



## INSTALLATION GUIDE

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# CHIME INSTALLATION GUIDE

## SYSTEM REQUIREMENTS

- 64-bit Windows Server®: 2008 R2, 2012, 2012 R2, 2016, 2019
- RedHat/Fedora/Ubuntu Linux - 2018 release
- Microsoft SQL Server®. The application supports full SQL Server® or SQL Express Edition®
- IBM DB2
- Oracle MySQL
- Configured Slack bot registration for API access (refer Chime Prerequisites)
- 1+ Slack Bot registered bots per queue
- Slack subscription

## HARDWARE RECOMMENDATIONS

The following are the recommended hardware configurations for Chime

# of Queues	# of Agents	RAM	Processor	Data Storage	DB Size
1 to 5	10	8 GB	Dual Core	100 GB	1 GB
5 to 20	10 to 30	12 GB	Quad Core	200 GB	2 GB
20 +	30 +	16 GB	Quad Core	200 GB	3 GB

It is recommended to have a dedicated VM instance for Database server.

### Additional Information

- 1 SSL Certificate
- Publicly available hostname/IP address for Chime instance
- WebSphere Support: WebSphere 9 with JDK 8
- Tomcat Support: Apache Tomcat 8 or above with JDK 8 or above

### Hostname and Firewalls

The Chime server will need to have a publicly addressable DNS hostname and public IP address in order for Slack Cloud Service to be able to deliver chat messages to the Chime server. Additionally, it will be necessary to allow incoming traffic on port 443 (HTTPS).

### SSL Certificate

To set up a Chime, you will need to acquire an SSL certificate. This certificate will be installed on the same server that the Chime instance will be deployed on. Without this certificate installed, no users will be able to authenticate into the web app. Self-signed certificates won't work, Certificates should be from a valid SSL issuing authority like: GoDaddy, Thawte, Symantec etc... The certificate must have a Subject and Subject Alternate Name which matches the public hostname of the Chime application server, as will be configured for the Reply URL in the Slack Application Registration.

## REQUIRED ACCOUNTS

The following accounts will be needed for the installation and/or operation of Chime.

### SLACK OAUTH TOKEN

OAuth token is used to authenticate users accessing Chime, and to perform directory lookups when adding users to Chime.

Client ID: \_\_\_\_\_

Client Secret: \_\_\_\_\_

OAuth Token: \_\_\_\_\_

### CHIME DATABASE ADMIN ACCOUNT

This account is used to create the Chime database after installation. This account needs SQL authentication with the ability to create the database.

This account information is not stored and is only utilized during creation or updating.

SQL Server Name: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

### CHIME DATABASE SERVICE ACCOUNT

This account will be used by Chime to read and write information to the Chime database.

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Account must have db\_datareader & db\_datawriter rights to Chime database

### DISPATCHER BOTS

Slack bots will be used by Chime to connect requests from a seeker to Slack experts. Each queue will need at least one bot, with additional bots allocated for agents to handle additional concurrent chat sessions.

## INSTALL & CONFIGURATION PROCESS

The install procedure for Chime Slack is as follows:

1. Run Chime installer
2. Run Configuration utility to provide database connectivity details
3. Start Chime Tomcat service and configure administrators, agents and queues
4. **Post configuration: Run Configuration utility to verify that setup mode has been disabled to prevent unauthorized access**
5. Restart Chime Tomcat Service

## CHIME SETUP WIZARD

Once the required accounts have been provisioned for Chime, you are ready to begin the installation of the Chime application.

1. Run Installer and accept the license agreement.



Figure 1: Chime for Slack Installer

2. Specify the install location for your Chime instance.

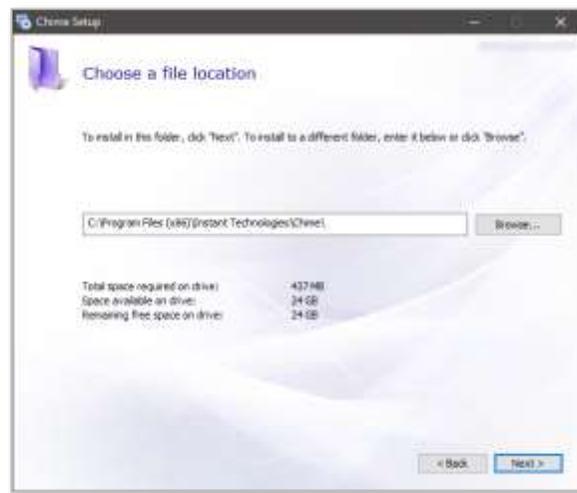


Figure 2: Chime for Slack Pick Install Location

3. Begin the install process. Note: you may need administrator privileges to complete this step.



**Figure 3: Begin Installation**

4. Allow the installer to complete the Chime installation.



**Figure 4: Installation and Completion**

5. Once the install finishes, close the installer.

## CHIME SERVICE

After the installation completes you should see the **Chime Tomcat9** services under the Services list:

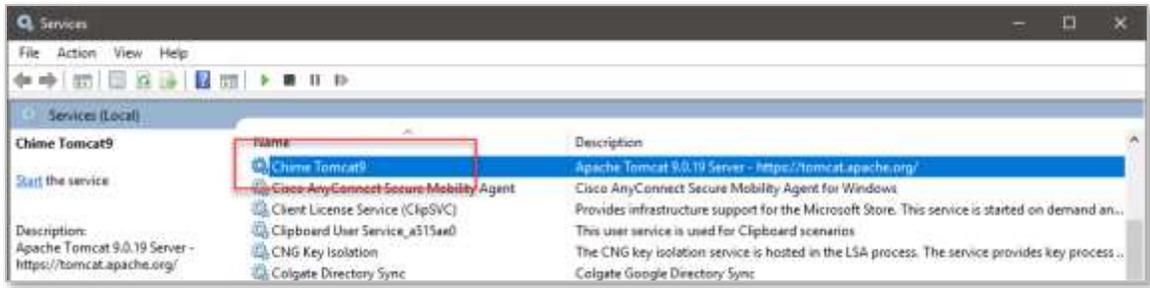


Figure 5: Services List

After specifying database settings Chime service can be started.

## CHIME DATABASE CONFIGURATION

Navigate to Chime install directory and run **ChimeConfiguration.bat**, this will launch configuration utility.

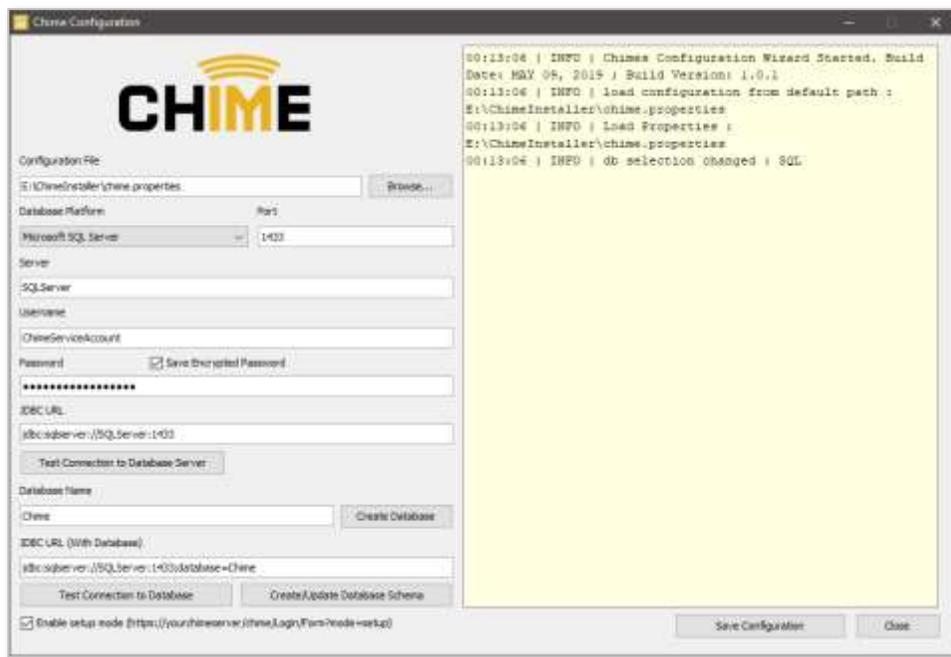


Figure 6: Chime Configuration Utility

Specify database connectivity settings, **test** database connection and next use the application to create Chime database and tables.

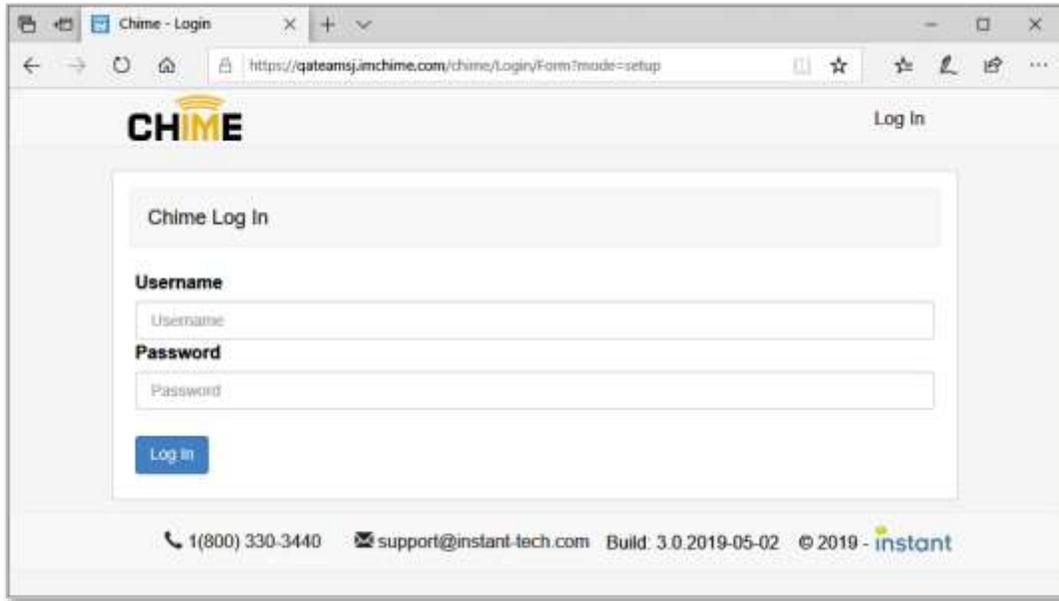
Use the option **Save Configuration** to save database connection details.

At this stage **Chime** service should be started.

## POST INSTALL CONFIGURATION

After Chime service has been started, access the setup URL:

<https://yourchimeserver/chime/Login/Form?mode=setup>



**Figure 7: Access Chime App**

Use the following credentials to sign-in:

Username: **admin**

Password: **admin**

**Important** After completing configuration you must [disable setup mode](#) to prevent unauthorized access.

After signing in navigate to **Admin -> Settings** section



## SPECIFY SLACK OAUTH SERVICE SETTINGS

Navigate to Settings -> OAUTH Service

**OAUTH Service**

Application ID: 583177988723.619158302982

Client Secret Key: .....

Tenant Domain: instant-tech.com

Tenant ID: SLACK

Test OAUTH Connection

In order to enable Slack OAUTH, Application ID, Secret and Tenant Domain values are required. Refer Chime prerequisites guide for setting up OAUTH registration.

## ADD USERS WITH ADMIN & EXPORT ROLE

Navigate to Admin -> Advisors section and add users using Slack Directory

**New Person**

First: First Name

Last: Last Name

Role: 

- Advisor
- Administrator**
- Advisor
- Manager
- Reviewer
- Exporter

Account Type: Testing

Platform Type: Slack

Max/day: 2000

Max concurrent: 2

Close Save

After a user with Admin rights has been added it is very important to verify that **Setup Mode** has been disabled.

## DISABLE SETUP MODE TO PREVENT UNAUTHORIZED ACCESS

After Admin settings have been specified, Chime instance will support OAuth flow for user authentication. At this point setup mode **must be disabled** to prevent unauthorized access. To disable setup mode:

1. Run Chime Configuration Utility
2. Uncheck the setting **Enable setup mode**
3. Save Configuration

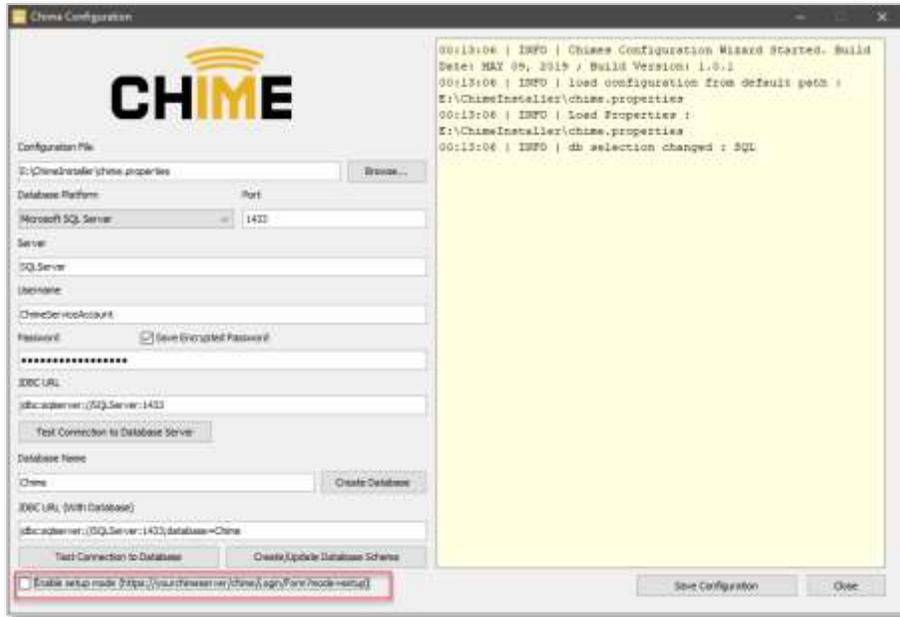


Figure 10: Chime Configuration Utility – Disable Setup

After saving settings **restart** Chime Tomcat service.