Live Expert Studio User Guide

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Note: A PDF version of this guide is available for `download`.


ONE

STUDIO USER GUIDE

The purpose of this document is to review how to use the Live Expert Studio and its many features.

1.1 Getting Started

Before you continue with this guide, the Live Expert Studio should already be installed, and you should have received a username and password.
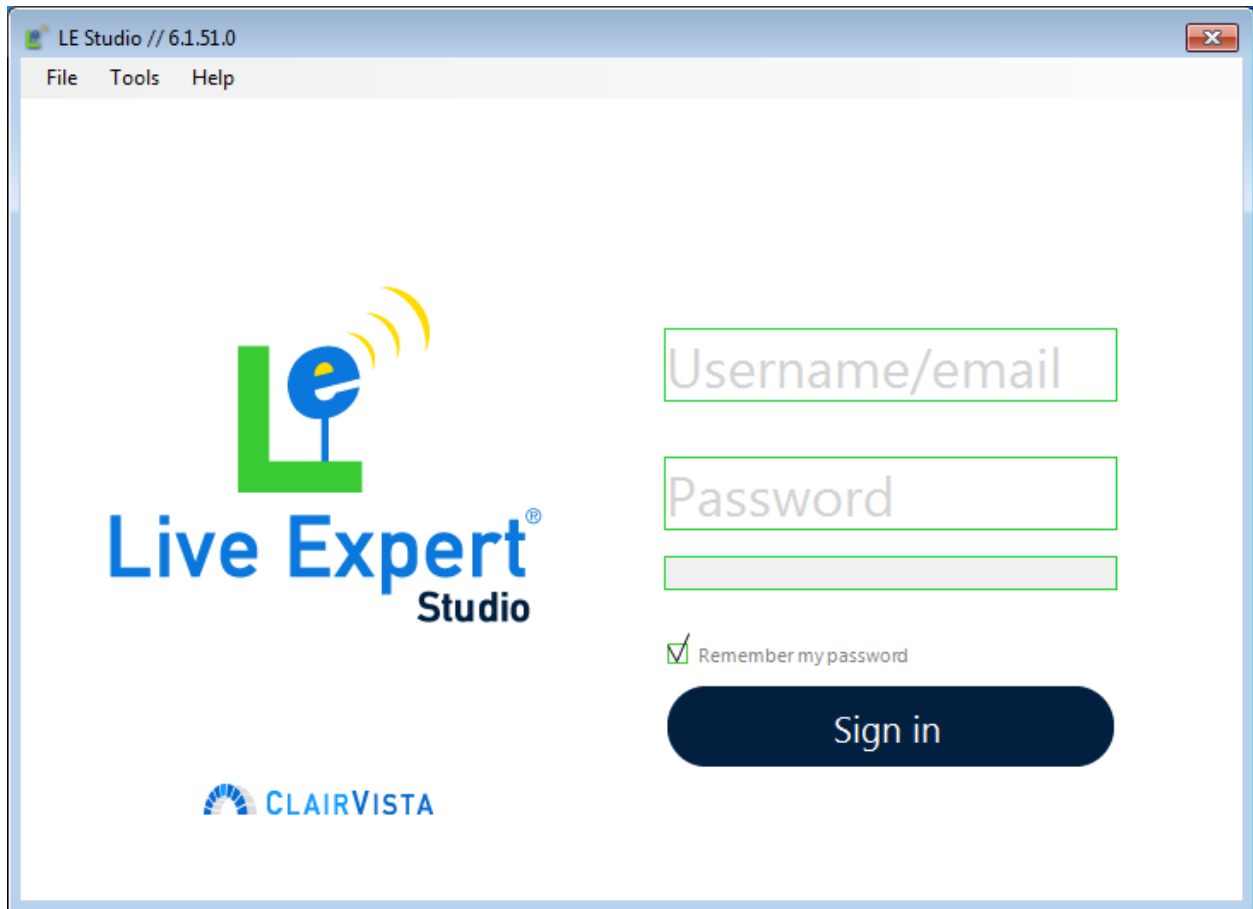
1.1.1 Starting the Live Expert Studio

To launch the Studio, simply double-click the shortcut located on the Windows Desktop, Start Menu, or Taskbar.
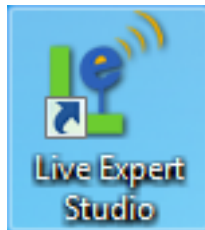
1.1.2 Signing In

To sign in, simply enter your Username and Password, then click the Sign in button. Selecting "Remember my password", saves your Username and Password for subsequent sign ins to the Studio.

1.2 Overview

The Studio is organized into the following sections.

Table 1.1: Studio Sections

#	Label	Description
1	Menu Bar	File, Tools, and Help context menus
2	Status Icons	Informative status and availability icons
3	Video	Live video stream
4	Information Call	attribute details and statistics
5	Call Controls	Customizing, transferring, and ending calls
6	Content Tabs	Browsers and call specific content
7	Content Controls	Print and share tab content

1.3 Menu Bar

1.3.1 File

Contains two options, Exit, to exit the Studio application and, Logout, to log the current user out of the system.

1.3.2 Tools

Content Sharing

Share File

Select a file on the agent's PC to share on the customer's content panel. Standard web formats are allowed: GIF, JPEG, PNG and PDF. A window will provide visual progress of the file transfer.

Select & Share

Select a rectangle area of the agent's PC desktop or screen and the selection is shown on the content sharing display panel of the Expert Station. The Select Desktop & Share to Station option on the Tools menu provides instructions for its use.

Press F1 and select the area of the desktop to share. The area can be the window or screen of another application.

In the above example, MS Paint is open with a series of Live Expert logos. Selecting the rectangle as presented will present the image in the Studio's content thumbnail view and on the content sharing panel of the LE Anywhere user interface.

Station Call - Screen Sharing

Station Screen Sharing

Initiates desktop sharing and control of the Live Expert Station.

Audio/Video

Audio/Video Setup

Video calls conducted between the LE Studio and LE anywhere customers utilize Adobe Flash as the video component. The Flash settings must be configured. Selecting Flash Setup will open a Flash Setup dialog which contains a solid black flash object. Right-click in the black area to open the menu screen, then select settings.

This menu also includes microphone device and volume configuration, and camera device configuration for calls from a Live Expert Station.

Anywhere Call - Screen Sharing

Studio Full Screen Sharing

Initiates agent desktop sharing. This method will share the entire agent desktop with the customer. It can be configured such that both parties can share mouse and keyboard control, or just the agent can have control, while their actions are displayed in real-time for the customer.

Studio Tab Sharing

Initiates agent desktop sharing. This method will share information from the active tab on the LE Studio with the customer. It can be configured such that both parties can share mouse and keyboard control, or just the agent can have control, while their actions are displayed in real-time for the customer.

Window Options

Undock Current Tab

Undocks your current tab from the Studio.

Dock All Tabs

Returns all undocked tabs to the Studio.

Undock Video Window

Undocks the customer's video stream from the Studio.

Content Retrieval

Get File From Client

Request the LE Anywhere user upload a file to the agent. A file chooser will appear for the customer who can select the file from their computer to upload to the agent.

Dashboards

Current Call Queue

Provides a view of the current agent status summary, call queue and important daily statistics. It refreshes on a short interval basis to provide real-time information.

Manager Dashboard

Launches the Manager Dashboard in the Live Expert Enterprise.

Settings

Presents a window that contains the current settings for the LE Studio in read-only mode.

Reconnect to Last Station

Initiates a call invitation to reconnect to the last Station you were connected with.

1.3.3 Help

About

Provides application details and version stamp.

Logs

Opens a folder where application logs are stored.

1.4 Agent Name Display

Your name, as it will be visible to others, is displayed beneath the menu bar. When you first sign in, the Status Indicator will show that you are Idle and you will not receive any Call Invitations until setting yourself to be Available.
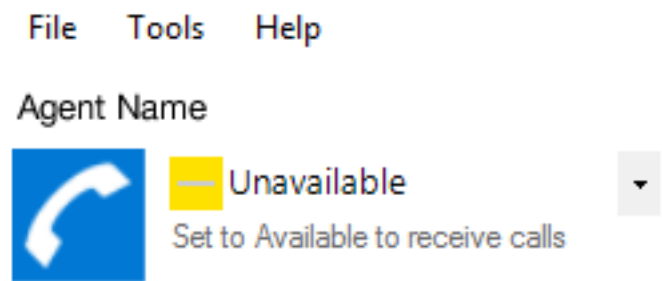

1.5 Status Indicator

Below the Agent Name Display is a blue icon that communicates the current status of the Studio Workflow.

Table 1.2: Status Indicator Icons

Icon	Status	Description
	Idle	While you are available you may see this icon, indicating that you are currently inactive.
	In Call	The In Call status is automatically set by the system when an agent accepts a video call invitation. The In Call status is in effect until the call is ended
	After Call Work	After a call is completed, you have an opportunity to enter a call type and notes. Once you save call notes you will becoming available again.

1.6 Availability Flag

The Availability Flag is displayed next to the Status Indicator in the Studio control panel.
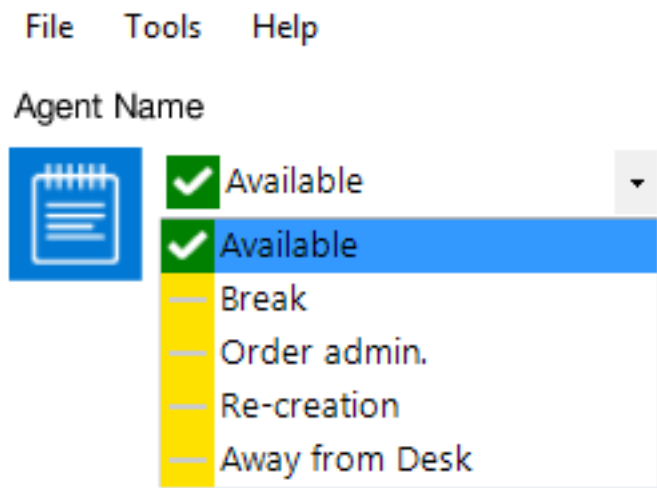
You may find that you also have custom Unavailable Statuses to better identify utilization by different types of activity, as shown above.

Table 1.3: Availability Flag Icons

| Icon	Sta- tus	Description
	Un- avail- able	Unavailable experts never receive a call invitation. The default status when logged in, this is set when you refuse a call invitation or do not respond within the allotted time.
	Avail- able	The Available status means that the agent is ready to accept video call requests from customers. The agent should set this status after logging in.

1.7 Queue Indicator

The Video Call Controls pane includes an indicator when there are customers waiting in the call queue. The Queue Indicator is located below the Status Indicator and Availability Flag.
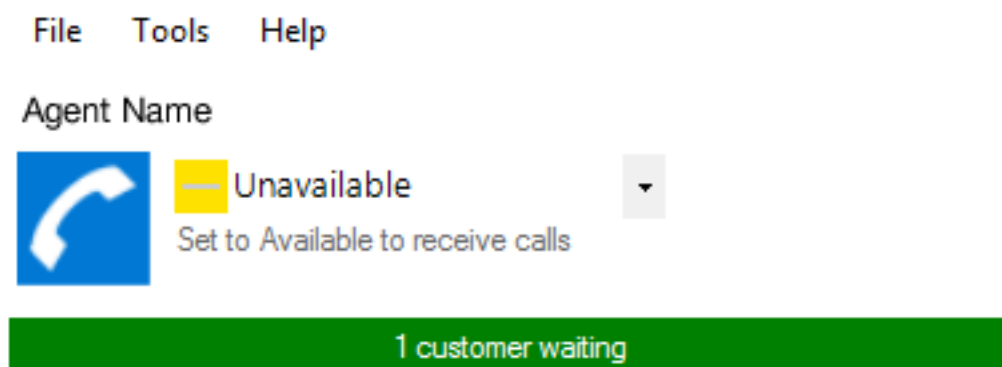
1.8 Video

During a call, your local video will be displayed in a small window, with the endpoint's video taking the primary focus.
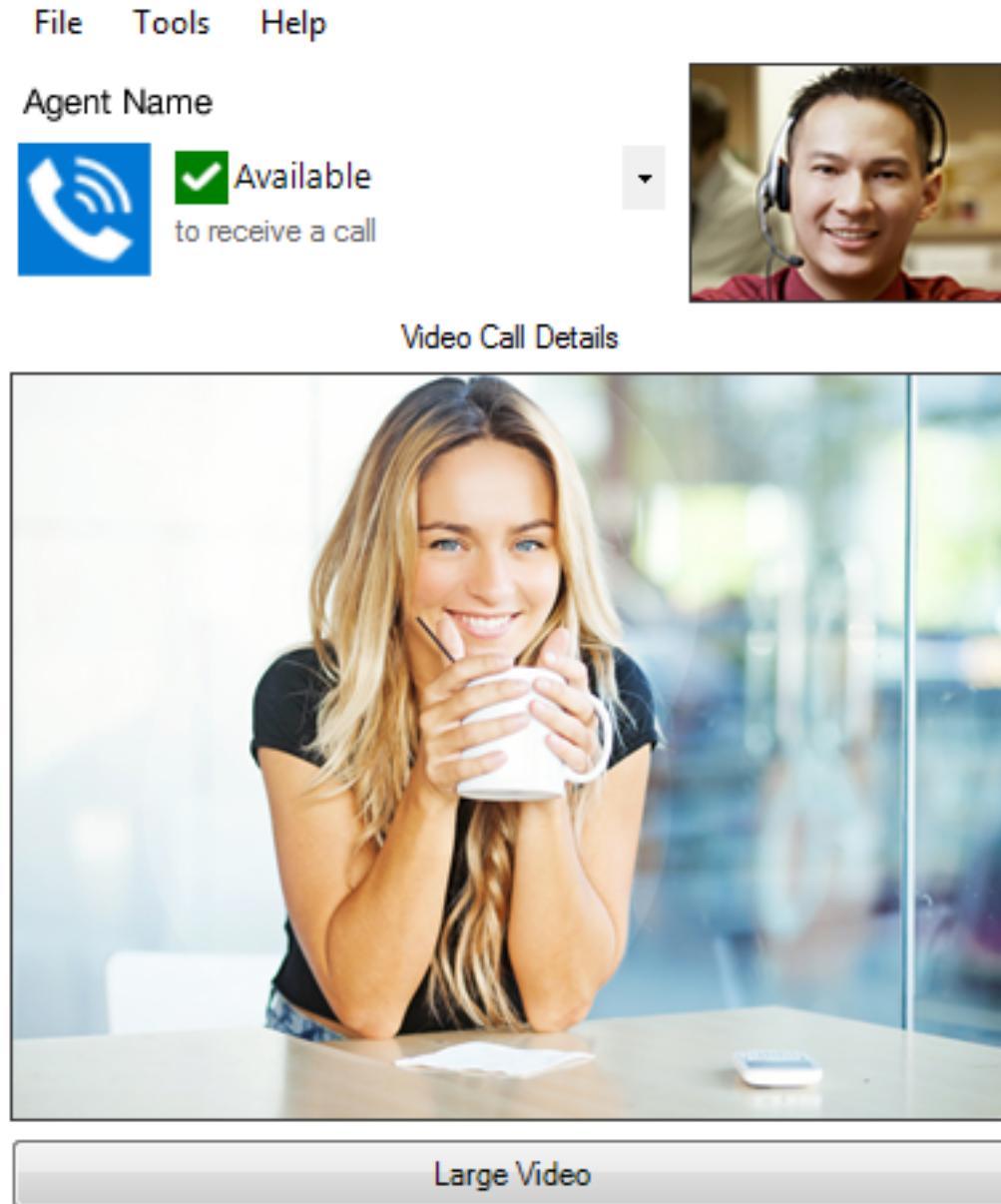
Tip: Look directly into the camera. It may be tempting to look at the customer in when speaking, but the experience will be more beneficial for the customer, the more the agent looks directly into the camera.

1.9 Studio Tabs

The LE Studio includes several tabs along the top of the LE Studio window which help the agent find and share information and conduct administrative tasks.

1.9.1 Web Browser & Intranet

These tabs are web browsers embedded inside the LE Studio. They function like any normal web browser.

To share content from the web browser, simply click on the share button that resembles a paper airplane.

1.9.2 Session Setup Helper Tab

The Session Setup Helper tab is organized into the following sections. 1 2 3 5 4 7 6 8

1.9.3 Call Type & Status

This section will display options to update the current type on the left-hand side, which will inform what Script should be displayed and what is expected of the Customer's View, as a result.

1.9.4 Notification (Survey Response) Tab

The Survey Response tab is optionally enabled in the Live Expert Enterprise.

Similar to the Notifications Panel, this Studio Tab displays a table of all notifications received by the logged in agent for the current day.

1.10 Notifications

Currently the only Notifications supported within the Live Expert Studio are Post-call Survey Responses. Others may be added in the future.

1.10.1 Alert

Alerts are displayed for 10 seconds before collapsing, or until the close button (X) is clicked. Only one alert is displayed at a time, and clicking the body of an alert will open a window displaying the entire contents of a Notification.

1.10.2 Panel

The Notifications Panel, opened via the Icon in the upper-right hand corner, expands to display the 40 most recent notifications received in the current day, from most- to least-recent.

1.11 Studio Workflow

1.11.1 Call Invitation

The Expert Enterprise server is aware of the status and expertise of every agent logged into the system. When a customer requests an agent, the Expert Enterprise determines which agent is available and best qualified to address a customer's interest. The Studio presents a video call invitation form with information about the call including any Custom Session Fields (see the Enterprise User Guide) and plays a ring tone for the selected agent.

The agent may accept the invitation and start the video call by clicking the Answer button.

Declining an invitation sets the agent's status to Unavailable and puts the customer in queue for another qualified agent.

1.11.2 Video Call Process

Tip: Greet the customer with a smile. It's just as important to greet the customer with a smile and friendly tone as it is when in a traditional retail service environment.

Tip: Speak Slowly & Clearly. In many cases, using the Live Expert system will be the first time customers have used video-chat technology for customer service. To help set the pace and tone for the video call, it is important for the agent to lead by example, speaking slowly and clearly. The customer will likely follow the lead, resulting in a positive experience for both participants.

1.11.3 Video Call Controls

Share content, adjust volume, and restart or transfer calls easily.

1.11.4 Text Chat

In certain cases, it is helpful to have the ability to send a text chat message to the LE Anywhere customer's screen using the Text Chat tab. Type the message and click send. The message is presented to the customer.

1.11.5 Ending a Call

Click the End Call button at the conclusion of a video call. A confirmation dialog is presented.

Once the call is ended the Call Notes tab is presented for the agent to complete documentation about the video call, including customer information (if required) and call reason and disposition.

After the Call Notes are completed, the agent is automatically set to Available status so they can receive video call invitations.