instant

CHIME

CHIME 2.4

QUICK GUIDE TO GETTING STARTED

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CONTENTS

INTRODUCTION

This guide is designed to show new users of Chime how to start using the application, including setting up the first queue, adding a dispatcher account, and adding agents into the queue.

If you have any questions during this process, please contact support@instant-tech.com.

OVERVIEW OF WHAT'S COVERED

This is a quick how-to guide for new users that will cover the following items:

- Accessing the Chime application URL
- Adding a new dispatcher account
- Adding a new person
- Setting up a queue
- Adding people into the queue
- Installing the Context Window
- Starting a chat with the queue

CHIME 2.4 FOR OFFICE 365 AND ON PREMISE

If Chime has been installed and the web client was set up, then follow these instructions for getting started with Chime 2.4.

ACCESSING THE APPLICATION

Once Chime has been installed successfully, the application can be accessed through a web browser. The URL will be the address of the server that Chime is installed on.

Note: The format of the URL should be: http://[ServerName]/chime.

LAYOUT OF CHIME 2.4

When you initially access Chime, you will be routed to 'My Dashboard'. At the top right of the web page there are 4 tabs that you can click on that will allow you access to the various pages of the Chime application. In order they are 'My Dashboard', 'System Dashboard', 'Queues', and 'Admin'.
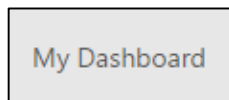
Admin View:

| My Dashboard | System Dashboard | Queues | Admin |

Manager View:

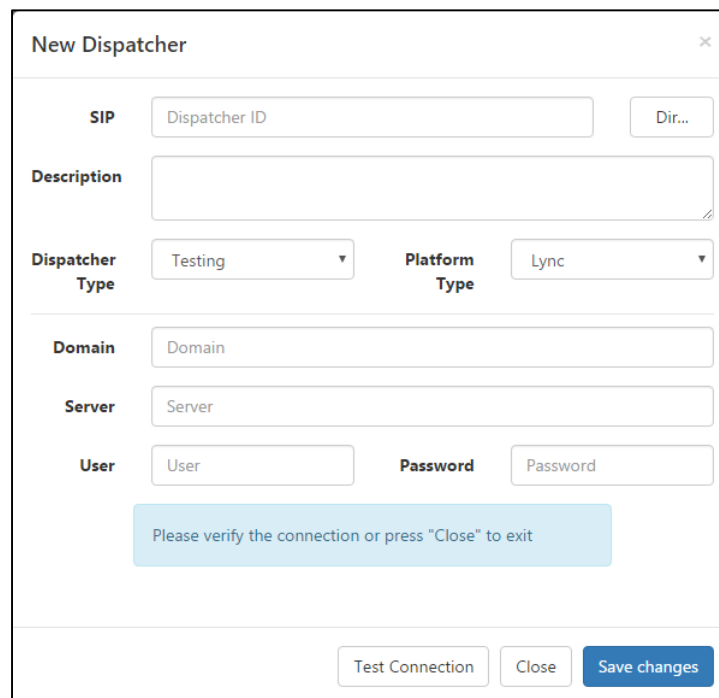| My Dashboard | System Dashboard | Queues |

Agent View:

| My Dashboard |
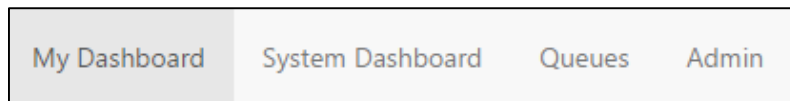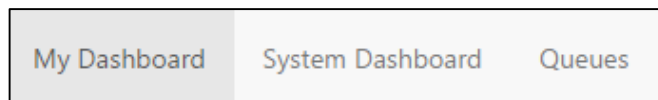
ADDING A DISPATCHER

In order to route chats to agents, Chime needs a Lync-enabled account that will broker chats to agents. Each queue needs a dispatcher and the Lync account will act as the dispatcher.

1. Click on 'Admin' to access the Admin Page.
2. On the left-hand side menu, navigate to the 'Dispatchers' section.
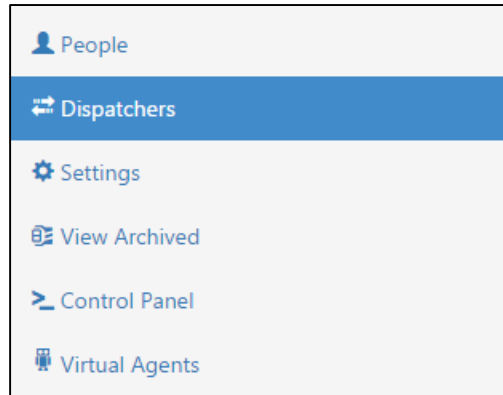
3. On the Dispatchers page, click on the 'New Dispatcher' button.
4. This will open the New Dispatcher modal.

5. Enter the SIP ID of the Lync-enabled account that will act as the dispatcher.
6. Enter a description for the new Dispatcher (optional).
7. Pick a Dispatcher Type (Development, Testing, or Production). Note: this is just for labeling purposes.

8. Pick the platform type for the Dispatcher account.
    a. If you've installed Chime for Lync using Office 365, select the 'Office 365 Lync' option.
    b. If you've installed Chime for Lync using an On Premise server, select the 'Lync' option.
9. Enter the name of the domain that the dispatcher account belongs to.
10. If using Office 365 Lync, the server field should already be filled out. If it's not already filled out, it should be: **sipdir.online.lync.com:443**.
11. Enter the username and password of the dispatcher account.
12. Click on 'Test connection' to verify the account settings.
13. Once the modal shows a notification that the connection was successful, click on 'Save' changes and 'Close'.
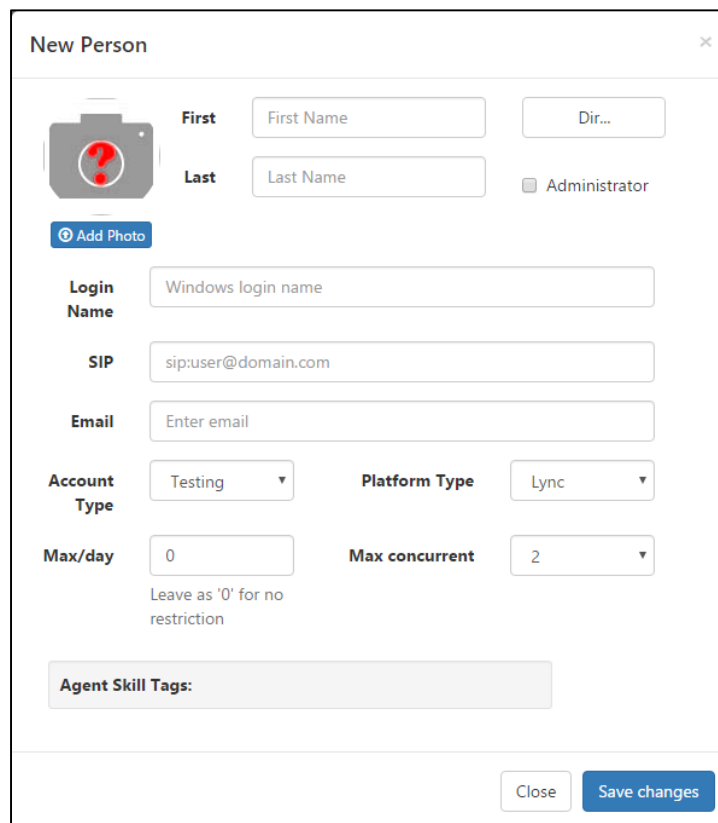
ADDING PEOPLE

Once a new dispatcher has been created, you are almost ready to set up your first queue. To add some additional people into Chime as agents and/or administrators, follow these steps.

1. Click on 'Admin' to access the Admin Page.
2. On the left-hand side menu, navigate to the 'People' section.
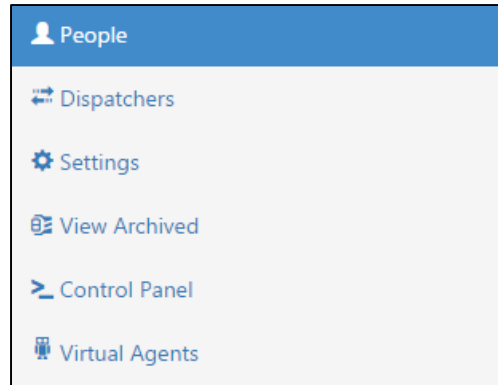
3. On the People page, click on the 'New Person' button.
4. This will open the New Person modal.

5. To search for someone to add, click on the 'Dir…' button. This will bring up a directory search.
6. Type in the partial or full name of the person you want to add.

PM Mar_10_2016
Rev 2

7. Click on 'Search'.
8. Once you've found the person you want to add, click on the button on the right side of the grid.
9. If the person you are looking for is not available, you will have to enter the information manually.
10. If this person will be an administrator, check off the Administrator box.
11. Choose the following options for this person: (optional)
    a. Account Type
    b. Platform Type
    c. Max/Day
    d. Max concurrent

CREATE A NEW QUEUE

The queue that you will create here will be the central part of the helpdesk. You will connect the queue with the dispatcher you created in Admin, and add some people who will act as agents in the queue.

1. Navigate to the Queues page.
2. Click on the 'New Queue' button. This will bring up the New Queue modal.

3. Choose a name for the Queue: examples: IT Helpdesk, Sales, Support
4. Fill out a description for the queue: (optional)
    a. Mode: Select a mode from the drop-down list: Development, Testing, or Production. Note: This is for labeling purposes.
    b. Language: Select a Language for the Queue from the drop-down list. Note: This is for labeling purposes, and does not change the language of the UI.
    c. License: Select a license from the drop-down list. If you are using a trial version, you will have one license available to you.
    d. Web Client: Select a Web client from the drop-down list. Note: Initially the 'Default Web Client' will be the only one available. More can be added later through the Admin page.

5. Select a Dispatcher. Click on the Select Dispatcher button and a window will open with a list of the dispatchers that are available.
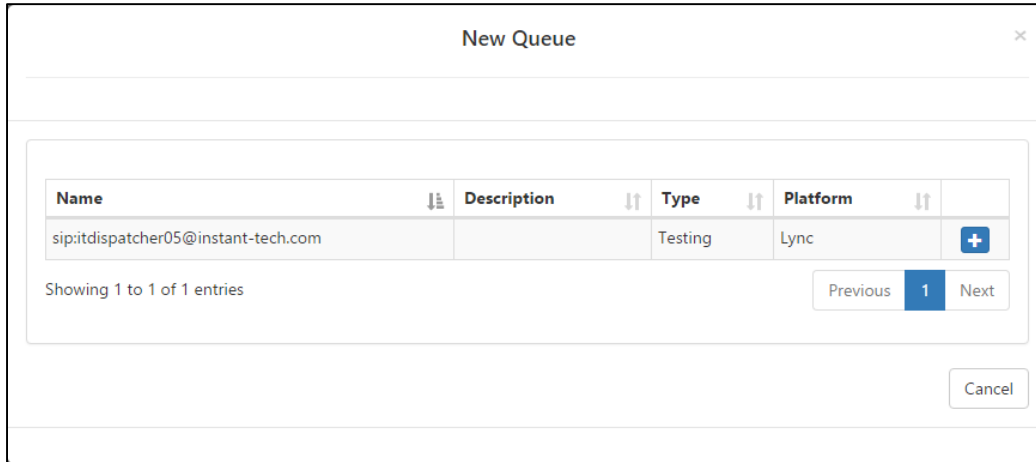

6. Click on the ➕ button to associate this dispatcher with the new queue.
7. Click 'Save', and 'Close'.
8. You are finished creating a new queue. Now, the queue needs to be enabled so that people can be added into it.

ENABLING THE QUEUE

Once you've created a new queue, that queue should show up on the 'Queues' page. When you go to the 'Queues' page, the new queue that you just added will appear on the grid. By default, the queue will be listed as 'Disabled'.
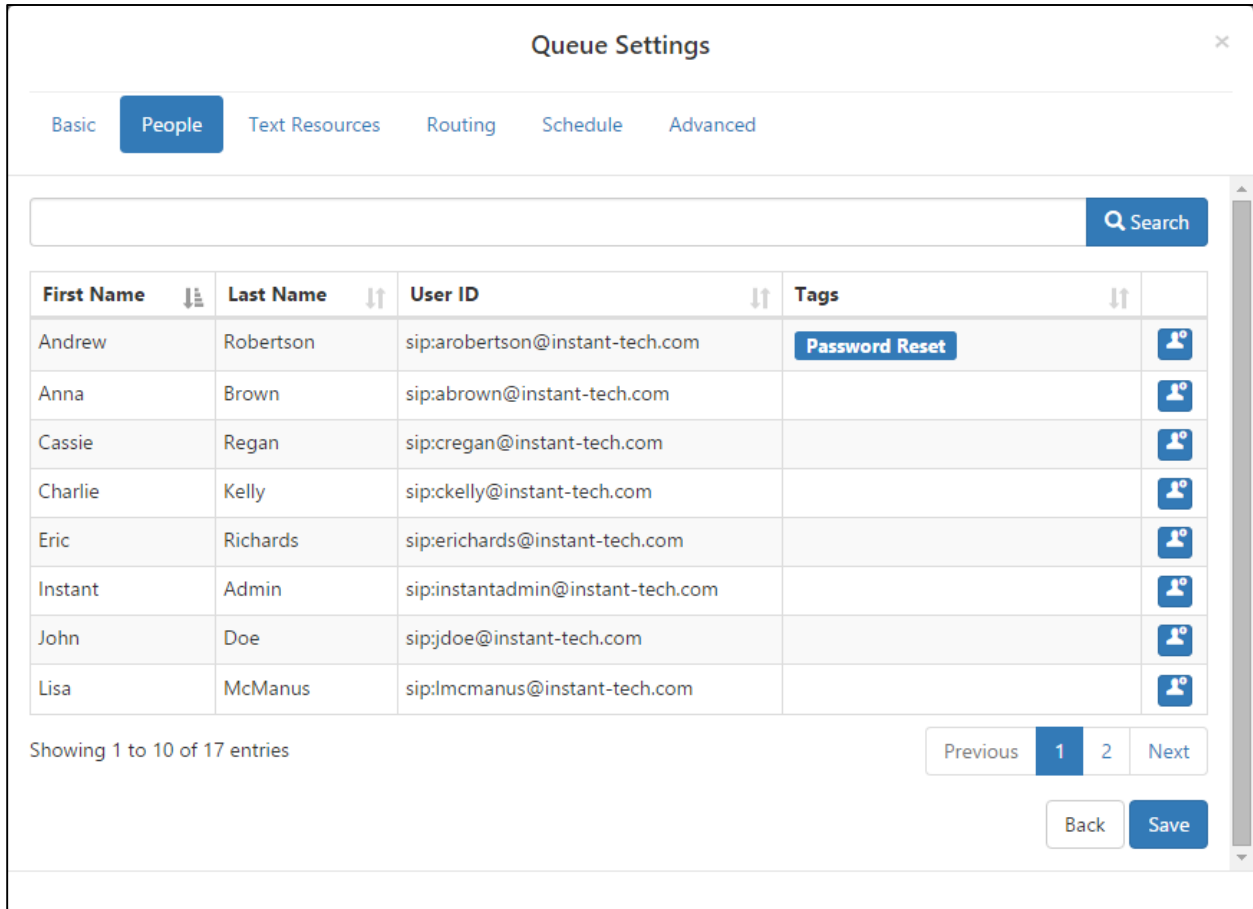
1. To enable the queue, click on the 'Edit Queue' button on the far right side of the grid. This will bring up a modal that will display the settings for the Queue.
2. Make sure you are in the Basic tab of the Queue Settings modal.
3. Toggle the 'Queue State' button until it switches to 'Enabled'.
4. Save changes, and Close.

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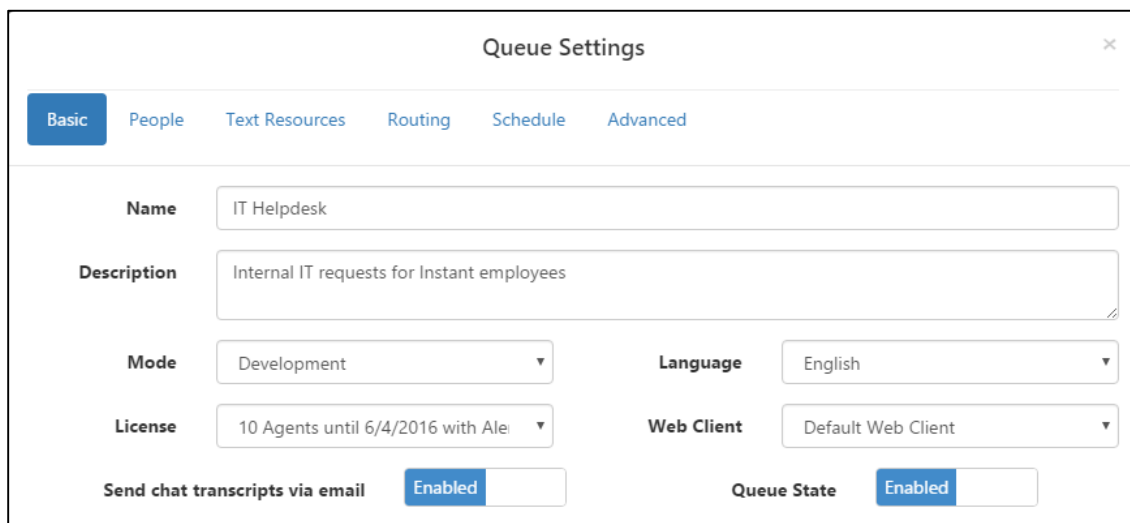
ADDING PEOPLE TO THE QUEUE

To add people into a queue, they must first have been added into the Admin section. Once they have been added, they can be associated with one or more queues.

1. Go to the 'Queues' page.
2. Click on the blue 'Edit Queue' button to open Queue Settings.
3. Navigate to the 'People' tab.
4. Click on the 'Add Agents' button.
5. This will bring up a list of the people who have been added into Admin.

6. To add a person, select the blue 'Add Person' button on the right side of the grid. Their name will be displayed at the bottom of the modal. Click on the 'X' if you do not want to add them.
7. Click 'Save' when you are finished adding people.
8. The people you added into the queue will be displayed in the 'People' Section.

PM Mar_10_2016
Rev 2

Before taking chats it is important that you install the Lync registry key to enable the context window. If you take a chat without the context window installed, you will not have access to any of the Agent in-chat features.

The instalation for On Premise and Office 365 is different. Agents with an On Premise Lync server will have to install the Context Window Extension while agents with Office 365 should install the Agent Asist Tool to gain access to the Context Window.
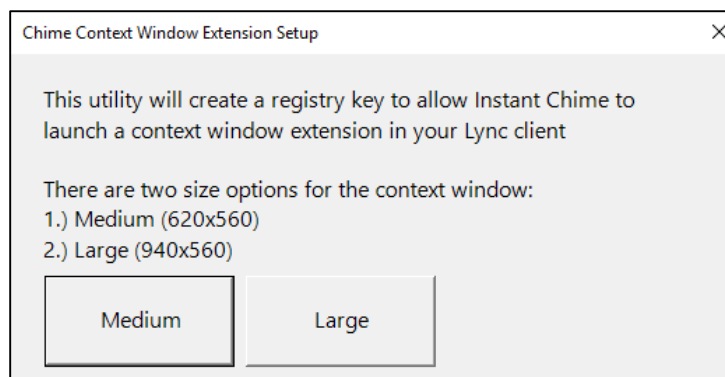
CONTEXT WINDOW EXTENSION SETUP (ON PREMISE)

1. On the My Dashboard page there are two download buttons on the left side of the page. Click on the one that says 'Download CWE Setup'.
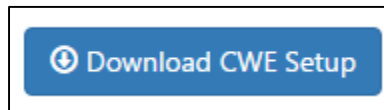
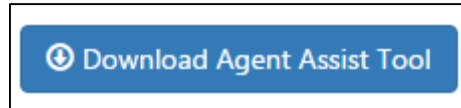2. Open up the location that you downloaded the file to and then run the ChimeAgentCWE.exe file.
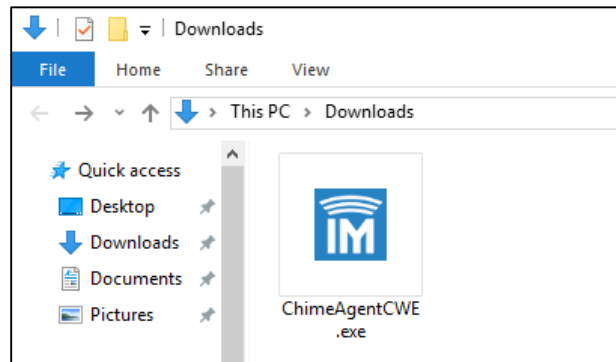
3. When the program opens you will be presented with two options to choose for the size of your context window. You can choose either at this point as it is mainly based on preference and can be changed later. After selecting the size, a box will pop up notifying that you have successfully completed the setup for the Context Window Extension.
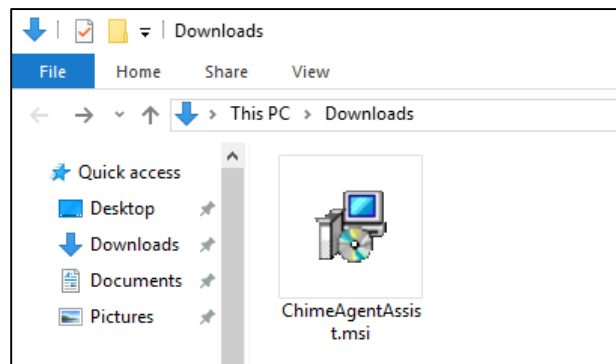
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Rev 2

1. On the My Dashboard page there are two download buttons on the left side of the page. Click on the one that says 'Download Agent Assist Tool.
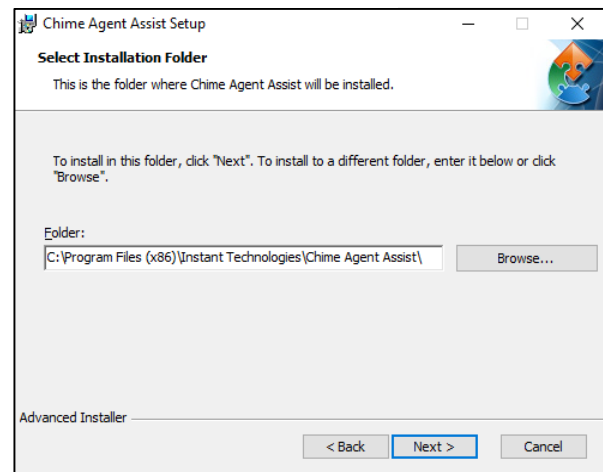

2. Open up the location that you downloaded the file and double-click on the ChimeAgentAssist.msi file to begin installing it.
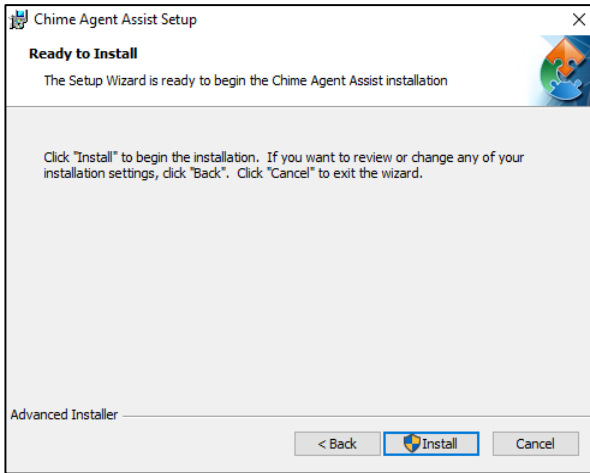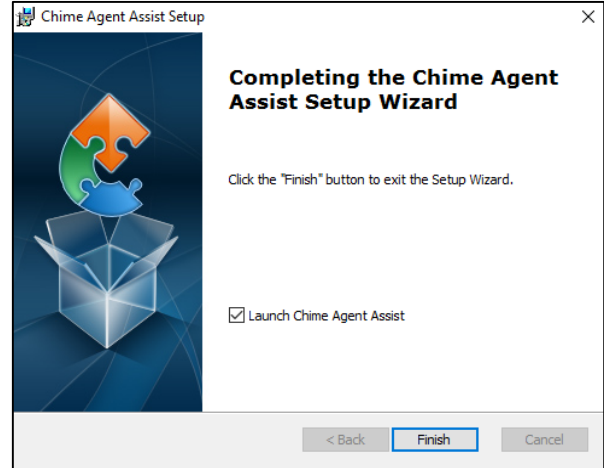

a. Select 'Next'

b. Then 'Next' again
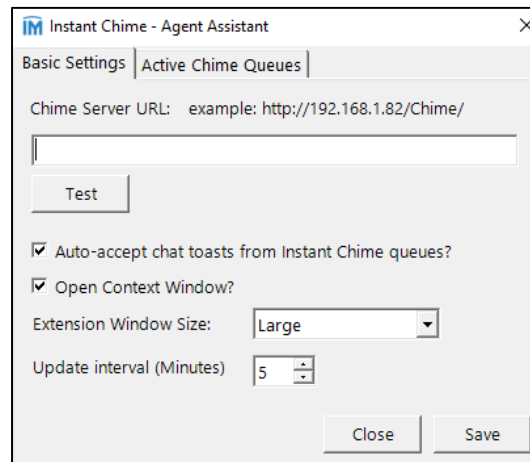
c. Click 'Install'

d. Click 'Finish'

3. To use the tool, you will need to go to your taskbar and find the icon with the Chime Agent Assist Tool logo on it.

4. Right-click the icon and it will bring up a menu with four options. Select options and it will open a window.

5. In the 'Basic Settings' tab, add your server URL in the space provided. Note: remember to have the URL in the same format as before (http://[NameOfServer]/chime)
6. Make sure to have all the boxes checked and the size of the extension window chosen. Save after making any changes.
7. Go to the Active Chime Queues and click refresh. It will display the Queue that you added earlier.
8. Once you have finished making any changes to the Agent Assist Tool, close the window.
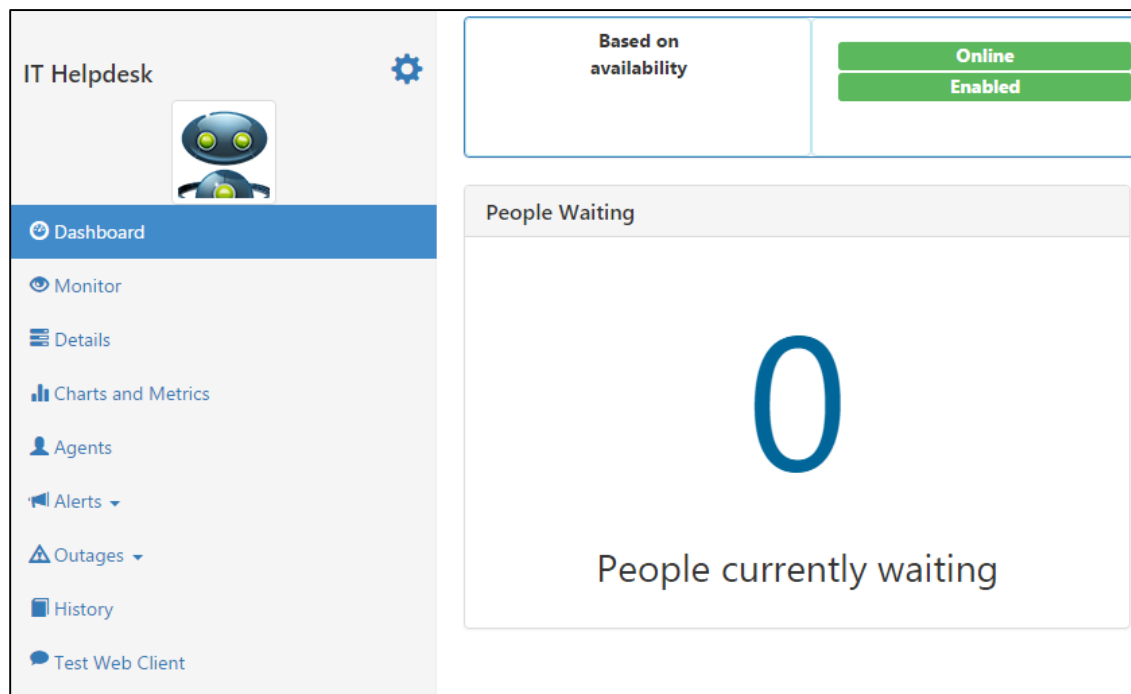
STARTING A CHAT WITH THE QUEUE

There are a few things that need to take place in order to successfully route a chat using the web client:

1. At least one agent with a Lync-enabled account must be added to the queue.
2. The queue must be labeled on the System Dashboard as 'Enabled' and 'Online'.
3. At least one agent must be online and set as 'Available' in Lync.

USING THE QUEUE DASHBOARD

The Queue Dashboard is used for a number of different things. You can Monitor chats, View Statistics for the chats, Manage Alerts and Outages, View History and Test the Web Client.

1. To access the Queue Dashboard, navigate to the 'Queues' Page.
2. On the left-hand side of the grid, click on the ⏱ button.
3. You are now on the Queue Dashboard.
4. On the Queue Dashboard, verify that the queue is Online and Enabled.

START A WEB CHAT

1. To start a chat with the queue, navigate to the Queue Dashboard.
2. Click on the 'Test Web Client' button.
3. Fill out the pre-chat form and enter a question. Click Start Chat.
4. You should receive a notification message that the queue will locate someone to help you.