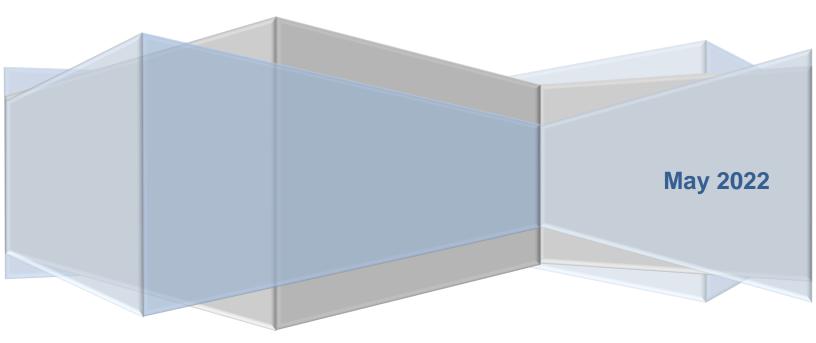


Chime for Teams Azure and Office 365 Prerequisites for Hosted Environments



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OVERVIEW

This document is intended to provide both a high level, as well as technical requirements required to install and configure an Instant Chime for Microsoft Teams application server.

This document covers a scenario where Chime will be installed and managed by a third-party hosting provider (possibly Instant) and items such as configuring Azure AD, AD Authentication, and Application permissions will be important. These areas are also relevant to self-hosted modes.

For more information on installation and architecture visit our Install and Getting Started page.

At a high level, Chime for Teams will need to be configured to securely communicate with several external services as well as access the following resources:

- Microsoft Azure AD
- Microsoft Office 365 Graph APIs
- Microsoft Bot Framework

IMPORTANT ROLES:

As part of this installation and configuration process, a tenant administrator for the Microsoft Office 365 tenant may need to perform several actions in order to provide the necessary authorization for the Chime server.

Certificate requestor (if your organization is self-hosting)

Administrator for O365 domain

CONFIGURING AZURE AD AUTHENTICATION FOR CHIME FOR TEAMS

Chime for Microsoft Teams requires the configuration of an Azure Active Directory application in order to allow Chime to leverage Office 365 for user authentication, and to communicate with your Microsoft Teams users. This document will outline how to configure these two applications.

PREREQUISITES

- A. You must have an Office365 tenant for your organization.
- B. You must be an administrator of your Office 365 domain.
- C. An Azure account linked with your Office 365 Identity. If this is not done, see <u>https://technet.microsoft.com/en-us/library/dn832618.aspx</u>.

All configuration steps in this guide take place in the Azure Active Directory component of the Azure portal.

- 1. Sign into the Azure AD portal (<u>https://portal.azure.com</u>).
- 2. Select the Azure Active Directory in the left-hand navigation pane.

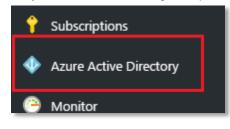


Figure 1: Begin Setting up Active Directory

3. If the **Azure Active Directory** is not available on the left-hand navigation pane, it is available in **All services** then the section labeled **Identity**

Create a resource	All services Filter	By category ~	
E All services	IDENTITY (13)		
- 🖈 FAVORITES	Azure Active Directory	*	Azure AD B2C
🔲 Dashboard	Azure Information Protection	*	🗳 Groups
All resources	🍫 Azure AD Connect Health	*	Azure AD Cloud App Discovery
📦 Resource groups	🔗 Azure AD Identity Protection	*	Enterprise applications
📀 App Services	Access reviews	*	

Figure 2: Secondary Option to Active Directory Setup

CONFIGURE ACTIVE DIRECTORY AUTHENTICATION

RETRIEVE YOUR AZURE TENANT ID

11 Properties

1. Select

- in the navigation pane in the **Azure Active Directory** blade.
- Copy the **Directory ID** from the field, and save it somewhere convenient. You will need this value when configuring Chime. **Note**: The Directory ID is often referred to as the "Tenant ID" in Microsoft documentation, both terms are referring to this ID.

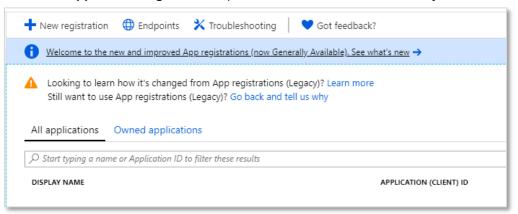
* Name
Your Company
Country or region
United States
Datacenter region
United States
Notification language
English 🗸
Directory ID
someguidvaluehere

Figure 3: Copy Directory ID

CREATE APPLICATION 1. Select **App Registrations** in the new navigation pane within the **Azure Active Directory** blade.



2. Click the New application registration option in the Azure Active Directory blade.





REGISTER THE CHIME APPLICATION

- 1. Create a name for this application (Chime is a suitable name)
- 2. Select Accounts in any organizational directory (Any Azure AD directory Multitenant) as the Supported account types to allow for us to host.
- 3. Enter the URL for the server that Chime will be hosted on, with the /Chime route in the URL (ex: https://yourserver.domain.com/Chime)

NOTE: Be sure that the /Chime is included in the URL, this will automatically configure the Reply URL to correctly work with the Chime application

Dashboard > instant technologies - App registrations > Register an application
Register an application
* Name
The user-facing display name for this application (this can be changed later).
CHime 🗸
Supported account types
Who can use this application or access this API?
 Accounts in this organizational directory only (instant technologies)
Accounts in any organizational directory
Accounts in any organizational directory and personal Microsoft accounts (e.g. Skype, Xbox, Outlook.com)
Help me choose
Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.
Web V https://yourwebserver.domain.com/chime V

Figure 5: Create the Chime Web App / API

4. Click the

button in the bottom of the Register an Application blade.

CONFIGURE THE APPLICATION

Register

- 1. Click on the newly created application in the **App Registrations** blade. If you have many applications, you may need to search for it.
- 2. In the Overview window, you will be able to record the **Application ID**. This value will be used when configuring Chime. This page also will allow you to record the Directory (tenant) ID if you were unable to in the previously.

CONFIGURE APPLICATION PERMISSIONS

Chime requires the following Microsoft Graph API permissions to be granted for full functionality:

Permission	Туре	Usage
User.Read	Delegated	Signing in users to the Chime web portal
User.Read.All	Application	Retrieve metadata information about users contacting a queue.
Directory.Read.All	Application	Perform user and group searches when adding users to Chime and for alert recipients
Group.Read.All	Application	Allows Chime to search for Microsoft Teams Teams and retrieve information about their properties and user membership
Group.ReadWrite.All	Application	OPTIONAL - Allows Chime to add or remove users from Teams Team rosters to match the queue membership in Chime
Presence.Read.All	Delegated	Allows Chime to retrieve presence information for users assigned to a queue. REQUIRED for hunt-style chat routing
AppCatalog.ReadWrite.All	Delegated	OPTIONAL - Allows Chime to programmatically upload generated Teams App packages for a queue to the tenant App Catalog. Without this permission, it is necessary for an administrator to manually upload Teams App packages for the queues.
TeamsApp.ReadWrite.All	Delegated	OPTIONAL - Allows Chime to programmatically assign generated Teams App packages to the Team associated with a queue Without this permission, it is necessary for an administrator to manually add the Team App for a queue's bot dispatcher to the Team associated with the queue

1. Click the API Permissions button.

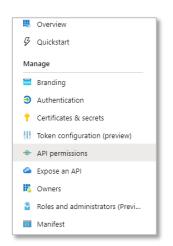


Figure 6: Access Required API Permissions

2. Click the Add a Permission button in the API Permissions window.



Figure 7: Manage Required Permissions

3. Select Microsoft Graph from the list of Microsoft API's listed.

APIs my organization	uses My APIs	
,		-
Microsoft Graph Take advantage of the tremendous amount Security, and Windows 10. Access Azure AD, OneNote, SharePoint, Planner, and more thr	Excel, Intune, Outlook/Exchange, OneDrive,	
Azure Data Explorer	Azure Key Vault	Azure Rights Management
Perform ad-hoc queries on terabytes of data to build near real-time and complex analytics solutions	Manage your key vaults as well as the keys, secrets, and certificates within your Key Vaults	Allow validated users to read and write protected content
Azure Service Management	Data Export Service for Microsoft Dynamics 365	م Dynamics 365 Business Central
Programmatic access to much of the functionality available through the Azure portal	Export data from Microsoft Dynamics CRM organization to an external destination	Programmatic access to data and functionality in Dynamics 365 Business Central
Dynamics CRM	Flow Service	📻 Intune
Access the capabilities of CRM business software and ERP systems	Embed flow templates and manage flows	Programmatic access to Intune data
Office 365 Management APIs	OneNote	Power BI Service
Retrieve information about user, admin, system, and policy actions and events from Office 365 and Azure AD activity	Create and manage notes, lists, pictures, files, and more in OneNote notebooks	Programmatic access to Dashboard resources such as Datasets. Tables, and Rows in Power Bl

Figure 8: Configure Required Permissions

- 4. Select Application permissions.
- 5. Use the search bar to find and add the following required permissions
 - a. Directory.Read.All
 - b. Group.Read.All
 - c. Group.ReadWrite.All
 - d. User.Read.All
- 6. Once all of the above permissions are selected, click the **Add Permissions** button.

▼ Directory (1)				
Directory.Read.All Read directory data 💿	Yes			
Directory.ReadWrite.All Read and write directory data 💿	Yes			
▶ Domain				
EduAdministration				
▶ EduAssignments				
▶ EduRoster				
▶ Files				
▼ Group (1)				
Group.Read.All Read all groups 👦	Yes			
Group.ReadWrite.All Read and write all groups 👧	Yes			

Figure 9: Select Permissions for Graph Api

- 7. Click the Add a Permission button again.
- 8. Select Azure Active Directory Graph. This might be at the bottom of the list.
- 9. Select Delegated permissions.
- 10. Use the search bar to find and add the following required permissions:
 - a. User.Read
 - b. Presence.Read.All
 - c. AppCatalog.ReadWrite.All
 - d. TeamsApp.ReadWrite.All

User (1)	
\checkmark	User.Read Sign in and read user profile 👩	-
	User.Read.All Read all users' full profiles 🕕	Ves
	User.ReadBasic.All Read all users' basic profiles 👔	-

Figure 10: Select Permissions for Delegated Permissions

11. Finally, it is necessary to grant administrator consent for these permissions. Click the Grant admin consent button

🕐 Refresh					
You are adding permis previously.	sion(s) to your	application, users will ha	ve to consent (even if they've already done so	
	ed to call APIs of configured p sions and cons	permissions should incl	ude all the pe	by users/admins as part of the ermissions the application nee	
		e damme consent for m	stant reenito	R	
API / Permissio	Туре	Description	Admin C	Status	
✓Microsoft Graph					•••
AppCatalog.R	Delegated	Read and write to a	Yes	🛕 Not granted for Instant	•••
Directory.Rea	Application	Read directory data	Yes	🛕 Not granted for Instant	•••
Group.Read.A	Application	Read all groups	Yes	🛕 Not granted for Instant	•••
Group.ReadW	Application	Read and write all	Yes	🛕 Not granted for Instant	•••
Presence.Rea	Delegated	Read presence info	Yes	🛕 Not granted for Instant	•••
TeamsApp.Re	Delegated	Manage user's Tea	-		•••
User.Read	Delegated	Sign in and read us	-		•••
User.Read.All	Application	Read all users' full	Yes	🛕 Not granted for Instant	•••

Figure 11: Grant Admin Consent

ADD REDIRECT URIS

1. To add Redirect URLs click the Authentication button.

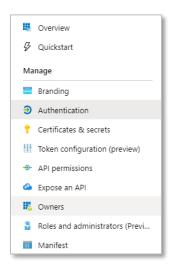


Figure 12: Configure Reply URLs

 Under the Web section there is an area to add in Redirect URIs. There should be 1 Redirect URI saved in there already, it will look something like this: <u>https://[yourwebserver].domain.com/chime</u> (If there is not a URI there with this format, one should be added before proceeding to the next step)

Redirect URIs	
The URIs we will accept as destinations when returning authentication responses (tokens) after successfully authenticating users. Also referred as reply U more about redirect URIs and the restrictions	RLs. Learn
https://[yourwebserver].domain.com/chime/?a	1
https://[yourwebserver].domain.com/chime	l İ
Add URI	
Logout URL	
This is where we send a request to have the application clear the user's session data. This is required for single sign-out to work correctly.	
e.g. https://myapp.com/logout	~
Implicit grant	
Allows an application to request a token directly from the authorization endpoint. Learn more about the implicit grant flow	
To enable the implicit grant flow, select the tokens you would like to be issued by the authorization endpoint:	
Access tokens	
V ID tokens	

Figure 13: Configure Reply URLs

- 3. In the text box below, add in a URI with this format: <u>https://[yourwebserver].domain.com/chime/?a</u>
- 4. Further down, under the Implicit grant section, select **ID tokens**. If you do not select this users will not be able to authenticate into Chime.
- 5. Click the **Save** button.

CREATING BOTS FOR CHIME DISPATCHERS

This must be done after completing the Chime installation.

Each Chime queue will need at least one dispatcher bot endpoint created for users to access seeking help, and to route those requests to an agent. Each bot that is supplied for a queue will allow agents to handle one concurrent chat - i.e. for agents to be able to handle two chats from users at the same time, two bots must be created for the queue.

You must be an administrator for your Microsoft Azure subscription to complete these steps.

ADDING A DISPATCHER

In order to create queues, route chats to agents, and send out alerts; Chime needs Azure Bot Resource created in Microsoft Azure that will be able to broker chats to agents and guests. Each queue you create needs a dispatcher and the Azure Bot will act as the dispatcher.

CREATING A DISPATCHER RESOURCE

To create a Dispatcher for Chime you will need permissions to create resources in your organization's Microsoft Azure Subscription.

1. Navigate to the Azure Portal, at <u>https://portal.azure.com</u>

C	reate a resource	
0	Get started	₽ Azure Bot ×
F	Recently created	Azure Bot

Figure 14: Searching for Azure Bot

- 2. Click the "Create Resource" button in the side bar. Enter "Azure Bot" in the search bar and select the matching option from the list.
- 3. Click **Create** to start creating the resource.

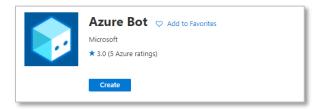


Figure 15: Create Azure Bot Resource

4. You should see a configuration page to create the Bot Channel Registration. Fill out the following fields:

Create an Azure Bot		
Basics Tags Review + create		
Project details		
Select the subscription to manage deployed manage all your resources.	ed resources and costs. Use resource groups like folders to organize and	
Bot handle * 🕕	Support-Dispatcher	~
Subscription * ①	Pay-As-You-Go Dev/Test	~
Resource group * 🕕	(New) Chime-Test-RG	~
	Create new	
New resource group location ③	East US	~
	ource. You can change your selection later in the Azure portal's resource options, or request a pricing quote, by visiting the	
Pricing tier *	Free Change plan	
Microsoft App ID		
	i Azure Bot resource. An App ID can be automatically created below, or you i here to input your new App ID and password.	
The app secret will be stored in Azure	Key Vault in the same resource group as your Azure bot. Learn more $\sigma^{\rm s}$	
Microsoft App ID	Create new Microsoft App ID Use existing app registration	

Figure 16: Create Azure Bot - Basics

- a. **Bot handle:** Select an appropriate name for the bot we would suggest matching the name of the queue in Chime that this bot will be used with.
- b. **Subscription:** Select an Azure subscription to tie this bot registration to.
- c. **Resource Group**: Select an existing Azure Resource Group to contain this registration, or create a new resource group. We would suggest creating a group and using it for all Chime bot registrations.
- d. Location: Select the most appropriate Azure datacenter location for your users. Pricing Tier:
 - If users will be primarily contacting Chime through the Teams client, then the F0 tier may be the most cost-effective and appropriate level
 - If users will be primarily using the web client to contact Chime, then select the S1 tier.
- e. Microsoft App ID: "Create new Microsoft App ID"
- 5. When this is completed, click "Review + create" then click "Create" and the bot registration will be created. After some time, this provisioning will complete, and you can navigate to the settings for the bot registration.
- 6. Next, navigate to the Channels tab for the bot registration. Click the Teams icon to enable the bot for Microsoft Teams

Home > Support-Dispatcher					
Support-Dispatcher Channels ····					
Overview	Connect to channels				
Activity log					
Access control (IAM)			5 J F L		
🔷 Tags	Name	Health	Published		
Settings	web Chat	Running			
🎍 Bot profile					
Configuration					
Channels					
👾 Channels (Preview)					
• Pricing	Add a featured channel				
Test in Web Chat					
A Encryption	🕀 🚺 🗰				
😂 Properties					



7. No additional configuration is needed for Chime functionality, so just click "Save" to enable the Teams channel

Support-Dispatcher	Channels
😢 Overview	Configure Microsoft Teams
Activity log	configure microsoft fearins
Access control (IAM)	
🗳 Tags	\leftrightarrow \rightleftharpoons \Box
Settings	
🍰 Bot profile	
Configuration	
Channels	Messaging Calling Publish
👾 Channels (Preview)	
O Pricing	
Test in Web Chat	Messaging Learn more
A Encryption	Messaging is available by default for your bot.
😂 Properties	Microsoft Teams Commercial (most common).
🔒 Locks	O Microsoft Teams for Government. Learn more
Monitoring	Delete channel to change the selection.
iii Conversational analytics	
Alerts	
Metrics	Cancel Save

Figure 18: Set up Teams Channel

8. If the Chime web client is going to be used to contact the queue, it is also necessary to configure the Direct Line channel

Home > Support-Dispatcher			
Support-Dispatcher C	Channels		
Search (Ctrl+/) «			
Overview		\Leftrightarrow \rightleftharpoons	
Activity log			
Access control (IAM)			
Tags	+ Add new site	Default Site 🖉	🖸 Disable F 📋
Settings	Default Site		
🚨 Bot profile			
Configuration		Secret keys	
Channels		****	Show Regenerate
🔄 Channels (Preview)			
O Pricing		XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Show Regenerate
Test in Web Chat			
A Encryption		Version	
Se Properties		Select which versions of the Direct Line protocol are enabled on this	
🔒 Locks		information about these versions can be found in the Direct Line r documentation.	eference
Monitoring			
M Conversational analytics		 □ 1.1 ☑ 3.0 	
Alerts			
🕍 Metrics	Done		

Figure 19: Set up Direct Line and Reccord Secret

- 9. Click on the Show button to reveal the Direct Line secret key. Save this value, as it will be required later to configure the bot in Chime.
- 10. Next navigate to the Configuration tab on the bot registration. Record the **Microsoft App ID** fields here, as they will be needed to configure the bot in Chime.

Support-Dispatcher	Configuration
	Messaging endpoint
Overview	https URL
Activity log	Enable Streaming Endpoint
Access control (IAM)	Арр Туре
🗳 Tags	MultiTenant
	Microsoft App ID (Manage) 🕕
Settings	4f59a763-c351-4b49-920a-38c70e46cae8
🧟 Bot profile	Application Insights Instrumentation key 🕥
Configuration	Instrumentation key (Azure Application Insights key)
Channels	Application Insights API key ①
👾 Channels (Preview)	······
O Pricing	Application Insights Application ID
Test in Web Chat	Application ID (Application Insights Application ID)
A Encryption	Schema Transformation Version
🔁 Properties	V1.3 V
A Locks	This determines how Bot Service converts messages sent between your bot and channels. Learn more
Monitoring	No OAuth Connection settings defined
Genversational analytics	Add OAuth Connection Settings
Alerts	
👬 Metrics 🗸	Apply Discard changes

Figure 20: Record App ID

- 11. At the present time, there is no way to determine the password that is associated with the automatically created App ID for the bot registration, so it is necessary to create a new password.
- 12. Click the Manage link next to the Microsoft App ID field. This should bring you to a new page where it is possible to create a new password.

Home > Support-Dispatcher > Suppo	ort-Dispatcher			Add a client se	ecret	
💡 Support-Dispatche	r Certificates & secre	ets 🖈 …				
				Description	chime	
P Search (Ctrl+/) «	♡ Got feedback?			Expires	Custom	
Overview	scheme), i or a higher lever or assure	ance, we recommend using a cer	uncate (mot	Start	09/28/2021	
🗳 Quickstart						
🐔 Integration assistant	Certificates			End	09/28/2023	
Manage	Certificates can be used as secrets t	o prove the application's identity	when reque			
Branding	↑ Upload certificate					
Authentication	Thumbprint		Start d			
📍 Certificates & secrets	No certificates have been added for	this application.				
Token configuration						
 API permissions 						
Expose an API	Client secrets					
App roles	A secret string that the application (uses to prove its identity when re	equesting a t			
A Owners						
🕹 Roles and administrators Preview	+ New client secret					
III Manifest	Description	Expires	Value			
Support + Troubleshooting	No description	9/27/2026	LVa***			
P Troubleshooting						
New support request						
				Add Cancel		

Figure 21: Add Client Secret

- 13. Click the "New client secret" button.
- 14. Add a description (example: "chime") and set 2 years expiration date (max).
- 15. Record the Client Secret value that is generated it will be necessary to configure the bot in Chime.
- 16. With the **Bot Handle, Microsoft App ID, Client Secret,** and **Direct Line secret**, it is possible to setup the bot as a dispatcher in Chime.

Note: often time's users will want to have multiple bots added to a Queue so that each Agent can take multiple chats at the same time. If you would like to do this, repeat the "Creating A Dispatcher Resource" steps for however many concurrent chats you want Agents to be able to take at once.

ADDING THE DISPATCHER INTO CHIME

Once you have created the dispatcher, you will want to add it into your Chime instance. Follow these next steps to add the Dispatcher in Chime and how to configure the messaging endpoint in the bot.

1. With the Bot Handle, App ID, App password, and Direct Line secret, it is possible to setup the bot as a dispatcher in Chime. Navigate to your Chime server, and then to Admin/Dispatchers, and click the New Dispatcher button.

CHIME			Home My Guest Dashboard My Agent Dashboard My Manager Home + Admin
😵 Health Monitor	New Dispatcher		
😤 People	Q Search Active Directory The disp	atcher account is the entry point f	t for a queue. Users can contact this account to connect with agents. This account must be unique.
≓ Dispatchers	Account Settings		Chime Settings
© Settings	Bot ID		Description
View Archived	Bot ID		
>_ Control Panel	Webchat Secret		Dispatcher Type
Virtual Agents	Bot Name		Testing
External Bots	Bot name		Queue
	Bot Secret		Not assigned
	Bot Secret	Show Password	
	Email Address		
	Email Address		
			색 Cancel 🗸 Verify Settings 🛛 영 Save

Figure 22: Add New Dispatcher in Chime

- 3. Enter the information from the bot registration in the following fields:
 - a. Bot ID: the Microsoft App ID of the bot registration
 - b. Webchat Secret: The Direct Line secret key
 - c. Bot Name: The Bot Handle
 - d. Bot Secret: The Microsoft App ID password
- 4. Once this is completed, you should be able to verify and then save the new dispatcher.
- 5. Once the dispatcher has been created in Chime, the next step is to create a new queue or add the dispatcher to an existing queue. Once this is done, you should see a block on the queue settings page that displays the URL for the messaging endpoint for the queue when it is running in Chime:

CHIME				Home My Guest Dashboar	rd My Agent Dashboard My	y Manager Home 👻 🛛 Ar	dmin 🔘
Queue Settings Eric Bot					🛛 Learn m	ore about these setting	gs 🗶
Basic People	e Virtual Age	nts Text Resource	s R	louting	Schedule	Advanced	
Queue Properties			Engine Properties				
Name			A Changes to these settings m	nay cause the queue to restart. Any act	tive sessions may be dropped.		
Description			License				
			a _{e Lic}	censed for (3) users until 12/31/2020	₹3 Alerting enabled for (25) recip	ients	(R)
Language English	Web Client Default Web Client		Queue Bot Messaging Endpoint Dispatcher and alias Bot Framewo	t ork bots assigned to this queue below	should be directed to this URL in th	he Azure Portal	
Guests can request chat transcripts	Publish to Home Page Published		Queue Dispatcher				a b
Send chat transcripts via email	Show Chat Links on Home P Both	age v	Dispatcher Aliases				
OI	Both		Bot	▲Bot ID		1	Remove
📥 Download Teams App Package			Dru, Taarra, Brit, 2007	States The Review of the	anation of		
			Dry, Tearry, No., 1871	100 C 100 C 100 C 100 C			
		De .	► Start		Stop	C Restart	
					🖨 Queue Dashboard 🗮 Mar	nage Queues 🗇 Reset	🖺 Save

Figure 23: Chime Queue Settings

- 6. Take this URL, and go back to the Bot Channel Registration in the Azure portal, then navigate to the Settings tab.
- 7. Paste this URL into the Messaging endpoint field for the bot and save the changes.

Dashboard > ChimeBot2_77b - Overview > ChimeBot2 - Settings				
ChimeBot2 - Settings Bot Channels Registration				
,> Search (Ctrl+/) «	Rave X Discard			
Overview	Bot profile			
 Activity log 	lcon			
Access control (IAM)	Upload custom icon			
Tags	30K max, png only			
	* Display name 🕐			
Bot management	Conduct			
Test in Web Chat	Bot handle 🕐			
nalytics	ChimeBot2			
Channels	Description ()			
Settings				
log Speech priming				
 Bot Service pricing 				
Support + troubleshooting	Configuration			
New support request	Messaging endpoint https://chime/bot/1/api/messages			
	Microsoft App ID (Manage)			
R	and the second second second second			
	Analytics			
	Application Insights Instrumentation key 🕢 Instrumentation key (Azure Application Insights key)			
	Application Insights API key () API key (User-Generated Application Insights API key)			
	Application Insights Application ID Application ID (Application Insights Application ID)			
	OAuth Connection Settings			
	No settings defined			

Figure 24: Settings - Configuration