



## CHIME ON-BOARDING DOCUMENTATION

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### PRIOR TO APPLICATION INSTALLATION

- Review Chime architecture
- Discuss machine hosting requirements and Azure or on-premise configuration
- Provide information on how to add admins, managers, and agents (Doc and discussion)
- Overview of roles and UI related to admins, managers, and agents (Doc and discussion)
- Discuss any integration and virtual agent (ticketing) integration (review requirements and flow)
- Discuss requirements for creating dispatcher (Doc and discussion)

### MACHINE CONFIGURATION AND CHIME APPLICATION INSTALLATION

- Remote assistance with machine configuration
- Remote assistance with application installation
- Assist configuring SSL, database configuration, and access to 0365 tenant authorization
- Provide information on configuring and creating dispatcher bot framework end points
- Stand up Chime instance and provision administrator(s)
- Verify Chime is installed and configured

### CONFIGURATION AND TESTING

- Associate dispatcher with queue and verify access
- Add manager and agents to admin area
- Add managers and agents to single queue
- Configure any SMTP notification and server health monitoring
- Configure and simple theming for web client and test
- Associate external bot framework-based bot (add to admin area) and optionally attach to single queue
- Assist with MS Teams based UI 'pinning' and adding Chime to MS Teams tenant UI
- Provide optional default standard replies
- Provide sample interview

### POSSIBLE TRAINING

- 1-hour training sessions for admins, managers, agents
- Overview of reporting options for managers

### VIRTUAL AGENT INTEGRATION – OPTIONAL

- Provide base level virtual agent
- Customize virtual agent for simple field mapping and access credentials
- Assist with adding virtual agent to Chime server
- Attach virtual agent to single queue

One month follow up review (if required)

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