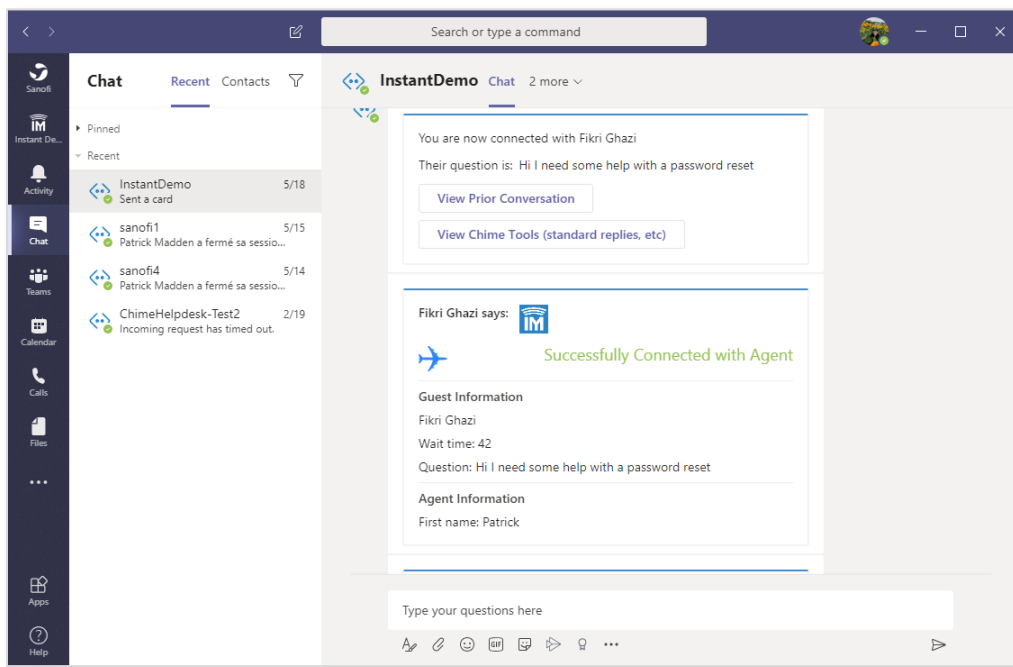


Figure 4: Accept a Chat Request

These cards will be sent out and you have the option to either accept it in the Teams client by clicking the Teams icon in the card, or by accepting in the Chime Web UI by clicking the icon with the IM logo on it.

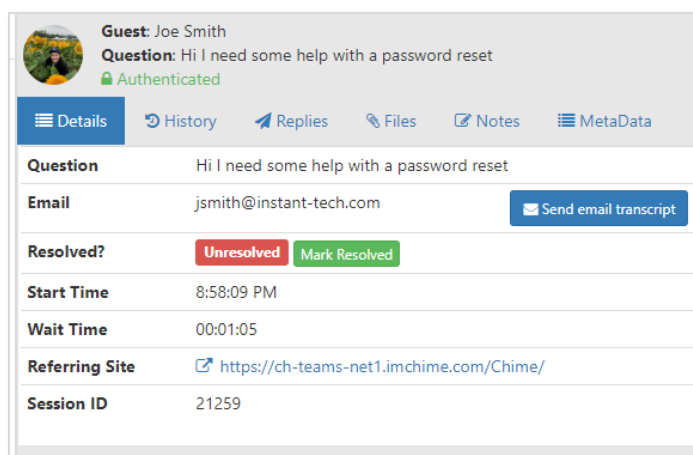
After you accept the chat session, you will receive a notification in the chat panel of your Teams client. Navigate to the new chat message and you can begin the chat session with the guest you just accepted.

Once you have opened the chat session from the guest, you will see a few messages that come through informing you that you are connected to user. You can see the question they came in with, view prior conversations, and use the **Chime Tools**.



**Figure 5: Chat accepted in Teams**

The Chime Tools are a set of helpful resources that we pull together to help agents service chats. By clicking the View Chime Tools button you will open up a page in the Chime Web UI that is the Agent Context Window. This gives you useful tools to assist the guest - like seeing past issues they came in with, sending standard replies, and file upload. This will be covered more in depth in the section: **Using the Agent Context Window**.



**Figure 6: Chime Context Window**

To end the chat session, either use the **End Chat** button that is attached to messages, or type in **/end** in the chat session.

## ACCEPTING CHATS IN THE CHIME WEB UI

Agents using the Chime Web UI to accept chats will want to monitor the Agent Dashboard to await new chat sessions. There is a monitoring panel on the Agent Dashboard that lets you see any incoming chat sessions and accept them once they move into the Waiting state.

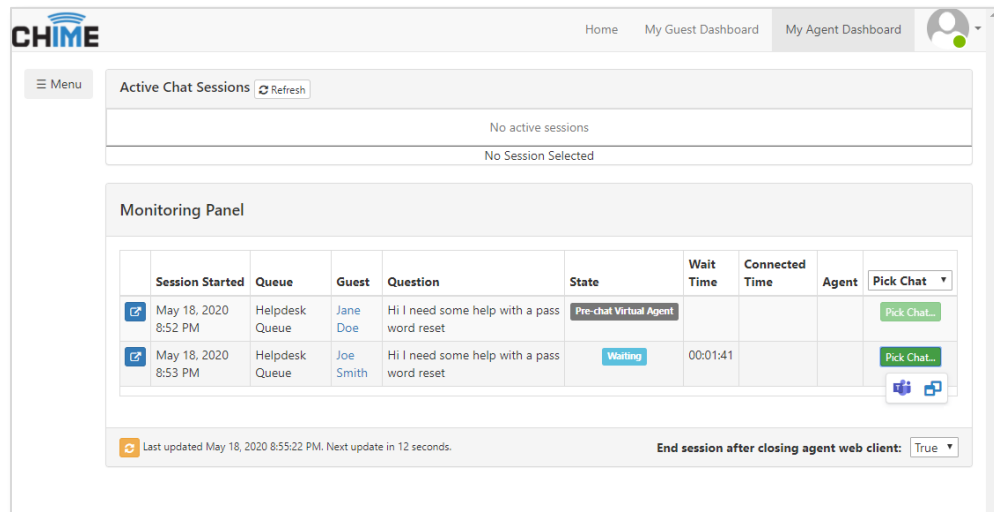


Figure 7: Pick Chat in Chime Web UI

As an agent waiting on the Agent Dashboard, there will be chats that might already be in the **Waiting** state. To accept these chats, click the **Pick Chat** button on the right side of the Monitoring Panel table for the chat session.

If a chat session routes to you, a notification will pop up on your screen showing the user coming in for help, as well as the wait time, their question and buttons to accept the chat session. You can choose to either accept the chat in the Teams Client (in that case you will need to open the chat conversation that is set up there) or you can accept the chat using the Web Client.

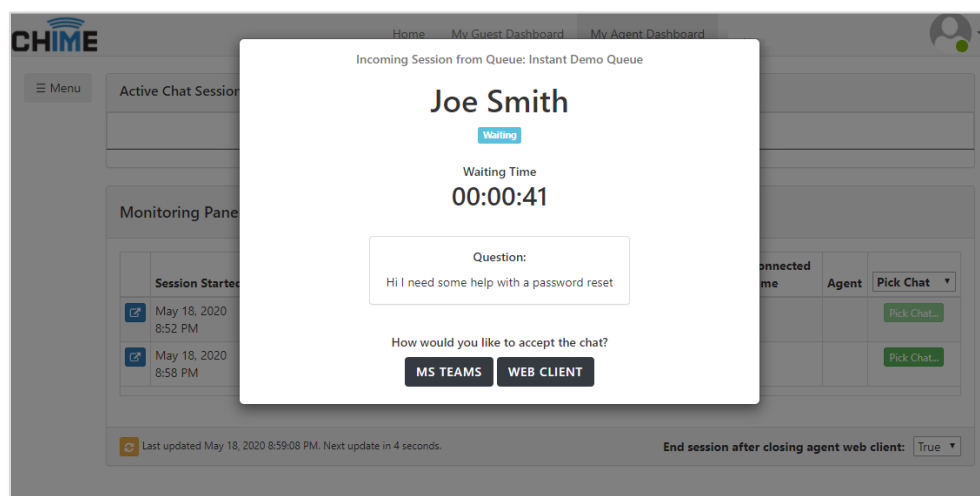


Figure 8: New Chat Notification



**Note:** When accepting the chat session through the web client you must make sure that you are also logged into your Teams client and have the same account logged into Chime and Teams. All chats opened in the Chime Web UI are also opened in Teams - and the accounts must match for this to work.

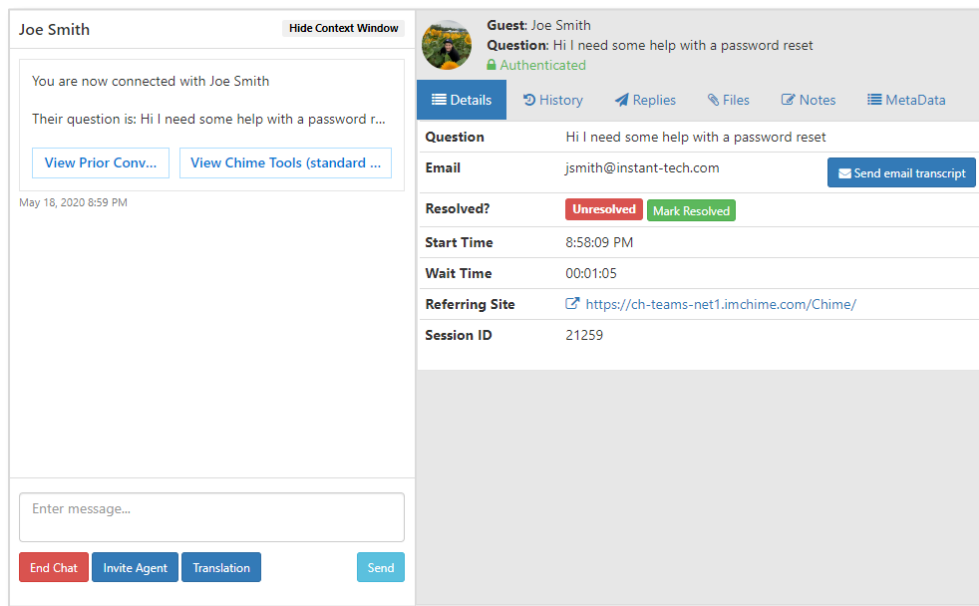


Figure 9: Open Chat in Agent Web Client

Once you have accepted the chat request in the Chime Web UI, a new window will open in your browser with an IM chat section on the left and the Agent Context Window to the right. You are now connected to the guest and can begin helping them.

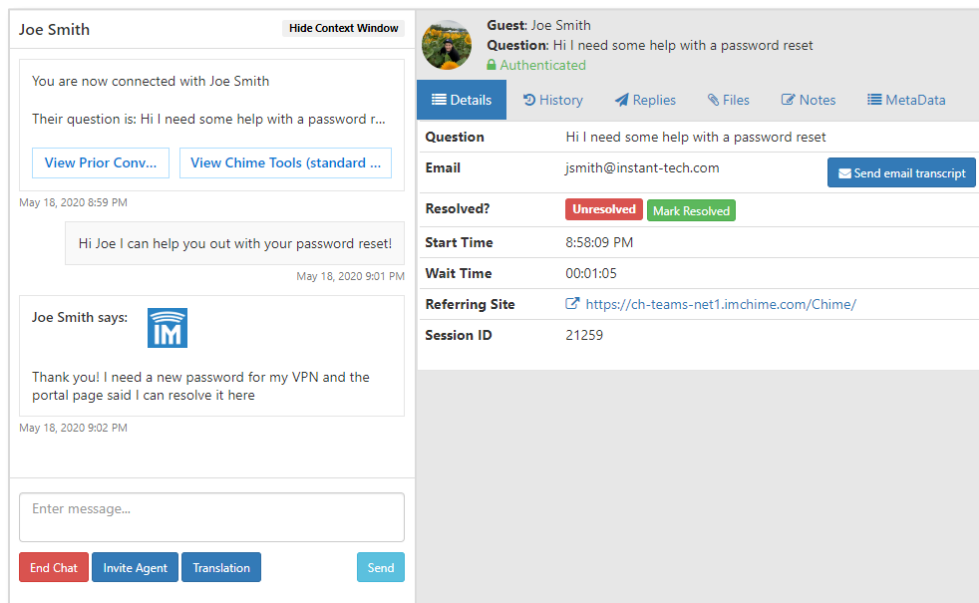


Figure 10: Conversation in Web UI

## HOW TO GET TO THE AGENT CONTEXT WINDOW

The **Agent Context Window** (ACW) can be navigated to in a variety of ways. One of the easiest is to navigate to your Agent Dashboard. If you are connected to a chat, the **Active Chat Sessions** panel will have an entry for the chat. Click on the active session, and it will open up the ACW for you to use.

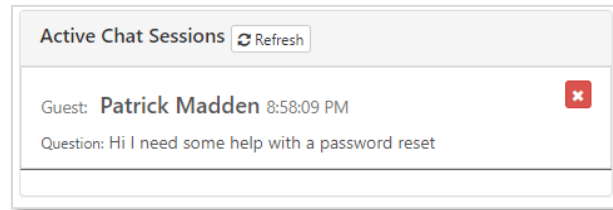


Figure 11: Agent Active Chat Sessions

The ACW can be accessed from the Teams UI right after accepting a chat session. If you click the **View Chime Tools** button, it will open up the ACW for the session you are connected to.

When using the Chime Web UI for a chat session, the ACW will be attached to the chat window. If you do not see it, simply click the **Show Context Window** button on the top right of the chat UI.

## 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.

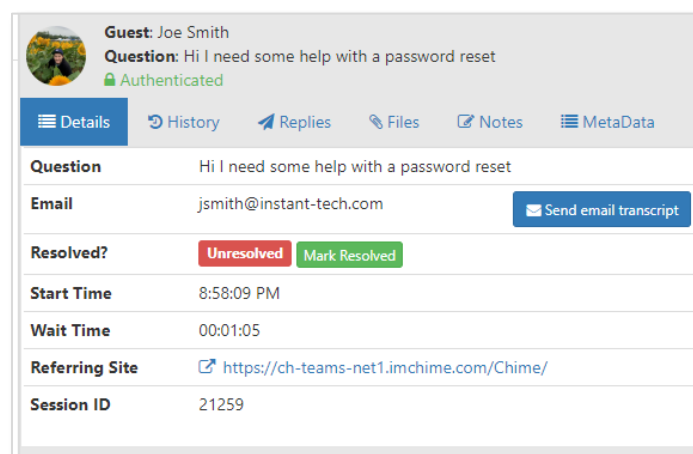


Figure 12: Details Panel

## HISTORY

The History tab shows the previous questions that the guest may have had. You will need to click the **Load History** button to see the history of the user, then click on the **View** button to view previous chats that the guest has had.

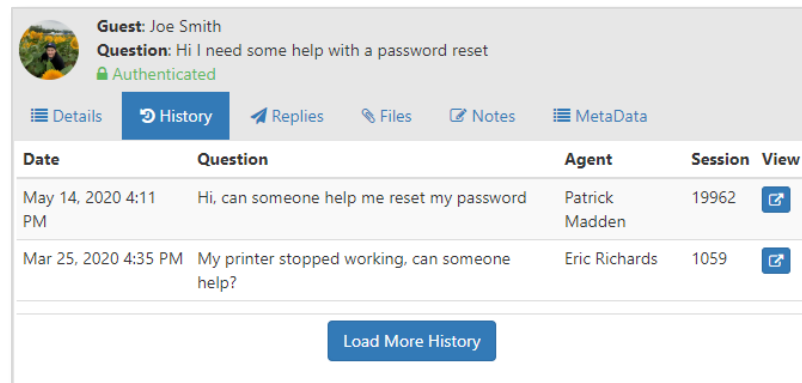


Figure 13: History Panel

## REPLIES

In the **Standard Replies** tab, agents have access to pre-made standard messages that have been added to the queue in which 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.

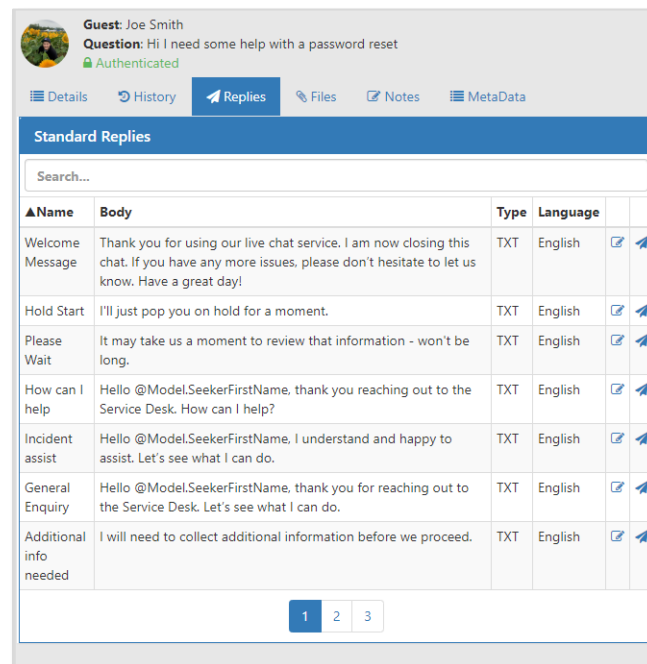


Figure 14: Standard Replies Panel

## 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 **Browse** button to search for the file you want to send, then click the **Upload** button to send the file to a guest. Click on the 'Refresh' button to reload the list of files, if any have been uploaded.

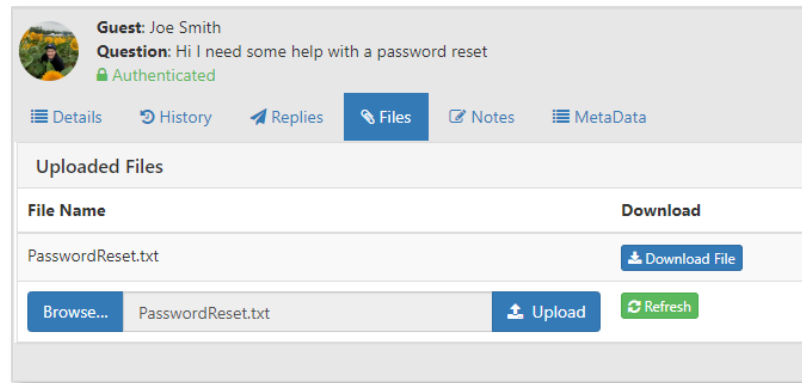


Figure 15: Files Panel

## NOTES

In the **Notes** section, agents can attach session tags to the session as well as add comments that will show up in chat history. If your team is using session tags, they are useful to categorize how the chat went. Some examples could be "Resolved issue" or "Added ticket" for example. To add a tag to the session, 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.

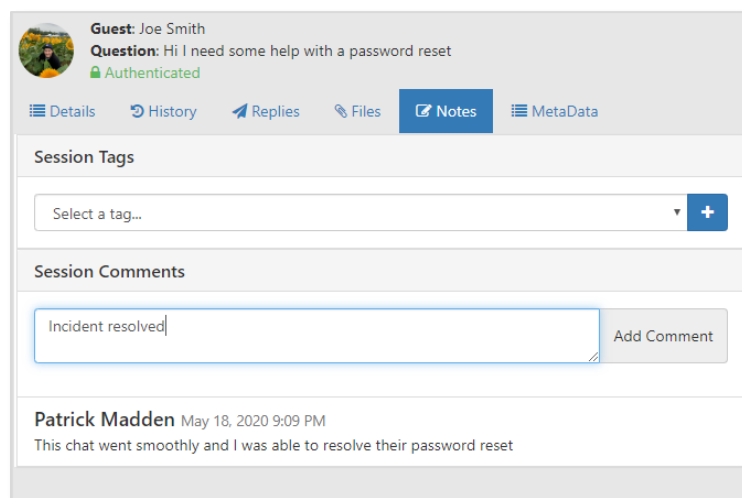


Figure 16: Notes Panel

**Add Comment** describes what actions you 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...*

## META DATA

The **MetaData** tab allows you to see additional information about the chat that might help such as the entry point, referrerURL, or any skill tags that might be on the session. This tab is generally only used in very specific scenarios where it is necessary and more useful for Managers and Reviewers to check after the chat session.

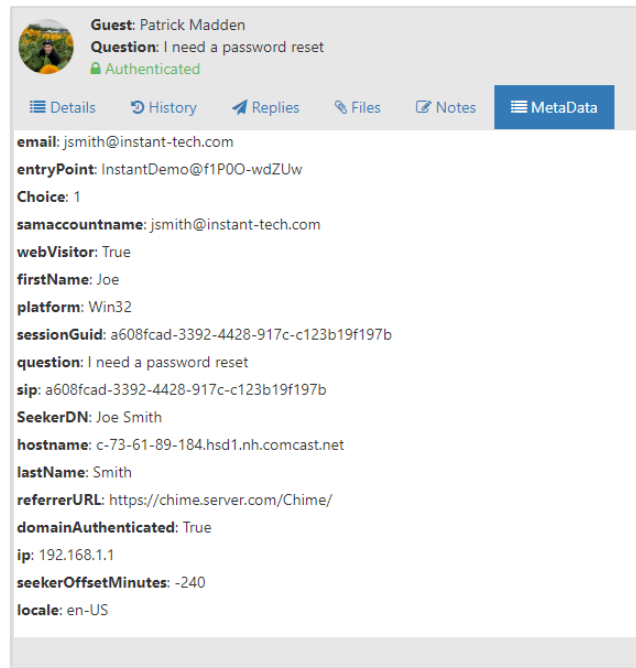


Figure 17: MetaData Panel

## 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.

## USING THE AGENT TRANSLATION FEATURE

If your service desk plans to support multiple languages, Chime allows you to do live translation in the chat session. Note: this live translation is currently only available on the Chime Web UI, so using the Teams client will not allow you to use this feature.

If a guest comes into your chat session and is speaking a language you are not familiar with, simply click the Translation button on the bottom of the Chat UI.

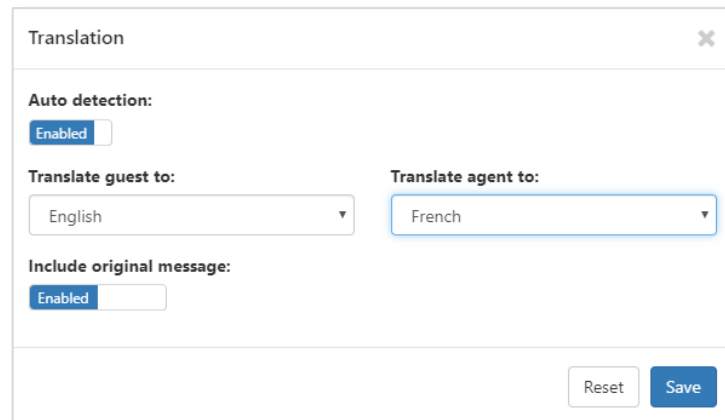
A dialog box titled "Translation" with a close button (X) in the top right corner. It contains three sections: "Auto detection:" with a toggle switch set to "Enabled"; "Translate guest to:" with a dropdown menu showing "English"; and "Translate agent to:" with a dropdown menu showing "French". Below these is the "Include original message:" section with a toggle switch set to "Enabled". At the bottom right are "Reset" and "Save" buttons.

Figure 18: Set Guest and Agent Languages

A window will open and allow you to choose what languages you want the guest to be translated to, and what language you want to be translated to. Set the **Translate guest to:** setting to your native language, and set the **Translate agent to:** setting to the language the guest speaks natively.

Click Save and you will be able to start sending messages to the user. Chime will automatically translate the messages and send them to the guest.

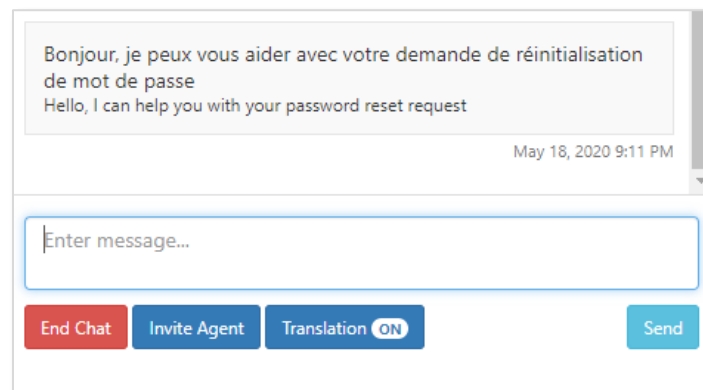
A chat interface window. The top part shows a message from the guest: "Bonjour, je peux vous aider avec votre demande de réinitialisation de mot de passe" followed by its English translation: "Hello, I can help you with your password reset request". The timestamp "May 18, 2020 9:11 PM" is on the right. Below the message is a text input field with the placeholder "Enter message...". At the bottom are four buttons: "End Chat" (red), "Invite Agent" (blue), "Translation ON" (blue with a white circle around the text), and "Send" (teal).

Figure 19: Guest Joins Chat Speaking French

**Note:** by default, Chime will send both the message you enter and the translated message to the guest. If you would like to only send the translated message to the guest, when you set up the translation settings, mark the field **Include original message:** to disabled.

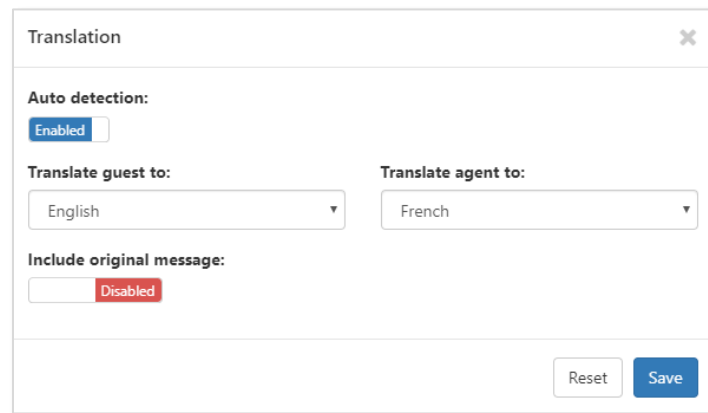
A screenshot of a 'Translation' settings window. It has a title bar with a close button. Inside, there's a section 'Auto detection:' with a toggle switch labeled 'Enabled'. Below that are two dropdown menus: 'Translate guest to:' set to 'English' and 'Translate agent to:' set to 'French'. At the bottom, there's a section 'Include original message:' with a toggle switch labeled 'Disabled'. At the very bottom right are 'Reset' and 'Save' buttons.

Figure 20: Disable Original Message

The image below shows what the messages will look like for the guest when the translation and original messages are included, and then when only the translated version is sent.

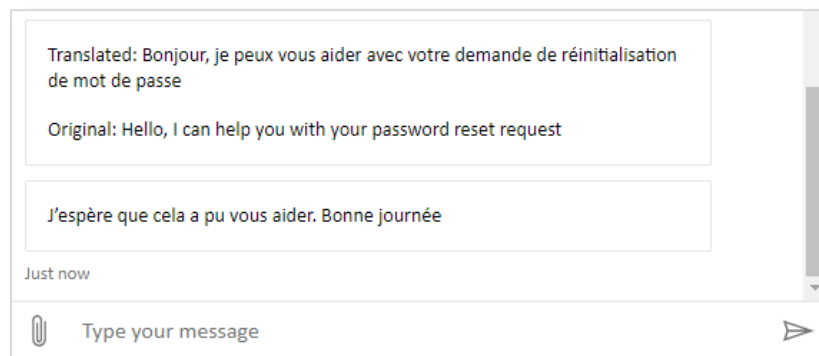
A screenshot of a chat interface. It shows two message bubbles. The first bubble contains two lines of text: 'Translated: Bonjour, je peux vous aider avec votre demande de réinitialisation de mot de passe' and 'Original: Hello, I can help you with your password reset request'. The second bubble contains the text 'J'espère que cela a pu vous aider. Bonne journée'. Below the messages is a timestamp 'Just now' and a text input field with a paperclip icon on the left and a send button on the right.

Figure 21: Translated Messages Sent

If you would like to remove translation at some point during the chat session, click on the **Translation** button, then click **Reset** in the translation settings window.

## ENABLING/DISABLING YOURSELF IN QUEUES

Some queues will allow Agents to set their Chime status on the Queue Dashboard. In the image below, you can see that the Helpdesk Queue has a **My Status** option underneath the **View Dashboard** link and the Instant Demo 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**. This feature is mainly used if you are going on break or need to be away from your desk for an extended period of time.

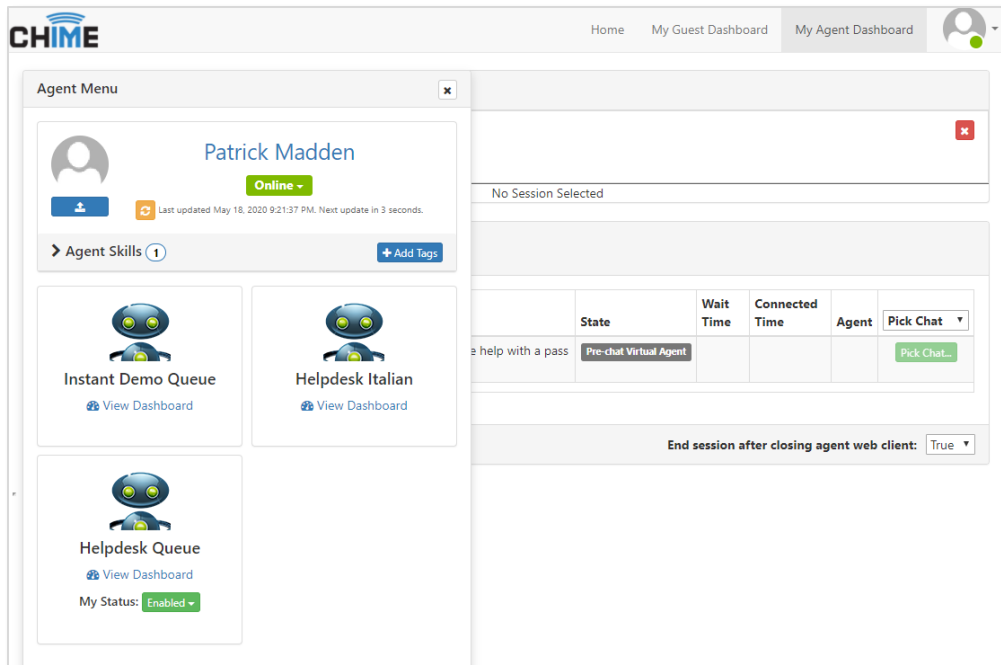


Figure 22: Enable/Disable Status

To set your Enabled/Disabled status, first click the **Menu** button on the left side of the Agent Dashboard. Next, select the Status you want to change in the dropdown picker.

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.



## QUEUE-SPECIFIC DASHBOARDS

If you want more info on the chats you have with a specific queue, you can use the dashboard for a specific queue. To do this, click the **Menu** button on the left side of the Agent Dashboard, then click **View Dashboard** for the queue that you want the additional information. On the **Dashboard**, you will see five tabs: **Active**, **Monitoring Panel**, **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.

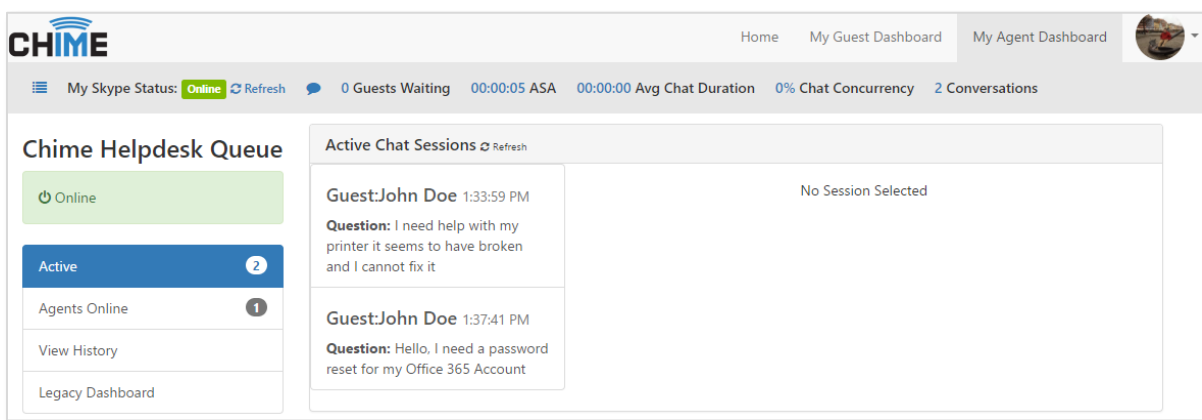


Figure 23: Active Sessions

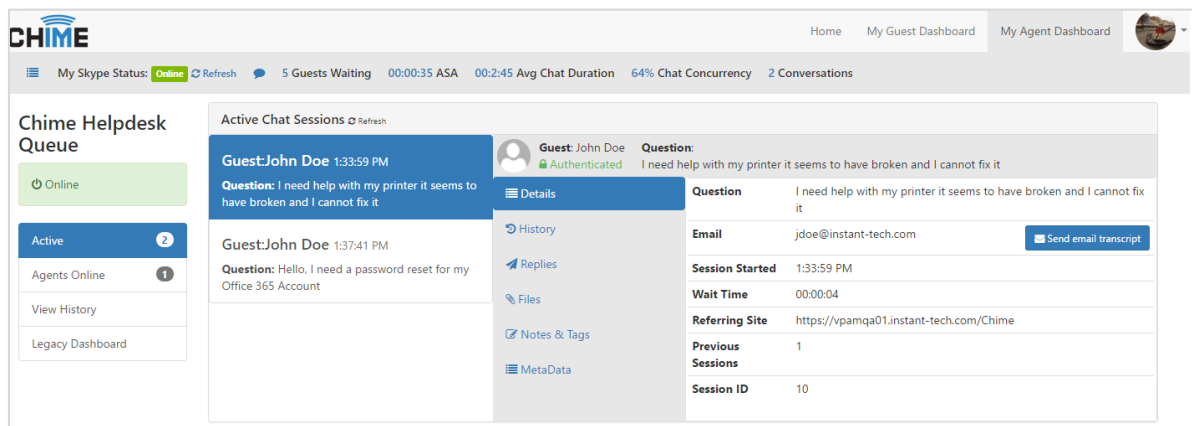


Figure 24: Active Sessions Drilldown

### MONITORING PANEL

The monitoring panel is very similar to the one on the Agent Dashboard, however, this one only shows chat sessions from the queue that you are currently in instead of chat sessions from all the queues you are in.

## 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.

CHIME

Home My Guest Dashboard My Agent Dashboard

My Skype Status: **Online** Refresh 0 Guests Waiting 00:00:05 ASA 00:15:45 Avg Chat Duration 0% Chat Concurrency 2 Conversations

Chime Helpdesk Queue

Online

Active 0

Agents Online 1

View History

Legacy Dashboard

View Your Online Colleagues

Enter a name...

Patrick Madden  
Available  
Currently helping 0 guests

Justin Moore  
Unavailable  
Currently helping 0 guests

Lamia Mukanovic  
Unavailable  
Currently helping 0 guests

Figure 25: 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 in this area. To look through the details of a chat, simply click the View Details button on the row the chat is on.

CHIME

Home My Guest Dashboard My Agent Dashboard Admin

My Skype Status: **Online** Refresh 0 Guests Waiting 00:00:05 ASA 00:15:45 Avg Chat Duration 0% Chat Concurrency 2 Conversations

Chime Helpdesk Queue

Online

Active 0

Agents Online 1

View History

Legacy Dashboard

Review History

Select a Date Range

From: June 18, 2017 To: June 21, 2017 Refresh

Chat History Presence History Charts

Search Chat Results

Search

Guest	Question	Date / Time	Is Resolved?	View Details
Jane doe	Hello, I need a password reset for my Office 365 Account	Jun 21, 2017 1:37 PM	Resolved	<a href="#">View Details</a>
John Doe	I need help with my printer it seems to have broken and I cannot fix it	Jun 21, 2017 1:33 PM	Unresolved	<a href="#">View Details</a>

Figure 26: Chat History