

 instant

  
**CHIME**

## USER GUIDE

Winter 2017

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## INTRODUCTION

Chime is intended to provide a platform to provide additional channels to a new, or existing, service desk. Typically, this involves providing the ability to provide an IM based access point to a collection of agents representing a service desk. This might involve IM enabling a service desk related to IT support requests, HR requests, or internal sales support.

Chime is intended to support an 'on premise' deployment model, where the Chime server is deployed within an existing enterprise IT architecture. Where possible, Chime will leverage and extend common enterprise systems such as Microsoft Lync, Microsoft Active Directory, Microsoft SQL Server, IBM DB2, IBM Sametime, and other common platforms.

In an enterprise 'click to chat' deployment, Chime provides a platform to associate agents with a service desk queue, associate an IM dispatching layer with the service desk, and automatically provides a set of dashboards, and reports, to create, monitor, and measure all activity.

This document will provide an overview of the various modules within the Chime platform and describe how to initialize and configure the Chime environment.

This document is intended as a guide to help you fully utilize Chime. If you have any further questions, please contact us at [support@instant-tech.com](mailto:support@instant-tech.com)

## OVERVIEW

Chime is intended to offer a platform that provides additional channels to a new, or existing, service desk. Typically, this involves providing the ability to run an IM based access point to a collection of agents representing a service desk. Additionally, Chime provides a state of the art alert system to notify employees on your network about new developments throughout the day. Chime has the capability to run the inbound (click-to-chat) and the outbound (alert notifications) features in tandem, as well as on their own.

Chime utilizes the existing IM infrastructure deployed within an enterprise to help broker and establish a connection to what we call Queues. Each Queue has a set of properties that define how the Queue will send out alerts, listen for inbound requests, and route requests that are received.

Typically, a Queue will have the following important properties:

- List of people (agents) who can provide assistance
- IM dispatching entity (i.e. a named entity that logs into an IM server on behalf of the queue)
- Alert dispatching entity (i.e. a named entity that dispatches IM alerts to users)
- Set of properties to define how the queue behaves
- Set of inbound listening systems (i.e. click to chat links)
- Possible integration with other systems such as internal directory, CRM system, or existing ticketing system

## ACCESSING THE APPLICATION

After successfully installing Chime, the first thing to do is to access the application. Open your web browser, and access the site at < *SERVER\_ADDRESS/Chime* >. You should be prompted for some credentials to access the site. Enter the correct credentials to proceed.

If Chime is deployed On-Premise, then you will be prompted for your Windows credentials. If deployed on Office 365, then you will be prompted to enter in Office 365 credentials:

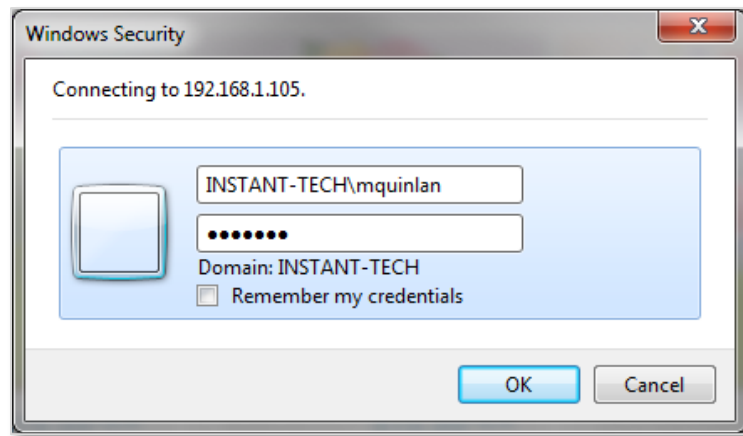


Figure 1: Windows Authenticated Login

To utilize the features in Chime, you will first need to configure a queue. When configuring a queue you will first need to do three things:

1. Add people into the Admin section who will eventually be added to the queue
2. Create a dispatcher that will broker all conversations
3. Add agents, or groups, into the new queue

To start configuring queues, go to the Admin section at the top of the page.

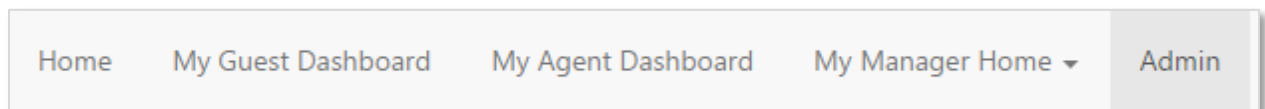


Figure 2: First look at Chime



## ADMIN

The Admin area has seven main categories: *Health Monitor*, *People*, *Dispatchers*, *Settings*, *View Archived*, *Control Panel* and *Virtual Agents*. Only users who are defined as administrators will be able to access this portion of the application.

## HEALTH MONITOR

The Health Monitor section shows at a glance the health of various services that Chime depends upon. In the individual panels, one can see information on the state of the various components:

- Directory Service (Active Directory or Azure Active Directory) connection information and status.
- Status of the Chime Windows service account.
- Status of the Chime database connection.
- Chime database counts.
- Connection information for ChimeHub, if enabled.
- Status of the Chime web client accounts.
- Status of the SMTP email integration features.

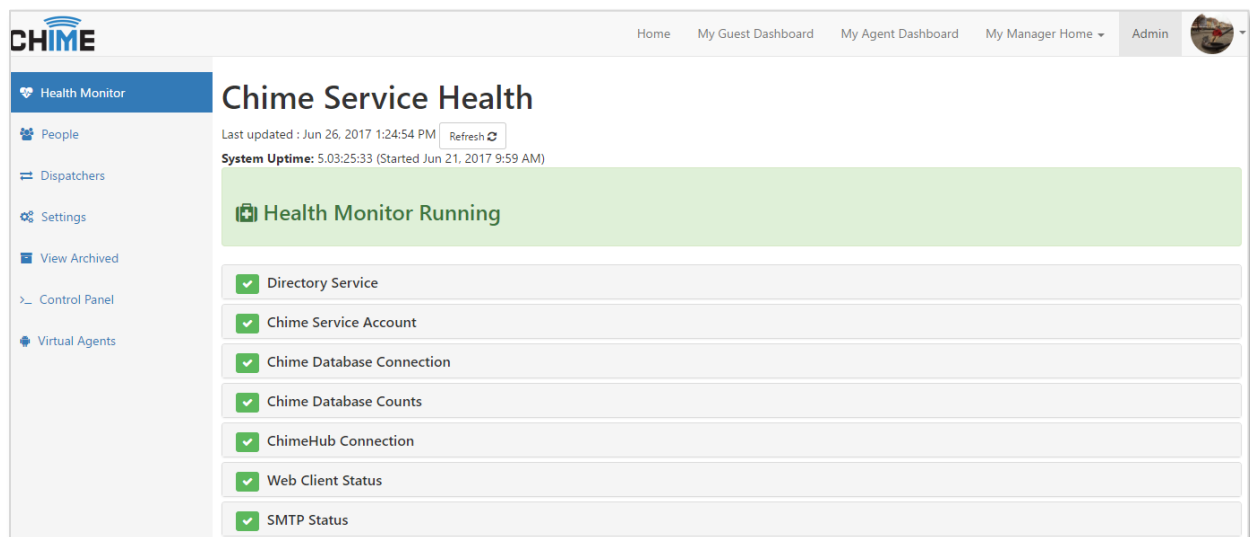


Figure 3: Chime Health Monitor

## USER ROLES

### SYSTEM-LEVEL ROLES

**Administrator:** An account with the administrator role has full access to the Chime app. They can view all queues, users, logs, as well as change queue and admin settings.

**User:** An account with the user role has access to log into Chime, but does not have access to the Admin section. Additionally, a user can only acquire queue-level roles once they are added to a queue. A user will typically be configured as a manager, reviewer, or an agent after they are assigned to a queue.

### QUEUE-LEVEL ROLES

Each queue independently assigns a user role to the users provisioned in the queue. For example, if you are assigned to two different queues, the user role in one queue will not impact the privileges in the other queue.

**Note:** Only a User is affected by the following Queue level roles. An Administrator is not affected by the Queue level roles.

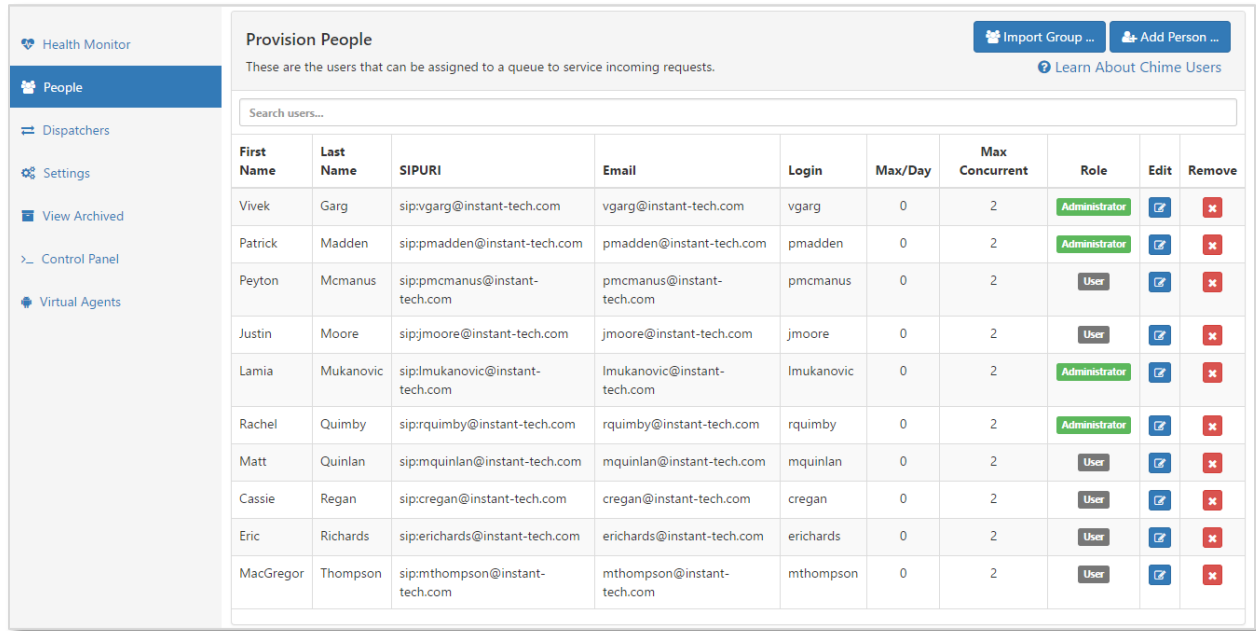
**Manager:** Setting a person as a Manager allows that person to edit queue settings and view the queue dashboard and reports. A manager has all of the capability of a reviewer, and an agent, but also has the ability to modify the queue properties and add/remove people from the queue.

**Reviewer:** Setting a person as a Reviewer allows that person to view the queue dashboard and reports, but not change any settings or properties. A reviewer has all of the functionality of an agent (can accept chats if required), but can also review chats and reports across an entire queue.

**Agent:** An agent is a person who receives the chats sent out by a guest. The amount of agents a queue can have is determined by that queue's license key. In order for a queue to receive and accept a chat, there must be at least one agent online to receive it. Agents are not able to view the queue dashboard, reports, or change any settings and properties.

## PEOPLE SECTION

This section is where people are provisioned. Adding a person here imports them to the Chime directory so they can then be added into a queue. Once added to a queue, they will be able to receive incoming chat requests. This is where you'll set global properties associated with each user. Admin rights are also configured in this section.



**Provision People**

These are the users that can be assigned to a queue to service incoming requests.

Search users...

First Name	Last Name	SIPURI	Email	Login	Max/Day	Max Concurrent	Role	Edit	Remove
Vivek	Garg	sip:vgarg@instant-tech.com	vgarg@instant-tech.com	vgarg	0	2	Administrator		
Patrick	Madden	sip:pmadden@instant-tech.com	pmadden@instant-tech.com	pmadden	0	2	Administrator		
Peyton	Mcmanus	sip:pmcmanus@instant-tech.com	pmcmanus@instant-tech.com	pmcmanus	0	2	User		
Justin	Moore	sip:jmoore@instant-tech.com	jmoore@instant-tech.com	jmoore	0	2	User		
Lamia	Mukanovic	sip:lmukanovic@instant-tech.com	lmukanovic@instant-tech.com	lmukanovic	0	2	Administrator		
Rachel	Quimby	sip:rquimby@instant-tech.com	rquimby@instant-tech.com	rquimby	0	2	Administrator		
Matt	Quinlan	sip:mquinlan@instant-tech.com	mquinlan@instant-tech.com	mquinlan	0	2	User		
Cassie	Regan	sip:cregan@instant-tech.com	cregan@instant-tech.com	cregan	0	2	User		
Eric	Richards	sip:erichards@instant-tech.com	erichards@instant-tech.com	erichards	0	2	User		
MacGregor	Thompson	sip:mthompson@instant-tech.com	mthompson@instant-tech.com	mthompson	0	2	User		

Figure 4: People Grid

## ADDING A PERSON

To add a new person to the Chime directory, click the **Add Person** button above the grid.

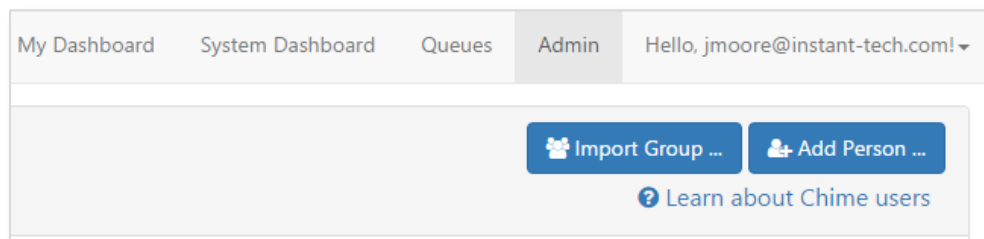
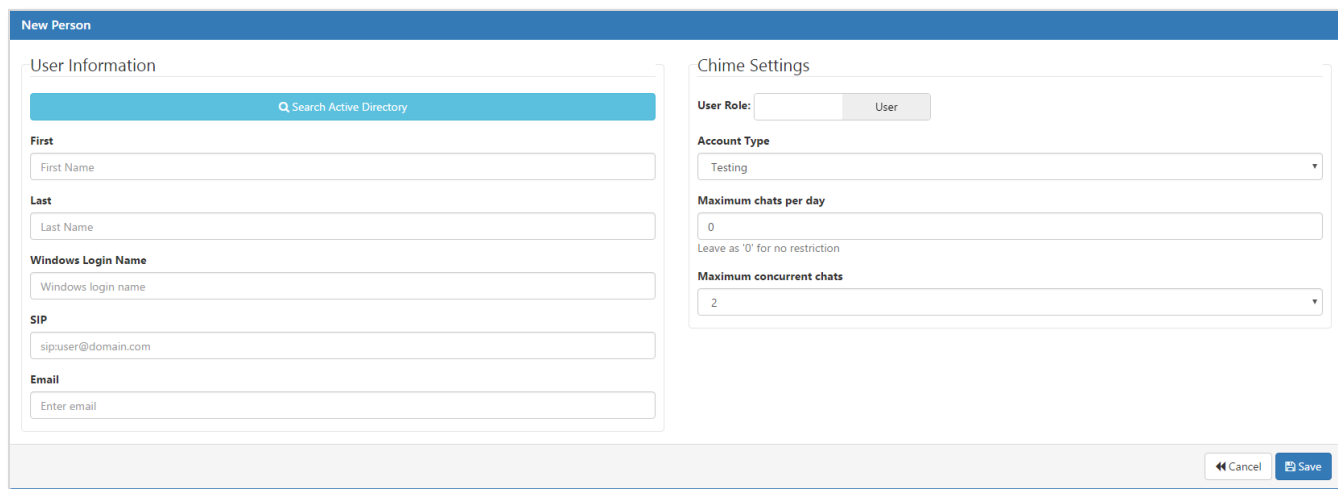


Figure 5: Adding a new person

The **Add Person** button should bring up the Add Person configuration window.

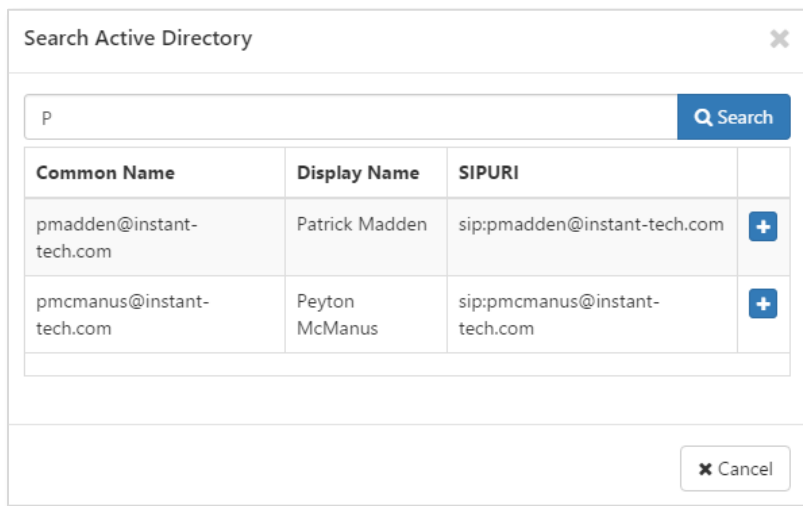


The 'New Person' configuration window is divided into two main sections: 'User Information' and 'Chime Settings'. The 'User Information' section on the left contains a 'Search Active Directory' button at the top, followed by input fields for 'First' (First Name), 'Last' (Last Name), 'Windows Login Name' (Windows login name), 'SIP' (sipuser@domain.com), and 'Email' (Enter email). The 'Chime Settings' section on the right includes a 'User Role' dropdown set to 'User', an 'Account Type' dropdown set to 'Testing', a 'Maximum chats per day' input field set to '0' with a note 'Leave as 0 for no restriction', and a 'Maximum concurrent chats' dropdown set to '2'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 6: Chime person settings

Using this form, you can enter all the fields manually or you can click the **Search Active Directory** button to search your directory service for a specific user.

In the directory picker, enter a name to search for and press the **Search** button. Chime will search your directory, and return possible matches. To add the user's information to the Add Person form, click on the + icon to the right of the user's information in the grid.



The 'Search Active Directory' window features a search input field with the letter 'P' and a 'Search' button. Below the search bar is a table with three columns: 'Common Name', 'Display Name', and 'SIPURI'. The table contains two rows of search results, each with a blue '+' icon in the rightmost column. The first row shows 'pmadden@instant-tech.com' as the Common Name, 'Patrick Madden' as the Display Name, and 'sip:pmadden@instant-tech.com' as the SIPURI. The second row shows 'pmcmanus@instant-tech.com' as the Common Name, 'Peyton McManus' as the Display Name, and 'sip:pmcmanus@instant-tech.com' as the SIPURI. A 'Cancel' button is located at the bottom right of the window.

Common Name	Display Name	SIPURI	
pmadden@instant-tech.com	Patrick Madden	sip:pmadden@instant-tech.com	+
pmcmanus@instant-tech.com	Peyton McManus	sip:pmcmanus@instant-tech.com	+

Figure 7: Selecting a user from the directory picker

This will populate the appropriate fields with any of the information available from the directory.

**First:** The person's first name

**Last:** The person's last name

**Windows Login Name:** The agents Windows login name

**SIP:** The SIP address for the user

**Email:** An email address for the user (optional)

**User Role:** Provides user Administration rights to Chime. This is a global setting. People can be given rights to manage queues in Queue Settings

**Account Type:** Specifies whether the account is used for Testing, Development, or Production

**Maximum Chats Per Day:** Maximum number of chats a user can handle for one day. 0 allows unlimited chats

**Max Concurrent Chats:** Specifies the maximum number of concurrent chats a person can handle (Cannot exceed Max/day)

Once all the settings are configured click **Save**, and the user will instantly be provisioned within Chime.

---

## IMPORTING GROUPS

If you have certain Active Directory groups that you want to add in to the Chime system, you can click the **Import Group** button above the grid.

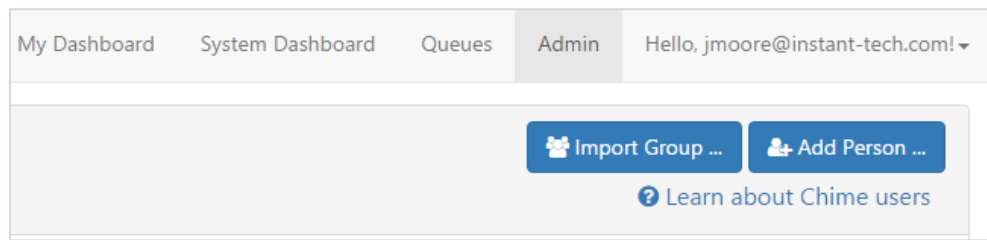


Figure 8: Importing a new group

This will pull up a User Settings modal. Here you will be able to use the **Search Active Directory** button to search for the AD group that you want to add. In the directory picker, enter a name to search for and press the **Search** button. Chime will search your directory, and return possible matches. Click the + icon next to the name. This will add the name of the group to the Group Name field.

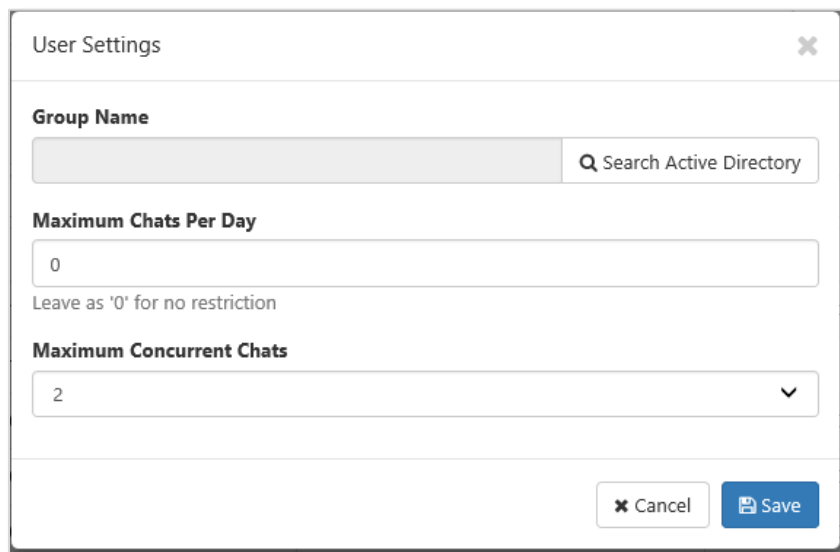

A screenshot of the 'User Settings' modal. The modal has a title bar with 'User Settings' and a close button (X). It contains three main sections: 'Group Name' with a text input field and a 'Search Active Directory' button; 'Maximum Chats Per Day' with a text input field containing '0' and a note 'Leave as '0' for no restriction'; and 'Maximum Concurrent Chats' with a dropdown menu showing '2'. At the bottom right are 'Cancel' and 'Save' buttons.

Figure 9: User Settings

Next, choose the Maximum Chats Per Day and Concurrent Chats fields for each member of the group. Once all of the fields are filled out correctly, click the **Save** button. This will bring you back to the People grid and will add all of the users from the AD group.


---

## EDITING A PERSON

To edit an existing person's settings, click the  icon associated with that user in the people grid. This will open a window with the same fields as the Add Person window, but will allow you to edit an existing entry. Make any desired changes, and click **Save** to update the person.

---

## DELETING A PERSON

If you need to remove a person from Chime, click the  icon in the people grid. This will bring up a confirmation window, where you can confirm the removal or cancel. The removal will set the user as archived, and you can restore a person at a later point if you need to, or permanently delete them from the database.

## DISPATCHERS

A dispatcher is a Lync-enabled account that is used to send out alerts and broker chats within Chime. The dispatcher needs a Lync-enabled account that is previously configured with your chat system. It is recommended that you create a user with a name that correlates with the queue you will create.

### ADDING A DISPATCHER

To add a new dispatcher to Chime, click the **New Dispatcher** button above the grid.

This should bring up the New Dispatcher window. To set up a dispatcher, the following fields must be filled out:

**Dispatcher SIP URI:** The SIP address for the dispatcher

*Note: All dispatcher accounts must be Lync-enabled to work with Chime*

**Lync/Skype for Business FE Pool:** Address of the chat server (Lync) that Chime will log into

**Domain:** Domain that the account is provisioned in

**Username:** Full username of the account being used for the dispatcher

**Password:** Password to use when logging into the chat server

**Email Address** (optional): An email address can be associated with the dispatcher to send out emails. **Note:** the email address must be SMTP enabled to work correctly

**Description** (optional): Additional information about the dispatcher

**Dispatcher Type:** Specifies whether the dispatcher is used for Testing, Development, or Production

Using this form, you can enter all the fields manually or you can click the **Search Active Directory** button to search your directory service for a specific dispatcher.

New Dispatcher

Search Active Directory

The dispatcher account is the entry point for a queue. Users can contact this account to connect with agents. This account must be unique.

**Account Settings**

**SIP**

Dispatcher sipuri

**Lync/Skype for Business FE Pool**

sipdir.online.lync.com:443

**Domain**

Dispatcher account domain

**User**

Account Username

**Password**

Password Show

**Chime Settings**

**Description**

**Dispatcher Type**

Testing

Cancel Verify Settings Save

Figure 10: Chime dispatcher settings


In the directory picker, enter a name to search for and press the **Search** button. Chime will search your directory, and return possible matches. To add the dispatcher's information to the New Dispatcher form, click on the + icon to the right of the dispatcher's information in the grid.

Before a dispatcher can be used, Chime must verify that it can log in as the user. To do this, click **Verify Settings** and Chime will verify the settings provided.

Once the connection has been verified, click **Save** to add the dispatcher to Chime.

---

## EDITING A DISPATCHER

To edit a dispatcher's settings click the  icon in the dispatcher grid. This will open a window with the same fields as the New Dispatcher window, but will allow you to edit an existing dispatcher. Make any desired changes, use the **Verify Settings** button and then click **Save** to update the dispatcher.

---

## DELETING A DISPATCHER

If you need to remove a dispatcher from Chime, click the  icon in the dispatcher grid. This will bring up a confirmation window, where you can confirm the removal or cancel. The removal will set the dispatcher as archived, and you can restore a dispatcher at a later point if you need to, or permanently delete them from the database.

## SETTINGS

The settings section is where you will view and configure system settings such as server settings, license keys, default text resources, and language options.

---

## SERVER SETTINGS

**Directory Service** – This section includes the Server Name and Directory Service user. These fields should be pre-filled and they should not be configurable by any user.

**Database Settings** – These fields should be pre-filled and they should not be configurable by any user.

### Email Settings:

- **Send Email Alerts on Critical Failures:** Checking this box will alert all Chime administrators when a queue fails to start, or a license key has expired, causing a queue to go offline.
- **Include [support@instant-tech.com](mailto:support@instant-tech.com):** Checking this box will send the Critical Failure notifications in the setting above to the Instant Tech support team.
- **SMTP Server Address:** Enter SMTP server address, if using an SMTP server.
- **SMTP Server Port:** Enter SMTP server port, if using an SMTP server.
- **SMTP Username + Password:** Enter the SMTP username and password into the appropriate fields, if using an SMTP server.
- **Use SSL?:** Check this option if you require SSL for security purposes.



Figure 11: Server Settings

## LICENSE SETTINGS

If you are using a trial version of Chime, you do not need to manually add a license key. Your trial provides you with a license for one queue and three agents.

If you have received a specific license key for Chime, paste the code into the “License Code” field and click **+ Add License**. Once those license keys have been added, you can apply them to queues in queue settings.

Code	Assigned to Queue	Maximum Agents	Max Alert Recipients	Expires On	Edit
f61ff8ed-957b-435a-a21d-9daf156149ac-32-8d5d252f0174000-bb8	Chime Sales Queue	50	3000	6/15/2018	<a href="#">Edit</a>
f61ff8ed-957b-435a-a21d-9daf156149bc-32-8d5d252f0174000-bb8	Instant Support Queue	50	3000	6/15/2018	<a href="#">Edit</a>
947047ef-45ba-437a-b345-641b12568fc3-3-8d8ad1f0442c000-19	N/A	3	25	12/31/2020	<a href="#">Edit</a>

Figure 12: License Settings

## TEXT SETTINGS

This area is where you will configure default text resources to apply at a global level, if necessary. If you want to edit text resources at a queue level, go to Queue Settings. Additionally this section allows you to set the global Agent tags that can be used for Skill Tag Routing.

## AGENT TAGS

This section is where Agent Tags are added at an administrator level. Once Agent Tags are defined in this section, they can be attached to specific Queues and Agents in the Queue Settings. Chime provides seven Agent Tags examples by default: Hardware, Microsoft Office, Mobility, Operating System, Outlook/Exchange, Password Reset, and Software Installation.

Name	Icon	Delete
Microsoft Office		
Mobility		
Operating System		
Outlook/Exchange		
Password Reset		

Name	Description	Language	Edit	Delete
DefResource	Default Text Resource	English		

Figure 13: Agent Tags

To add more skill tags, you will need to type in the name of the skill tag, add an icon, and click on the + button. The Icon is not mandatory, but can help organize or differentiate different tags. To pick an Icon, simply click the **Add Icon** button and select the icon you want to use from the picker that pops up. Click OK, then the Icon will be assigned to the tag.

Similarly you are able to edit the Icon of an existing Tag by clicking the button next to the Icon you want to change. The Icon picker will open up and allow you to select a new Icon. Click OK, then the Icon will be assigned to the tag.

To delete an existing Agent Tag click the button next to the Tag you wish to delete. You will be prompted if you really want to delete the Tag. Click Delete, and the Tag will be deleted. **Note:** If you delete a Tag, all Suggestions associated with it will be deleted as well.

## TEXT RESOURCES

Text Resources are customizable messages that Chime will use when connecting people via chat. In addition to being customizable, Chime provides system variables that can be used to provide live, up to date, information within those text resources.


Chime comes with default text specified for all of the text resources. There are three different sections of text resources: **Guest Text**, **Expert Text**, and **System Text**.

- The **Guest Text** is where you will find text resources that will be sent to the guests when they encounter any activity within the queue.
- The **Agent Text** section is where you will find text resources that will be sent out to Users within chat sessions who are provisioned in the queue when they accept a chat request.
- The **System Text** section holds the text resources that the queue would send out automatically based on system activity.

The screenshot displays the 'Text Resource Editor' window with a top navigation bar containing 'Server', 'Licenses', 'Text' (selected), 'Theming', 'Web Client', and 'Advanced'. The main area is divided into a left sidebar and a right content pane. The sidebar has three sections: 'Guest Text' (highlighted), 'Agent Text', and 'System Text'. Below these are fields for 'Text Resource Name' (containing 'DefResource'), 'Text Resource Language' (a dropdown menu set to 'English'), and 'Text Resource Description' (containing 'Default Text Resource'). The right pane lists several text resources, each with a text area and a blue edit icon: 'Welcome Message', 'Thank you for contacting (QueueName). The average wait time is (SeekerAverageWaitTime).\n Please wait while I locate an agent for you.', 'Searching For Person', 'Hi (SeekerFirstName), we are currently locating someone to help. Please wait. we will connect you as soon as we can.', 'Connected Message', 'Expert (ExpertFullName) has accepted your request.', 'Timeout Message', 'Unfortunately, no one is available at this time. Please try again later.', 'All Agents Are Busy', 'All experts are currently busy. Please wait. we will connect you as soon as we can.', 'Chat Ended', and '(ExpertFullName) has closed the chat session.' A 'Cancel' button is located in the top right corner of the editor window.

Figure 14: Queue Text Resources

## CUSTOMIZING A TEXT RESOURCE

If you want to edit an existing text resource, start by clicking the  button. The Text Resource Editor will open up and allow you to look at all of the existing Text Resource messages. There is an **Edit** button by each of the messages that you can click to edit the text. The editor provides you with a textbox that you can write in, a list of system variables you can use, and the ability to preview how the formatted text will appear once it is sent.

System Variables are very useful because they allow you to make the resource dynamically change. For example there are System Variables that give queue statistics such as the average wait time in the queue, number of agents in the queue, the position you are in the queue, name of the Guest, name of the Agent, name of the Queue. Each of these Variables would provide up-to-date data for the Agent or Guest when they are in the chat session.

Here is how to use System Variables:

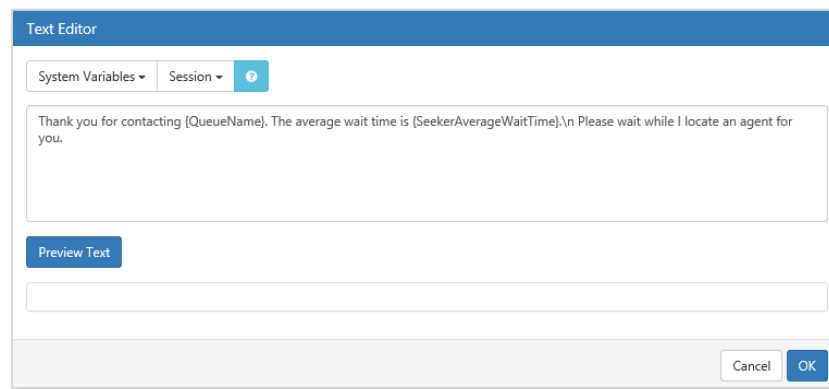


Figure 15: Customizing a Text Resource

1. Enter the text that you want to show for this specific text resource.
2. Click on the **System Variables** menu, if using any system variables.
3. Click **Preview Text** to show a preview of the text resource. The preview will also show an example of the system variables within the text resource.
4. Click **Save** once you are satisfied with the text resource.

**NOTE:** A list of system variables can be seen on our website here- [http://addchime.com/help/2\\_6/system-variables/](http://addchime.com/help/2_6/system-variables/)

## CREATING A NEW TEXT RESOURCE

A default text resource has been provided for you, but if you wish to add a new set, click on the **+ New** button. This will open up a Text Resource Editor. To create a new Resource you need to fill out all required fields shown in the Editor.

Editing the fields is exactly the same as what is written in the Customizing a Text Resource section above. Refer back to this section for a comprehensive overview for writing a text resource.

## THEMING SETTINGS

The Theming tab of the Admin Section is used to customize the look and feel of Chime. The **Branding Options** area allows you to upload an image that will show up in the top left of the page.

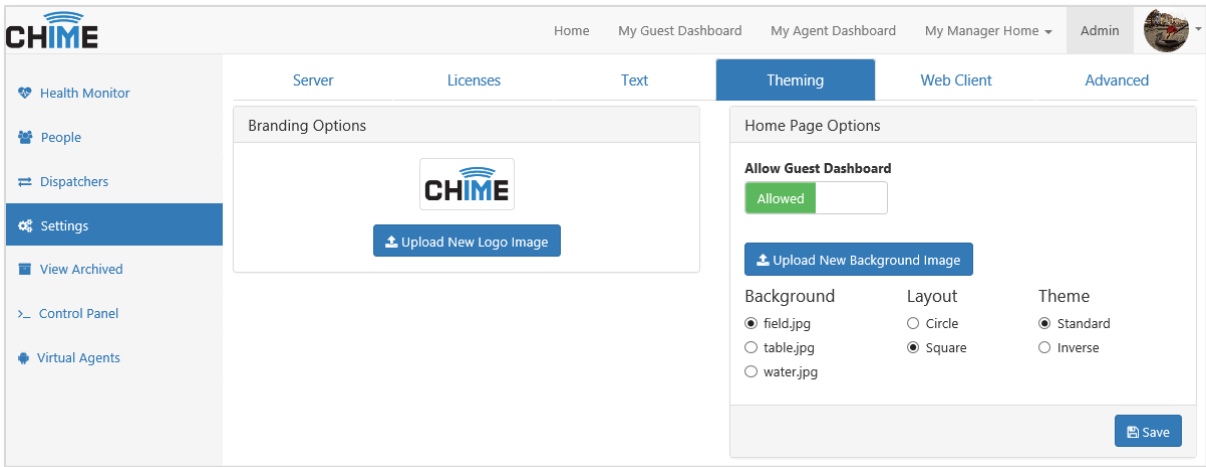


Figure 16: License Settings

The **Home Page Options** allows you to show or hide the Guest Dashboard from users, add in new Background images, and set default image, layout and theme for the Home Page.

## WEB CLIENTS SETTINGS

**Web Clients:** This table displays the web clients that have been configured in the Chime system, and the queues to which they are assigned. You can edit the settings for a web client, or preview how the web client will be rendered using the **Preview** button.

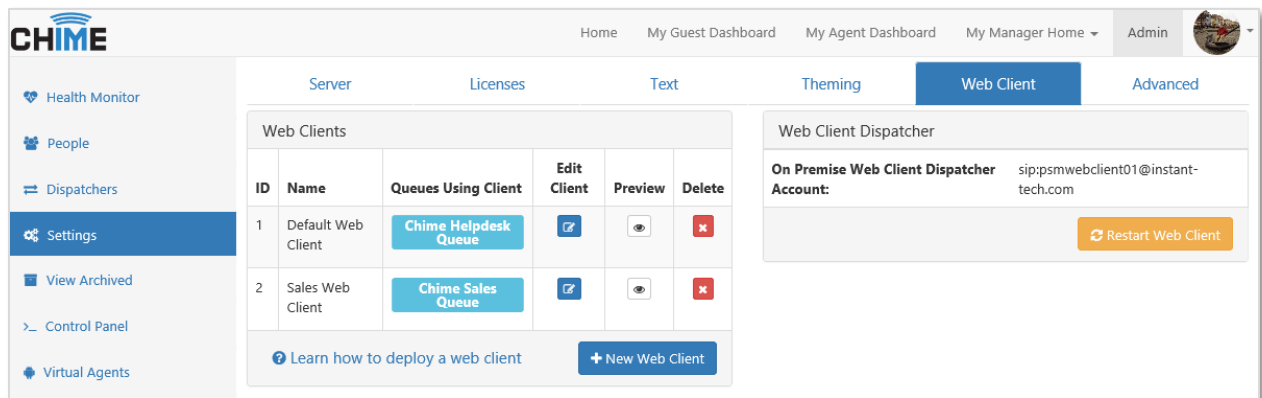


Figure 17: Web Clients

**New/Edit Web Client:** In Chime, you have the ability to configure web client settings, upload brand images, apply custom CSS rules, and create custom pre-chat forms. To begin creating a new Web Client, click the **New Web Client** button. To edit an existing Web Client click on the **Edit Client** button in the row that the Web client is in.

When you click the **New Web Client** button or the **Edit Client** button a new window called **Edit Web Client Settings** will appear below the Web Clients table.

Edit Web Client Settings

Cancel

Details Custom CSS Form Options

Learn about Web Client customization

ID: 1

**Web Client Name:**

Default Web Client

**Webclient Window Page Title**

Chime Webclient

**Web Client Options**

- ☒ Authenticate Web Guest Using Integrated Windows Domain Authentication
- ☒ Enable Guest Rating
- ☒ Enable File Upload
- ☒ Enable Outage Support
- ☒ Show Queue Image
- ☒ Show Agent Image
- ☒ Enable Notification Sound By Default

**CHIME**

Upload Image

Image should be 200x100 px  
Images must be no larger than 1MB

Cancel Save

Figure 18: Web Client Form

There are three different tabs in these settings, **Details**, **Custom CSS** and, **Form Options**.

---

## DETAILS

The Details tab allows you to customize the features you want to implement on the Web Client. Below is a list of all of the features that you can use and how each one functions:

- **Web Client Name:**  
This is the name of the Web Client. It does not show up anywhere for the Guest to see, it is primarily used to label the Web Client for Admins and Managers to identify the Client they are using.
- **Web Client Window Page Title:**  
This field determines what the Guest will see at the top of the window when using the Web Client.
- **Authenticate Web Guest using Integrated Windows Domain Authentication:**  
This setting allows the Web Client form to auto-fill the Guests information into the form if they are logged into their Office 365 or local network windows account.
- **Enable Guest Rating:**  
Checking this setting allows Guests to give a performance rating for the Agent that accepted their chat. The rating is 1 – 5 stars and the ratings will be available to review on the Queue Dashboard. Additionally the Guest will be able to write up a comment about the chat session and the quality of the chat.
- **Enable File Upload:**  
Selecting this setting allows Agents and Guests to send files back and forth over the web client and the Agent Assist App.
- **Enable Outage Support:**  
Checking this setting will cause the Web Client to display a tab with all of the active outages in the Queue that the Guest can look through before starting a chat.
- **Show Queue Image:**  
This setting determines if the Queue image displays in the top left corner of the Web Client.
- **Show Agent Image:**  
This setting determines if the Guest will see the image of the Agent next to their name in the Web Client.
- **Enable Notification Sound by Default:**  
The Web Client supports sound notifications whenever the Guest receives a message. The Guest is able to turn this on or off, but this setting determines whether the notifications are on or off by default.

Additionally, on this page, you are able to set an image for the Web Client. If you selected the Show Queue Image setting, this is the image that will display in the top left of the Web Client when it is in use. Click on the **Upload Image** button and a dialogue box will open up and allow you to select an image to use. Simply select the image you plan to use, then the Image will be uploaded.

**Note:** To keep the changes you must hit save before navigating away from the page.

## CUSTOM CSS

Custom CSS can be entered directly into the text field.

## FORM OPTIONS

The custom form builder can be used to easily generate custom prechat forms. Editing a previously generated form can only be done by editing the HTML markup directly in the **Custom Form Markup** field.

The screenshot shows the 'Chime - Custom Form Builder' interface in a Google Chrome browser. The URL bar shows 'onpretest.instant-tech.com/Chime/Admin/CustomFormBuilder'. The interface has a light blue header with a 'Close' button (red X) and a 'Save' button (green checkmark). Below the header, there is a section titled 'Create your custom prechat form here.' with a subtext 'Press the Save button when done'. A note states: 'When creating a custom form, keep in mind the following IDs that Chime uses to identify and track the Seeker'. Below this note are four rows of information: 'firstName' (identifies the first name), 'lastName' (identifies the last name), 'email' (identifies the email address), and 'question' (identifies the question associated with the session). The main area is divided into two sections: 'Your Form' on the left and 'Drag & Drop components' on the right. The 'Your Form' section contains a text area with the placeholder text 'In order to better serve you, please provide us with the following information'. The 'Drag & Drop components' section has tabs for 'Input', 'Radios / Checkboxes', 'Select', and 'Rendered'. Under the 'Input' tab, there are seven components: 'Text Input' (placeholder, help), 'Password Input' (placeholder, help), 'Search Input' (placeholder, help), 'Prepended Text' (prepend, placeholder, help), 'Appended Text' (placeholder, append, help), 'Prepended Checkbox' (checkbox, placeholder, help), and 'Appended Checkbox' (placeholder, checkbox).

Figure 19: Custom Form Builder

**Web Client Dispatchers:** This section displays the configured dispatchers and allows you to restart the web client dispatcher process. You should only restart the web client if chats cannot be routed through the web client. Restarting the web client will disconnect any active chat sessions. To restart, click the **Restart Web Client** button. You should receive a notification that the restart was successful.



## ADVANCED SETTINGS

**Languages:** The language section gives you the option to add a new language label. To add a new language label, type in the name of the language in the 'New Language' field. Click Add Language. If the language is created with "Left to Right" selected, the text will be displayed from the left of the screen to the right. If the language is created with "Right to Left" selected, the text will be displayed from the right of the screen to the left.

Note: This does not provide the ability to translate chat text. It is simply a label for the queue.

The screenshot displays the CHIME Web Client interface. The top navigation bar includes links for Home, My Guest Dashboard, My Agent Dashboard, My Manager Home, and Admin. The left sidebar contains links for Health Monitor, People, Dispatchers, Settings (highlighted), View Archived, Control Panel, and Virtual Agents. The main content area is divided into two panels. The left panel, titled 'Languages', features an 'Add Language' section with a text input for 'Language name...', a dropdown for 'Left to Right', and a '+' button. Below this are buttons for various languages: Arabic, Cyrillic - Any, English, French, German, Hebrew, Hindi, Italian, Mandarin, and Spanish. The right panel, titled 'Logging Options', contains several toggle switches: Diagnostic SQL Logging (Off), Diagnostic HTTP Logging (Off), Diagnostic SignalR Logging (Off), Diagnostic Chat Routing Logging (ON), Diagnostic UCWA Logging (Off), Log File Purging (Off), and Number of Days To Retain Log Files (30). A 'Save' button is at the bottom of this panel. The rightmost panel, titled 'ChimeHub Settings', shows 'ChimeHub Connection Status' as 'Not Connected', 'ChimeHub Root Url' as 'https://chimehub.com/', and 'Engine ID' as an empty field. A 'Check Engine ID' button is present. Below this is the 'Alert Settings' section, which includes 'Number Of Concurrent Tasks Allowed' set to 3 and a 'Save' button.

Figure 20: Web Client Form

**ChimeHub Settings:** ChimeHub allows you to stage click to chat links on external web pages so that customers and end users can initiate chats with the queue. In this section you can register with ChimeHub. To configure ChimeHub, fill out the following fields:

- **ChimeHub Root URL:** Enter the URL for ChimeHub
  - **Engine ID:** Enter an identifier for the ChimeHub instance
1. Click on **Check Engine ID** to check whether the ID you requested is available. Pick another ID if the one entered is not available.
  2. Once you obtain an available Engine ID, enter in the information for your Organization's name as well as an email address you can be contacted at.
  3. Click on **Request Activation**. You can start using ChimeHub once the request has been approved.

**Logging Options:** The Logging Options section of the Advanced page allow you to customize the amount and detail of logging that Chime provides. While none of these settings are required for Chime to run correctly, Instant-tech may ask you to enable some of these logging options when trying to troubleshoot an issue on the Chime server. **Note:** Enabling these logging options will make the log files larger in size. Leave the options off if you wish to reduce the amount of memory the log files take up on the server.

- **Diagnostic SQL Logging:**  
This setting will add in additional logging around SQL actions that are taking place in Chime.
- **Diagnostic HTTP Logging:**  
Selecting this setting will add in extra logging for Http behavior that are taking place in Chime.
- **Diagnostic SignalR Logging:**  
Enabling this setting includes extra logging on SignalR behavior in Chime.
- **Diagnostic Chat Routing Logging:**  
This setting will include additional logging information on the routing process of Guests in Chime.
- **Diagnostic UCWA Logging:**  
This setting will add in extra logging for UCWA connections between Agents and the Skype for Business/ Lync server. **Note:** This setting will only work on Office365 deployments of Chime.
- **Log File Purging:**  
Enabling this setting will allow you to specify the amount of time you want to keep log files on the Chime server. By default, all log files are saved, enabling this option saves storage space on the server.

**Alert Settings:** The Alert Settings on the Advanced page allow the user to control the amount of stress the server will be under when sending out alerts. The numbering system ranges from 1 to 8 (and an option of 'no limit') and will control the amount of stress the server is under when sending out alerts. **Note:** the system takes into account how much computing power the server has. For example a low-end server would use 2 or 3 to have processor usage around 50%, while a high-end server could run at 5 or 6 and have processor usage at 50% as well.

**Dashboard Settings:** The Dashboard Settings section allows the user to configure the Dashboard Refresh Interval setting. This setting controls the interval at which the queue dashboards will refresh automatically. By default the dashboard is set to a 60 second refresh, but it can be changed to be higher based on preference. **Note:** significantly lowering the refresh interval has been known to cause some browsers to crash if left on a page that is constantly refreshing for a few hours.

## VIEW ARCHIVED

This section is where archived Queues, Chime users, Dispatchers, and Virtual Agents are listed. To restore an archived Queue, an archived person (People), an archived Dispatcher, or an archived Virtual Agent, click on the **Restore** button on the right side of the grid. People and dispatchers have the ability to be permanently deleted from the database.

## CONTROL PANEL

The control panel provides a quick glance view of Queues, their associated processes, and their status. The control panel is a great tool to quickly assess possible reasons for queue unavailability. It is an efficient way to see if processes are started, and then investigate reasons why they might be behaving undesirably. All of these pieces of information have proved useful to the support team and aide Instant Technologies in providing the best support possible. Not all types of entities represented in the Control Panel require information from each column, but in either case, where the column is not provided or is missing, a dash is shown. Three types of items are displayed in the control panel, Office 365 Queues, Office 365 Web Clients, and On-Premise Queues.

### 1. Office 365 Queues

Queue Control Panel							
Queue Name	Type	Dispatcher	LyncOnlineQueue.exe PID	LyncOnlineQueue.exe Memory	LyncOnlineQueue.exe User	Status	Action
Help Desk	Office 365 Lync	qadispatch02	5176	717564 K	INSTANT-TECH\svc_chime	Started	Stop
Alerting Queue	Office 365 Lync	qadispatch01	752	88896 K	INSTANT-TECH\svc_chime	Started	Stop
Worldwide Queue	Office 365 Lync	qaDispatch03	-	-		Terminated	Start
							Refresh List

Figure 21: Control Panel

The Office 365 Queues, when running correctly, display the most information out of all the types of Chime entities represented in the Control Panel. The first important information provided by the control panel is the list of active Queue names, the type, and the Dispatcher name. The above screen shots show two Office 365 Queues, Alerts Queue and TestDesk. The first is disabled and the second is enabled. Notice the difference in their status, Alerts Queue is Terminated and TestDesk is Started. Likewise, they each have different available actions, Start and Stop. This high-level status report is the second important information provided by the control panel. Lastly, the Control Panel exposes underlying dependencies and their statuses. Office 365 Queues run on a separate process called a LyncOnlineQueue.exe, it requires a Lync.exe and the two columns displaying their process ID (or PID) quickly identify if those are running or not. Next, the Lync.exe Memory column shows the Lync client process' current memory usage, and lastly, the Lync.exe User column displays under what account the Lync.exe is running.

## 2. Office 365 Web Clients

Office 365 Webclient	Office 365 Webclient	qaweb	-	468	60852 K	INSTANT-TECH\svc_chime	Started	
----------------------	----------------------	-------	---	-----	---------	------------------------	---------	--

Figure 22: Office 365 Web Clients

Office 365 Web Clients are represented in the Control Panel with the name and type Office 365 Web Client. When they are running correctly, and a sufficient amount of time after startup, the Dispatcher column, Lync.exe PID, Lync.exe Memory, and Lync.exe User columns should be displayed. The Dispatcher column displays the Skype for Business username that the client is signed-in as. Office 365 Web Clients run as a separate process, so that process information is displayed in the three Lync.exe columns discussed.

## 3. On-Premise Queues

Testing Queue	Lync	itdispatcher02	-	-	-		Started	Stop
---------------	------	----------------	---	---	---	--	---------	------

Figure 23: On-Premise Queues

On-premise Queues run within the main Chime process. For this reason when they are started, there is no information in the LyncOnlineQueue.exe nor Lync.exe columns. The Dispatcher column should display the Skype for Business username of the Queue's dispatcher.

## VIRTUAL AGENTS

Virtual Agents are Chime's solution to integration. They are optional components for the functionality of Chime, but they are designed to enhance the efficiency and experience of agents or experts within the Queue. Briefly, a Virtual Agent is a DLL or C# file within Chime's Plugins directory that has at least one public class that implements the IVirtualAgent interface of Chime's ExtensionLibrary.DLL. For more information on how to develop a Virtual Agent, deploying virtual agents, or for out-of-the-box integration samples, explore the Virtual Agent SDK documentation under Virtual Agent SDK\ProjectInfo.

This text will explain the functionality of the Virtual Agent sub-section of the Admin section. Virtual Agents have two levels of system-wide control. The first is the global setting for Virtual Agents. When the global setting is off, the Virtual Agents section will appear as below:

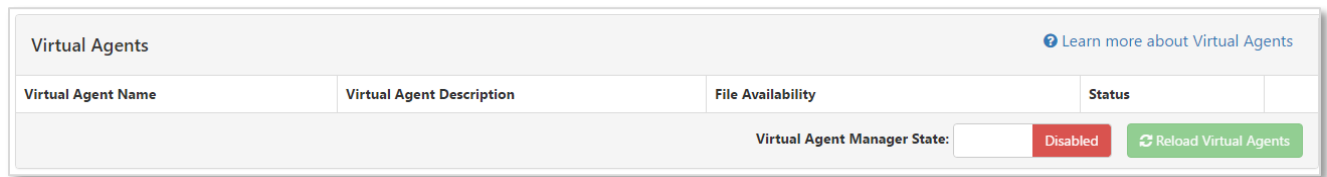


Figure 24: Virtual Agents Manager

No virtual agents are shown and the toggle button on the bottom right says **Disabled**. This means the Virtual Agent Manager is off, and all Virtual Agents currently assigned to any Queues are also off.

To turn on the global setting for Virtual Agents, press the **Disabled** button to turn to **Enabled**. This will turn on the virtual agents that are assigned to Queues, if they load correctly. A spinner will appear while they load, and a dialog box will appear when they are finished signifying success or an error message.



Figure 25: Enabling Virtual Agent Manager

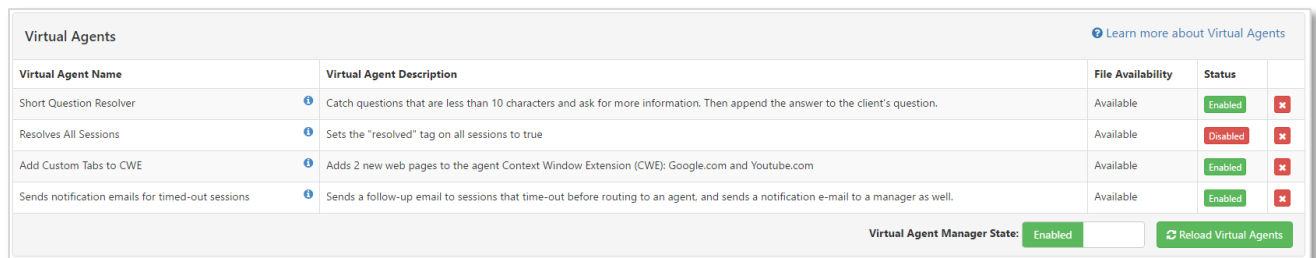


Figure 26: Virtual Agents

At any time, if a new Virtual Agent is added to the Plugin directory, the green **Reload Virtual Agents** button can be pressed to discover and load new virtual agents into the table.

When the global setting is turned on, notice the that button on the bottom left has turned green and is labeled **ON**, and also a list of virtual agents that are in the database are displayed. Each row displays the Virtual Agent Name, Description, File Availability, and Status. Further information can be displayed for each Virtual Agent by pressing the Information button 'i' next to each Name.

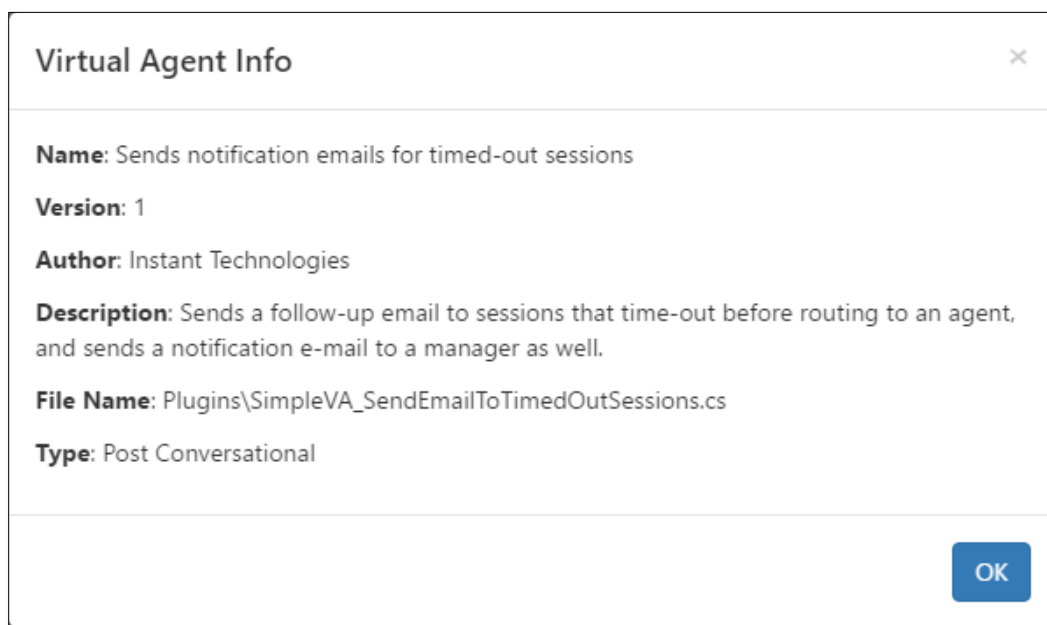


Figure 27: Virtual Agent Info

If a Virtual Agent is in the database and it is not found when it is loaded, the File Availability column will be *Not Found* and the Status will be set to **Disabled**. Likewise, if a virtual agent is found by Chime but it does not load successfully, the Status will be set to **Disabled**. Virtual Agents can be Archived by pressing the 'X' button.

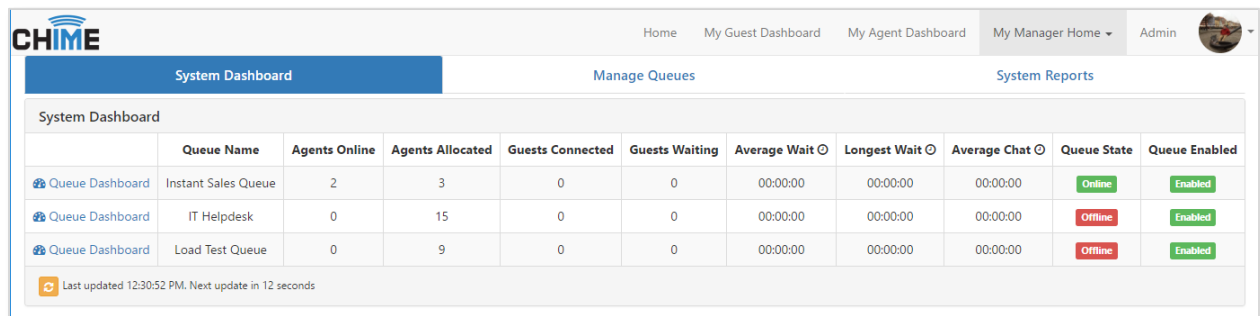
The second level of system-wide control for virtual agents has already been covered, it is the Enabled or Disabled Status. When a virtual agent is **Disabled** it is 'turned off' for any Queues it is assigned to, and when it is **Enabled**, it will be 'turned on'.

## MY MANAGER HOME

My Manager Home page is where you can add, edit, and remove queues within Chime. When you open the Queues page, Chime displays the queues you have provisioned, as well as some high level information.

## SYSTEM DASHBOARD

The System Dashboard page is where you can view information on all of your queues at once, such as the number of agents online, average wait time for a guest, or the queue states. There is also a page called Reports, which shows the Charts and Metrics options for every queue over a certain period of time.



The screenshot shows the CHIME System Dashboard. At the top, there's a navigation bar with links: Home, My Guest Dashboard, My Agent Dashboard, My Manager Home (selected), and Admin. Below the navigation bar, there are three tabs: System Dashboard (selected), Manage Queues, and System Reports. The main content area displays a table titled 'System Dashboard' with the following data:

	Queue Name	Agents Online	Agents Allocated	Guests Connected	Guests Waiting	Average Wait ⌚	Longest Wait ⌚	Average Chat ⌚	Queue State	Queue Enabled
<a href="#">Queue Dashboard</a>	Instant Sales Queue	2	3	0	0	00:00:00	00:00:00	00:00:00	Online	Enabled
<a href="#">Queue Dashboard</a>	IT Helpdesk	0	15	0	0	00:00:00	00:00:00	00:00:00	Offline	Enabled
<a href="#">Queue Dashboard</a>	Load Test Queue	0	9	0	0	00:00:00	00:00:00	00:00:00	Offline	Enabled

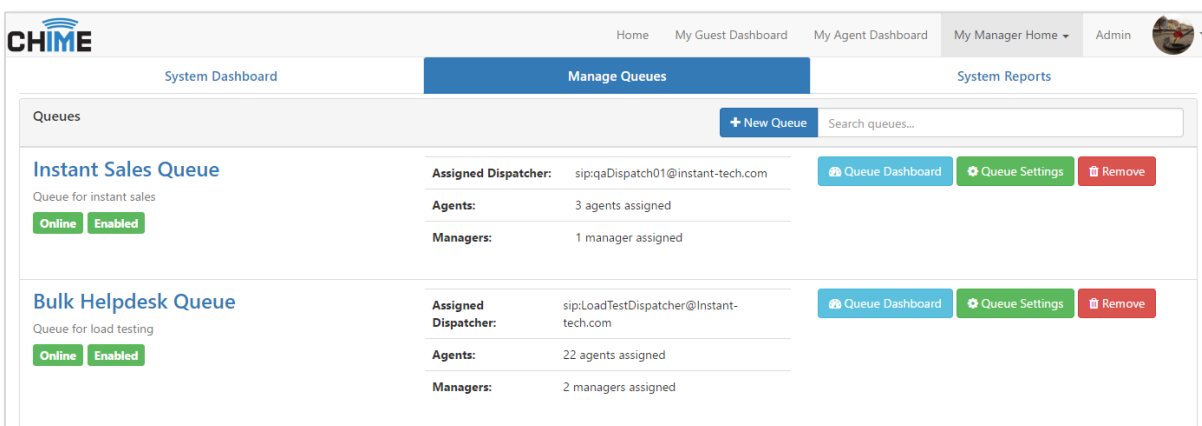
At the bottom of the table, it says: Last updated 12:30:52 PM. Next update in 12 seconds.

Figure 28: System Dashboard

## MANAGE QUEUES

The Manage Queues page is where you can add, edit, and remove queues from Chime. When navigating to the Manage Queues page, Chime displays all queues that have been provisioned, as well as some high level information about each queue. This page allows you to access Queue Settings and the Queue Dashboard of any queue that you are provisioned a Manager or a Reviewer in.

**Note: Admins are able to access all queues (even if they have not been added into the queue) and are the only users that are able to delete queues.**



The screenshot shows the CHIME Manage Queues page. At the top, there's a navigation bar with links: Home, My Guest Dashboard, My Agent Dashboard, My Manager Home (selected), and Admin. Below the navigation bar, there are three tabs: System Dashboard, Manage Queues (selected), and System Reports. The main content area displays a list of queues. At the top, there's a '+ New Queue' button and a search bar labeled 'Search queues...'. Below this, there are two queue entries:

Queues	Assigned Dispatcher:	Agents:	Managers:	Queue Dashboard	Queue Settings	Remove
<b>Instant Sales Queue</b> Queue for instant sales <b>Online</b> <b>Enabled</b>	sip:qaDispatch01@instant-tech.com	3 agents assigned	1 manager assigned	<a href="#">Queue Dashboard</a>	<a href="#">Queue Settings</a>	<a href="#">Remove</a>
<b>Bulk Helpdesk Queue</b> Queue for load testing <b>Online</b> <b>Enabled</b>	sip:LoadTestDispatcher@Instant-tech.com	22 agents assigned	2 managers assigned	<a href="#">Queue Dashboard</a>	<a href="#">Queue Settings</a>	<a href="#">Remove</a>

Figure 29: Manage Queues

## SYSTEM REPORTS

System Reports is the section of My Manager Home that you are able to look at the charts and metrics for all of the Queues you are a manager for. The System Reports section allows a manager to have a comprehensive look at all of the data for the queue. To view all of the available charts and reports on Chime, go to our website here: <http://addchime.com/all-charts-and-reports.html>

**Note: Admins will see statistics for all of the Chime queues while Managers will only see statistics for the queues that they are a manager in.**

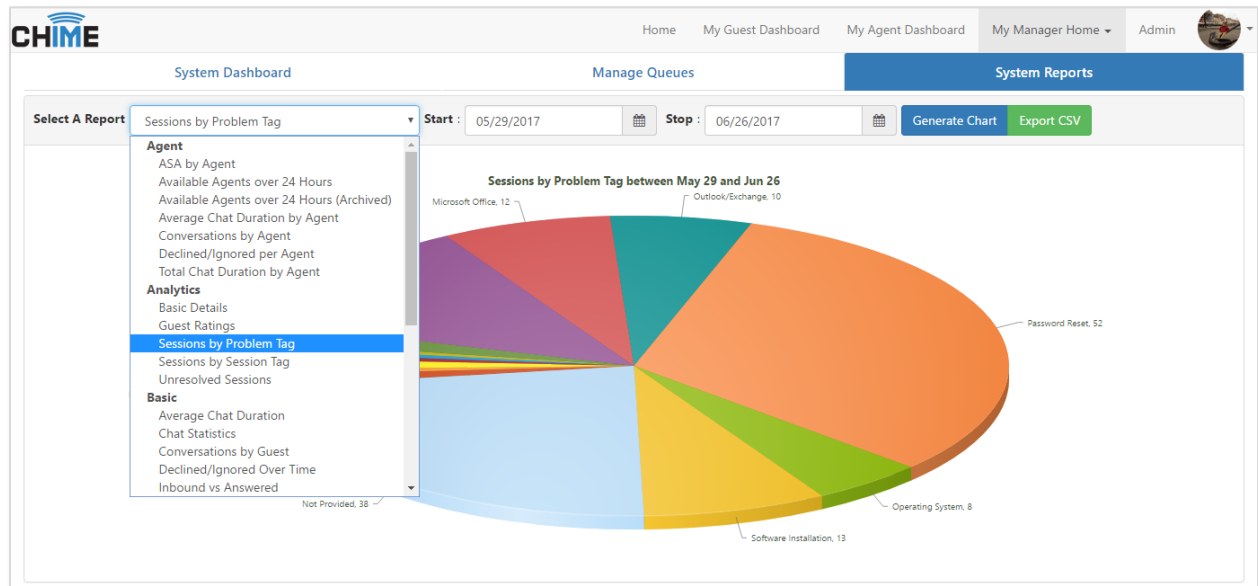


Figure 30: System Reports

## ADDING A QUEUE

To add a queue, first navigate to Manage Queues section. Next, click the **+ New Queue** button below the grid. This will bring up the new queue window, where you will provide the basic information needed to create a queue.


**Name:** A name for this queue. This name will be used in system dashboards, and will be displayed to users when they enter the queue

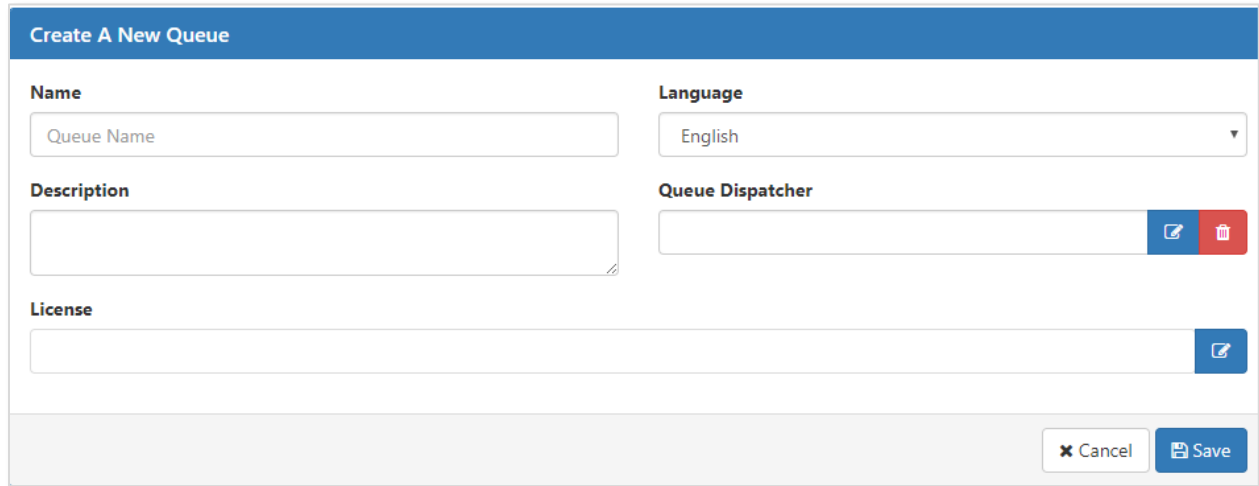
**Description:** A more specific description of the queue, if needed

**Language:** Marks the queue as being associated with a specific language (English is default)

**License:** Select a license key that the queue will use



You must also select a dispatcher that this queue will use as the connecting point for chat sessions. Click **Select Dispatcher** to display a list of available dispatchers that can be used for the queue. Clicking the  icon will select that dispatcher for use with the queue you are editing.



The image shows a 'Create A New Queue' dialog box. It has a blue header bar with the title 'Create A New Queue'. Below the header, there are four main sections: 'Name' with a text input field containing 'Queue Name'; 'Language' with a dropdown menu showing 'English'; 'Description' with a text area; and 'Queue Dispatcher' with a text field and a blue edit icon. Below these is a 'License' section with a text field and a blue edit icon. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

Figure 31: New Queue Settings

Click **Save** to create the new Queue

## EDITING A QUEUE

After creating a queue, you will need to provide some additional properties to enable the queue. To edit a queue, up the click the **Edit** icon for the queue in the queue grid. This will open queue settings window.

Queue Settings is the backbone of how the queue runs. All settings tied to operation of the queue can be found in the Queue Settings as well as the people who operate the queue. The Queue Settings is divided into seven different sections to make it easier to manage all of the settings: *Basic*, *People*, *Virtual Agents*, *Text Resources*, *Routing*, *Schedule*, and *Advanced*.

## BASIC

In this section, Managers and Admins can edit the high-level queue properties:

The screenshot shows the 'Queue Settings' interface with the 'Basic' tab selected. The interface is organized into two main columns: 'Queue Properties' and 'Engine Properties'.  
**Queue Properties:**  
- **Name:** A text input field containing 'Chime Helpdesk Queue'.  
- **Description:** A text input field containing 'Queue for testing the new transfer feature'.  
- **Language:** A dropdown menu set to 'English'.  
- **Web Client:** A dropdown menu set to 'Default Web Client'.  
- **Send Chat Transcripts Via Email:** A toggle switch set to 'Off'.  
- **Publish To Home Page:** A dropdown menu set to 'Published'.  
- **Show Chat Links On Home Page:** A dropdown menu set to 'Both'.  
**Engine Properties:**  
- A yellow warning box states: 'Changes to these settings may cause the queue to restart. Any active sessions may be dropped.'  
- **License:** A field showing 'Licensed for 50 users until 6/15/2018 | Alerting enabled for 3000 recipients'.  
- **Queue Dispatcher:** A text input field containing 'sip:psmdispatcher02@instant-tech.com'.  
- **Queue State:** A dropdown menu set to 'Running'.  
- **Restart The Queue:** An orange button labeled 'Restart'.  
At the bottom of the interface are four buttons: 'Queue Dashboard', 'Manage Queues', 'Reset', and 'Save'.

Figure 32: Editing a Queue

- **Name:** A name for this queue. This name will be used in system dashboards, and will be displayed to users when they enter the queue.
- **Description:** A brief description of what the queue is for
- **License:** Determines the number of Agents per queue
- **Language:** Select the language of the queue. **Note: this does not affect the UI in any way, it is primarily for labeling different language queues**
- **Web Client:** Select the appropriate web client to use for the chats that come into the queue
- **Queue Dispatcher:** Every queue needs a dispatcher to send messages back and forth from Agents and Guests or to send out alerts from the queue. This field allows you to add a dispatcher, change a dispatcher, or remove one all together
- **Send Chat Transcript Via Email:** Sends the Guest their conversation after the chat is finished when "On" when "Off" it does not send
- **Publish To Home Page:** Makes the queue visible to Guests on the Home Page when "Published" is selected, "Hidden" makes it not visible to Guests on the Home Page
- **Queue State:** Determines if the queue is running or stopped

- **Show Chat Links on Home Page:** When “Skype for Business Only” is selected the Guest is given the option to chat over Skype for Business, when “Web Client Only” is selected gives the Guest the ability to chat over the Web Client. If “both” is selected bot appear on the Home Page and if “none” is selected neither is shown on the Home Page.

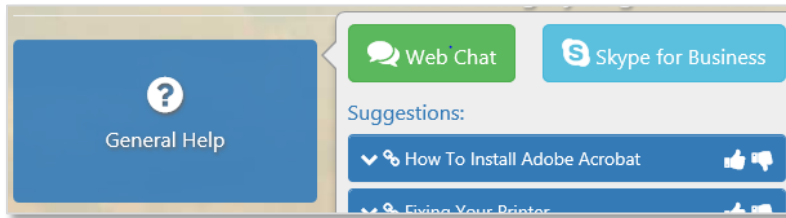


Figure 33: Show Chat Links on Home Page- Both

- **Restart the Queue:** If the Queue needs to be restarted this button provides an easy way to restart it. **Note: If the Queue is restarted all active chat sessions will be ended**

## PEOPLE

The People section of Queue Settings is used to manage the different users that are a part of the Queue. From here you can add in users, change their role in the queue, add or remove tags, change their chat priority, and determine if they are allowed to receive chat requests.

## ADDING USERS

You can add people to the queue by clicking on the **Add Users** button. This will open a picker that allows you to search through all of the people provisioned within Chime. To select users to add:

- Click the + icon next to their account name. Selecting a user will add them to the list on the right side of the window
- You can select multiple users to add, and clicking the X next to a user's name in their badge will remove them from the list of users to add
- Once you are done selecting users, click **Add Users to Queue**, and they will instantly be added to the queue

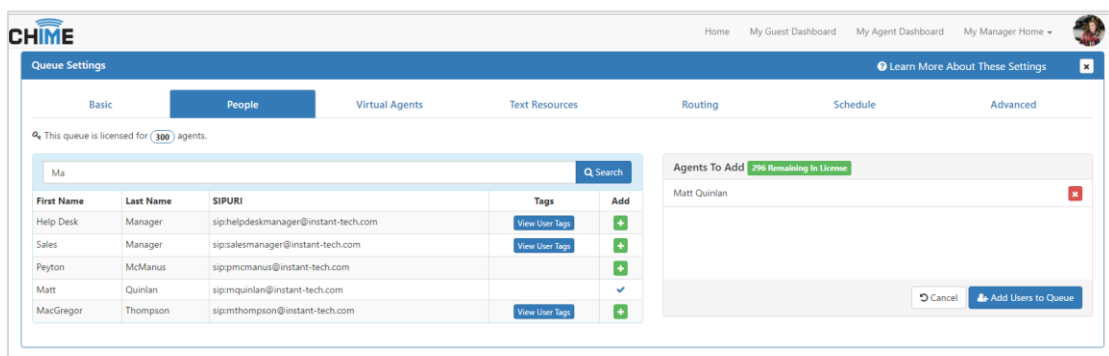


Figure 34: Adding Agents

## EDITING USERS

After adding Users to the queues, users can modify them by changing their role in the queue, adding or removing tags, changing their chat priority, and determining if they are allowed to receive chat requests.

## DETERMINING ROLES

Once a User has been added to the Queue, they can be assigned a User Role. There are three different roles for queues that can be selected in the Role column:

**Manager:** Setting a person as a Manager allows that person to edit queue settings and view the queue dashboard and reports. A Manager has all of the capability of a reviewer, and an Agent, but also has the ability to modify the queue properties and add/remove people from the queue.

**Reviewer:** Setting a person as a Reviewer allows that person to view the queue dashboard and reports, but not change any settings or properties. A reviewer has all of the functionality of an Agent (can accept chats if required), but can also review chats and reports across an entire queue.

**Agent:** An Agent is a person who receives the chats sent out by a guest. The amount of Agents a queue can have is determined by that queue's license key. In order for a queue to receive and accept a chat, there must be at least one Agent (Reviewer, or Manager) online to receive it. Agents are not able to view the queue dashboard, reports, or change any settings and properties.

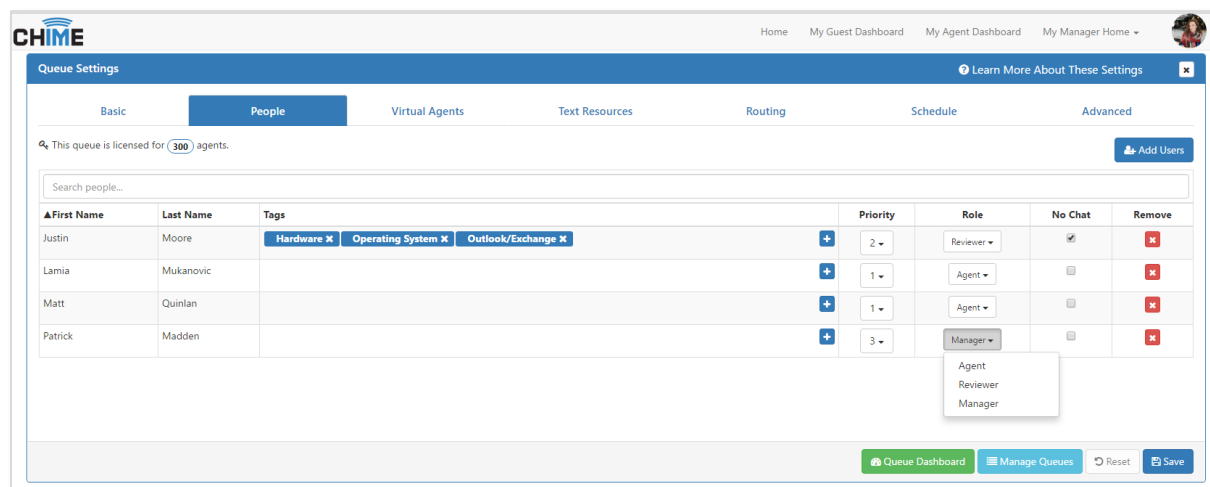


Figure 35: Determining Roles

By default, when a User is added into the Queue they will be assigned the Agent role. This is because most of the Users being added into the Queue will be Agents and will not be assigned to a higher role. After assigning roles to Users, you must click the **Save** button to avoid losing any changes you made.

## TAGS

Tags are used to make specific customer problems go to specific Users that share the Tag associated to their issue. In most Adding Tags to Users allows them to be grouped together according to the customer problems. Managers are able to add Tags for Users by clicking the + button in the **Tags** column.

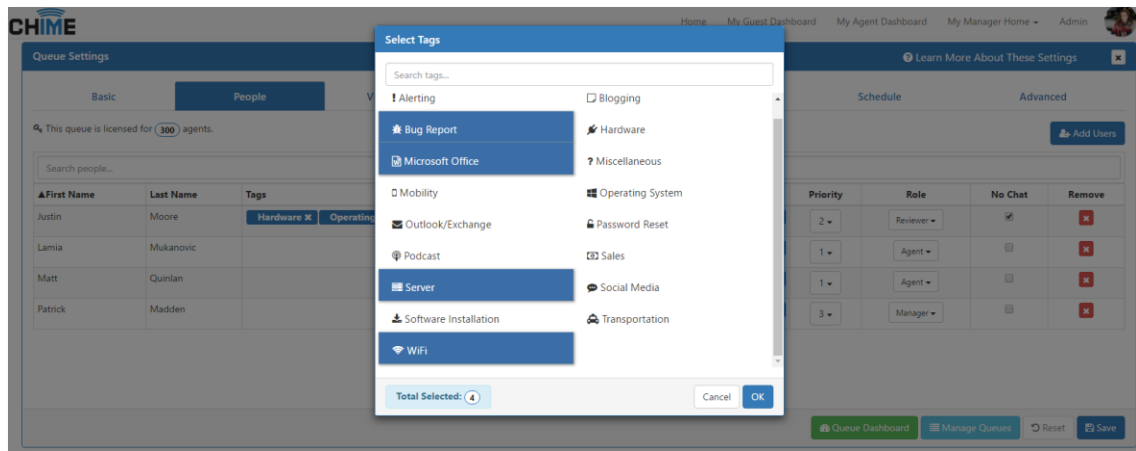


Figure 36: Adding Skill Tags

Pick the Tags that you want to assign to the Users from the list of Tags that display in the window that pops up on the screen. When done picking Tags, simply click OK, and the tags will be added to the User

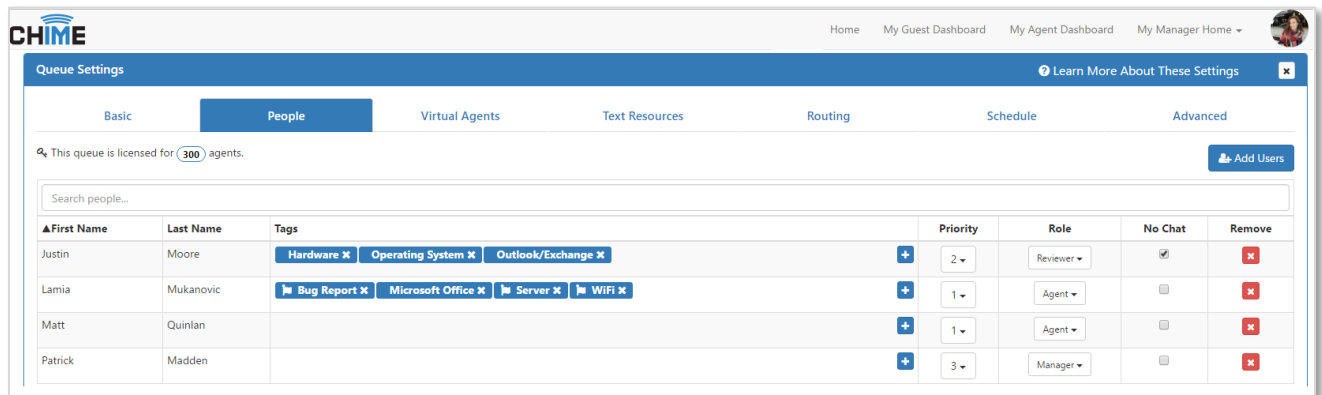


Figure 37: Skill Tags Added Figure

To delete a Tag that has been assigned to a User, simply click the X on the Tag that is associated with the User.

## PRIORITY

After adding Users to the queue, the priority level can be determined. The priority feature determines which Users receive chats first. Priority 1 has the highest priority and 3 is the lowest. For example, if chats are coming into the Queue and two agents are online, one with a priority of 1 and the other assigned a priority of 2, the User with priority 1 will receive all of the chats. The user with priority of 2 will only receive a chat when the first user is unavailable.

---

## NO CHAT

The No Chat feature allows Managers to determine whether or not a user will be receiving chats. This is quite useful because often times Managers and Reviewers do not receive chats at any point in time, so the No Chat option allows them to never receive chats.

---

## REMOVING USERS

If a User needs to be removed from the Queue, simply click the X button on the very right of the row the User is on. Chime will ask you to confirm if you want to remove the User. Click **Remove** to remove the user from the Queue.

## VIRTUAL AGENTS

Virtual Agents are available in three areas, PreChat, Conversational, and Post Conversational. These three areas can be customized per request.

1. **Pre-Conversation (PreChat)** - This is the first event hook that can call a Virtual Agent. One classic example is a Virtual Agent that performs a pre-conversation lookup for the guest and automatically creates an incident record in an external CRM system.
2. **Conversational** - This is the second event hook. It is meant for Virtual Agents that exchange messages with the guest. For example, a conversational Virtual Agent might perform an interview with the guest to determine their location and ask them to look at Knowledge Base articles related to their problem area. If a conversational Virtual Agent doesn't deflect the guest they will route to a live agent after this event.
3. **Post-Conversation** - This is the final event hook for a Virtual Agent. It is fired after the Chime session is ended by either the guest or agent closing their IM window. A simple post-conversation Virtual Agent could update an incident record in an external CRM system with the chat messages and session meta-data from Chime.

Virtual Agents are an optional feature of Chime and the Virtual Agent Tab will only show up in the Queue Settings if an Admin User has enabled Virtual Agents for use. To read more about virtual agents, visit our website at <http://addchime.com/virtual-agents.html>

## TEXT RESOURCES

Text Resources are customizable messages that Chime will use when connecting people via chat. In addition to being customizable, Chime provides system variables that can be used to provide live, up to date information within those text resources.

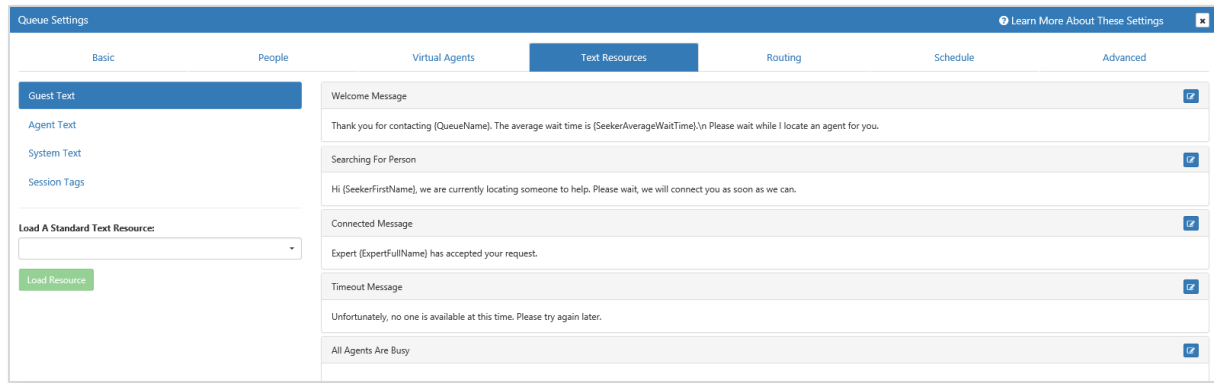


Figure 38: Queue Text Resources

Chime comes with default text specified for all of the text resources. There are three different sections of text resources: **Guest Text**, **Expert Text**, and **System Text**.

- The **Guest Text** is where you will find text resources that will be sent to the guests when they encounter any activity within the queue.
- The **Agent Text** is what Users who are provisioned in the queue will see within chat sessions.
- The **System Text** section holds the text resources that the queue would send out automatically based on system activity.

Chime also gives you the ability to apply Standard Text Resources to a queue. Instead of using the text resources that are provided, you can choose a Text Resource created by Admin Users. To use a standard resource in a queue, pick the desired standard text resource from the drop-down list, called **Load A Standard Text Resource** and click **Load Resource**. The appropriate text resources will be applied for all options. After editing any resources, you must click **Save** to apply the changes.

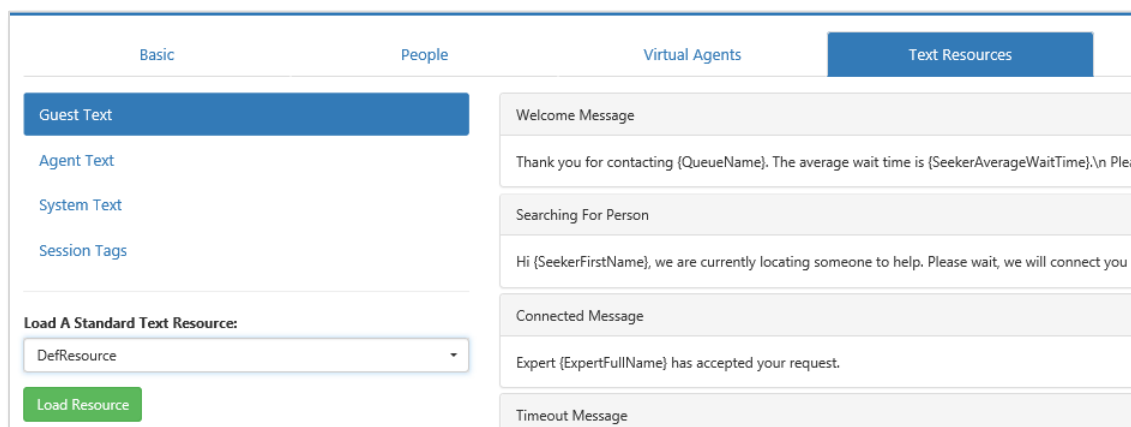


Figure 39: Apply Standard Text Resources

---

## CUSTOMIZING A TEXT RESOURCE

The text resource editor provides you with a list of system variables you can use, and the ability to preview what the formatted text will appear as once it is sent.

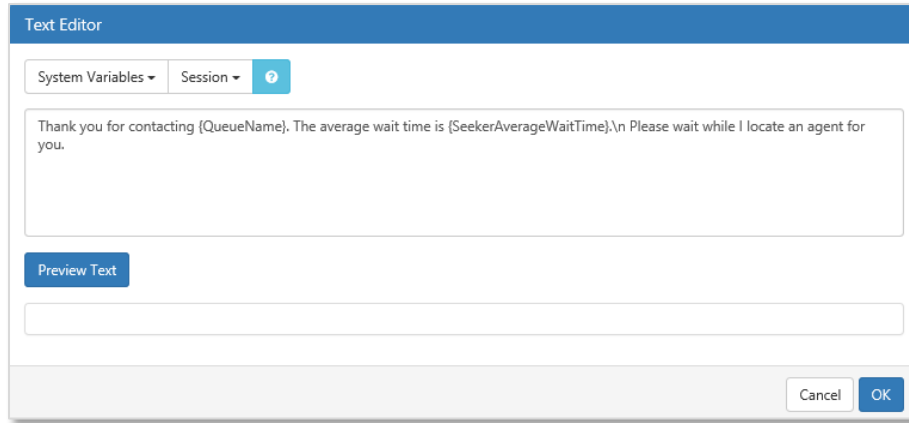



Figure 40: Customizing a Text Resource

5. Click the  icon to edit a specific text resource. This will open the Text Editor modal.
6. Enter the text that you want to show for this specific text resource.
7. Click on the **System Variables** menu, if using any system variables.
8. Click **Preview Text** to show a preview of the text resource. The preview will also show an example of the system variables within the text resource.
9. Click **Save** once you are satisfied with the text resource.

---

## SESSION TAGS

Session tags allow you to attach certain keywords to specific chats. Session tags are created at a queue level and agents can use session tags within chats in the Agent Context Window.

---

### ADD A NEW SESSION TAG

1. Go to **Queue Settings**, then go to **Text Resources**, and click on the **Session Tags** tab within Text Resources.
2. Type in the name of the session tag you wish to create, and click on the + button. The session tag will immediately be added to the existing list of tags.

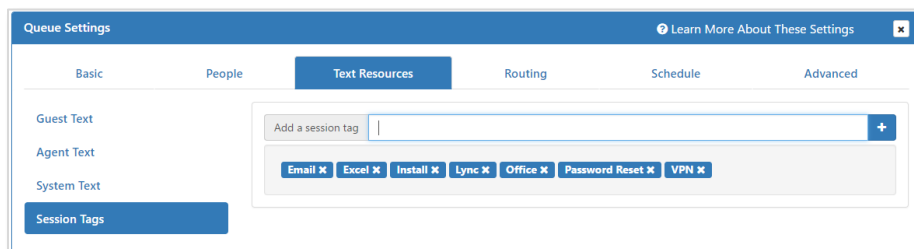


Figure 41: Customizing a Text Resource



## ROUTING

The Routing Method is how Chime dispatches chat requests across Agents in a queue. There are four routing methods: Hunt, Skill Best-Match Hunt, Longest Idle Hunt, and Broadcast. A queue can have only one routing method setting, but this can be changed at any time under the routing tab in queue settings.

The screenshot shows the 'Queue Settings' interface with the 'Routing' tab selected. The interface includes a top navigation bar with tabs: Basic, People, Virtual Agents, Text Resources, Routing (active), Schedule, and Advanced. A 'Learn More About These Settings' link is in the top right. The 'Routing' section contains two columns of settings. The left column, under 'Select Routing Type', includes a 'Routing Method' dropdown set to 'Hunt', a 'Route By Priority?' checkbox set to 'Yes', an 'Always Route Guests In Order Of Arrival?' checkbox set to 'Yes', and an 'Accept Timeout (Seconds)' input field set to '30' (with a default of 30). The right column, under 'Guest Options', includes a 'Guest Timeout (Seconds)' input field set to '40' (with a default of 5 minutes/300 seconds), a 'Guest Update Interval (Seconds)' input field set to '5' (with a default of 10 seconds), and a 'Rollover Queue' dropdown set to 'None'. At the bottom right, there are buttons for 'Queue Dashboard', 'Manage Queues', 'Reset', and 'Save'.

Figure 42: Routing tab in Queue Settings

## STEPS BEFORE ROUTING

For all of the routing methods, Chime takes the following steps:

1. Get a list of all the Agents assigned in the queue
2. Of the Agents assigned in the queue, note which Agents have an Available Lync/Skype for Business status
3. Of the available Agents, note which Agents are **not** at their **Maximum Concurrent** chat limit
4. Of the “not maxed-out right now” Agents, note which Agents are **not** at their **Maximum Chats Per Day** limit
5. Of the “not maxed-out for the day” Agents, note which Agents are **not in the excluded list**. The excluded list is made up of Agents that have declined this chat session already, are set to “No Chats” in queue settings, or have disabled themselves from the queue
6. After we get the list of Agents that meet the above criteria, we then use the queue’s routing method to pick an Agent to rout the chat to

## ROUTING METHODS

### HUNT

When using the Hunt routing method, Chime takes the Agents from step 6 (in Steps Before Routing, above) and looks at the number of active chats they have currently, then the total number of chats they have taken today. The Agent with the least number of active chats and total chats is then routed to.

If that Agent doesn't accept the chat, the Agent is put into the exclude list and the Agent with the next lowest amount of total chats is then routed to. If **Route by Priority** is enabled, all Agents at priority 1 are processed first, then priority 2, priority 3, and so on.

**Example:** No Priority

Agent	Active Chats Right Now	Chats Today	Routing Pick
Jane	2	5	
Migumi	2	8	
Juan	1	10	X

Juan is picked because they have the least number of active chats. If Juan doesn't accept the chat, then Jane is routed to next because they have the least number of chats today of the remaining Agents.

**Example:** Route by Priority

Agent	Priority	Active Chats Right Now	Chats Today	Routing Pick
Jane	2	2	5	
Migumi	1	2	8	X
Juan	3	1	10	

Migumi is picked because they are the only Agent at priority 1.

### LONGEST IDLE HUNT

When using the Longest Idle Hunt method, Chime takes the Agents from step 6 (from the Steps Before Routing, above) and finds the Agent that has not accepted a chat for the longest time and routes the chat to them. If that Agent doesn't accept the chat, the Agent with the next longest time is chosen and then routed to.

If **Route by Priority** is enabled, Agents that are set to priority 1 are processed first, even if the other priority levels have Agents that have waited longer since their last chat they accepted. If no Agents are available or do not accept at that priority level, Chime moves to the next priority level.

**Example: No Priority**

Agent	Time Since Last Accepted Chat	Active Chats Right Now	Chats Today	Routing Pick
Jane	3 minutes	2	5	X
Migumi	2 minutes	1	8	
Juan	1 minute	1	10	

Jane is picked because they have been idle the longest since they last accepted a chat. If Jane declines, then Migumi is routed to next.

**Example: Route by Priority**

Agent	Time Since Last Accepted Chat	Priority	Active Chats Right Now	Chats Today	Routing Pick
Jane	3 minutes	3	2	5	
Migumi	2 minutes	2	1	8	
Juan	1 minute	1	1	10	X

Juan is routed to first, because they are the only Agent at priority 1. If Juan declines, then Migumi is routed to next because they are the only Agent at priority 2.

**BROADCAST**

When using the Broadcast routing method, Chime sends out an incoming chat request to all Agents from step 6 (from the Steps Before Routing, above) at the same time. The Agent that accepts the request first is routed to.

If **Route by Priority** is enabled, Agents that are set to priority 1 are sent the broadcast first. All of these Agents are notified at the same time, and they all have the opportunity to accept the chat. If no Agent at priority 1 accepts the chat request, then all available Agents at level 2 (and then level 3, and so on to the lowest priority, and then back to 1) are sent the broadcast until the incoming guest either times out waiting or an Agent accepts.

**Example: No Priority**

Agent	Active Chats Right Now	Chats Today	Routing Pick
Jane	2	5	X
Migumi	2	8	X
Juan	1	10	X

Juan, Migumi, and Jane are all picked for the broadcast routing.

**Example: Route by Priority**

Agent	Priority	Active Chats Right Now	Chats Today	Routing Pick
Jane	2	2	5	
Migumi	1	2	8	X
Juan	3	1	10	

Migumi is picked because they are the only Agent at priority 1. If Migumi declines, then Jane is picked because they are the only Agent at priority 2.

**SKILL BEST-MATCH HUNT**

When using the Skill Best-Match Hunt routing method, Chime will take the Skill Tag that is assigned to the guest's request and choose an Agent (from step 6 of the Steps Before Routing, above) that has a matching skill tag. If multiple Agents have the matching skill tag, Chime will look at the available Agents' total number of chats today before choosing an Agent to route to. If no Agent is available that has the matching skill tag, Chime will route the chat based on the Hunt methodology.

If **Route by Priority** is enabled, Chime searches for an Agent with the skill tag by priority levels (1 first, then 2, then 3, and so on). If a match isn't found, Chime does a Hunt search with the Route by Priority enabled.

**Example: No priority with skill tag "Password Reset"**

Agent	Skill Tag	Active Chats Right Now	Chats Today	Routing Pick
Jane	Password Reset	2	5	X
Migumi	Password Reset	1	8	
Juan	VPN	1	10	

Jane is picked because they have the matching skill tag and the least number of chats today. If Jane declines the session, then Migumi would be routed to next.

**Example: Route by Priority with skill tag "Password Reset"**

Agent	Skill Tag	Priority	Active Chats Right Now	Chats Today	Routing Pick
Jane	Password Reset	3	2	5	
Migumi	Password Reset	2	1	8	X
Juan	VPN	1	1	10	

Juan is skipped at priority 1 because he doesn't have the "Password Reset" skill tag. Migumi is picked because she is the only Agent at priority 2 with the skill tag.

---

## ROUTING SETTINGS

Every Routing Method shares the same settings that can be configured and applied to enhance the routing for Guests as well as Agents.

### **Route By Priority?**

- This option determines whether or not Guests will route to People in the Queue based on their priority. Routing by Priority is explained in the previous section, this simply determines if it this setting will be turned on or off.

### **Always Route Guests In Order Of Arrival?**

- This option allows Managers to decide the order that Guests will route to Agents. If this Setting is turned on, the Guests will be routed to Agents in order of Arrival which means when a guest enters the queue, they will not route to an Agent until all of the Guests ahead of them have already routed to an Agent.
- If this setting is turned off, all Guests will be trying to route to Agents at the same time. This is faster for the most part, but the Guest waiting the longest might not always be the first to get connected to an Agent.

### **Accept Timeout (Seconds)**

- The value set here is what determines the amount of time the agent is given to accept a chat that goes to them. If the agent accepts the chat within this time window they will be connected to the Guest, if they do not accept it within this time window, it will route to another Agent. By Default this is set to 30 seconds.

### **Guest Timeout (Seconds)**

- This setting determines how long a Guest is able to wait before being timed out. If the Guest waits for the full time period listed here, their chat will be ended and they will be notified that nobody was able to accept their chat. By default this setting is set to 300 Seconds.

**Note:** It is recommended that the value of this setting is greater than the value of the Accept Timeout value. If it is not, it is possible that the Guest will time out before more than one agent gets a chance to accept the chat.

### **Guest Update Interval (Seconds)**

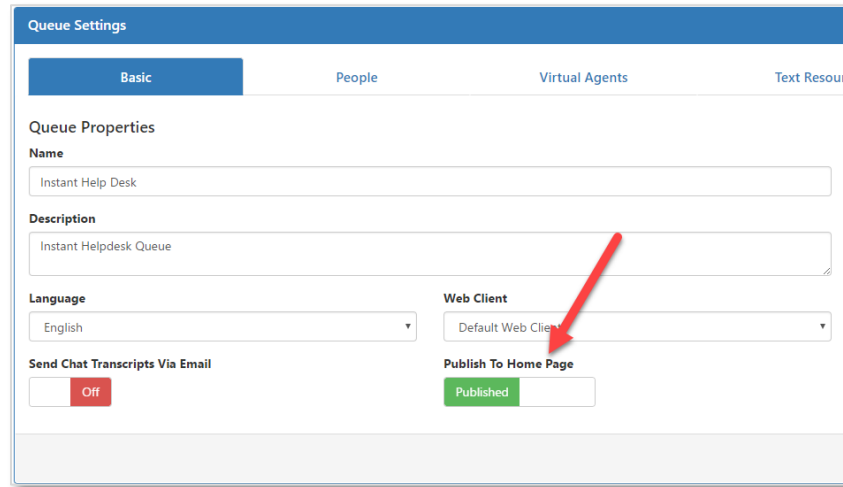
- This setting controls how often the Guest will see the “Searching For Person” message from the queue. By default it is set to 10 seconds.

### **Rollover Queue**

- This option allows the Manager to determine if Guests from the queue will be rolled over to another queue if they Time Out while routing. The Dropdown there will display all of the other queues that can be routed to. By Default, the Guests will not Rollover to another queue.

## ROUTING TAGS

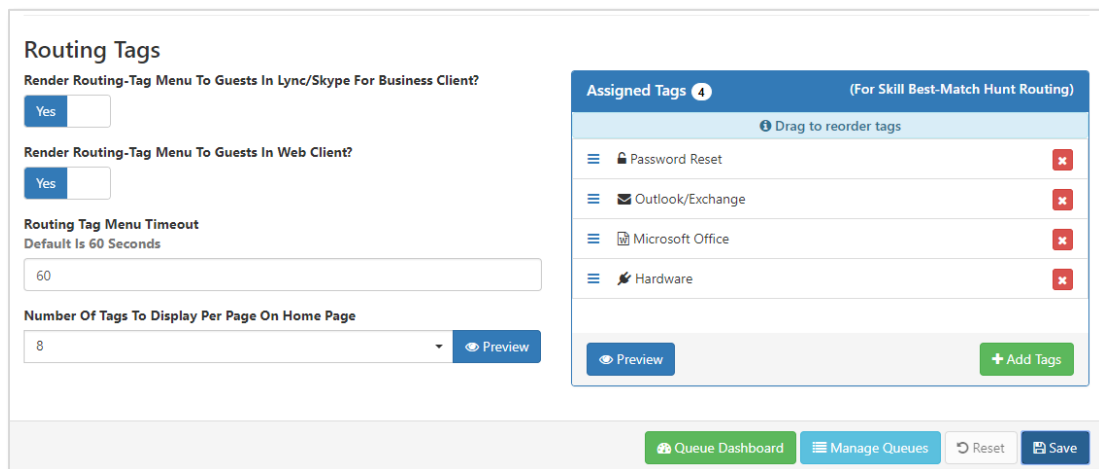
When the Skill Best-Match Hunt method is chosen, there is an area to define queue-level routing tags. These will appear automatically on the Guest Landing Page (home page) if the queue setting is set to “Publish to Home Page” (This setting can be found on the Basic tab of Queue Settings).



The screenshot shows the 'Queue Settings' interface with the 'Basic' tab selected. Under 'Queue Properties', the 'Name' is 'Instant Help Desk' and the 'Description' is 'Instant Helpdesk Queue'. The 'Language' is set to 'English'. The 'Web Client' is 'Default Web Client'. The 'Send Chat Transcripts Via Email' toggle is 'Off'. The 'Publish To Home Page' toggle is 'Published', which is highlighted by a red arrow.

Figure 43: Publish Queue to Home Page

To add in Tags that will display on the Home page, click the **Add Tags** button. This will bring up a modal that has a list of all the tags that have been created on Chime. Select all of the Tags that should be added to the Queue, then click the **OK** button.



The screenshot shows the 'Routing Tags' modal. On the left, there are settings for 'Render Routing-Tag Menu To Guests In Lync/Skype For Business Client?' (Yes), 'Render Routing-Tag Menu To Guests In Web Client?' (Yes), 'Routing Tag Menu Timeout' (60 seconds), and 'Number Of Tags To Display Per Page On Home Page' (8). On the right, there is a list of 'Assigned Tags' (4) for 'Skill Best-Match Hunt Routing'. The tags are: Password Reset, Outlook/Exchange, Microsoft Office, and Hardware. Each tag has a red 'X' button to remove it. At the bottom right of the tag list is a green '+ Add Tags' button. At the bottom of the modal are buttons for 'Queue Dashboard', 'Manage Queues', 'Reset', and 'Save'.

Figure 44: Queue Settings for Routing Tags

Once Tags have been added in, you can reorder how they display on the Home Page by using the drag and drop feature. The preview button allows you to get a sneak peak of what the home page will look like when you

Additionally there are a few settings that you can configure to completely customize the way Guests interact with the Routing Tags:

#### **Render Routing-Tag Menu To Guests In Lync/Skype For Business Client?**

- This option allows you to decide if users who start a chat on the queue using Lync or Skype For Business will be prompted to select a Tag.
- When set to Yes, the Guest will be prompted to enter in a tag that is associated with their question. When set to No, the Guest will never be prompted to enter in anything and will route directly to an agent.

#### **Render Routing-Tag Menu To Guests In Web Client?**

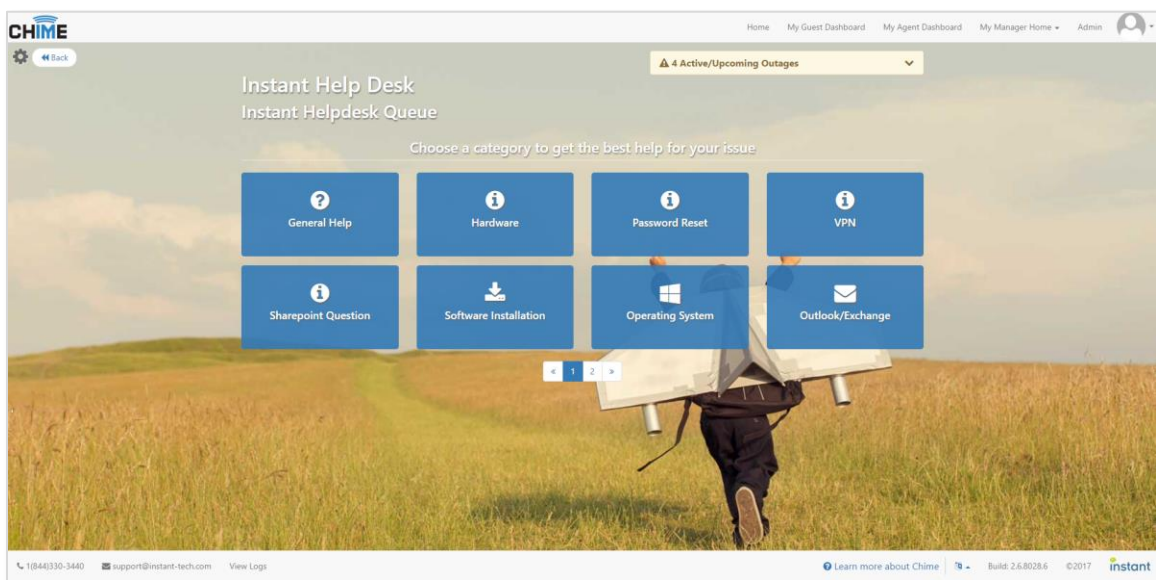
- This option allows you to decide if users who start a chat on the queue the Web Client will be prompted to select a Tag.
- When set to Yes, the Guest will be prompted with a drop-down field in the pre-chat form to enter in a tag that is associated with their question. If the Guest ignores the drop-down, and starts the chat, they will be prompted to enter in a tag that is associated with their question. When set to No, the Guest will never be prompted to enter in anything and will route directly to an agent.

#### **Routing Tag Menu Timeout**

- This setting allows you to configure the timeout value for the Routing Tag Menu. This setting determines how long the Guest has to enter in their selection in the Routing Tag Menu. If the Guest does not enter a valid response in this time frame, they will be automatically routed to an Agent.

#### **Number Of Tags To Display Per Page On Home Page**

- This setting determines how many routing tags will display on the Home page for the Guest. You can choose from either 8, 16 or All. If you have more tags than the option you select, the Home Page will be divided into multiple pages that the Guest can go through to find all of the tags available.



**Figure 45: Guest Landing Page with Routing Tags**

The routing tags show up as an IVR-style menu in the guests' chat client if either of the following settings are ON. The text resources "Routing Tag Menu Greeting", "Routing Tag Menu Option 0", and "Routing

Tag Menu Invalid Response” are used to create the menu text. Guests select a routing tag by choosing a number from the menu.

- Render Routing-Tag Menu To Guests In Lync/Skype For Business Client?
  - The routing tags assigned to the queue are shown to guests using the Lync/Skype for Business client.
- Render Routing-Tag Menu To Guests In Web Client?
  - The routing tags assigned to the queue are shown to guests using the Web Client. If a routing tag has already been assigned, for example, from the pre-chat form or the guest landing page routing areas, then the routing tag menu is not shown.

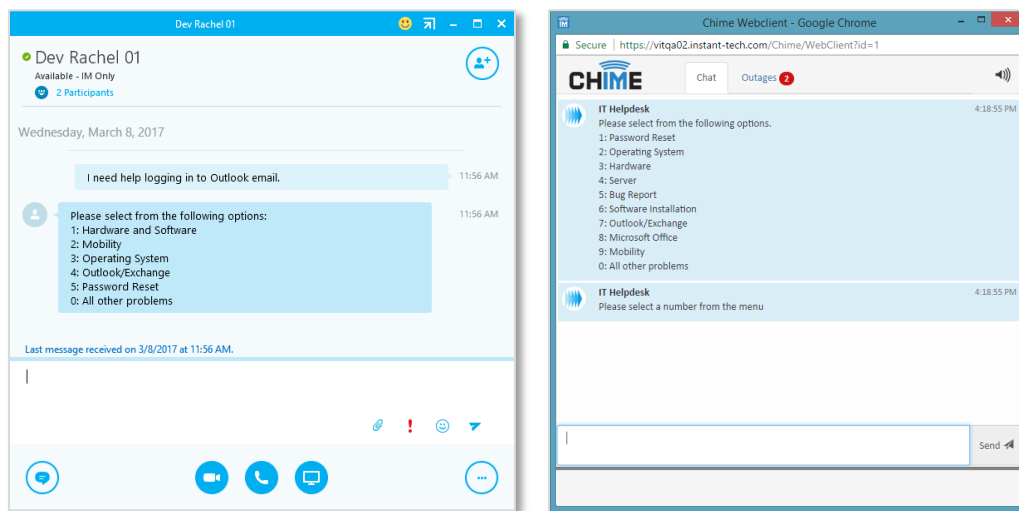


Figure 46: Routing Tag Menus

## SCHEDULE

The times when a Queue is online is really important to be able to control. Chime supports two modes that allow you to control when the queue is online and when it is offline; **Based on Availability** and **Based on Schedule**. Additionally, there is a setting called **Always On Mode**, which ignores the settings of the other two modes and keeps the Queue online all the time.

### BASED ON AVAILABILITY

The Based on Availability Mode allows the Queue to be online as long as there is at least one Chat-Enabled User online. Over the course of the day the queue can go online and offline based on how many agents are working.



## BASED ON SCHEDULE

The Based on Schedule Mode allows Managers to decide when the Queue will be online. If the Queue is only supposed to be available during certain hours, this Mode is quite useful to limit the queue to being online only during those specified hours.

Day	On	Off	
Monday	1:00 PM 5:00 PM UTC	10:00 PM 2:00 AM UTC	
Tuesday	10 : 00 AM 2:00 PM UTC	11 : 00 PM 3:00 AM UTC	
Wednesday	2:30 PM 6:30 PM UTC	12:00 AM 4:00 AM UTC	
Thursday	No schedule set	No schedule set	
Friday	12:30 PM 4:30 PM UTC	8:00 PM 12:00 AM UTC	
Saturday	No schedule set	No schedule set	
Sunday	12:00 PM 4:00 PM UTC	7:00 PM 11:00 PM UTC	

[Queue Dashboard](#) [Manage Queues](#) [Reset](#) [Save](#)

Figure 47: Queue Schedule

To set up times for the Schedule:

1. Click the icon for the day you want to set a time for
2. Type in the time you want to set, or use the up and down arrows to determine the time for the On and Off times.
3. Set the times necessary for each day
4. Click the **Save** button to confirm all of the changes you made.

## ADVANCED

The advanced settings section allows Managers to configure things such as queue target values and chat settings:

**Target ASA:** Entering a number in this field will set a target value for Average Speed to Answer metrics and will display in any reports associated with the ASA in the Charts and Metrics area.

**Target Chat Concurrency:** This will set a target value for chat concurrency or number of chats being handled at once. This will display in any reports associated with the chat concurrency in the Charts and Metrics area.

**Target Average Chat Duration (Seconds):** This sets a target value for chat duration. This display in any reports associated with the Chat Duration in the Charts and Metrics area.

**CC/Web Chat Offline Email:** This email address will receive chat transcripts, and also information gathered from the Guest when the web client/queue is offline.

**Use Dispatcher Email:** Determines whether or not to use the email address associated with the Dispatcher to dispatch emails. **Note:** This email must be SMTP enabled to send emails; if it is not SMTP enabled the emails will fail to send.

**Dispatcher Email Address:** The email address associated with the Queue's Dispatcher.

**Send Email When A Guest Times Out:** The email address below will receive an email when a Guest's times out while waiting to be routed to an Agent. Below this you are also able to customize the Email Subject and Message that will be sent when the Guest times out.

**Upload New Photo:** Uploading a picture here will change the image of the queue that Guest will see on the Home Page and in the Web Client.

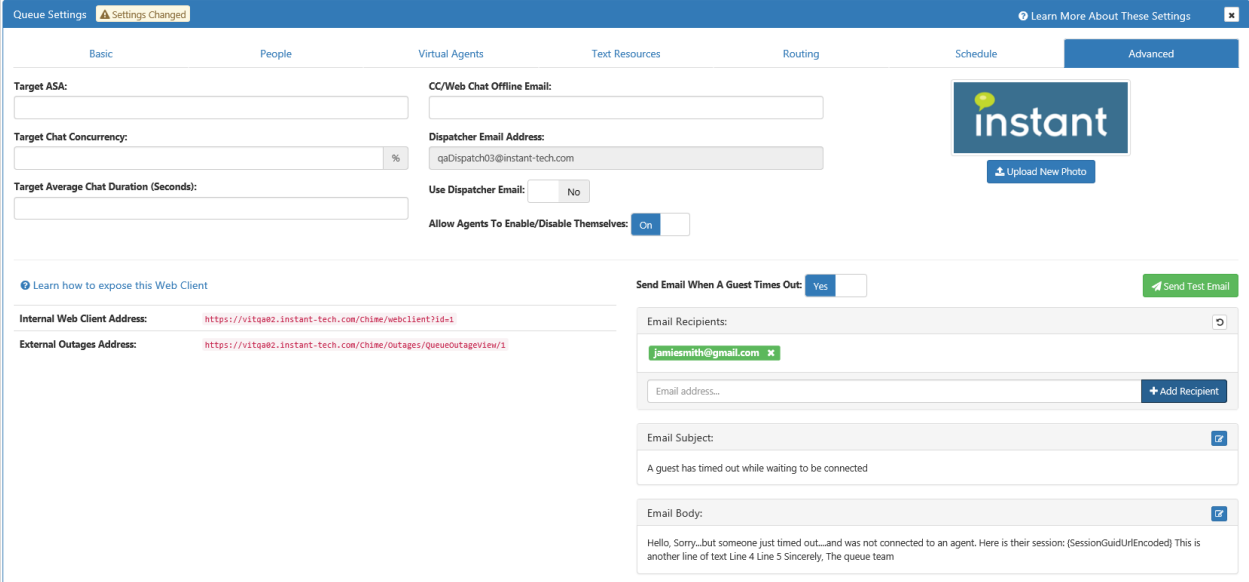



Figure 48: Advanced Queue Settings

## DELETING A QUEUE

To delete a queue, click the  icon for that queue located on the right side of the queue grid.

## QUEUE DASHBOARD

The Queue Dashboard will give you current information for that specific queue such as the number of experts that are online, the number of users that are connected, and average wait times for each queue. To get to the Queue Dashboard

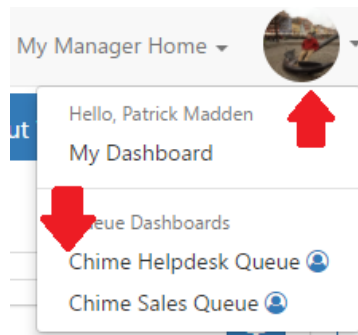


Figure 49: Connected Chat on Monitor

On the top right, under Desk Agents, there is a blue **Refresh** button. This manually refreshes the Lync statuses of the agents assigned to that queue.

## ACTIVE AGENT CHATS

While Agents are in chats, Managers are able to see live data on the Monitor section in queue settings. In addition, Managers are able to see chat history under the Details section in queue settings. Active Agent chat gives Managers insight on chats between the Agents and Guest.

## MONITOR SECTION

The Monitor page shows all guests who have sent out a request and are currently waiting, and all guests who are connected to a chat with an agent. There is a date filter to check for stuck chats from previous days.

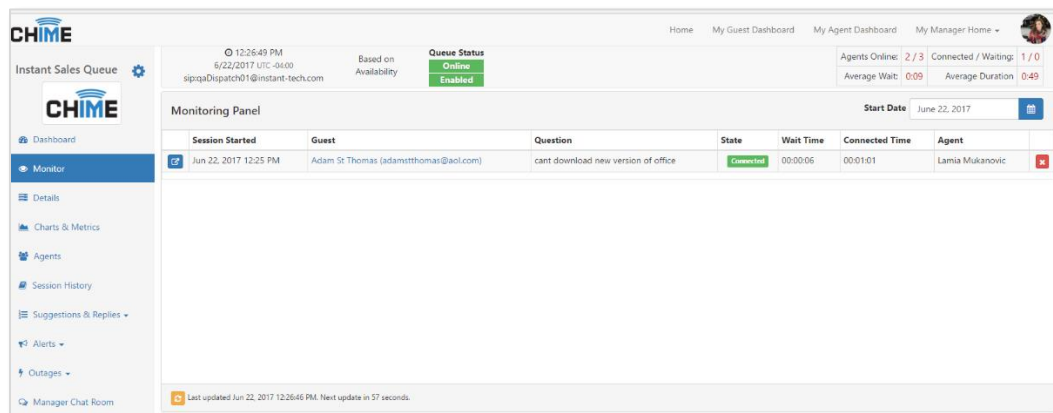


Figure 50: Connected Chat on Monitor

## DETAILS SECTION

The Details page shows all chats that have been created in that queue that day. You can filter the chats by All, Connected, Waiting, Dropped, Disconnected, Completed, Timed Out, Rolled Over, and Queue Unavailable. Additionally, you can access the Details of the chat as well as the Chat history of the Guest. There is a date filter to access chats from that queue across a certain time frame.

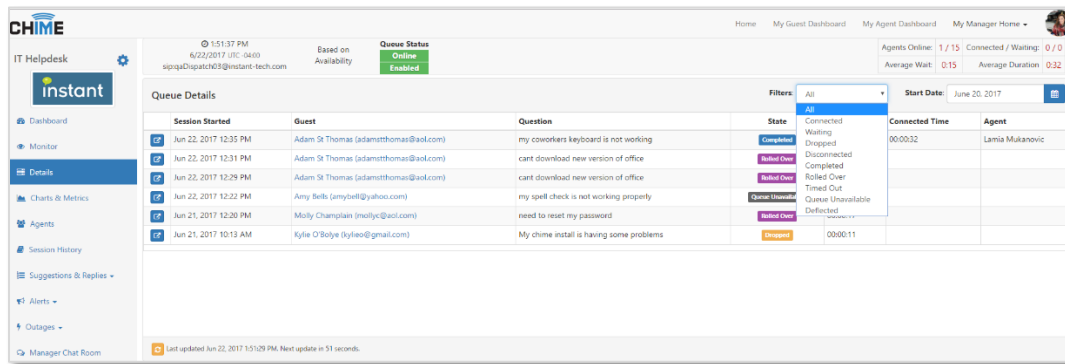


Figure 51: Filters on Details Section

## CHARTS & METRICS

The Charts and Metrics page shows statistics and graphs for a specific queue, which is customizable by length of time. In addition, all of the graphs can be exported as CSV (Common Separated Values). There are 4 subcategories of Charts and Metrics:

1. Basic Statistics- Provides line and bar graphs to help visualize the general statistics on chats started for the queue.
2. Performance Metrics- Shows statistics on Agent rating and effectiveness, as well as how smoothly the queue is functioning.
3. Agent Efficiency and Load- Statistics on Agents in the queue.
4. Text Analytics- Statistics on the Guests questions and how the queue is used.

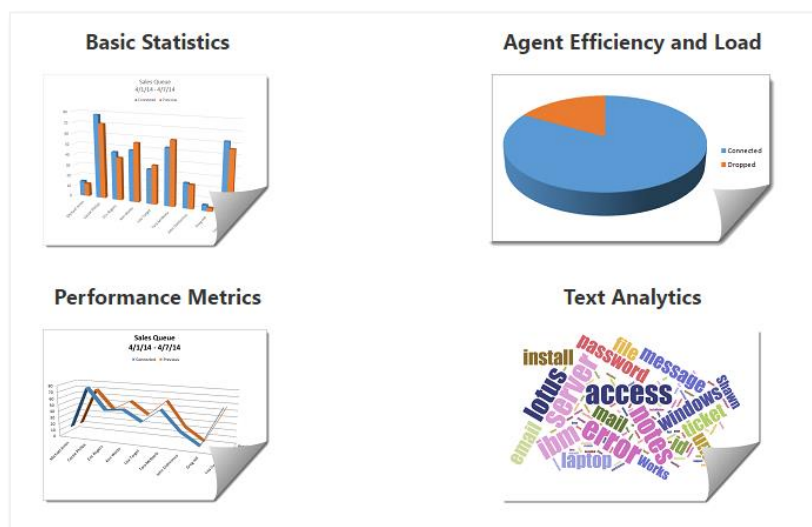


Figure 52: Charts & Metrics

## BASIC STATISTICS

This section allows for Managers to view charts and report for a certain time period for their queue. There is a drop down menu for various types of charts. All of the Charts and Reports in here are designed to give high-level information about the Queue.

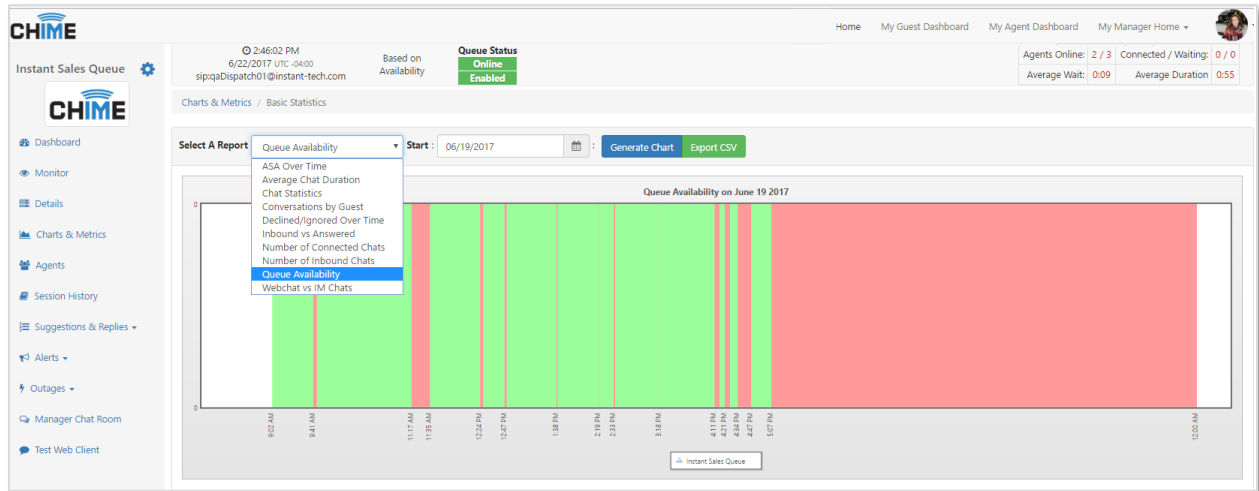


Figure 53: Queue Availability Chart

## PERFORMANCE METRICS

This area is about the Agent ratings and how well the Agents are Helping the Guests and how often the Agents are Taking Concurrent Chats.

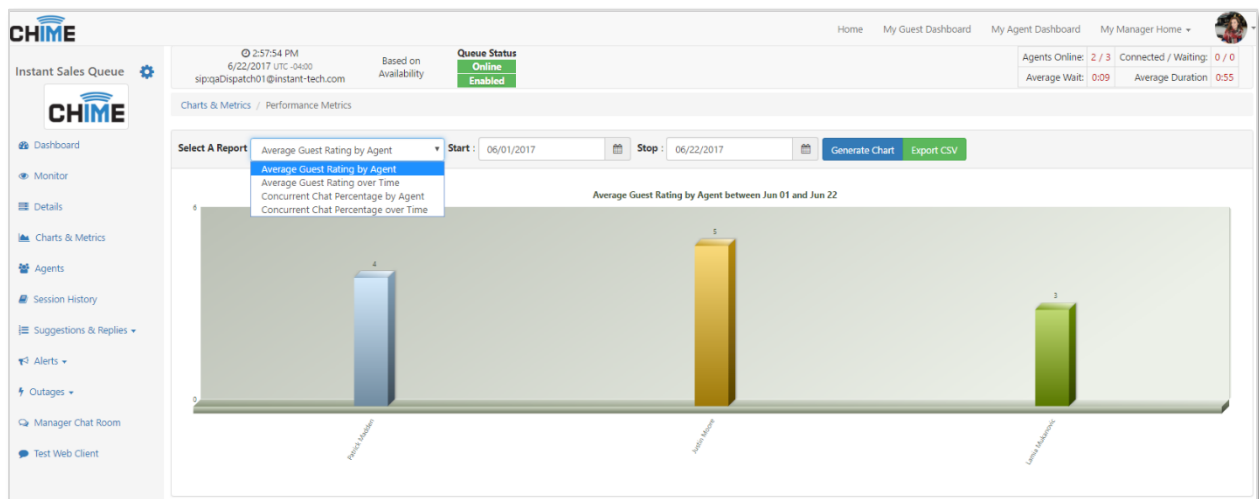


Figure 54: Average Guest Rating by Agent Chart

## AGENT EFFICIENCY AND LOAD

This area is about the ability of different Agents in the queue. It allows you to view the availability, speed to answer, and number of conversations to name a few of the reports.

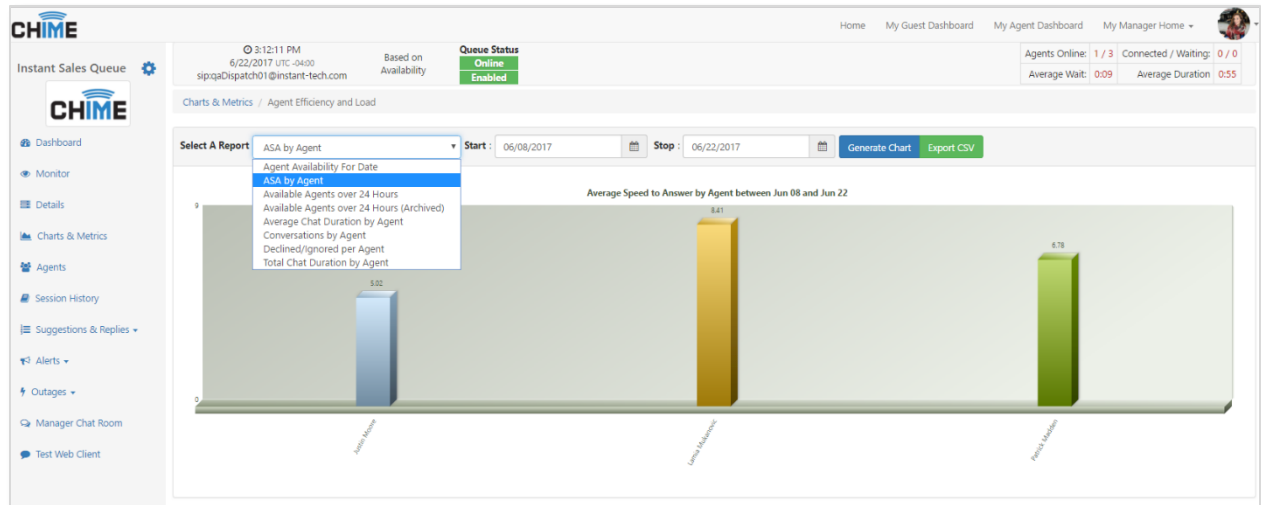


Figure 55: Average Speed to Answer by Agent Chart

## TEXT ANALYTICS

In this section it shows the trends inside the queues. This allows you to see if the queue is improving over time, and it allows you to seed the trends of questions coming into the Queue so you can adjust resources as necessary to answer these questions.

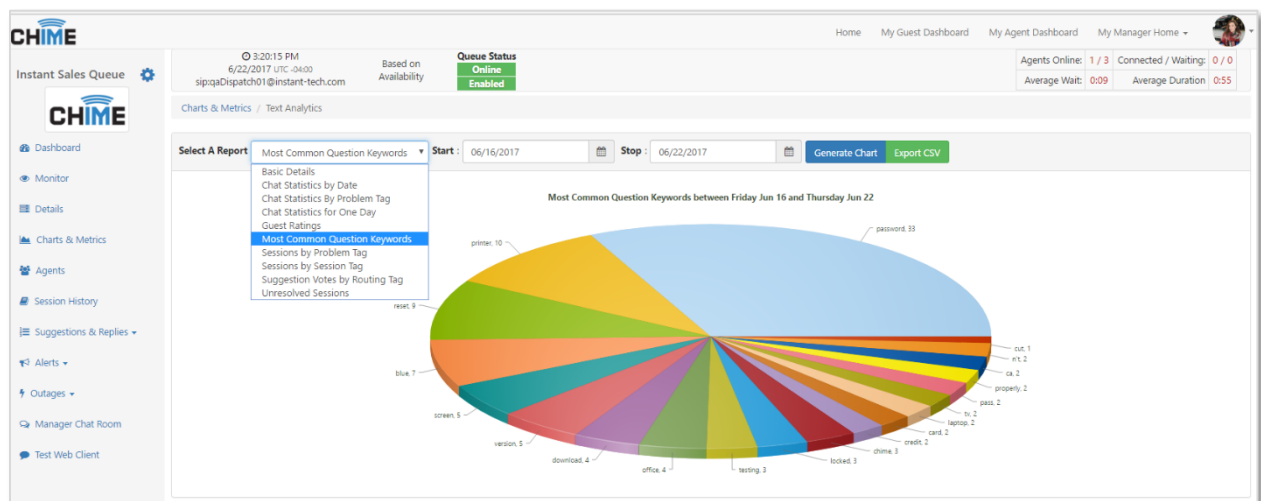


Figure 56: Most Common Question Keywords Graph

## AGENTS

The Agents page is where an admin or a manager can view all of the agents in that queue and view records such as agent's skills, personal chat statistics, and chat transcripts. There is a **Force Agent Presence Refresh** button that allows agents to manually refresh their Lync status on Chime.

## SESSION HISTORY

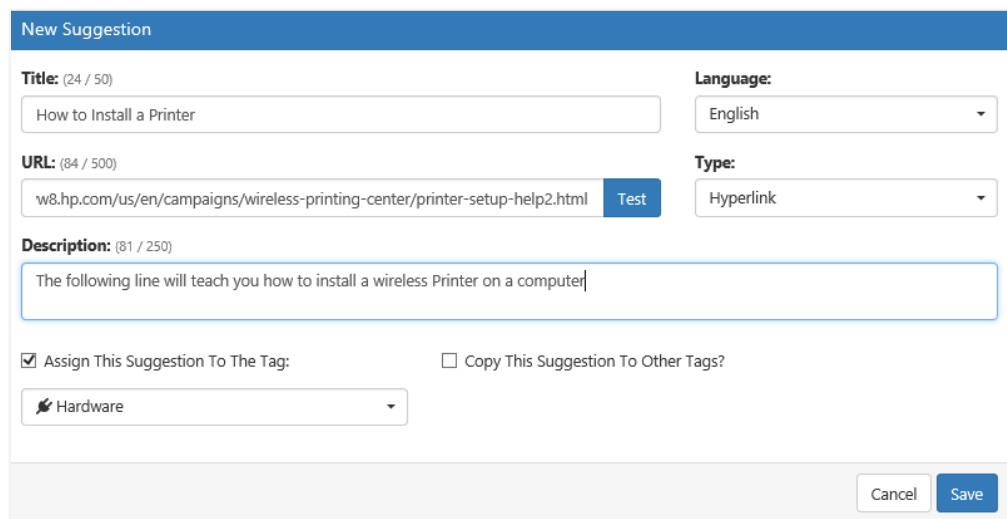
The History page is where a user can view a list of chats within a certain time frame. These chats can be sorted by guest email, session ID, and start and stop date.

## SUGGESTIONS AND REPLIES

In this section Managers can add suggestions on skill tags for each queue. This is helpful to guest by having prewritten common questions and answers without starting a chat. With the **Add Suggestion** button Managers can create suggestions for guests to use.

### ADDING A SUGGESTION

Once **Adding Suggestion** is clicked a modal appears. Each field in the modal must be filled in to create a suggestion that will appear under the skill tag.



The screenshot shows a 'New Suggestion' modal form. It has a blue header bar with the text 'New Suggestion'. Below the header, there are four main input sections: 'Title' (with a character count of 24 / 50), 'URL' (with a character count of 84 / 500), 'Description' (with a character count of 81 / 250), and 'Language'. The 'Title' field contains the text 'How to Install a Printer'. The 'URL' field contains the text 'w8.hp.com/us/en/campaigns/wireless-printing-center/printer-setup-help2.html' and has a 'Test' button next to it. The 'Description' field contains the text 'The following line will teach you how to install a wireless Printer on a computer'. The 'Language' field is a dropdown menu with 'English' selected. Below these fields, there are two checkboxes: 'Assign This Suggestion To The Tag:' (checked) and 'Copy This Suggestion To Other Tags?' (unchecked). The 'Assign This Suggestion To The Tag:' checkbox has a dropdown menu with 'Hardware' selected. At the bottom right of the modal, there are 'Cancel' and 'Save' buttons.

Figure 57: Adding a New Suggestion

- Title- Enter in the appropriate name for the suggestion tag.
- URL- Copy/Paste a URL that is associated with the suggestion.
- Description- Add a description so guests know what the link will do.
- Language- Select the language desired.
- Hyperlink- This is associated with the URL, it can either be a Hyperlink or Video.

The **Copy This Suggestion To Other Tags** box allows the created suggestion tag to be used on other skill tags.

## IMPLEMENTATION OF SUGGESTIONS ON HOME PAGE

To Add a Skill tag for Guests to use follow the steps below.

1. My Manager Home → Manager Queues → Queue Settings → Routing → Assigned Tags → Add Tags

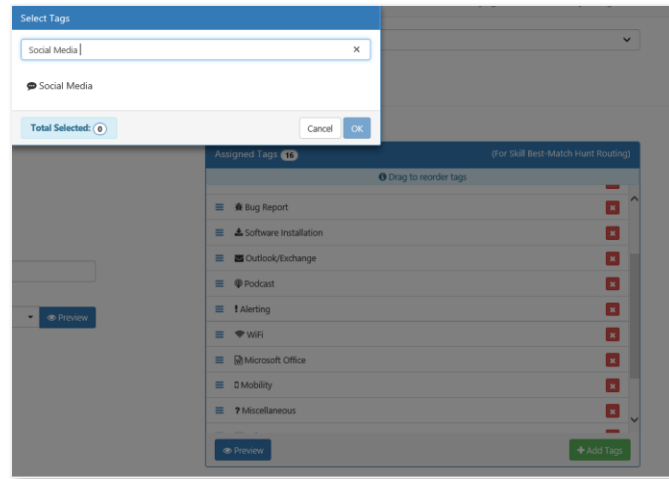


Figure 58: Adding a Skill Tag on Routing

2. My Manager Home → Manager Queues → Queue Dashboard → Suggestions & Replies → Suggestions
  - Order Suggestions on Home Page By
    - Choosing **Order** allows the Manager to decide the order of the suggestion tags, after clicking **Change Order** the order will change.
    - Choosing **Up Votes** makes the order of the suggestion tag based on what the guests find most helpful based on up votes/ down votes.
  - Show General Info Suggestions
    - Show
    - Hide
  - Suggestion Display Type
    - Gives three options and a preview on how the suggestion tags will look on the Home Page.

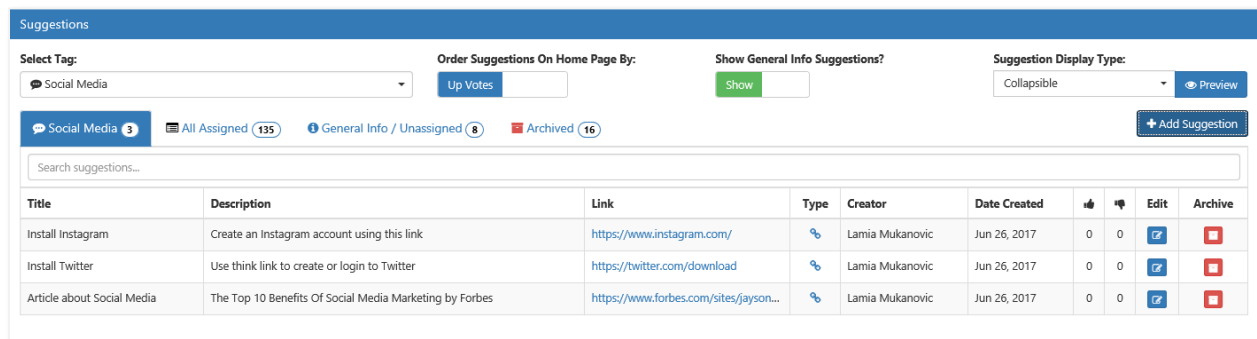


Figure 59: Suggestions on Queue Dashboard



3. Home → Queue → Skill Tag

At the end, this is how the skill tag will appear on the Home Page

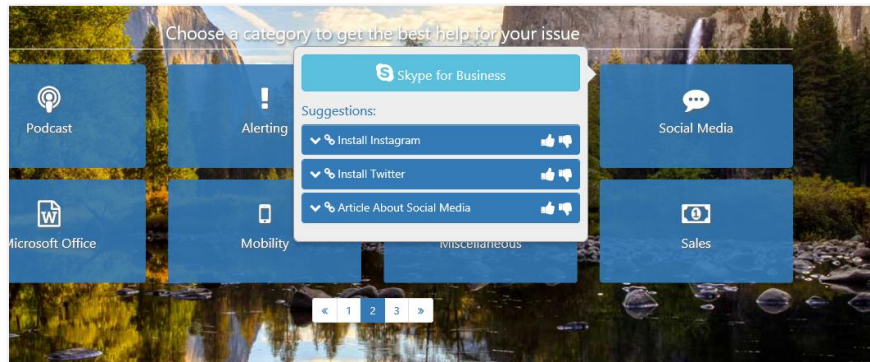


Figure 60: Home Page with Skill Tag

## STANDARD REPLIES

Managers can create standard replies for Agents to use during chats. To create a standard reply go to My Manager Home → Manage Queues → Queue Dashboard → Suggestions & Replies → Standard Replies

### CREATING A STANDARD REPLY

To create a new standard reply, click **+ New Standard Reply** then fill in all of the requirements and click **Preview Text** when finished. **Note: a new line will not be created unless \n is at the end of the line.** This standard reply can be used inside a chat located on the Replies tab while an Agent is talking with a Guest.

A screenshot of the 'Standard Reply Editor' form. It includes fields for 'Title' (Password Reset), 'Reply Type' (TXT), and 'Language' (English). The 'Reply Message' field contains a text area with a link: 'Here is a link for some password reset stuff:\nhttps://support.office.com/en-us/article/Admins-Reset-Office-365-passwords-7a5d073b-7fae-4aa5-8f96-9ecd041aba9c'. There is a 'Preview Text' button and a 'System Variables' dropdown. At the bottom are 'Cancel' and 'Save' buttons.

Figure 61: Creating Standard Reply

## ALERTS

In Chime there are two options for the types of alerts you can create, Default and Enhanced. A Default alert will be sent to the recipients as a Lync message from the dispatcher. An Enhanced alert however, will open up using the Chime Alerting App and will be thoroughly customizable. With the Enhanced Alerts you can send the alert using Rich Text, alter the colors of the text or alert background, display who sent the alert, as well as the size and position of the alert when it pops up on the recipients screen.

To have Enhanced Alerts working as intended, recipients must have the Chime Alerting App installed and running on their system.

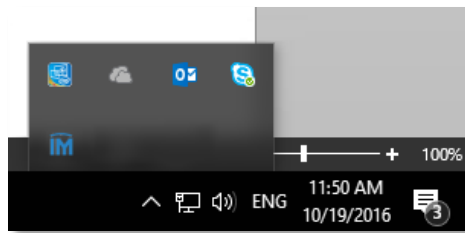


Figure 62: Alerting App – System Tray

When you install the Chime Alerting App, you will have a new icon in your system tray. This is where you will access all of the settings for the Chime Alerting App. Right click on the app and click on Settings. This will allow you to configure the settings for the Alerting App.

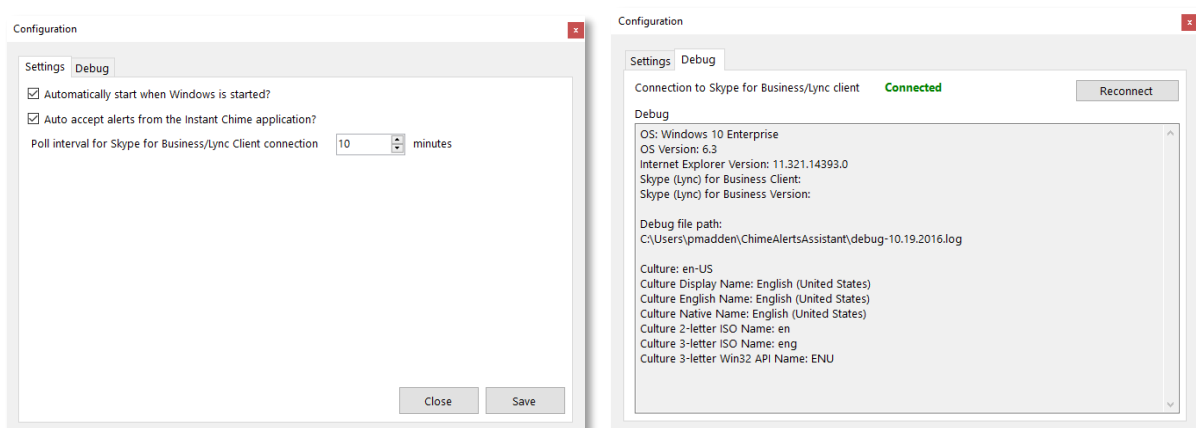


Figure 63: Alerting App – Settings and Debug

## CREATE ALERT

To create an alert, click the 'Alerts' drop down menu, and then **Create Alert**.

1. The first section, 'Message', is where you fill in the alert's title and the message you want to send to the recipients.

Figure 64: Alert Message

2. Additionally you can select between multiple languages to set for the alert. In the top right of the Create an Alert box, there is a dropdown that you can choose a language from. Once you select a language you want to add, click the Add Language button.

Figure 65: Adding Additional Languages

3. This will create a new tab where you can type in the title and body of the message. Having multiple language tabs will create additional messages in your alert. To delete a language from the alert, simply click the red x at the top of the language tab you want to delete. When finished, click the next button.

4. The second section, 'Recipients', is where you assign who will receive the alert. You can choose specific users, groups, and queues to receive the alert. There are three ways you can select recipients.
- From Active Directory: If the recipient is in Active Directory, they be added by searching for them in the Search > Active Directory section. In this section you can search by users or by AD groups by clicking the drop-down arrow and selecting between groups and users.
  - From the Queue: A recipient that is in the queue can be added by on either the "Add Queue Agents" or "Add Queue Managers" button.
  - Federated User: The third way to add a recipient is by using the Add Federated User section. In here, you type in "sip:" and then the email address of whomever you want to send the alert to. This allows the option of sending the alerts to users outside of the active directory.
  - Upload Recipients: The last way to add recipients is by uploading a text file with one SIP URI recipient per line. Click **Pick File...** and select the file containing the recipients to add them to the alert.

create An Alert...

1) Message 2) Recipients 3) Options 4) Schedule & Priority

Search Active Directory White List Filtering: Off

Search users or groups... Search Users Q

Selected Recipients And Groups: 0 | 300 Maximum Recipients

Search Recipients... Clear Recipients

From Queue:

Add Queue Agents + Add Queue Managers +

Upload Recipients:

Upload a text file with one SIP URI recipient per line

Pick File...

Clear Alert Send as Unplanned Outage Save as Template Send Alert

Figure 66: Alert Recipients

5. After adding the recipients, they will show up in the Selected Recipients and Groups box. To remove any of them from the recipient list, simply click the Remove button to the right of the recipient's name. When finished adding all necessary recipients to the list, click the next button to proceed to the next step.

**Create An Alert...**

1) Message 2) Recipients **3) Options** 4) Schedule & Priority

Search Active Directory White List Filtering: **Off**

Search users or groups... Search Users

Include "sip:" Add Federated User

**Selected Recipients And Groups: 3 | 300 Maximum Recipients**

Justin Moore	Remove
Patrick Madden	Remove
Vivek Garg	Remove

Search Recipients... Clear Recipients

**From Queue:**

Add Queue Agents Add Queue Managers

**Figure 67: Added Recipients**

6. The third section, 'Options', is where you can enhance the alert. When you first open up the Options tab, you will see a selection toggle that allows you to select between default alerts and enhanced alerts.
  - The default alert sends out an alert to users simply using the Lync/Skype for Business client and does not allow you to change the look and feel of the alert.
  - The enhanced alert, however, allows you to change the look of the alert, and add in extra features. To use the enhanced alerts, it is highly recommended that the users receiving the alerts have the Chime Alerting App installed and running.
7. If you want to use the default alert option, all you need to do is leave the Alert Type toggle set to 'Default'. You can then press the Next button and proceed to the final step.

**Create an Alert...**

1) Message 2) Recipients 3) Options **4) Schedule & Priority**

**Alert Options:**

Alert Type: Default

**Enhanced Alert Settings:**

☐ Display Sender

Indicate the alert is from:

Window size: Medium Position on screen: Center

Title Color: #333333 Body Color: #333333 Background Color: #f0f0f0

Reset

**Enhanced Alert Preview:**

Clear Alert Send as Unplanned Outage Save as Template Send Alert

**Figure 68: Alert Options**

8. If you want to create an enhanced alert, there are a few extras steps you have to complete before moving on to the final step.
  - First, you must change the Alert Type toggle to 'Enhanced'. This will allow you to access the rest of the enhanced alert settings as well as display a preview of the alert.
  - Second, you must decide if you want to display the sender information. By clicking the check box for 'Display Sender', the Preview will update and show your Chime user image along with a "message on behalf of:" label. If you need to send the alert on behalf of someone else, you would click the Pick user from directory button and be able to select a different user to show up in the image and in the label.
  - Next, you are able to determine how the alert will look. There are five options that you can select from to alter the various aspects of the alert. You can change size, position it will open on the screen, title color, body color, and the background color. Using these tools, you can thoroughly customize the alert.
  - At any point when customizing the enhanced alert, you are able to click the 'Reset' button and clear all of the settings for the enhanced alert settings.

Figure 69: Enhanced Alert Features

9. The last section, Schedule & Priority, is where you can schedule the delivery and expiration time, as well as set a priority for the alert.

Figure 70: Alerts Schedule & Priority

At any point during the creation of an alert, you are able to clear everything and start over. There is a “Clear Alert” in the bottom left of all of the pages that you are able to click to restart back on the first step of creating the alert with all of the fields cleared. Enabling **Deliver Expired Alerts By Email** will email the alert to all intended recipients if the alert expires.

During the creation process of an alert, you can set it as an Unplanned Outage, which will add the alert you made to the Outages tab of the Queue Dashboard. It will send out the message you created as well as add it to the Outage history section of Outages.

Finally, by hitting the Send Alert button, the alert will be sent to the recipients and added into the Alert History section.

## ALERT TEMPLATES

When creating an alert you also have the option to save the format of the alert you just created as a template. To do this, you must have finished all four steps of creating an alert. The option to save as a template will then appear at the bottom of the screen. Once you create a template, it will store the outline of the alert you created in the Alert Templates sub-menu.

To view templates of previously created alerts, click **Alert Templates** in the Alert drop-down tab.

Alert Templates			
Show 10 entries		Search: <input type="text"/>	
Alert Title	Message Preview	Use Template	Delete Template
Annual Server Maintenance	The technicians in I.T. will be doing some server maintenance on our system. If you are experiencing any difficulties, it is	<a href="#">Use</a>	<a href="#">Delete</a>
There is pizza in the break room	It's Friday, so you know what that means! There will be pizza in the break room until 2:30	<a href="#">Use</a>	<a href="#">Delete</a>
Showing 1 to 2 of 2 entries		Previous 1 Next	

Figure 71: Alert Templates

In the Alert Templates section you are able to use or delete the templates created on Chime.

- By clicking the ‘Use’ button, you will be brought into the **Create Alert** section and all of the settings will be identical to when the template was saved. From there you will be able to change the settings, messages, or any other aspects of the alert.
- Selecting the delete button allows you to remove existing templates that are stored in Chime. Note: If you delete a template, there is no way to recover it.

## ALERT HISTORY

To see the details of all created alerts, click **Alert History**. This page allows you to filter through different kinds of alerts and see who has received the alerts.

**Active:** These are all the Alerts that are currently active and are being sent to users as they become available

**Scheduled:** These are the Alerts that have been scheduled to be sent out, but the scheduled time hasn't been reached yet.

**Completed:** These are the Alerts that have been sent out to all recipients.

**Expired:** These are Alerts that the time expired before the alert was sent to all recipients.

**Showing All:** This allows you to toggle between displaying all Alerts, High Priority Alerts, or Standard Alerts.

Active (1)	Scheduled (1)	Completed (4)	Expired (0)	All (6)	All	Page 1 of 1	Show 10	Select	
⚡ ⭐									
Starts: Sep 28, 2016 11:28 AM					Title: Meeting today at 2:30				
					Created by: Patrick Madden				
					IM: 0 Enhanced: 0 Email: 0 Unsent: 2 Total: 2				Delete
✓ ✓ ⭐									
Starts: Sep 28, 2016 11:26 AM					Title: Meeting today at 2:30				
					Created by: Patrick Madden				
					IM: 1 Enhanced: 1 Email: 0 Unsent: 0 Total: 2				Delete
✓ ✓ ⭐									
Starts: Sep 28, 2016 11:14 AM					Title: English Alert title				
					Created by: Patrick Madden				
					IM: 0 Enhanced: 2 Email: 0 Unsent: 0 Total: 2				Delete
✓ ✓ ⭐									
Starts: Sep 28, 2016 10:51 AM					Title: अग्रिहमन अग्र्यास				
					Created by: Vivek Garg				
					IM: 0 Enhanced: 1 Email: 0 Unsent: 0 Total: 1				Delete
✓ ✓ 📅									
Starts: Sep 27, 2016 1:19 PM					Title: Test to just a whitelist				
					Created by: Peyton McManus				
					IM: 7 Enhanced: 0 Email: 0 Unsent: 1 Total: 8				Delete
✓ ✓ ⭐									
Starts: Sep 27, 2016 1:13 PM					Title: استعداد				
					Created by: Vivek Garg				
					IM: 0 Enhanced: 1 Email: 0 Unsent: 0 Total: 1				Delete

Figure 72: Alert History



## ALERT DETAILS

By clicking on one of the alerts in any of the different tabs, you are able to open up the details of the specific alert. The details of the alert show who the alert was created by, when it was sent, who it was sent on behalf of, how many people have received it, or not received it, as well as the messages that were in all of the languages it was sent in.

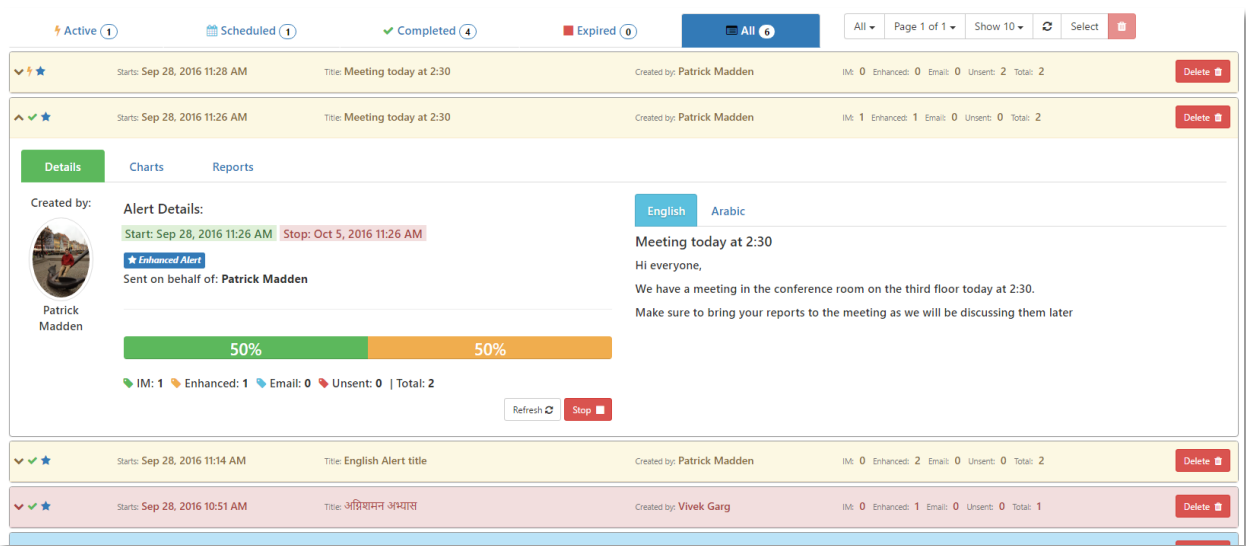


Figure 73: Alert Details

The charts tab shows various different sets of information that allow you to have a deeper understanding of how the alert was sent out and how many people have received the alert. To display the different charts, simply select the chart you want to display from the drop-down and then click the render chart button. Once the chart is displayed, you can use the Export CSV or Export chart buttons to save the information displayed in the chart.

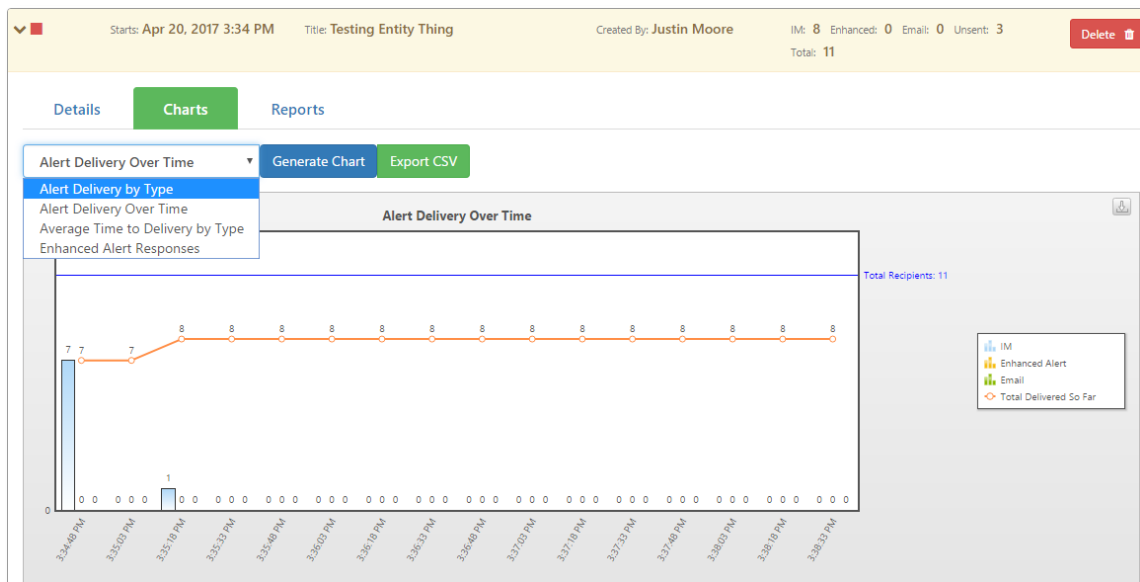


Figure 74: Alert Charts


The Reports tab shows the recipients of the alert and how they have received the alert. The five sections in reports are Total, IM, Enhanced, Email and Unsent. Going through the tabs can give you a better understanding of who has received the alert, what method they received it by, and how long it took them to receive the alert. Similarly to the Charts section, you are able to export the information to a csv file for further use.

The screenshot shows the 'Reports' tab selected. At the top, there are tabs for 'Details', 'Charts', and 'Reports'. Below the tabs, a summary bar shows 'Recipients:' with a 'Show' dropdown and an 'Export to ZIP' button. The summary bar also displays counts: 'Total: 11', 'IM: 8', 'Enhanced: 0', 'Email: 0', and 'Unsent: 3'. Below this is a search bar. The main table has five columns: 'Display Name', 'SIP Address', 'Delivered at', 'Time to Delivery', and 'Delivered By'.

Display Name	SIP Address	Delivered at	Time to Delivery	Delivered By
Cassie Regan	sip:cregan@instant-tech.com			Unsent
Eric Richards	sip:erichards@instant-tech.com	Apr 20, 2017 3:34 PM	10s	IM
Helpdesk Agent	sip:helpdeskagent@instant-tech.com	Apr 20, 2017 3:34 PM	11s	IM
Helpdesk Reviewer	sip:helpdeskreviewer@instant-tech.com	Apr 20, 2017 3:34 PM	10s	IM
Justin Moore	sip:jmoore@instant-tech.com	Apr 20, 2017 3:34 PM	09s	IM
MacGregor Thompson	sip:mthompson@instant-tech.com	Apr 20, 2017 3:35 PM	32s	IM
Matt Quinlan	sip:mquinlan@instant-tech.com	Apr 20, 2017 3:34 PM	10s	IM

Figure 75: Alert Reports

## DELETE AN ALERT

Alerts can be deleted two different ways. You can delete a single alert by pressing the “Delete” button for the Alert you wish to remove. To delete multiple Alerts, press the “Select” button, select the alerts you wish to remove, then press the  button.

## ALERT SETTINGS

The **Alert Settings** section is primarily for White List Filtering configuration. White List Filtering can limit the Active Directory groups to which alerts can be sent. This is ideal for organizations with large amounts of groups, or those who wish to prevent certain groups from receiving alerts. If enabled, only the groups listed in the White List Groups table on this page can receive alerts. These settings can only be configured by a Chime admin.

To enable and use White List Filtering you must go through a few steps:

1. First, Toggle the White List Filtering setting to the on position.
2. Second, use the Search Active Directory section to search for the group that you want to add to the White List.
3. Click the add button to add it into the group.
4. Alternatively, you can use the Add Known Group Search box to add the group if you know the full name of the group.
5. If you add a group you do not on the White List or want to remove one of the ones on the list, simply click the red x in the remove column for the group name you want to delete. You will be asked to confirm that you want to delete the group from the list.
6. Once you have added groups to the White List, those will be the only groups you can search from in the Recipients section.

On the **Alert Settings** page, you can also:

1. Decide whether to send emails when the alert has expired by default.
2. Decide how many seconds Chime should wait before resending a failed alert to its intended recipient.
3. Decided whether expired alerts should be ignored after a certain amount of time.

The screenshot displays the 'Alert Settings' page with three main sections:

- White List Filtering:** A toggle switch labeled 'White List Filtering:' is currently set to 'OFF'.
- Search Active Directory:** A search interface with a text input 'Search groups', a 'Search groups' button with a magnifying glass icon, and a large empty list box below it. At the bottom, there is an input field 'Enter group SAM account name...' and an 'Add Known Group' button with a plus icon.
- White List Groups:** A table with the title 'White List Groups: 0'. It has a search bar 'Search groups...' and a table with columns 'Group Name', 'Description', and 'Remove' (indicated by a red 'x' icon). The table is currently empty.
- Alert Settings:** A section with three settings:
  - 'Send Emails When Alert Expired By Default:' with a 'Yes' toggle switch.
  - 'Seconds To Wait Before Resending A Failed Alert:' with a text input field containing '0'.
  - 'Ignore Alerts Expired For Longer Than Minutes:' with a text input field containing '0'.A 'Save' button is located at the bottom of this section.

Figure 76: Alert Settings

## OUTAGES

The Outages page is where you can go to notify the guests of a queue that there is a problem.

To create an outage, click **Create Outage**.

1. The first section, Outage Details, is where you fill in the outages title and details.
2. The second section, Outage Options, is where outages can be set as unplanned or planned, meaning it has a schedule.

Create an outage...

**Outage Details**

**Outage Title:**  
(max: 250)

Outage title...

**Outage Details:**  
(max: 5000)

Outage details...

**Outage Options**

**Outage Type:**

☒ Unplanned

☐ Planned

Clear Outage Create Outage

Figure 77: Outage Title & Details

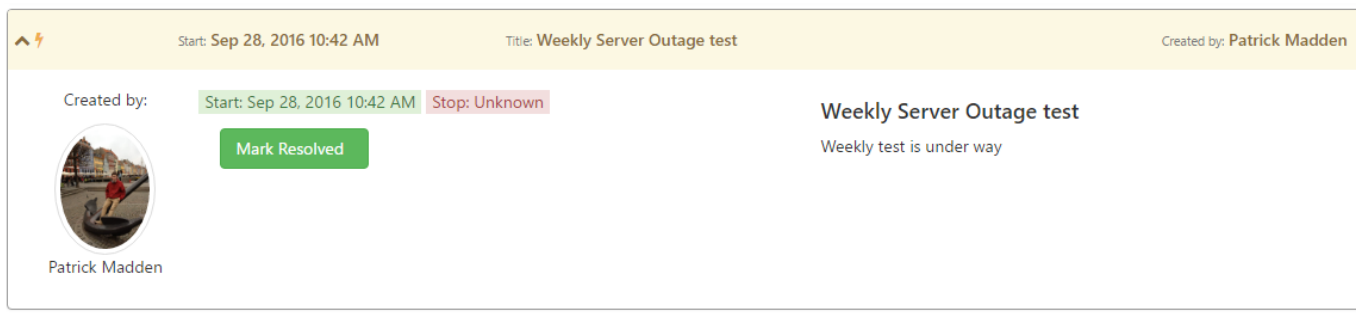
To see the details of all created outages, click **Outage History**.

This page allows you to filter through different kinds of outages and see the information for them.

IT Helpdesk Outages			
Showing All			
Active 4	Upcoming 1	Resolved 1	All 6
Start: March 14, 2016 1:45 PM	Title: Weekly server outage test	Created by: Justin Moore	Delete
Start: March 14, 2016 1:43 PM	Title: Seekers Cannot Access Email	Created by: Patrick Madden	Delete
Start: March 14, 2016 1:42 PM	Title: Backup server will be temporarily be going down	Created by: Justin Moore	Delete
Start: March 14, 2016 1:41 PM	Title: Snow Storm Today	Created by: Patrick Madden	Delete
Start: March 26, 2016 12:00 AM	Title: Planned outage during Easter	Created by: Justin Moore	Delete
Start: January 14, 2016 11:55 AM	Title: Server is down	Created by: Andrew Robertson	Delete

Figure 78: Outage History

This is an example of an expanded outage in the outage history.



Start: Sep 28, 2016 10:42 AM Title: Weekly Server Outage test Created by: Patrick Madden

Created by: Start: Sep 28, 2016 10:42 AM Stop: Unknown

Mark Resolved

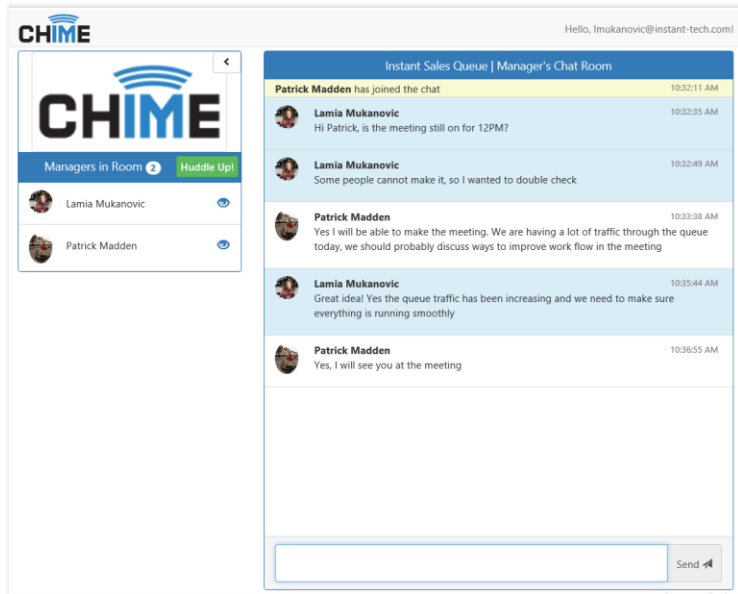
Weekly Server Outage test

Weekly test is under way

Figure 79: Expanded Outage

## MANAGER CHATROOM

This chatroom is for Managers only. It allows them to exchange conversations quickly in each queue. The **Huddle Up!** button sends all Managers in the queue a notification when a conversation in the chatroom is started.



CHIME Hello, lmukanovic@instant-tech.com!

Instant Sales Queue | Manager's Chat Room

Patrick Madden has joined the chat 10:32:11 AM

Lamia Mukanovic 10:32:35 AM  
Hi Patrick, is the meeting still on for 12PM?

Lamia Mukanovic 10:32:49 AM  
Some people cannot make it, so I wanted to double check

Patrick Madden 10:33:38 AM  
Yes I will be able to make the meeting. We are having a lot of traffic through the queue today, we should probably discuss ways to improve work flow in the meeting

Lamia Mukanovic 10:35:44 AM  
Great ideal! Yes the queue traffic has been increasing and we need to make sure everything is running smoothly

Patrick Madden 10:36:55 AM  
Yes, I will see you at the meeting

Figure 80: Manager Chatroom

## CHAT ROUTING

Once a queue has been created and agents have been provisioned, guests can send out chat requests that will route to agents in the queue. Whether the request is sent from Lync or the Chime Web Client, the Chime engine will look for agents who are available, and based on routing and priority settings, will notify the appropriate agent that there is an incoming request. The notified agent can accept or decline. If the agent declines, the chat will be routed to the next appropriate agent. If the queue is unavailable or disabled, guests will receive a message notifying them that no agents are available.

Chime has the ability to route chats two different ways:

1. Start a chat using Lync
2. Start a chat using the Chime Web client

## STARTING A CHAT WITH A QUEUE

### LYNC

To send a message using a Lync client, a user must add the dispatcher account to their Lync client. If the dispatcher account is online, then there are agents available and a chat request can be sent out by simply sending a message to the dispatcher. The dispatcher will then notify the user that an agent is being located.

### WEB CLIENT

To start a message using the Chime Web Client, a user simply needs to click on the **Launch Web Client** button that is located on each queue dashboard. This link can be staged in any number of locations. When the chat client starts, users will be prompted to fill out their name, e-mail, and question. Then, the web client will attempt to route the chat to an agent who is available in the queue.

Here is an example of what the Chime Web Client will look like:

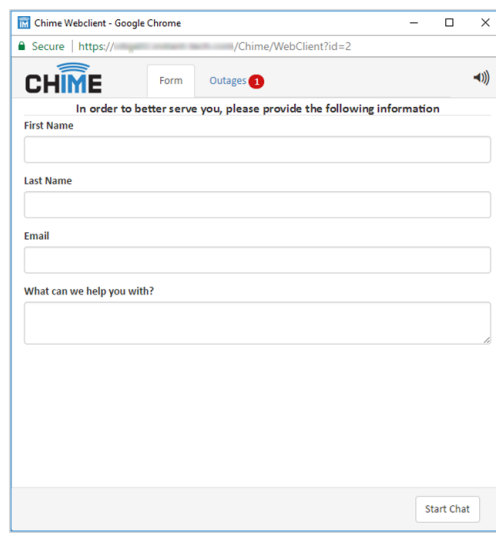


Figure 81: Chime Web Client

## ACCEPTING A CHAT

People who have been added into one queue or multiple queues will be able to accept chat requests from those queues and will be connected with people who send out requests to the queue. When a guest sends out a chat request and an expert is available to accept it, that expert will receive a prompt informing them that a request has come in, and they will have the option to accept or decline the request.

### ACCEPTING A CHAT REQUEST

For an incoming request in Lync, the dispatcher will contact one of the provisioned experts, and wait for a set amount of time for a response. If the person responds by sending 'y' as a message back to the dispatcher, Chime will connect the Agent with the guest by creating a multiparty conference. The dispatcher will sit in the conference to monitor and handle the conversation, and the Guest and agent will be able to chat directly with the Agent. Users will also have all the capabilities of the Lync client available to them during the conversation. To accept requests, you must be signed in to your Lync client and your status must be available.

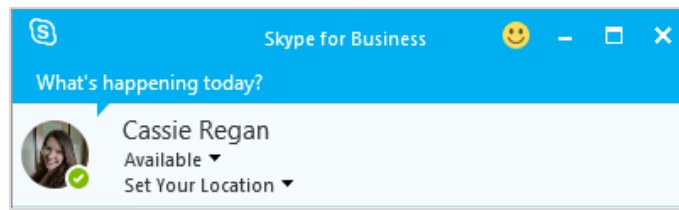


Figure 82: Agent online and available

Follow these steps to accept a chat request:

1. **Click on the blue notification** in the bottom corner of the screen to open the chat window with the Chime dispatcher.

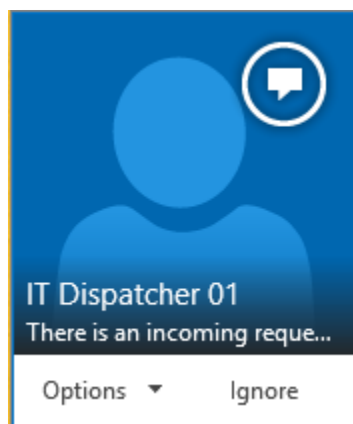


Figure 83: Chat Notification

2. Type 'y' in the new chat window to accept the chat request. **Note: You are not connected with the guest yet, you must type 'y' to accept it first.**

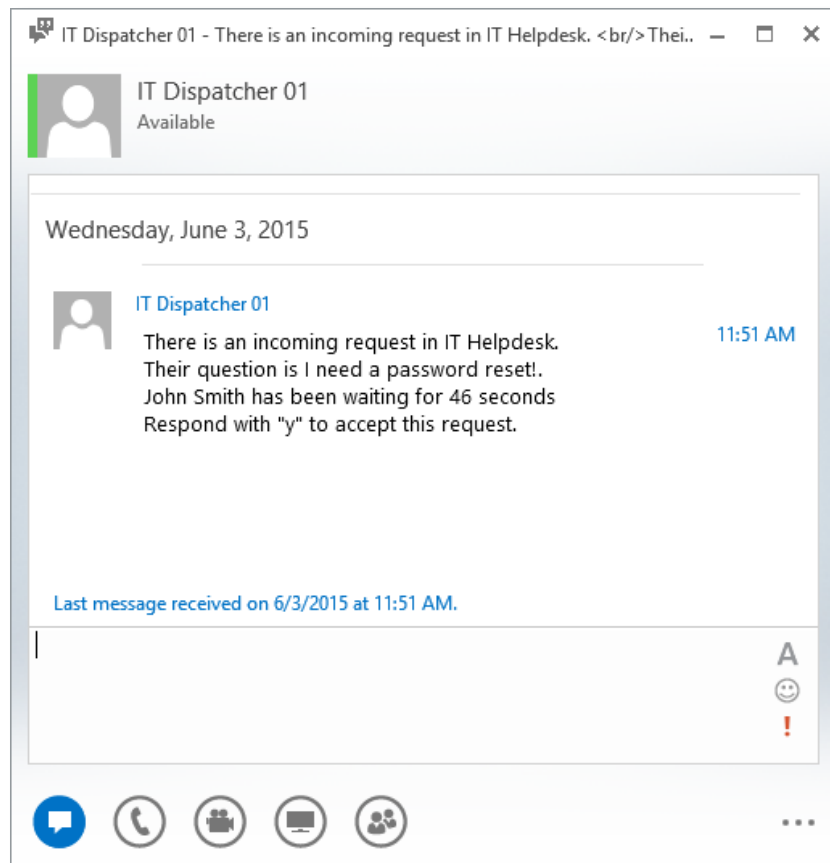


Figure 84: Incoming Request

3. You will receive a second notification for a group chat in the corner of your screen. **Click on this notification to open it. Note: This window is where you will be connected with the guest and you will be able to chat with them.**



Figure 85: IM notification



4. **A second IM window will be opened** where you are joined into a conference with the guest and the Chime dispatcher. You are now connected with the guest. You should see their question, and you can now chat with them.

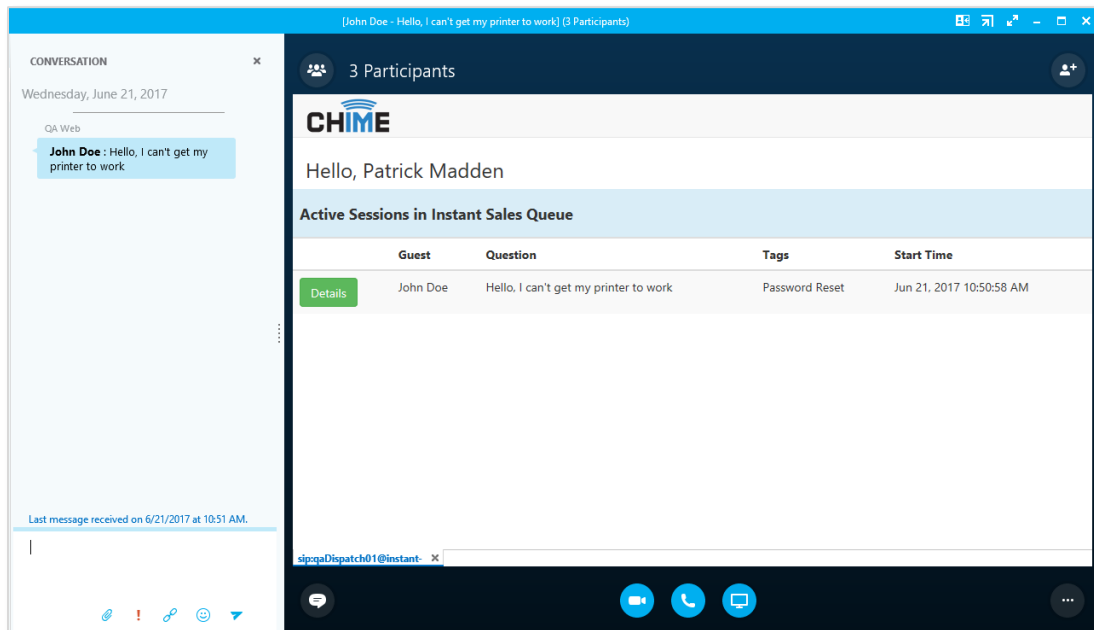


Figure 86: Guest and agent chat window

5. If you are using the Agent Assist Tool, the context window will open when you connect to the guest. There is a table that will show you the active sessions you have. To start using the Agent Context Window, click the **Details** button for the session you are currently in. **Note: you can identify the session you are in by looking at the name of the guest in the conversation history to the left of the Context Window.**
6. To end a chat session, simply close the Lync/Skype for Business conversation window.

## CONCURRENT CHATS

Agents can receive multiple chats at once. The concurrent chat property is defined at an admin level, and the maximum number of concurrent chats an agent can have is five. Once an agent's maximum concurrent chat number is reached, they will no longer receive any chats until they close out of one or more of their existing concurrent chats. For example, if an agent's concurrent chat setting is two, and they accept two chats, any additional chats will be routed to other agents who have not fulfilled their maximum concurrent or max per day number.

---

## TRANSFERRING A CHAT

Chime for Lync allows agents to transfer chat requests to other agents. If an agent is in a chat with a customer and they need assistance from another agent, they have the ability to invite an agent into the existing chat and then close out of the chat if they need to. Chime uses integrated Lync/Skype for Business features to add and transfer chats to another Agent.



Figure 87: Add Agent to Chat in Skype for Business (Left image) or Lync 2010 (Right image)

To add another Agent to the chat:

1. Click on the **Invite More People** button on your Lync/Skype for Business client.
2. Use the search bar to find the Agent you would like to add to the chat.
3. Click **OK**.
4. Once you have added in the other agent, they will receive the chat history for the session and will be able to help the Guest.
5. At this point you can stay in the chat to finish the conversation, or close the window and the session will continue with the session transferred over the Agent you added to the Chat.

## THE AGENT CONTEXT WINDOW

The Agent Context Window, or Client Window Extension (CWE), is an extension to the Lync chat window that when enabled, will pop out an additional window for agents using Chime. The context window has the ability to open up any web page, but by default it will open up a link to a page with information about the guest and the chat session.

Here is an example of the agent context window:

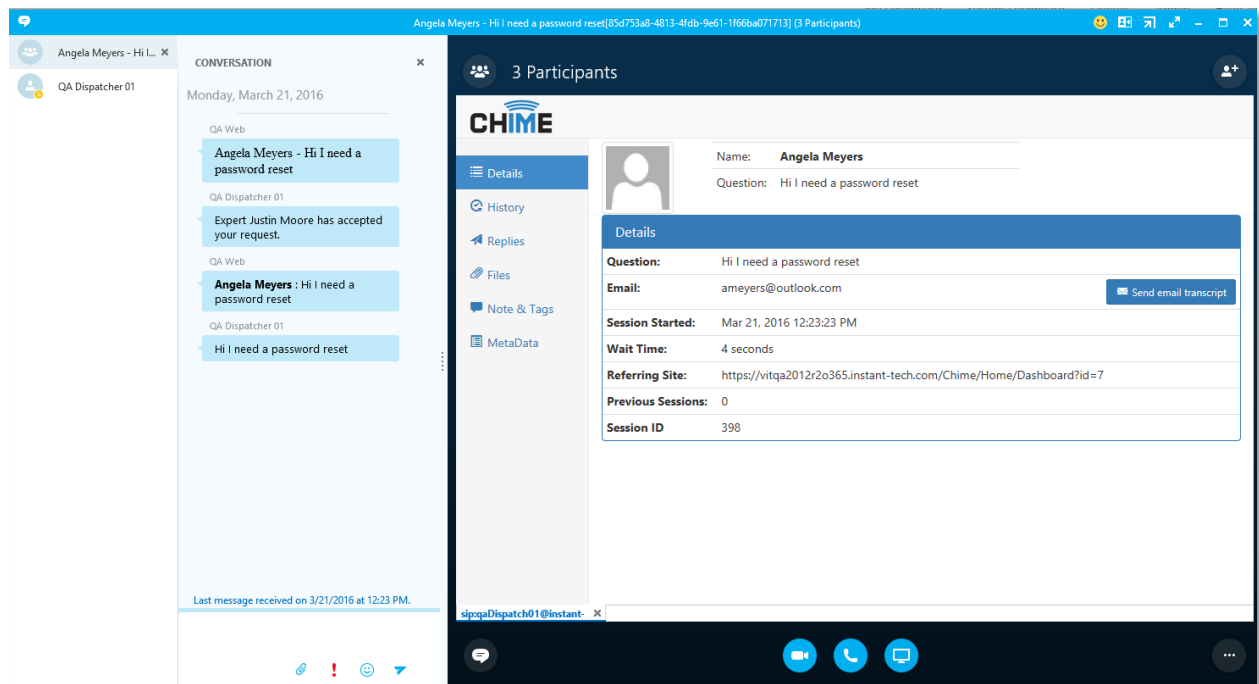


Figure 88: Agent Context Window

## INSTALLING THE AGENT CONTEXT WINDOW

The Agent Context Window is a very powerful tool that assists Agents in helping the Guests who are routed to them. This context window provides the basic details for the Guest, their previous chat history, pre-defined replies, file upload, and a tagging system and comment system so an Agent can give feedback.

Follow these instructions to install and enable the agent context window in Lync:

1. **Log in** to the Chime application using your domain credentials (URL will look something like this: `< SERVER_ADDRESS/Chime >`)
2. Click on the **Download Agent Assist Tool** button from the Agent Dashboard.

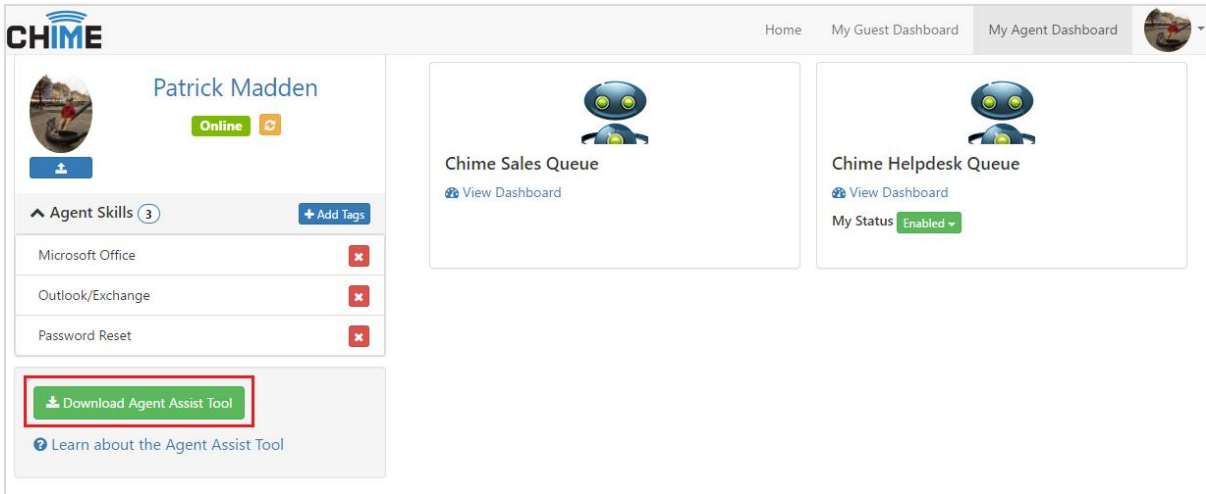


Figure 89: Download CWE Setup

3. Click **'Run'** when prompted to run or save '**ChimeAgentAssist.msi**' within the browser.
4. Click **Next**.
5. If you would like to change the folder that the Agent Assist Tool is installing to, click **Browse** and choose the folder you want to install to.
6. Click **Next**.
7. Click **Install**.
8. When the installer completes the install, click **Finish**.
9. The Assist App will appear on the system tray. **Right-click** it and then click on **Settings**.

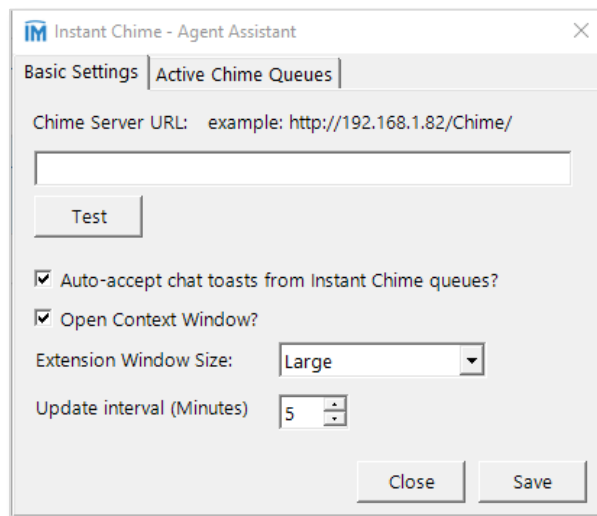


Figure 90: Agent Assist Tool

10. This will bring up the Settings for the Agent Assist Tool Settings. In the Chime Server URL area, enter the Server URL where Chime is located. **Note: make sure you include `"/chime/"`**
11. If you want chat messages to open automatically from the queues, check the box that says "Auto-accept chat toasts from Instant Chime queues?"

12. If you want the Context window to open every time you accept a chat, check the box that says "Open Context Window?"
13. Choose the size you want the context window to be: Small, Medium, or Large.
14. The update interval option determines how often the Agent Assist Tool checks the Queue's presence. It is recommended to keep it at 5
15. Click the **Save** button on the bottom right of the window.
16. Click on the **Active Chime Queues** tab.
17. Click the **Refresh Queue List From Server** button and make sure that all of the queues you are in show up in the list.
18. Close the Agent Assist Tool.
19. The setup of the CWE is complete.

## USING THE AGENT CONTEXT WINDOW

There are six tabs in the agent context window: Details, History, Standard Replies, Files, and Notes & Tags. This section will go over each tab and all of the features and functions available to agents in the context window.


### DETAILS

The Details tab is the first tab that an agent sees in the context window when connected with a guest. This window shows details about the guest or customer, such as their full name, question, contact information, and wait time.

Guest: John Doe <span>Authenticated</span>	
<b>Question:</b>	Hello, I can't get my printer to work
<b>Email:</b>	jdoe@email.com <a href="#">Send email transcript</a>
<b>Session Started</b>	10:50:58 AM
<b>Wait Time</b>	00:00:04
<b>Referring Site</b>	Not Available
<b>Previous Sessions</b>	2
<b>Session ID</b>	53465

Figure 91: Details Tab

## HISTORY

The History tab shows the previous questions that the guest has had. **Click on the  button** to view previous chats that the guest has had.







<div> <b>Guest:</b> John Doe <b>Question:</b> Hello, I can't get my printer to work</div> <div> <b>Authenticated</b></div>					
Details	<b>Date</b>	<b>Question</b>	<b>Agent</b>	<b>Session</b>	<b>View</b>
History	May 17, 2017 1:15 PM	I am having trouble getting my printer to work. Can someone help?	Patrick Madden	44574	
Replies	May 17, 2017 1:14 PM	I am having trouble getting my printer to work	No expert assigned	44573	
Files					
Notes & Tags					
MetaData					

Figure 92: History Tab

## REPLIES

In the Standard Replies tab, agents have access to the standard replies that have been added to the queue that they are in. **Click on the  button** to send a standard reply message to a customer. Additionally, you can **click on the  button** to edit the standard reply before you send it. **Note:** **Standard replies must be added to queue settings by a manager or administrator.**











<div> <b>Guest:</b> John Doe <b>Question:</b> Hello, I can't get my printer to work</div> <div> <b>Authenticated</b></div>					
Details	<b>Standard Replies</b>				
History	<b>Name</b>	<b>Body</b>	<b>Type</b>	<b>Language</b>	
Replies	Join Conference	Join online conference: {ConferenceUri}	TXT	English	 
Files	Session Rating	Here is a link for you to rate the session: {SessionFeedbackUri}	TXT	English	 
Notes & Tags	WebLink AddChime	For any info about Chime you can click here to visit our website	WebLink	English	 
MetaData	Welcome	Hello {SeekerFirstName}, I am here to help you out. Could you please tell me how you encountered the issue you have?	TXT	English	 

Figure 93: Replies Tab

## FILES

Any files that have been uploaded in the chat will be located in the Files tab. Agents have the ability to send documents and pictures to customers, and customers can send files to agents as well. **Click on the 'Upload' button** to send a file to a guest. Click on the 'Refresh' button to reload the list of files, if any have been uploaded.

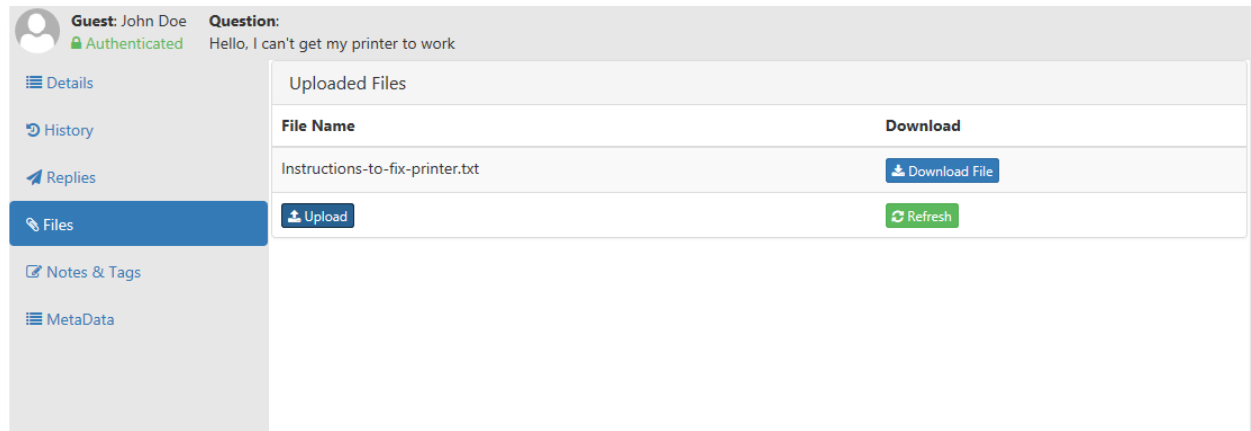


Figure 94: Files Tab

## NOTES & TAGS

In the Comments & Tags section, agents can mark sessions as resolved as well as attach session tags to the session. Resolved/unresolved, session tags, and comments will all show up in chat history.

**Click on the 'Unresolved' button** to toggle and change a session to 'Resolved'.

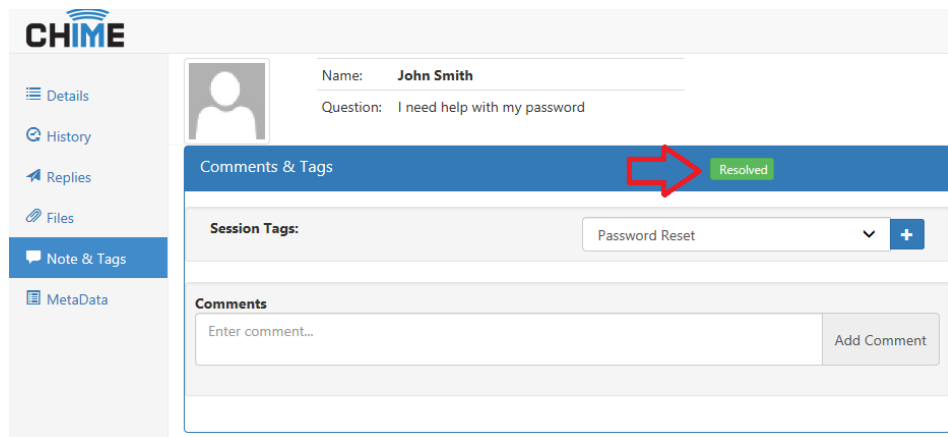


Figure 95: Notes & Tags Tab

**Click on the Session Tags drop-down menu** and pick a tag that fits the nature of the chat session. Then click the + button to attach the tag with the session.

**Add a comment** that describes what actions the agent took, or additional issues that the guest had. Ex: *I gave him a password reset and he is all set now, I gave her a license key for Microsoft Office...*

## METADATA

The MetaData tab is used to track information about the chat such as where the guest started their chat from or what skill tags they are using. This is generally in here for Virtual Agents to use, so it is not common for an agent to use this tab in chat conversations.

The screenshot shows a chat interface with a sidebar on the left and a main content area on the right. The sidebar contains a list of tabs: Details, History, Replies, Files, Notes & Tags, and MetaData. The MetaData tab is currently selected and highlighted in blue. The main content area displays the following information:

**Guest:** John Doe  
**Authenticated:** **Question:** Hello, I can't get my printer to work

**Email:** jdoe@email.com  
**Seeker[WebVisitor]:** true  
**Seeker[Hostname]:** ITINTERN02.Instant-tech.com  
**Seeker[SkillTags]:** Password Reset  
**Hostname:** ITINTERN02.Instant-tech.com  
**DomainAuthenticated:** False  
**Id:** 2  
**Queue:** 2  
**Ip:** 192.168.1.187  
**Seeker[SeekerDN]:** Web Visitor491181  
**WebVisitor:** True  
**Virtual Agent Custom Tab 1:** http://www.google.com  
**LastName:** Doe  
**SeekerDN:** John Doe  
**SkillTags:** Password Reset  
**Question:** Hello, I can't get my printer to work

Figure 96: MetaData Tab



## MY AGENT DASHBOARD

The Agent Dashboard is a tool that gives an agent a lot of information about their chats they have taken and statistics. When you first navigate to the Agent dashboard, you will see information about your chime state, the queues you are in and Agent Skill Tags that you have. To get information about a specific queue you are in, simply click the **View Dashboard** link for the queue you would like to see.

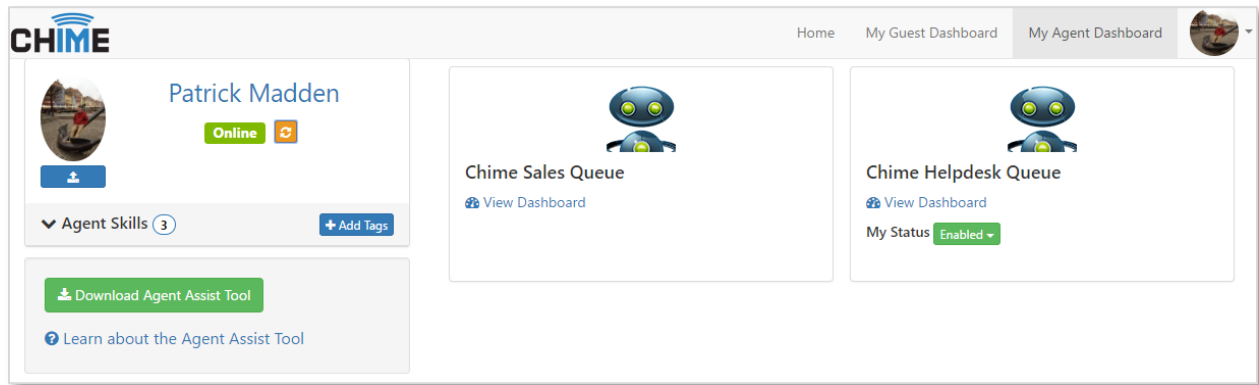


Figure 97: Queue Dashboard Landing Area

## ENABLING/DISABLING YOURSELF

Often time's queues will allow Agents to set their Chime status on the Queue Dashboard. In the image above you can see that the Chime Helpdesk Queue has a My Status option underneath the "View Dashboard" link and the Chime Sales Queue does not have the My Status option underneath it. Some queues will support this feature and some will not. Using the My Status feature allows you to set your status for the Queue as **Enabled** or **Disabled**.

The **Enabled** Status is what an Agent should be in most of the time. When in an enabled state, the Agent can receive chats, and will actively be getting new chats after they end an existing chat.

Changing your status to **Disabled** in Chime does two things, removes you from the pool of Active agents who can receive chats and allows you to start a chat with the queue. This is mainly used if an agent is away from their desk, or needs to message their own queue for testing purposes.

## USING THE DASHBOARD

In the Agent Dashboard you can see the statistics for your chats over time and your Lync/Skype for Business status on the grey bar spanning the page. Below that, you will see information about the Queue. The online/offline status of the queue will be displayed there along with four tabs with information about the agents in the queue: Active, Agents Online, View History, and Legacy Dashboard.

## ACTIVE

The Active tab shows information about the active chats you currently have. In this section you will be able to look at the context window for any of the current chats you are in and use any of the features it provides. For the full list of features and uses of the Agent Context Window, refer back to the Using the Agent Context Window section.

CHIME

Home My Guest Dashboard My Agent Dashboard

My Skype Status: **Online** Refresh 0 Guests Waiting 00:00:05 ASA 00:00:00 Avg Chat Duration 0% Chat Concurrency 2 Conversations

### Chime Helpdesk Queue

Online

Active 2

Agents Online 1

View History

Legacy Dashboard

### Active Chat Sessions Refresh

Guest: John Doe 1:33:59 PM

**Question:** I need help with my printer it seems to have broken and I cannot fix it

Guest: John Doe 1:37:41 PM

**Question:** Hello, I need a password reset for my Office 365 Account

No Session Selected

Figure 98: Active Sessions

CHIME

Home My Guest Dashboard My Agent Dashboard

My Skype Status: **Online** Refresh 5 Guests Waiting 00:00:35 ASA 00:2:45 Avg Chat Duration 64% Chat Concurrency 2 Conversations

### Chime Helpdesk Queue

Online

Active 2

Agents Online 1

View History

Legacy Dashboard

### Active Chat Sessions Refresh

Guest: John Doe 1:33:59 PM

**Question:** I need help with my printer it seems to have broken and I cannot fix it

Guest: John Doe 1:37:41 PM

**Question:** Hello, I need a password reset for my Office 365 Account

Guest: John Doe 1:33:59 PM

**Question:** I need help with my printer it seems to have broken and I cannot fix it

**Email:** jdoe@instant-tech.com Send email transcript

**Session Started:** 1:33:59 PM

**Wait Time:** 00:00:04

**Referring Site:** https://vpamqa01.instant-tech.com/Chime

**Previous Sessions:** 1

**Session ID:** 10

- Details
- History
- Replies
- Files
- Notes & Tags
- MetaData

Figure 99: Active Sessions Drilldown

## AGENTS ONLINE

The Agents Online tab shows you which agents in the queue are Available to take chats and which ones are Unavailable. This is helpful for agents to gauge how many chats they will be getting based on the number of waiting guests and the number of other agents online in the queue.

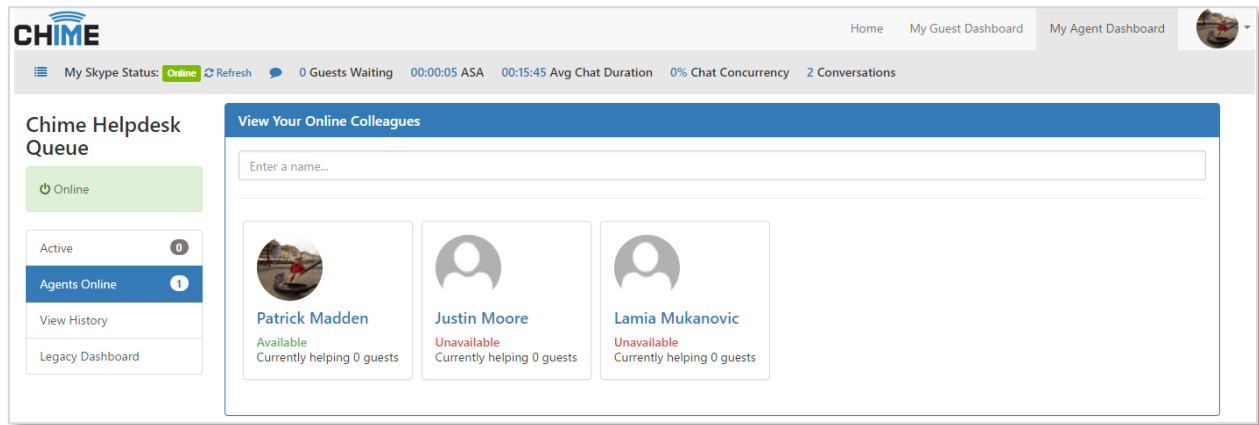


Figure 100: Available Online Agents

## VIEW HISTORY

The view History tab allows agents to look at previous chat sessions that they had and look at the session details. You are able to add tags, comments and change from resolved/unresolved from this area.

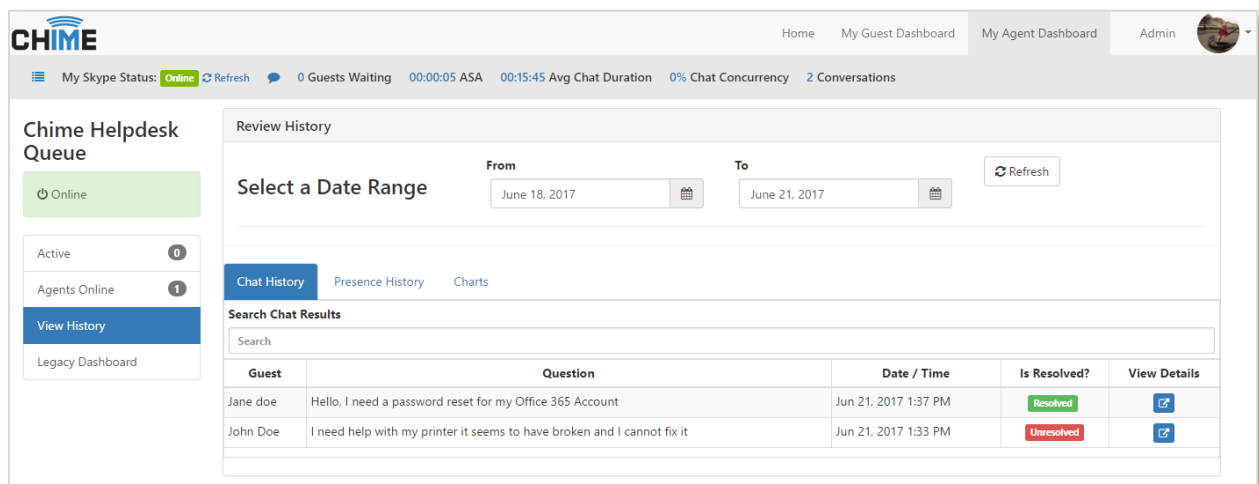


Figure 101: Chat History

## LEGACY DASHBOARD

The Legacy Dashboard tab brings you to the old Agent Dashboard. It is not recommended to use unless you have already learned how to use it in the past.