instant

CHIME

USER GUIDE

Summer 2015

Copyright and Disclaimer

This document, as well as the software described in it, is furnished under license of the Instant Technologies Software Evaluation Agreement and may be used or copied only in accordance with the terms of such license. The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Instant Technologies. Instant Technologies assumes no responsibility or liability for any errors or inaccuracies that may appear in this document. All information in this document is confidential and proprietary.

Except as permitted by the Software Evaluation Agreement, no part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Instant Technologies .

Copyright © 2005 - 2015 Instant Technologies, All rights reserved.

Trademarks

All other trademarks are the property of their respective owners.

Contact Information

See our Web site for Customer Support information.

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

CONTENTS

CHIME USER GUIDE

INTRODUCTION

Chime is intended to provide a platform to provide additional channels to a new, or existing, service desk. Typically, this involves providing the ability to provide an IM based access point to a collection of agents representing a service desk.   This might involve IM enabling a service desk related to IT support requests, HR requests, or internal sales support.

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, IBM DB2, IBM Sametime, and other common platforms.

In an enterprise 'click to chat' deployment, Chime provides a platform to associate agents with a service desk queue, associate an IM dispatching layer with the service desk, and automatically provides a set of dashboards, and reports, to create, monitor, and measure all activity.

This document will provide an overview of the various modules within the Chime platform and describe how to initialize and configure the Chime environment.

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

At a high level, Chime is designed to connect people looking for assistance with an agent who can immediately provide assistance. Chime utilizes the existing IM (some call is UC) infrastructure deployed within an enterprise to help broker and establish this connection. In Chime, agents are maintained as part of a 'queue'. Each queue has a set of properties that define how the queue will 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)
- 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

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 some credentials to access the site. Enter the correct credentials to proceed.

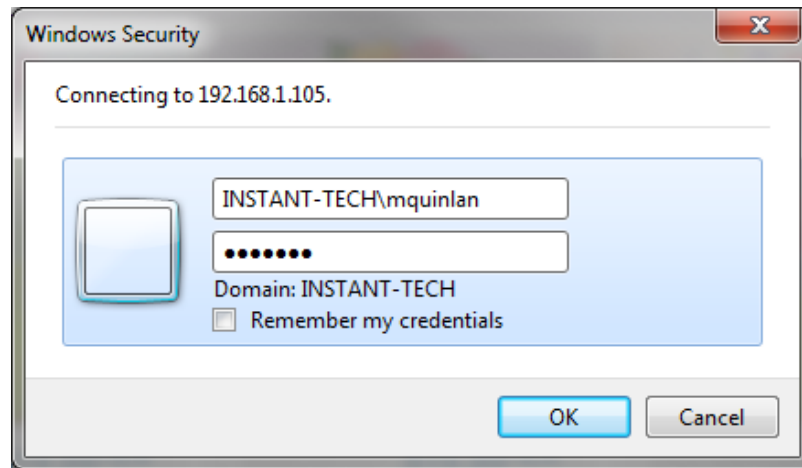If Chime is deployed against Microsoft Lync, then you will be prompted for your Windows credentials:

Figure 1: Windows Authenticated Login

To configure a queue, you will need to do three things:

1. Add people into the Admin section who will eventually receive chats from the queue
2. Create a dispatcher that will broker all conversations
3. Add agents, or groups, into the new queue

To start configuring queues, go to the Admin section at the top of the page.
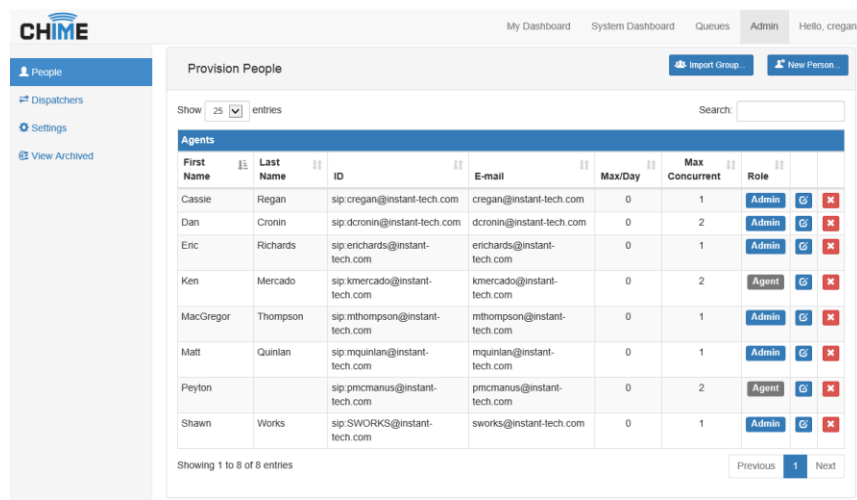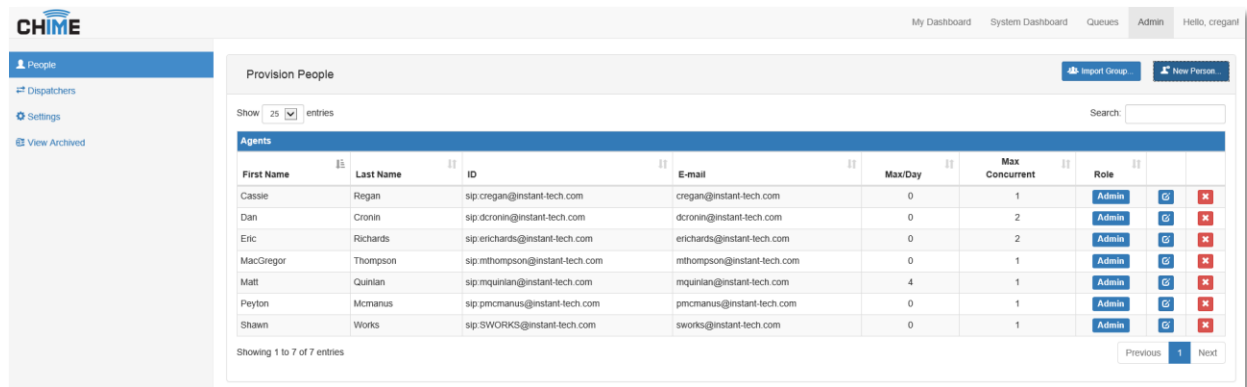
Figure 2: First look at Chime

ADMIN

The Admin area has four main categories: *People*, *Dispatchers*, *Settings*, and *View Archived*. Only users who are defined as administrators will be able to access this portion of the application.

PEOPLE SECTION

This section is where people (agents), are provisioned. Adding a person here imports them to the Chime directory so they can then be added into a queue. Once added to a queue, they will be able to receive incoming chat requests. This is where you'll set global properties associated with each user. Admin rights are also configured in this section.

Figure 3: People Grid

ADDING A PERSON

To add a new person to the Chime directory, click the **New Person** button above the grid.
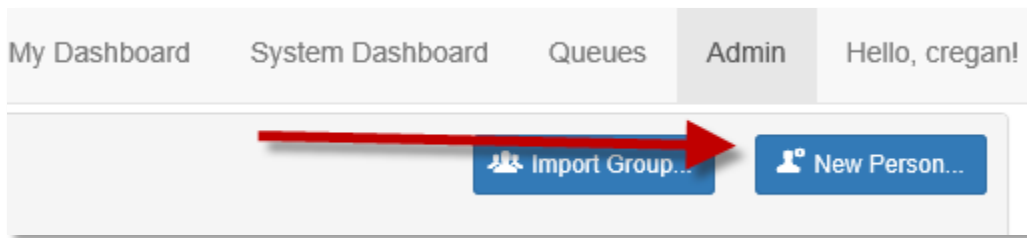
Figure 4: Adding a new person

The **New Person** button should bring up the New Person configuration window.

Figure 5: Chime person settings

Using this form, you can enter all the fields manually or you can click the **Directory** button to search your directory service for a specific user.

In the directory picker, enter a name to search for and press the **Search** button. Chime will search your directory, and return possible matches. To add the user's information to the New Person form, click on the person icon to the right of the user's information in the grid.

This will populate the appropriate fields with any of the information available from the directory.

First: The person's first name

Last: The person's last name

Administrator: Provides user Administration rights to Chime. This is a global setting. People can be given rights to manage queues in Queue Settings

SIP: The SIP address for the user

Email: An email address for the user (optional)

Account Type: Specifies whether the account is used for Testing, Development, or Production

Platform Type: What chat platform the user is provisioned for

Max/day: Maximum number of chats a user can handle for one day. 0 allows unlimited chats.

Max concurrent: Specifies the maximum number of concurrent chats a person can handle. (Cannot exceed Max/day)

Agent Skill Tags: Specific skill tags can be attached to each agent. An agent must first be added to the People section before acquiring any skill tags.
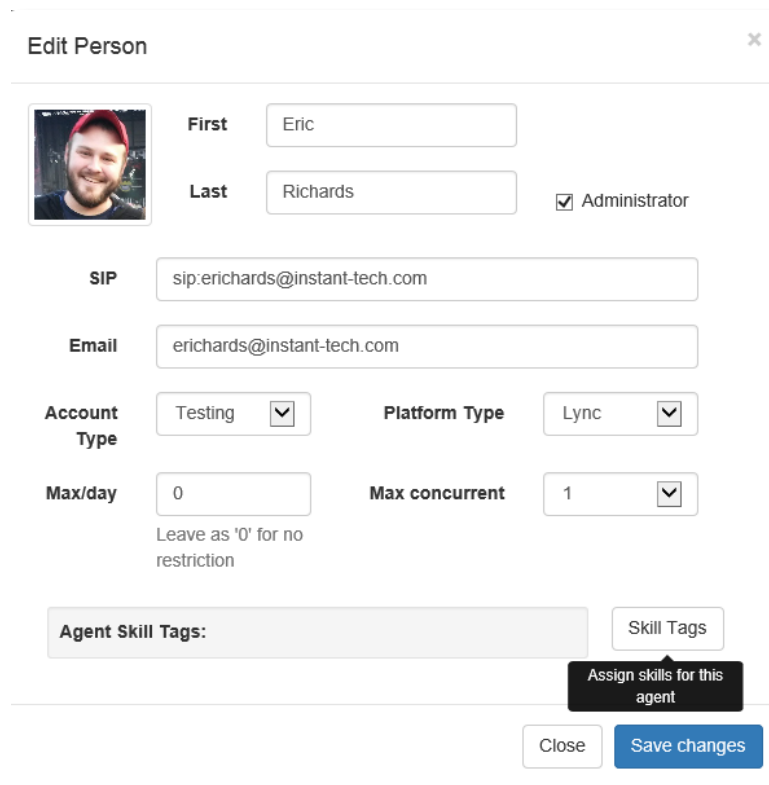
Once all the settings are configured click **Save changes**, and the user will instantly be provisioned within Chime.

EDITING A PERSON

To edit an existing person's settings, click the icon associated with that user in the people grid. This will open a window with the same fields as the New Person window, but will allow you to edit an existing entry. Make any desired changes, and click **Save changes** to update the person.

ADDING SKILL TAGS

Click on the button to add skill tags to a specific agent. Then, click on the **Skill Tags** button. **Select** a skill tag from the drop-down menu. Click on the + button to add it to the agent. The selected skill tags will now be displayed in the 'Agent Skill Tags' Section.

Figure 7: Skill tags

Figure 8: Selecting Skill Tags

Figure 9: Agent's Skill Tags

DELETING A PERSON

If you need to remove a person from Chime, click the icon in the people grid. This will bring up a confirmation window, where you can confirm the removal or cancel. The removal will set the user as archived, and you can restore a person at a later point if you need to.

DISPATCHERS

A dispatcher is a Lync-enabled account that is used to broker chats within Chime. The dispatcher needs a Lync-enabled account that is previously configured with your chat system. It is recommended that you create a user with a name that correlates with the queue you will create.

ADDING A DISPATCHER

To add a new dispatcher to Chime, click the **New Dispatcher** button below the grid.

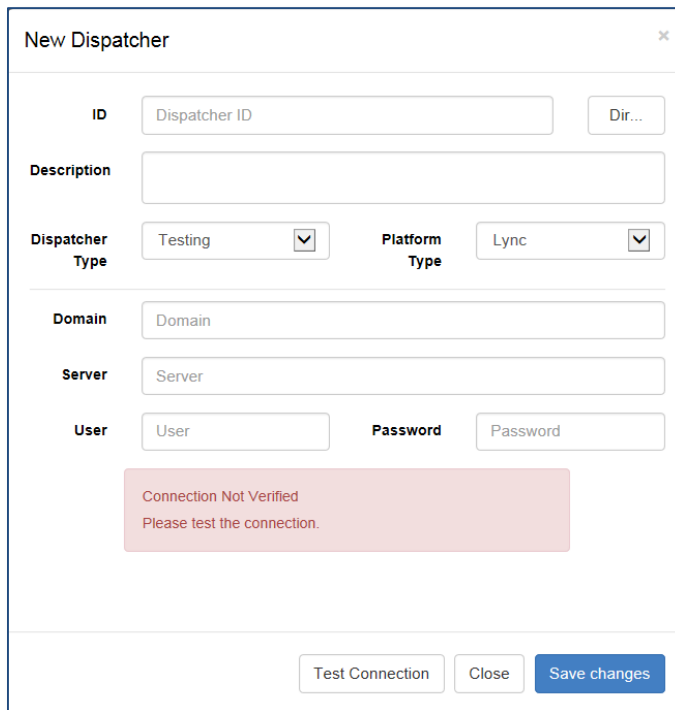This should bring up the New Dispatcher window.

Figure 10: Chime dispatcher settings

ID: The SIP address for the dispatcher

Note: All dispatcher accounts must be lync-enabled to work with Chime

Description (optional)**:** Additional information about the dispatcher

Dispatcher Type: Specifies whether the dispatcher is used for Testing, Development, or Production

Platform Type: What chat platform the dispatcher is provisioned for

Domain: Domain that the account is provisioned in

Server: Address of the chat server (Lync/Sametime) that Chime will log in to.

User: Full username of the account being used for the dispatcher

Password: Password to use when logging into the chat server

Before a dispatcher can be used, Chime must verify that it can log in as the user. To do this, click **Test Connection** and Chime will verify the settings provided.

Once the connection has been verified click **Save changes** to add the dispatcher to Chime.

EDITING A DISPATCHER

To edit a dispatcher's settings click the icon in the dispatcher grid. This will open a window with the same fields as the New Dispatcher window, but will allow you to edit an existing dispatcher. Make any desired changes, and click **Save changes** to update the dispatcher.

DELETING A DISPATCHER

If you need to remove a dispatcher from Chime, click the [×] icon in the dispatcher grid. This will bring up a confirmation window, where you can confirm the removal or cancel. The removal will set the dispatcher as archived, and you can restore a dispatcher at a later point if you need to.

SETTINGS

The settings section is where you will configure system settings such as server settings, license keys, default text resources, and language options.

SERVER SETTINGS

Directory Service – This section includes the Server Name and Directory Service user. These fields should be pre-filled and they should not be configurable by any user.

Database Settings – These fields should be pre-filled and they should not be configurable by any user.

Email Settings:

- **Send Email Alerts on Critical Failures:** Checking this box will alert all Chime administrators when a queue fails to start, or a license key has expired, causing a queue to go offline.
- **Include support@instant-tech.com:** Checking this box will send the Critical Failure notifications in the setting above to the Instant Tech support team.
- **SMTP Server Address:** Enter SMTP server address, if using an SMTP server.
- **SMTP Server Port:** Enter SMTP server port, if using an SMTP server.
- **SMTP Username + Password:** Enter the SMTP username and password into the appropriate fields, if using an SMTP server.
- **Use SSL?:** Check this option if you require SSL for security purposes.

LICENSE SETTINGS

If you are using a trial version of Chime, you do not need to manually add a license key. Your trial provides you with a license for one queue and three agents.

If you have received a specific license key for Chime, paste the code into the "License Code" field and click Add Licenses. Once those license keys have been added, you can apply them to queues in queue settings.

Figure 11: License Settings

TEXT SETTINGS

This area is where you will configure default text resources to apply those at a global level, if necessary. If you want to edit text resources at a queue level, go to Queue Settings.

A default text resource has been provided for you, but if you wish to add a new set, click on the 'New Text' button. Fill out all required fields to customize text resources. For more information on how to configure text resources, please refer to:

Text Resources

SKILL TAGS

This section is where skill tags are added at an administrator level. Once skill tags are defined in this section, they can be attached to specific agents in the People section. Chime provides five skill tag examples by default: Password Reset, VPN, Software Request, Hardware Request, and Other. To add more skill tags, type in the name of the skill tag, and click on the + button
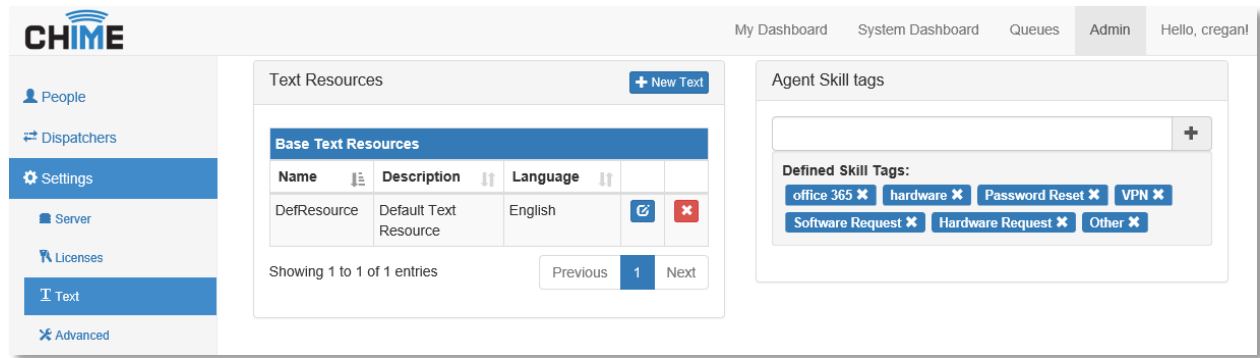

Figure 12: Skill Tags

ADVANCED SETTINGS

Languages: The language section gives you the option to add a new language label. To add a new language label, type in the name of the language in the 'New Language' field. Click Add Language. Note: This does not provide the ability to translate chat text. It is simply a label for the queue.

Web Client: This section allows you to restart the web client. You may need to restart the web client if it goes offline, or if there are other issues that a simple restart will address. To restart, click the 'Restart Web Client' button. You should receive a notification that the restart was successful.

ChimeHub: ChimeHub allows you to stage click to chat links on external web pages so that customers and end users can initiate chats with the queue. In this section you can register with ChimeHub. To configure ChimeHub, fill out the following fields:

- **ChimeHub Root URL:** Enter the URL for ChimeHub
- **Engine ID:** Enter an identifier for the ChimeHub instance

1. Click on **Check Engine ID** to check whether the ID you requested is available. Pick another ID if the one entered is not available.

2. Click on **Request Activation.** You can start using ChimeHub once the request has been approved.

VIEW ARCHIVED

This section is where archived Queues, Chime users, and Dispatchers are listed. To restore an archived Queue, an archived person, or an archived Dispatcher, click on the restore button on the right side of the grid.

QUEUES

The Queues page is where you can add, edit, and remove queues within Chime. When you open the 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

Mode: Identifies the queue as being used for Testing, Development, or Production

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 as the connecting point for chat sessions. Click **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>

New Queue

Name	Queue Name
Description	
Mode	▼	Language	▼
License	▼

Dispatcher

| Name | Description | Type | Platform |

Select Dispatcher ...

Close Save

</figure>

Figure 13: 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, up the click the Edit icon for the queue in the queue grid. This will open queue settings window.

Figure 14: Edit queue settings

BASIC SETTINGS

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

Figure 15: Basic Queue Settings

PEOPLE

The people settings page allows you to add people that can be contacted via the queue.

Figure 16: Queue People

You can add people to the queue by clicking on the **Add Person** 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 first 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 17: Selecting users from the picker

Within a queue, people have additional properties that are tied to that queue. You can set some of those properties from the people grid.

Tags: Skill tags that have been provisioned for agents in Admin will show up in the '**Tags**' section.

Priority: Priority is a setting that can be used with a 'route by priority' approach. The lower priority numbers will be contacted first, and it will escalate from 1 to 5.

Manager: Setting a person as a Manager allows that person to edit queue settings and view queue dashboards and reports.

R/O: The Read-only option allows a person to manage a queue but they will not have the rights to change queue settings. They will only be allowed to view dashboards and reports.

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

Figure 18: Queue People

TEXT RESOURCES

Text resources are customizable messages that Chime will use when connecting people via chat. In addition to being customizable, Chime provides system variables that can be used to provide live, up to date information within those text resources.

Figure 19: Queue Text Resources

Chime comes with default text specified for all of the text resources. There are three different sections of text resources: **Seeker Text, Expert Text, and System Text**.

- The **Seeker Text** is where you will find text resources that will be sent to the seekers when they encounter any activity within the queue.
- The **Agent Text** is what experts who are provisioned in the queue will see within chat sessions.
- The **System Text** section holds the text resources that the queue would send out automatically based on system activity.

Chime also gives you the ability to apply standard text resources to a queue. Instead of using the text resources that are provided, you can create your own in the Admin section. To do this, go into **Admin > Settings > Text**, and select the **New Text** button. This is where you will define your own text resources.

To use a standard resource in a queue, pick the desired standard text resource from the drop-down list, and click **Apply**. The appropriate text resources will be applied for all options. After editing any resources, you must click **Save** to apply the changes.
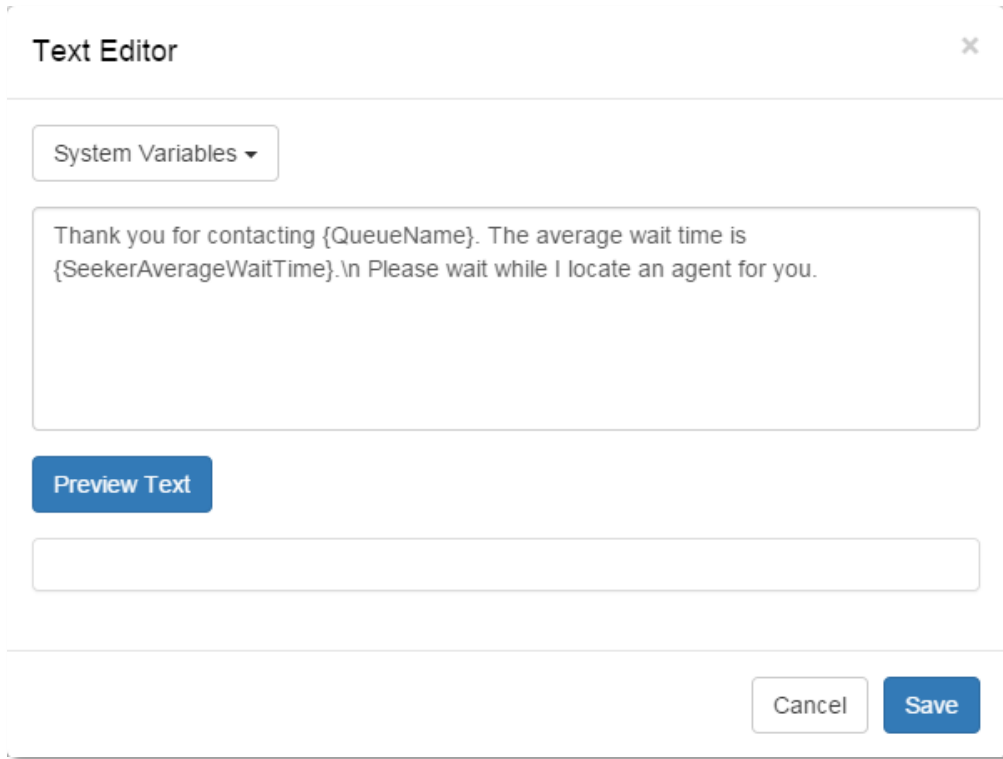

Figure 20: Apply Standard Text Resource

CUSTOMIZING A TEXT RESOURCE

The text resource editor provides you with a list of system variables you can use, and the ability to preview what the formatted text will look like once it is sent.

Figure 21: Customizing a Text Resource

1. Click the ☑ icon to edit a specific text resource. This will open the Text Editor modal.
2. Enter the text that you want to show for this specific text resource.
3. Click on the **System Variables** menu, if using any system variables.
4. Click **Preview Text** to show a preview of the text resource. The preview will also show an example of the system variables within the text resource.
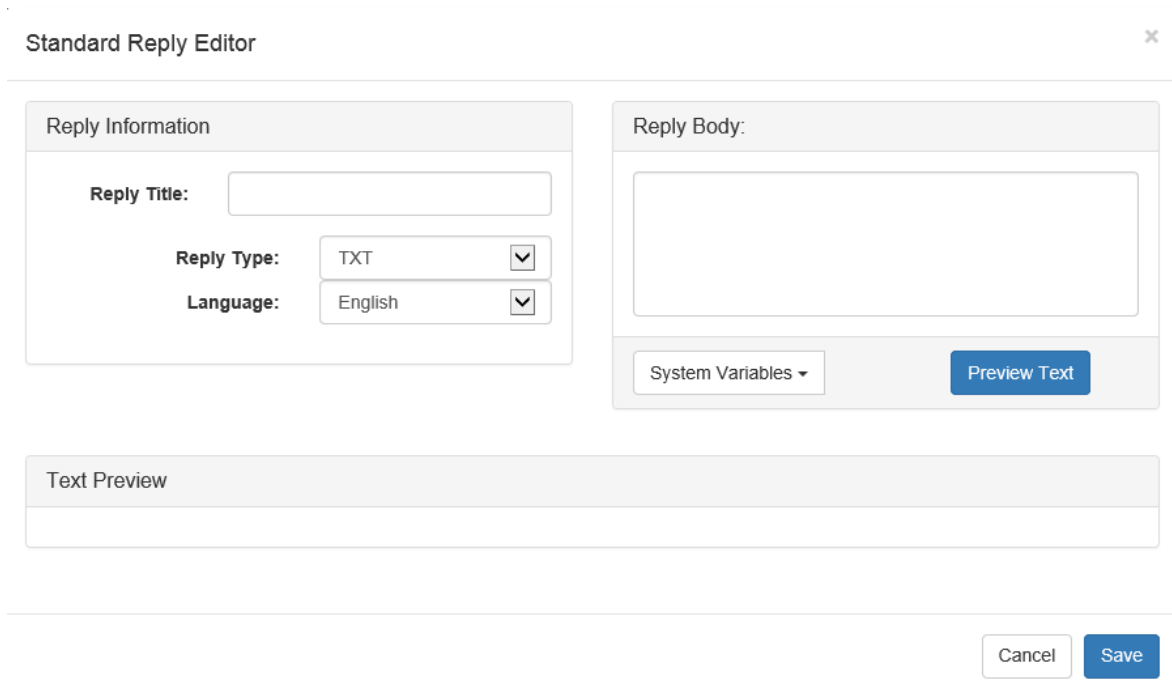5. Click **Save** once you are satisfied with the text resource.

STANDARD REPLIES

Chime allows you to configure standard replies, or canned replies, for agents to use within chats. You can create new standard replies as well as edit existing standard replies.

Click on the [icon] button to edit an existing standard reply.

CREATE A NEW STANDARD REPLY

1. Go to **Queue Settings** and click on the **Text Resources** tab.
2. Click on the **Standard Replies** tab
3. Click on the **New Standard Reply** button. This will bring up the Standard Reply editor.
4. Type in a **Reply Title** for the standard reply you want to create.
5. Choose a **Reply Type**:
   a. TXT – The standard reply will be simple text
   b. Video – The standard reply will include a video
   c. WebLink – The standard reply will include a link to a web page
6. Select a **Language** for the standard reply.
7. Type in a **Reply Body.** This is the actual standard reply that customers will see. Click on the **System Variables** menu and choose the variable that you wish to include, if desired.
8. Click **Preview Text** to show a preview of the new standard reply.
9. Click **Save** when you are finished creating the new standard reply.

Standard Reply Editor

Reply Information

Reply Title:

Reply Type: TXT

Language: English

Reply Body:

System Variables ▾   Preview Text

Text Preview

Cancel   Save

Figure 22: New Standard Reply

SESSION TAGS

Session tags allow you to attach certain keywords to specific chats. Session tags are created at a queue level and agents can use session tags within chats in the Agent Context Window.

ADD A NEW SESSION TAG

Follow these steps to add a new session tag:

1. Go to **Queue Settings**, then go to **Text Resources**, and click on the **Session Tags** tab within Text Resources.
2. Type in the name of the session tag you wish to create, and click on the + button. The session tag will immediately be added to the existing list of tags.

Figure 23: Session Tags

ROUTING

Routing settings allow you to specify timeout values and rollover queues.

Figure 24: Queue Routing Settings

Routing Method: The routing method is how the queue dispatches chat requests across agents in the queue. There are two routing methods: **Hunt** and **Skill Best Match Hunt**

Route by Priority: Selecting 'Yes' for Route by Priority will change the queue to route based on which priority agents have. If the queue is set to route by priority, then agents with a priority of 1 will get chats before those who are priority 2 and 3. Selecting 'No' for this option will change the queue to ignore the agent priority setting.

Accept Timeout: The amount of time an agent has to accept an incoming chat. If an agent does not accept a chat within this time frame, the chat will be routed to the next available agent.

Seeker Timeout: The amount of time someone is waiting in the queue will wait before being informed that a connection could not be made, or sent to a rollover queue.
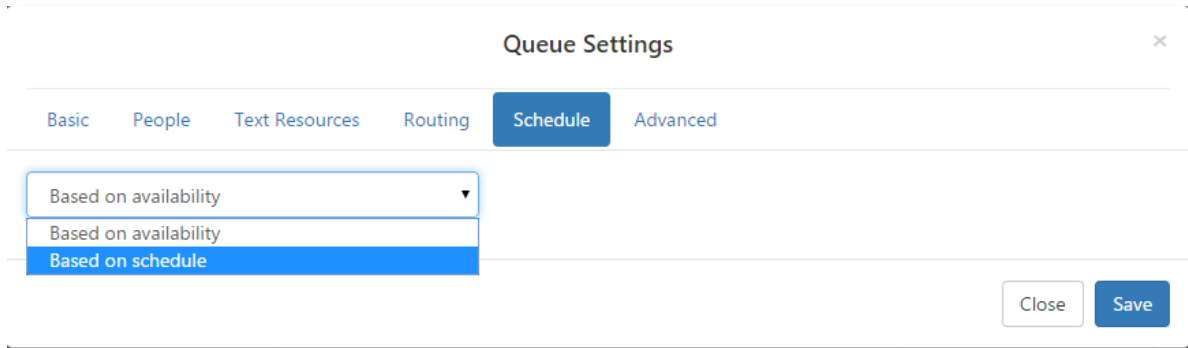
Seeker Update Interval: The frequency at which users will receive the message informing them that the queue is attempting to connect them with an agent.

Rollover Queue: This setting allows you to specify a queue for users to 'roll over' to another queue if the queue that was first contacted was unavailable.

SCHEDULE

Administrators and managers can set a specific schedule for each queue that will determine when the queue will be online and offline. Follow these steps to set a schedule for a queue:
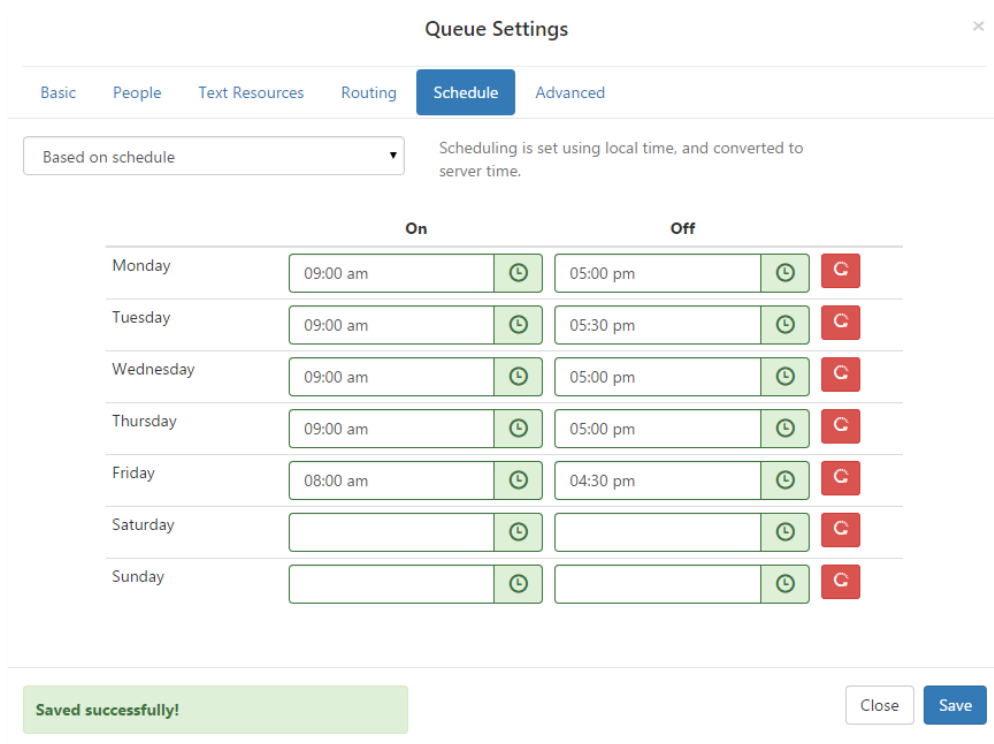
1. Go to Queue **Settings > Routing** to enable a queue schedule. Select the '**Based on Schedule**' option from the drop-down menu.

Figure 25: Queue Schedule

2. Click on the **clock icon** to pick a specific time for the queue to turn on. To set a schedule for the queue, you must **select an On and Off time** for each day. To turn the queue off for a specific day, leave the On and Off fields blank.

Figure 26: Queue Schedule

3. Click on the **blue arrows** to change the hour and minute fields. You can also click on the hour or minute numbers to bring up a menu of pre-defined numbers.

Figure 27: Queue Schedule – Choose time

Figure 28: Queue Schedule – Choose time

4. Click on the **AM/PM button** to switch from one to the other.

ADVANCED

The advanced settings section allows you to configure things such as queue target values and the Agent Context Window. Setting target values will allow these goals to be tracked within queue charts.

Queue Target Values are optional settings that allow managers or administrators to set goals for things such as Average Speed to Answer and Concurrent Chats.

- **Target ASA:** Entering a number in this field will set a target value for Average Speed to Answer metrics.
- **Target Chat Concurrency:** This will set a target value for chat concurrency or number of chats being handled at once.
- **Target Chat Duration:** This sets a target value for chat duration.

Enable Agent Context Window is an option for agents that allows a window to open within a chat that will show a web page. By entering a link in the URL section, you can configure what pops up within the window by entering an address for a specific website. **Note: Before the agent context window can work in Lync, you'll need to install a Lync registry key that can be found here:** www.addchime.com/downloads/agentCWE.zip

DELETING A QUEUE

To delete a queue, click the icon for that queue located on the right side of the queue grid.

QUEUE DASHBOARD

Click the icon in the queue grid to navigate to a Queue Dashboard page.

The Queue Dashboard will give you current information for that specific queue such as the number of experts that are online, the number of users that are connected, and average wait times for each queue. You will also find queue charts that have all chats recorded and are separated into different categories. These charts will be date selectable.

CHAT ROUTING

Once a queue has been created and agents have been provisioned, seekers can send out chat requests that will route to agents in the queue. Whether the request is sent from Lync or the Chime Web Client, the Chime engine will look for agents who are available, and based on routing and priority settings, will notify the appropriate agent that there is an incoming request. The notified agent can accept or decline. If the agent declines, the chat will be routed to the next appropriate agent. If the queue is unavailable or disabled, seekers will receive a message notifying them that no agents are available.

Chime has the ability to route chats two different ways:

1. Start a chat using Lync
2. Start a chat using the Chime Web client
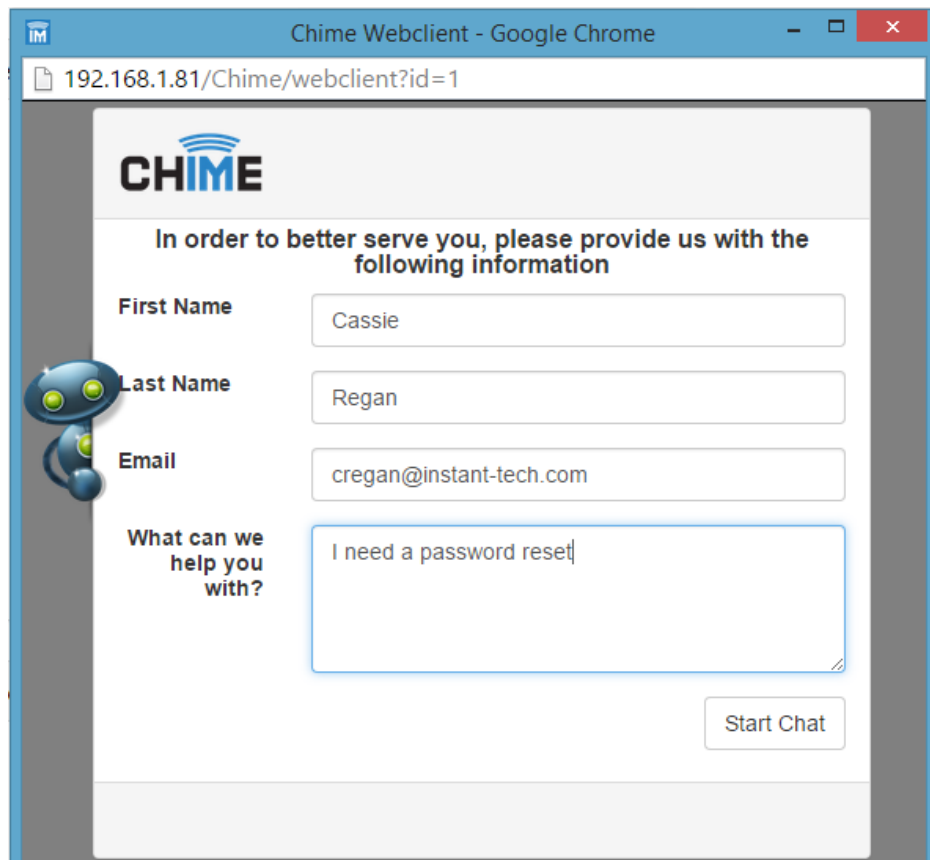
STARTING A CHAT WITH A QUEUE

LYNC

To send a message using a Lync client, a user must add the dispatcher account to their Lync client. If the dispatcher account is online, then there are agents available and a chat request can be sent out by simply sending a message to the dispatcher. The dispatcher will then notify the user that an agent is being located.

WEB CLIENT

To start a message using the Chime Web Client, a user simply needs to click on the "Launch Web Client" button that is located on each queue dashboard. This link can be staged in any number of locations. When the chat client starts, users will be prompted to fill out their name, e-mail, and question. Then, the web client will attempt to route the chat to an agent who is available in the queue.

Here is an example of what the Chime Web Client will look like:

Figure 29: Chime Web Client

ACCEPTING A CHAT

People who have been added into one queue or multiple queues will be able to accept chat requests from those queues and will be connected with people who send out requests to the queue. When a seeker sends out a chat request and an expert is available to accept it, that expert will receive a prompt informing them that a request has come in, and they will have the option to accept or decline the request.

ACCEPTING A CHAT REQUEST

For an incoming request in Lync, the dispatcher will contact one of the provisioned experts, and wait for a set amount of time for a response. If the person responds by sending 'y' as a message back to the dispatcher, Chime will connect the person with the seeker by creating a multiparty conference. The dispatcher will sit in the conference to monitor and handle the conversation, and the seeker and agent will chat directly. Users will also have all the capabilities of the Lync client available to them during the conversation.

CONCURRENT CHATS

Agents can receive multiple chats at once. The concurrent chat property is defined at an admin level, and the maximum number of concurrent chats an agent can have is five. Once an agent's maximum concurrent chat number is reached, they will no longer receive any chats until they close out of one or more of their existing concurrent chats. For example, if an agent's concurrent chat setting is two, and they accept two chats, any additional chats will be routed to other agents who have not fulfilled their maximum concurrent or max per day number.

TRANSFERRING A CHAT

Chime for Lync allows agents to transfer chat requests to other agents. If an agent is in a chat with a customer and they need assistance from another agent, they have the ability to invite an agent into the existing chat and then close out of the chat if they need to.

THE AGENT CONTEXT WINDOW

The Agent Context Window, or Client Window Extension (CWE), is an extension to the Lync chat window that when enabled, will pop out an additional window for agents using Chime. The context window has the ability to open up any web page, but by default it will open up a link to a page with information about the seeker and the chat session.

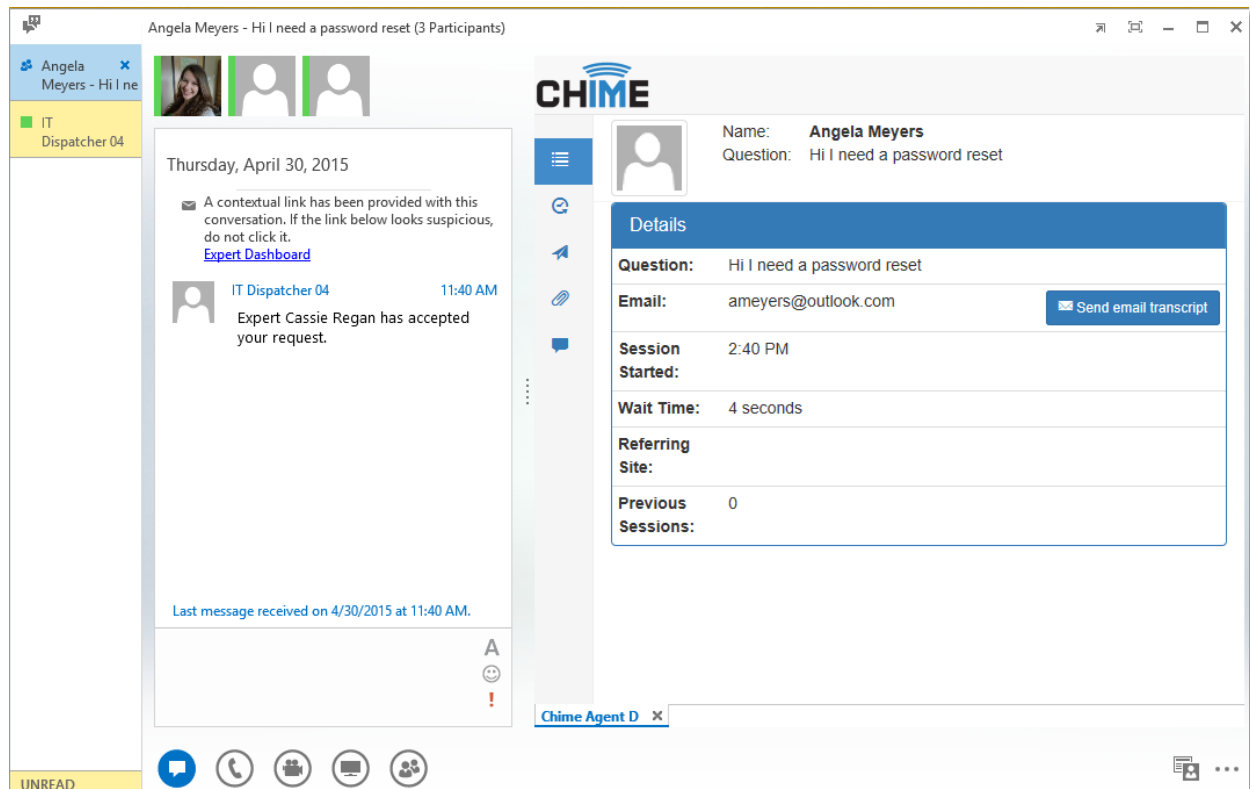Here is an example of the agent context window:

Figure 30: Agent Context Window

RESOLVED/UNRESOLVED

Agents have the ability to mark a chat session as resolved or unresolved using the agent context window. To mark a session as resolved, go to the 'Comments & Tags' tab in the context window. This is the tab on the bottom. Click on the Unresolved button to change it to Resolved. The session will now be marked as resolved.
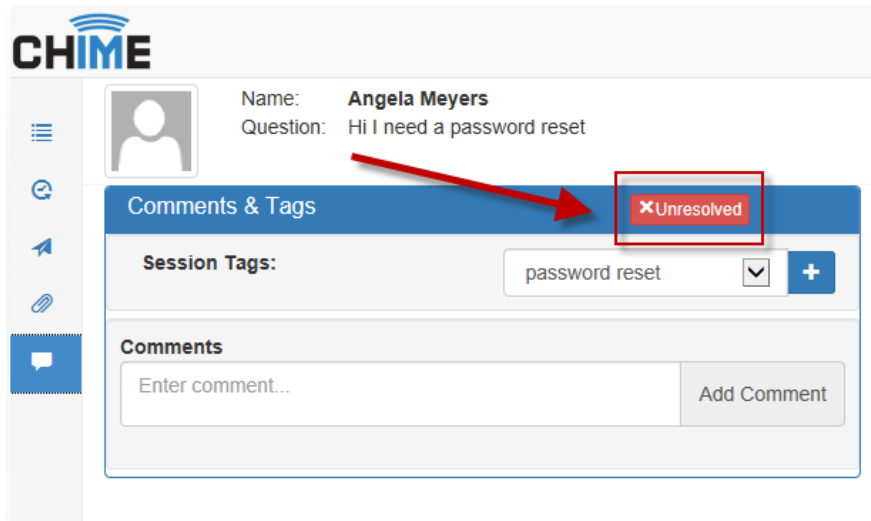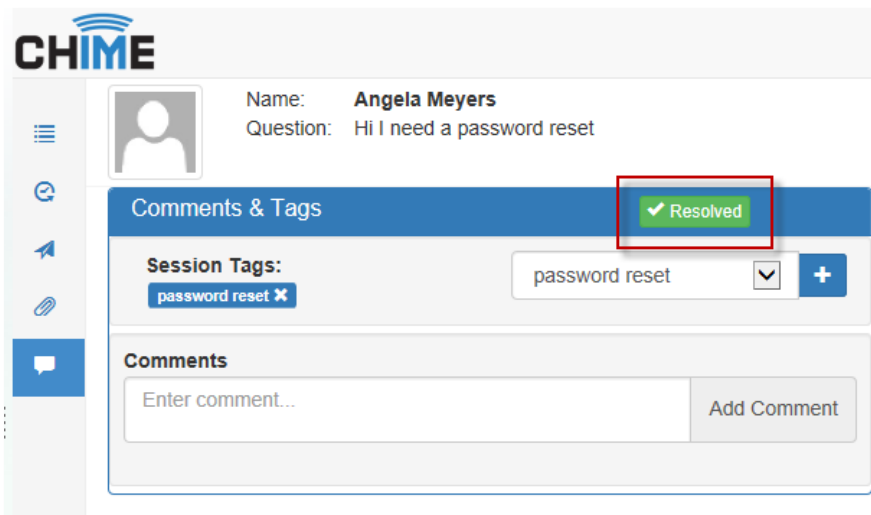

Figure 31: Unresolved Chat Session

Figure 32: Resolved Chat Session