



Instant Technologies  
Instant Agent Framework  
Queue Manager  
Agent Documentation

## **Copyright and Disclaimer**

This document, as well as the software described in it, is furnished under license of the Instant Technologies Software Evaluation Agreement and may be used or copied only in accordance with the terms of such license. The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Instant Technologies. Instant Technologies assumes no responsibility or liability for any errors or inaccuracies that may appear in this document. All information in this document is confidential and proprietary.

Except as permitted by the Software Evaluation Agreement, no part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Instant Technologies .

Copyright © 2006 Instant Technologies, All rights reserved.

## **Trademarks**

All other trademarks are the property of their respective owners.

## **Contact Information**

See our Web site for Customer Support information.

<http://www.instant-tech.com/>

## Table of Contents

<b>Welcome to Instant Agent Framework Queue Manager.....</b>	<b>4</b>
How Do I Get Started? .....	4
<b>Being Available .....</b>	<b>5</b>
<b>Handling an incoming query.....</b>	<b>5</b>
<b>In-Chat Agent Options .....</b>	<b>6</b>
<b>Agent Options .....</b>	<b>8</b>
1. Available Agents .....	8
2. Participating Agents.....	8
3. Queue Statistics.....	9
4. Removing yourself from the queue .....	9
5. Changing your phone number.....	9
6. Getting assistance from other operators.....	9
14. Resetting your Agent Status .....	9
<b>Administrative Agent Options .....</b>	<b>10</b>
7. View list of ongoing chat conversations .....	10
8. Modify Welcome message .....	10
9. Temporarily disable routing of customer requests.....	10
10. See list of waiting customers .....	10
11. Enable/Disable operators.....	10
12. View average customer wait time .....	10
13. Refresh the agent list.....	10
<b>Closing an Active Chat Session .....</b>	<b>11</b>

## Welcome to Instant Agent Framework Queue Manager

Instant Agent Framework (IAF) Queue is designed to create instant messaging queues that combine the power of Lotus Sametime (IBM Instant Messaging) with existing teams in your organization. IAF Queue enables the development and deployment of customized IM Queues to help with sales and support, customer service applications, and internal IM queues.

As a primary design goal, the development of these IM queues takes place using a visual development environment that should not require any complex end user programming.

If you have ideas or suggestions on improvements to the Instant Agent Framework Queue Manager, then please send your ideas and suggestions to: [info@instant-tech.com](mailto:info@instant-tech.com)

### **How Do I Get Started?**

Queue Manager is accessed through your regular Sametime Connect client, whether that is Sametime Connect, Lotus Notes IM, Sametime Links or Instant TeamMessenger. As an end user providing assistance to others through Queue Manager the only step required to provide help is to log on to your Sametime client and be in an “available” state. Queue Manager does offer other options when taking part in a conversation which will be discussed in this documentation:

Being Available

Handling an incoming query

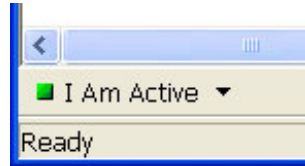
Agent Options

Starting a meeting

Starting a Premiere Conferencing Phone Call

## Being Available

To provide support through Queue Manager you must be logged into Lotus Sametime with your status as active. You are active when your status indicator is a green square as can be seen here:



If your status is not set to "I Am Active" you can change it by selecting Options, I am Active. When you enter the Agent Options Menu (AOM), by messaging the QueueBot, you will be presented a list of options. Option 2 will show you your availability. For example:

Bill Bolts/US/Instant YES (Enable, Online, Free, Chats 0 of 1)

Each agent will either be designated YES (available to accept a customer chat) or NO (not available). Following that designation will be a list of four reasons why that agent is available or not.

Enable/Disable – This is whether or not the agent is enabled or disabled in the queue. This is determined by you the agent by using Option 4 in the AOM.

Offline/Online/Away/DND – This refers to an agent's Sametime status.

Busy/Free – This will display Busy if an agent is in a chat with a customer (and has reached the maximum amount of chats the agent can handle at once), or if the agent is in the Agent Options Menu (and is only set to handle one chat at once).

Chats 0 of 1 – This will display two numbers, the first is how many chats with customers the agent is currently in. The second number is how many concurrent chat requests the agent is setup to handle.

## Handling an incoming query

When a query is submitted by a user to Queue Manager, Queue Manager routes the incoming question to the next available agent, as an agent you will receive a message along the lines of:

"There is a customer request in the Instant Queue Manager agent from Peter Packer. Press y to accept the request."

If you are in a position to take the question, you should press "y" and then hit Send or press enter. If you type "n" or close the window, Queue Manager will attempt to find another agent to provide support.

If you accept the incoming query, you are now in a conversation with the customer and can start discussing their question.

When the customer has finished the conversation and has closed their Instant Messaging window, you may be presented with additional prompts, such as if you wish to log the conversation or if the query was handled, these options are configured by the Queue Administrator.

## In-Chat Agent Options

The agent has a number of options while in a chat with a customer. These options are issued by the agent by sending a command during the chat. For example, if the agent wanted to end the chat they would type `"/end"` (no quotes). Here are some other commands:

**/end** – This command will end the chat with the customer. Using this command is a way to end the chat and add log information to the chat log. This is opposed to the agent just closing the chat window which would not allow the agent that opportunity.

**/meeting** - At any time you can upgrade a chat session with the customer requesting help to an Instant Meeting.

An Instant meeting contains following tools:

1. Audio (To Communicate using computer audio)
2. Video (To communicate using computer audio and video)
3. Share (To present information using the whiteboard or screen sharing)

When the `"/meeting"` command is used an invitation is sent to the customer requesting help; the customer can then either join the meeting, or close the invitation dialog box.

**/nway** – This command will start an nway chat with the customer. Caution though, as this will expose the name of the agent to the customer and vice versa. A better approach to pulling other agents into the chat is the `/invite` command.

**/call <customer phone number>** - If Premiere Conferencing support has been configured by the Queue Administrator, at anytime during your conversation with the customer, you can use the Queue command `"/Call"` to initiate a Premiere Conference Call with the customer.

To place a Conferencing call send the text `"/Call <user phone number>"` where `<user phone number>` is the customer to be contacted phone number. When the command `"/Call <user phone number>"` is issued a telephone conference will be started between the agent and the customer on the Premiere Conferencing server.

Note: Queue participant can place a telephone conference call only if you have enabled the support for Premiere Conferencing.

**/transfer** – This command will give the agent a list of all the QueueBots that are running in the same IAF ServiceManager as the current QueueBot is running in. This is configured by the Queue Administrator. The agent can then select another QueueBot to transfer the customer too. The customer is then entered into that new Queue and the agent is free to accept new requests.

**/invite** – This command will give the agent a list of all the agents in the current Queue. The agent can then select to send a request to one of those agents to enter the current chat. If the other agent is available, then a request is sent to them asking for their assistance. If the agent accepts the invitation then they will join under the name Agent1 (unless the Queue is configured to display the agents names to the customers)

Either agent can leave the chat at this point and let the other one take over. Any of the invited agents may enter information for the chat log at anytime by typing /log. That way, the invited agent can add information to the log and then leave.

There is no limit to the number of agents you can invite.

**/help** – This will display a list of the commands available to the agent.

**/log** – This is a special command and is only available after the chat has ended. Agents issuing this command will be prompted to enter additional information about the chat and whether the request is Open or Closed. These prompts are configured by the Queue Administrator.

**/url <web url>** - This option is only available when the customer messages the QueueBot from a web portal using the Instant STLinks package (Ask your administrator if this is how your system is setup). Invoking the /url command with the Instant STLinks package will open the url in a new frame in the customers chat window. However, using this command without the Instant STLinks package will cause no issues; in this case the command will display the url to the customer through the chat box.

## Agent Options

Additional options are available to agents by double clicking on the Queue within the Sametime Buddylist, when you double click you will see:

You are a member of this queue. Your current status is : enabled

1. To see a list of enabled and available agents
2. To see a list of all agents participating in the queue
3. To see statistics for this queue
4. To enable/disable yourself for this queue
5. To add/modify your phone number
6. To contact other operators in queue

### 1. Available Agents

Selecting the option “1. To see a list of enabled and available agents” will display a list of agents that are available and enabled for the queue, so agents that are logged on and enabled for the queue.

### 2. Participating Agents

Selecting the option “2. To see a list of all agents participating in the queue” will display a list of agents that are setup to provide assistance for the queue. Each agent will either be designated YES (available to accept a customer chat) or NO (not available). Following that designation will be a list of four reasons why that agent is available or not. For example:

Bill Bolts/US/Instant YES (Enable, Online, Free, Chats 0 of 1)

Each agent will either be designated YES (available to accept a customer chat) or NO (not available). Following that designation will be a list of four reasons why that agent is available or not.

Enable/Disable – This is whether or not the agent is enabled or disabled in the queue. This is determined by you the agent by using Option 4 in the AOM.

Offline/Online/Away/DND – This refers to an agent’s Sametime status.

Busy/Free – This will display Busy if an agent is in a chat with a customer (and has reached the maximum amount of chats the agent can handle at once), or if the agent is in the Agent Options Menu (and is only set to handle one chat at once).

Chats 0 of 1 – This will display two numbers, the first is how many chats with customers the agent is currently in. The second number is how many concurrent chat requests the agent is setup to handle.

### **3. Queue Statistics**

Selecting the option “3. To see statistics for this queue” will display a list of statistics for the queue, such as:

- Total number of inbound requests
- Number of agents available in the queue
- Number of agents registered for the queue
- Number of accepted chats

### **4. Removing yourself from the queue**

Selecting the option “4. To enable/disable yourself for this queue” will switch you back and forth from Available and Unavailable. There may be times during the day when you want to continue receiving Instant Messages from other Sametime users, but do not wish to participate in the Queue. Using this option will allow you to remain available to other Sametime users, and remove you from the Queue.

### **5. Changing your phone number**

Selecting the option “5. To add/modify your phone number” allows you to change your phone number. This option is only relevant if you are using the Premiere Conferencing Bridge to enable telephone calls to be initiated during the conversation. If for example you should change your desk during the day and your telephone number changes, you can use this option to change the setting stored within Queue Manager for your name.

### **6. Getting assistance from other operators**

Selecting the option “6. To contact other operators in queue” allows you to get assistance from a fellow operator. Queue Manager will locate an operator to assist you in the same fashion in which it locates an operator for an incoming customer request.

## **14. Resetting your Agent Status**

Selecting the option “7. Reset your agent status” is a fail safe option. This is only to be used if you, the agent, thinks that your status is incorrect (you can check your status by using option 2 in Agent Options Menu (AOM)).

The two status’ this option will correct is Busy/Free and the Number of chats you can handle, Chats X of Y. Choosing this option will set you to Free and set you to Chats 0 of Y. Remember though, if you are only set up to handle one chat at once, and you are in AOM, you will be set as Busy (so if you do Option 2, you will appear busy). Then when you close the AOM you are set to Free.

Do not use this option if you are currently in a chat. If you do, it will not break anything, but QueueBot will then think you have no chats open, so you might be given more chats than you were set to handle.

## **Administrative Agent Options**

Apart from above-mentioned options there are some additional options that are available only to those Queue participants that have been marked as administrators. These options are as follows:

### **7. View list of ongoing chat conversations**

Selecting the option "7. To see a list of ongoing chats." allows administrators to see a list of active chat conversations going on between operators and customers.

### **8. Modify Welcome message**

Selecting the option "8. To specify custom welcome message for queue for temporary maintenance." allows administrators to modify the Welcome message with which the customers are greeted when they first establish a connection with the Queue Manager.

### **9. Temporarily disable routing of customer requests**

Selecting the option "9. To temporarily enable or disable the routing of requests for this queue." will allow you to temporarily prevent any incoming requests to be passed on to operators while Queue Manager is being configured or is under maintenance.

### **10. See list of waiting customers**

Selecting option "10. To see list of waiting customers in queue" will display a list of customers whose request is currently being passed around to the agents.

### **11. Enable/Disable operators**

Selecting Option "11. To enable/disable operators" will give the administrator a current list of agents in the Queue. The administrator can then choose to enable or disable the agent.

### **12. View average customer wait time**

Selecting option "12. To view average customer wait time" will display a time value which is the average amount of time that all customers for that QueueBot instance have waited.

### **13. Refresh the agent list**

Selecting option "13. Refresh the agent list" will take a few seconds to re-resolve all groups and agents. This will effectively update the groups to reflect any changes made to them. Note, there is also an option when setting up the QueueBot to have the agent list automatically updated every hour.

## **Closing an Active Chat Session**

A Queue participant can at any time close their active chat session with the customer requesting help from their chat session.

To terminate the chat session Queue participant needs to send “/end” text from his chat window. If Queue participant issues “/end” command the chat session between the Queue participant and customer requesting help is closed and Queue participant is presented with the logging prompts if logging is enabled by the Queue Administrator.