

SysAidTM

Chat Guide

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Introduction

SysAid allows administrators in the helpdesk to provide instant online support to end users via SysAid chat feature. The chat is fully integrated with your other SysAid modules, and you can improve your service level and add yet another channel of communication between administrators and end users by activating the SysAid chat.

The SysAid chat has many benefits, both for you as a helpdesk support team member, and for your end users:

- Immediate online communication available for your end users
- Ability to view the history of all the chats including the time for each message by the administrator and the end user- allows you to estimate the quality of the service provided by your helpdesk administrators and improve it.
- Initiate a chat with your end user with one click from within a Service request to assist him.
- Higher availability of the helpdesk for your end users- no need for phone calls, and full integration with the helpdesk- any chat can be connected to a service request.
- Ability to integrate the chat interface in your own website, simply by copying and pasting the provided code!
- Intuitive easy to use chat interface, both on the side of the end user and that of the administrator
- Create as many chat queues as you need, and conduct simultaneous chats with end users.

Quick Access to SysAid Chat

SysAid chat is an intuitive module. If you would rather try out the chat module yourself before reading further explanations, you can enjoy the benefits of this highly intuitive module, and experience it by yourself. Simply click the Chat option from the menu on the left. SysAid will open the chat console popup screen, where you can start activating this new helpful tool.

1. Choose Chat from the main SysAid menu



The chat popup screen will open. Check the Online box on the top left corner, to indicate you are available for chat.

In the **End User Portal**, your end users will be able to see the Live Chat icon that indicates an administrator is available for chat. Click the icon and start the chat - you will see the chat session in the console and can manage it from there.

Enable/Disable the SysAid Chat from the End User Portal.

To enable/disable SysAid chat, go to **Preferences** → **End User Portal settings**, and check the box:

'Enable chat from End User Portal'.

Click the **Save** button at the bottom of the page.

This will add a special icon for your end users in the end user portal, that allows them to open the chat with an administrator.

(By Default the chat is enabled)

2. End User Portal Settings page

The screenshot shows the SysAid web interface. The top navigation bar includes the SysAid logo, version 'v6.5.01', and user information 'Account: cmdb User: ariel'. A 'Preferences' dropdown menu is open, showing 'End User Portal' selected. The main content area is titled 'End user portal settings' and contains a 'General Settings' section. In this section, several checkboxes are visible: 'Enable end user portal', 'Enable Self Service', 'Enable End User to change settings', 'Allow end user to close service request...', 'When a Service Request is submitted from an asset...', 'When an end user adds a note or attachment...', 'Use CI instead of Asset', 'Enable Quick Lists', 'Allow end users to register themselves', and 'Enable chat from the End user portal'. The 'Enable chat from the End user portal' checkbox is highlighted with a green border. Below the checkboxes is a 'Save' button. A code block for embedding the self-service portal is also visible.

Edit the Chat Settings


Go to Preferences → Chat Settings

Here you can set the preferences for your chat queues. You can see a list of all your chat queues, and edit them by clicking the row entry of each queue. The default chat queue in SysAid is the Support chat, and it appears in your queues list.

3. Chat Queues List

The screenshot shows the SysAid web interface. The top navigation bar includes the SysAid logo, version v6.5.01, and user information (Account: cmdb, User: ariel). The left sidebar contains a menu with 'Chat Settings' highlighted. The main content area displays a table of chat queues with the following data:

#	Queue Name	Group	Time (in minutes) before the chat session becomes idle.	Time (in minutes) before chat session is closed by the system.	Allow leaving a message when the Chat is offline.	Display the details screen before the Chat starts.	Add timestamp in each chat session line.
1	Support		15	20	Yes	Yes	Yes
2	sales	None	15	20	Yes	Yes	Yes

You may add more queues according to your needs. For instance, you may find it useful to open a special chat queue for your sales department. To do so, click the **New**  icon. A form with the chat details is opened for editing. Fill in the name of the new queue, and which administrator group is responsible for this queue. If you choose 'None', then this queue will be available to all your administrators,

regardless of their group. If, however, you choose a certain group of administrators for this chat, for instance, your sales admin group, then only the administrators who belong to that group will be able to answer chat requests from this queue.

You can choose the images that will appear in your End User Portal when the chat is online and offline. As a default, two images are already provided, and if you do not change them, your end users will see one of these images in their portal, according to the current chat status. If you wish to replace these images, click the **Upload Image** button next to the image. SysAid opens a popup screen that allows you to browse your computer for the image you wish to upload. After you locate the image on your computer, click the **Upload** button in the popup screen. For the Support queue, which appears as a default in the End User Portal, SysAid specifies the recommended resolution for the image: 163*72 pixels. A different resolution may not fit the size of the End User Portal as well. However, for other queues, you may use any resolution, according to your preferences.

Use the **Restore Default** button if you wish to re-use the initial chat image provided as a default in SysAid.

4. Default Images for chat online and chat offline



Recommended resolution 163*72



Recommended resolution 163*72

Next, you may opt to add a time stamp to a chat session, by choosing 'Yes' from the dropdown menu. In the chats history, you will be able to see the exact time during which each of the responses by the two communicating sides in that chat took place. The time stamps will appear only on the side of the administrator, and will be saved in the chat history, so you will be able to see how long the administrator took in replying to each of the end user's questions.

You can copy the text from the script box, and embed it in the html code of your website, if you wish the chat to be available to your end users directly from your own website, and not just from the SysAid End User Portal.

Insert the time, in minutes, before the chat session becomes idle. The default in SysAid is that after 15 minutes, if neither the administrator nor the end user make any comment in the chat, the chat session becomes idle.

Insert also the time, in minutes, before the chat session is closed by the system. The default in SysAid is that after 15 minutes have passed without any activity in the chat session, the chat becomes idle. SysAid waits 5 more minutes, and then, if no more responses are made by either of the sides, the chat is automatically closed- after 20 minutes of inactivity.

Before SysAid closes the chat, a warning notification will appear, both in the administrator and in the end user interfaces.

You may choose to enable the end user to leave a message to the administrator when the chat is offline, and choose whether to display a screen with details about the chat session before the end user enters the chat.

Next, you can see five generic chat messages that can be automatically launched by SysAid in various occasions. You may edit these messages here, as they do not appear in the SysAid translation file.

The occasions for automatic chat messages are:


1. When a chat message is established.
2. When the chat was opened by the SysAid agent.
3. When the chat session is accepted.
4. When the administrator who is responsible for the chat leaves it, and another administrator is supposed to take over the chat.
5. There is also an automatic message for the case when the end user enters a message while the chat is in an offline mode.

If you do not wish any message to appear in any of these occasions, simply leave the text box empty for this message.

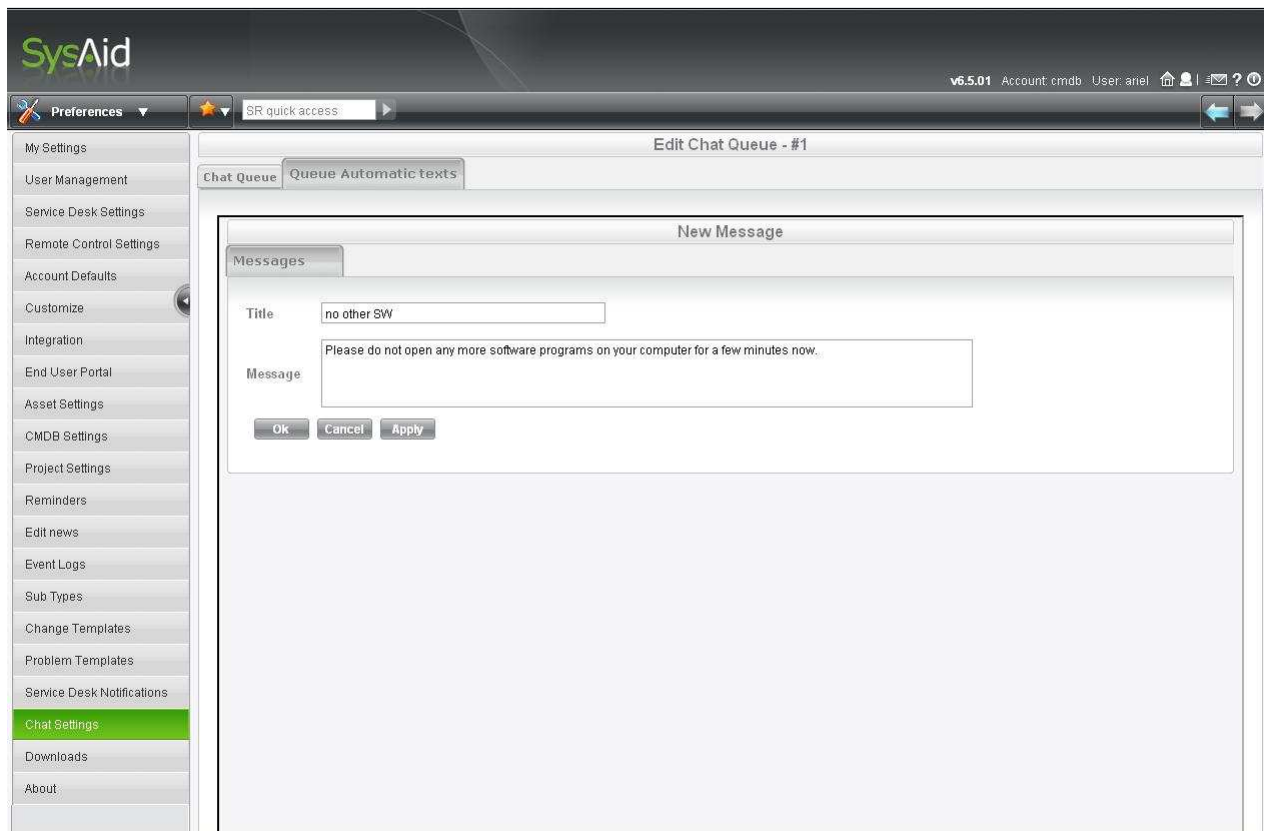
Click **OK/Apply** to save your chat settings.

Chat Automatic Texts

The next tab is under **Preferences** → **Chat Settings** → Choose a queue entry → **Queue Automatic Texts** tab. Here you can edit automatic texts that will appear at the bottom of the chat window while an administrator chats with an end user. The administrator will be able to drag the automatic text from the list at the bottom of the chat screen into the chat itself, and click to send the text to the end user. Thus, the automatic chat texts can save you time when chatting with your end users. An example for an automatic text that may be useful for many cases appears under the Queue Automatic texts tab ('Please wait...').

To edit a new automatic text, click the **New**  icon at the top of the screen. Insert a title for the new text, and enter the text itself in the message box. Click **OK/Apply** to save your new automatic text. Now you will be able to see it during chats, on the chat interface of the administrator. The administrator will be able to copy it into the chat pane when needed.

5. Edit Automatic Texts for the chat



Edit Chat Permissions

To be able to participate in a chat, the administrator needs to have the appropriate permissions. To set the permissions for any of your administrators, go to **Preferences** → **User Management** → **Admin Manager** tab, and click the name of the administrator you wish to set chat permissions for.


6. Chats permissions for an administrator

The screenshot shows the 'Edit administrator properties - ariel' window with the 'Permissions' tab selected. The 'Permission Type' is set to 'User Permissions'. The following permissions are listed:

- View Inventory, only in group [dropdown] and its sub groups
- Modify Inventory
- View Service Requests that are assigned to [dropdown: anyone]
- Modify Service Requests that are assigned to [dropdown: anyone]
- Purge Service Requests that are assigned to [dropdown: anyone]
- View projects that are assigned to [dropdown: anyone]
- Modify projects that are assigned to [dropdown: anyone]
- Purge projects that are assigned to [dropdown: anyone]
- View analyzer
- Remote Control
- Limit to its company data only
- SysAid administrator (SysAid Administrators automatically have all the permissions.)
- Manager: access to manager portal
- Change Manager (Create and design Changes / Problems)
- View other Admins' action items
- View CMDB
- Modify CMDB
- Access Chat Console
- Chat administrator

There are two check boxes for chats permissions: 'Access chat console' and 'Chat Administrator'. The permission to access the chat console enables the administrator to receive chat calls from end users and conduct chat sessions with them. Note that in case you have defined different chat queues for different administrator groups, the chat administrator will be able to participate only in the chats directed to his or her group. If the access to the chat console is unchecked, the chat options will not appear in the SysAid menus of this administrator.

The permission of a chat administrator, on the other hand, is given to specific administrators who can view chats conducted by other administrators in all the queues, and to release a chat from another administrator. This enables the chat administrator to monitor the quality of the service provided through chats by other administrators, and improve the service by snatching a chat from another administrator, when necessary.

Under **Preferences** → **User Management** → **Admin Manager** → click a row entry of a certain administrator, you can add a special nickname for chats, that will be visible for end users who chat with this administrator. To add a nickname click the customize icon , and in the popup screen that opens shift the 'Chat Nickname' filed from the available to the visible columns, by using the arrow pointing to the right. Click Save, and add the nickname in the administrator general details page. Each administrator can add a chat nickname for him/herself under **Preferences** → **My settings**.

Chat Sessions History

Under **Service desk** → **Chat Sessions** you can see a list of all the chats that have been made in the SysAid chat system, except the chats that are still open at that very moment. Click any of the entries to see the details of that chat session.

7. Chat Details under Service desk → Chat Sessions

The screenshot shows the SysAid interface for a closed chat session. The left sidebar contains a navigation menu with 'Chat sessions' highlighted. The main content area is titled 'closed chat details - #6' and contains a 'Closed Chat' tab. The chat history text box shows the following messages:

```

Please wait, a support representative will join shortly.
[02:53:41]
John : Hi, this is john
[02:54:46]
Support representative has joined this chat session.
[02:54:50]
Operator: Hi John, how may I help you?
[02:55:04]
This chat session has been identified as inactive, it will soon be
closed automatically.
[10:10:27]
This chat session has been closed by the system.
[10:15:27]
  
```

Below the chat history, the following metadata is displayed:

Request user	John Smith Change
Email address	JoneSmith@sysaid.com
Start time	20-10-2009 02:53
Close time	20-10-2009 03:15
Queue	Support
Assigned user	ariel
Full name	John Smith


Here you can see a text box that includes all the interactions between the administrators and the end users.

You can see the name of the user who requested the chat. To change the name of the request user, click the **Change** button and choose from the popup screen the name of the user who initiated the chat. The email address of the end user who participated in the chat is shown, and cannot be changed in this page.

You can also view the exact time when the end user or the administrator initiated the chat, the time when the chat was closed.

More details that appear here are the queue the chat belongs to, the name of the assigned user, and the name of the administrator who replied to the chat.

The status of the chat indicates whether it was closed by the end user or by the system. The update time shows you when the last changes in the chats were made. You can see the service request that is related to the chat, or attach a request if there is not any, by clicking the **Change SR** button. A popup screen opens, allowing you to select the related service request from your helpdesk list. Once you have completed editing the chat record, click the **OK/Apply** button to save your changes.


The chat administrator can also delete historical chats, by highlighting the chat you wish to delete, and then clicking the Delete  icon.

You can access the closed chats screen from two other places in SysAid:

Under **Preferences** → **User Management** → **End User** → Select an end user entry → **Chats** tab, you can see the closed chats of that particular end user.

Also, under **Service Desk** → **Incidents** → Select an incident → **Chats** tab, you can see all the closed chats that are related to that specific service request.

Conducting a Chat as an Administrator

As an administrator with chat permissions, you may start a chat with an end user, by choosing from the main left menu in SysAid the **Chat** option. 

Another option is to initiate a chat regarding a specific service request. Go to **Service Desk** → **All** → and click the entry of the relevant request.

Within the request, you will see a link that allows you to open a chat session with the end user who sent the service request.

8. Open chat from within a service request





Once you open the chat, you will see the chat console in a popup screen. Check the 'Online' box at the top left corner, to indicate to the end users that you are available for chats.

In the next dropdown menu, choose your relevant chat queue. You will see in the dropdown lists only the names of the queues you are permitted to participate in. If you check the 'Effect' box, you will be able to hear a sound that signifies that a new incoming chat session is waiting for you.



9. Select your chat queues, effects, or see only your own chats

The 'Show Mine' check box allows you to see in the box on the top left of the chat console only the chat sessions that you are participating in, and the chat sessions that are still waiting in the queue. By un-checking this box you can view all the active and waiting chats in your queue. When a new chat is waiting in your queue, you will see it in the upper table on the right of the console. A blinking icon of a bell will appear next to the new chat call. You will be able to accept the chat call by clicking the **Accept** button. After accepting the chat, in case you wish another administrator from your queue to take over the chat, click the **Release** button next to this chat line.

10. Accept/Release chat button

In the bottom left of the chat console screen you can see your five last closed chats. The details of the closed chats appear in this table: the name of the queue, the time in which the chat begun and ended, the name of the end user and the administrator who participated in the chat, and the related service request, if there is any. The icon on the right represents the status of the closed chats. The status of the chat can be either green , which means the chat was closed by the end user, or red , in case the chat was closed by the system.

11. Your recent chats

Queue	Start time	End time	End user	Admin	SR#	Status
Support	19/10/09 13:31:00	19/10/09 13:51:02	John Smi...			
Support	19/10/09 13:28:20	19/10/09 13:54:02	John Smi...	ariel		
Support	14/10/09 10:19:01	14/10/09 10:19:01	End user...	SysAid		

Beneath the list of recent chats there are two buttons:

Full List - opens a new tab in your browser, with the full list of the closed chats that took place in your helpdesk.

Initiate Chat with an End User - Allows you to open a new chat session with an end user, from the chat console.

In the middle of the chat console screen you can see two panes. The upper pane shows you the full text of you chat session. The text inserted by the end user appears in gray, while the text the administrator -you - inserted appears in green.

To insert your text, type it in the lower pane, and click the **Send** button, or the **Enter** key. The text you have entered will disappear from the lower pane and appear in the upper pane once you click enter. The end user will be able to see it only then.

If you wish to use one of the automatic texts that appear in the right bottom corner for your chat highlight it and use the arrow to add it to your conversation.

12. Add automatic text to your chat



On the right top of the chat console you can see the details of the name, the email address and the company of the end user you are chatting with. You can also see the administrator details: the name of the support representative who accepted the chat call, and the chat queue name. To change the name of the end user, click the **Change** button and select from the list in the popup screen the name of the end user you are chatting with. If you are a chat administrator, you can also move the chat to another queue or to assign it to a different administrator, by using the dropdown menus on the top right of the chat console.

In case during the chat session you wish to connect the chat to a specific service request, use the **Change** button on the right of the chat console, and select from the list in the popup screen the name of the relevant service request.

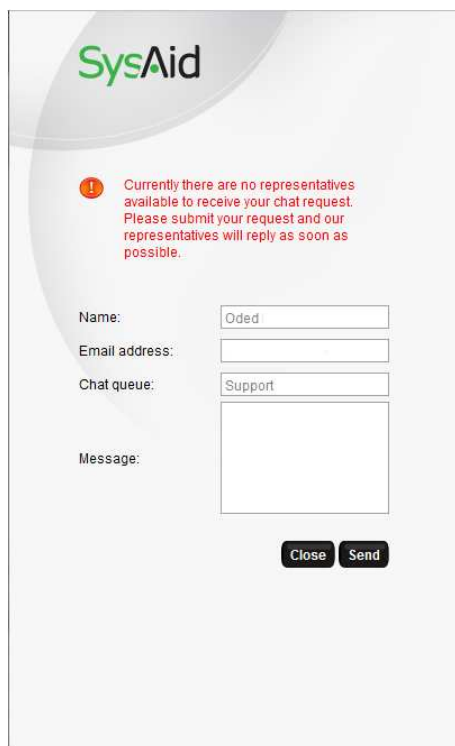
If you wish to open a new service request that is based on the chat, click the **New** button. SysAid will open a popup screen that allows you to fill in the details of the new service request.

SysAid also shows the IP address of the asset of the end user you are chatting with.

Conducting a Chat as an End User

From the end user portal, you can easily ask for a chat with a support representative, by clicking the chat image at the top left of the screen, when the chat is enabled. In case there is no available helpdesk support team member for chat, the image will suggest the end user to leave a message. Clicking the offline image will enable the end user to leave a message to the support team

13. Support Offline- Leaving a Message Screen



The screenshot shows a SysAid popup window with the following elements:

- SysAid** logo at the top left.
- A red warning icon and text: "Currently there are no representatives available to receive your chat request. Please submit your request and our representatives will reply as soon as possible."
- Form fields for:
 - Name:
 - Email address:
 - Chat queue:
 - Message:
- Buttons for "Close" and "Send" at the bottom.

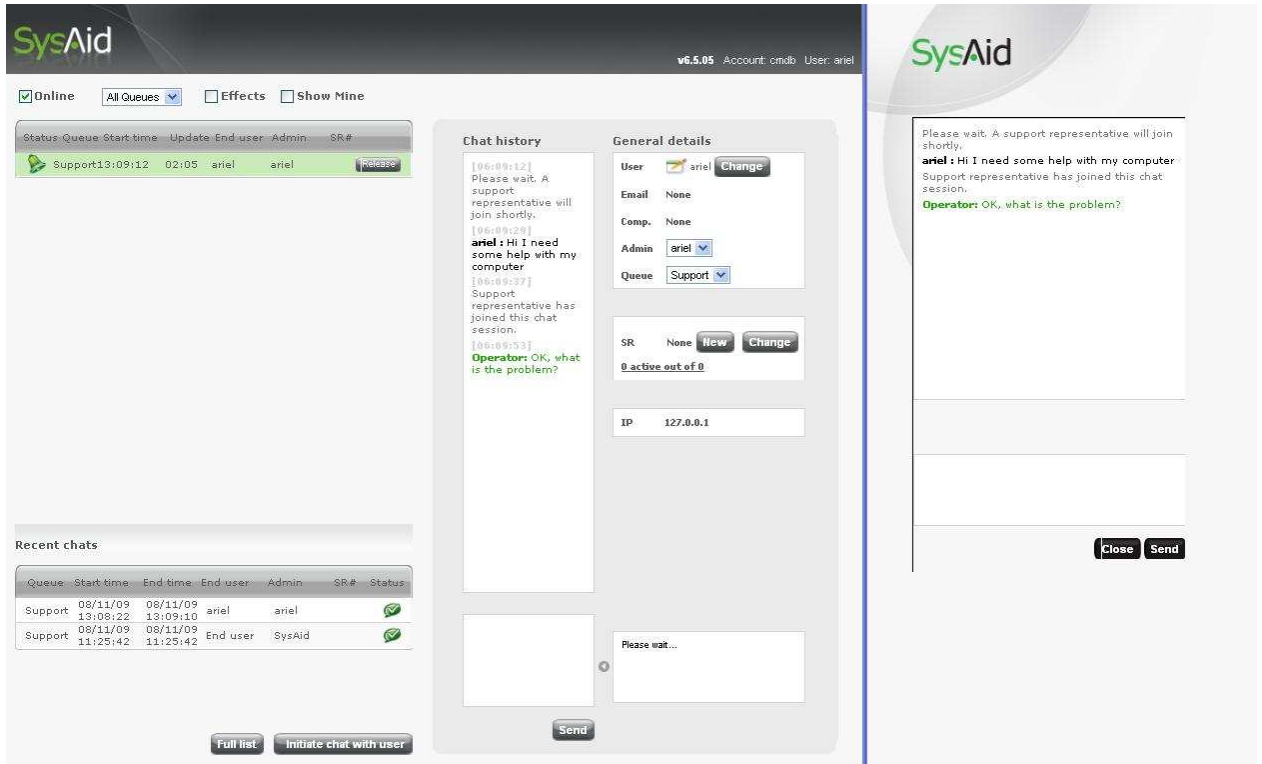
When a support team representative is available for chat, clicking the online image will open a popup screen where the end user can add the ID number of the service request which is related to the chat, if such a service request exists. The end user will click the **Start** button at the bottom of the popup screen in order to begin.

14. End User Starts a Chat Session

The screenshot displays the SysAid Help Desk interface. At the top, the SysAid logo is on the left, and the version 'v6.5.05' and user information 'Account: cmda - User: ariel' are on the right. Below the header, a 'Live Chat with a rep' button is visible. The main content area features a 'Welcome to the SysAid Help Desk!' message and three service options: 'Submit a Service Request', 'Self Service', and 'Change request actions'. A central browser window titled 'Chat welcome page - Mozilla Firefox' is open, showing a form with the following fields: Name (ariel), Email address, Chat queue (Support), and Service request. The form includes 'Close' and 'Start' buttons. The SysAid logo and 'Help Desk software' text are visible in the bottom right corner of the browser window.

Once the chat session begins, the end user will be able to type his or her question in the lower box of the chat popup screen, and then click the Send button. The text will appear in the upper box, where the end user will also be able to see the reply of the administrator.

15. Chat session - Administrator vs. End User screens



The end user can close the chat session at any time, simply by clicking the **Close** button at the bottom of the chat popup screen. A chat closed by the end user will be marked green - Closed by the user status - in the Administrator chat console.