Chime 2.6

QUICK GUIDE TO SETUP AN ALERTING QUEUE

Spring 2017

Contact Information

See our website for Customer Support information.

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

CONTENTS

Rev 4 - JM
May 17 2017

CHIME ALERT NOTIFICATION USER GUIDE

INTRODUCTION

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.

WHAT ARE ALERTS?

Alerts for Chime allow you to easily create and send out alerts to employees in your company's Active Directory, as well as Skype for Business users outside of the company. Alerts can be fully customized: you can choose when they are sent, whether they are sent out on a schedule, when they expire, and what priority they are. Templates can be created for the alerts so that you can send out similar alerts for ease of use. Additionally, there is support for alert history, allowing managers to view sent alerts, view who has received the alerts and who has yet to receive them.

WHAT SHOULD I EXPECT?

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, and other common platforms.

This document will provide an overview of the alert module within the Chime platform and describe how to initialize and configure the Chime environment. This guide will provide ways to avoid conflictions that might occur with the inbound (click-to-chat) features of Chime.

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 OF WHAT'S COVERED

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

- Setting up a queue
- Adding people into the queue
- Different types of alerts
- Alert settings
- Avoiding conflicts with the click-to-chat features in Chime

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 your 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:

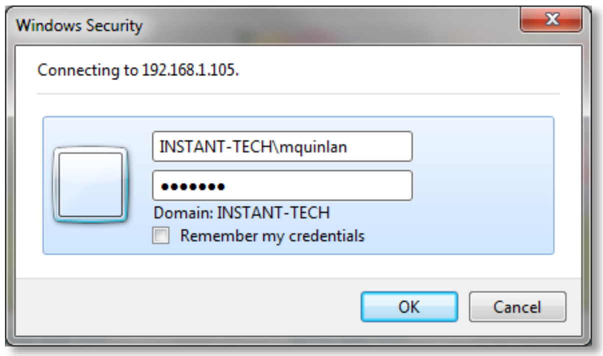
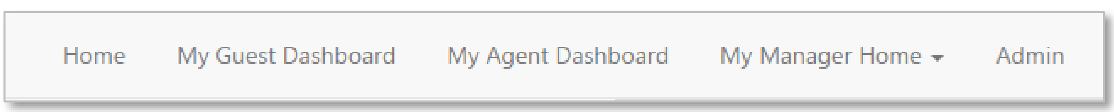


Figure 1: Windows Authenticated Login

LAYOUT OF CHIME 2.6

When you first log onto Chime, you will be brought to the Home page. For the purposes of this guide, you will not need to use this page. In the top-right of the page you will see that there is a navigation bar that allows you to navigate the Chime App. The options there are labeled: Home, My Guest Dashboard, My Agent Dashboard, My Manager Home, and Admin.



GETTING STARTED

Chime, along with providing service desk functionality, has the ability to send out alerts. To use the alerting functionality, we will need to create and populate a queue that will be used to distribute the alerts. Creating a queue and adding agents just requires a few easy steps:

1. **Create a Queue:** When we create the queue, we will be assigning a license to the queue and a dispatcher.
2. **Add People to a Queue**: Here we will add people to the queue. After the People have been added to the queue, they can create alerts and manage the alert history.

Note: For this guide Chime must be installed and the account you are logging on to Chime with MUST have been picked as Admin in the installer. Additionally, the Admin section has to be configured to have at least one dispatcher added, people added, at least one license key added, and SMTP settings set up. For more information on this see the “Chime Application Setup Guide”.

CREATE A QUEUE

The Manage Queues page is where you can add, edit, and remove queues within Chime. When you open the Manage 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
>
> **Language:** Marks the queue as being associated with a specific language
>
> **License:** Select a license key that the queue will use

You must also select a dispatcher that this queue will use to distribute out the alerts that are created. Click on **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.

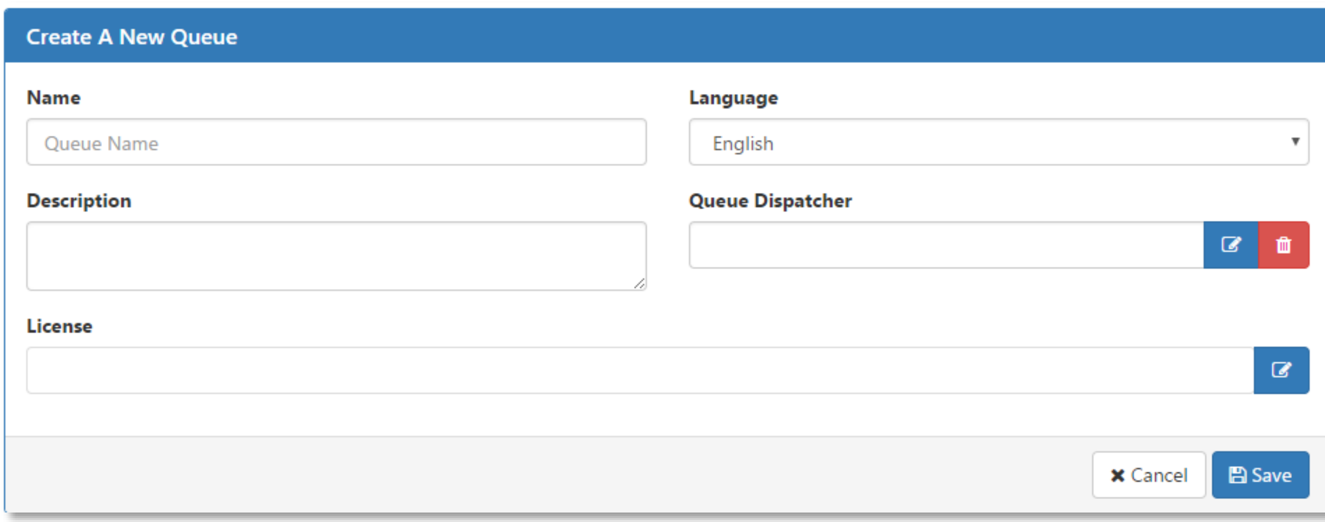


Figure 2: New Queue Settings

Click **Save** to create the new Queue

EDITING A QUEUE

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

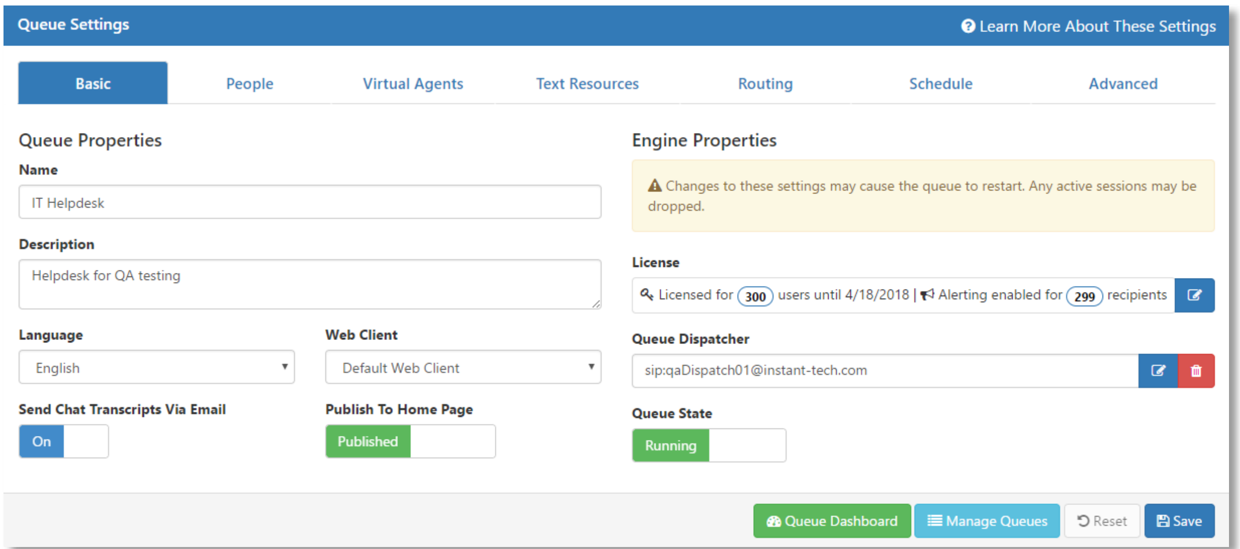


Figure 3: Edit queue settings

BASIC SETTINGS

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

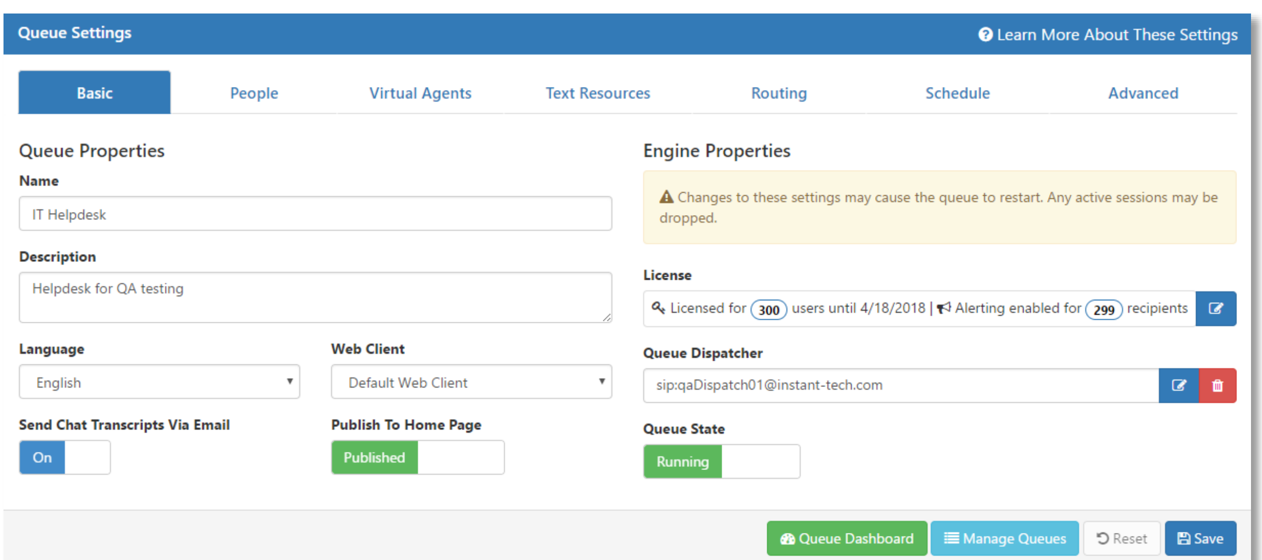


Figure 4: Basic Queue Settings

ADD PEOPLE TO A QUEUE

PEOPLE SETTINGS

The People settings page allows you to add people that can be given different permissions.

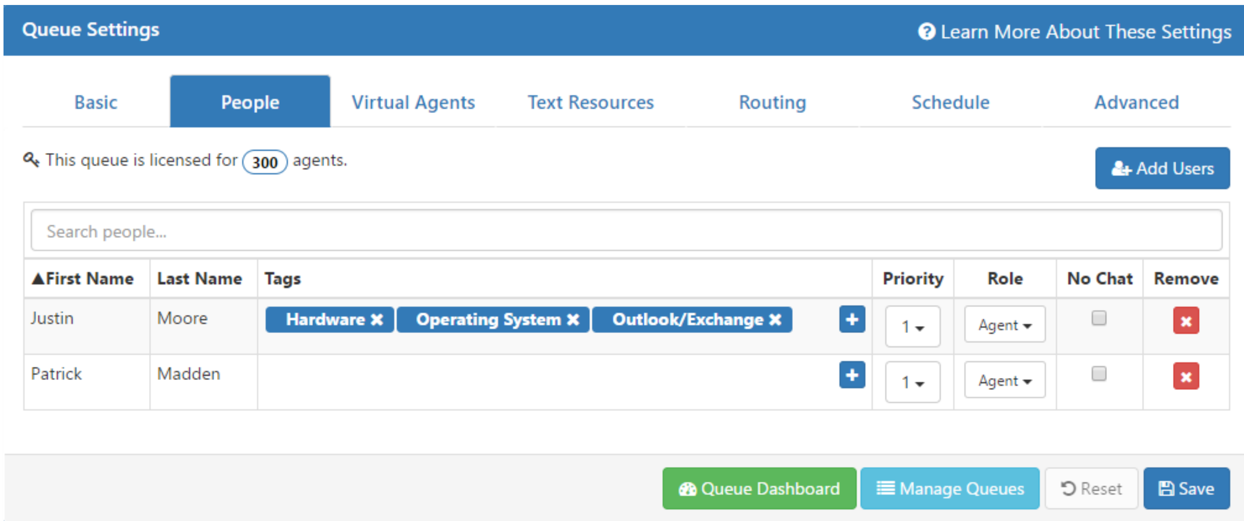


Figure 5: Queue People

You can add people to the queue by clicking on the **Add Users** 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 name below the grid. You can select multiple users to add, and clicking the X next to a user's name in their badge will remove them from the list of users to add. Once you are done selecting users, click **Save**, and they will instantly be added to the queue.

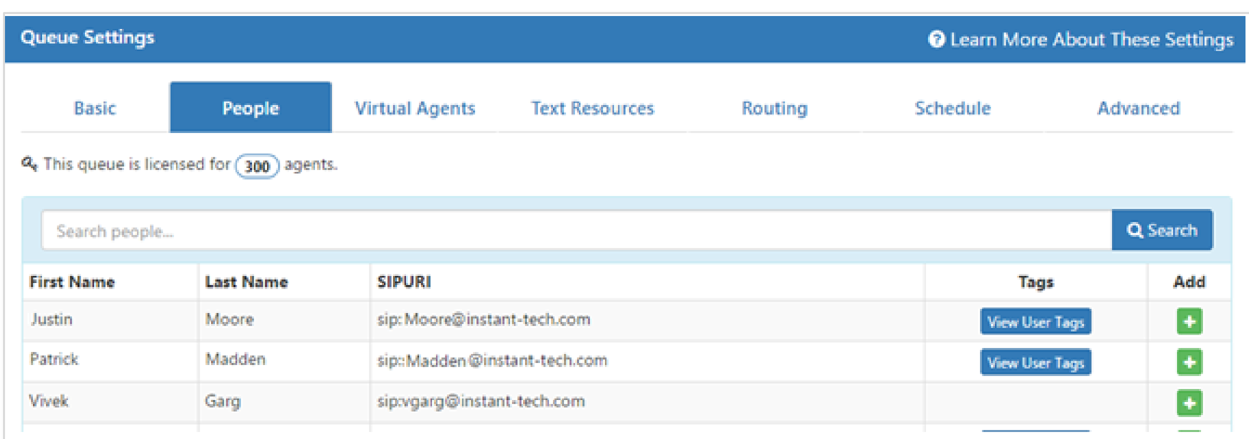


Figure 6: Selecting users from the picker

When you add a user to the queue they will initially be assigned a role. These roles are the queue specific permissions that each person in the queue has. To change them you must be in the queue settings and navigate to the People settings page.

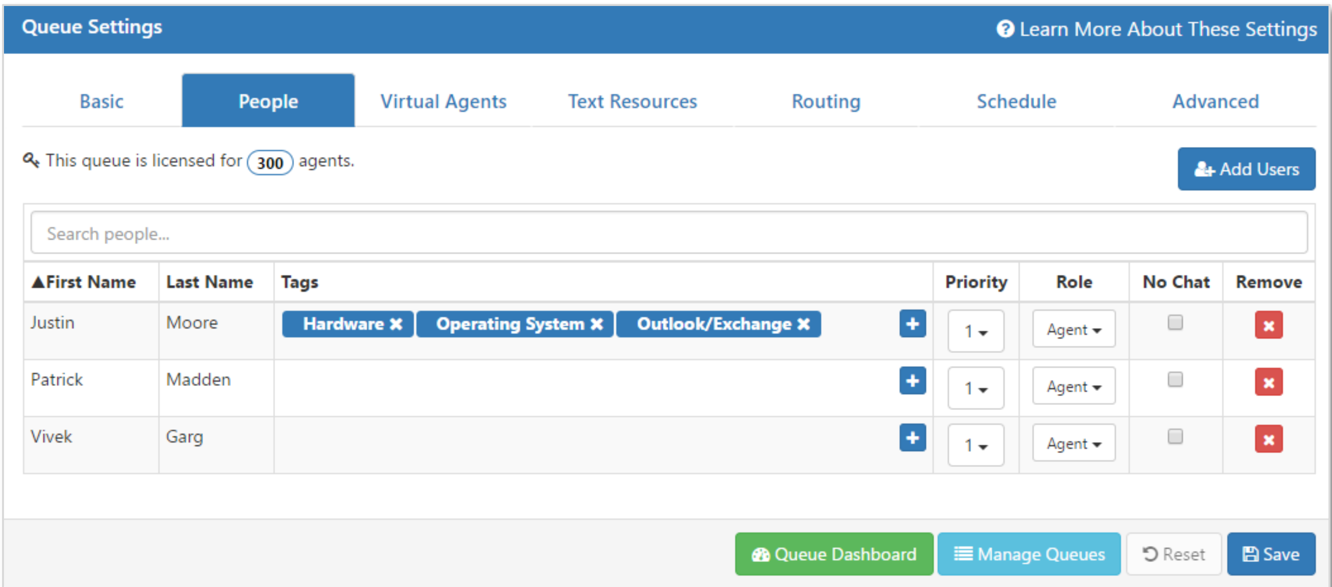


Figure 7: Queue People

Each person in the queue has their own specific role setting that can be found in the Role column. There you will find a dropdown menu that presents the 3 roles that a person can have in a queue. Clicking the role you want to set for the person will change the role associated with them, but for the settings to take effect, you must click Save at the bottom right of the Queue Settings modal. *Note: If a person is an admin, their permissions will not be affected by changing their role.*

The three roles that can be assigned to a person are: Agent, Reviewer, or Manager. To allow people assigned to the queue to send alerts, they must be given the Manager role in the queue. This allows that person to edit queue settings and view queue dashboards and create, send and review alerts. If someone is an admin, they will also be able to access these same settings and the queue dashboard.

As an alternative to setting someone as a Manager, there is another role that works similarly; Reviewer. Setting someone as a Reviewer allows that person to access the queue dashboard and all of the associated menus in the queue. However, they will not be able to edit queue settings. This essentially allows them to be able to create alerts, but not modify the queue.

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

ALERTS

QUEUE DASHBOARD

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

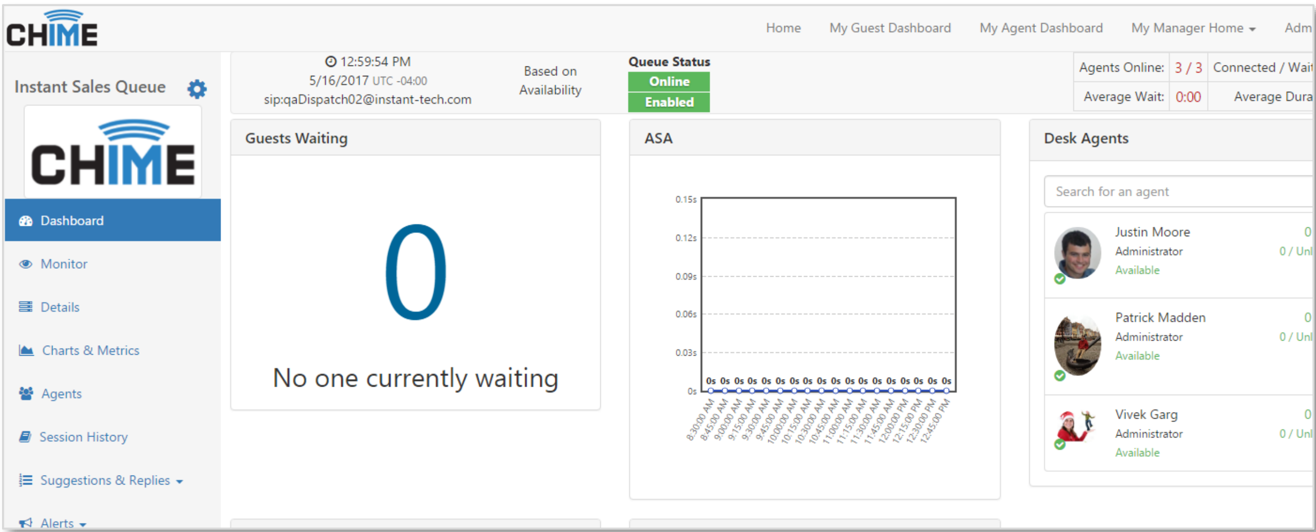


Figure 8: Queue Schedule – Choose time

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 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.

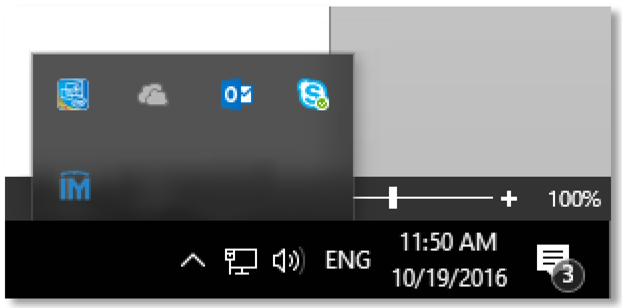


Figure 9: Alerting App – System Tray

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.

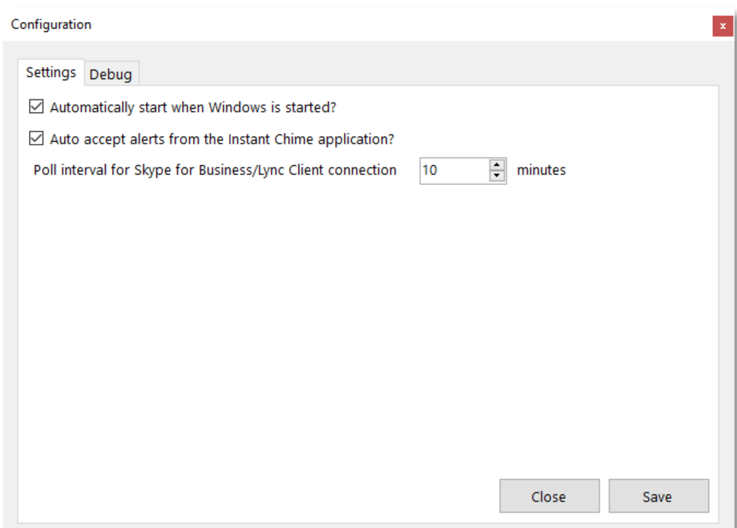


Figure 10: Alerting App -- Settings

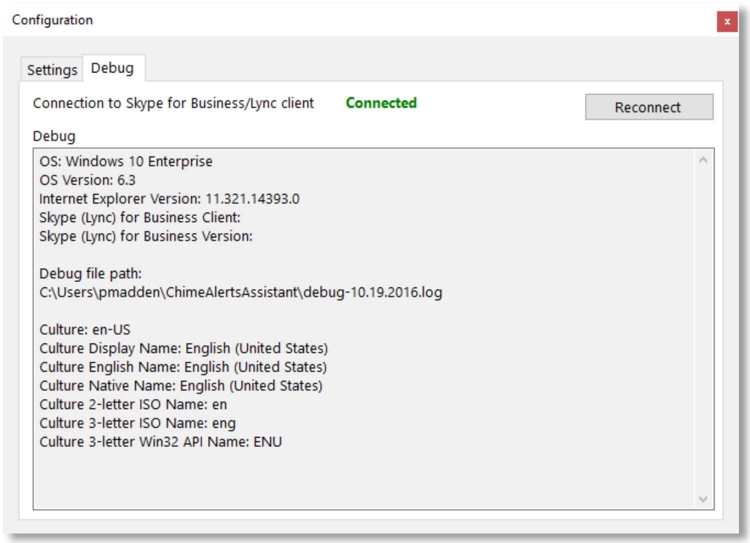


Figure 11: Alerting App -- Debug

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.

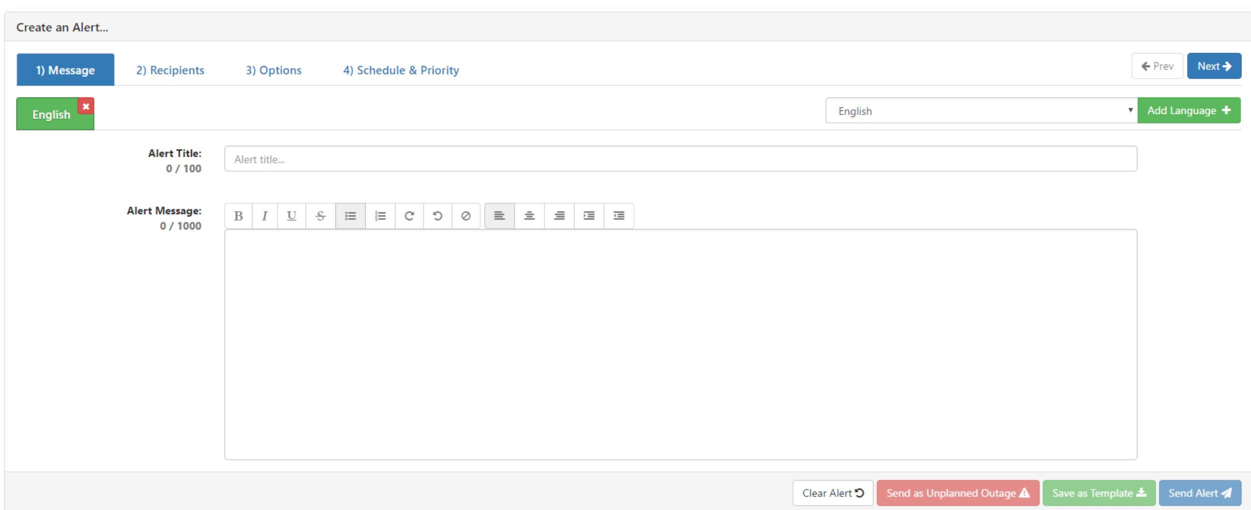


Figure 12: Alert Message

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.

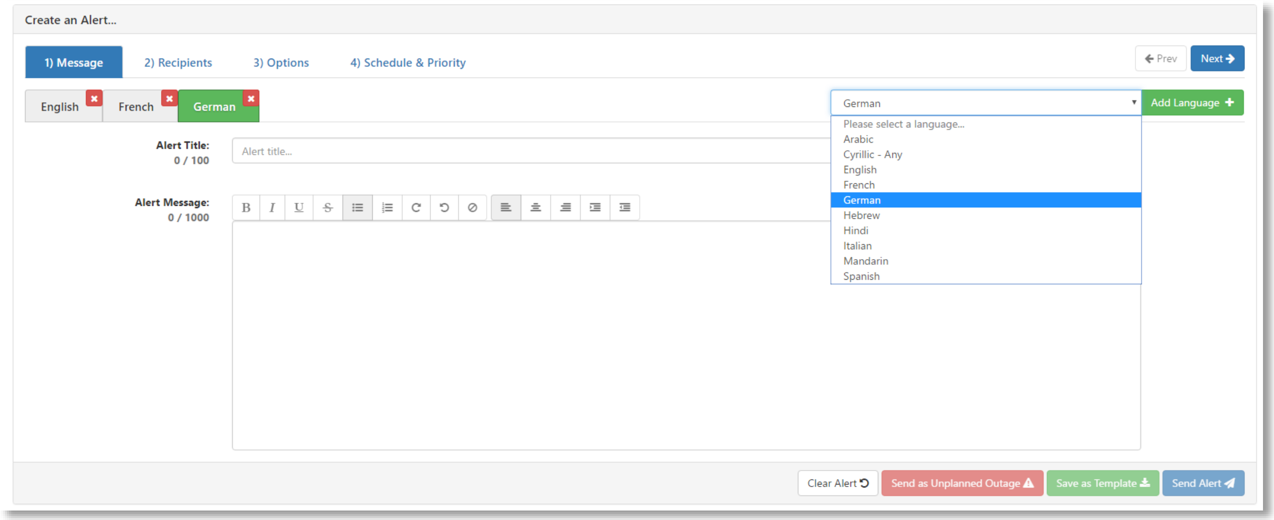


Figure 13: Adding Additional Languages

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.

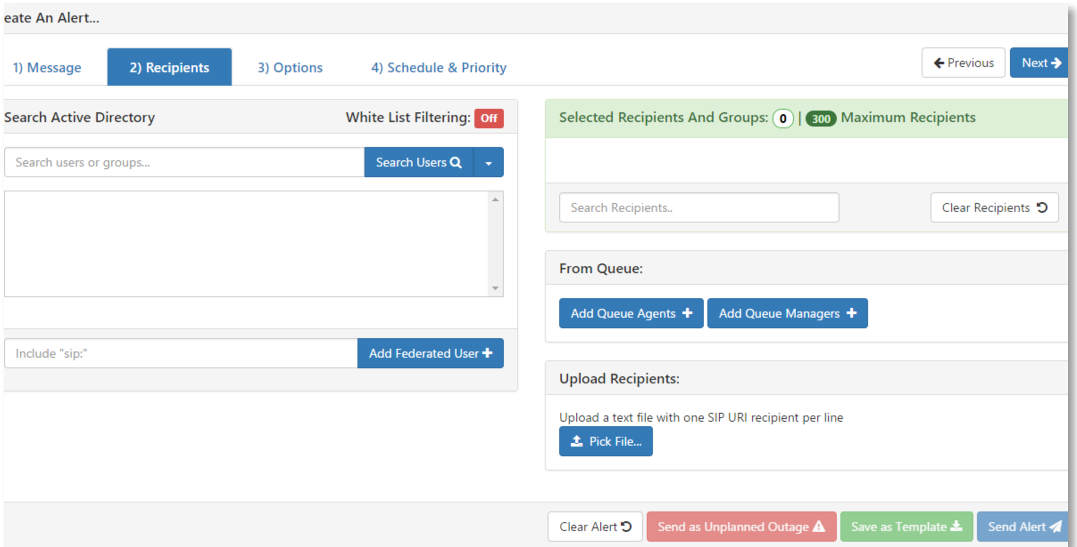


Figure 14: Alert Recipients

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.

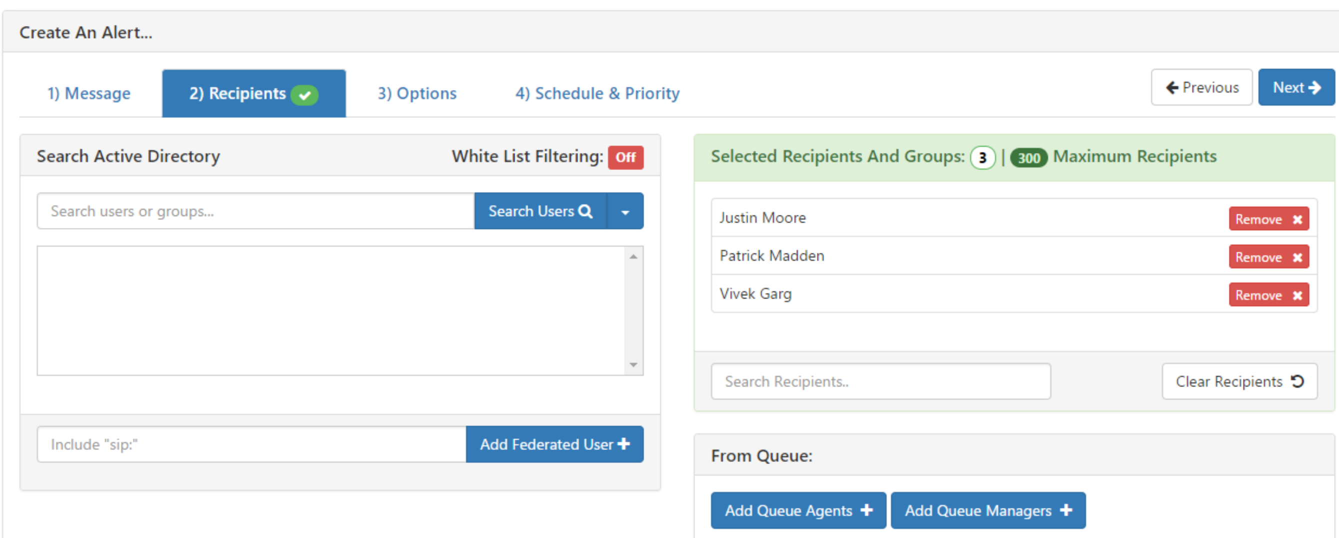


Figure 15: Added Recipients

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.

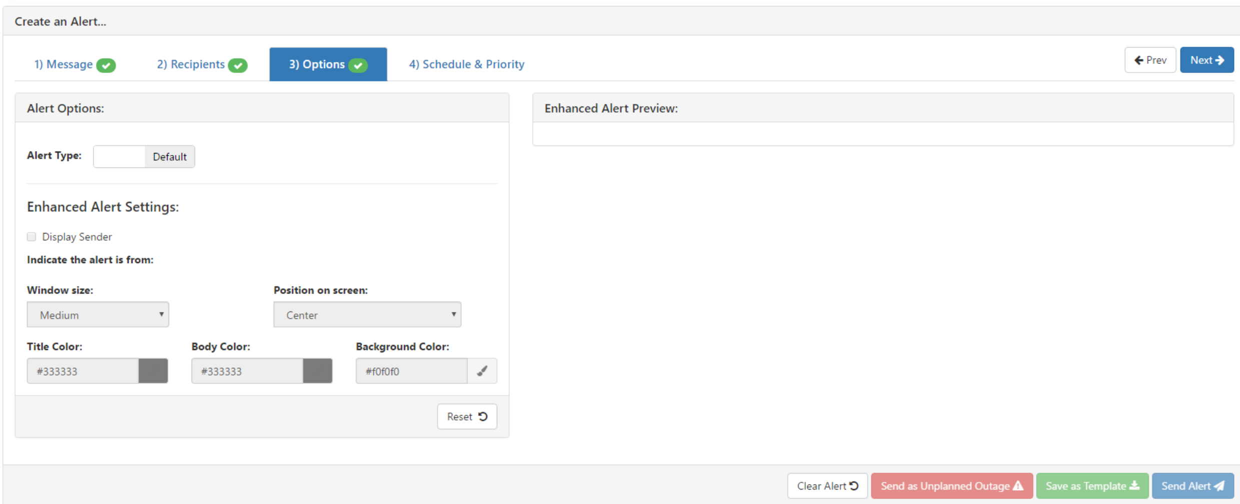


Figure 16: Alert Options

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.

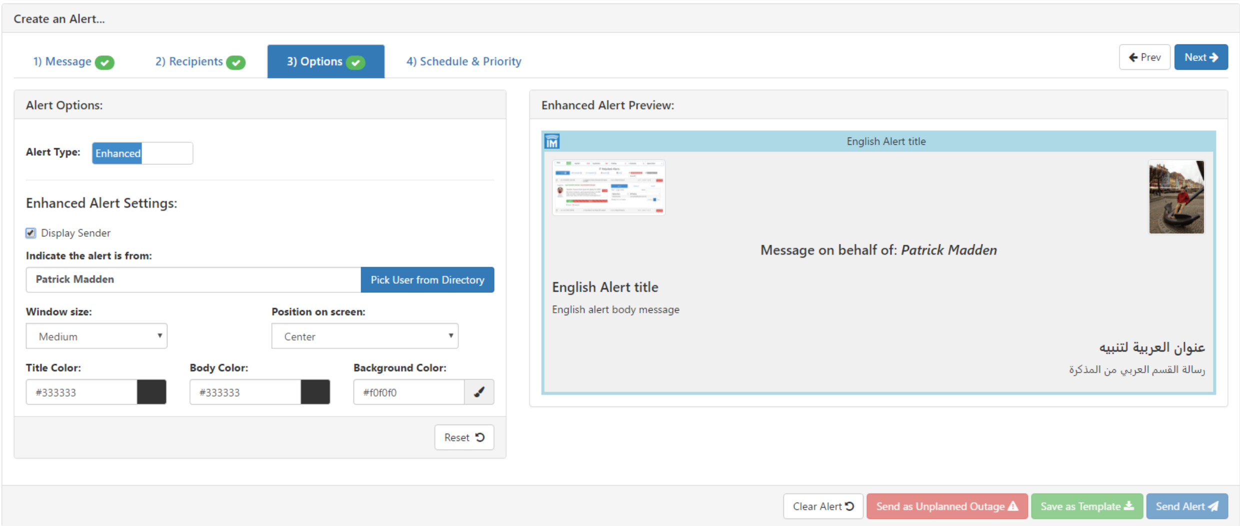


Figure 17: Enhanced Alert Features

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.

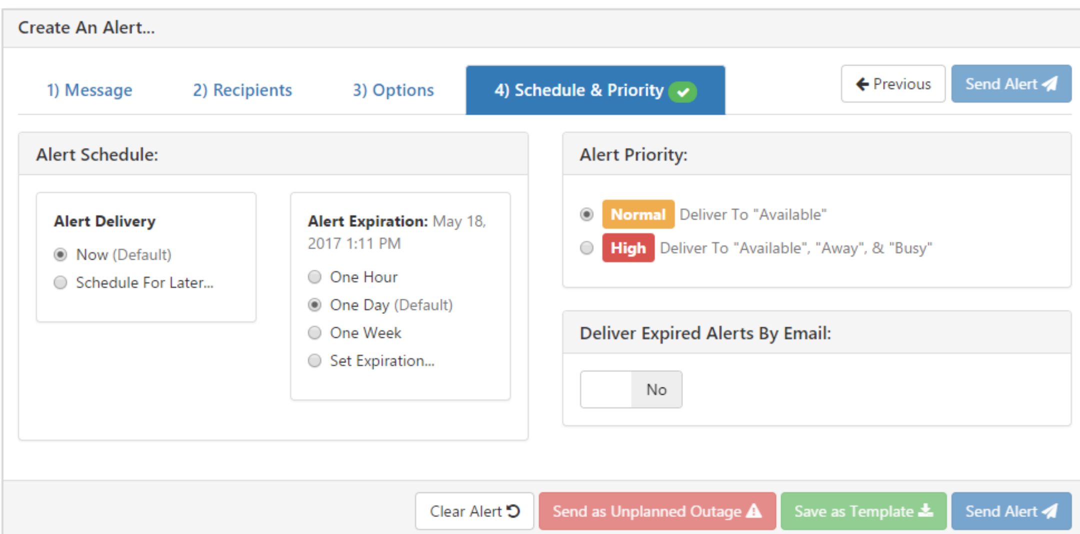


Figure 18: Alerts Schedule & Priority

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.

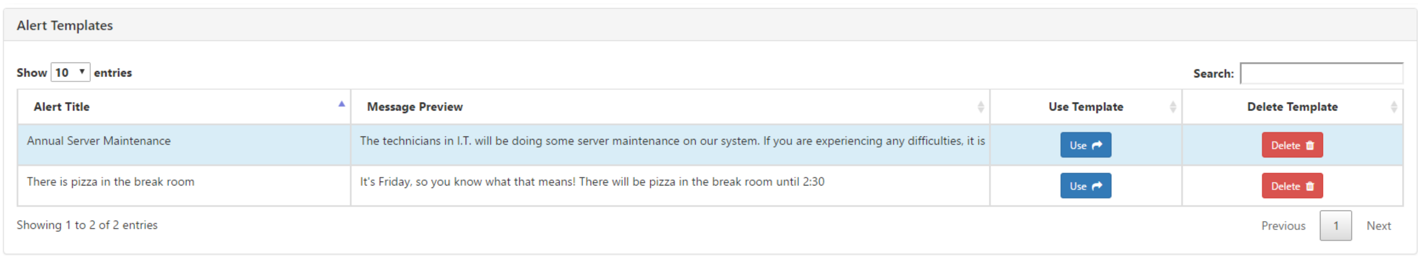


Figure 19: Alert Templates

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 20: 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.

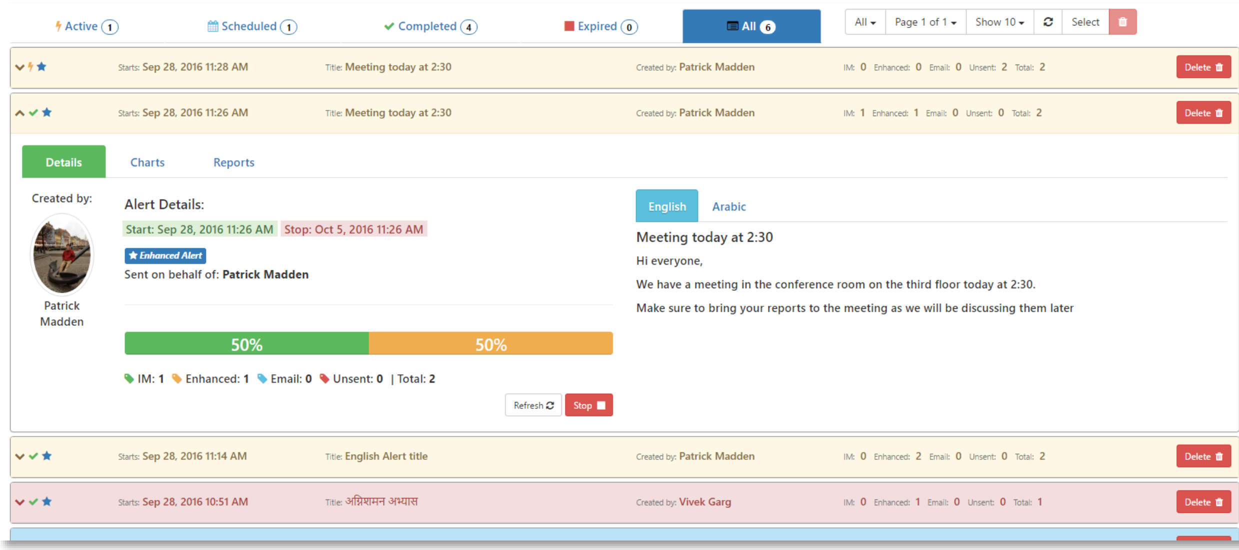


Figure 21: Alert Details

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.

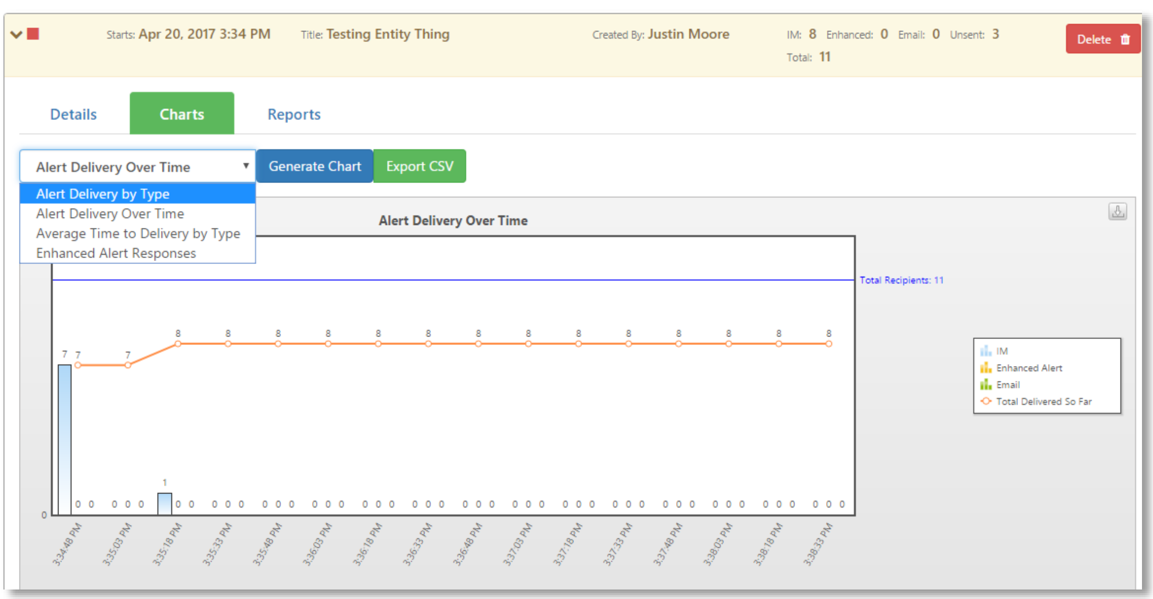
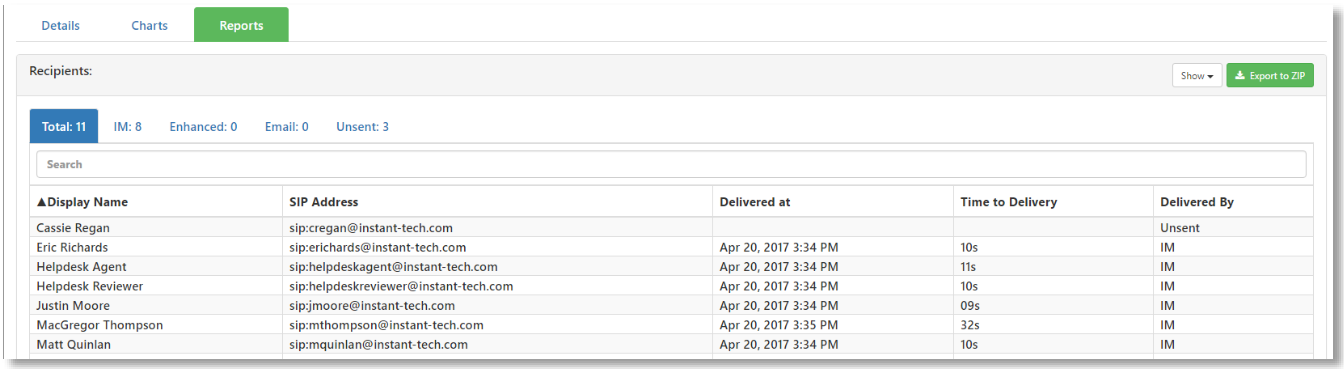


Figure 22: Alert Charts

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



▲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 23: Alert Reports

DELETE AN ALERT

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

ALERT SETTINGS

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

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

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

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

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

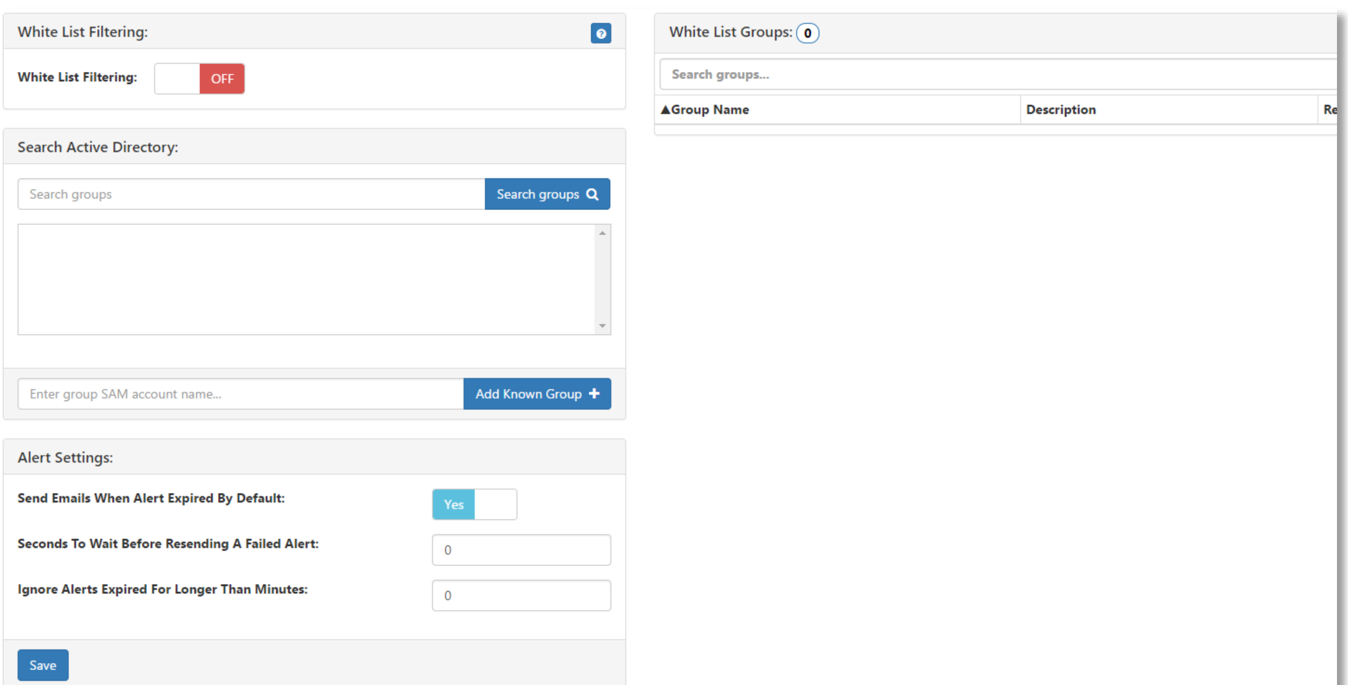


Figure 23: Alert Settings

AVOIDING CONFLICTIONS WITH CLICK-TO-CHAT FEATURES

Chime is a multi-purpose service and because of that, you may encounter overlapping parts of the inbound and outbound branch. To mitigate the ways this can happen, this section of the user guide will be devoted to covering the settings you can configure to minimize the unwanted interactions with the click-to-chat section of Chime.

AGENT STATE

The Chime click-to-chat service deals more with the queues than the Alert messaging side of Chime and as a result, the roles of a person in a queue will have to be slightly different.

The click-to-chat side of the app uses agents to accept chat requests from users that have questions needing to be resolved. As a result, the agent role does not have access to any of the alert functionality (or access to the queue dashboard at all) and when setting up a queue for alerts only functionality, it is recommended that none of the people assigned to the queue should be assigned the agent role.

The reviewer or manager role are more suitable for someone who will be in an alert-based queue. The main differences between these roles are levels of access. The manager is able to access the queue dashboard and all of the settings that go along with the queue, while the reviewer role only has access to the queue dashboard. Both the reviewer and manager have access to the alerts for that queue. Managers are essentially the admin of the queue, while the Reviewers have enough access to the queue to send and review alerts.

To avoid any scenarios where one of the managers or reviewers are sent requests for click-to-chat it is recommended that Set all people to “No Chat” mode. The option for “No Chat” is located directly to the right of the Role column in the Queue Settings modal.

TEXT RESOURCES

The click-to-chat section of chime utilizes Lync to connect Agents to Guests who have questions/issues that need to be resolved. Because of this, Chime has a system in place that sends out automated messages to users. To make these messages less confusing they are customizable. To customize these messages you will need to modify the fields of your text resource. To do this, you will need to navigate to the Admin page, then to “Settings” and finally “Text”.

Click on the button for the DefResource. This will open up a modal that will allow you to edit the specific text resource messages. Pressing the button allows you to change the text associated with the message. These are the specific text resources that should be changed to avoid confusion:

Guest Text:

- Welcome Message
- Searching for Person

Agent Text:

- Queue Message

System Text:

- Queue Offline
- Prompt for additional text entry

It is recommended that you set the text resources to read “This is an alert only Queue. Chat functionality will not work with this dispatcher”. When finished click “Save” and the changes will be implemented.