instant

CHIME

REVIEWER GUIDE

Summer 2017

Contact Information

See our website for Customer Support information.

http://www.instant-tech.com/

CONTENTS

INTRODUCTION

This document is designed to help those who are configured as Managers in Chime in the process of learning how to use Chime. We will provide information on how to fully configure Queues, manage Agents in the Queue, view reporting information included in Chime, and how to set up a queue with routing tags and Suggestions.

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

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

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 OnPremise, 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:

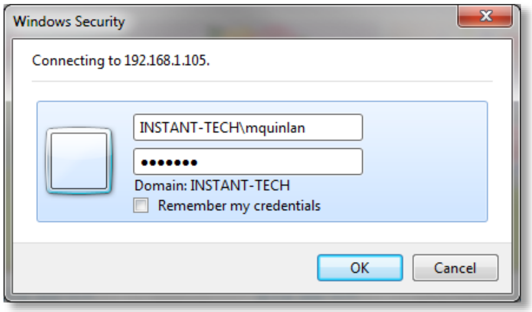

Figure 1: Windows Authenticated Login

MY MANAGER HOME

My Manager Home page is where you can monitor, and view reports for queues within Chime. When you open one of the My Manager pages, Chime displays tools and information for the queues you have been allocated to.

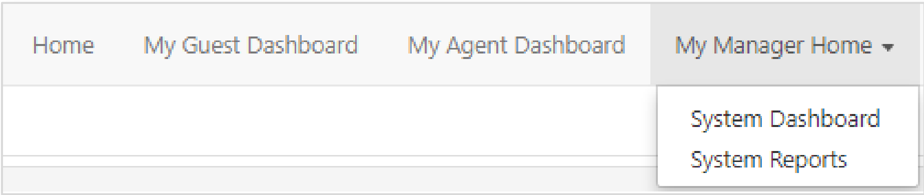

Figure 2: System Dashboard

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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 Reviewer for. The System Reports section allows a Reviewer to have a comprehensive look at all of the data for the Queues.

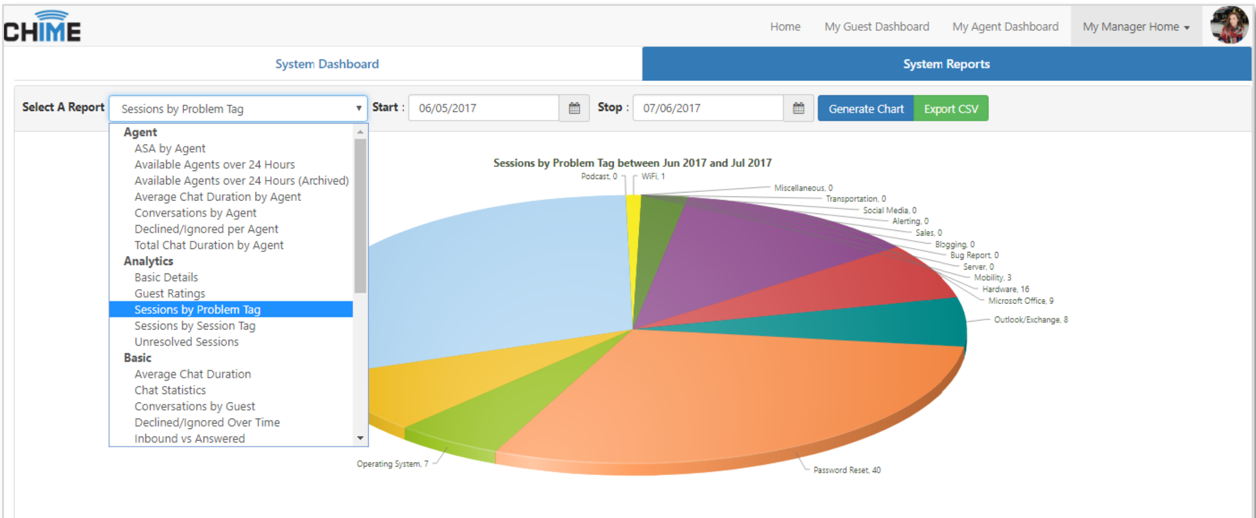

Figure 3: System Reports

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.

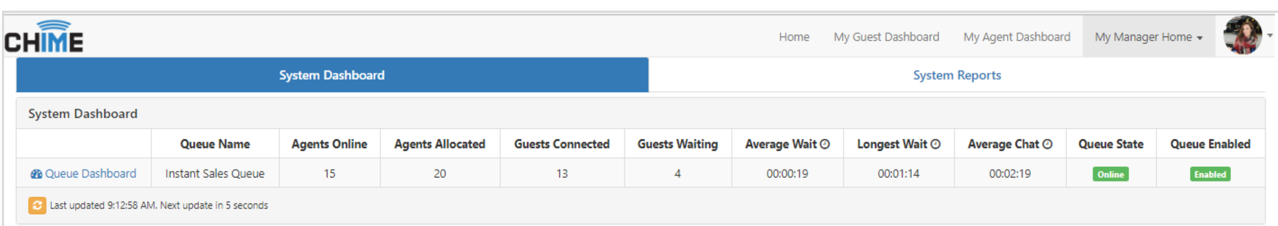

Figure 4: System Dashboard

QUEUE DASHBOARD

When using the System Dashboard, you can click the **Queue Dashboard** link on the left side of the table to be brought to the Queue's Dashboard. The Queue Dashboard is where you can monitor Agents that are online, view reports on various queue statistics, create alerts, and set up outage notifications.

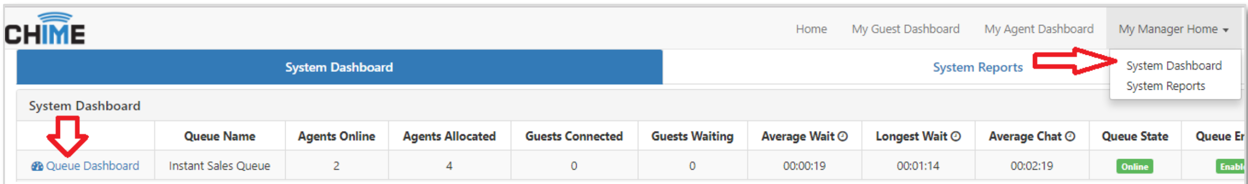

Figure 5: Queue Dashboard

ACTIVE AGENT CHATS

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

MONITOR SECTION

The Monitor page shows all Guests who are currently waiting, and all Guests who are connected to a chat with an Agent. There is also a date filter that allows you to choose a day in the past to check for stuck chats from previous days.

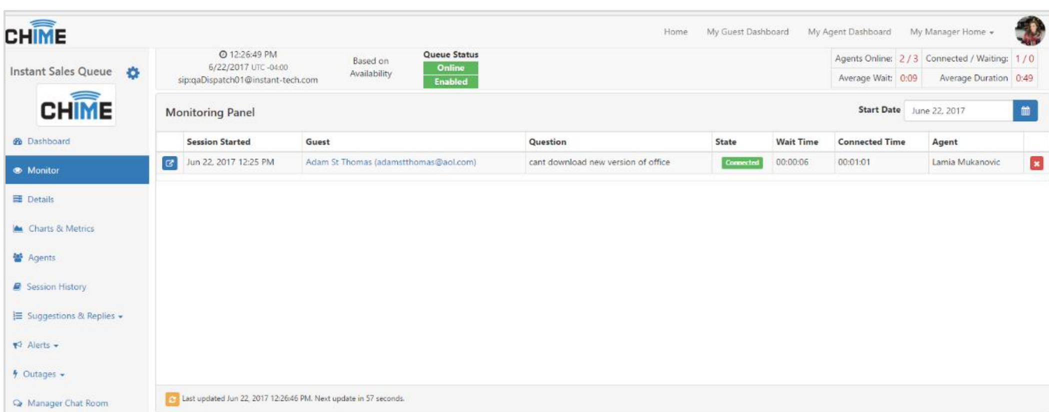

Figure 6: Connected Chat on Monitor

DETAILS SECTION

The Details page shows all chat sessions that have been created in that Queue. You can filter the chats by All, Connected, Waiting, Dropped, Disconnected, Completed, Timed Out, Rolled Over, and Queue Unavailable. Next to the filter is a date picker which can be used to review chats from previous days. 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.

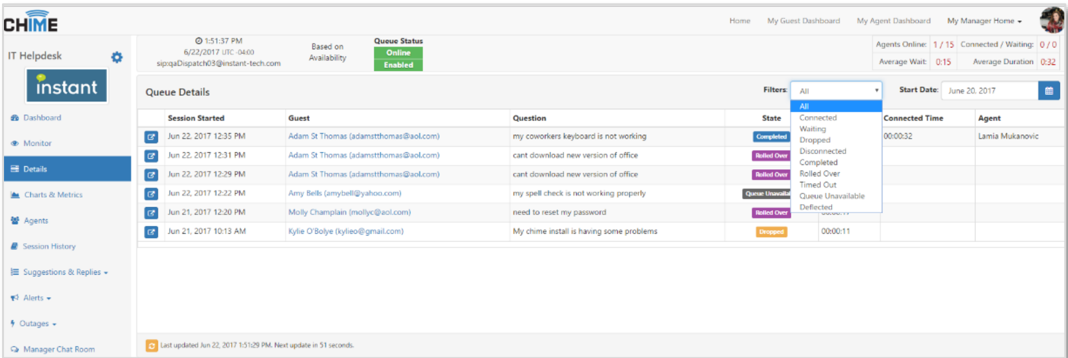

Figure 7: Filters on Details Section

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:

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

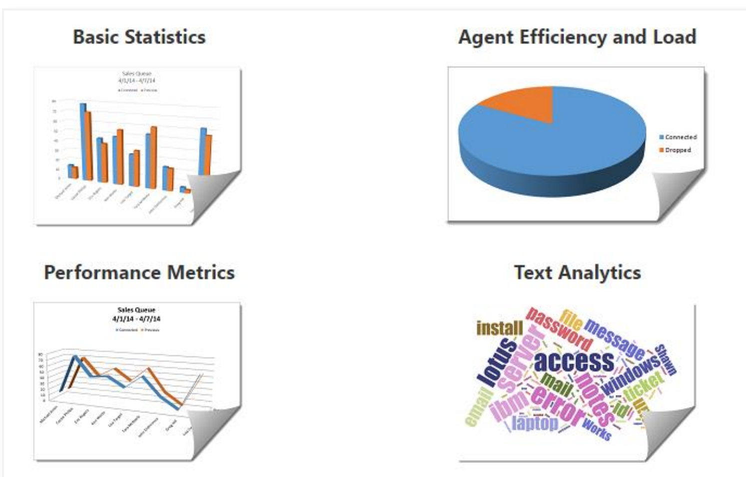

Figure 8: Charts & Metrics

BASIC STATISTICS

This section allows for Reviewers to view Charts and Reports that give high-level information about the Queue. Some of the charts include:

- Average Speed To Answer Over Time
- Average Chat Duration
- Conversations By Guest
- Number Of Connected Chats
- Queue Availability

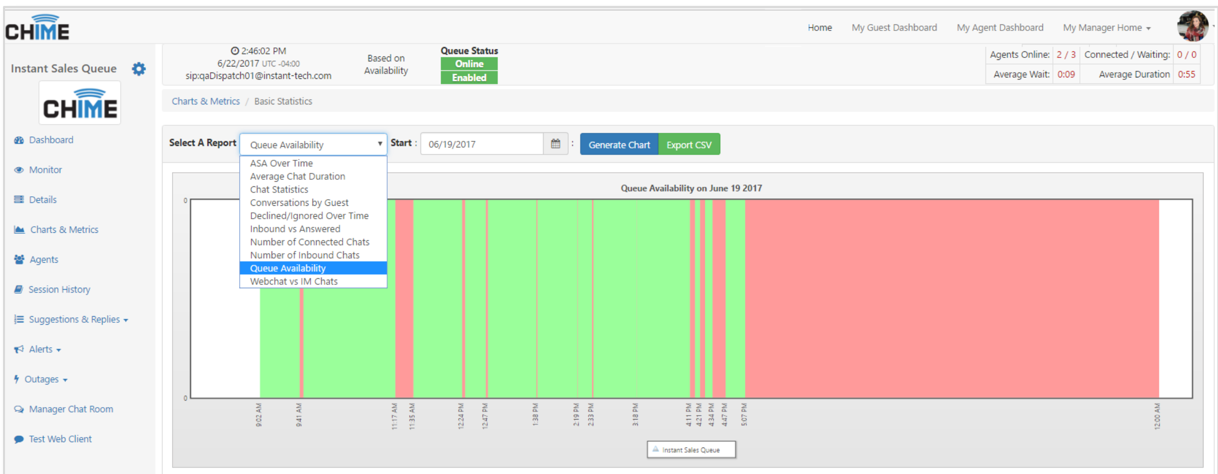

Figure 9: Queue Availability Chart

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.

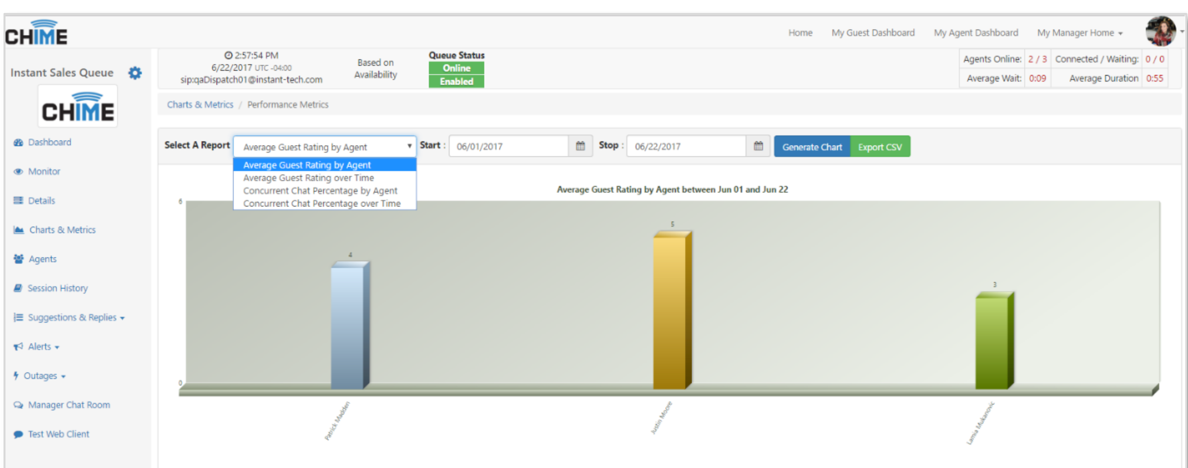

Figure 10: Average Guest Rating by Agent Chart

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.

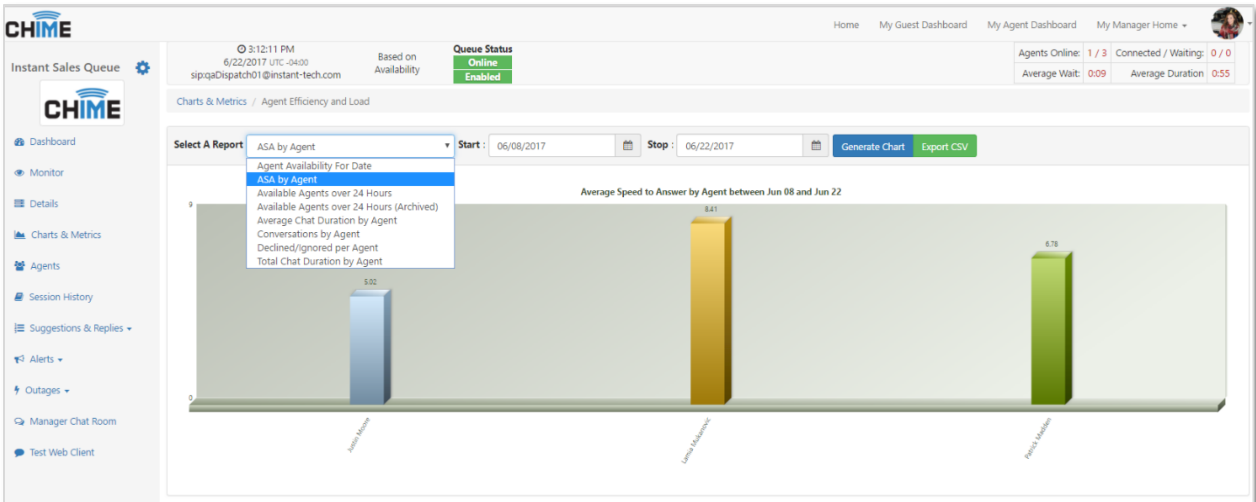

Figure 11: Average Speed to Answer by Agent Chart

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.

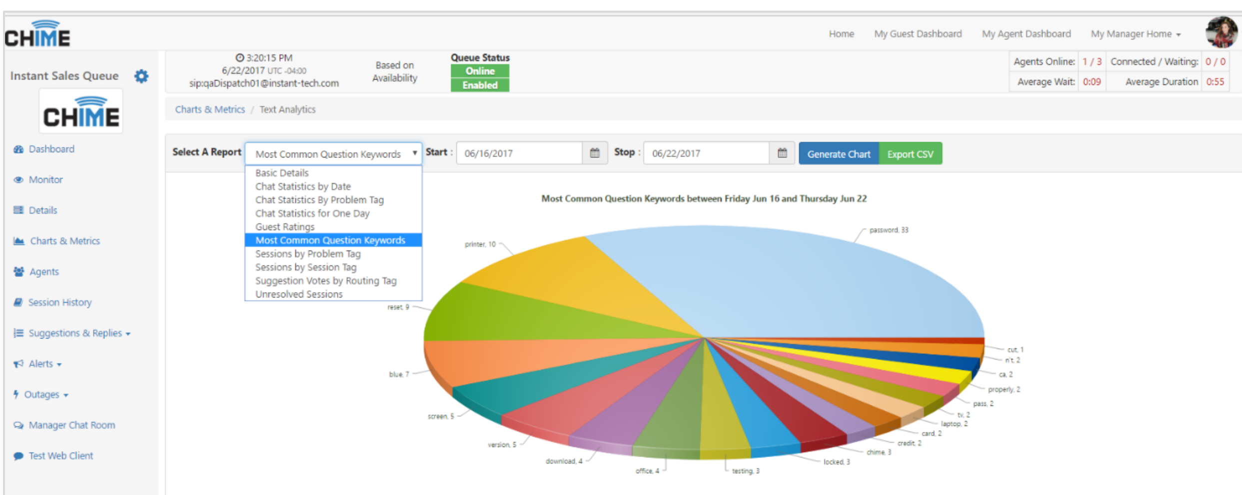

Figure 12: Most Common Question Keywords Graph

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AGENTS

The Agents page is where a Reviewer 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. Additionally, the Reviewer is able to toggle the Agents availability on the queue by toggling Enabled and Disabled for the Agent.

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

SUGGESTIONS

In this section Reviewers can view Suggestions on Tags for each queue. These Suggestions are helpful for Guests by having prewritten common questions and answers without starting a chat. **Note**: Reviewers are not able to create, edit, or delete Suggestions, but they are able to view the Suggestions.

STANDARD REPLIES

Reviewers can create Standard Replies for Agents to use during chats. To create a Standard Reply go to My Manager Home → System Dashboard →Queue Dashboard →Suggestions & Replies → Standard Replies

CREATING A STANDARD REPLY

To create a new standard reply, click 

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.

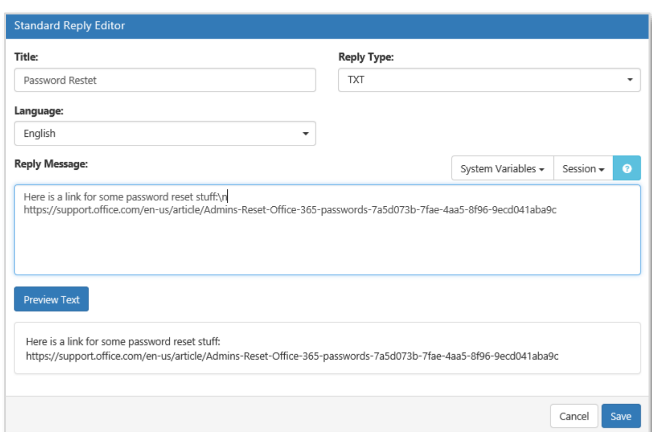

Figure 13: Creating Standard Reply

DELETING A STANDARD REPLY

Standard replies can be deleted by clicking the  button.

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.

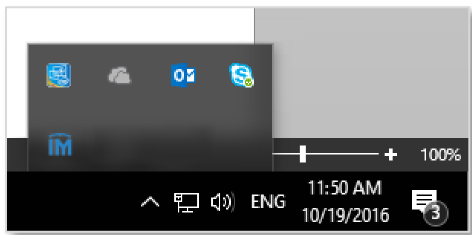

Figure 14: Alerting App – System Tray

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.

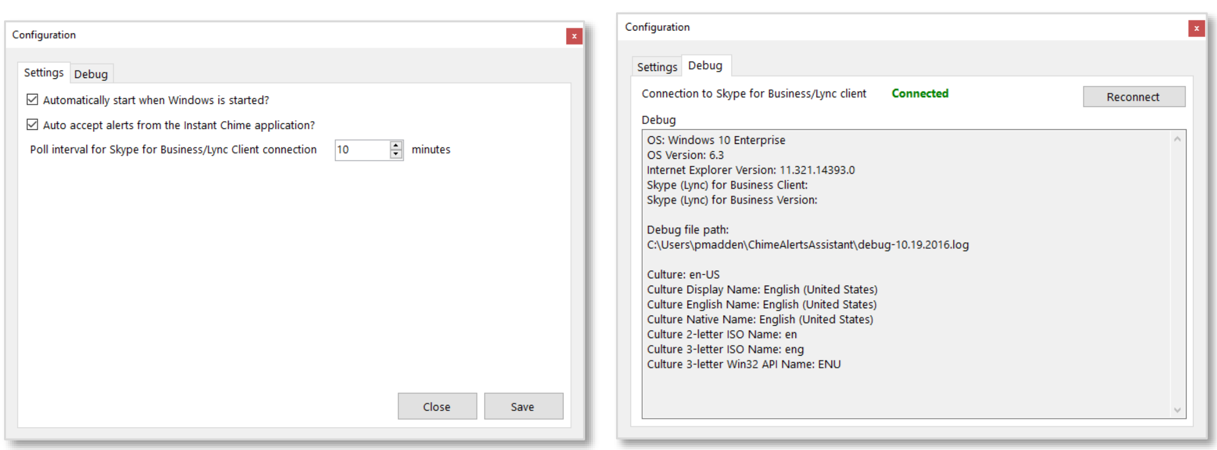

Figure 15: Alerting App – Settings and Debug

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.

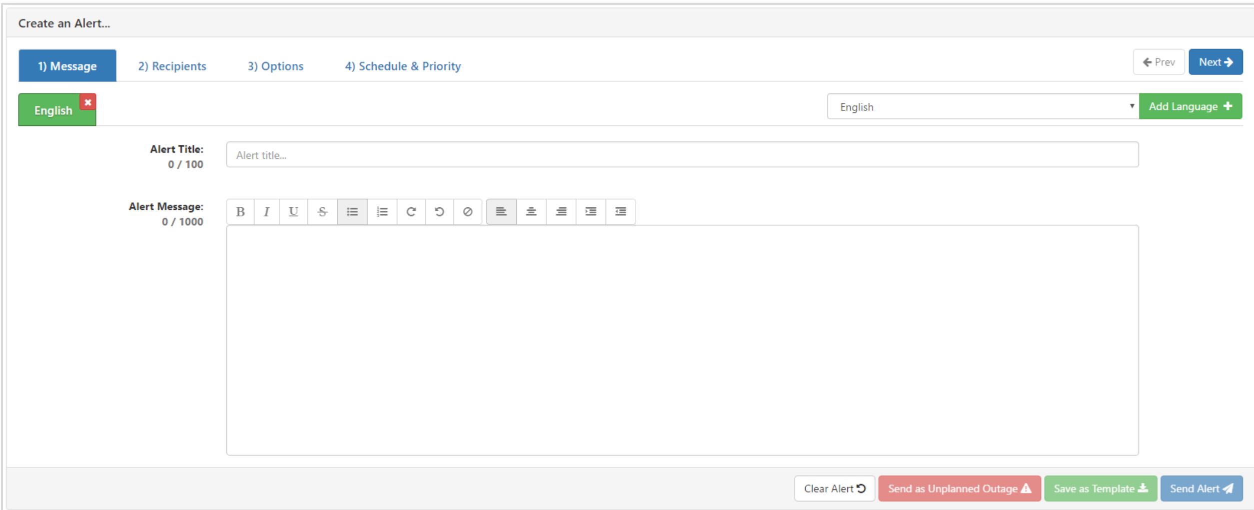

Figure 16: Alert Message

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.

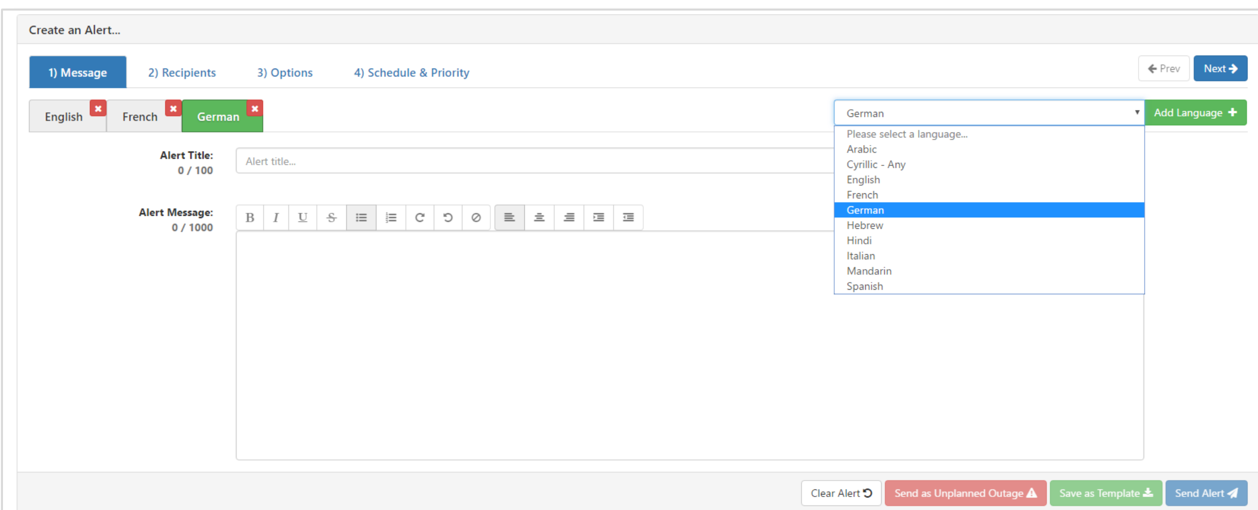

Figure 17: Adding Additional Languages

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.

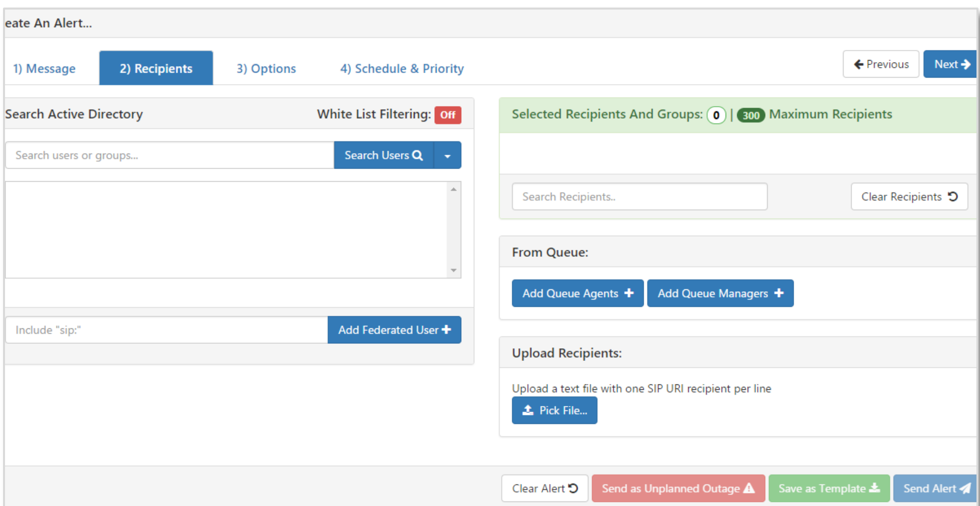

Figure 18: Alert Recipients

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.

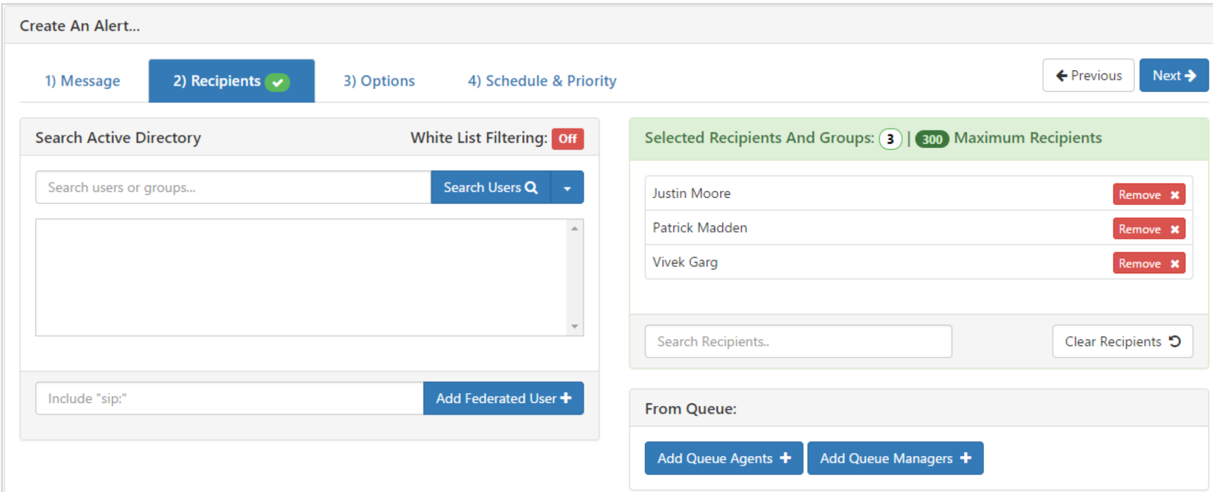

Figure 19: Added Recipients

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.

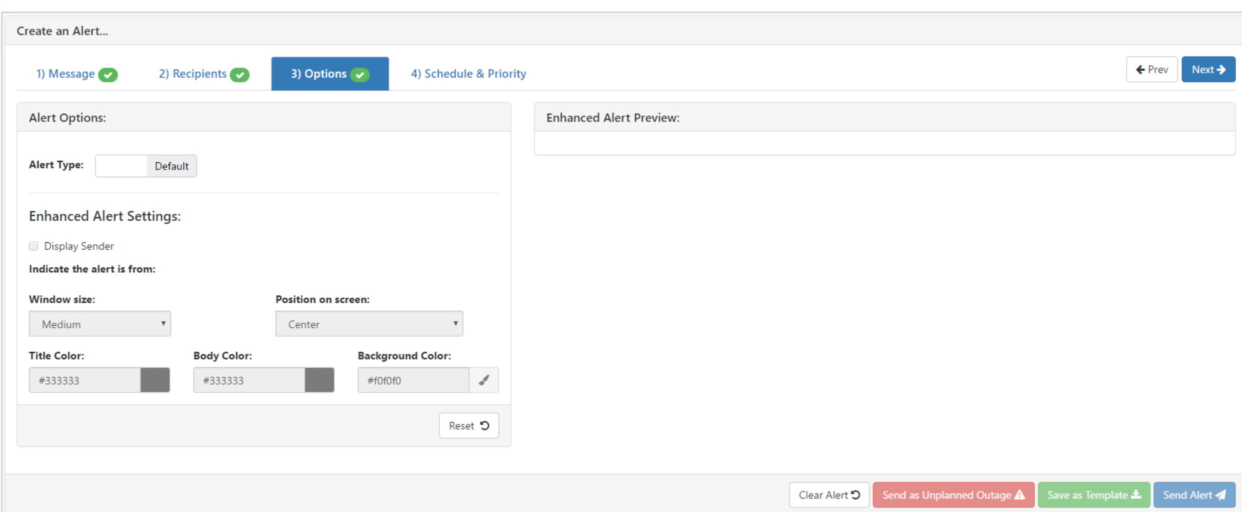

Figure 20: Alert Options

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.

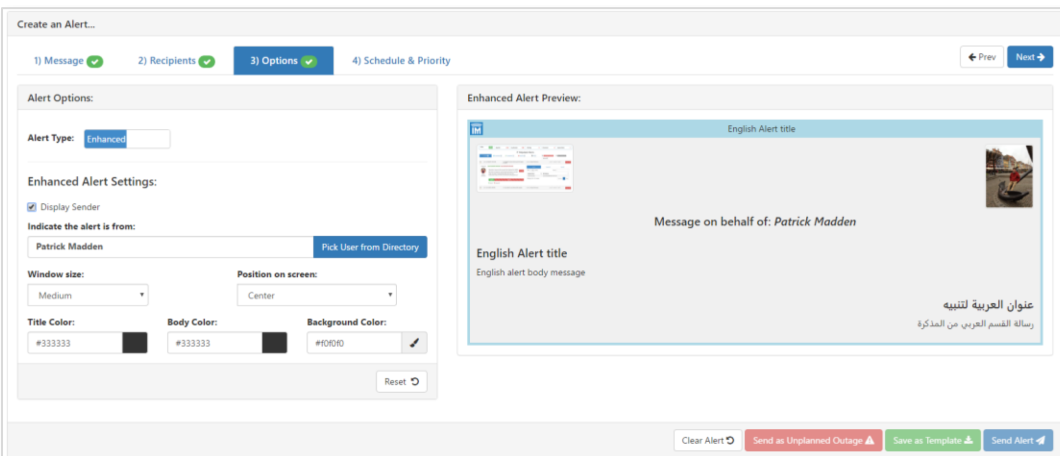

Figure 21: Enhanced Alert Features

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.

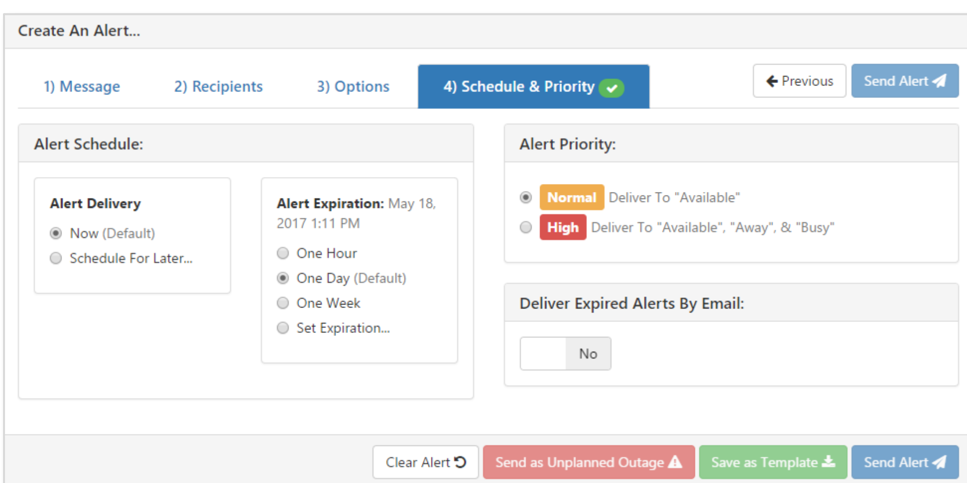

Figure 22: Alerts Schedule & Priority

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.

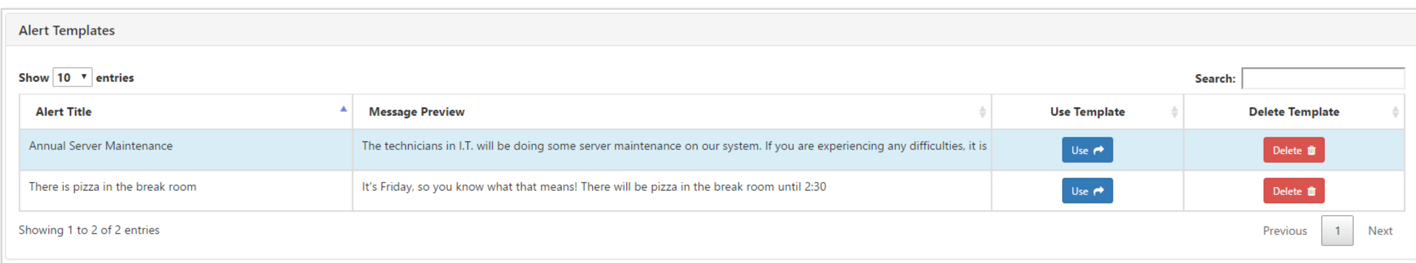

Figure 23: Alert Templates

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.

Figure 24: 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.

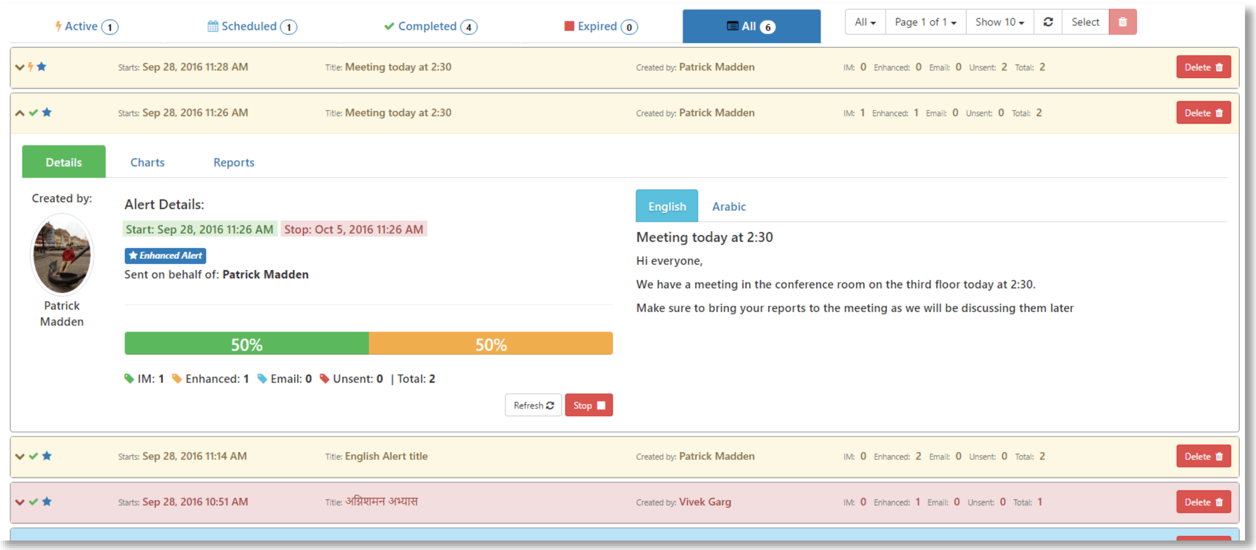

Figure 25: Alert Details

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.

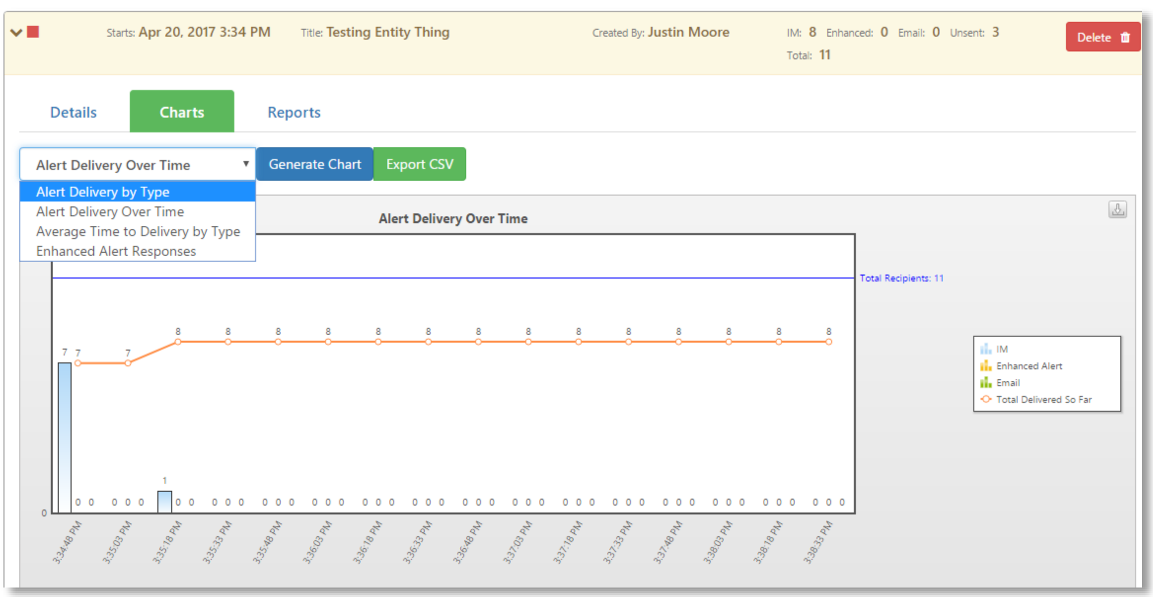

Figure 26: Alert Charts

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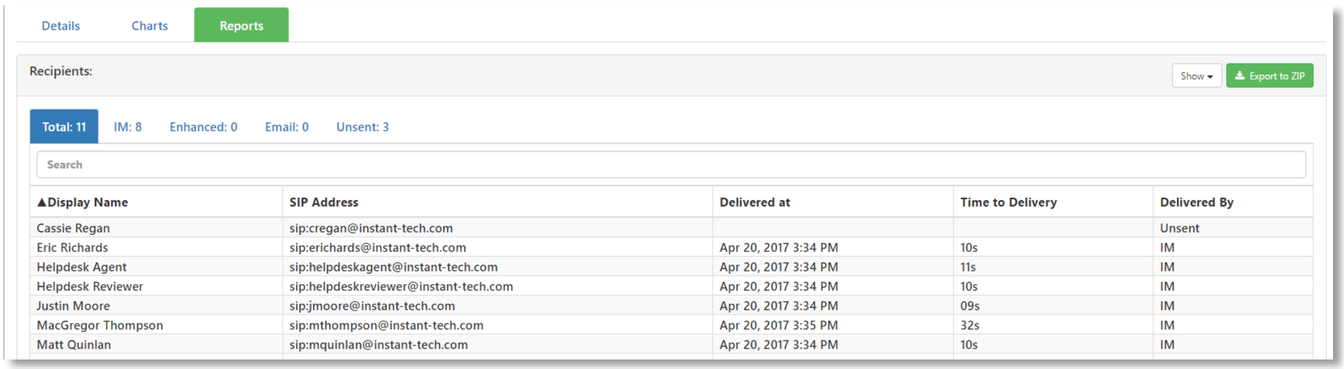
The Reports tab shows the recipients of the alert and how they have received the alert. The five sections in reports are Total, IM, Enhanced, Email and Unsent. Going through the tabs can give you a better understanding of who has received the alert, what method they received it by, and how long it took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



▲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 27: 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 an Admin.

OUTAGES

The Outages page is where you can go to notify the Guests who are routing into 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.

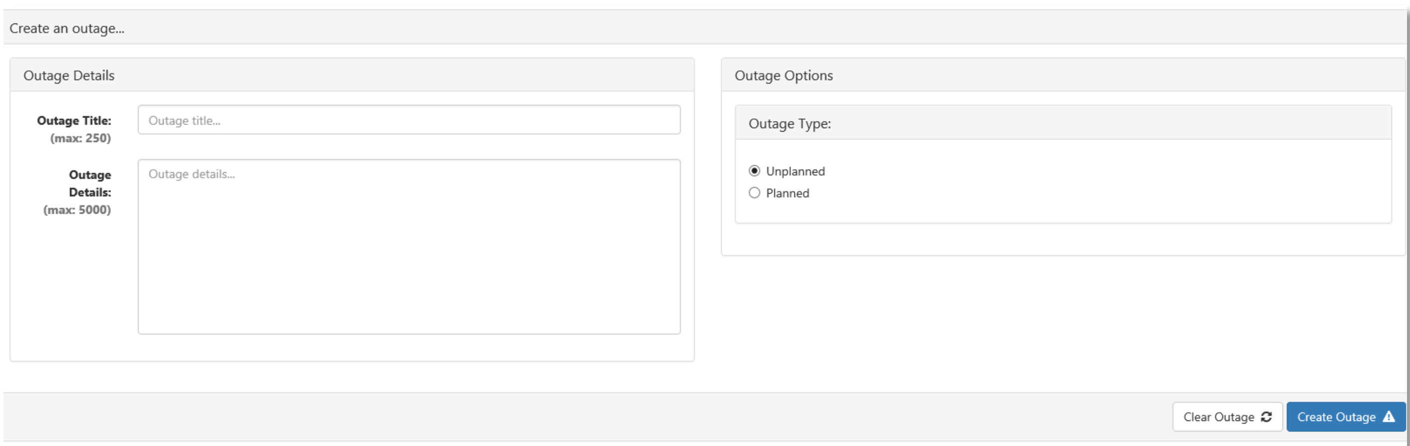

Figure 28: Outage Title & Details

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.

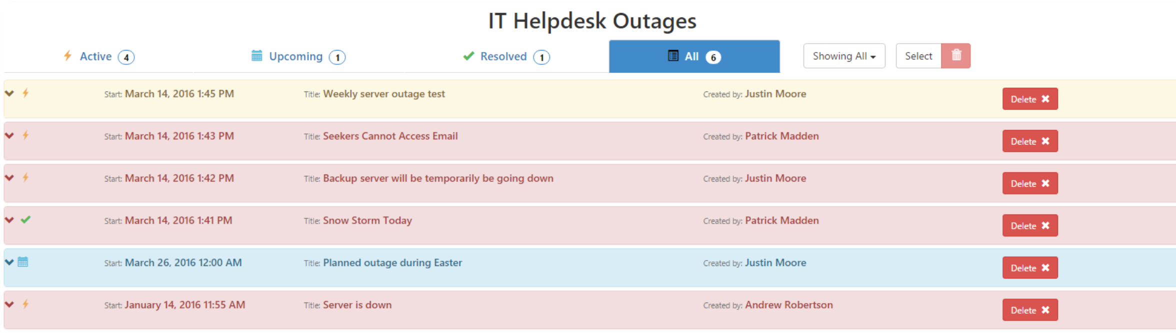

Figure 29: Outage History

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

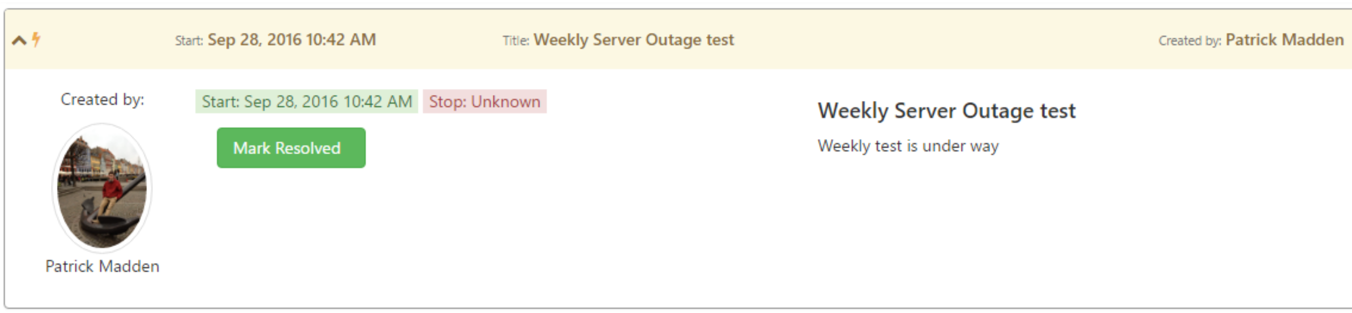

Figure 30: Expanded Outage