

ExpressDesk – Service Desk agent user guide

How to install and use ExpressDesk's Agent App as a Service Desk agent



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Table of Contents

1	Introduction.....	4
1.1	What's New in version 2.3.6?	4
2	Installation for PC	9
2.1	ExpressDesk2.3 presence and notification app Installation for PC.....	9
2.1.1	Make the Notification icon visible in Windows 10	10
3	Installation for MAC	11
4	Configuration.....	13
5	Automatic Updates.....	17
6	Using ExpressDesk 2 as a Service Desk Agent	18
6.1	Pre-requisites	18
6.2	Start a new chat shift.....	18
6.3	Start the ServiceDesk Agent client	19
6.4	Authentication.....	19
6.5	Presence Status	19
6.6	Queues.....	20
6.7	Receiving an incoming chat conversation	21
6.7.1	Support of Multimedia files.....	26
6.8	Invite Cancellation	28
6.9	Chat Transfer	28
6.10	Chat real-time translation	30
6.10.1	Concept.....	30
6.10.2	Single-Language view	31
6.10.3	Dual-Language view	32
6.10.4	Provide translation feedback	34
6.11	Update Chat transcript.....	36
6.12	Working with multiple chats in parallel	37
6.13	Chat Timer	37
6.14	Display Live Stats and Queue details.....	38
6.15	Password Reset	40
6.16	Edit Predefined Messages	42
6.16.1	Open the Message editor	42
6.16.2	Add a new message	42
6.16.3	Remove a message	44

6.16.4	Modify an existing message	44
6.16.5	Create a sub-menu	44
6.17	Backward compatibility mode.....	46
6.18	Outbound Chat sessions.....	47
7	Frequently asked questions	49

1 Introduction

This guide will guide the Service desk agent / support analyst in:

- installing
- configuring
- keeping updated
- and using

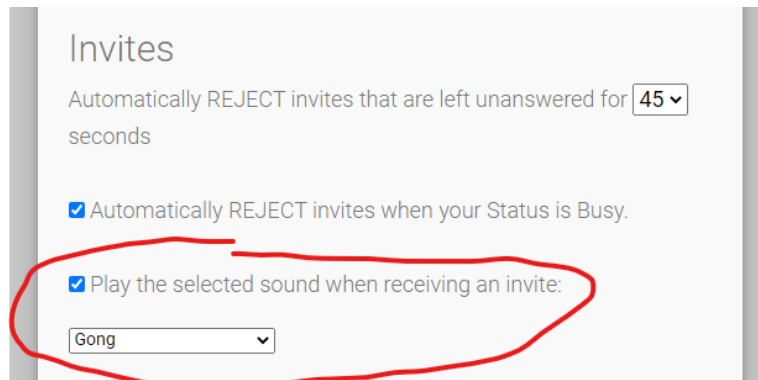
the ExpressDesk2.3 Agent App, and to use ExpressDesk 2.3 as a service desk agent.

The ExpressDesk2.3 app for Service Desk agents was designed to allow service desk agents to serve, in a unified way, incoming chat sessions originating from either Skype for Business, Microsoft Teams, or other chat sources (such as WeChat, WhatsApp, Facebook Messenger, Viber, Telegram,... the availability of these chat platforms depending on your enterprise setup).

1.1 What's New in version 2.3.6?

The following features were released in the latest version (2.3.6):

- In case the agent changes the username or the servername in the "options", the application will reconnect by itself (in the past, it was required to stop and start the application)
- Sounds for offered chats: Service Desk agents can now enable a sound to be played when the "new chat invite" is displayed, and select which "ringtone" should be played, via the "Options" menu:



The following features were released in previous version (2.3.4):

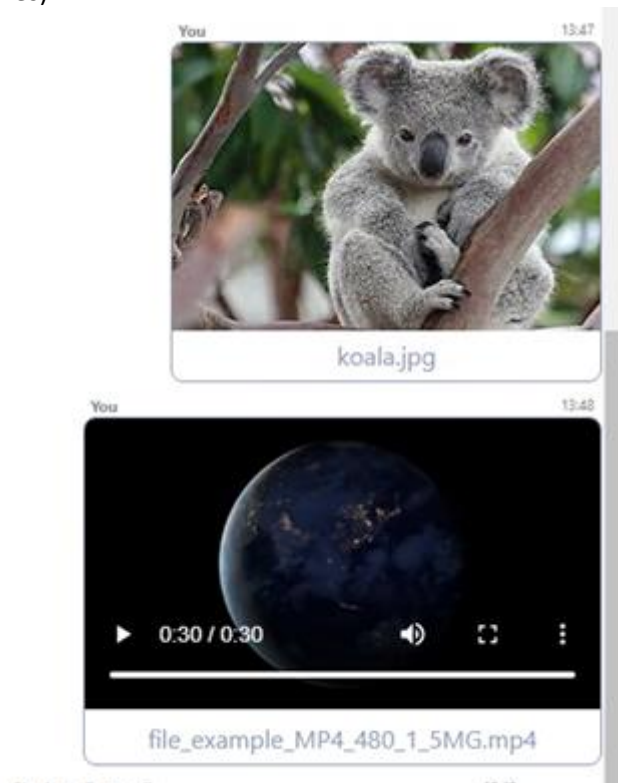
- Support for user authentication through a reverse proxy: in case the agent attempts to connect to an ExpressDesk Chat Middleware server that is located behind a reverse proxy which raises an authentication challenge, the authentication page will be displayed. After successful authentication, the established session will be kept alive and will be used for establishing chat sessions
- Removal of the values "60" and "90" in the Invite Timeout setting of the "Options", and introduction of the value "55". The new default value is "45".
- Support of invite Cancellation sent from the server, in case the chat was manually forced to another agent while the Invite card was being displayed to the system-selected agent
- Fix of issues in case the agent signs in without "sip:" or with "SIP" in upper case in front of his login id.

The following features were released in older versions (2.2.20):

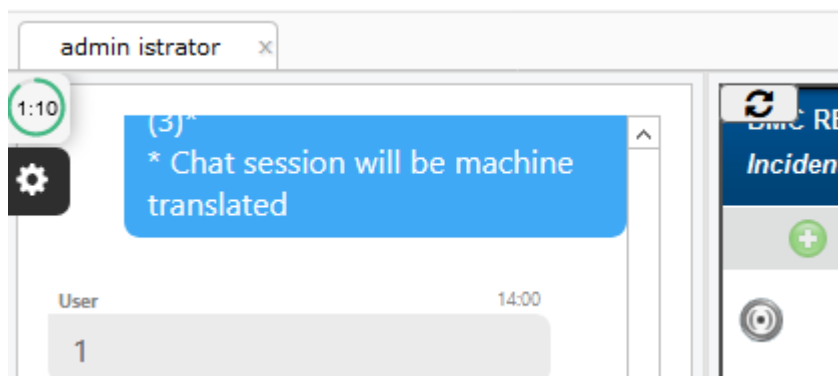
- Choose between ExpressDesk's optimized view and the MS Windows standard window behaviour for the "Live Stats" window

In case the latest ExpressDesk Middleware (version $\geq 2.3.6$) was deployed on your infrastructure, the following changes will be available to you:

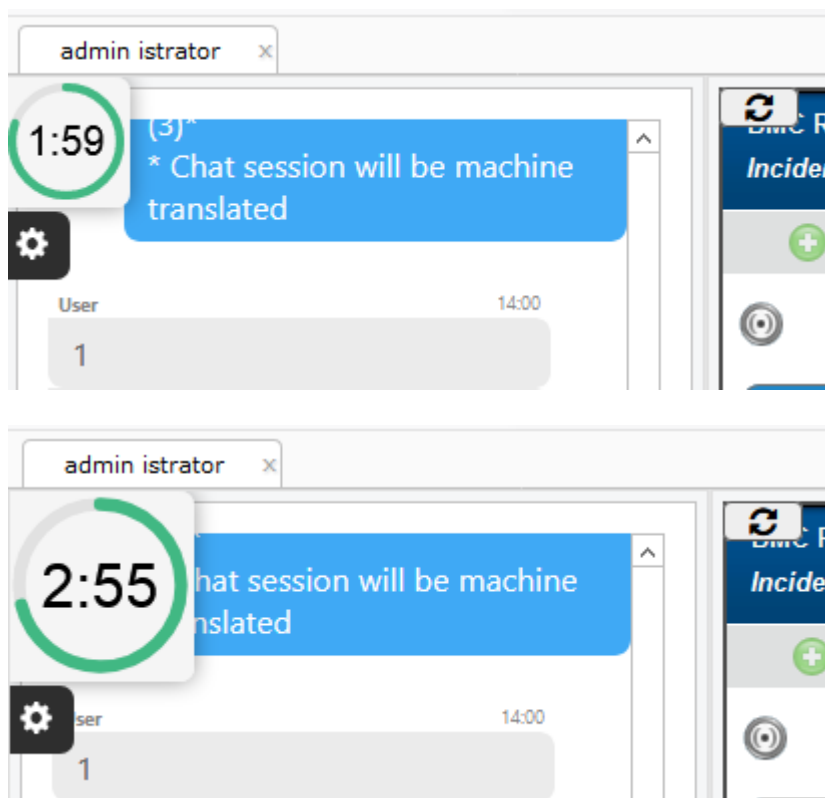
- Images and videos uploaded by the service desk agent are now displayed in the chat (same as when they are received by the end user – in the past those were displayed as normal files):



- There is now a timer that counts the time spent on each chat (a different value is displayed on each chat tab)



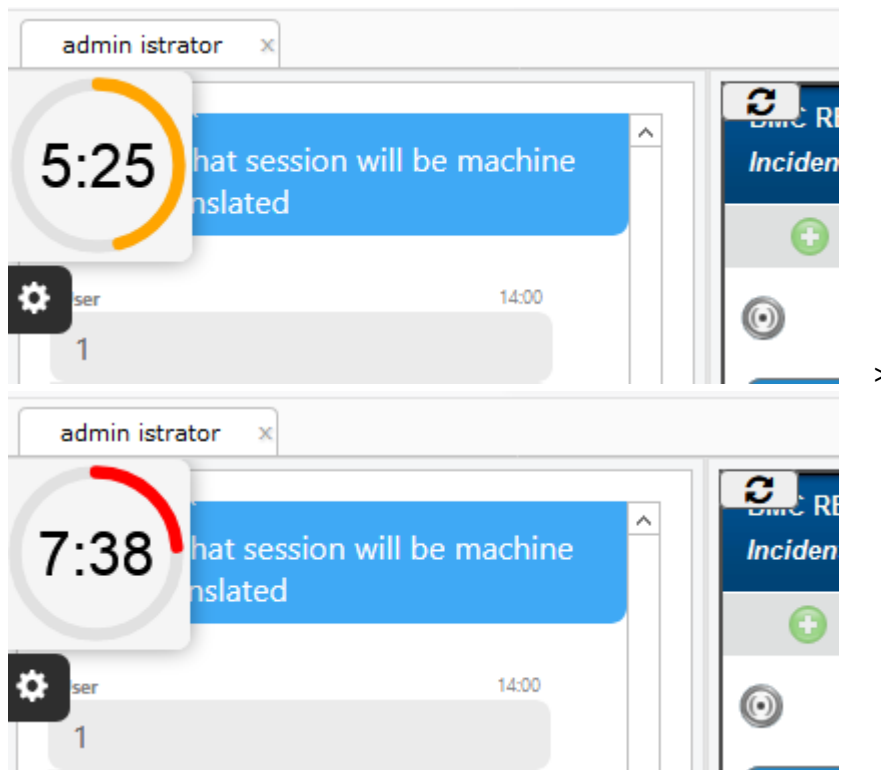
By clicking on the timer, we can change its size to medium or big, or back to small. Each click on the timer changes its size this way: small > medium > big > small > medium > big... etc :



The selected size will be saved from one session to another, so if an agent prefers the medium size, he can just leave it at the end of a chat, and the next time he will receive a chat, the timer will be displayed in medium size (except if the agents clear their cookies or change the configured browser in the app options, in which case it will be reset to the small size)

The round surrounding the time represents an indicative countdown. The total duration represented by the round can be configured by the administrator.

After a configurable duration, that round will turn orange, then red (The configuration that drives this is managed from ExpressReport – as a single setting that applies to all agents) :



When the conversation ends (i.e. the user left the chat or the inactivity timeout was reached) the countdown stops.

- Issue caused by quotes in the end user name is fixed

In case the latest ExpressDesk Middleware (version $\geq 2.2.20$) was deployed on your infrastructure, the following features will be available:

- Service Desk agents can configure their own predefined messages, from within the Agent App or from an active chat
- Possibility to select "All Queues" from the chat transfer menu
- In case service desk agent pastes "mixed-content" (images and text, for instance copied from MS OneNote) from the clipboard inside the chat, ask if it should be pasted as text, image or both
- Support for profanity check: when the real-time chat translation is enabled, in case a profanity is detected in the text resulting from a translation (in case profanity check is supported by the translation API), the system will not send the message to the end user, and will display the incriminated message in orange and send a warning to the agent
- The color of hyperlinks sent from service desk agents appear in a contrasting color

2 Installation for PC

In case you already have installed the ExpressDesk2.3 presence and notification app on your computer, you can skip this chapter.

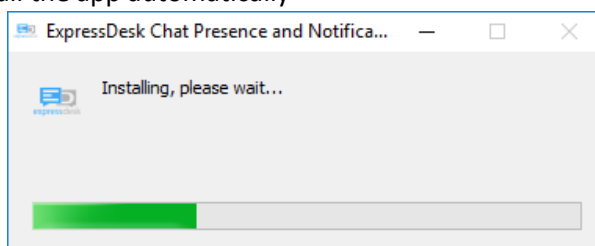
In case you have a previous version of ExpressDesk presence and notification app (2.0, 2.1 or 2.2), make sure you have the "Automatic update" feature enabled (see section 5 "Automatic Updates" of this guide) and restart the application to have let the update install automatically. In case the "Automatic Update" option is not available or is not working, follow the steps in this chapter to perform the update manually.

2.1 ExpressDesk2.3 presence and notification app Installation for PC

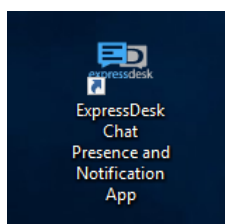
1. Download the installer from the following URL (select "PC" to download the windows installer)
<https://support.express-desk.com/support/PresenceAndNotificationApp>

2. Double-click on the file to start the Installer.

3. The installer will install the app automatically



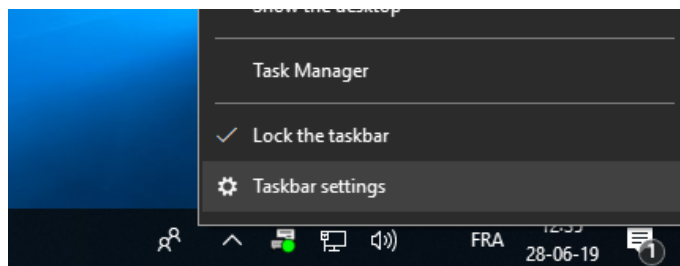
4. At the end of the installation process, a new icon will appear on your desktop, and a new program will appear in the notification area of your taskbar



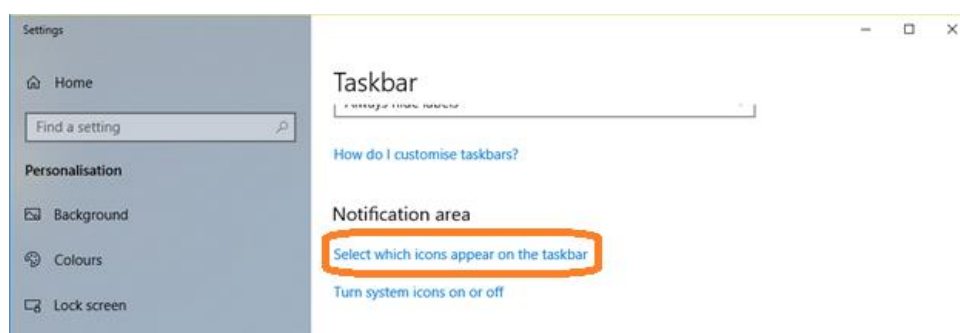
2.1.1 Make the Notification icon visible in Windows 10

Follow these steps, under Windows 10, to make sure the ExpressDesk presence and notification app is always visible.

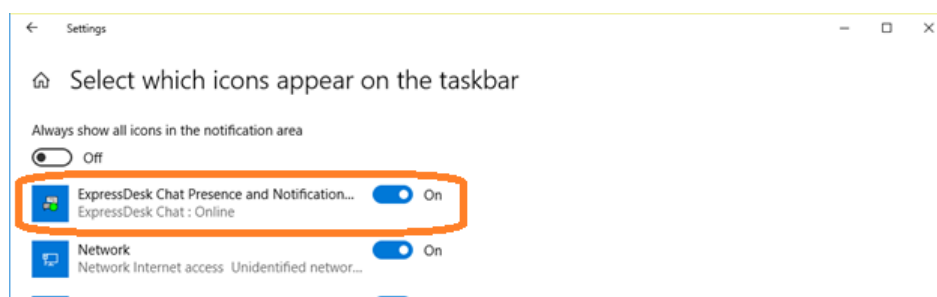
Right-click on your task bar, select "Taskbar settings":



Scroll down to "Notification area" and click "Select which icons appear on the taskbar" :



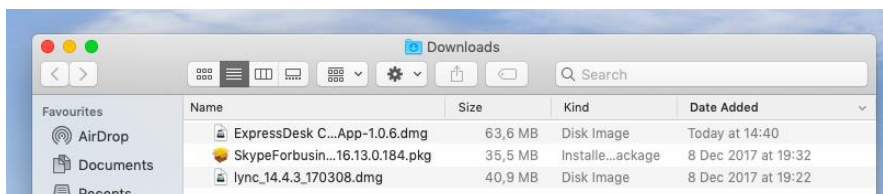
Locate the application "ExpressDesk Chat Presence and Notification..." and switch the slider to "On" :



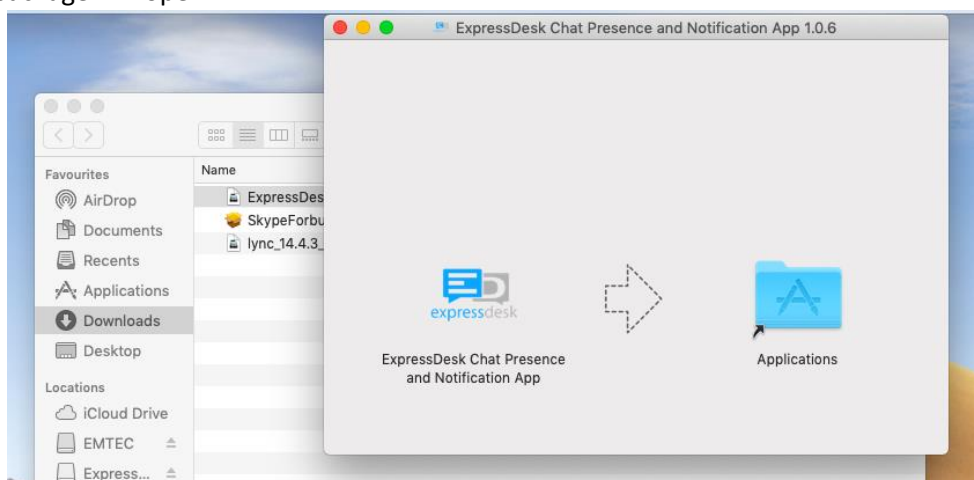
3 Installation for MAC

In case you already have installed the ExpressDesk2.3 presence and notification app on your computer, you can skip this chapter.

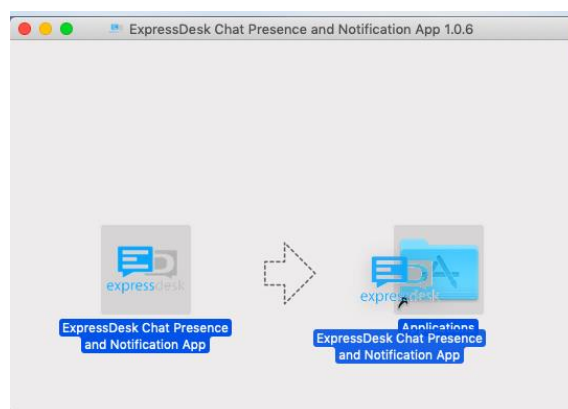
1. Download the installer from the following URL: (select "MAC" to download the installer for Apple Macintosh computer)
<https://support.express-desk.com/support/PresenceAndNotificationApp>
- 1.
2. Double-click on the file



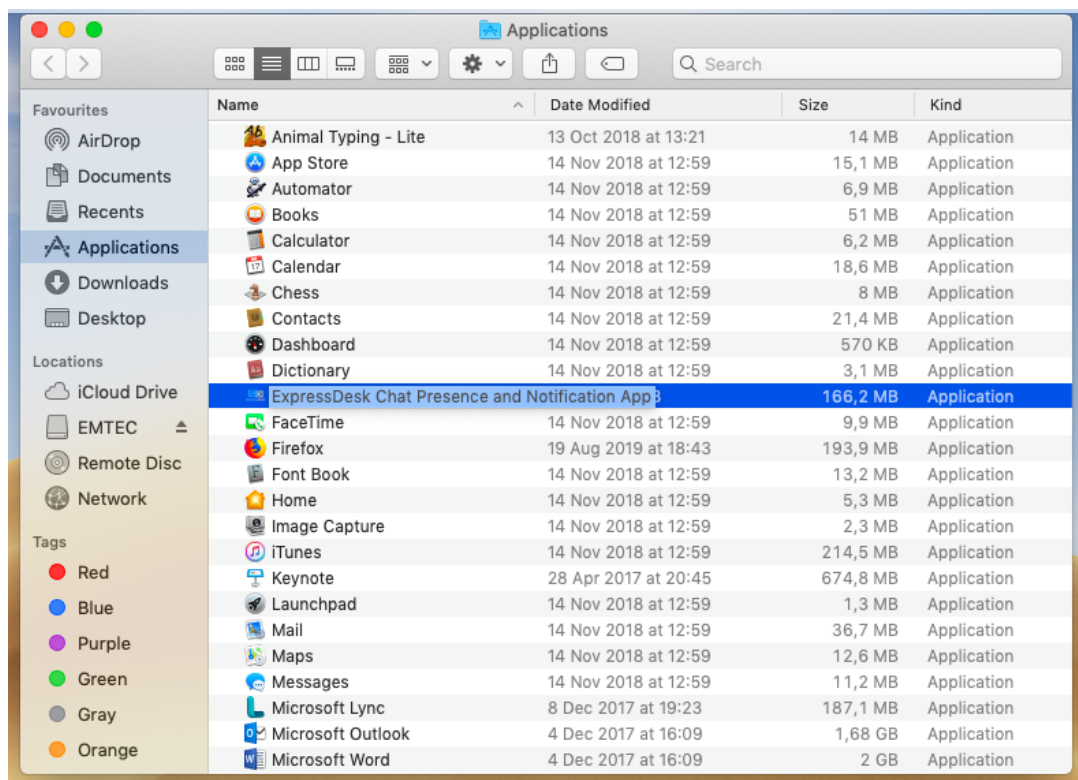
3. The package will open:



4. Drag-and-drop the "ExpressDesk Chat Presence and Notification App" to "Applications"



5. At the end of the installation process, a new app will appear in your list of applications:

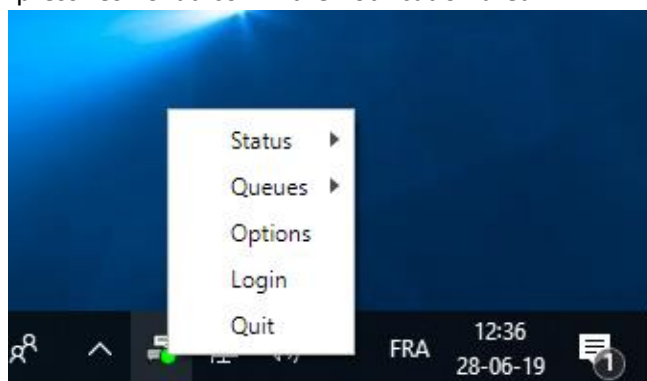


Start the App by double-clicking on it from the "Applications" window.

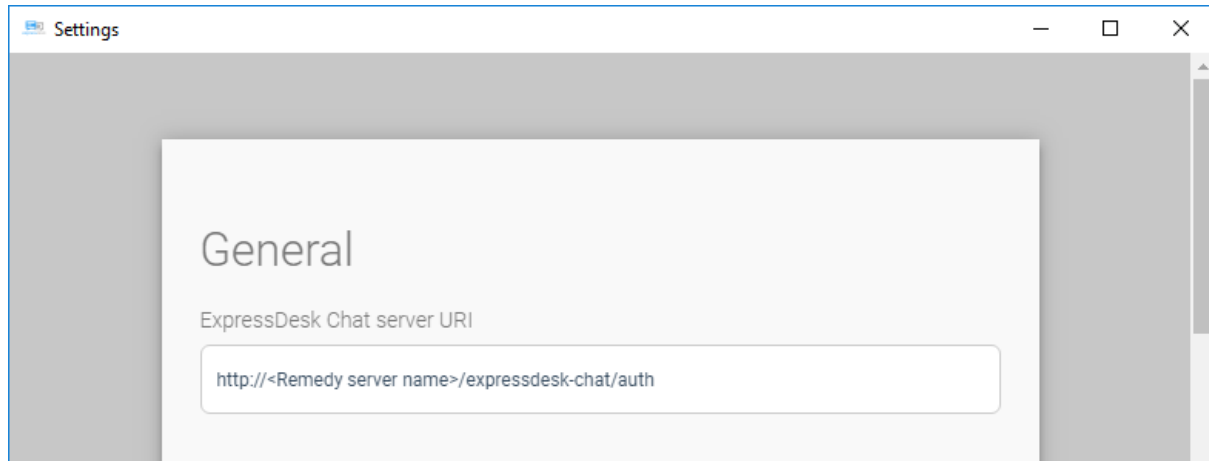
4 Configuration

Before using the ExpressDesk Presence and Notification app, you need to configure it with the server it needs to connect to, and with your credentials.

1. Make sure that ExpressDesk Presence and Notification app appears in the Notification area. In case it does not appear, start it by double-clicking the shortcut that was created as part of the installation procedure, and verify that it is always shown in the notification area using the instructions above.
2. Right-click on the ExpressDesk Chat icon in the notification area:



3. Click on "Options"
4. In "ExpressDesk Chat server URI", enter the following URL:



Contact your administrator to get the URL. It should be in the form :

<https://<Remedy web server name>/expressdesk-chat/auth>

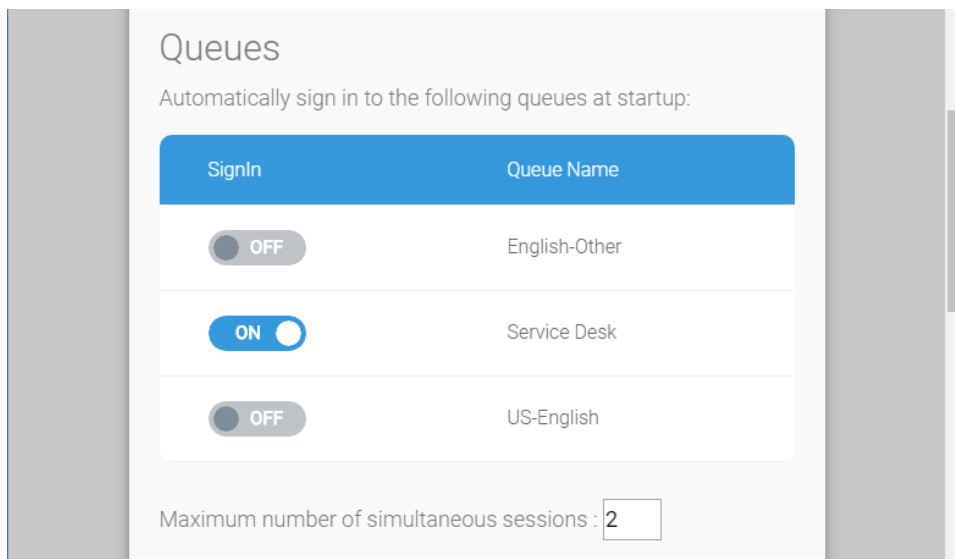
5. In "User Login ID", enter "sip:" followed by your corporate email address
 - a. for example, if your email address is "allen.allbrook@contoso.com", enter the following User Login ID: "sip:allen.allbrook@contoso.com"
 - b. make sure that the same ID is configured as a member of a Queue in the ExpressDesk SaaS Manager
 - ~~c. be careful, this is case sensitive~~ (case sensitivity removed as of version 2.3.4, provided ExpressDesk servers were upgraded too)

6. Configure the General options to your liking:
 - Store User Login ID : stores the User login ID locally so that you won't have to type it again the next time you connect from this computer
 - Store Password in secure Password vault : stores the Password locally (using your operating system's secure password vault) to automatically authenticate the next time you login
 - Automatically set status to : choose the status you want to be applied automatically upon connection (Available, Away, Busy, Offline)

7. Queue configuration :

Note: you must be connected to the system for this option to be available.

Use the sliders to automatically Sign In to some of the queues you are a member of. This allows you to be immediately available for inbound chats for the selected queues upon application startup.



SignIn	Queue Name
<input type="checkbox"/>	English-Other
<input checked="" type="checkbox"/>	Service Desk
<input type="checkbox"/>	US-English

Maximum number of simultaneous sessions :

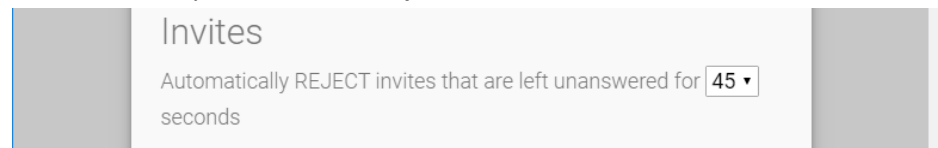
Set the maximum number of simultaneous sessions to limit the maximum number of parallel chat sessions you want to have with end users.

Note: The highest value you can configure is **8**, except if you use Internet Explorer, where the maximum is **6**. Make sure you do not exceed these limits.

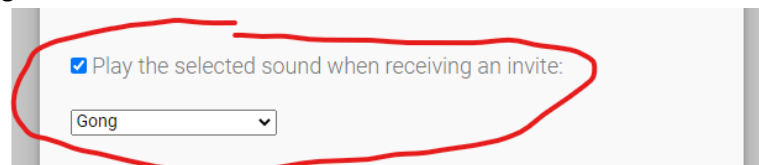
8. Automatic invite rejection: In case you do not accept an incoming chat session for a certain duration, it will be automatically rejected and the system will look for another available agent in the same team (and transfer to the Overflow queue in case no other agent is

available; which means that if you are also member of the overflow queue, you might receive the same invite a second time).

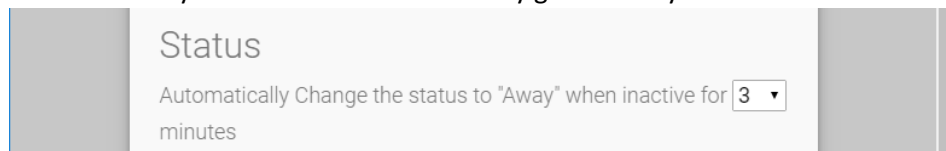
This setting allows you to configure the duration before an unanswered incoming chat session is automatically considered as rejected :



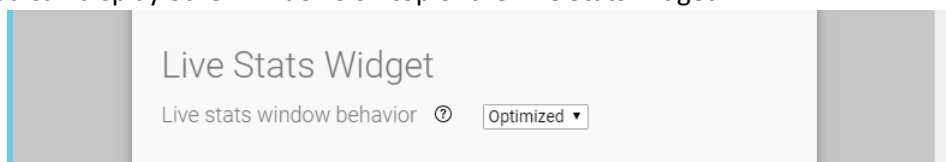
9. Play a sound when you receive an invite: To hear a sound notification in addition to the visual notification that appears on your screen while being invited to a chat, tick the following checkbox and select the ringtone you want to hear. This requires speakers to be available on your system and the system volume should not be muted. When selecting the sound in the Options menu, the you can hear the sound once. The sound will be repeated continuously when receiving a chat invite.



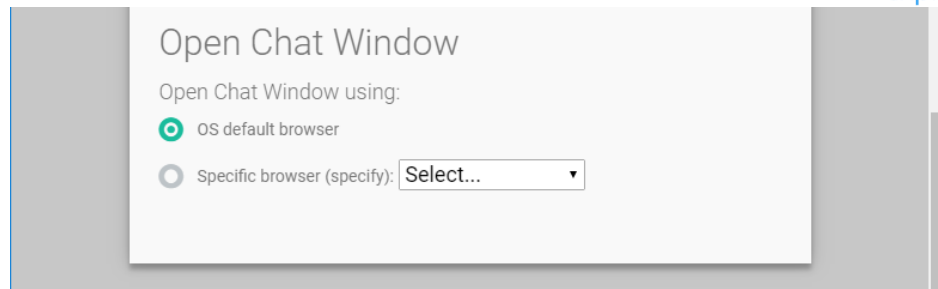
10. Automatic status change to "Away": Your status will automatically change to "Away" in various circumstances: in case you lock your workstation, in case the screensaver is on, or in case you are inactive (= not moving the mouse, not using the keyboard) with your computer for a certain duration. The following setting allows you to configuration that inactivity duration after which your status will automatically go to "Away":



11. Live Stats Widget window behaviour: This setting lets you choose between two type of window to display the Live Stats:
 - Optimized: the live stats are always visible and use less space on your screen. This type of window lets you place it over other windows and won't be hidden if when you switch the active window. This is useful in case you want the live stats to be always visible.
 - Standard: the standard window behaviour: you can resize the window as a normal window, and you can display other windows on top of the Live Stats widget.



12. ExpressDesk2.3 is a web-based chat application. When you accept a chat invite, the chat application needs to load in a browser. You can select your favourite browser using the "Open Chat Window" configuration section:



Important Note:

BMC Remedy MidTier only allows you to be connected from a single browser, on a single computer, at any given time.

The Express-Desk web-based chat will load a BMC Remedy window in the chat session. This means that the browser you select using this setting MUST be the SAME browser as the browser you ALWAYS use to access BMC Remedy.

If you don't use a specific browser to access BMC Remedy, it is better to leave this setting to its default value : "OS default browser".

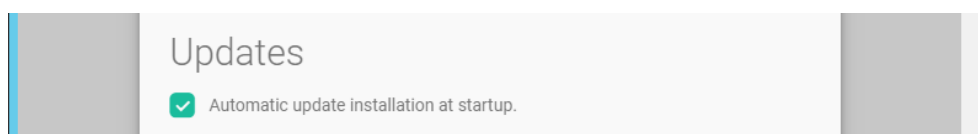
In case you get errors such as "User currently connected from another machine" or an "Override" prompt in Remedy while using or after using ExpressDesk chat, consider changing this parameter to reflect the actual browser you are using to access BMC Remedy.

You should ALWAYS use the same browser to access BMC Remedy.

13. After all settings are configured to your liking, close the "Settings" screen by clicking on the cross. This will save your settings automatically.
14. Leave the ExpressDesk2.3 app by right clicking on its icon in the notification area and select "Close", then restart the application by double-clicking on the icon on your desktop.

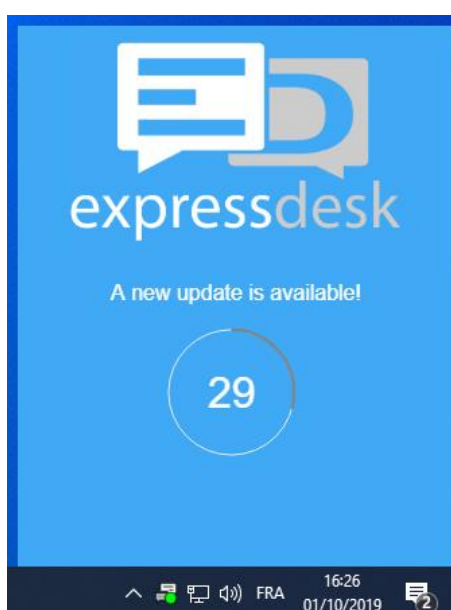
5 Automatic Updates

To enable automatic updates, check the checkbox "Automatic update installation at startup" in the "Options" window :



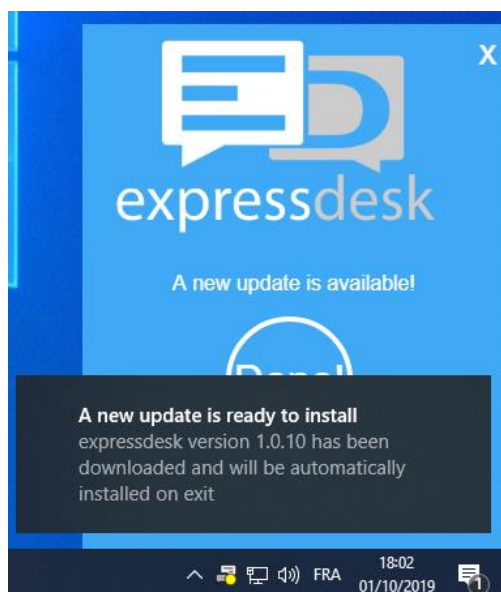
It is recommended to check this checkbox to get the latest updates and bugfixes of the ExpressDesk application.

At startup, the system will automatically check for updates in the background. In case a new update is available, the following popup will appear in the lower right corner of the screen:



The download will start immediately, and the progress will be displayed in the notification dialog. You can continue to work and receive incoming chats while the download is progressing. You can close the update notification popup by clicking on the cross button in the top right corner, as the download will continue in the background.

When the download of the new version is finished, the following notification will be displayed :



You can close the notification by clicking on the cross and continue your work, in which case the update will be installed automatically the next time you will leave the application, or you can trigger the installation of the update immediately by clicking on the "Restart Now" button :



6 Using ExpressDesk 2 as a Service Desk Agent

6.1 Pre-requisites

Make sure you can access the BMC Remedy environment you are targeting with the browser you selected in the configuration step.

6.2 Start a new chat shift

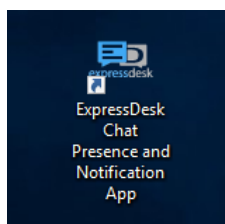
When starting a chat shift as a service desk agent, perform the following actions

- Start the ServiceDesk Agent client
- Authenticate
- Set your presence status to "Available" (we recommend you set it automatically through the "Options")
- Select the queues that you want to serve (we recommend you set them automatically through the "Options")

This Chapter further describes how to perform these steps.

6.3 Start the ServiceDesk Agent client

Double-click the icon located on your desktop, and the program will appear in the notification area of your taskbar



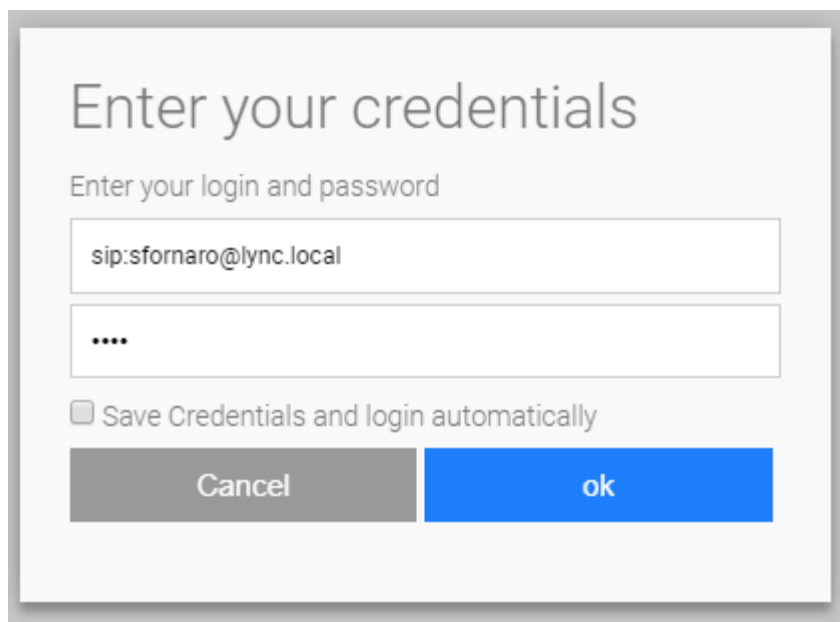
6.4 Authentication

When starting the ExpressDesk app, you will be prompted for your credentials (unless you have checked the box "save credentials and login automatically")

In "User Login ID", enter "sip:" followed by your IKEA email address :


- for example, if your email address is "allen.allbrook@ikea.ingka.com", enter the following User Login ID: "sip:allen.allbrook@ikea.ingka.com"
- make sure that the same ID is configured as a member of a Queue in the ExpressDesk Test SaaS Manager






In the password field, type the password provided by your administrator, and click on "OK".


 A light gray dialog box titled "Enter your credentials". Below the title is the instruction "Enter your login and password". There are two input fields: the first contains the text "sip:sfornaro@lync.local" and the second contains four dots "....". Below the input fields is a checkbox labeled "Save Credentials and login automatically". At the bottom are two buttons: a gray "Cancel" button and a blue "ok" button.

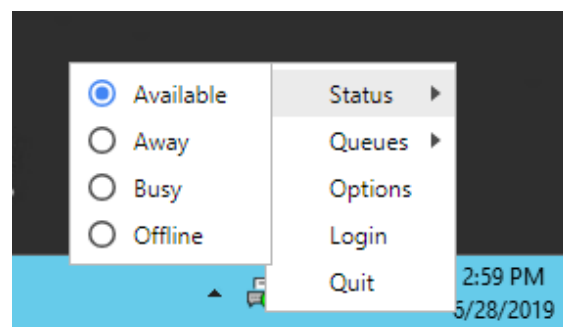
6.5 Presence Status

The icon displayed in the notification area will reflect your current status as a service desk agent for chat purposes :

-  : Green : you are Available; you can receive an incoming chat at any moment

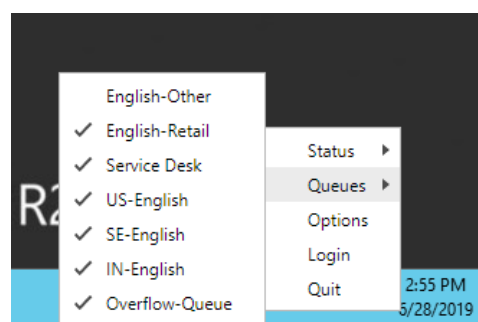
-  : yellow : you are Away; you cannot receive any incoming chat in this status; in case you move your mouse or touch your keyboard, your status will change back automatically to its previous value
-  : red : you are Busy; you cannot receive any incoming chat in this status, but you can start outbound conversations.
-  : grey : you are Offline; you cannot receive any incoming chat in this status.
-  : red with a white cross: you are disconnected due to a loss of network connectivity with the ExpressDesk chat server URI. All communications (inbound and outbound) are affected and it is likely that you also cannot access BMC Remedy. Try to restore your network connectivity as quickly as possible. After restoring the network connection, you don't have to do anything special, as the system will try to reconnect you automatically.
-  : no color: you are not connected yet, the system is trying to connect you, or you are connected but you didn't choose your status yet. In case the icon remains in that status for a long time, verify that all settings are properly configured and that you have network connectivity to the URL that you configured in the settings.

You can change your status by right-clicking on the ExpressDesk icon in your notification area, and selecting "Status" in the menu:



6.6 Queues

Right-click on the ExpressDesk icon in your notification area, and select "queues" :



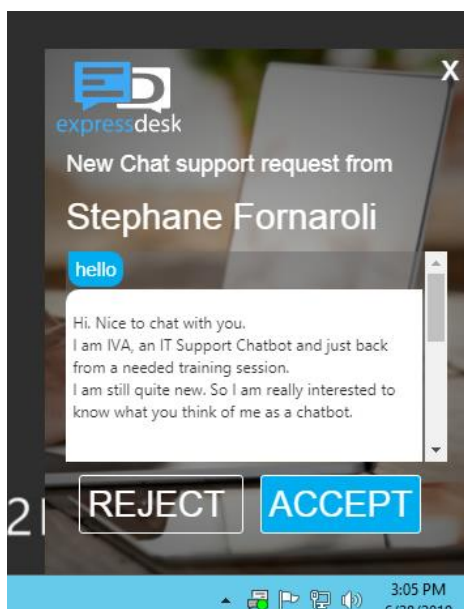
Tick the checkbox in front of the queues you want to sign in to, and clear them in case you want to sign out of a queue.

In case you want to sign in to some queues automatically the next time you login, use the "Queue Configuration" feature describes in the "Configuration" chapter of this document.

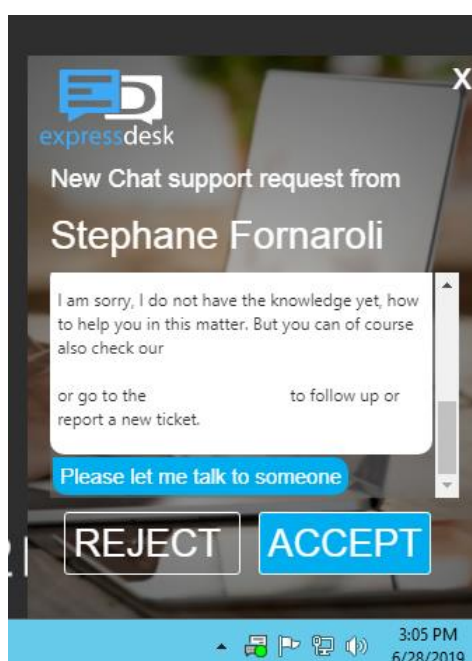
6.7 Receiving an incoming chat conversation

If you are in status "Online", and signed in to at least one support queue, you can receive an incoming chat session that is assigned to your queue(s).

When a new inbound chat session is assigned to you, a popup will slide from the bottom right corner of your screen :



This will display the name of the end user who needs help, as well as the chat transcript of the interaction this user had with the chatbot.



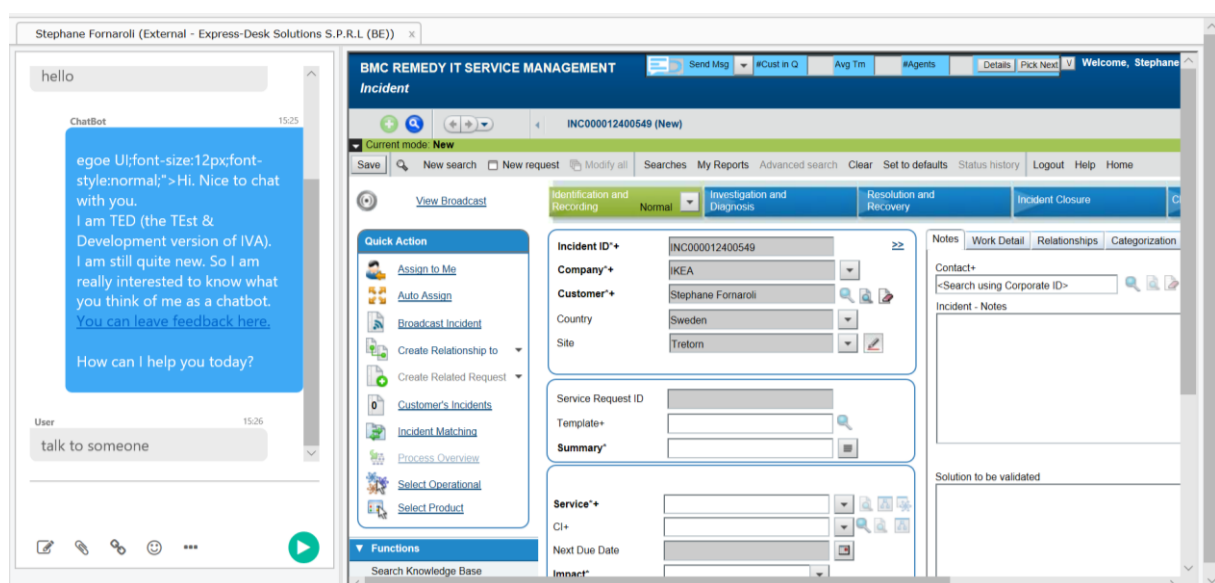
This gives you the opportunity to review the purpose of the user's request, and accept the conversation knowing its purpose upfront. You can scroll the transcript before accepting or rejecting the invite.

Click on "Accept" to accept the conversation, and "Reject" if you cannot help the user.

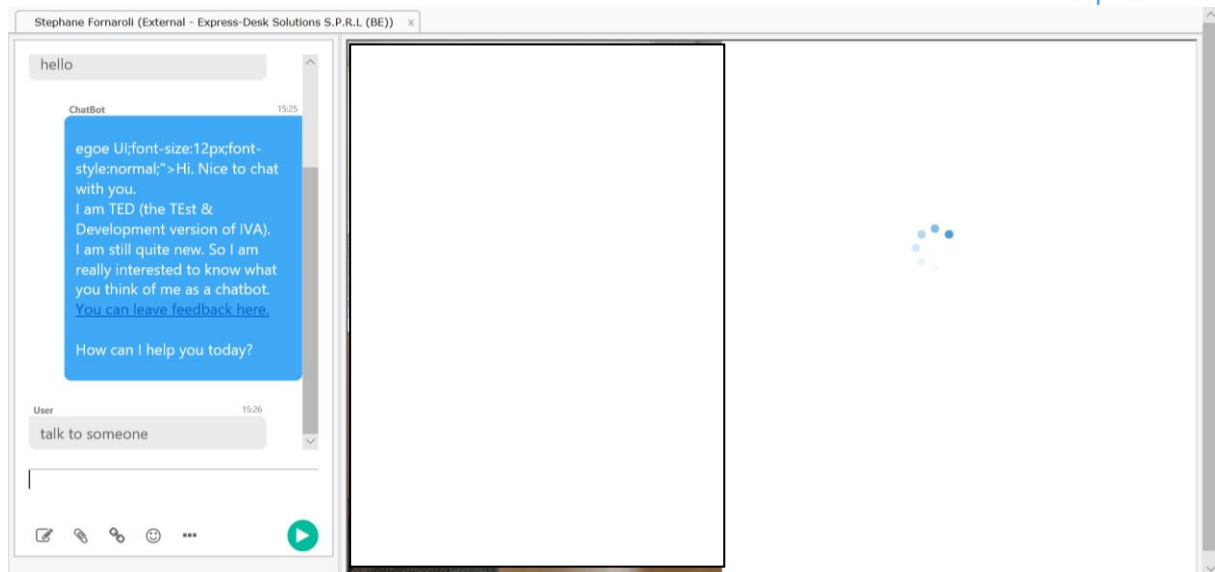
In case you reject the conversation, it will be assigned to another agent in the same queue. In case all agents of the queue reject the conversation, it will be assigned to another queue (the overflow queue). In case all agents reject the conversation, the user will be told that no agents are available and the conversation will end.

In case you leave the invite unanswered for a certain duration of time (configurable through the settings as detailed in this document's "Configuration" chapter) it will be automatically considered as "Rejected".

If you accept the invite, the following window will appear in the browser you selected in the "settings" (refer to the "configuration" chapter for more details about browser selection) :

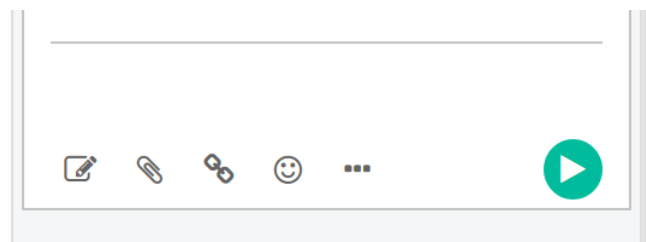


Note: it might be that BMC Remedy will take some time to load. In which case this is what would be displayed:



In this case, wait for the Remedy single sign on to authenticate you

You can start chatting by typing a message in the chat area:

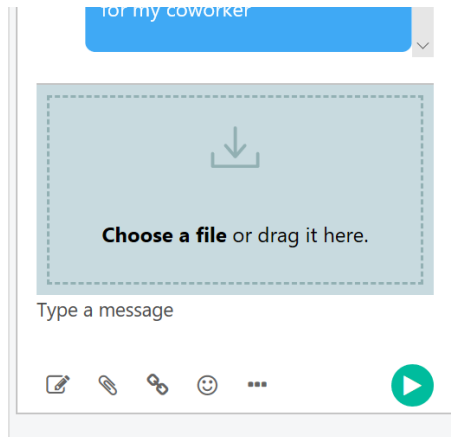


This chat area provides a few icons, offering the following features:

- Text formatting: click on the pencil button to turn on new buttons over the typing area. You can now format the message you're about to send by selecting the text and clicking on the Bold, italic, underline, strikethrough and Highlight icons :



- File transfer : click on the paperclip icon to make the following area appear :

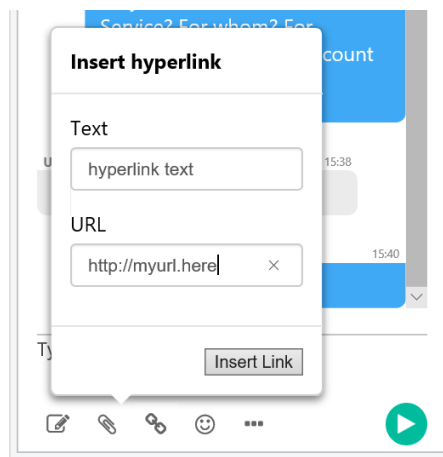


You can drag-and-drop files inside that area, or click on "Choose a file" to trigger the file selection dialog.

Send one file at a time.

To close the "File transfer area", click on the paperclip icon a second time (all these icons are "toggle" buttons : clicking on it a second time does the opposite action as the initial action)

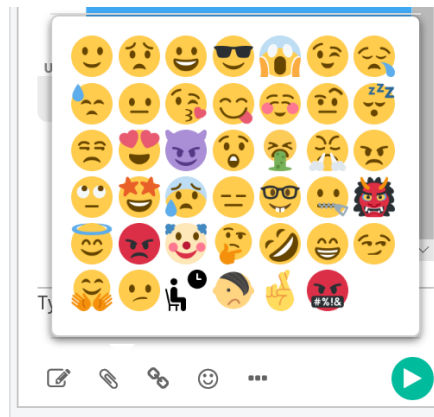
- Send hyperlink : click on the link button, then type the hyperlink text and the url and click on "Insert link", then send the message:



Note: to close the "send hyperlink" popup without inserting the link, click on the paperclip icon again.

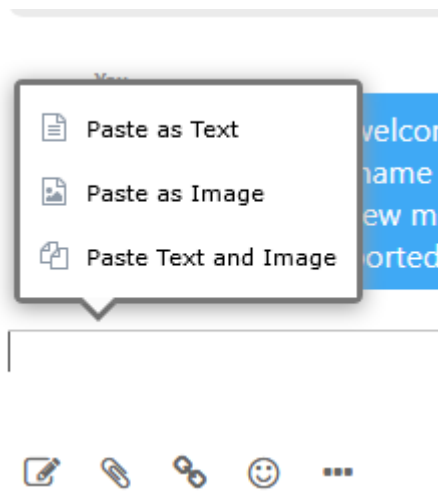
In case users send URLs in chat messages without specifying "http(s)://", these might not be interpreted as hyperlinks automatically. In such case, please copy and paste the URL in a different browser tab.

- Send smileys / emoticons / emojis : click on the smiley icon and select the smiley you'd like to send, then send the message



Note: to close the "send smiley" popup without inserting a smiley, click on the smiley icon in the lower bar once again.

- Send Predefined messages: click on the "..." icon and select the message you want to send. Upon selection of a text, you can modify it, and click on the "Send" button or the [Enter] key to send the message.
- Paste (CTRL + V) pictures or screenshots in the chat typing area to send them to the end user. In case you copied mixed contents (for instance text and image, such as when you copy an area from Microsoft OneNote), and paste the content of the clipboard to the ExpressDesk chat, the following contextual menu will appear:



Choose "Paste as Text" to paste only the text version of the clipboard contents into the typing area. You can modify the pasted text before sending it by clicking the "Send" button or hitting [Enter].

Choose "Paste as Image" to paste the contents of the clipboard as an Image. This will result in sending the image as an attachment immediately.

Choose "Paste Text and Image" to paste the text into the chat typing area and send the image version of the clipboard immediately. You can still edit the text in the typing area and send it by clicking the "Send" button or hitting [Enter].

- In case you want to send a message with multiple lines, you can hold the "Shift" key and press the "Enter" key to enter a carriage return without sending the message (pressing the "Enter" key alone would send the message).

6.7.1 Support of Multimedia files

In case the end user send a compatible file (see below for supported file format), depending on the browser used by the service desk agent, the file will be displayed in a user-friendly way. Audio and Video files will be displayed in a player.

- In case the end user sends a picture, the picture will be displayed as a thumbnail. Clicking on the picture will display it in full size in a separate browser tab.



- In case the end user sends a video or audio file, the file will be displayed as a player. The play/pause and volume button are available to the service desk agent. A download button below the player allows to display the file in a separate browser tab and to download the file from there.



Note: increasing the size of the chat area (by dragging the separator between the chat and the ticket) will increase the size of the pictures and video player, allowing for better visibility of the pictures or video player.

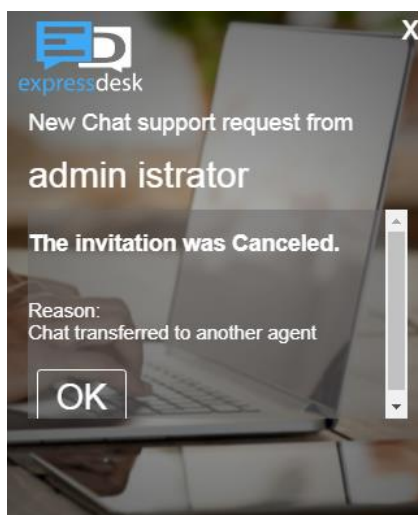
Compatible file formats depend on the browser used by the Service Desk agent :

	IE 11	Edge	Chrome	Firefox	Safari
<u>Images</u>					
JPEG	V	V	V	V	V
PNG	V	V	V	V	V
GIF	V	V	V	V	V
<u>Audio</u>					
MP3	V	V	V	V	V
WAV	X	V	V	V	V
AMR	X	V	V	V	X
<u>Video</u>					
MP4	V	V	V	V	V
WEBM	X	V	V	V	X
OGG	X	V	V	V	X

6.8 Invite Cancellation

After an agent received an invite for a chat session and before that agent actually accepted the invite, it is possible for a supervisor or for another service desk agent to intercept that chat session and assign it to another agent. For instance, in case a service desk agent uses the "Pick" features described in section "6.14 Display Live Stats and Queue details" of this guide, that agent could assign the selected chat session to himself.

In such case, the agent who was initially invited will receive a cancellation message, mentioning the reason for the cancellation:



In case an invite changes to this message after a few seconds, simply click on "OK" and wait for another invite to pop up.

6.9 Chat Transfer

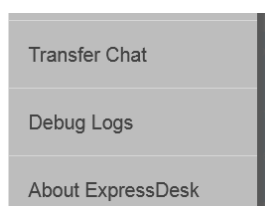
On-going chats can be transferred from one service desk agent to another colleague.

You need to save the active ticket before transferring the chat, as this ticket will automatically be retrieved and displayed to the colleague who will receive the chat.

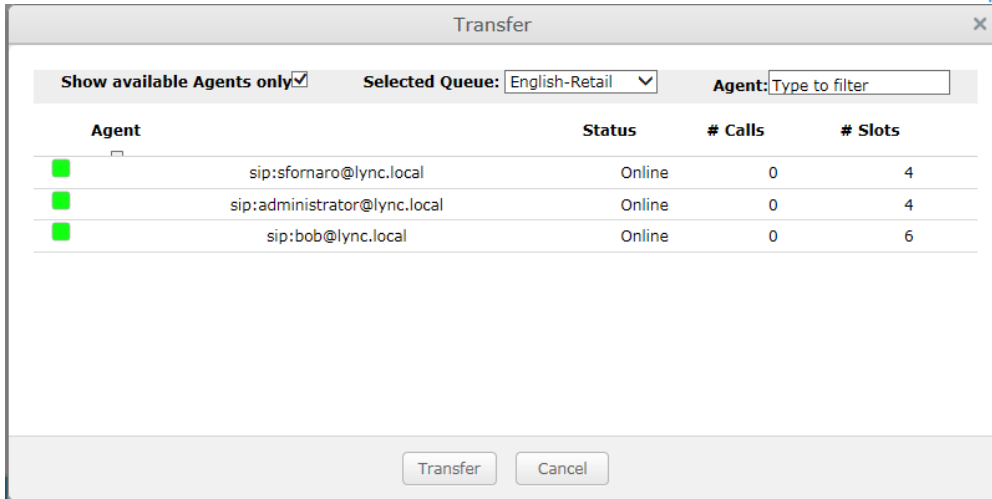
Click on the "Cogs" icon in the upper left corner of the chat you want to transfer:






Select "Transfer Chat":



A dialog will appear, displaying the list of service desk agents available to receive a chat:



Agent		Status	# Calls	# Slots
	sip:sformaro@lync.local	Online	0	4
	sip:administrator@lync.local	Online	0	4
	sip:bob@lync.local	Online	0	6

You can use the first row to filter the list of agents:

- Show available Agents only : check this checkbox to see only the agents who are in status "Available" and who have at least one free assignment slot.
- Selected Queue: use this dropdown to select an agent from a different queue
- Agent : type a part of the email id of the agent you are looking for to filter the list of agents to narrow down to those who match your input

Select the agent by clicking on its row, and click on "Transfer" to transfer the chat to the selected agent. This will start the transfer process:

- An Invite will popup on the selected agent's screen (same as if he was assigned the chat by the system)
 - If the selected agent clicks on "Reject", the transfer will fail and the chat will remain with you. A message will be displayed to let you know that the transfer failed. You can make another attempt to transfer the chat to someone else.
 - If the selected agent clicks on "Accept", the system will try to transfer the chat to the selected agent:
 - the chat window will load on the selected agent side. The saved ticket will load as well inside the chat. Once the chat is fully loaded on the selected agent side, the chat will close on your side
 - in case a technical issue occurred in the transfer to the selected agent did not complete successfully, the chat will remain with you. A message will be displayed to let you know that the transfer failed. You can make another attempt to the same agent, or if the issue persists, to another agent.

6.10 Chat real-time translation

6.10.1 Concept

Depending on the configuration applied to your Chat environment by your system administrator, Real-time translation can be made available to let end users contact their IT Support in their own language.

In case Translation is enabled, this feature works in the following way:

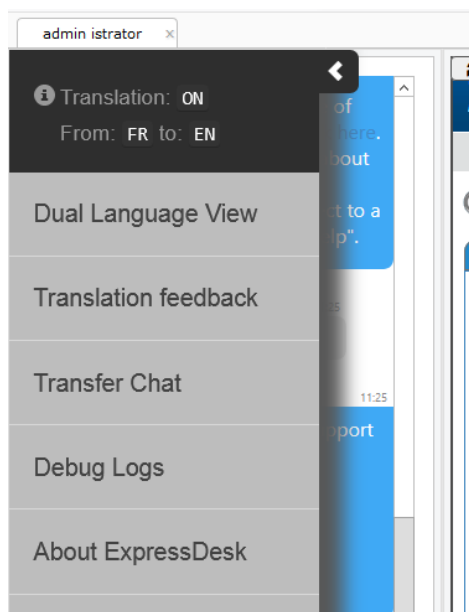
- The configurable Workflow that starts at every chat session is configured to retrieve the user's language (either by asking a configurable question to the end user, or by fetching the user's language in an external data source, or by analysing the user's first sentence and detecting the user's language automatically)
- Predefined Messages sent to the user by the Chatbot must be configured in all supported languages by the Chat administrator / Chat translators.
- In case a Natural-Language-Processing (NLP) engine is interface with the ExpressDesk chatbot (such as Google Dialogflow, IBM Watson, Microsoft Luis): end-user messages can be translated to English and forwarded to the NLP engine; the NLP engine's answer can be translated back to the user's language before being sent to the user
- In case the user asks to chat with a service desk agent, end-user input will be translated automatically to English before being sent to the service desk agent, and agent input will be translated from English to the user's language before being sent to the end user.

In case translation is activated in chat conversation, the Service Desk agents will see the "Translation : ON" indication and the source and destination languages in the sliding menu of the chat accessible using the "Cogs" icon in the upper left corner of the chat:



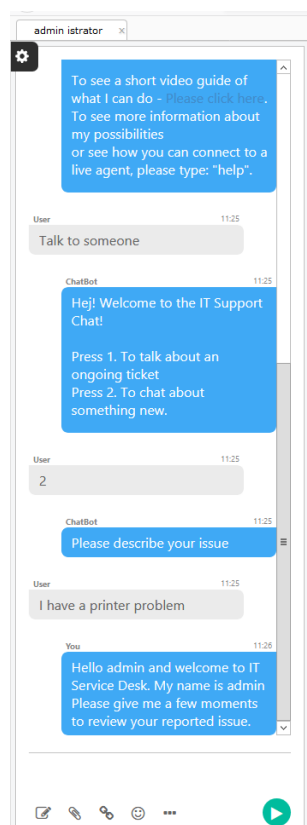
When the translation is activated (Translation: ON), dedicated entries will be displayed in the menu:

- Dual Language View / Single Language View (Toggle): switch between the Dual-Language or the Single—language views of the chat
- Translation feedback: provide feedback over bad/inaccurate translations



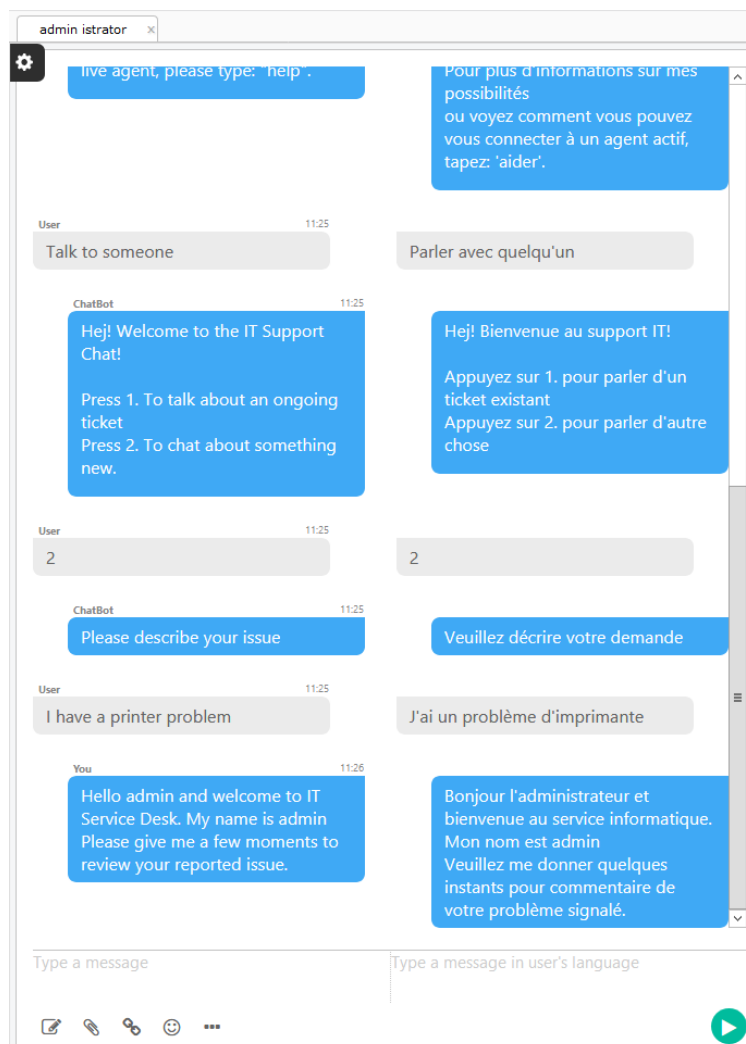
6.10.2 Single-Language view

The single-language view is the default view. It displays the chat in English only. There is a single input at the bottom of the chat for service desk agents to type their answers. Service desk agents are expected to type in English (mind the typos and make sure to write correct English to minimize the chances of bad translations).

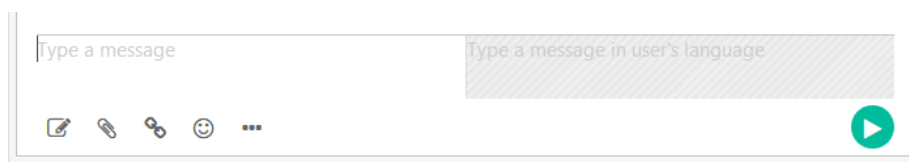



6.10.3 Dual-Language view

The Dual-language view is meant for service desk agents who have a fair understanding of the end-user's selected language. It displays the chat conversation both in English and in the end-user's original language. Each message is displayed twice on the same line: once in English (on the left) and once in the user's language (on the right):

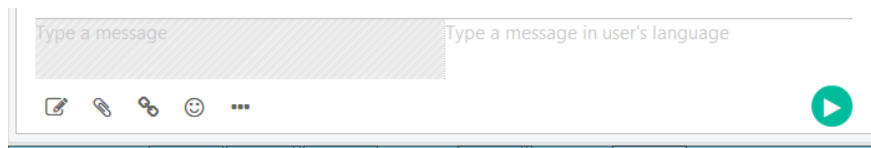



The bottom area where the service desk agents can type their messages is split into 2 sections:



- the left section (where "Type a message" appears) can be used to type messages in English. All other features work as normal. Messages written in this area will be translated to the end-user's language. When the agent sends the message (by pressing "Enter" or hitting the  button), A new line will appear in the chat transcript and the message that was typed will appear in the left area. The place where the translated message should show will first display a spinning wheel (while the

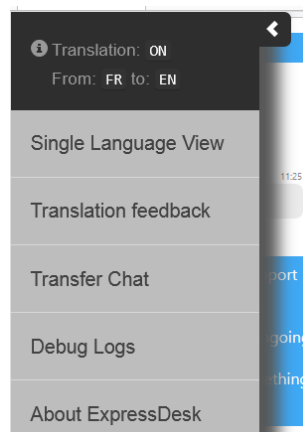
message is being translated). Once the message is translated, the translation will appear instead of the spinner. That translated message is sent to the user automatically and immediately.



- the right section (where "Type a message in user's language" appears) can be used to type messages in the end-user's language. Messages written in this area will be sent to the end-user immediately. In addition, the message will be translated to the English. When the agent sends the message (by pressing "Enter" or hitting the  button), a new line will appear in the chat transcript and the message that was typed will appear in the right area (where the transcript in end-user's language is displayed). The place where the English message should show will first display a spinning wheel (while the message is being translated). Once the message is translated, the translation will appear instead of the spinner. That translated message is NOT sent to the user, but will be saved in the chat transcript inside the Ticket.

Predefined messages are available in English only. When selecting a predefined message, it will appear inside the left section (dedicated to English) and will be translated automatically to the user's language upon sending the message.

To switch back to the Single-language view, the service desk agent can go back in the Chat menu and select "Single Language View":



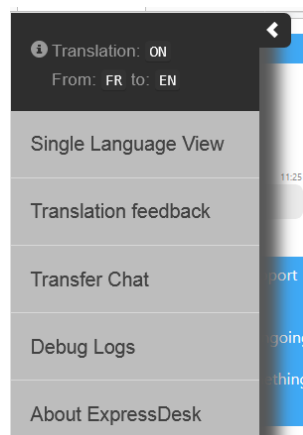
6.10.4 Provide translation feedback

The "Translation Feedback" feature is optional and can be activated/disabled by your system administrator. It requires a third-party integration with the translation engine that allows to process the feedback collected through this feature.

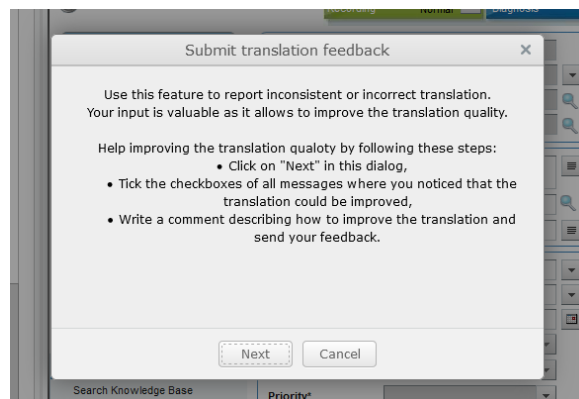
This section describes how Service Desk agents can use this feature in case it is available.

In case a service desk agent identifies an incorrect translation or a translation issue occurs, service desk agents can provide translation feedback to improve the quality of the translation. This feature is only available in a chat conversation where the translation is activated.

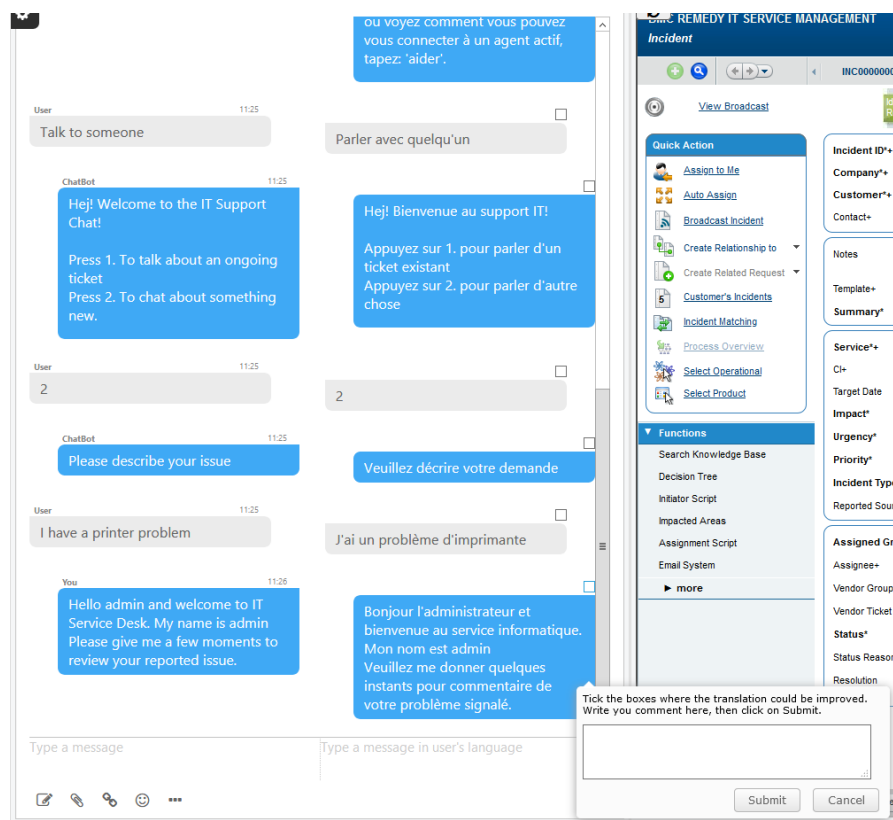
To provide translation feedback, open the chat menu of the chat where the translation issue occurred, and select "Translation Feedback" :



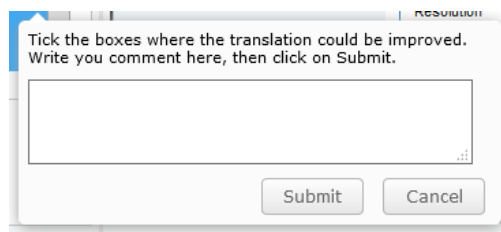
A dialog will popup to let you know the purpose of this feature:



Click on "Next". The Dual-language view will be displayed (in case the Single-Language view was previously active) and small checkboxes will appear on top of each message :



Tick the checkboxes of all messages where a translation issue happened. Then type your feedback message inside comment area and click on "Submit":



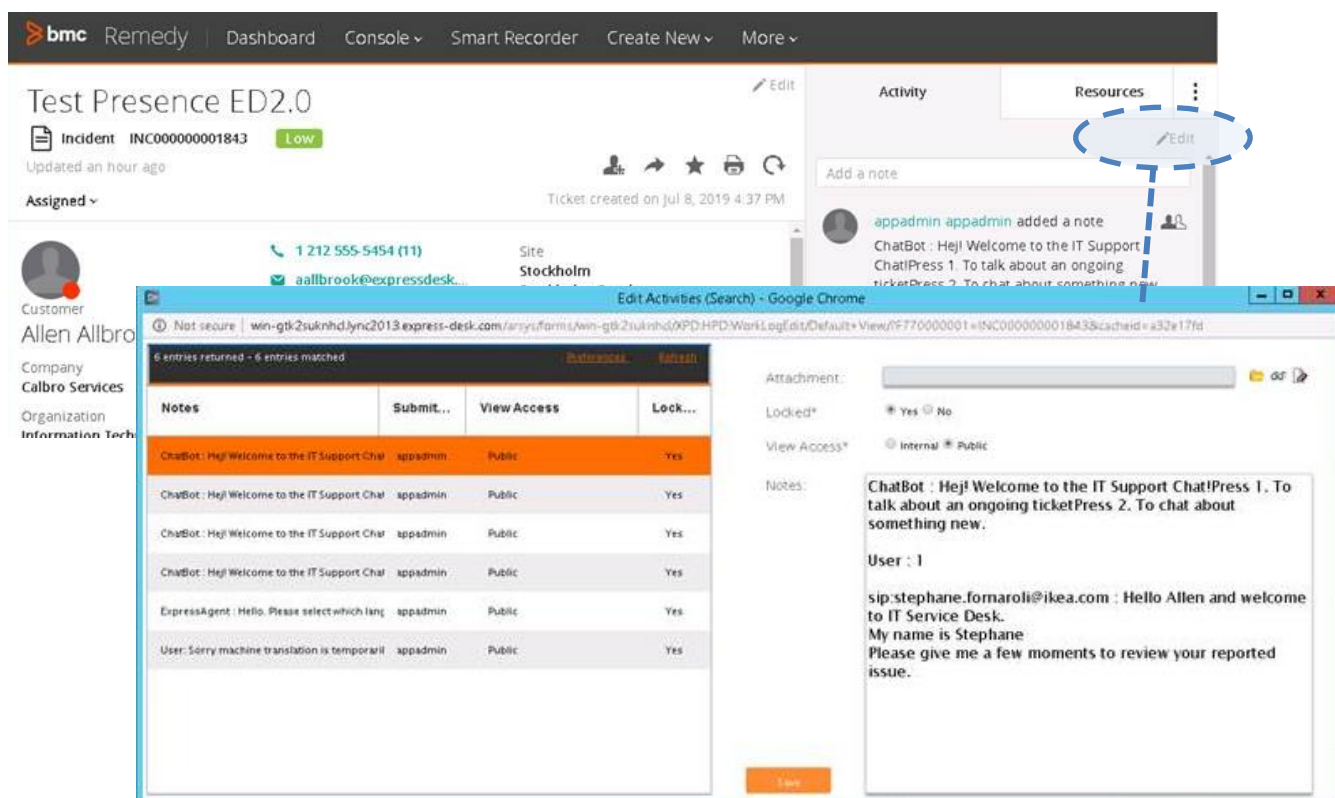
6.11 Update Chat transcript

Depending on the configuration applied by your system administrator, you might have the possibility to update chat transcripts after they are saved in Remedy.

Chat transcripts are saved:

- when you save an Incident inside of a chat window,
- when the conversation ends, by the time an Incident was loaded or created during the chat conversation.

Note: the following applies only to BMC Remedy SmartIT.



The screenshot shows the BMC Remedy SmartIT interface. The top navigation bar includes 'bmc Remedy', 'Dashboard', 'Console', 'Smart Recorder', 'Create New', and 'More'. The main content area displays an incident titled 'Test Presence ED2.0' with ID 'INC000000001843' and status 'Low'. It shows the incident was updated an hour ago and assigned to 'Allen Allbro'. A 'Resources' tab is active, showing a list of activities. A blue dashed circle highlights the 'Edit' button in the 'Resources' tab. Below the incident details, a table lists activities with columns for 'Notes', 'Submit...', 'View Access', and 'Lock...'. The table contains six entries, all with 'Public' access and 'Yes' lock status. The 'Notes' column contains chat transcripts from 'ChatBot' and 'User'. The 'Edit Activities (Search) - Google Chrome' window is open, showing the 'Edit' form for the selected activity. The form includes fields for 'Attachment', 'Locked*', 'View Access*', and 'Notes'. The 'Notes' field contains the chat transcript: 'ChatBot : Hej! Welcome to the IT Support Chat! Press 1. To talk about an ongoing ticket Press 2. To chat about something new. User : 1 sip.stephane.fomaroli@ikea.com : Hello Allen and welcome to IT Service Desk. My name is Stephane. Please give me a few moments to review your reported issue.'

The Chat transcript can be edited by updating the related Work Info log.

For SmartIT, there is no Out of the box feature to edit the Work Info logs, so ExpressDesk developed a custom feature, which is accessible only by accessing the incident via a Chat session or via the SmarterIT URL.

- Click on the "Edit" button located in the "Activity" tab
- Select the « Activity » item you want to update
- Modify the chat transcript
- Click on « Save »

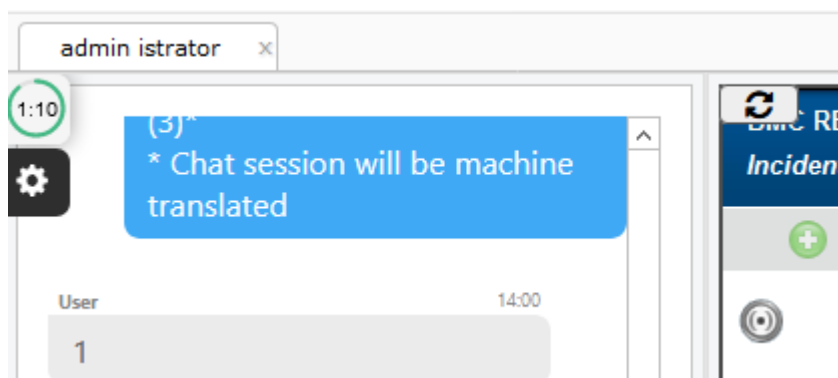
6.12 Working with multiple chats in parallel

When you work with multiple chats at the same time, all those chats will open in the same browser window, inside the same browser tab.

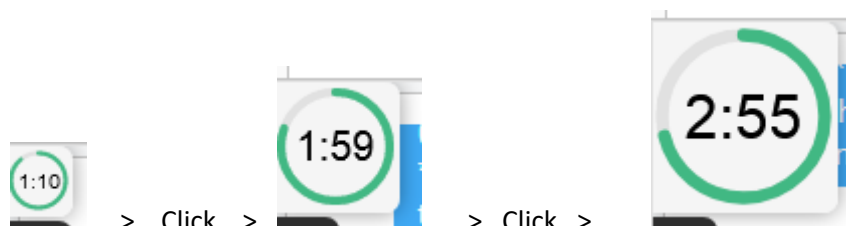
Inside the browser, each conversation will be represented by a different tab. In case you receive a message inside a conversation, while you are currently displaying another conversation, you will see the tab where you received a message blinking in orange. As soon as you click on that tab, it will stop blinking.

6.13 Chat Timer

Starting with ExpressDesk Middleware version 2.3.6, a timer that counts the time spent on each chat (a different value being displayed on each chat tab) can be enabled by the system administrator.



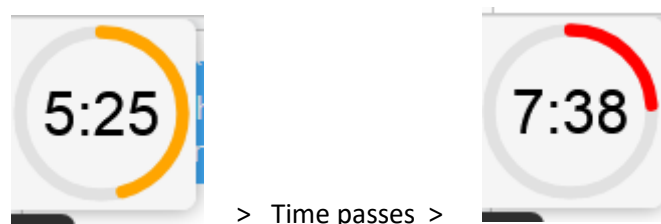
By clicking on the timer, you can change its size to medium or big, or back to small. Each click on the timer changes its size this way: small > medium > big > small > medium > big... etc :



The selected size will be saved from one session to another, so you prefer the medium size, you can just leave it at the end of a chat, and the next time you will receive a chat, the timer will be displayed in medium size (except if the agents clear their cookies or change the configured browser in the app options, in which case it will be reset to the small size)

The round surrounding the time represents an indicative countdown. The total duration represented by the round can be configured by the administrator.

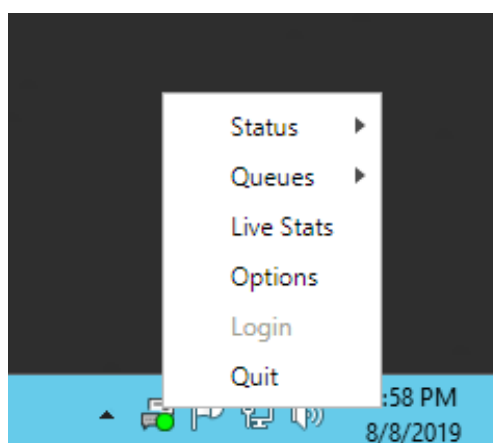
After a configurable duration, that round will turn orange, then red (The configuration that drives this is managed from ExpressReport – as a single setting that applies to all agents) :



When the conversation ends (i.e. the user left the chat or the inactivity timeout was reached) the countdown stops.

6.14 Display Live Stats and Queue details

Select "Live Stats" in the application menu :



The following window will be displayed :

Queues	#Agents	#Chats	#Waiting	Avg Wait	#Abandon	
All	7	0	0	00:00	0	

It shows:

- Queues: "All" or name of the queue
- #Agents : number of agents present
- #Chat : number of chats assigned to the queue and currently treated by agents
- #waiting: number of chats waiting in the queue
- Avg Wait: average waiting time of the chats in the queue
- # Abandon: number of chats abandoned in the queue for the last 15 minutes

Clicking on "All" expands the view to display the whole list of Queues (based on membership)

Queues	#Agents	#Chats	#Waiting	Avg Wait	#Abandon ✕
All	7	0	0	00:00	0
English-Other	1	0	0	00:00	0
English-Retail	1	0	0	00:00	0
Service Desk	1	0	0	00:00	0
US-English	1	0	0	00:00	0
SE-English	1	0	0	00:00	0
IN-English	1	0	0	00:00	0
Overflow-Queue	1	0	0	00:00	0

You can resize the width of this window. The height will adjust automatically to fit its contents.

Clicking on a row will display the details for the selected queue:

Queues	#Agents	#Chats	#Waiting	Avg Wait	#Abandon ✕
All	7	0	1	00:09	0
English-Other	1	0	0	00:00	0
English-Retail	1	0	0	00:00	0
Service Desk	1	0	0	00:00	0
US-English	1	0	0	00:00	0
SE-English	1	0	1	00:09	0

Customer	Status	Waiting	Pick
sip:mary@lync.local	Queued	00:07	<div>Pick</div>
IN-English	0	0	0
Overflow-Queue	0	0	0

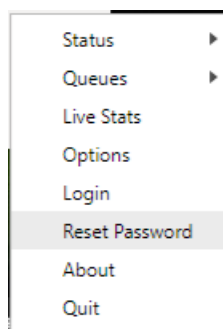
The Queue details will display:

- the list of Customers (waiting in the queue or assigned to an agent)
- the status of each conversation:
 - Queued: the conversation is waiting in the queue

- Transferred: the conversation is transferred to an agent
- TicketSaved: the agent save the ticket related to the conversation
- Waiting: shows for how long the customer has been waiting in the queue before his call was answered. For calls that are waiting in the queue, this duration is refreshed every 5 seconds
- Pick : this button is available only if a chat conversation is waiting in the queue. Clicking the button will assign the conversation to you, overriding your "maximum number of simultaneous sessions" setting. Keep in mind the fact that Internet explorer allows maximum 6 parallel sessions and that other browsers allow maximum 8. If you have already reached the maximum, using the "Pick" button will result in an error and the conversation with the customer will terminate.

6.15 Password Reset

Service Desk agents can reset their passwords using the "Reset Password" entry in the Presence&Notification app traybar menu:



Note: For this feature to work, you need to have the Chat server URL properly configured in the "Options". However, it is not required to be authenticated against the chat server.

The following dialog will popup:



Enter your email address (the one which you use to sign in to the application) and click on "Reset Password".

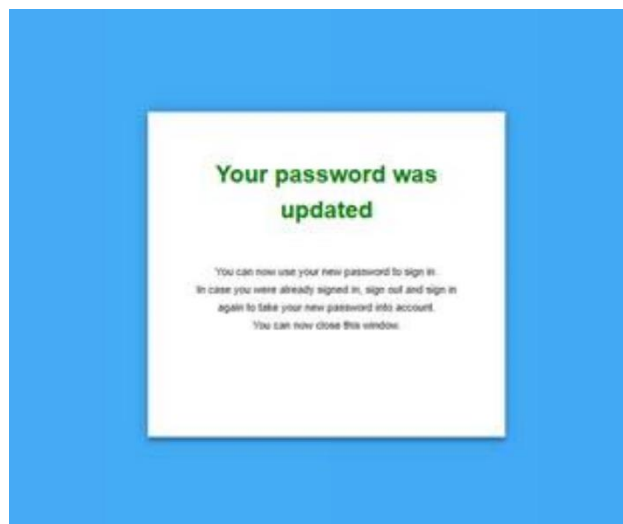
An email will be sent to your mailbox. If you do not receive the email, verify your Spam folder or contact your system administrator.

Once you receive the email, click on the hyperlink provided in that email. This will open the following page in your browser:



Enter your new password, and confirm it in the second field, then click on "Reset Password". The password complexity is managed by your system administrator, but it is generally recommended to have a password that contains minimum one upper case and one lower case letter, a number, and a special character.

A confirmation will be displayed after you have successfully updated your password:



You can close this browser window and use your new password to authenticate to the Presence&Notification app.

In case you were already authenticated while you changed your password, it is recommended to exit the app and reconnect with the new password.

6.16 Edit Predefined Messages

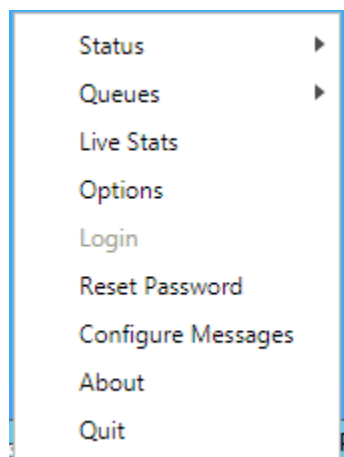
In version 2.2.20, a new feature was introduced to let Service Desk agents edit their own list of predefined messages.

Note: the latest ExpressDesk Middleware (version >= 2.2.20) is required and must have been released and configured by your system administrator for this feature to be available.

6.16.1 Open the Message editor

The Predefined message editor can be accessed from two ways:

- From the Service Desk agent App : open the menu by right-clicking the ExpressDesk icon from the traybar, and select "Configure Messages".

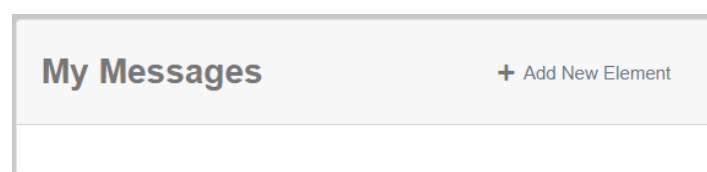


- From within an active chat: open the predefined messages drop-down menu and click on the "Edit" button.

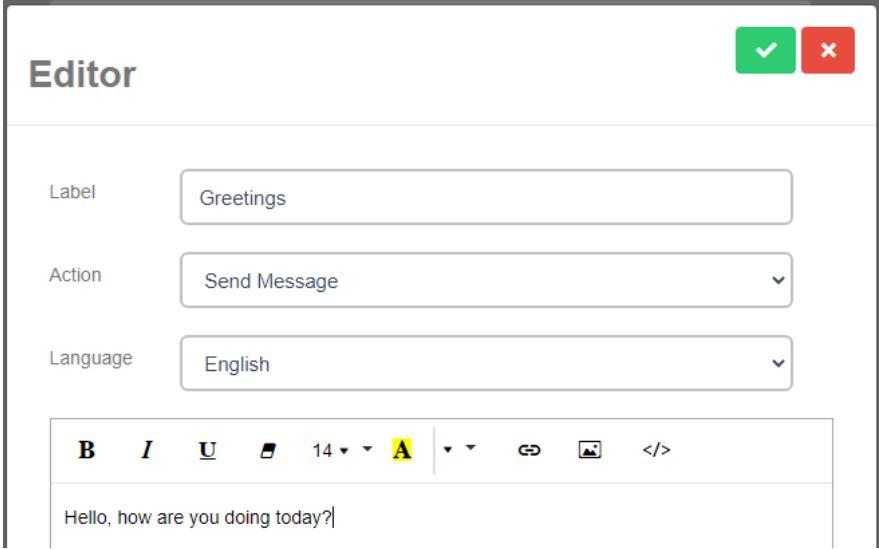
6.16.2 Add a new message



To add a new message:

- Click on the "Add New Element" button



- Enter the label you want to be displayed in your menu for this message. This label will only be visible to you and will not be sent to the user.




- Select the action to be performed at the moment you will select the message while being in a chat:
 - Send Message: Send the message immediately after selecting it
 - Insert Message inside text area: Insert the message inside the typing area, so that you can still update the message manually before sending it. To send the message while being in a chat, you'll then have to click the send button or hit the [enter] key.
 - No Action/Submenu label: see the section "Create a sub-menu" in the following pages of this guide.
- Select the language: The default language is English. This option allows you to specify custom messages in a specific language other than English. Such message would only become available in case you are in a chat with a non-English user, and you enabled the "Dual Language View" (see section "6.10.3 Dual-Language view" of this guide for more information about Dual Language View). The predefined messages menu would, in such case, display both English entries and entries matching the language of the end user.
 - In case you specified "Insert Message inside text area" as "Action", the message in a non-English language will appear inside the "User's language" typing area
- Click on the "V"  green icon to save your changes.
- In case you want to cancel, click on the "X"  red icon at any time

Note: In case Translations are not enabled on your system, make sure to select "English" language.


6.16.3 Remove a message

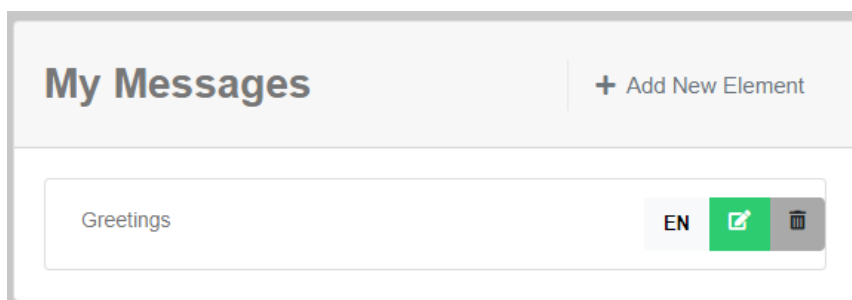
To remove a message:



- Click on the "bin" icon  of the corresponding message
- Click on "Delete" in the confirmation dialog

6.16.4 Modify an existing message

To edit an existing message:

- Click on the "edit" icon  of the message you want to modify

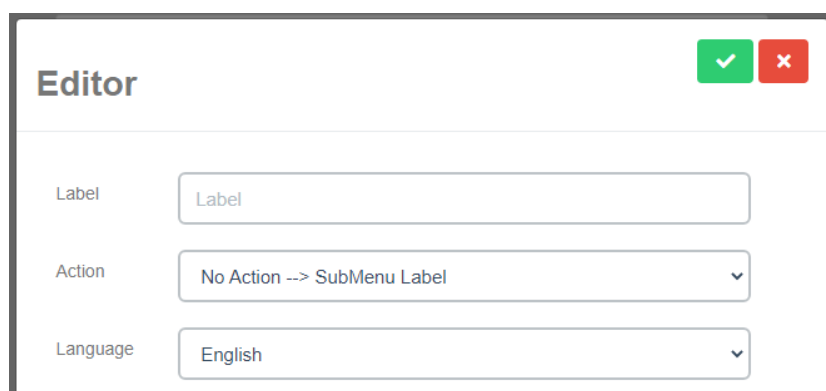




- The message editor will appear.
- Change the label or the message to your liking
- Click on the "V"  green icon to save your changes.
- In case you want to cancel, click on the "X"  red icon at any time

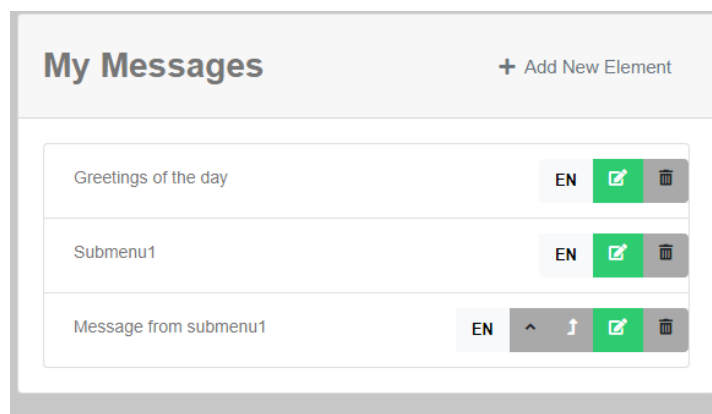
6.16.5 Create a sub-menu


You can create sub-menus in the Predefined messages drop-down to group several messages by theme. To create a sub-menu entry:

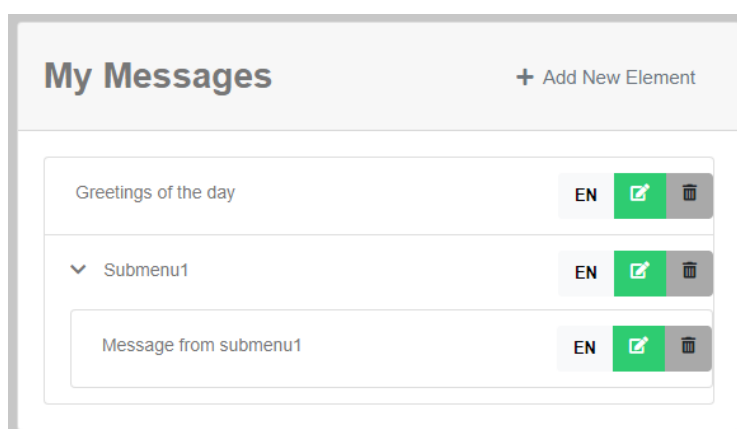
- Click on the "Add New Element" button, the same way you would create a new message entry
- Select "No Action / Submenu Label" as "Action". This will let the system know that this item is a submenu and not a message
- Select the language for which you want this submenu to be displayed. For more information about the logic related to languages, read the section "6.16.2 Add a new message" from this guide



- Click on the "V"  green icon to save your changes.
- The new submenu will appear inside your list of messages.
- Create the message you want to insert in that submenu item following the steps described in "6.16.2 Add a new message". Make sure that message matches the language you specified for your submenu.
- That message will appear as follows: notice the "indentation" icon: 



- Click on the "indentation" icon  to move the selected message inside the submenu
- This will result in the selected message appearing as an entry indented inside the Submenu:



6.17 Backward compatibility mode

Note: this section is valid only when ExpressDesk2.3 is used in combination with the legacy Remedy MidTier server. For users using SmartIT, please skip this part.

The new ExpressDesk2.3 solution comes with a backward compatibility mode. This mode is meant to accommodate organizations that have a "hybrid" environment: some users already migrated to Ms Teams, while other users still have to use Skype for Business.

When accessing Remedy directly, backward compatibility is triggered automatically in case both of the following conditions are met at the same time:

- you use Internet Explorer to access Remedy
- you have Silverlight installed

If you don't want to use the backward compatibility mode, you can either:

- stop using Internet Explorer, or,
- if you want to continue using Internet Explorer, you need to un-install Silverlight.

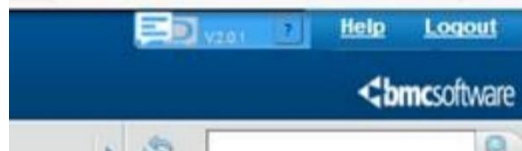
Note that Microsoft announced the end date of Silverlight support to be October 2021.

For inbound chats, you can use ExpressDesk2.3 while having the compatibility mode enabled.

The "old" chat bar in Remedy (below) is connected to your Skype client. It would be displayed only if you use Internet Explorer, and you have Silverlight installed.



- a. If you use another browser (Edge, Firefox, Chrome, ...) this will be displayed instead:



- b. If you use Internet Explorer, and you have Un-installed Silverlight, it will be displayed the same way as in Edge, Firefox and Chrome

2. The queues and login in/out in the Remedy window are still available if Internet Explorer is used, and Silverlight is installed.

It will NOT disappear automatically after installing the new app.

If Service Desk agents want to use Internet Explorer as their main browser and get rid of the "old" version, they should uninstall Silverlight.

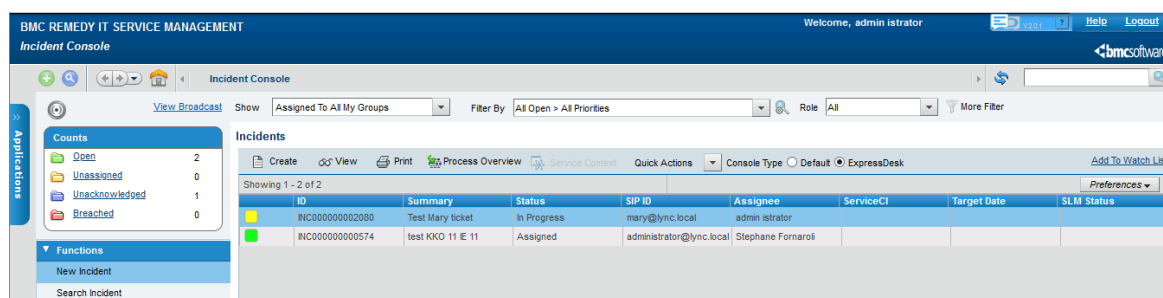
Alternatively, they can stop using Internet Explorer and use a modern browser like Edge, Chrome or Firefox instead.

6.18 Outbound Chat sessions

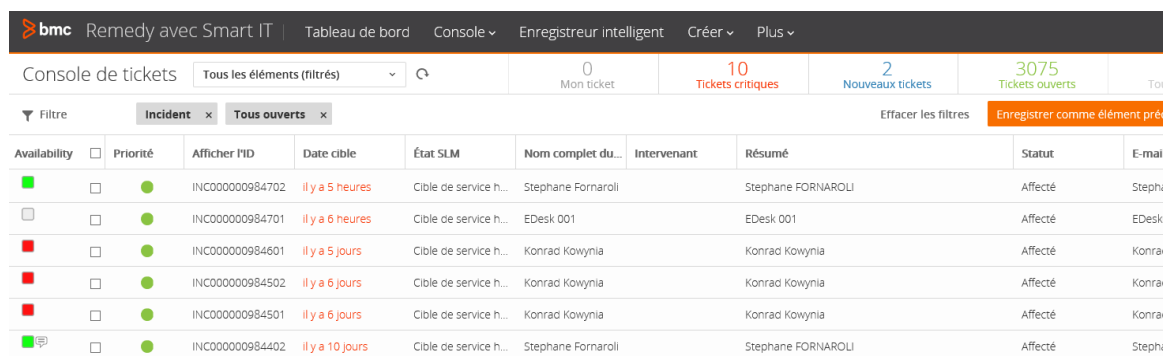
To start an outbound chat session with ExpressDesk2.3, you must be connected via the "ExpressDesk Presence And Notification App". If you don't want to receive incoming chats, change your status to "Offline".

Open the incident management console to view the presence of end users and to start an outbound chat. The fact that the presence of end users is displayed is helpful as this gives you the insight of who is currently available for a chat, in case you need to contact a user about a case, to request more information or to get confirmation that a case can be resolved.

If you use BMC Remedy MidTier, the Incident Console will display the presence of end users based on your permissions.



If you use Remedy SmartIT, you need to access SmartIT via the "com.expressdesk.smarterIT" application (accessible via the same URL as the SmartIT url, but replacing, "/apps/ui/SmartIT/#" by "com.expressdesk.smarterIT").



In both SmartIT as well as Remedy MidTier, click on the  icon to start an outbound chat session.

This will result in a new browser window appearing (the browser you selected in the "Configuration" section of this document), with a new chat session and the selected ticket appearing automatically in that window.

In case you use the "backward compatibility mode", the outbound chat will popup in Skype for Business (your Skype for Business client must be started prior to this). If you want to use Internet Explorer without the compatibility mode, uninstall Silverlight.

The end user presence is displayed in Remedy, based on the following principle:

- If the user is connected via Microsoft Teams, and is in 'teams only' mode, then the presence of the user via Teams is displayed
- If the user is in one of the 'mixed' modes, where the user can still use Skype for Business and Teams at the same time, then it is the presence of the user in Skype for Business that will be displayed
- If the user has only Skype for Business, or if the ExpressDesk TeamsConnector is not deployed yet in your organization, then the presence of end users is the Skype for Business presence

If you start an outbound chat:

- If the user is connected via Microsoft Teams, and has the "IT Support" chat app installed in his Teams client, then the system will start an outbound chat to the user in Teams.
- If the user does not have the "IT Support" chat app for Microsoft Teams, or if the ExpressDesk Teams TeamsConnector is not deployed in your organization, the conversation will be sent to the end user via Skype for Business

7 Frequently asked questions

- Agent can't see when "user" is typing when end user is using Microsoft Teams

This is due to limitations in the MsTeams API, which does not send us the typing indicator. We already contacted Microsoft about it but they answered it would NOT be implemented in their API in the near future.

However, when the agent is typing, the end user will see that, as the MsTeams API allows us to send the typing indicator.

In case the user is connected from Skype for Business, the typing indicator will be displayed to the service desk agent.

- Some smileys are not displayed the same way on both end user side and service desk agent side

We worked hard on implementing several features including smileys, however, not all smileys are implemented yet. We focused on the top most common smileys, and will gradually enrich the support for other smileys, but this is not considered as a priority feature. Thanks for your patience.

- Screen sharing and remote control are not available

These features were removed from ExpressDesk as Microsoft doesn't provide any API to access these features. We might implement these features in future releases, depending on Microsoft making the relevant APIs available.

- Voice and Video are not available

These features were removed from ExpressDesk as Microsoft doesn't provide any API to access these features. We might implement these features in future releases, depending on Microsoft making the relevant APIs available.

- When I am already in a chat conversation, and I receive another chat conversation, the new conversation appears as a new tab in the existing chat browser window

Yes, this is working as designed. The logic behind it is to offer the same kind of experience as what was possible in Skype for Business client, where you could have several tabs, one for each customer.