



CHIME FOR TEAMS CREATE AN INTERVIEW GUIDE

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OVERVIEW

This document will cover the new interview feature that has been added into Chime for Teams. The interview feature allows you to inbound chat requests into one queue endpoint and surface a set of adaptive cards to guests coming into Chime that help route them to the correct agent. This might work by routing them to a queue with their preferred language, assign them a routing tag, and pair them with a self service bot that can assist them and deflect their chat session if their problem is solved.

PREREQUISITES

Before creating an interview, you must have any of the actions listed above created. Initially you will need to have one queue set up on your Chime server that will be where you want the interview to start from. If you want to use any of the features listed below in the interview, you will need to set them up in Chime before creating the interview.

- Additional queues to route to
- Routing tags to be assigned to the guest
- Self service bots connected to Chime

CREATING AN INTERVIEW

To begin creating an interview you will first need to navigate to the settings area of the queue. To do this:

1. Click **My Manager Home** on the top nav bar, then select **Manage Queues**.
2. Click the **Queue Settings** button for the queue you would like to create the interview for.
3. Navigate to the **Interview** tab in Queue Settings.

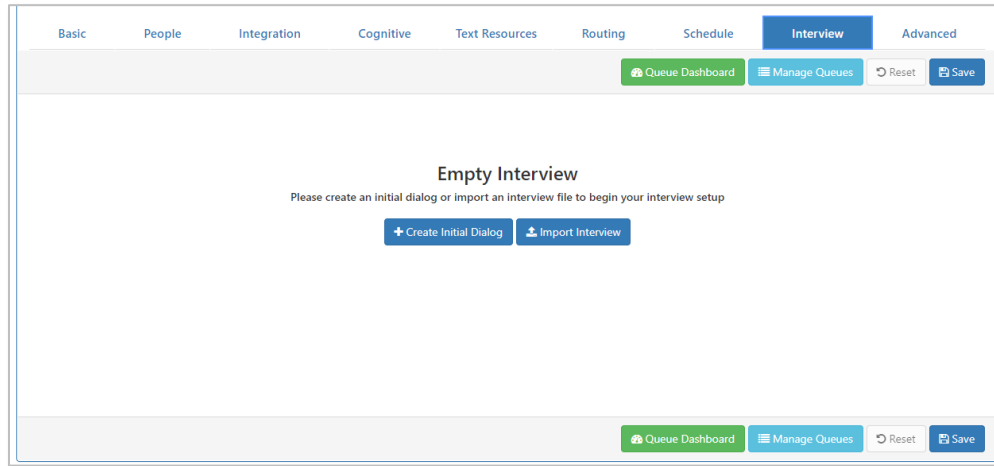


Figure 1: Empty Interview Page

4. Initially the interview will be empty and you have the option to either **Create Initial Dialog** or to **Import Interview** (this option will be covered later)
5. Click **Create Initial Dialog**
6. Enter the name for your initial interview dialog

SETTING UP THE DIALOG

1. On the left, select the dialog you just named as the **Initial Dialog**

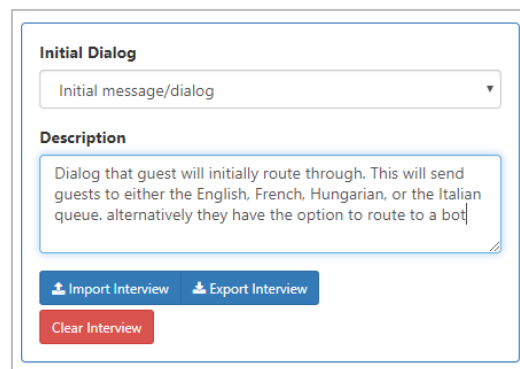


Figure 2: Initial Dialog and Description

2. Add a description of the dialog

3. Click on the dialog to get customization options

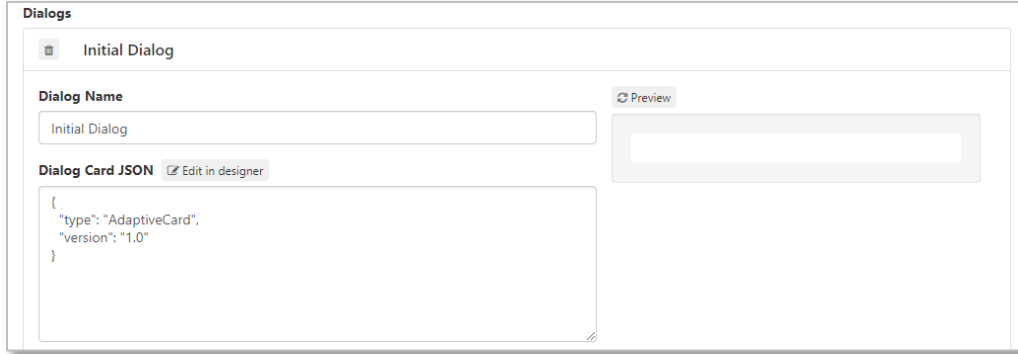


Figure 3: Empty Dialog Editor

4. If you have the JSON you wish to use for the adaptive card, add it into the text editor, otherwise, use the **Edit in Designer** option to customize the card.
5. In the designer, to create the simplest greetings message, drag the TextBlock element into the empty adaptive card

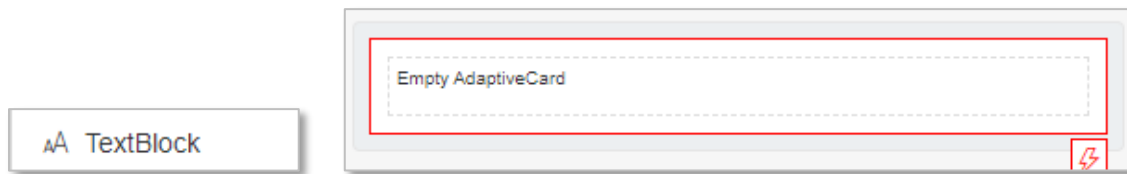


Figure 4: Adaptive Card Designer - Text Element

6. Then, enter the greeting text that you want.

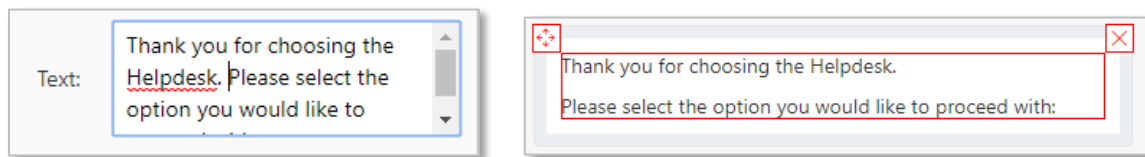


Figure 5: Adaptive Card Designer – Text Field

7. Click Save Card. This will autofill the JSON into adaptive card dialog

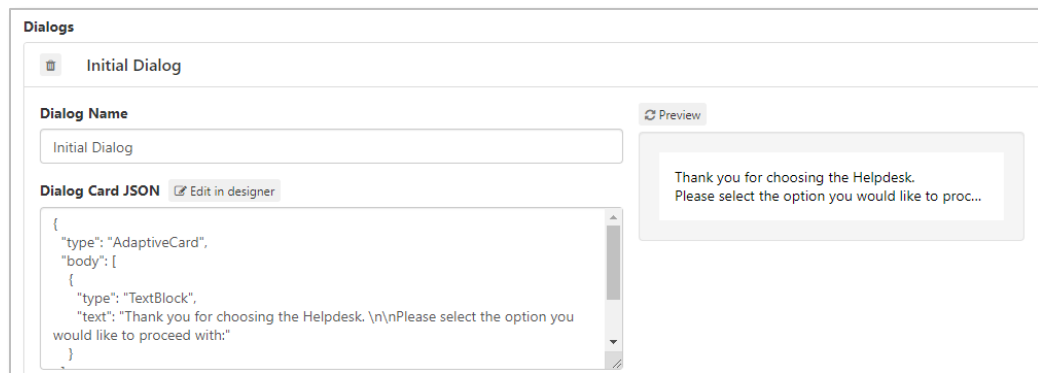


Figure 6: Filled Dialog JSON

INTERVIEW CHOICES

After the initial dialog's message is created, you are able to set up the choices they can pick from.

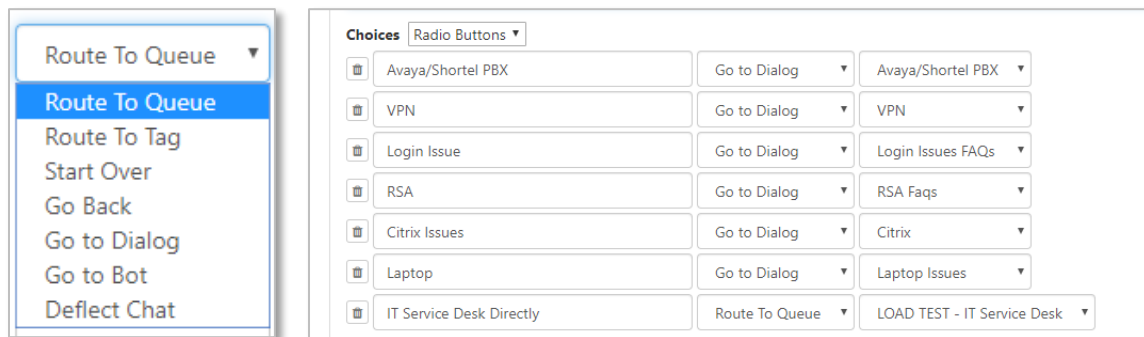


Figure 7: Empty Dialog Editor

You can choose to display these options as either ratio buttons, a combo box, or as a list of buttons. Each choice needs a name. This name is what the guest will see for the option. Additionally, you must choose an action to go with the choice once they submit the card. If you would like additional choices, click the **Add New Choice** button to add another choice to customize.

INTERVIEW ACTIONS

When creating an interview you have a number of different actions you can perform in the interview. Here is a list of what each option does.



Choice Name	Action	Choice Name
Avaya/Shortel PBX	Go to Dialog	Avaya/Shortel PBX
VPN	Go to Dialog	VPN
Login Issue	Go to Dialog	Login Issues FAQs
RSA	Go to Dialog	RSA Faqs
Citrix Issues	Go to Dialog	Citrix
Laptop	Go to Dialog	Laptop Issues
IT Service Desk Directly	Route To Queue	LOAD TEST - IT Service Desk

Figure 8: Select Dialog Actions

ROUTE TO QUEUE

Allows you choose to route the guest to a different queue. Typically used to route the guest to a different language queue.

ROUTE TO TAG

Assigns the chosen routing tag to the guest and then routes them into the queue to be picked up by an agent with the matching skill tag.

START OVER

Sends the Guest back to the very start of the interview chain. Typically used from a second or third level dialog option

GO BACK

Returns the Guest to the dialog they were previously on. To use this option you must have already created an additional dialog by using the **Add New Dialog** button

GO TO DIALOG

This moves the guest to a specific dialog. This can send to a dialog farther down the tree or to one on the same level or higher up. To use this option you must have already created an additional dialog by using the **Add New Dialog** button

GO TO BOT

Sends the guest to a self service bot of your choice. The bot can then send the user back into the queue, or deflect the chat session on its own.

DEFLECT CHAT

Ends the chat session for the guest and moves the conversation into the deflected state. Used for situations where the interview is able to solve the issue for the guest.

INTERVIEW TREE PREVIEW

In the Interview - Settings area, there is an option to **View Interview Tree**. If you click this button you will see a visualization of the interview from the initial dialog down to the sub-dialogs and the different outcomes for each interview path. To return to the Interview – Settings click the **Settings** button.

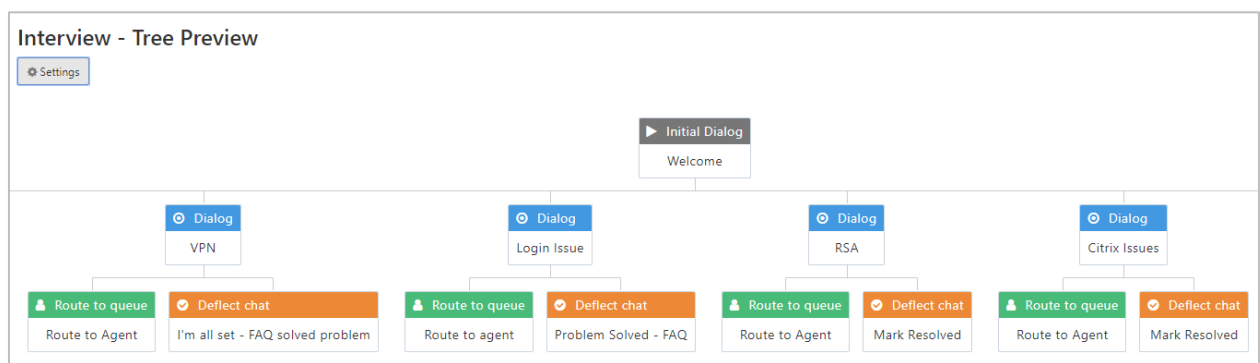


Figure 9: Interview Tree

IMPORTING AND EXPORTING AN INTERVIEW

On the left side of the Settings page there are three options below the Initial Dialog and Description settings. Import Interview, Export Interview, and Clear Interview

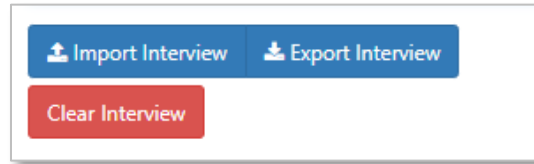


Figure 10: Import Export Clear Buttons

EXPORT INTERVIEW

Allows you to create a JSON file containing all of the data needed to build the interview on another queue, or on a different server. Often times we will create interviews and export them for customers for example.

IMPORT INTERVIEW

This opens a file explorer where you can choose to import a previously exported interview and add it to the queue. Very useful if you want to reuse interviews on multiple queues or to make slight changes like text resource language etc...

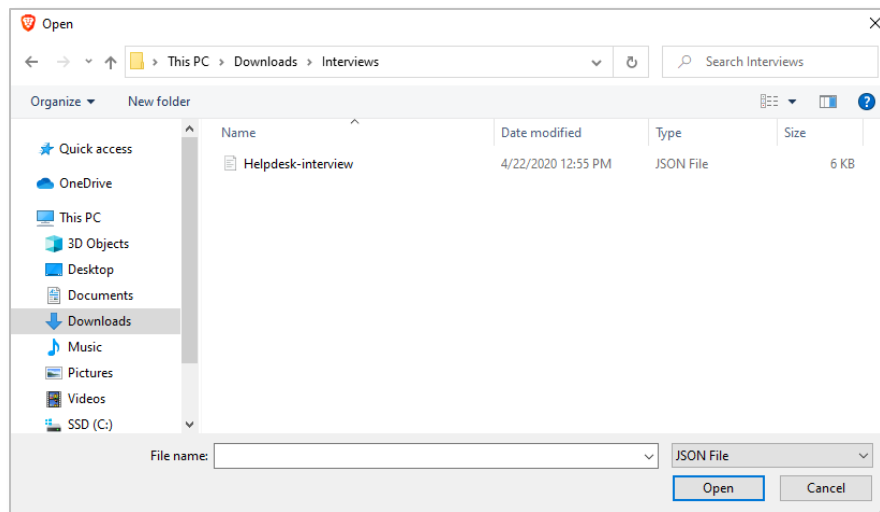


Figure 11: Import Interview JSON

CLEAR INTERVIEW

Clears all of the data for the dialogs and resets back to the empty interview.

INTERVIEW EXAMPLES

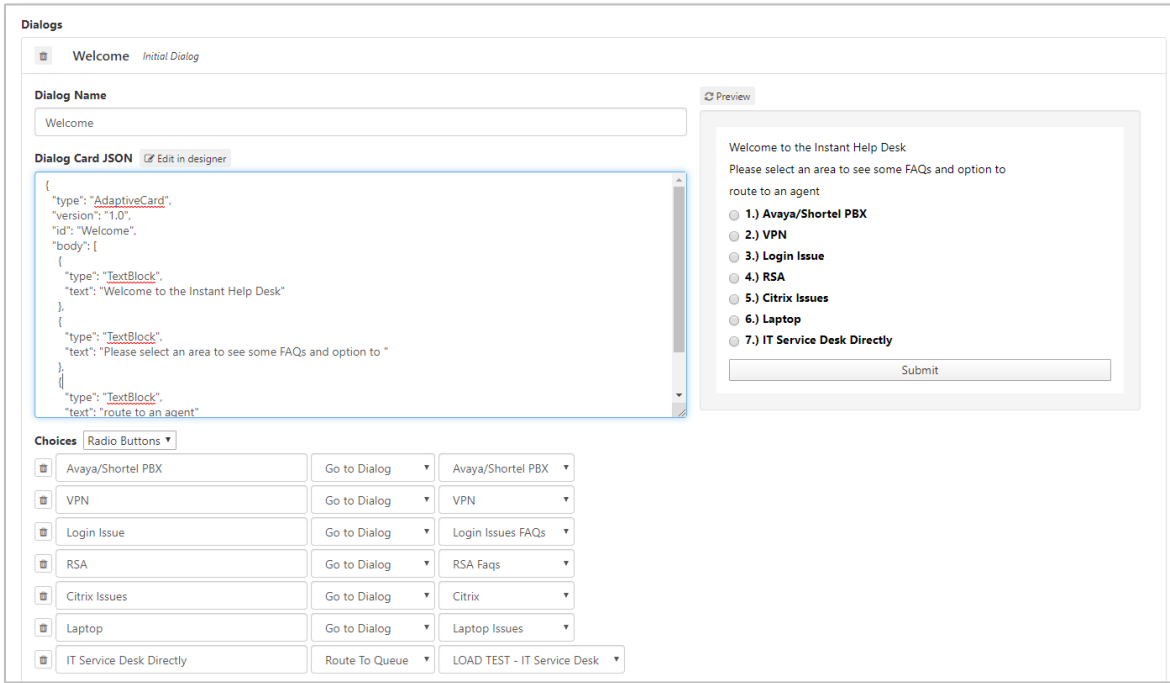


Figure 12: Multi-Level Interview

Multi-level interview that covers multiple problem types and is able to either resolve the issue or route the guest to various different queues.

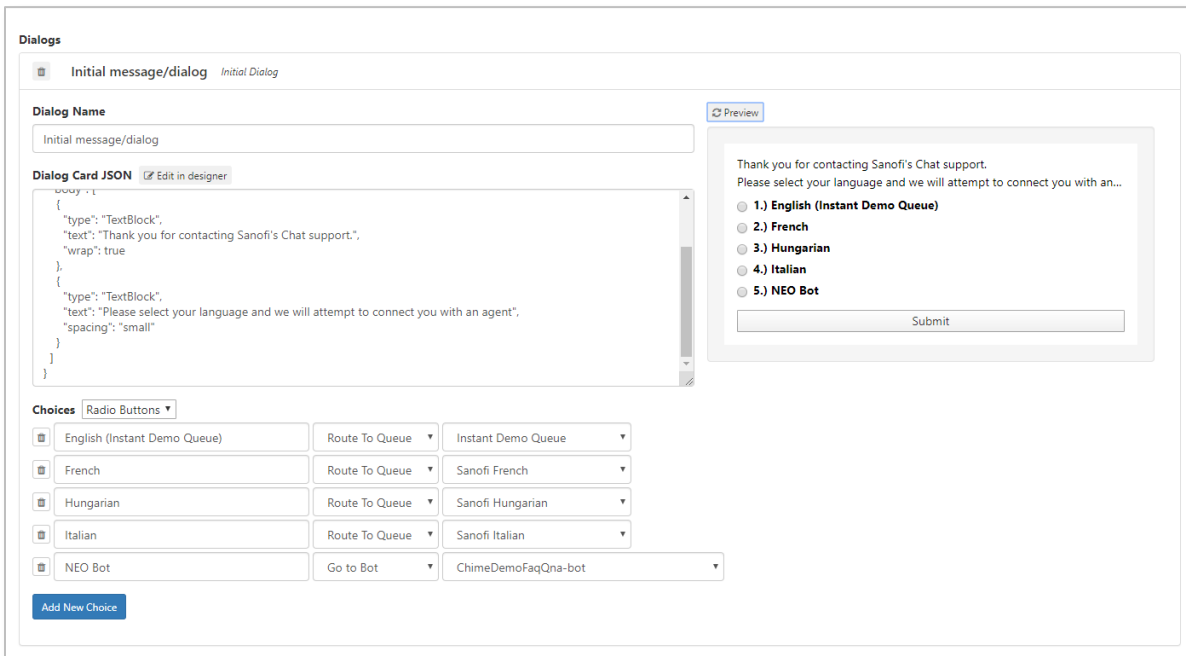


Figure 13: Navigate to Language Queue Interview

Interview that allows the guest to either choose the language they want or to use a self service bot