



## Collaboration Server 5.0 Single-session Agent

# 1 Access the Agent Desktop

To access the Agent Log In screen for the single-session agent desktop, go to the URL:  
http://\_\_\_\_\_

To log in

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

# 2 Review the Agent Desktop

Take a moment to review the agent desktop. Select each of the four tabs to familiarize yourself with their functions. Review the Script Viewer area and Shared View.

To review your preference settings

- Step 1** Open the **User** tab.
- Step 2** Click **Preferences** on the User tab.
- Step 3** Review the default preferences and change them if necessary.
- Step 4** Click **OK** or **Cancel** to close the window.

To access help



Click the **Help** icon. This icon appears on each tab and in the Script Viewer area.

# 3 Connect Callers

Requests originate as one of the following:

- a MeetMe request to an agent's MeetMe ID
- a Chat request to a skill group
- a Blended Collaboration or Blended Chat request to a skill group

You are configured to connect these requests either manually or automatically. If you are unsure about the manner in which you connect callers, consult your system administrator.

# 4 View Caller Information

You can view information about the caller both before and after you connect the caller.



**Note** You can check caller information before you connect a caller only if you are configured to manually connect callers.

To view caller information

- Step 1** Open either the Queue tab or In Session tab.
- Step 2** Select the caller.
- Step 3** Click **Caller Info**. The Caller Information screen opens.

# 5 Share Content

You can share content with callers using both the Script Viewer or the Sharing tab.

## Script Viewer

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.

Follow the script links to share content with your participants. Your shared view and your participants' browsers display the shared content.

## Sharing Tab

The following features are located on the Sharing tab and allow you to share information with callers.



**Note** Leadership must be assigned to you or all participants before you can use these features.

## Leadership

The session leader controls the information shared in the session. Assign leadership by clicking the **Leadership** icon. You can assign leadership to a specific agent or to all participants involved in the session.

**Table 1 Leadership Icon States**

Leadership Icon	Indicates
	All participants are leaders.
	A specific agent is the leader.

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## Follow Me

Follow Me allows participants to browse Web sites together. Click the **Follow Me** icon to enable or disable the feature.

**Table 2** Follow Me Icon States

Follow Me Icon	Indicates
	Follow Me is enabled.
	Follow Me is disabled.

To browse with Follow Me

- Step 1** Click the **Follow Me** icon to enable the feature.
- Step 2** Browse the Web pages in your shared view browser. The participants' browsers follow.

## Page Share



Use Page Share to share an individual Web page that you are viewing with all participants.

To use Page Share

- Step 1** Navigate to the page you want to share.
- Step 2** Click the **Page Share** icon. All participants' browsers are updated with the new content.

## White Board



Use White board to create white board images interactively with participants.

To use the White Board

- Step 1** Click the **White Board** icon to open the White Board window.
- Step 2** Use the features to draw with callers.
- Step 3** Close the White Board when you are finished.

## History List



History displays a list of all Web pages shared during the session.

To share Web pages from the History List

- Step 1** Click the **History** icon to open the History List.
- Step 2** Select the Web page that you want to share.
- Step 3** Click **Send**.

## Address Field



Send Web pages from the Address Field.

To share pages using the Address Field

- Step 1** Type a Web page address in the Address Field

**Step 2** Click **Send**.

## Chat

You can use the Chat feature to engage in an online conversation with participants.

To use Chat:

- Step 1** Click the **Chat** icon to open the Chat window.
- Step 2** Type your message in the Chat window.
- Step 3** Select the recipients of the message.
- Step 4** Click **Send** to share the message.

## Application Share



Application Share allows you to share both applications and images of applications with participants.

To use Application Share

- Step 1** Open the application that you want to share.
- Step 2** Select the application from the App Share pull-down menu on the Sharing tab.
- Step 3** Either:
  - Click **Send** to send continuous images of the application to the participants.
  - Press **CTRL+F12** on your keyboard to share a single image of the application.
  - Check the **Share** option and click **Send** to allow participants to use the application with you.
- Step 4** Click **Stop** to end Application Sharing.



**Note**

If you are sharing using CTRL+F12, you do not need to click **Stop**; Application Share only occurs when you press CTRL+F12

## 6 Disconnect a Caller



Disconnect a caller when you have finished helping the caller.

To disconnect a caller

- Step 1** Open the **In Session** tab.
- Step 2** Select the caller you want to disconnect.
- Step 3** Click **Drop Caller**.

You are now ready to begin another session or log out of Collaboration.

## 7 Log Out

You must log out when you want to stop using Collaboration Server. If you close your browser without logging out, you may need help from your system administrator to log in again.

To log out

- Step 1** Open the **User** tab.
- Step 2** Click **Log Out**.
- Step 3** Close your browser.