



Collaboration Server 5.0 Multi-session Agent

1 Access the Agent Desktop

To access the Agent Log In page for the multi-session agent desktop, go to the URL:
http://_____

To log in

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- Step 1** Enter the requested information.
 - Step 2** Click **Log in**.
 - Step 3** Accept any certificates that display.
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2 Review Agent Desktop

Examine each area of the agent desktop:

- The Agent Information area, at the top of the desktop, contains your name and icons for layout, options, help, and the secure socket layer.
- The Meetings area contains active and waiting requests.
- The Customer Info area contains caller information.
- The Script Viewer area contains content developed by your administrator that you can share with callers. This content may include Web pages, Web page comparisons, chat messages, files, and PowerPoint presentations.
- The Chat area allows you to chat online with callers.
- By default, you view shared information in another browser window.

3 Connect Callers

Your system administrator determines whether you connect requests automatically or manually. Automatic connect is the default setting.

To connect automatically



Click the **Ready** icon so that a green light appears. Requests automatically enter your Active list. They continue to do so until you have reached the maximum number of sessions determined by your System Administrator.

To connect manually



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- Step 1** Open a Queue and select a caller.
 - Step 2** Click the **Connect** icon. You are now in session with that caller and the caller appears in your Active list.
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4 Chat with Callers



Chat with callers to offer assistance.

To chat with callers

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- Step 1** Type your chat in the **Reply To** section of the Chat area.



Note If you are configured to use Spell Check, you can right-click on underlined words to select the correct spelling.

- Step 2** Press **Enter** or click the **Send Reply** icon to send the message.
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Your message and the caller's replies appear in the **Chat Text** section of the window.

You can also send scripted chat messages from the Script Viewer area.



5 Share Information

The Script Viewer area displays scripts that match certain skills. These scripts contain information chosen by your administrator, such as Web pages, Web page comparisons, files, PowerPoint presentations, chat messages, and speaker notes.

To share scripted content from the Script Viewer area, the Script Share feature must be enabled.

Enable or disable the feature by clicking the **Script Share** icon.

Table 1 Script Share Icon States

Script Share Icon	Indicates
	Script Share is enabled.
	Script Share is disabled.

You can preview browser content, share script content, and share non-scripted Web pages.

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Previewing Browser Content

You can preview both script content and regular Web pages.

To preview script content



Step 1 If Script Share is enabled, click the **Script Share** icon to disable the feature.

Step 2 Select the content that you want to share. The content appears in your shared view browser but is not sent to the caller.

To preview Web pages

In your shared view browser, navigate to the page that you want to preview. The page is not shared with the caller.

Sharing using Script Share



You use Script Share to share script content.

To share content using Script Share

Step 1 Enable the Script Share feature by clicking the **Script Share** icon.

Step 2 Select the content that you want to share. The content appears in your shared view browser and in the caller's browser. If you select a chat message, the message appears in the Chat area.

Sharing Using Share Page



Use Share Page to share Web pages that do not appear in the Script Viewer area.

To share Web pages using Share Page

Step 1 Navigate to the Web page in your shared view browser.

Step 2 Click the **Share Page** icon to send the page to the caller. The page appears in the caller's browser.

6 Switch Sessions

You can switch between the sessions in your Active list.

If a caller sends you a text chat message while you are engaged in a different session, a light appears next to the caller's name in the Active list. The light changes from green to yellow to red over time and may blink. The light remains on until you have actually responded to the caller by either sending information or a chat message.

To switch sessions

Click on the caller that you want to answer. The agent desktop changes to reflect your current session.

7 Disconnect a Caller



When you have finished a session with a caller, disconnect the caller using the Disconnect icon.

To disconnect a caller

Step 1 Click the caller's name in the Active list.

Step 2 Click the **Disconnect** icon.

8 Log Out



When you want to exit Collaboration Server, log out using the **Logout** icon.

To log out

Step 1 Make sure you are **Not Ready**.

Step 2 Click the **Logout** icon.

Step 3 Close your browser if you are not immediately logging back in.
