instant

CHIME

USER GUIDE

Fall 2016

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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

OVERVIEW

At a high level, Chime is designed to connect people looking for assistance with an agent who can immediately provide assistance. Chime utilizes the existing IM (some call is UC) infrastructure deployed within an enterprise to help broker and establish this connection. In Chime, agents are maintained as part of a 'queue'. Each queue has a set of properties that define how the queue will 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)
- 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

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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 against Microsoft Lync, then you will be prompted for your Windows credentials:

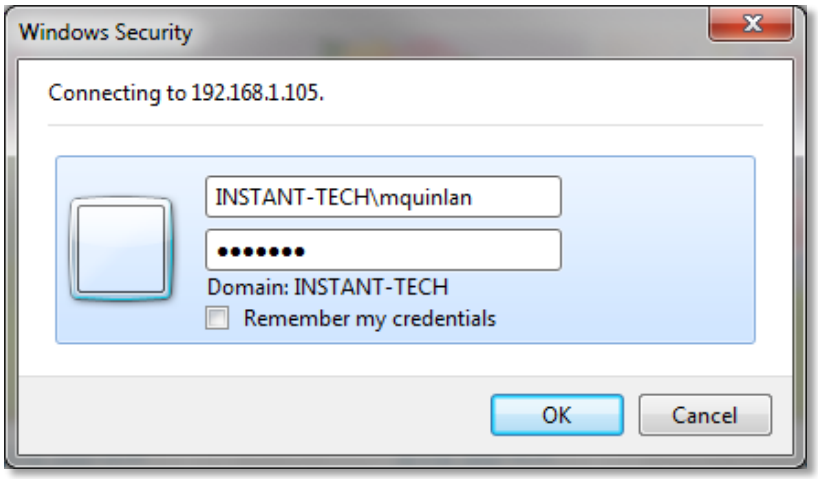

Figure 1: Windows Authenticated Login

To configure a queue, you will need to do three things:

1. Add people into the Admin section who will eventually receive chats from 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.

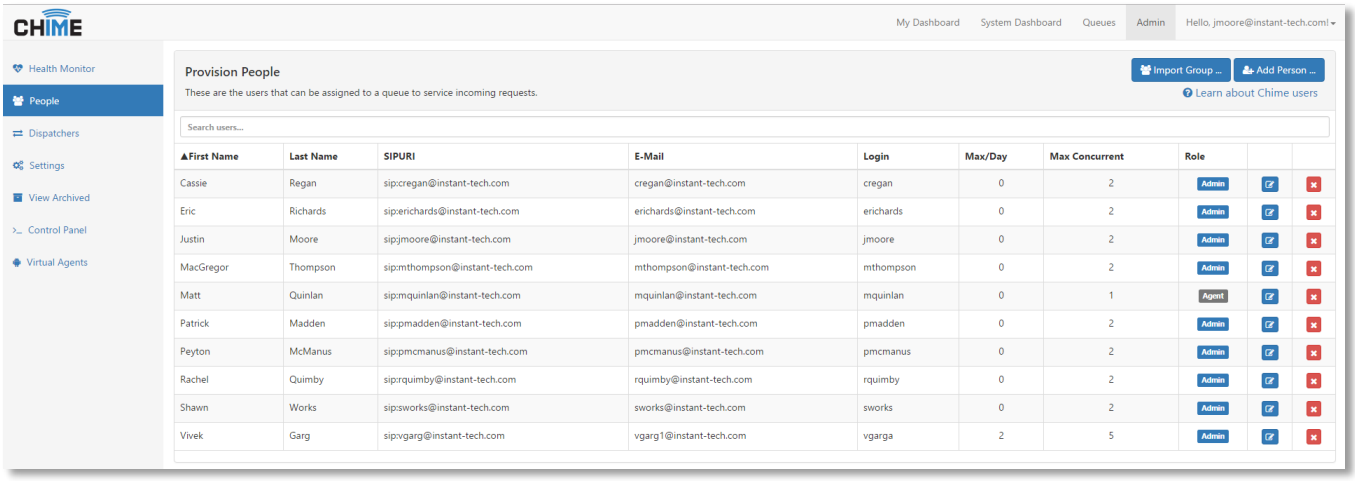

Figure 2: First look at Chime

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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.
- 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

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PEOPLE SECTION

This section is where people (agents), 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.

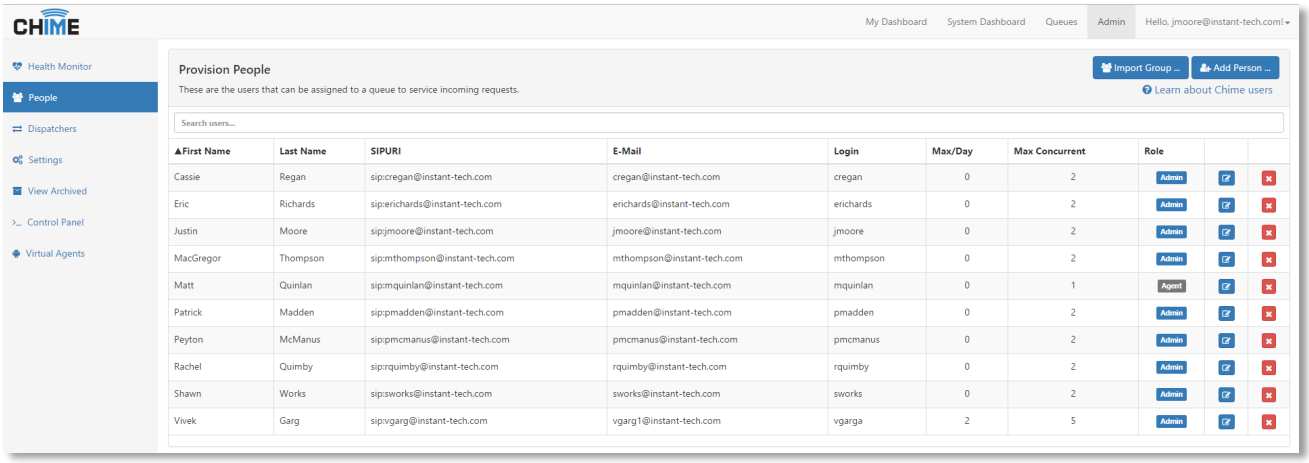

Figure 4: People Grid

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ADDING A PERSON

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

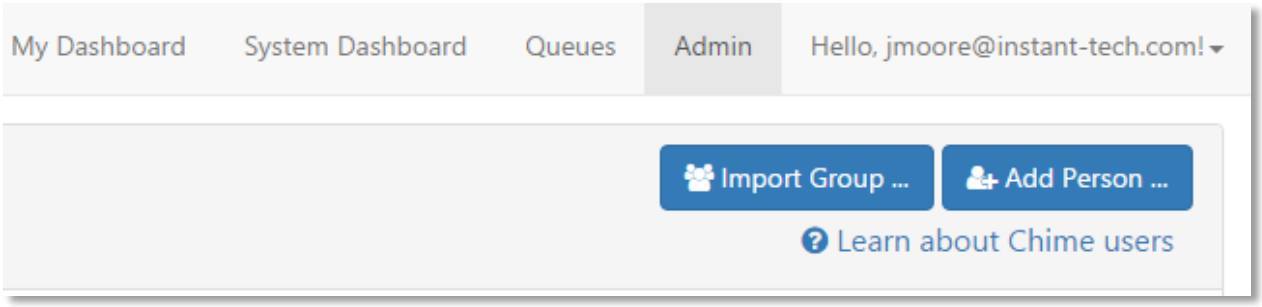

Figure 5: Adding a new person

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

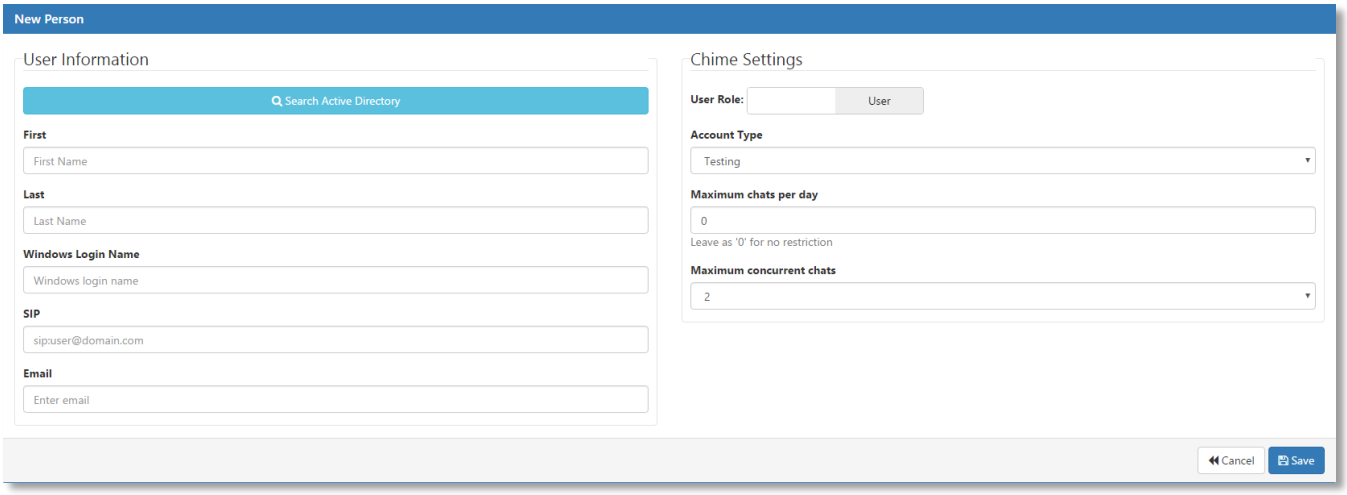

Figure 6: Chime person settings

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.

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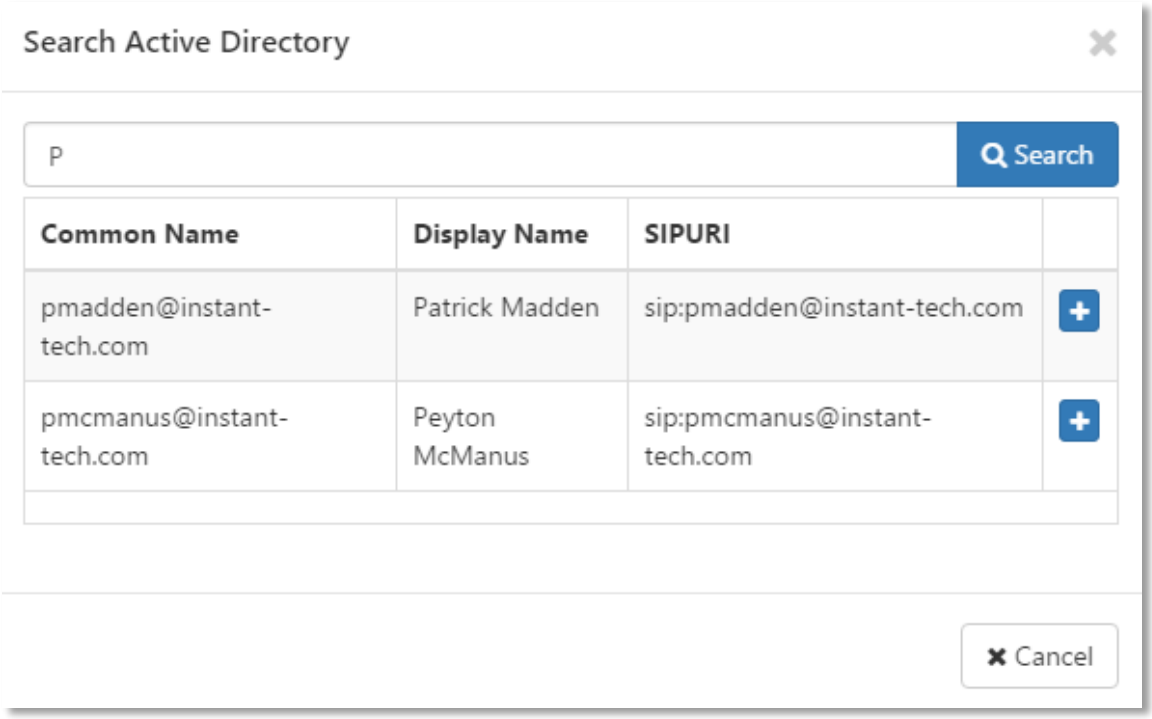

Figure 7: Selecting a user from the directory picker

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)

Skill Tags: Specific skill tags can be attached to each agent. An agent must first be added to the People section before acquiring any skill tags

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

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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.

ADDING SKILL TAGS

Click on the button to add skill tags to a specific agent. Then, click on the **Skill Tags** drop-down. **Select** a skill tag from the drop-down menu.

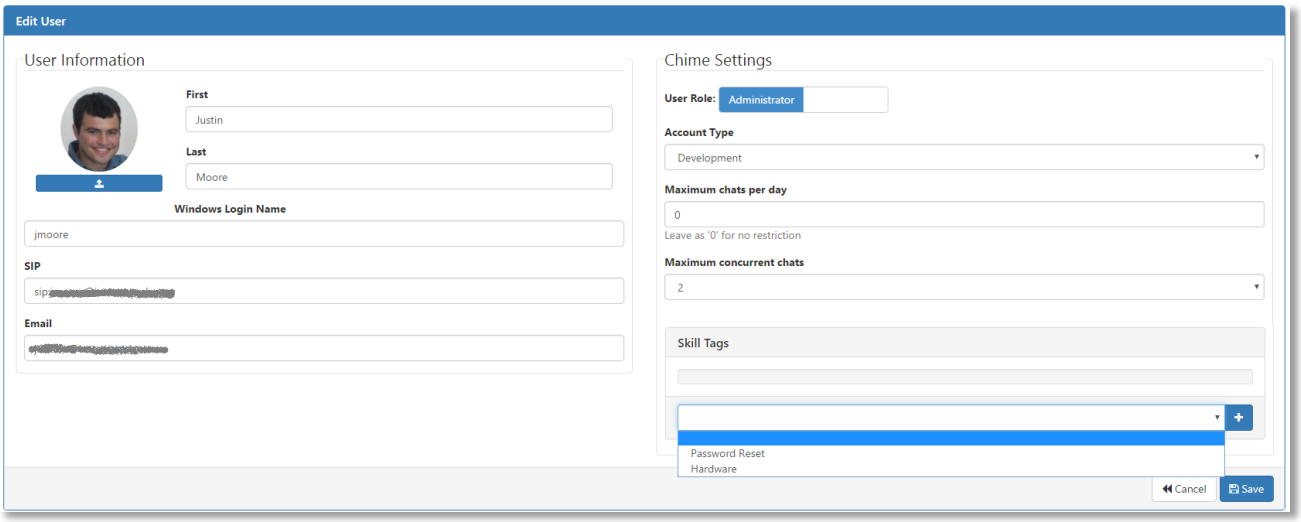

Figure 8: Skill tags

Click on the + button to add it to the agent. The selected skill tags will now be displayed in the 'Agent Skill Tags' Section

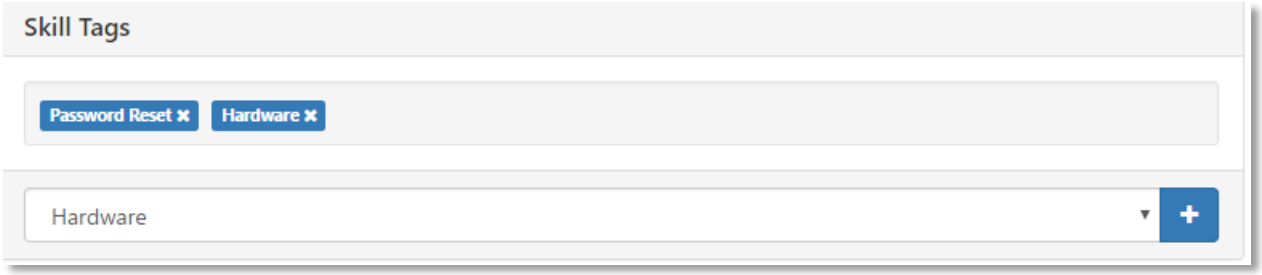

Figure 9: Selecting Skill Tags

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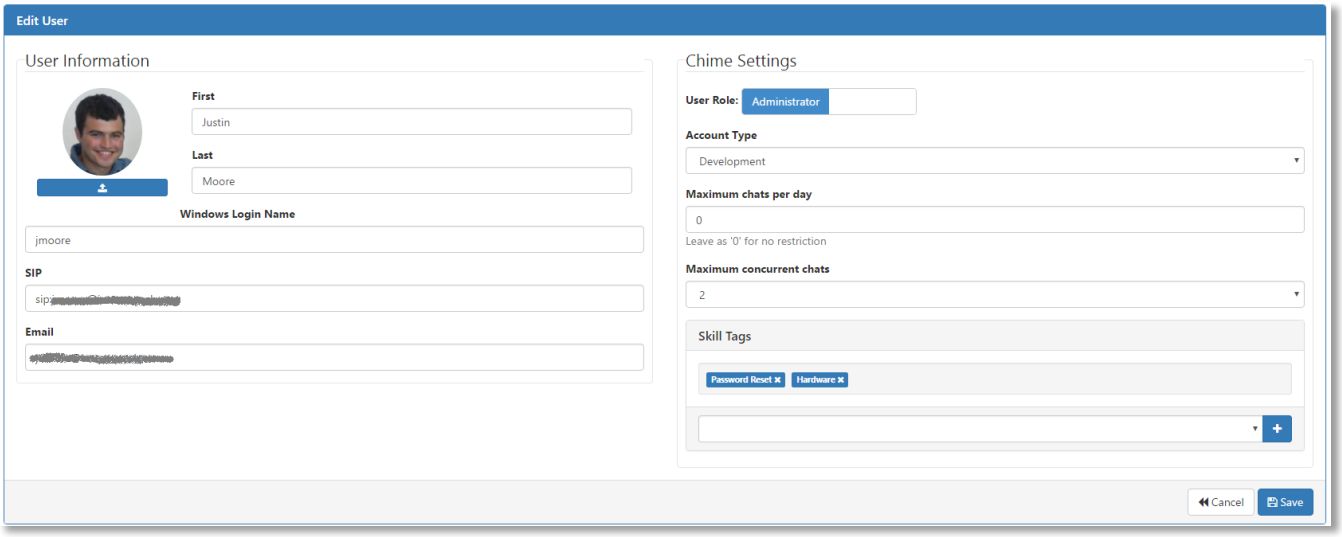

Figure 10: Agent's Skill Tags

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.

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DISPATCHERS

A dispatcher is a Lync-enabled account that is used to 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 below the grid.

This should bring up the New Dispatcher window.

SIP: 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 in to

Domain: Domain that the account is provisioned in

User: Full username of the account being used for the dispatcher

Password: Password to use when logging into the chat server

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

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

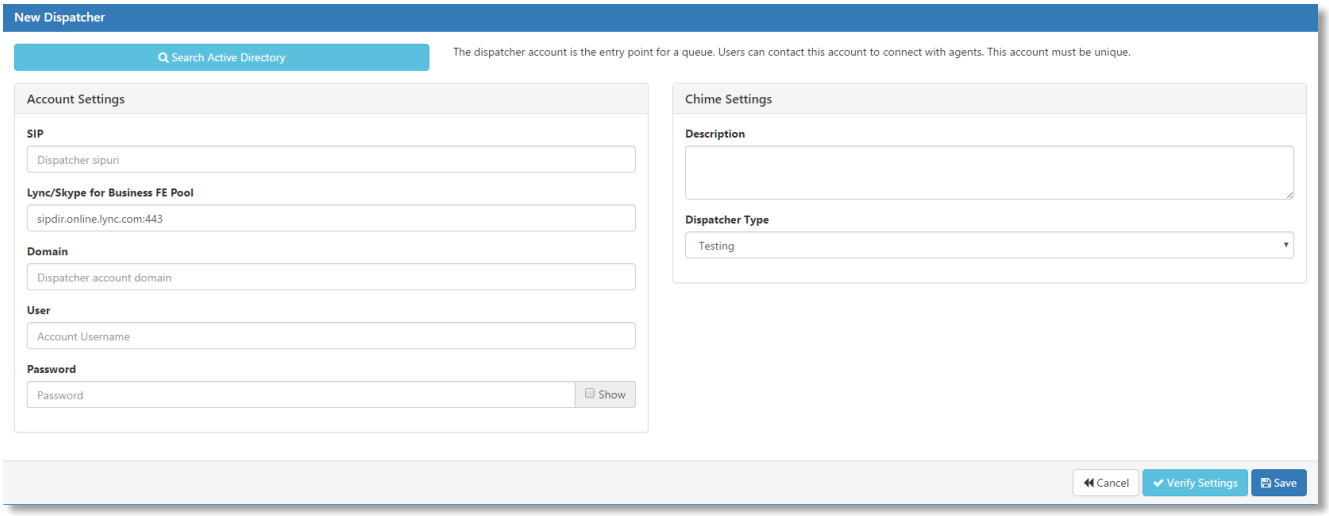

Figure 11: Chime dispatcher settings

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 dispatcher.

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.

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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, and 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.

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SETTINGS

The settings section is where you will 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.

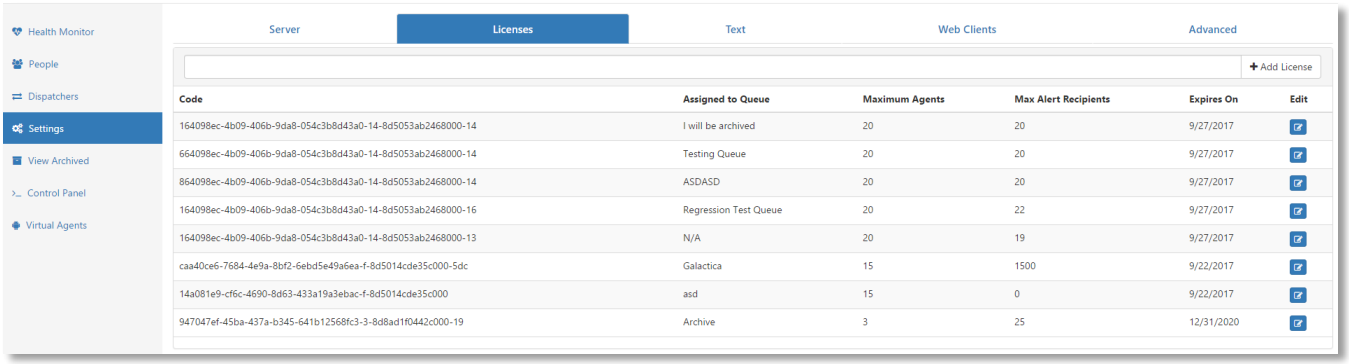
Email Settings:

- **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:** 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.

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
164098ec-4b09-406b-9da8-054c3b8d43a0-14-8d5053ab2468000-14	I will be archived	20	20	9/27/2017	
664098ec-4b09-406b-9da8-054c3b8d43a0-14-8d5053ab2468000-14	Testing Queue	20	20	9/27/2017	
864098ec-4b09-406b-9da8-054c3b8d43a0-14-8d5053ab2468000-14	ASDASD	20	20	9/27/2017	
164098ec-4b09-406b-9da8-054c3b8d43a0-14-8d5053ab2468000-16	Regression Test Queue	20	22	9/27/2017	
164098ec-4b09-406b-9da8-054c3b8d43a0-14-8d5053ab2468000-13	N/A	20	19	9/27/2017	
caa40ce6-7684-4e9a-8bf2-6ebd5e49a6ea-f-8d5014cde35c000-5dc	Galactica	15	1500	9/22/2017	
14a081e9-cf6c-4690-8d63-433a19a3ebac-f-8d5014cde35c000	asd	15	0	9/22/2017	
947047ef-45ba-437a-b345-641b12568fc3-3-8d8ad1f0442c000-19	Archive	3	25	12/31/2020	

Figure 12: License Settings

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TEXT SETTINGS

This area is where you will configure default text resources to apply those at a global level, if necessary. If you want to edit text resources at a queue level, go to Queue Settings.

A default text resource has been provided for you, but if you wish to add a new set, click on the 'New Text' button. Fill out all required fields to customize text resources. For more information on how to configure text resources, please refer to the Text Resources Section.

SKILL TAGS

This section is where skill tags are added at an administrator level. Once skill tags are defined in this section, they can be attached to specific agents in the People section. Chime provides five skill tag examples by default: Password Reset, VPN, Software Request, Hardware Request, and Other. To add more skill tags, type in the name of the skill tag, and click on the + button

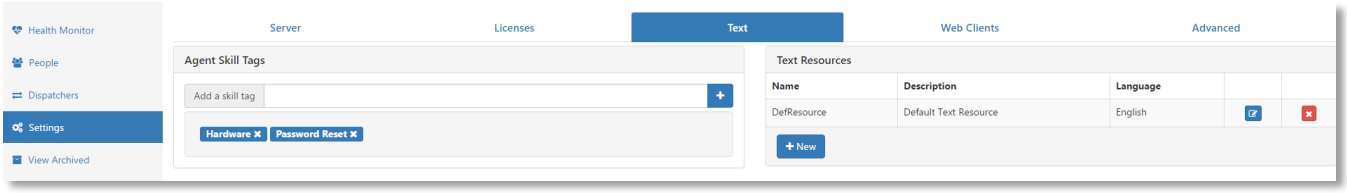

Figure 13: Skill Tags

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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.

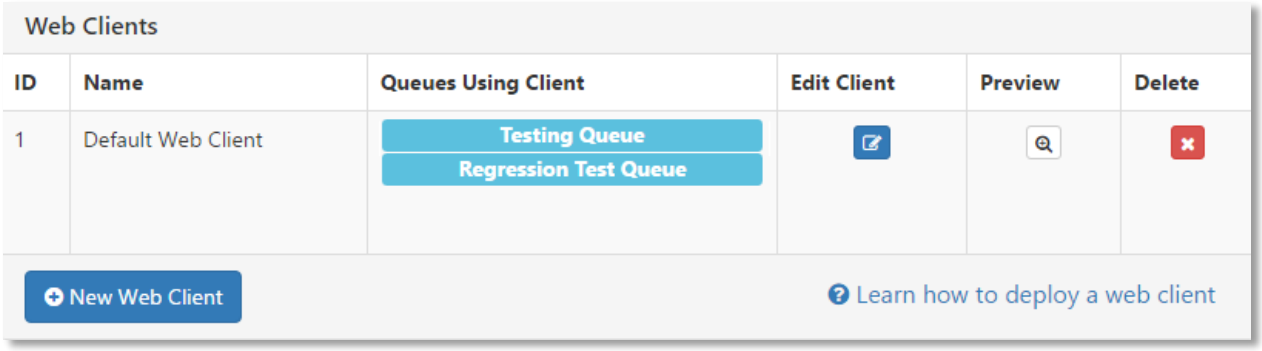

Figure 14: Web Clients

New/Edit Web Client: Starting with Chime v2.4, you have the ability to configure web client settings, upload brand images, apply custom CSS rules, and create custom pre-chat forms.

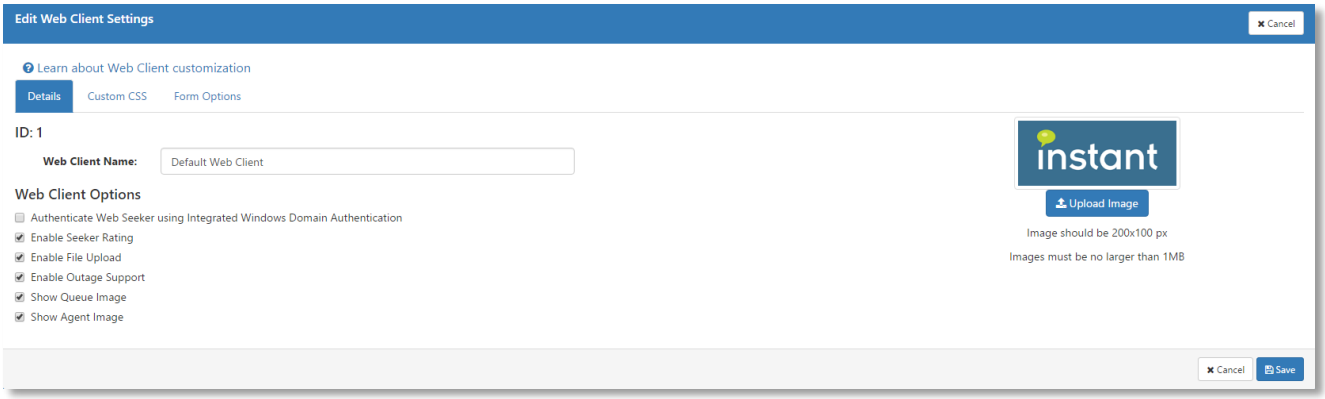

Figure 15: Web Client Form

Custom CSS can be entered directly into the text field.

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.

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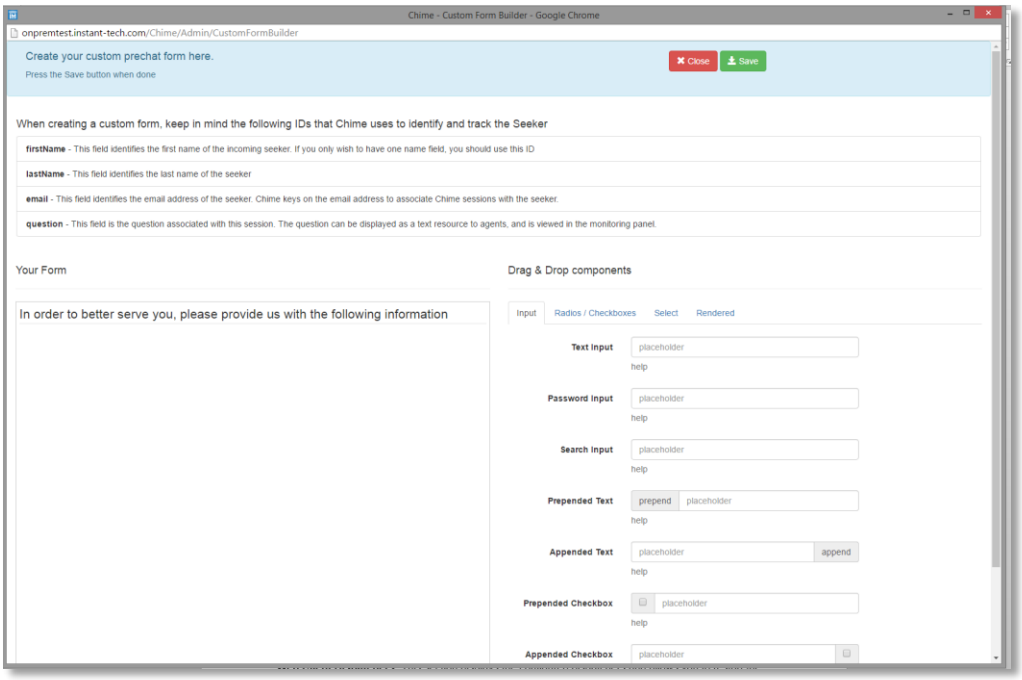

Figure 16: Custom Form Builder

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.

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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.

ChimeHub: 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. Click on **Request Activation.** You can start using ChimeHub once the request has been approved.

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 permanetly deleted from the database.

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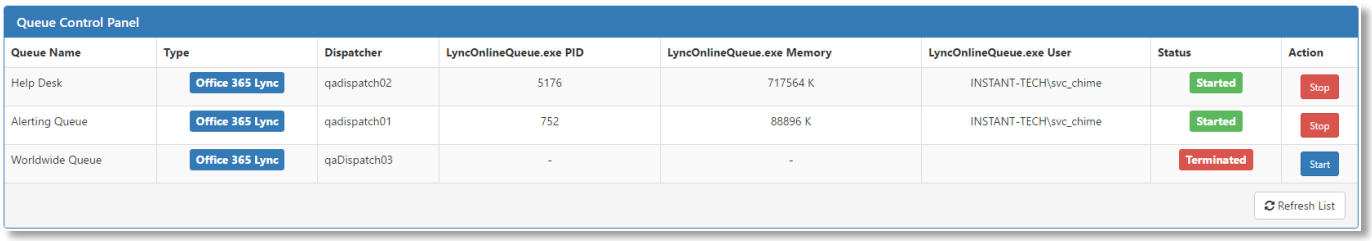
CONTROL PANEL

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 a 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 provided 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 17: 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 Lynce.exe Memory column shows the Lync client process' current memory usage, and lastly, the Lynce.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 18: 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 Lynce.exe columns discussed.

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3. On-Premise Queues

Figure 19: 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 Lynce.exe columns. The Dispatcher column should display the Skype for Business username of the Queue's dispatcher.

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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:

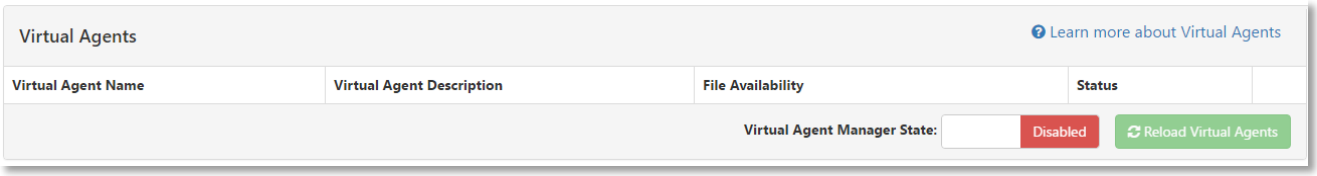

Figure 20: Virtual Agents Manager

No virtual agents are shown and the green 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.

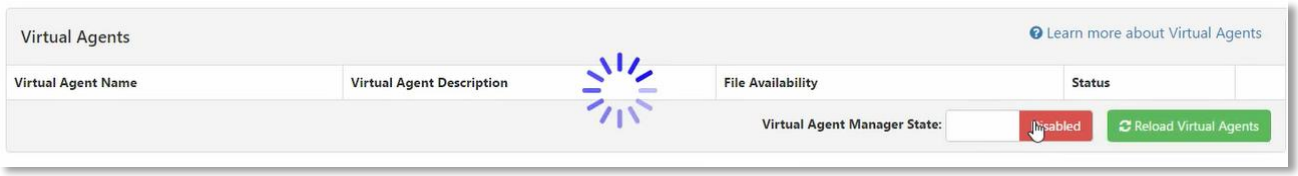

Figure 21: Enabling Virtual Agent Manager

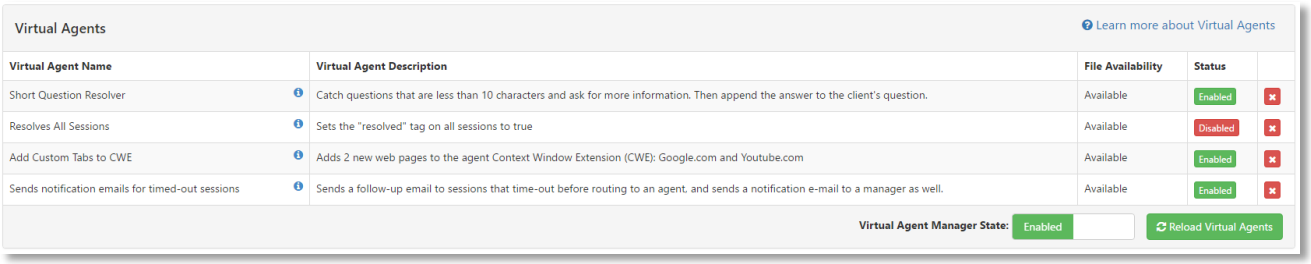

Figure 22: Virtual Agents

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

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When the global setting is turned on, notice the button on the bottom left has turned red and is labeled 'Disable Virtual Agent Manager', 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.

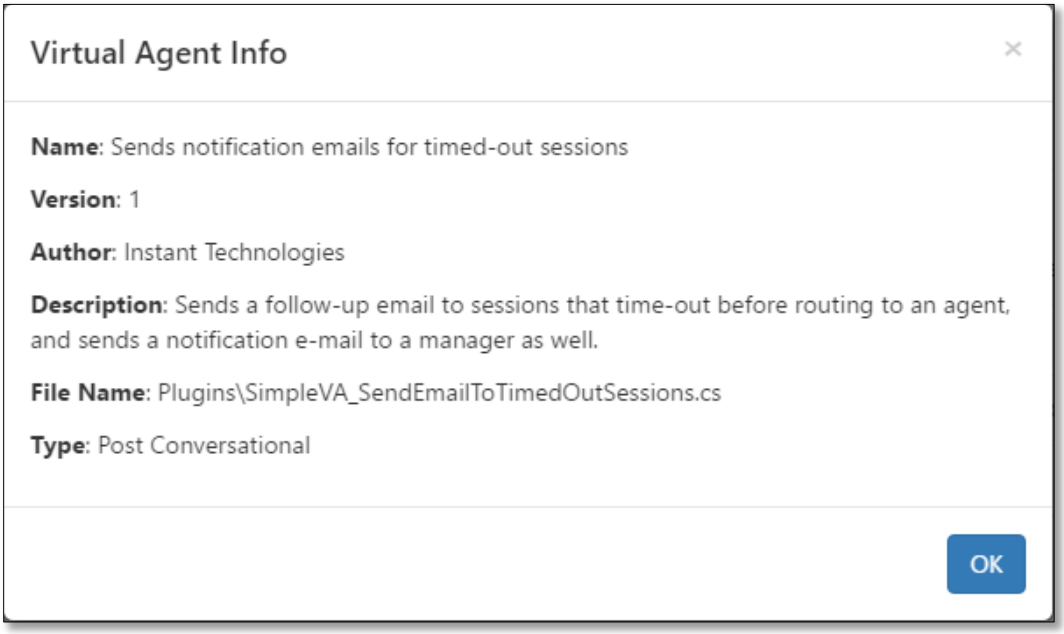

Figure 23: Virtual Agent Info

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'.

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QUEUES

The Queues 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.

ADDING A QUEUE

To add a queue, 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

Mode: Identifies the queue as being used for Testing, Development, or Production

Language: Marks the queue as being associated with a specific language

License: Select a license key that the queue will use

Web Client: A web client for to host the queue.

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.

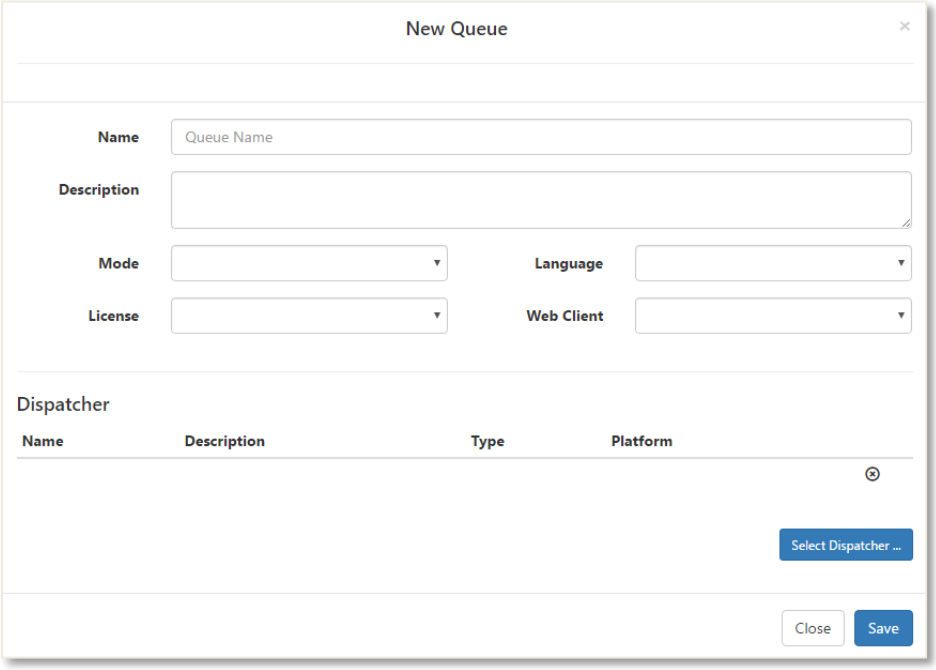

Figure 24: New Queue Settings

Click **Save** to create the new Queue

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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.

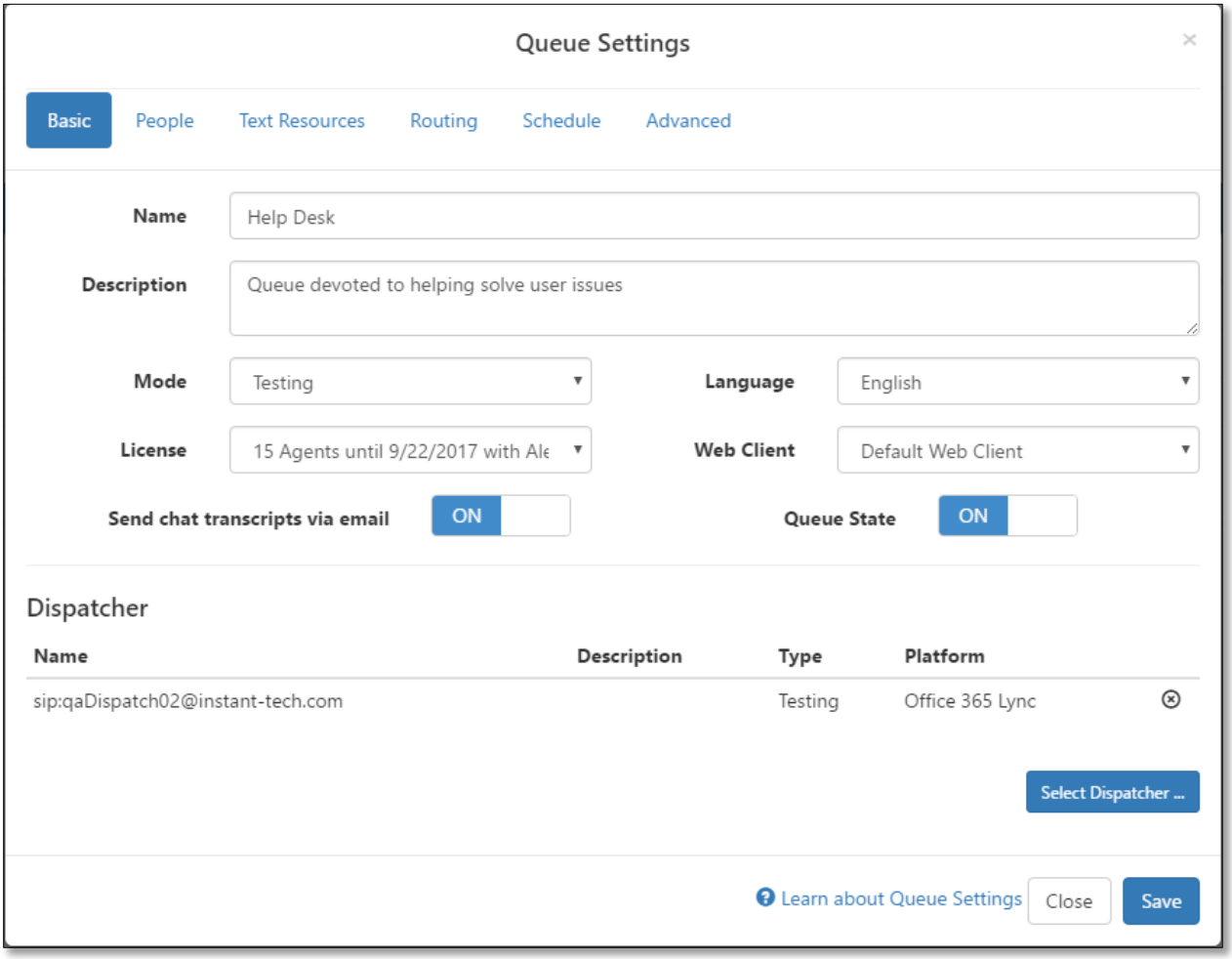

Figure 25: Edit queue settings

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BASIC SETTINGS

The basic settings page contains the same information used when you created the queue, with one additional field: **Queue State**. To activate this queue, you must click the toggle button and set it to **Enabled**, and click **Save**. This will tell Chime that the queue is ready to be used.

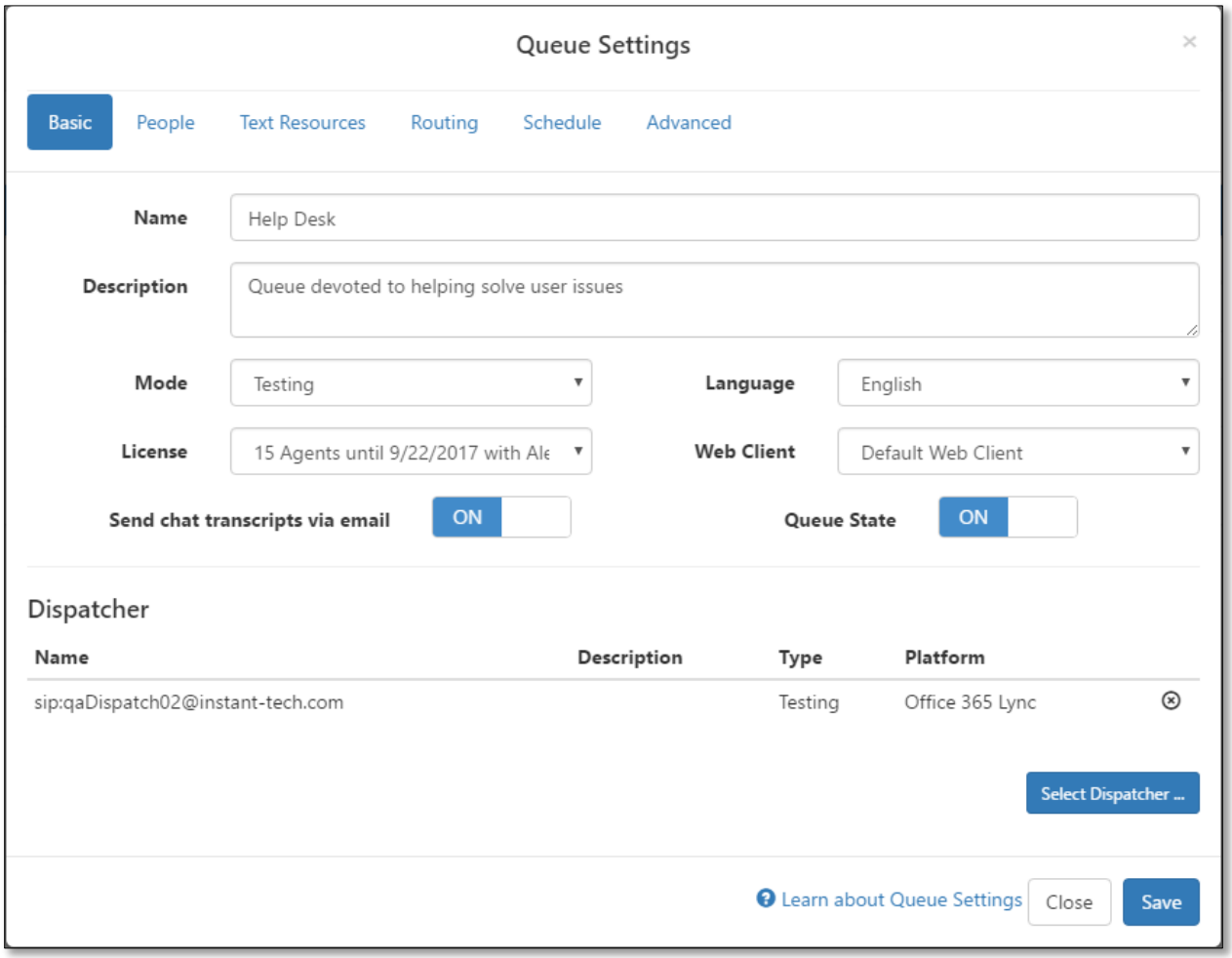

Figure 26: Basic Queue Settings

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PEOPLE

The people settings page allows you to add people that can be contacted via the queue.

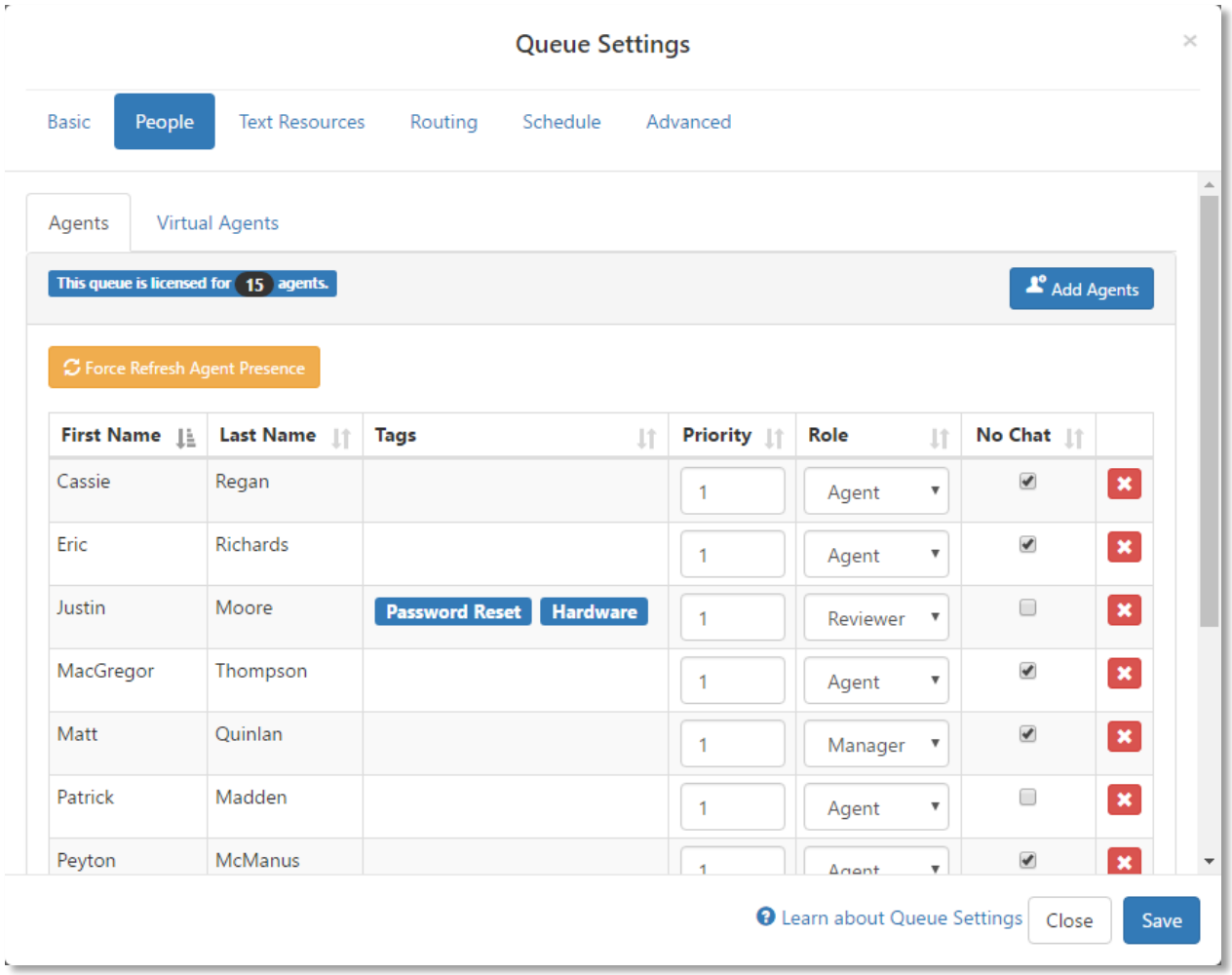

Figure 27: Queue People

You can add people to the queue by clicking on the **Add Agents** button. This will open a directory picker that displays people provisioned within Chime. You can scroll through the pages to manually select users, or you can search for specific users using the search field above the grid. To select users to add, click the icon next to their account name. Selecting a user will create a badge with their first name below the grid. You can select multiple users to add, and clicking the 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 **Save**, and they will instantly be added to the queue.

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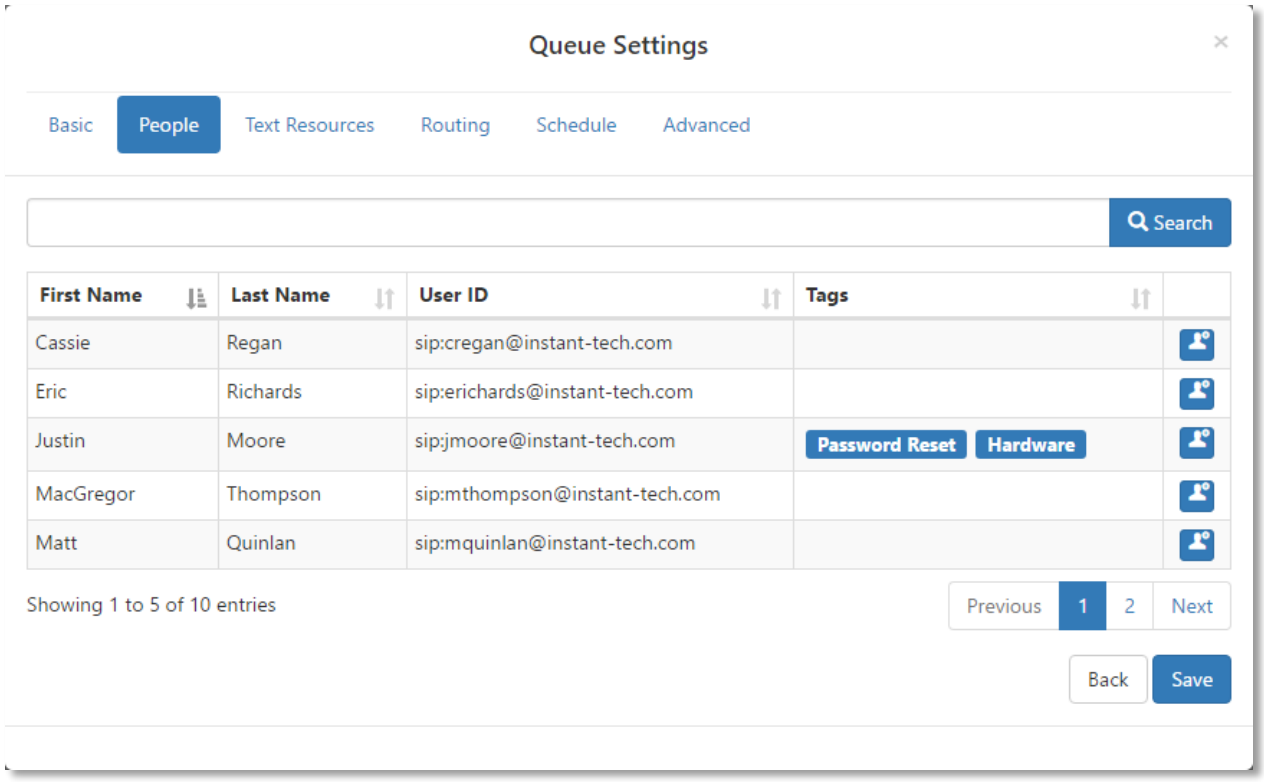

Figure 28: Selecting users from the picker

Within a queue, people have additional properties that are tied to that queue. You can set some of those properties from the people grid.

> **Tags:** Skill tags that have been provisioned for agents in Admin will show up in the '**Tags**' section.
>
> **Priority:** Priority is a setting that can be used with a 'route by priority' approach. The lower priority numbers will be contacted first, and it will escalate from 1 to 5.
>
> **Role:** Here you can configure an added users role between Agent, Manager, or Reviewer
>
> **No Chats:** Putting a user on "No Chat" will cause them to receive no chats in that queue, even if they are online

To delete a person from a queue, click the icon. Chime will confirm that you want to remove the user from the queue.

There is also a button, Force Refresh Agent Presence, which updates the agent status on Chime.

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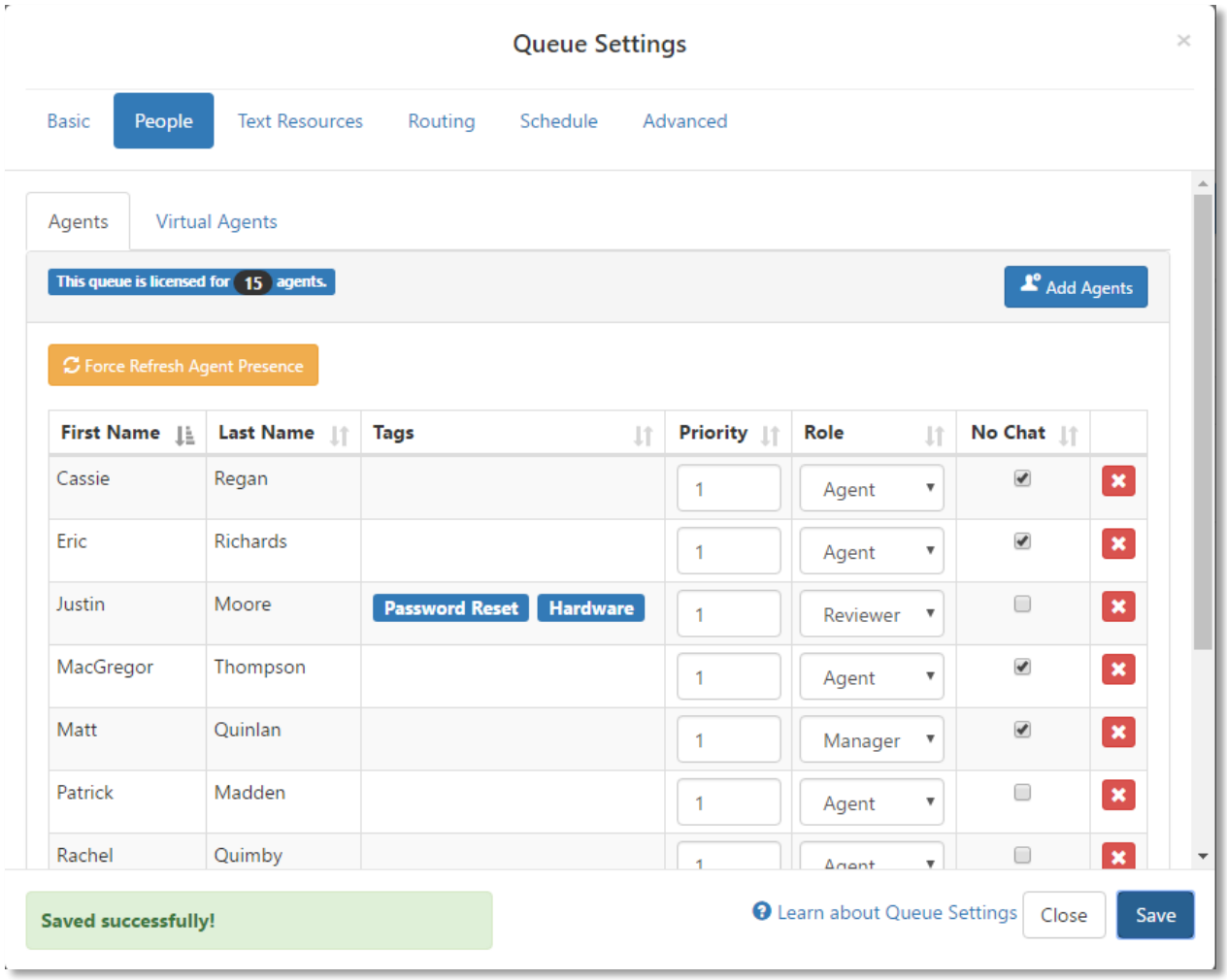

Figure 29: Queue People

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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.

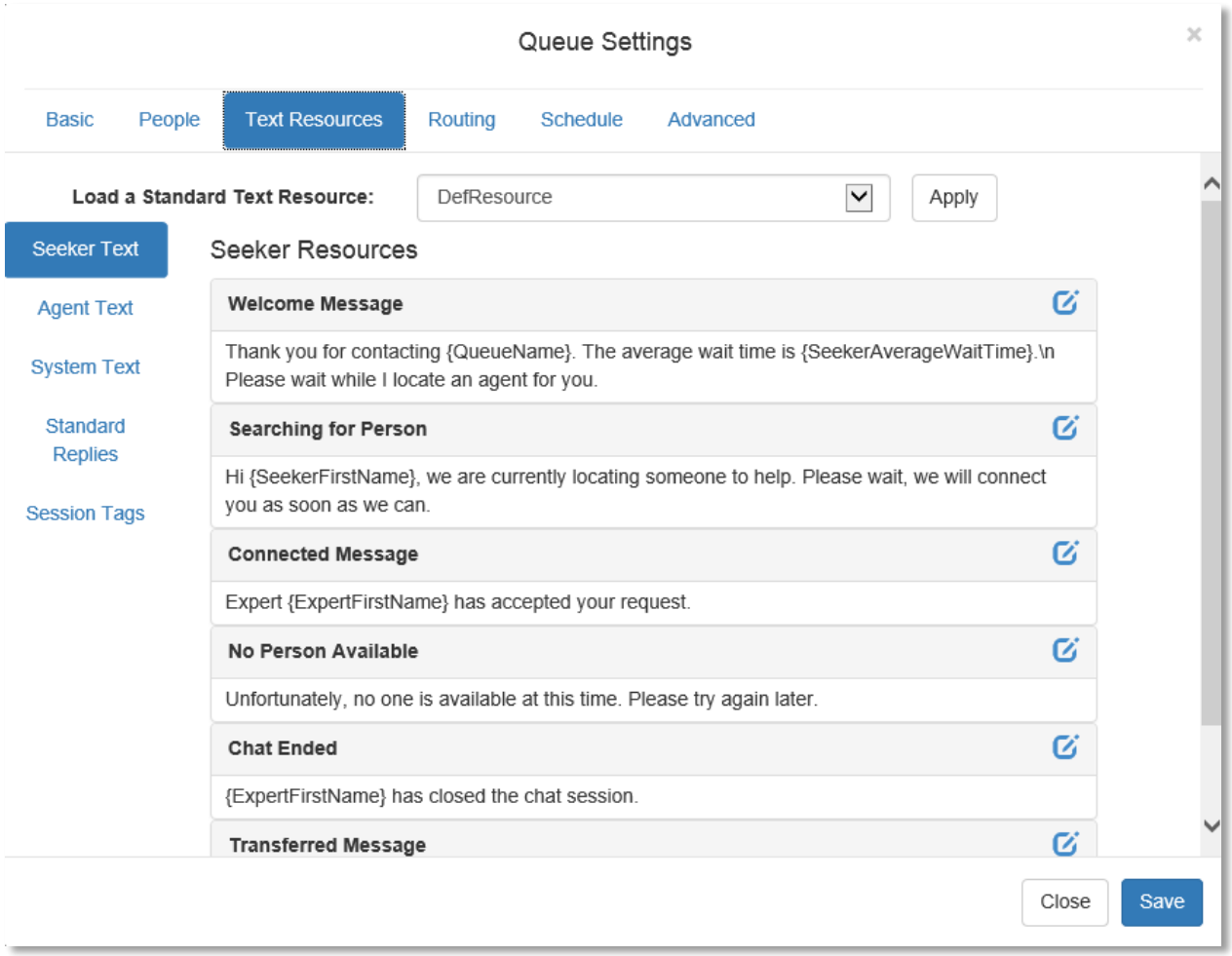

Figure 30: Queue Text Resources

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

- The **Seeker Text** is where you will find text resources that will be sent to the seekers when they encounter any activity within the queue.
- The **Agent Text** is what experts 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 create your own in the Admin section. To do this, go into **Admin > Settings > Text**, and select the **New** button. This is where you will define your own text resources.

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To use a standard resource in a queue, pick the desired standard text resource from the drop-down list, and click **Apply**. The appropriate text resources will be applied for all options. After editing any resources, you must click **Save** to apply the changes.

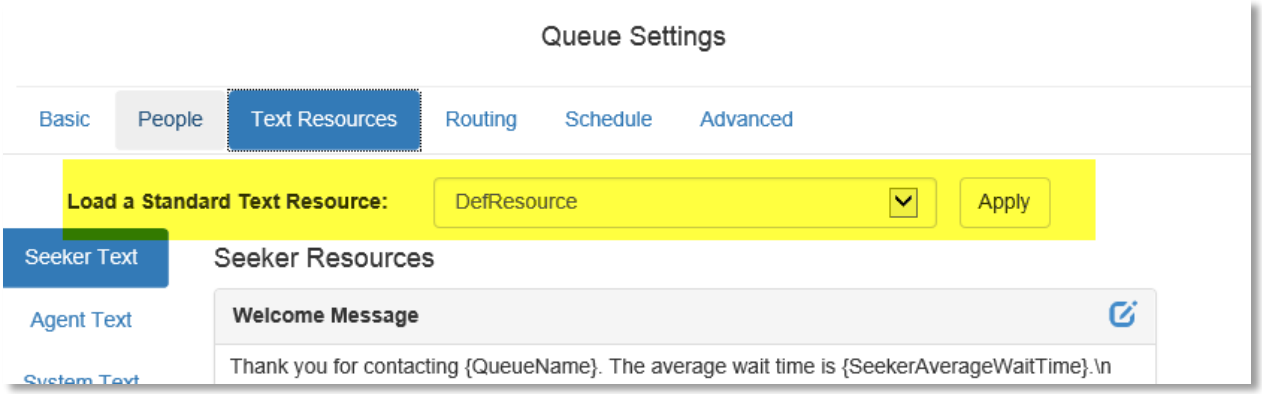

Figure 31: Apply Standard Text Resource

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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 look like once it is sent.

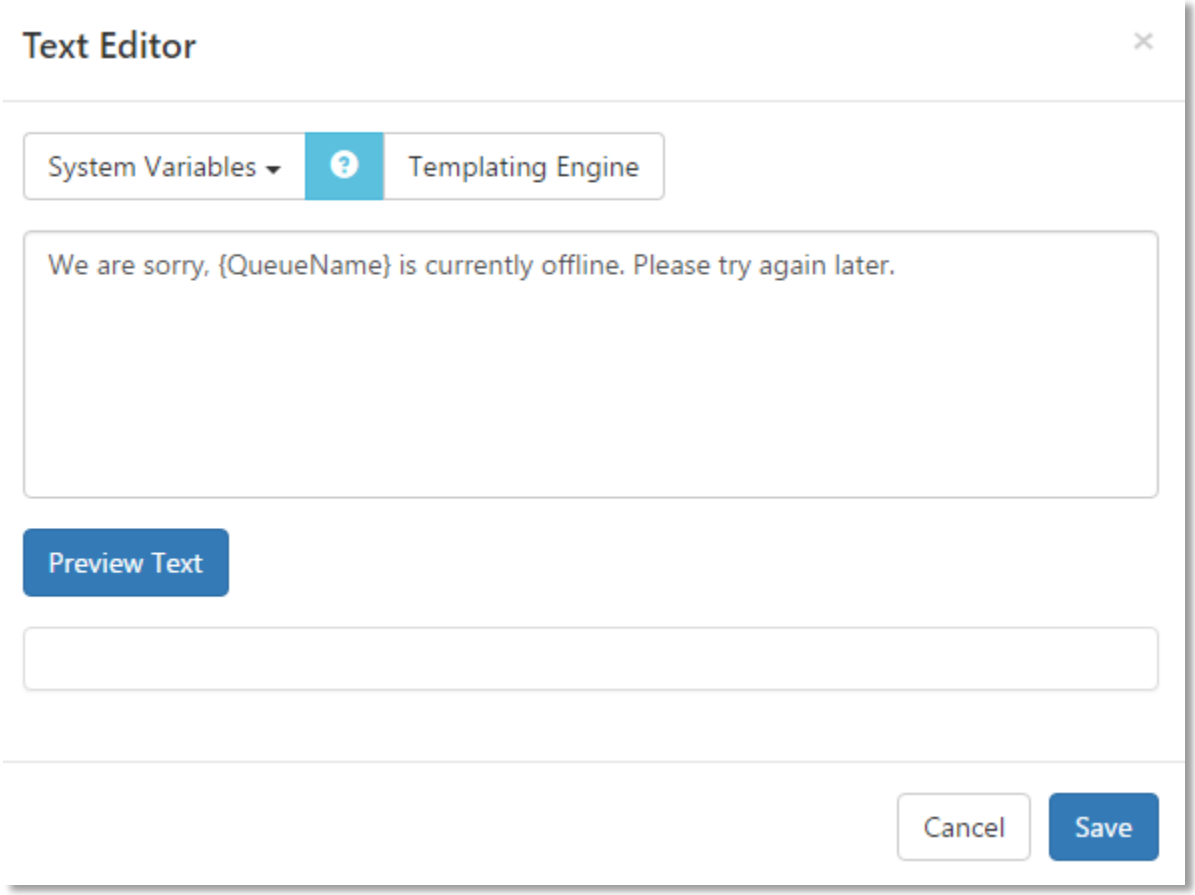

Figure 32: Customizing a Text Resource

1. Click the icon to edit a specific text resource. This will open the Text Editor modal.
2. Enter the text that you want to show for this specific text resource.
3. Click on the **System Variables** menu, if using any system variables.
4. 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.
5. Click **Save** once you are satisfied with the text resource.

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STANDARD REPLIES

Chime allows you to configure standard replies, or canned replies, for agents to use within chats. You can create new standard replies as well as edit existing standard replies.

Click on the button to edit an existing standard reply.

CREATE A NEW STANDARD REPLY

1. Go to **Queue Settings** and click on the **Text Resources** tab.
2. Click on the **Standard Replies** tab
3. Click on the **New Standard Reply** button. This will bring up the Standard Reply editor.
4. Type in a **Reply Title** for the standard reply you want to create.
5. Choose a **Reply Type**:
    a. TXT – The standard reply will be simple text
    b. Video – The standard reply will include a video
    c. WebLink – The standard reply will include a link to a web page
6. Select a **Language** for the standard reply.
7. Type in a **Reply Body.** This is the actual standard reply that customers will see. Click on the **System Variables** menu and choose the variable that you wish to include, if desired.
8. Click **Preview Text** to show a preview of the new standard reply.
9. Click **Save** when you are finished creating the new standard reply.

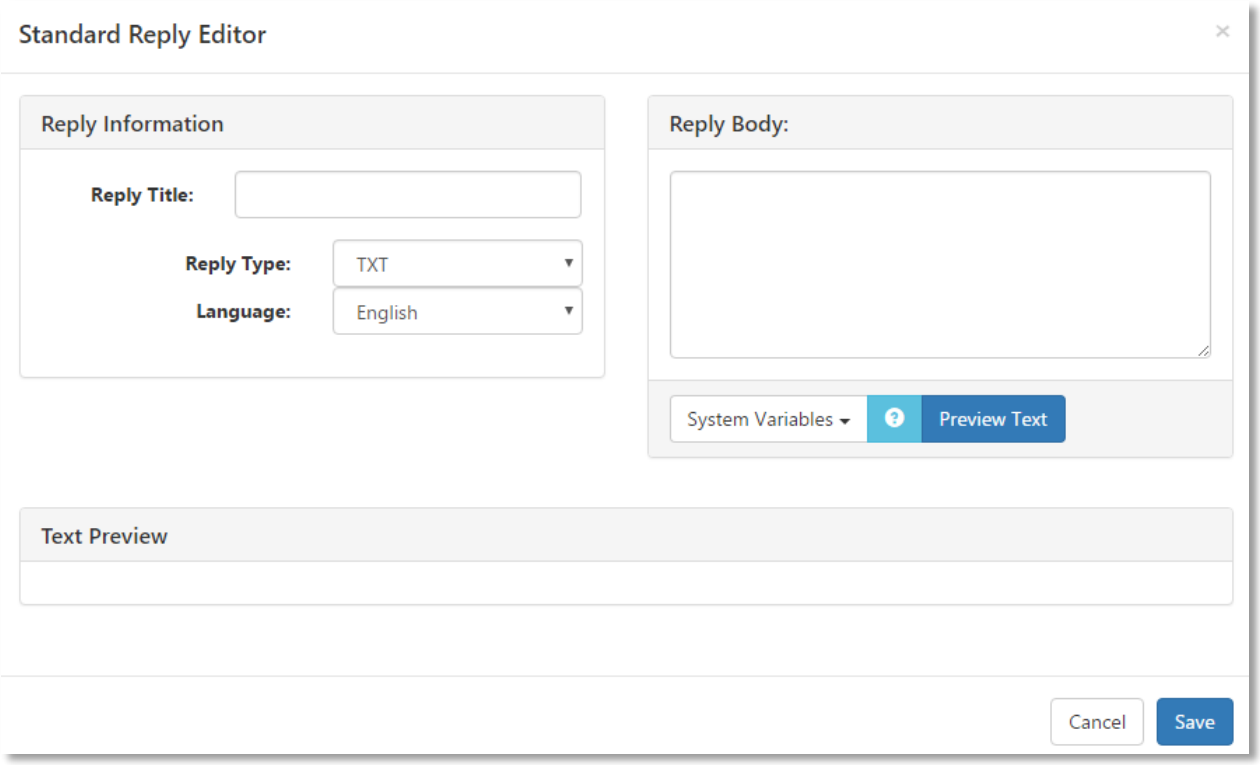

Figure 33: New Standard Reply

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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

Follow these steps to 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.

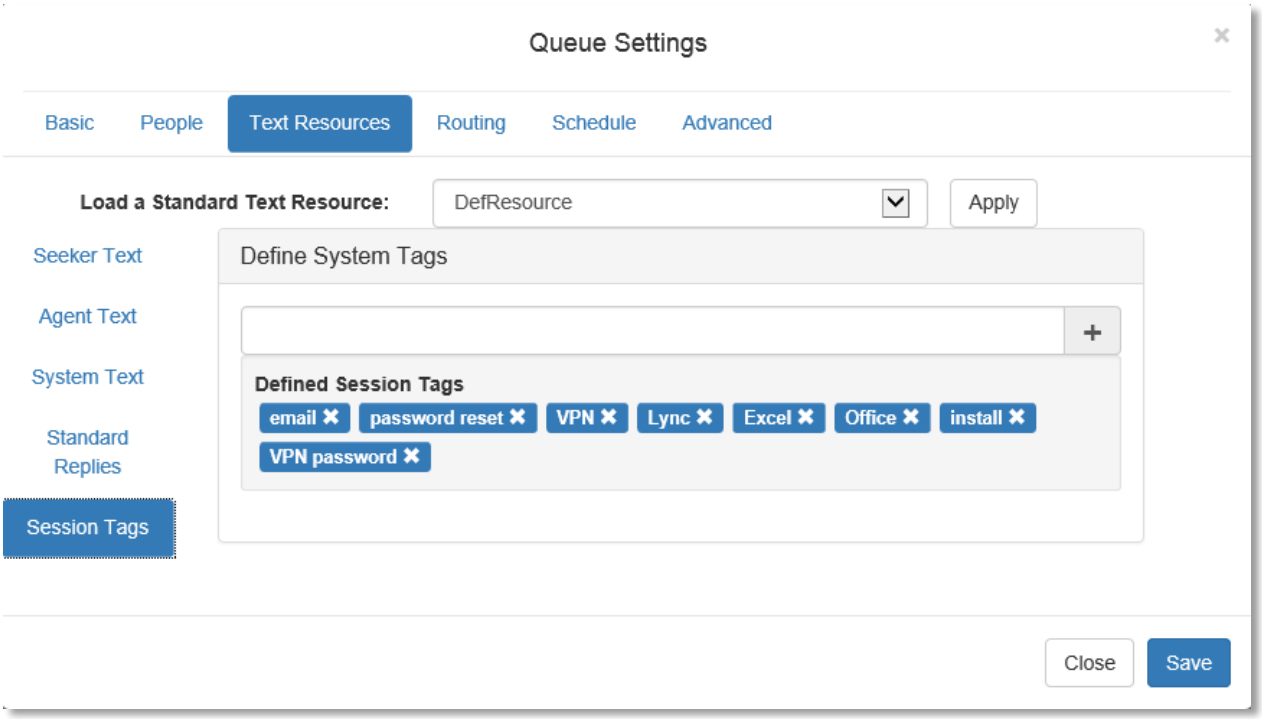

Figure 34: Session Tags

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ROUTING

Routing settings allow you to specify timeout values and rollover queues.

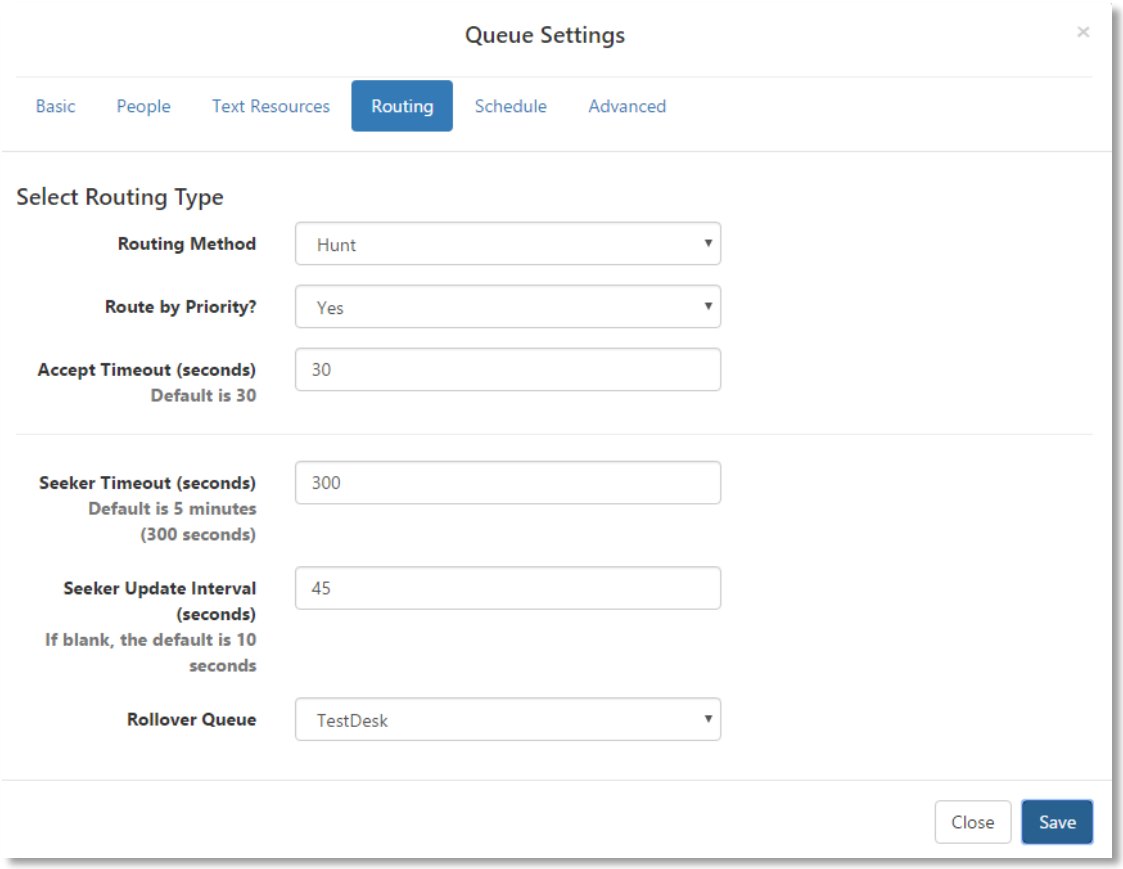

Figure 35: Queue Routing Settings

ROUTING METHOD

The routing method is how the queue dispatches chat requests across agents in the queue. There are three routing methods: **Hunt**, **Skill Best Match Hunt**, and **Longest Idle Hunt**.

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

1. Get a list of all agents assigned in the queue
2. Of the agents assigned to a queue, which agents have an **Available** Lync/Skype for Business status
3. Of the **Available** agents, which agents are not at their Max Concurrent chat limit
4. Of "**Not Max Concurrent"** agents, which agents are not at their Max Chats Per Day
5. Of the "**Not Max Chats Per Day**" agents, which agents are not in the excluded list. The excluded list is made up of agents that have declined this chat session already, been set to "No Chats", or disabled themselves from the queue.

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 route the chat to.

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Hunt

When using the **Hunt** routing method, Chime takes the agents and looks at the total number of chats they have taken. The agent that has accepted the least amount of 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 enable, all agents at Priority 1 are processed first, then Priority 2, Priority 3, and so on.

Skill Best-Match Hunt

When using **Skill Best-Match Hunt** routing method, Chime will take the Skill Tag that is assigned to the seeker request and will choose an agent who's assigned skill tag matches.

If multiple agents have the matching skill tag, Chime will look at the available agent's total number of chats 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 enable, Chime first searches through all the priority levels first in order to match an expert with the seeker's problem tag. If a match isn't found, Chime does a **Hunt** search with the **Route by Priority** enable**.**

Longest Idle Hunt

When using the **Longest Idle Hunt**, Chime creates a list of available agents based on the **Hunt** methodology. Chime then takes the available agents, finds the agent that has not accepted a chat for the longest time, and routes the chat to that agent.

If that agent doesn't accept the chat, the agent with the next longest chime is then chosen and routed to.

If **Route by Priority** is enable, agents that are set to Priority 0 are processed first, even if the other priority levels have agents with a longer last accepted time. If no agents are available or do not accept at that priority level, Chime moves to the next priority level.

ROUTE BY PRIORITY

Selecting 'Yes' for Route by Priority will change the queue to route based on which priority agents have. If the queue is set to route by priority, then agents with a priority of 1 will get chats before those who are priority 2 and 3. Selecting 'No' for this option will change the queue to ignore the agent priority setting.

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ACCEPT TIMEOUT

The amount of time an agent has to accept an incoming chat. If an agent does not accept a chat within this time frame, the chat will be routed to the next available agent.

SEEKER TIMEOUT

The amount of time a seeker will wait in the queue will wait before being informed that a connection could not be made, or sent to a rollover queue.

SEEKER UPDATE INTERVAL

The frequency at which users will receive the message informing them that the queue is attempting to connect them with an agent.

ROLLOVER QUEUE

This setting allows you to specify a queue for seekers to ‘roll over’ to. The seeker will roll over to this queue if the queue that was first contacted was unavailable.

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SCHEDULE

Administrators and managers can set a specific schedule for each queue that will determine when the queue will be online and offline. There are two different modes that you can choose from when determining a schedule, Based on Availability and Based on Schedule. Additionally, there is an Always Available toggle that will make the queue online all the time, even if there are no agents available in the queue.

Based on Availability – This is the default schedule type. A queue using this schedule type will be online as long as there are agents available in the queue. It will go offline if all agents are offline or busy.

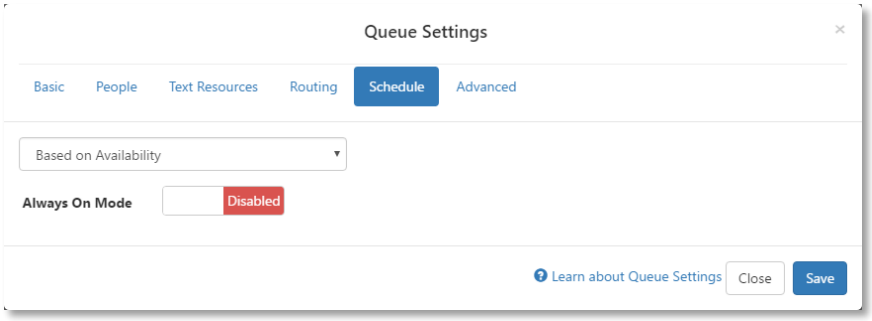

Figure 36: Queue Availability

Based on Schedule - A queue using this schedule type will be online only during the times set on the schedule. Note: there need to be agents available in the queue for it to stay online. If there are no agents available in the queue while using the schedule, it wil go offline.

Follow these steps to set a schedule for a queue:

1. Go to Queue **Settings > Routing** to enable a queue schedule. Select the '**Based on Schedule**' option from the drop-down menu.

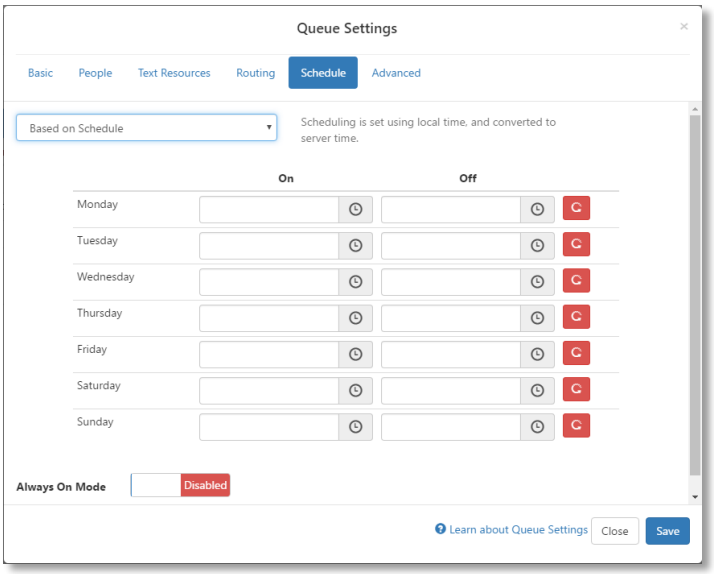

Figure 37: Queue Schedule

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2. Click on the **clock icon** to pick a specific time for the queue to turn on. To set a schedule for the queue, you must **select an On and Off time** for each day. To turn the queue off for a specific day, leave the On and Off fields blank.

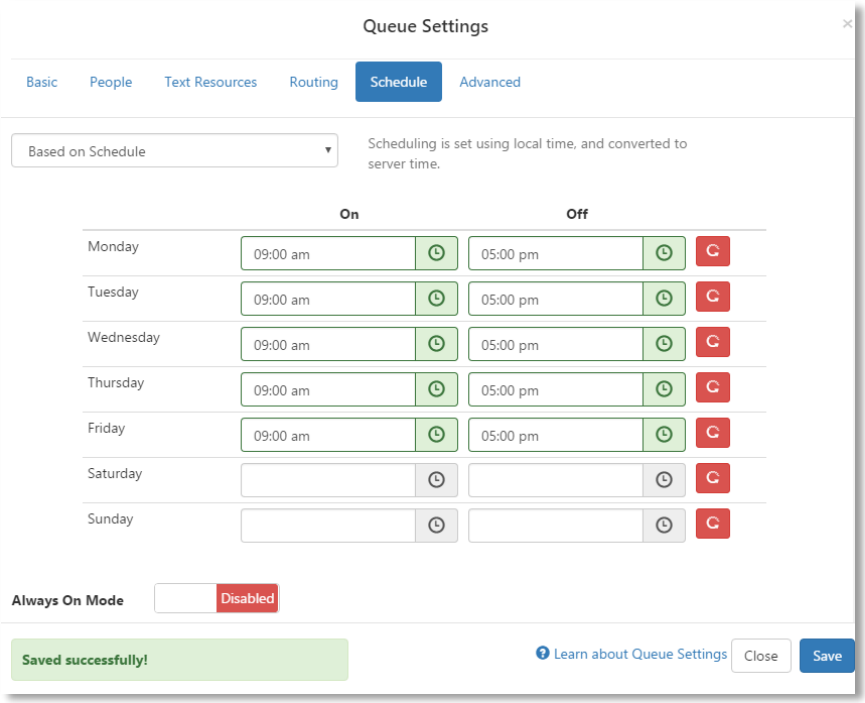

Figure 38: Queue Schedule

3. Click on the **blue arrows** to change the hour and minute fields. You can also click on the hour or minute numbers to bring up a menu of pre-defined numbers.

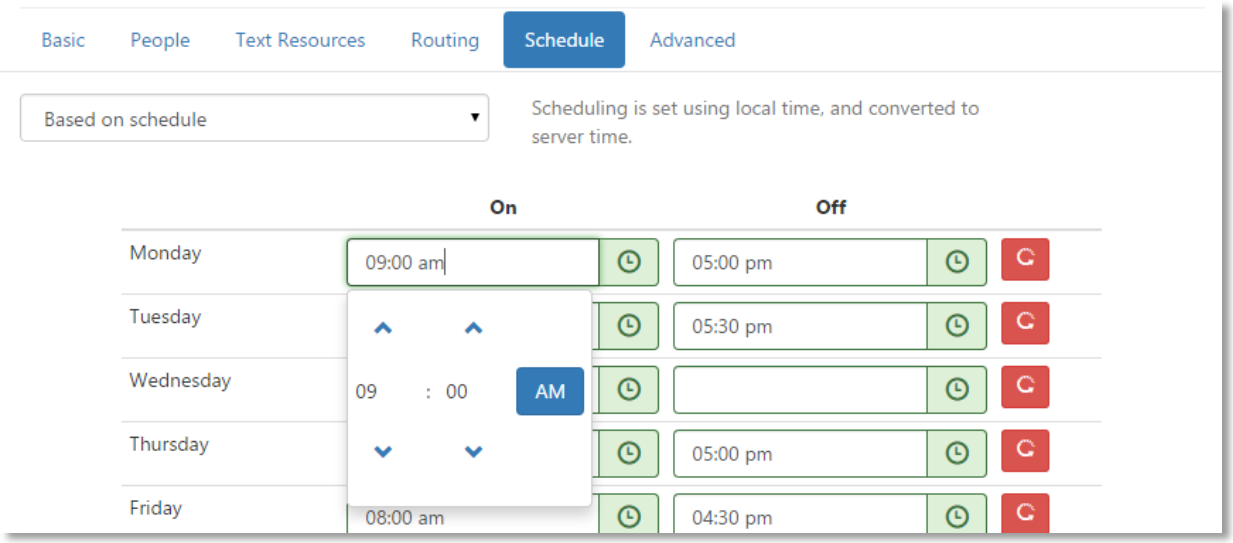

Figure 39: Queue Schedule – Choose time

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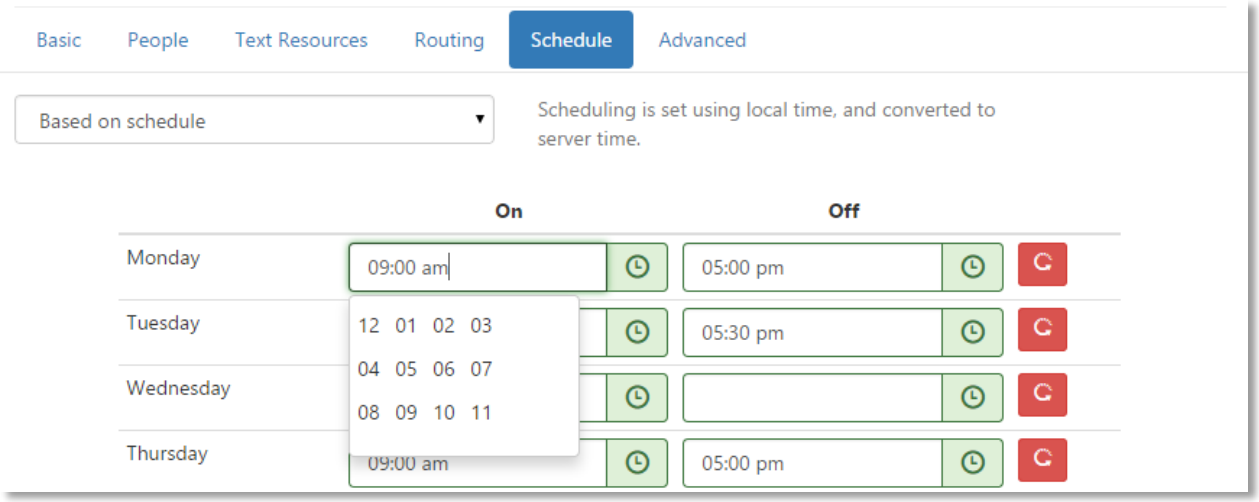

Figure 40: Queue Schedule – Choose time

4. Click on the **AM/PM button** to switch from one to the other.

If you want your queue to always be on, regardless if there are agents available or not, toggle the **Always On Mode** switch to "Enabled" and save.

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ADVANCED

The advanced settings section allows you to configure things such as queue target values and the Agent Context Window. Setting target values will allow these goals to be tracked within queue charts.

Queue Target Values are optional settings that allow managers or administrators to set goals for things such as Average Speed to Answer and Concurrent Chats.

- **Target ASA:** Entering a number in this field will set a target value for Average Speed to Answer metrics.
- **Target Chat Concurrency:** This will set a target value for chat concurrency or number of chats being handled at once.
- **Target Chat Duration:** This sets a target value for chat duration.
- **CC/Web Chat Offline Email:** This email address will receive chat transcripts, and also information gathered from the seeker when the webclient/queue is offline.

Enable Agent Context Window is an option for agents that allows a window to open within a chat that will show a web page. By entering a link in the URL section, you can configure what pops up within the window by entering an address for a specific website. **Note: Before the agent context window can work in Lync, you'll need to install a Lync registry key that can be found here:** www.addchime.com/downloads/agentCWE.zip

DELETING A QUEUE

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

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QUEUE DASHBOARD

Click the icon in the queue grid to navigate to a Queue Dashboard page.

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. You will also find queue charts that have all chats recorded and are separated into different categories. These charts will be date selectable. On the top right, under Desk Agents, there is a blue refresh button. This manually refreshes the Lync statuses of the agents assigened to that queue.

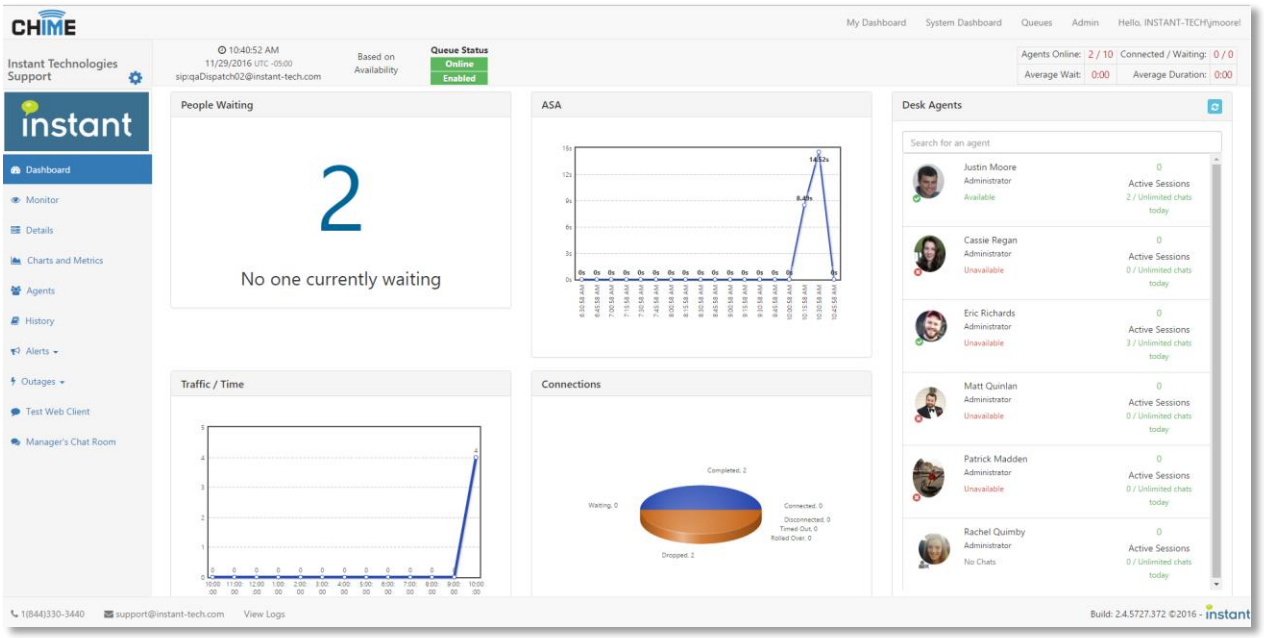

Figure 41: Queue Schedule – Choose time

MONITOR

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

DETAILS

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 Seeker. There is a date filter to access chats from that queue across a certain time frame.

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CHARTS AND METRICS

The Charts and Metrics page shows statistics and graphs for a specific queue, which is customizable by length of time. 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 Seeker questions and how the queue is used.

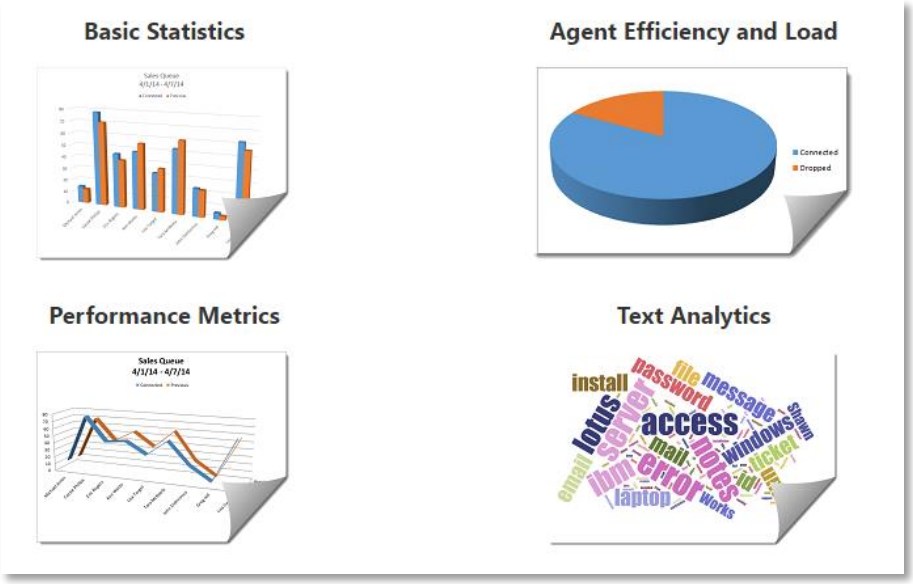

Figure 42: Charts and Metrics Options

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.

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 seeker email, session ID, and start and stop date.

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ALERTS

QUEUE DASHBOARD

Click the icon in the queue grid to navigate to a Queue Dashboard page. The Queue Dashboard is where you will go to create, manage and monitor alerts.

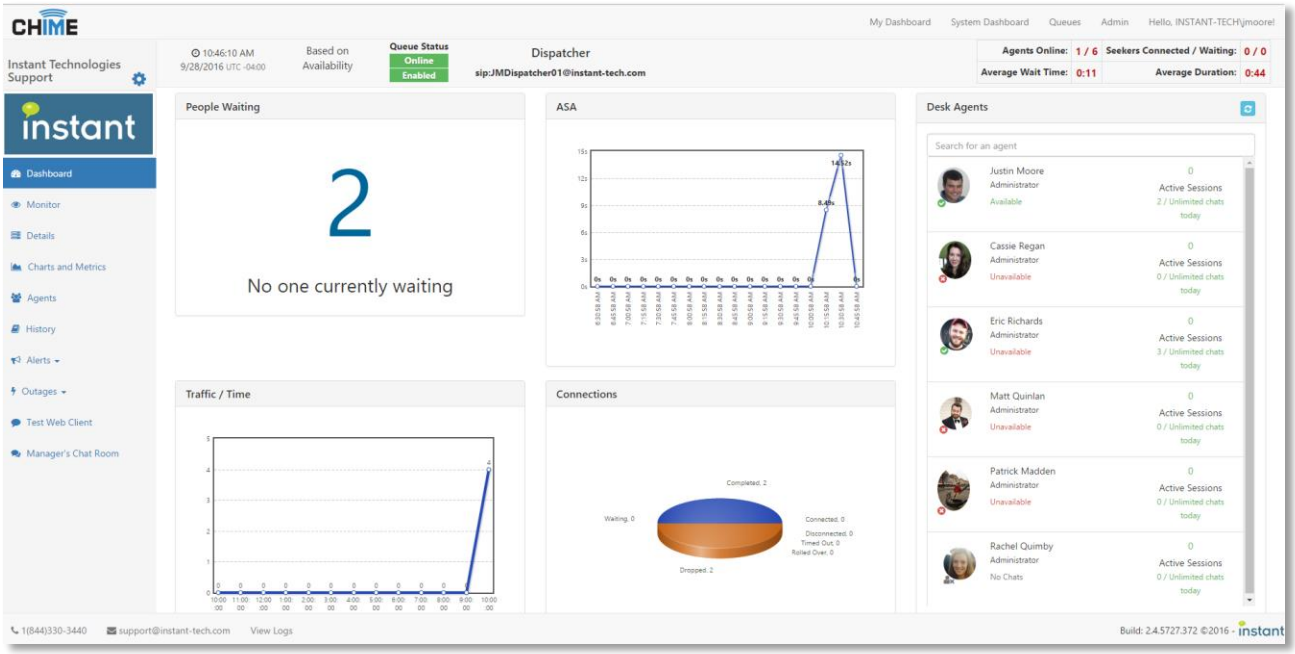

Figure 43: Queue Schedule – Choose time

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ALERT TYPES

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 thouroughly 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.

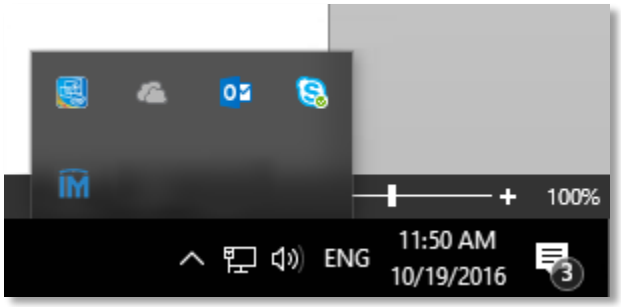

Figure 44: Alerting App – System Tray

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.

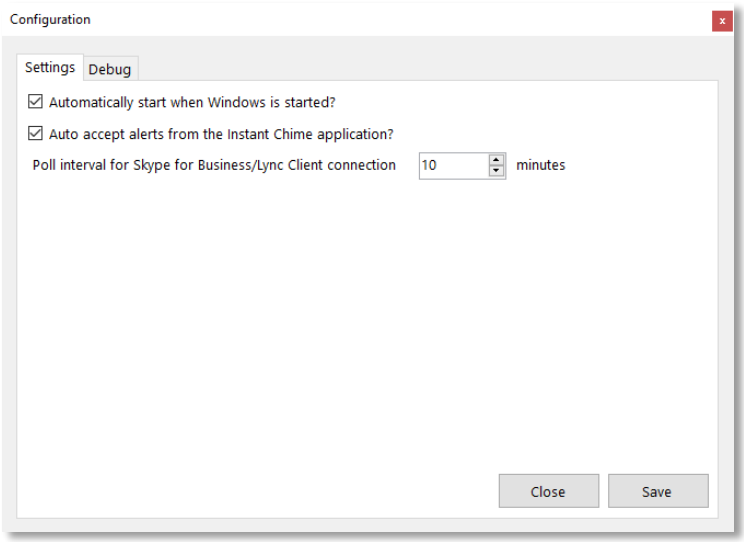

Figure 45: Alerting App -- Settings

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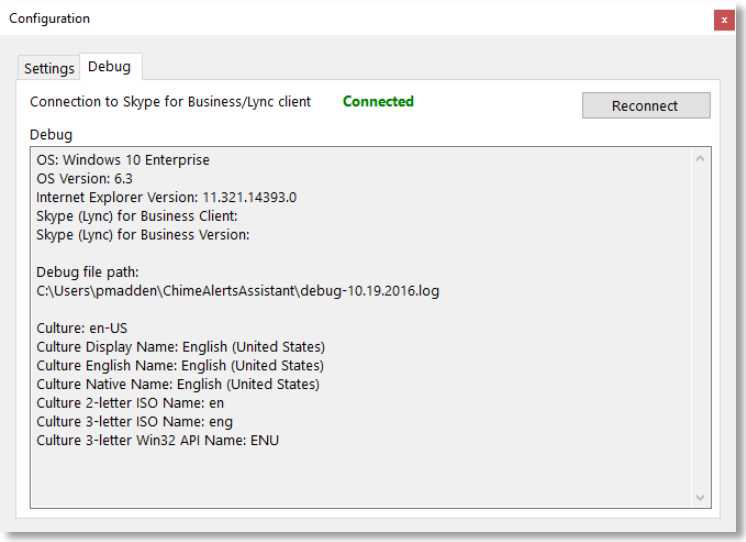

Figure 46: Alerting App -- Debug

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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.

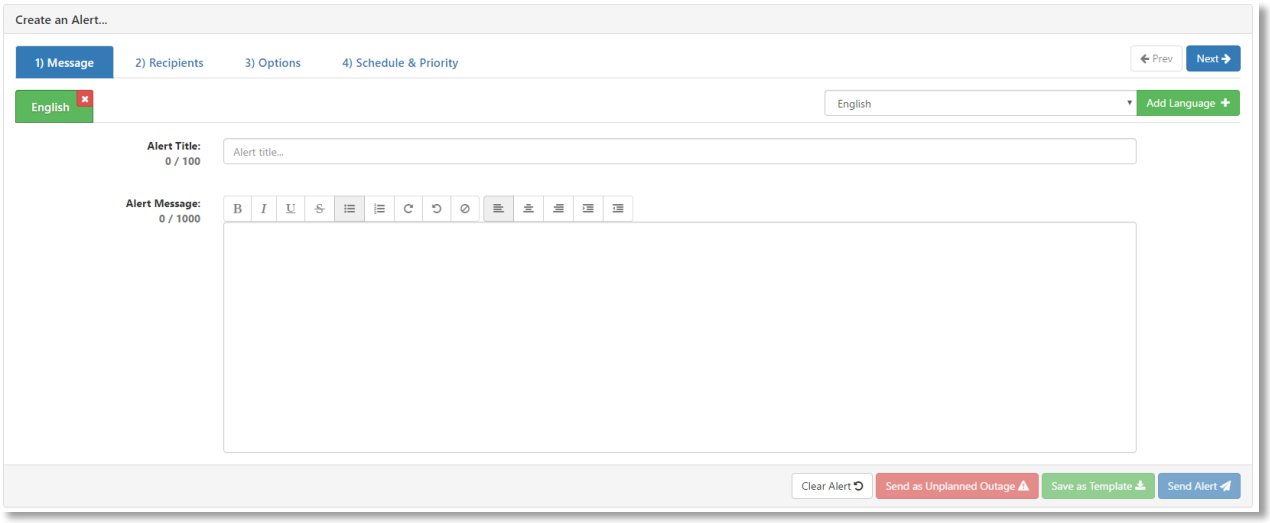

Figure 47: Alert Message

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.

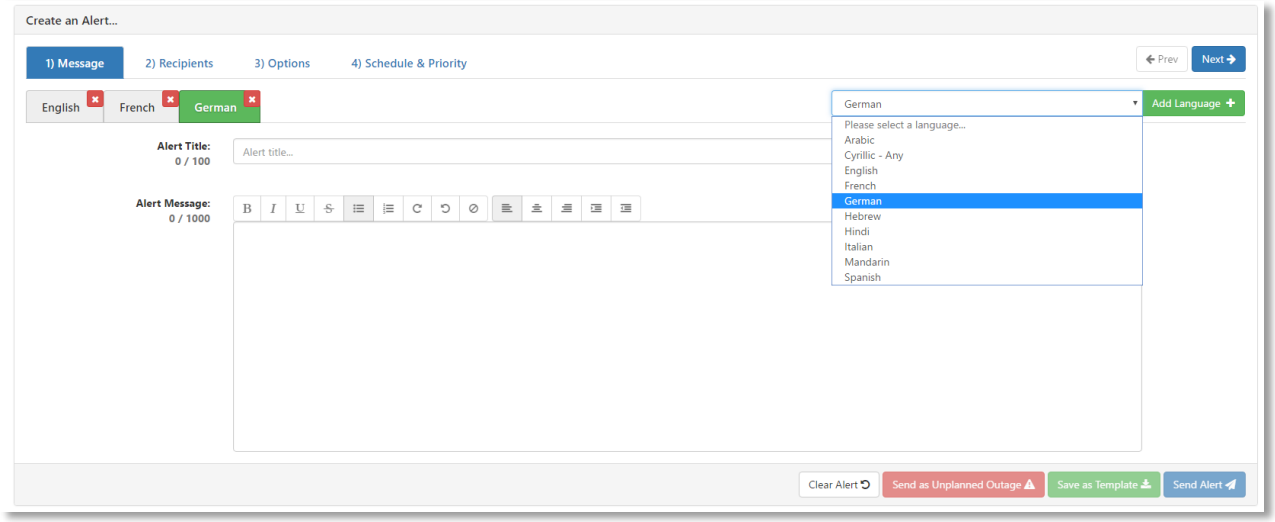

Figure 48: Adding Additional Languages

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.

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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.

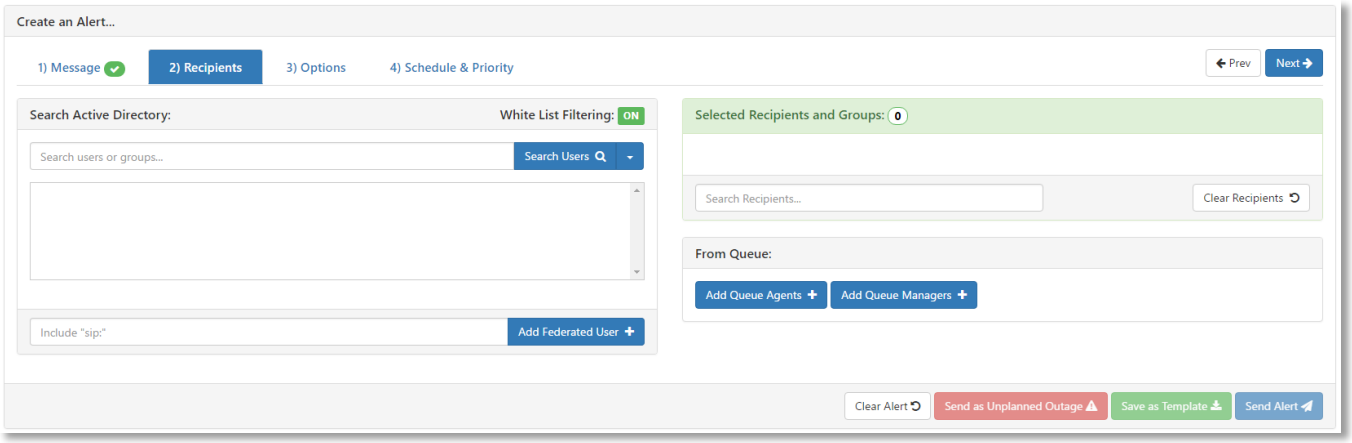

Figure 49: Alert Recipients

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.

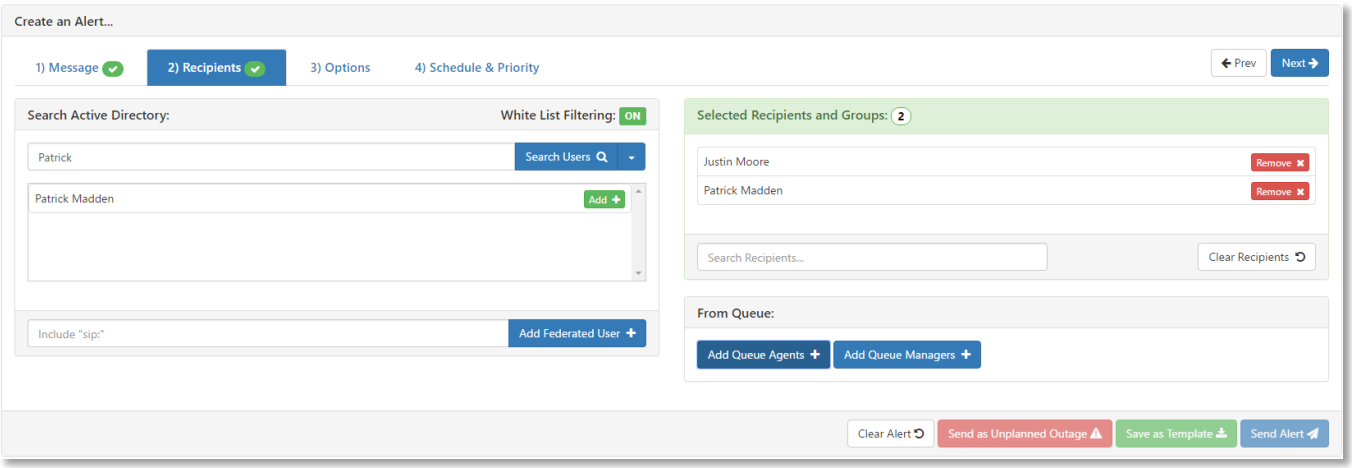

Figure 50: Added Recipients

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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.

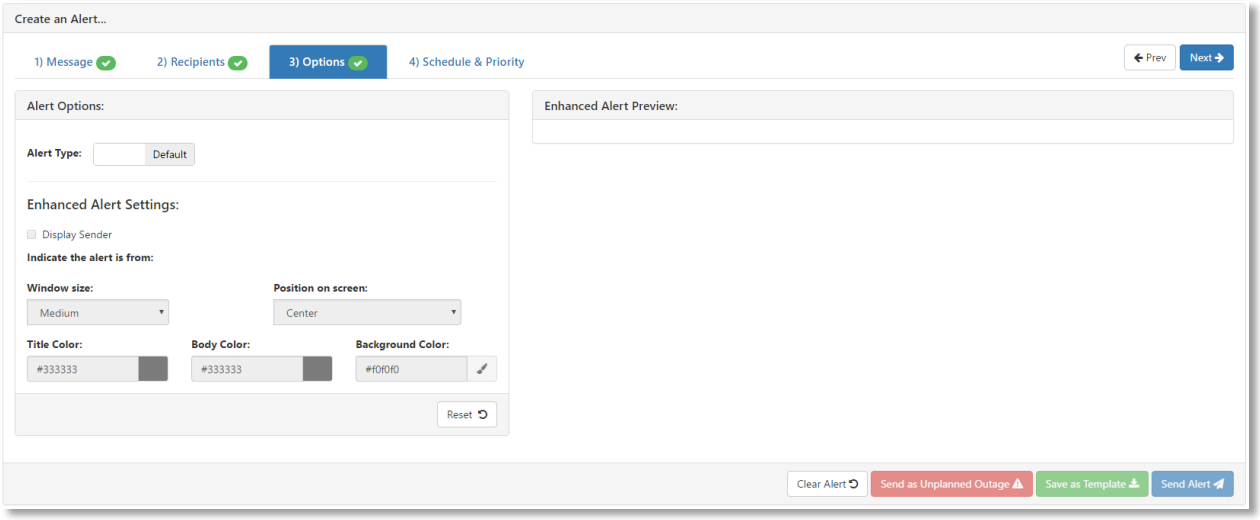

Figure 51: Alert Options

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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.

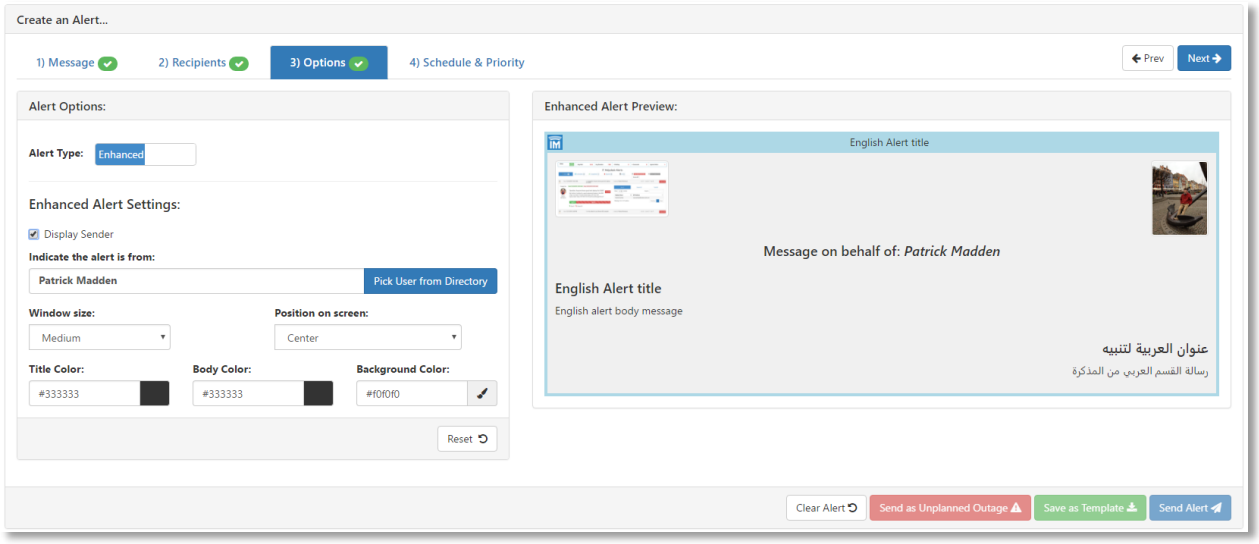

Figure 52: Enhanced Alert Features

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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.

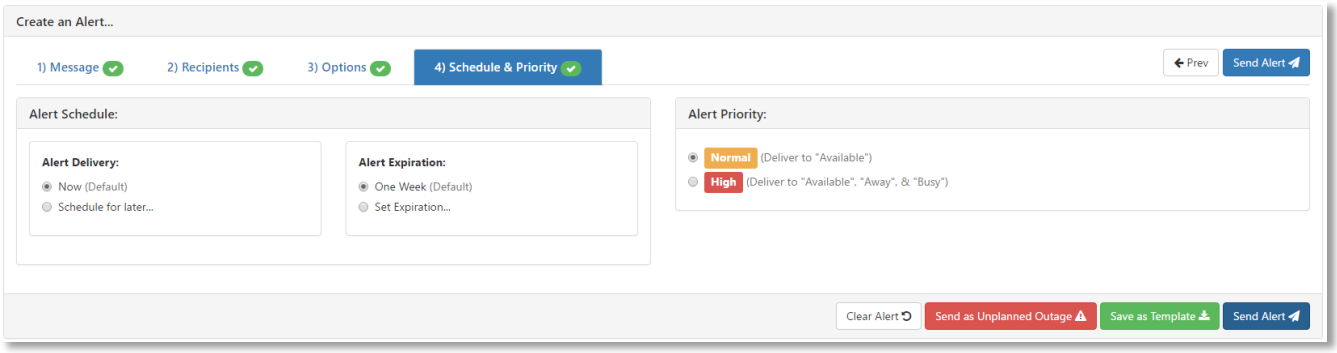

Figure 53: Alerts Schedule & Priority

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.

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.

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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.

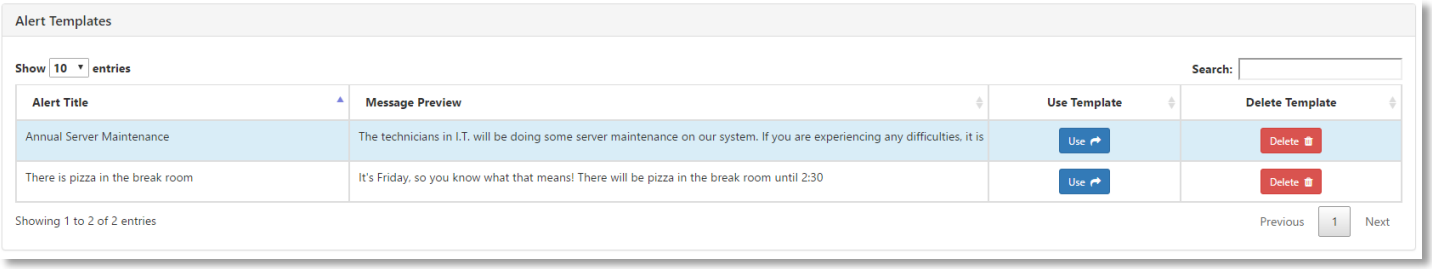

Figure 54: Alert Templates

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.

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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.

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

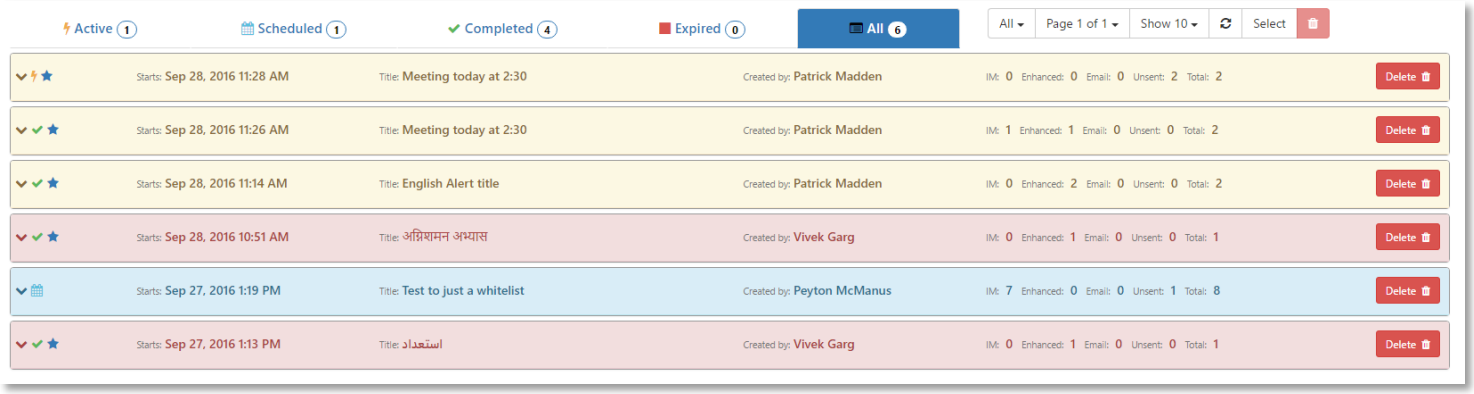

Figure 55: Alert History

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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.

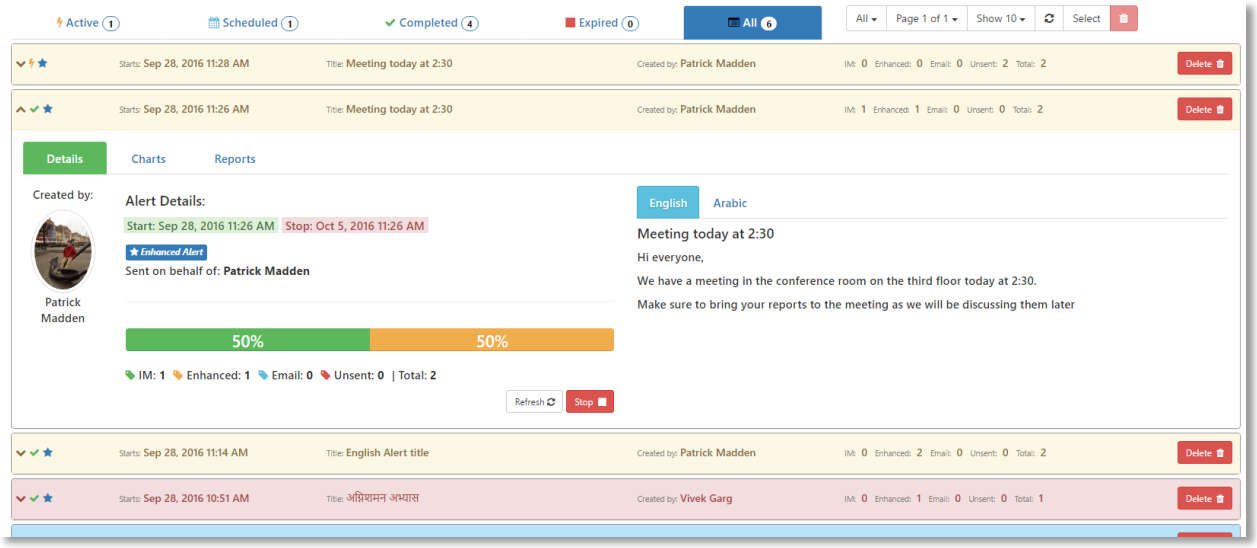

Figure 56: Alert Details

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.

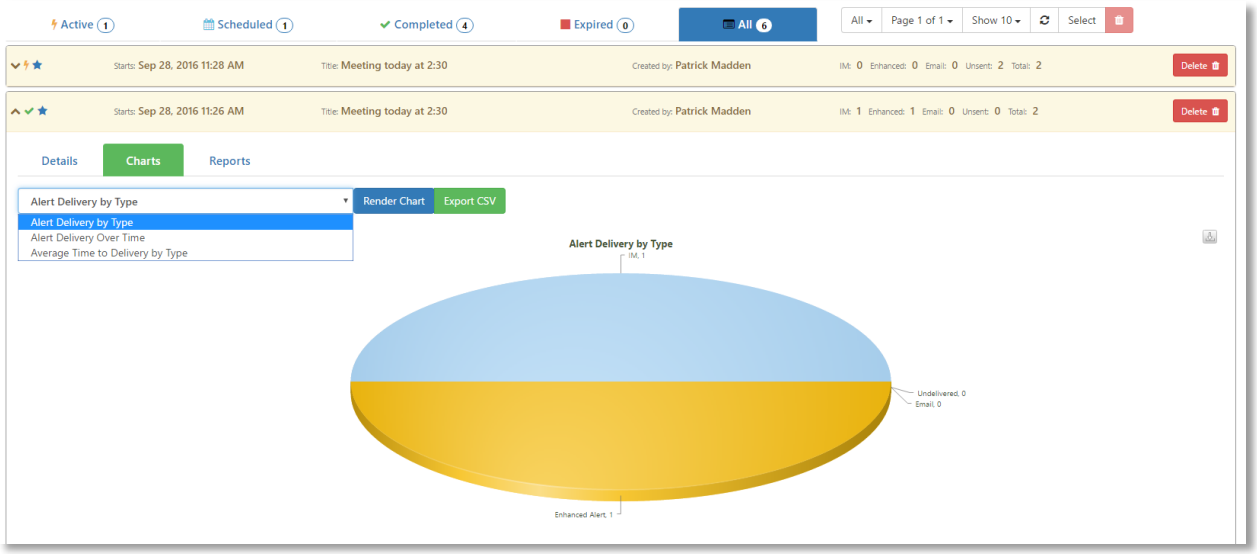

Figure 57: Alert Charts

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The Reports tab shows the recipients of the alert and how they have received the alert. The five sections in reports are IM, Enhanced, Email, Unsent and Total. 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.

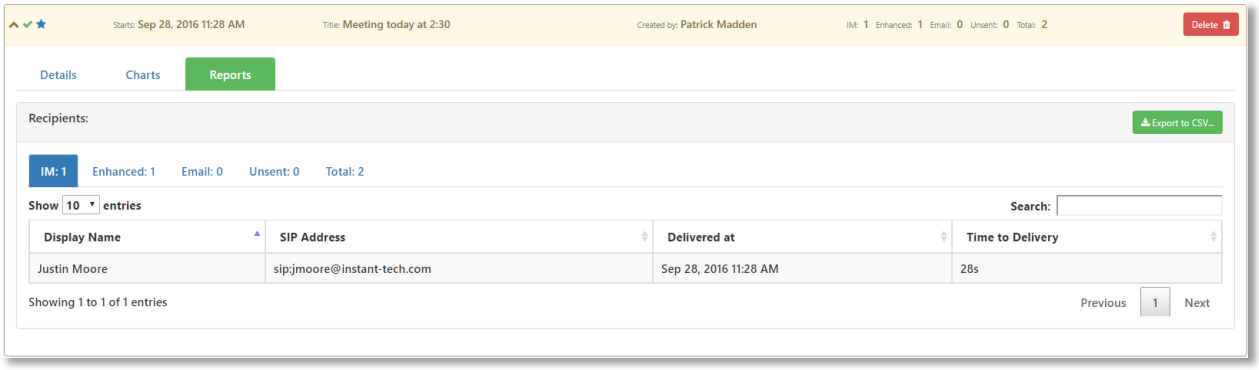

Figure 58: Alert Reports

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.

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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 form 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.

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OUTAGES

The Outages page is where you can go to notify the seekers 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.

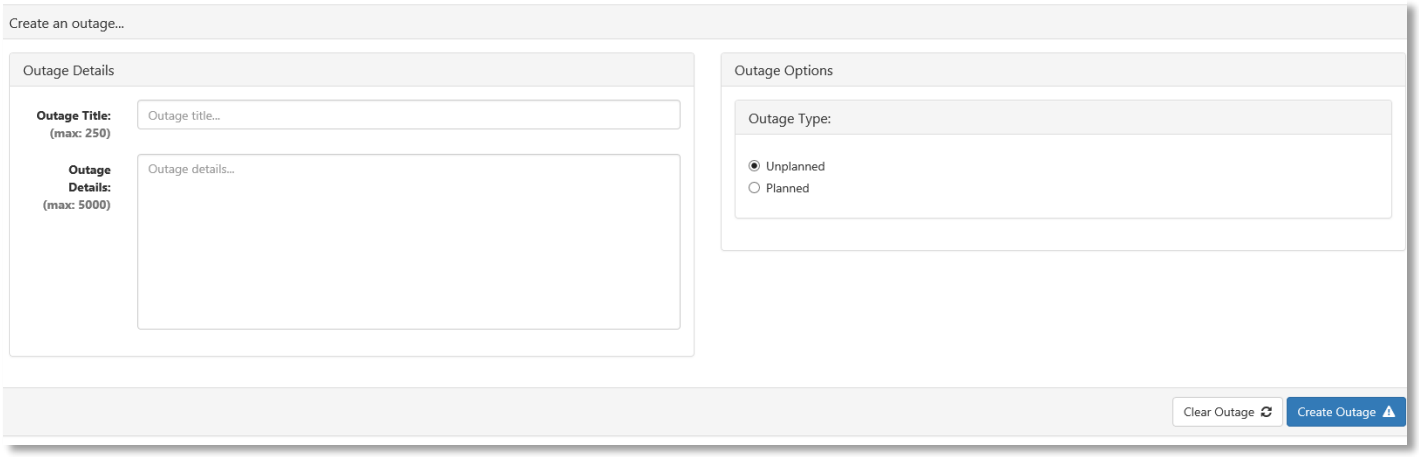

Figure 59: Outage Title & Details

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.

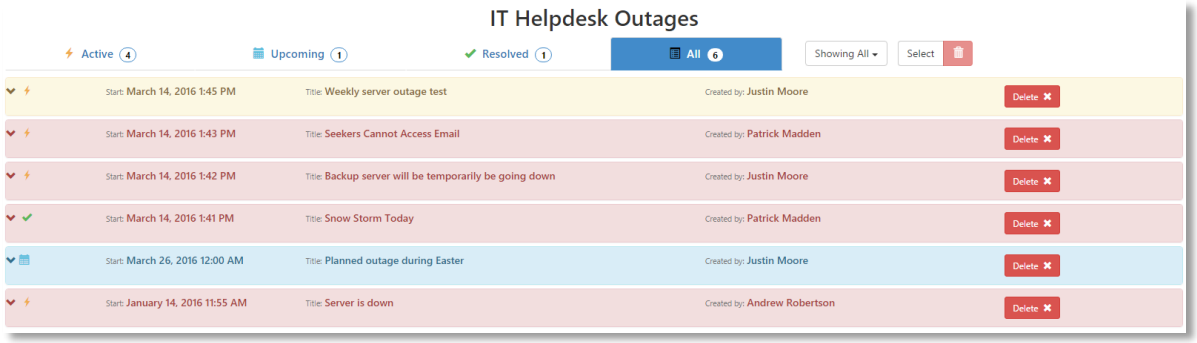

Figure 60: Outage History

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

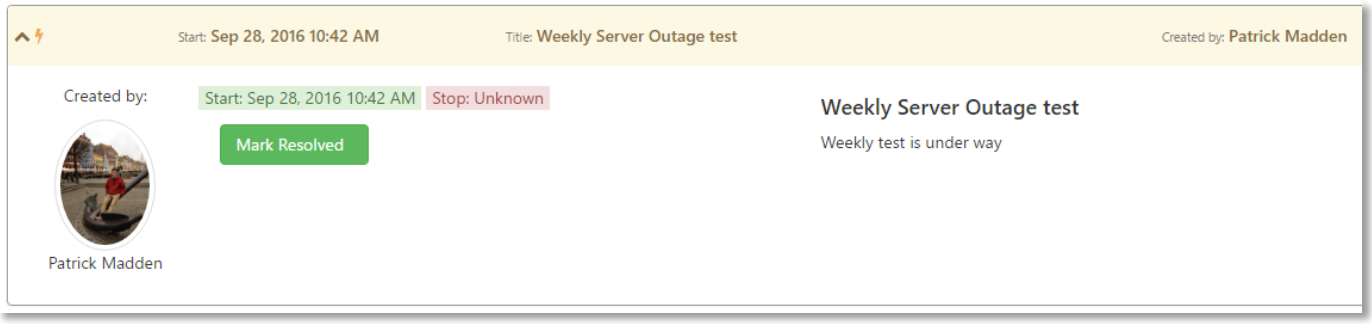

Figure 61: Expanded Outage

MANAGER'S CHAT ROOM

The Manager's Chat Room is a chat room for agents and managers that have been added for back channel communication amongst each other. To send out a request to chat with the agents and managers, click Huddle Up! and type in a title. The agent chat room can also be reached from My Dashboard, by clicking on the chat room icon next to the queue name.

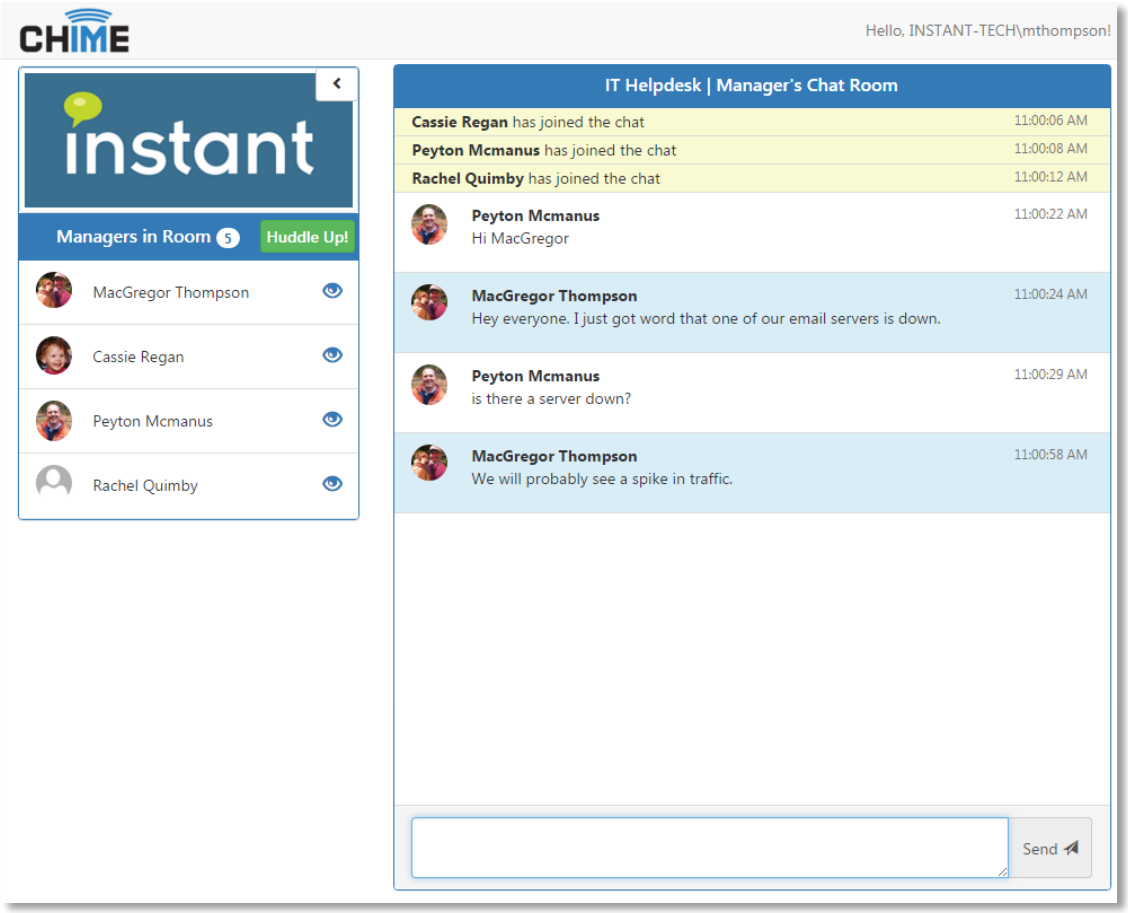

Figure 62: Managers Chat Room

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CHAT ROUTING

Once a queue has been created and agents have been provisioned, seekers 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, seekers 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.

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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:

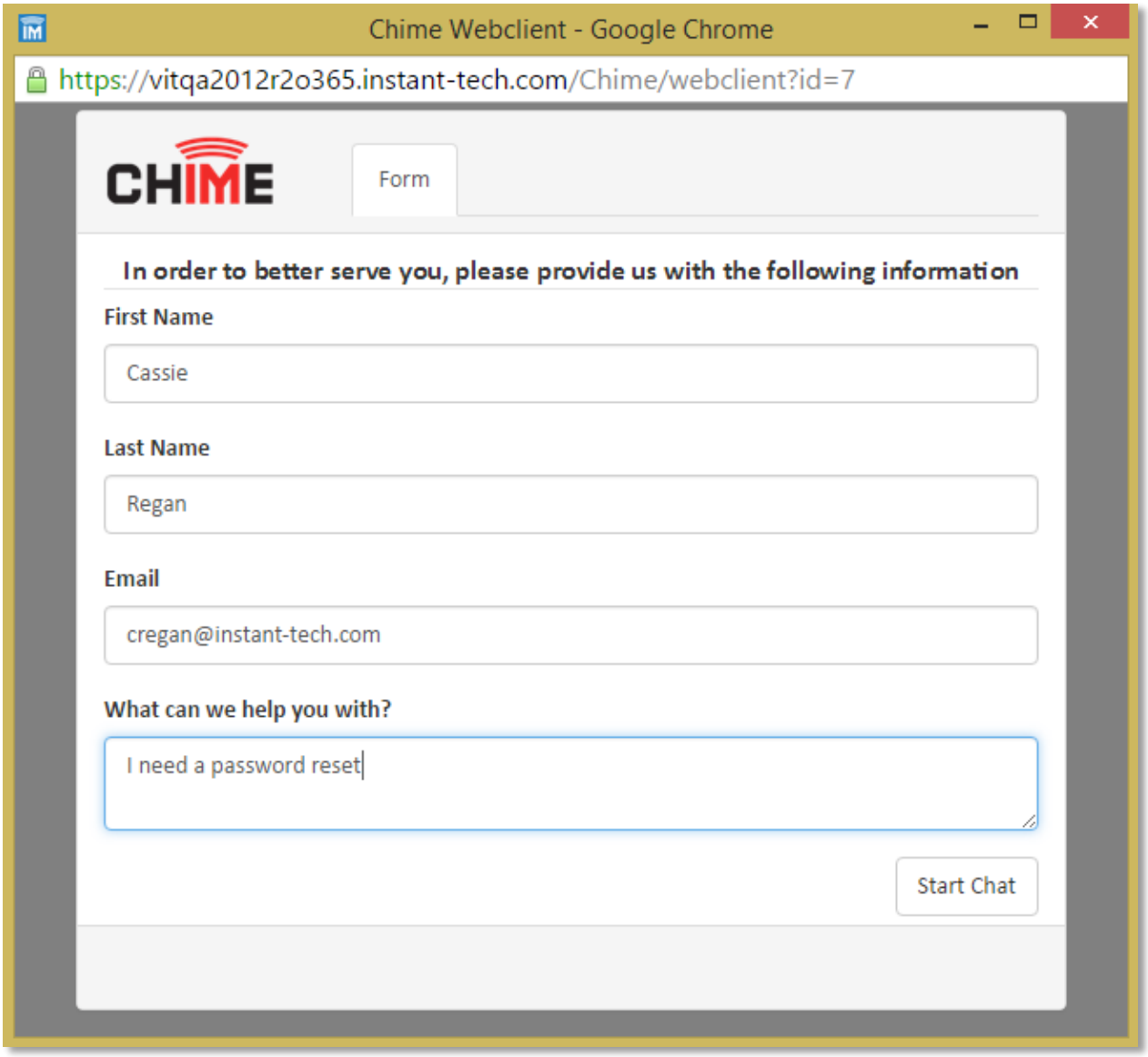

Figure 63: Chime Web Client

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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 seeker 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 person with the seeker by creating a multiparty conference. The dispatcher will sit in the conference to monitor and handle the conversation, and the seeker and agent will chat directly. Users will also have all the capabilities of the Lync client available to them during the conversation.

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.

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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 seeker and the chat session.

Here is an example of the agent context window:

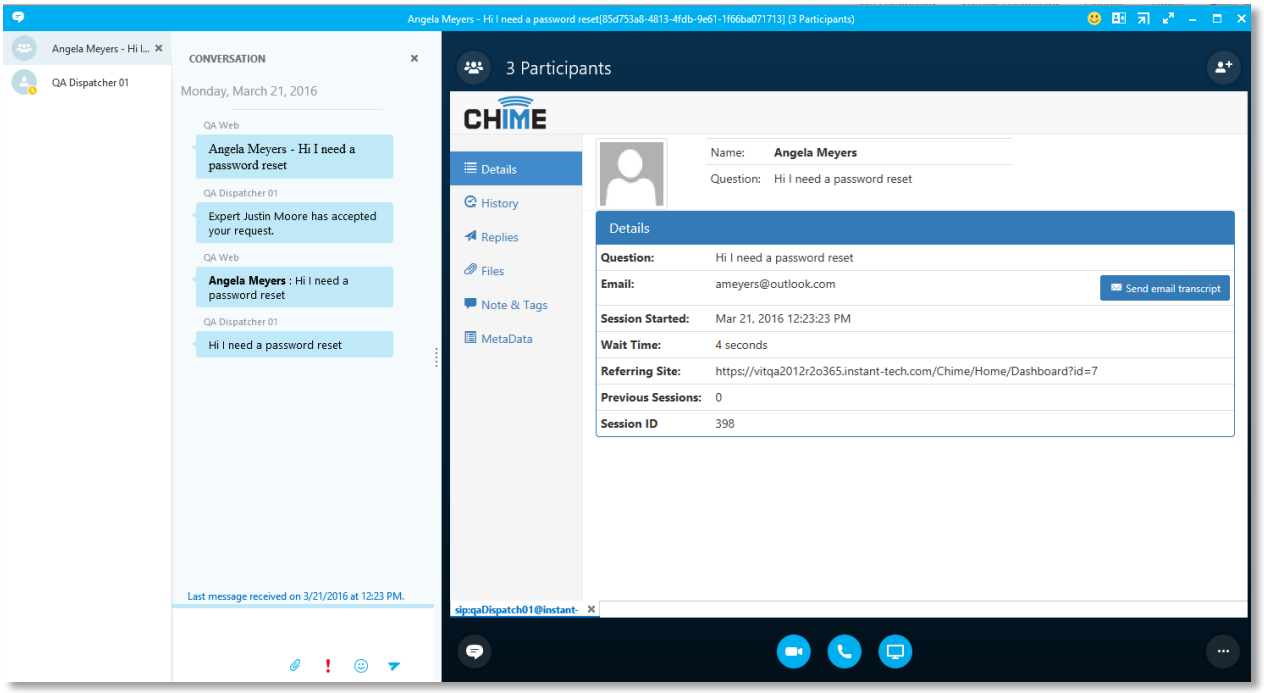

Figure 64: Agent Context Window

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RESOLVED/UNRESOLVED

Agents have the ability to mark a chat session as resolved or unresolved using the agent context window. To mark a session as resolved, go to the 'Comments & Tags' tab in the context window. This is the tab on the bottom. Click on the Unresolved button to change it to Resolved. The session will now be marked as resolved.

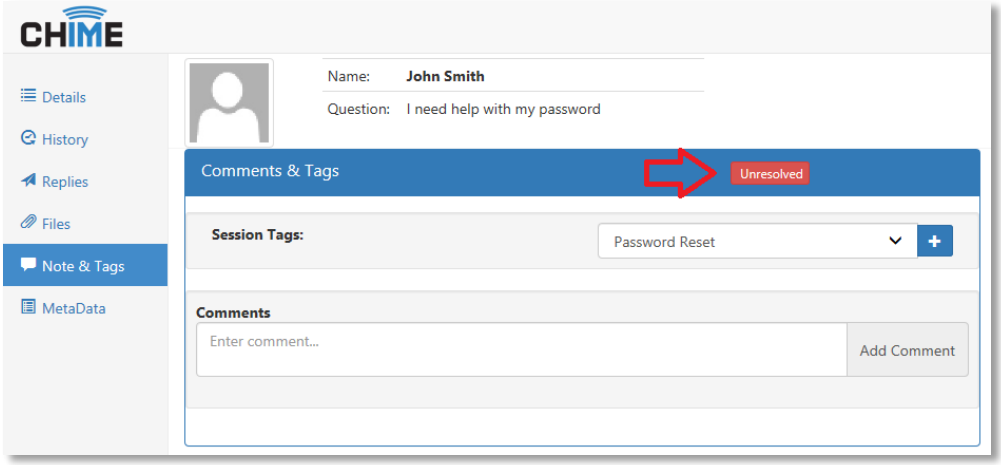

Figure 65: Unresolved Chat Session

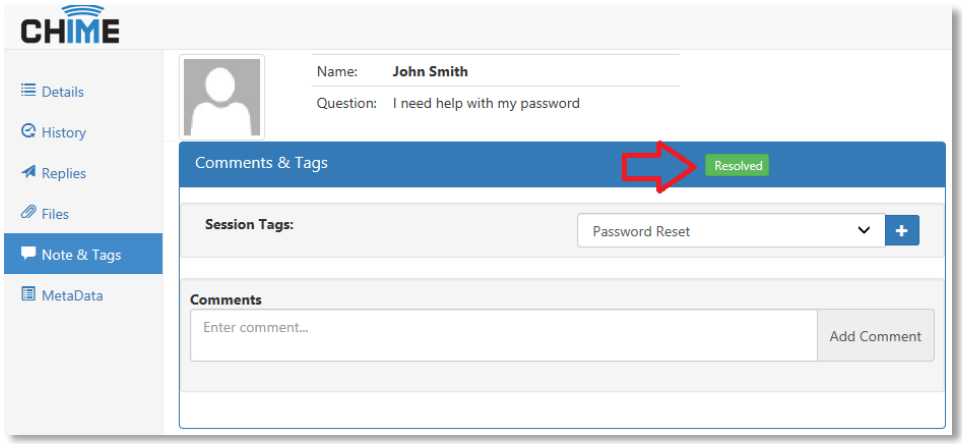

Figure 66: Resolved Chat Session

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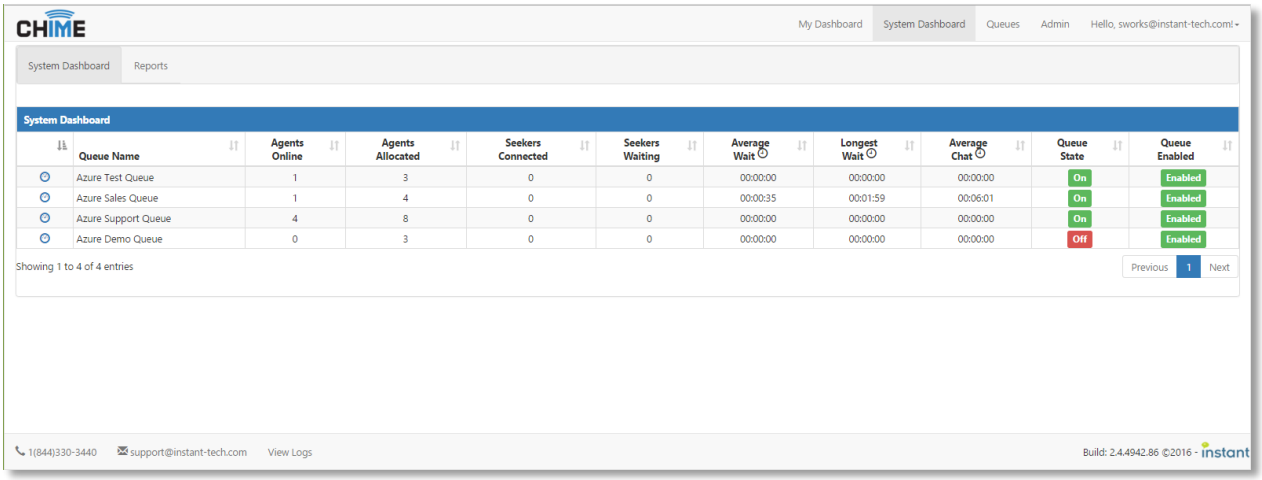
SYSTEM DASHBOARD

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 seeker, 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.



Queue Name	Agents Online	Agents Allocated	Seekers Connected	Seekers Waiting	Average Wait	Longest Wait	Average Chat	Queue State	Queue Enabled
Azure Test Queue	1	3	0	0	00:00:00	00:00:00	00:00:00	On	Enabled
Azure Sales Queue	1	4	0	0	00:00:35	00:01:59	00:06:01	On	Enabled
Azure Support Queue	4	8	0	0	00:00:00	00:00:00	00:00:00	On	Enabled
Azure Demo Queue	0	3	0	0	00:00:00	00:00:00	00:00:00	Off	Enabled

Figure 67: System Dashboard

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MY DASHBOARD

The My Dashboard page is where an agent can view all of their records as an agent, such as what queues they belong to, personal chat statistics, and chat transcripts.

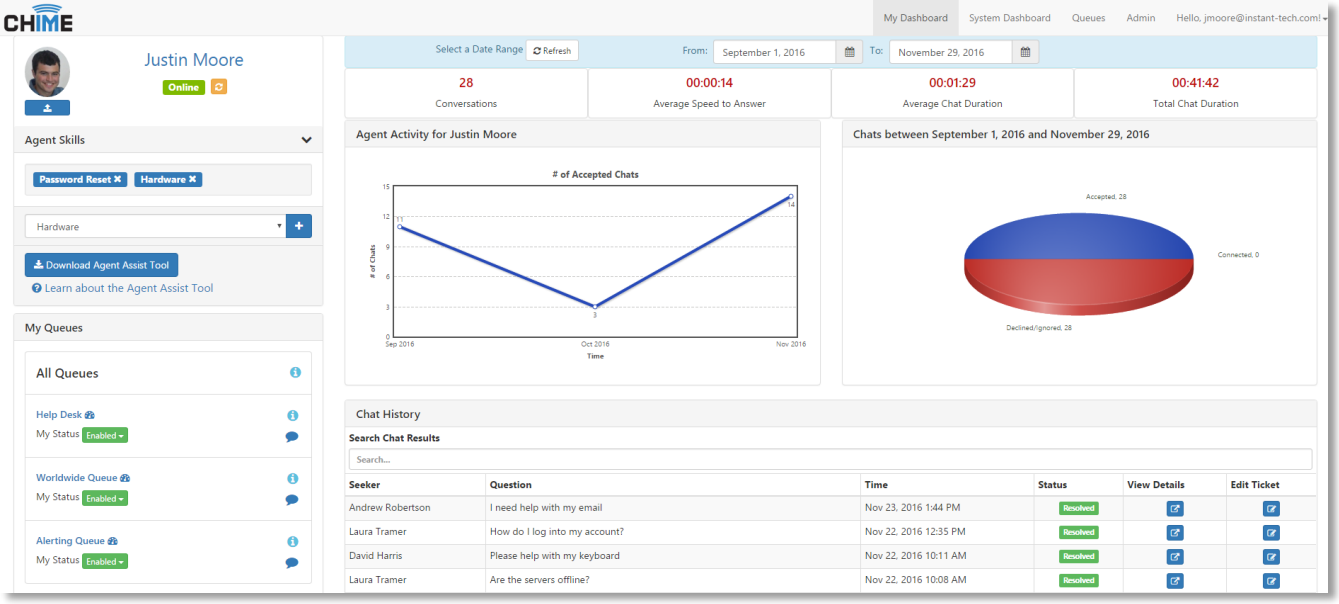

Figure 68: My Dashboard

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