

 instant


CHIME

USER GUIDE

Summer 2015

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CONTENTS

Introduction.....	4
Overview	4
Accessing the Application	5
Admin	6
People Section	6
Adding a person.....	7
Editing a person	9
Deleting a person.....	10
Dispatchers.....	11
Adding a dispatcher	11
Editing a dispatcher	11
Deleting a dispatcher	12
Settings.....	12
Server Settings	12
License Settings.....	13
Text Settings	13
Advanced Settings	14
View Archived	14
Queues.....	15
Adding a Queue.....	15
Editing a Queue.....	16
Basic Settings	17
People.....	18
Text Resources.....	20
Standard Replies	23
Session Tags	24
Routing.....	25

Schedule	26
Advanced	28
Deleting a Queue.....	28
Queue Dashboard	28
Chat Routing	29
Starting a Chat with a Queue	29
Lync.....	29
Web Client	30
Accepting a Chat	31
Accepting a Chat Request	31
Concurrent Chats	31
Transferring a Chat	31
The Agent Context Window	32

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 it 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:

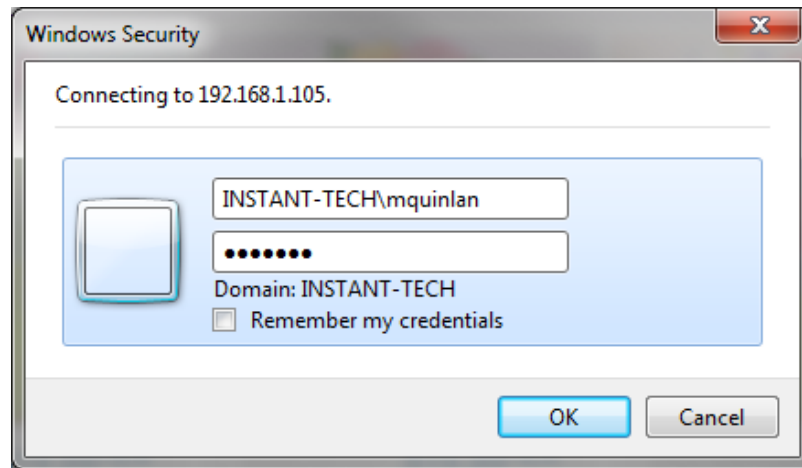


Figure 1: Windows Authenticated Login

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.

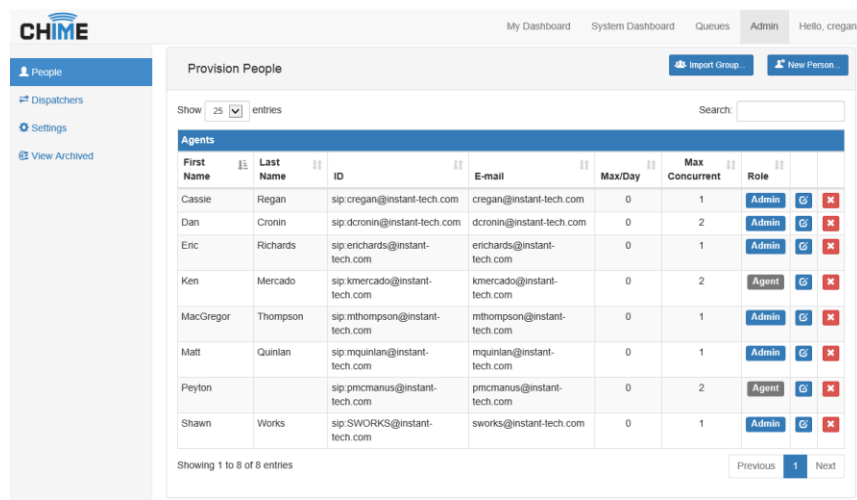


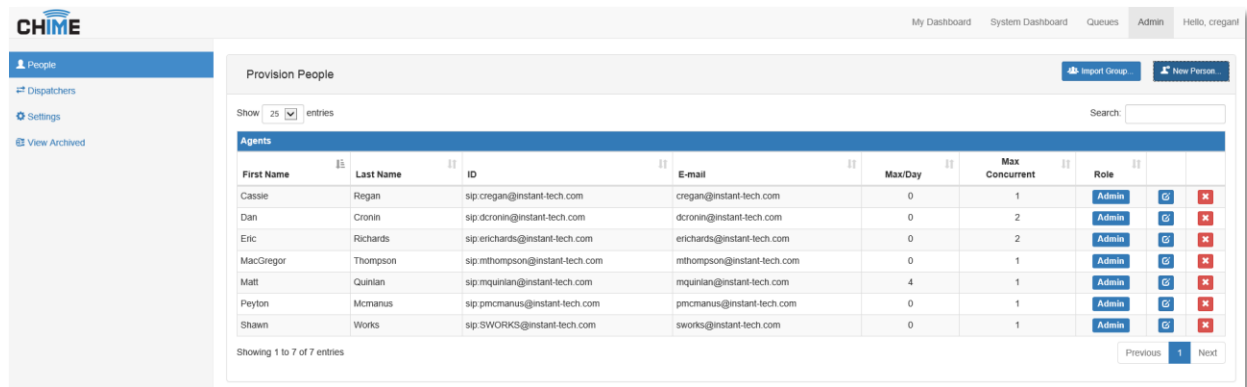
Figure 2: First look at Chime

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.



CHIME

My Dashboard System Dashboard Queues Admin Hello, cregan

People

Dispatchers

Settings

View Archived

Provision People

Import Group New Person

Show 25 entries

Search:

First Name	Last Name	ID	E-mail	Max/Day	Max Concurrent	Role		
Cassie	Regan	sip.cregan@instant-tech.com	cregan@instant-tech.com	0	1	Admin		
Dan	Cronin	sip.dcronin@instant-tech.com	dcronin@instant-tech.com	0	2	Admin		
Eric	Richards	sip.erichards@instant-tech.com	erichards@instant-tech.com	0	2	Admin		
MacGregor	Thompson	sip.mthompson@instant-tech.com	mthompson@instant-tech.com	0	1	Admin		
Matt	Quinlan	sip.mquinlan@instant-tech.com	mquinlan@instant-tech.com	4	1	Admin		
Peyton	Mcmanus	sip.pmcmanus@instant-tech.com	pmcmanus@instant-tech.com	0	1	Admin		
Shawn	Works	sip.SWORKS@instant-tech.com	sworks@instant-tech.com	0	1	Admin		

Showing 1 to 7 of 7 entries

Previous 1 Next

Figure 3: People Grid

ADDING A PERSON

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

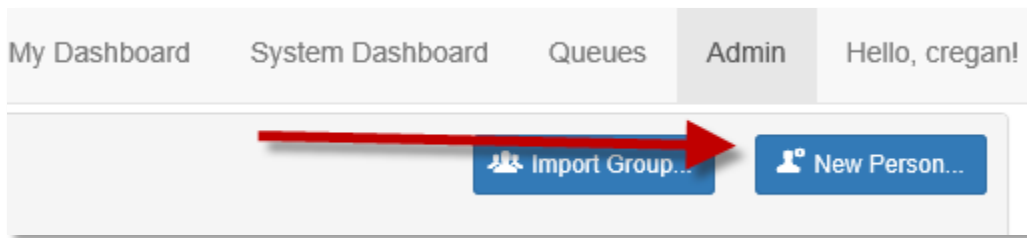


Figure 4: Adding a new person

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

A screenshot of the 'New Person' configuration window. The window has a title bar with 'New Person' and a close button. Inside, there is a profile picture placeholder with a red question mark. To the right of the placeholder are input fields for 'First' (First Name) and 'Last' (Last Name), and a 'Dir...' button. Below these is a checkbox for 'Administrator'. Further down are input fields for 'SIP' (sip:user@domain.com) and 'Email' (Enter email). Below the email field are two dropdown menus: 'Account Type' (Testing) and 'Platform Type' (Lync). Below these are two more dropdown menus: 'Max/day' (0) and 'Max concurrent' (2). Below the 'Max/day' dropdown is a note: 'Leave as '0' for no restriction'. At the bottom is a text area for 'Agent Skill Tags:'. At the very bottom are two buttons: 'Close' and 'Save changes'.

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.

Picker

ca Search

Common Name	Display Name	SIP URI	
Cassie Regan	Cassie Regan	sip:cregan@instant-tech.com	+
Ken Mercado	Ken Mercado	sip:kmercado@instant-tech.com	+

Showing 1 to 2 of 2 entries Previous 1 Next

Close

Figure 6: Selecting a user from the directory picker

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.

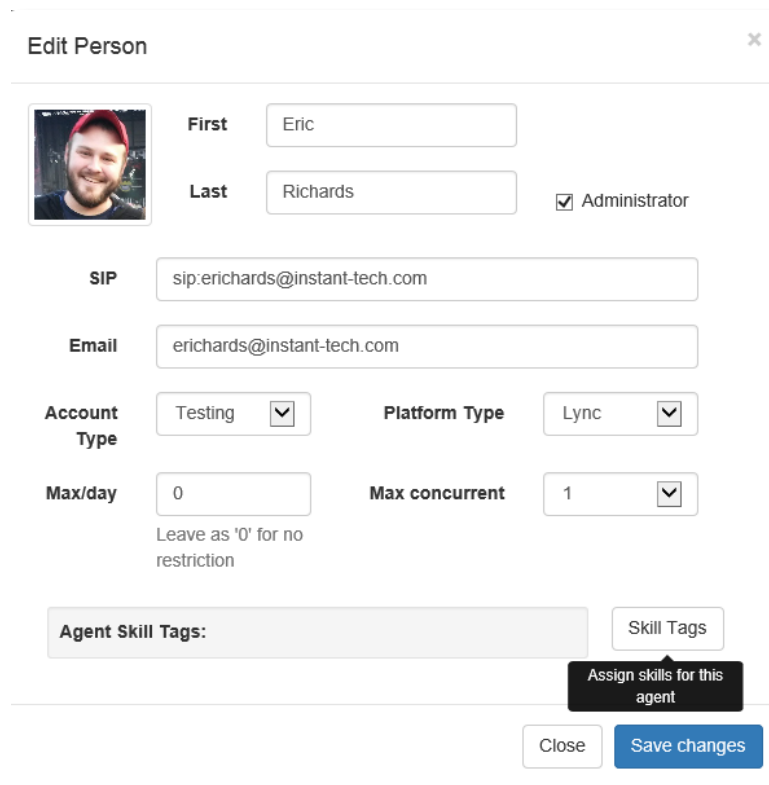
Once all the settings are configured click **Save changes**, and the user will instantly be provisioned within Chime.

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.

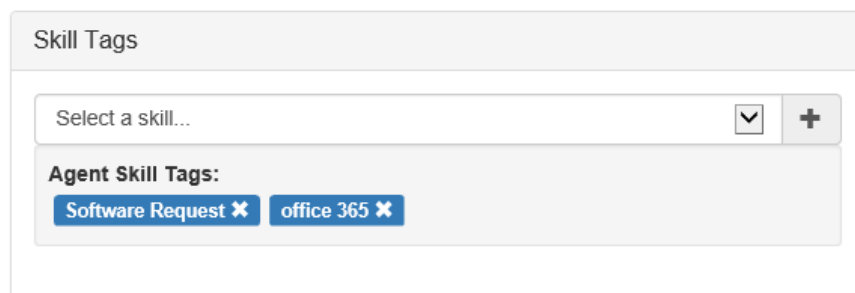


The 'Edit Person' window contains the following fields and controls:

- First:** Text input with 'Eric'.
- Last:** Text input with 'Richards'.
- Administrator:** Checked checkbox.
- SIP:** Text input with 'sip:erichards@instant-tech.com'.
- Email:** Text input with 'erichards@instant-tech.com'.
- Account Type:** Dropdown menu with 'Testing' selected.
- Platform Type:** Dropdown menu with 'Lync' selected.
- Max/day:** Text input with '0'. Below it, text reads: 'Leave as '0' for no restriction'.
- Max concurrent:** Dropdown menu with '1' selected.
- Agent Skill Tags:** A greyed-out section with a 'Skill Tags' button next to it.
- Buttons:** 'Close' and 'Save changes' at the bottom right.

A tooltip 'Assign skills for this agent' points to the 'Skill Tags' button.


Figure 7: Skill tags



The 'Skill Tags' section includes:

- A dropdown menu with the text 'Select a skill...' and a '+' button to the right.
- Agent Skill Tags:** A section containing two tags: 'Software Request' and 'office 365', each with a close button (X).

Figure 8: Selecting Skill Tags



First

Eric

Last

Richards

☒ Administrator

SIP

sip:erichards@instant-tech.com

Email

erichards@instant-tech.com

Account Type

Testing

Platform Type

Lync

Max/day

0

Leave as '0' for no restriction

Max concurrent

1

Agent Skill Tags:

Software Request

office 365


Skill Tags

Close

Save changes

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.

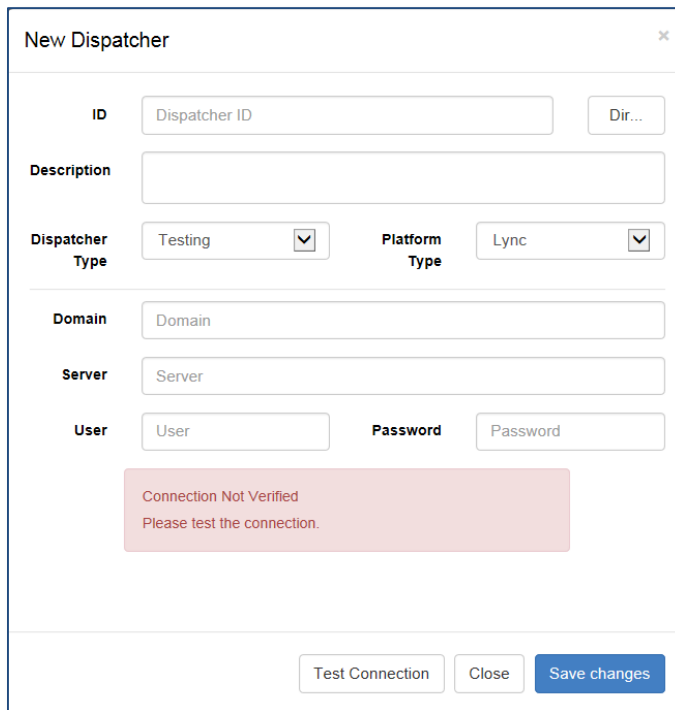


Figure 10: Chime dispatcher settings

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.

Code	Assigned to Queue	Maximum Agents	Expires on
1fe5cd74-31b0-45a7-8090-1a091a93c5ba-19-8d3123e7df74000	Sales	25	1/1/2016
e0edb2a0-723e-472c-93e2-470638d8eec8-3-8d78e4d8b7c0000	Chime Helpdesk	3	1/1/2020

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

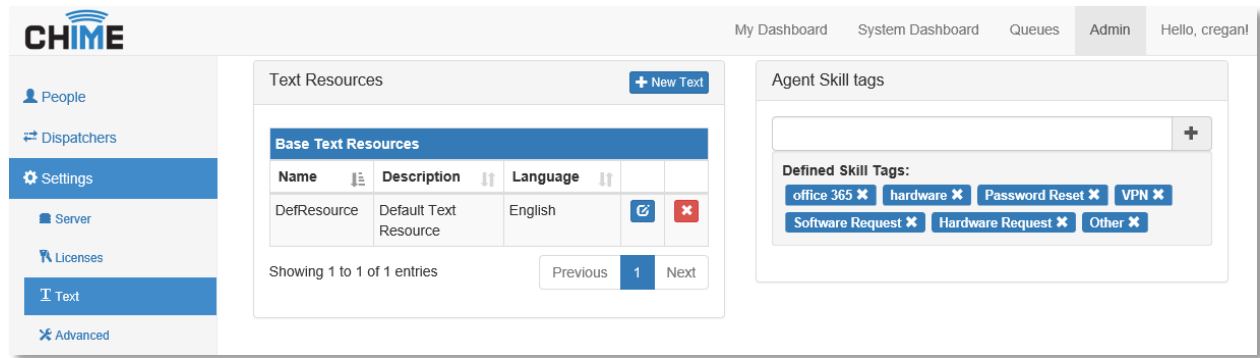


Figure 12: Skill Tags

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.

The 'New Queue' dialog box is shown with the following fields and controls:

- Name:** Text input field with placeholder 'Queue Name'.
- Description:** Text input field.
- Mode:** Dropdown menu.
- Language:** Dropdown menu.
- License:** Dropdown menu.
- Dispatcher:** A table with columns: Name, Description, Type, Platform. Below the table is a 'Select Dispatcher...' button.
- Buttons:** 'Close' and 'Save' buttons at the bottom right.

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.

The 'Queue Settings' window is titled 'Queue Settings' with a close button (X) in the top right corner. It features a tabbed interface with the following tabs: 'Basic' (selected), 'People', 'Text Resources', 'Routing', 'Schedule', and 'Advanced'.

Basic Tab:

- Name:** Chime Helpdesk
- Description:** (empty text field)
- Mode:** Development (dropdown menu)
- Language:** English (dropdown menu)
- License:** 3 Agents until 1/1/2020 (dropdown menu)
- Queue State:** Enabled (toggle switch)
- Send chat transcripts via email:** Enabled (toggle switch)

Dispatcher Section:

Name	Description	Type	Platform
sip:itdispatcher01@instant-tech.com	null	Testing	Lync

Buttons: 'Select Dispatcher ...' (blue), 'Close' (white), 'Save' (blue).

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.

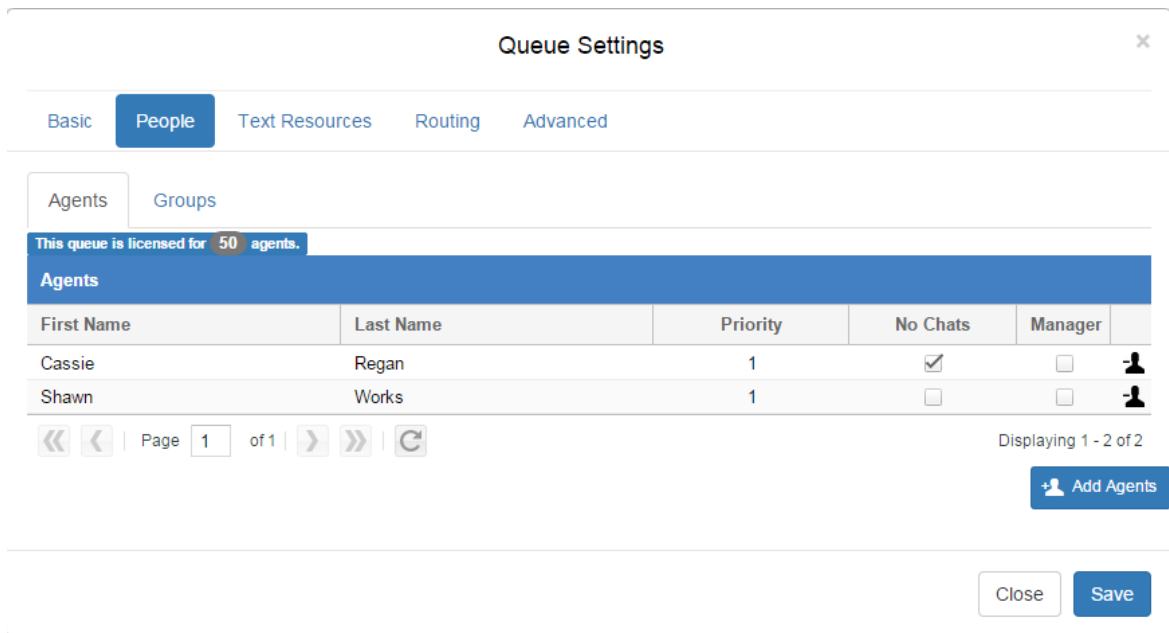
The screenshot shows a 'Queue Settings' dialog box with a close button (X) in the top right corner. The 'Basic' tab is selected, showing fields for Name, Description, Mode, Language, License, Queue State, and a toggle for 'Send chat transcripts via email'. Below these is a 'Dispatcher' section with a table listing a single dispatcher. At the bottom right are 'Close' and 'Save' buttons.

Queue Settings			
Basic People Text Resources Routing Schedule Advanced			
Name	Helpdesk		
Description			
Mode	Testing	Language	English
License	25 Agents until 1/1/2016	Queue State	Enabled
Send chat transcripts via email		Enabled	
Dispatcher			
Name	Description	Type	Platform
sip:qadispatch02@instant-tech.com	null	Testing	Office 365 Lync
			Select Dispatcher ...
		Close	Save

Figure 15: Basic Queue Settings

PEOPLE

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

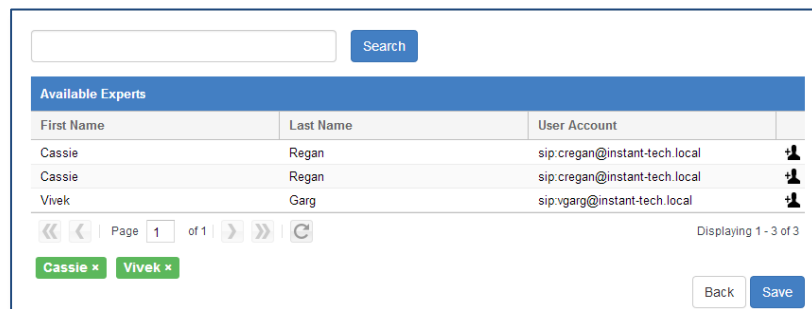


The screenshot shows the 'Queue Settings' dialog box with the 'People' tab selected. It displays a list of agents under the 'Agents' sub-tab. The list has columns for First Name, Last Name, Priority, No Chats, Manager, and an icon. Two agents are listed: Cassie Regan and Shawn Works. A status bar at the bottom indicates 'This queue is licensed for 50 agents.' and 'Displaying 1 - 2 of 2'. There are 'Close' and 'Save' buttons at the bottom right, and an 'Add Agents' button on the right side of the list.

First Name	Last Name	Priority	No Chats	Manager	
Cassie	Regan	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Shawn	Works	1	<input type="checkbox"/>	<input type="checkbox"/>	

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.



The screenshot shows a 'Search' field at the top. Below it is a table titled 'Available Experts' with columns for First Name, Last Name, User Account, and an icon. Three users are listed: Cassie Regan, Cassie Regan, and Vivek Garg. Below the table, there are 'Back' and 'Save' buttons. At the bottom, there are two green badges: 'Cassie x' and 'Vivek x'.

First Name	Last Name	User Account	
Cassie	Regan	sip:cregan@instant-tech.local	
Cassie	Regan	sip:cregan@instant-tech.local	
Vivek	Garg	sip:vgarg@instant-tech.local	

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.

Queue Settings

Basic

People

Text Resources

Routing

Schedule





Advanced

Agents

Groups

This queue is licensed for 25 agents.

Add Agents

First Name	Last Name	Tags	Priority	Manager	R/O	
Cassie	Regan	VPN	1	<input type="checkbox"/>	<input type="checkbox"/>	
MacGregor	Thompson		2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Matt	Quinlan		3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Rachel	Quimby	Email	1	<input type="checkbox"/>	<input type="checkbox"/>	

Showing 1 to 4 of 4 entries

Previous1Next

Saved successfully!

Close

Save

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.

The screenshot shows the 'Queue Settings' dialog with the 'Text Resources' tab selected. The 'Load a Standard Text Resource' dropdown is set to 'DefResource'. The left sidebar lists 'Seeker Text', 'Agent Text', 'System Text', 'Standard Replies', and 'Session Tags'. The main area, titled 'Seeker Resources', contains a list of text resources with edit icons:

Resource Name	Content	Edit Icon
Welcome Message		✎
	Thank you for contacting {QueueName}. The average wait time is {SeekerAverageWaitTime}. Please wait while I locate an agent for you.	
Searching for Person		✎
	Hi {SeekerFirstName}, we are currently locating someone to help. Please wait, we will connect you as soon as we can.	
Connected Message		✎
	Expert {ExpertFirstName} has accepted your request.	
No Person Available		✎
	Unfortunately, no one is available at this time. Please try again later.	
Chat Ended		✎
	{ExpertFirstName} has closed the chat session.	
Transferred Message		✎

At the bottom right are 'Close' and 'Save' buttons.

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.

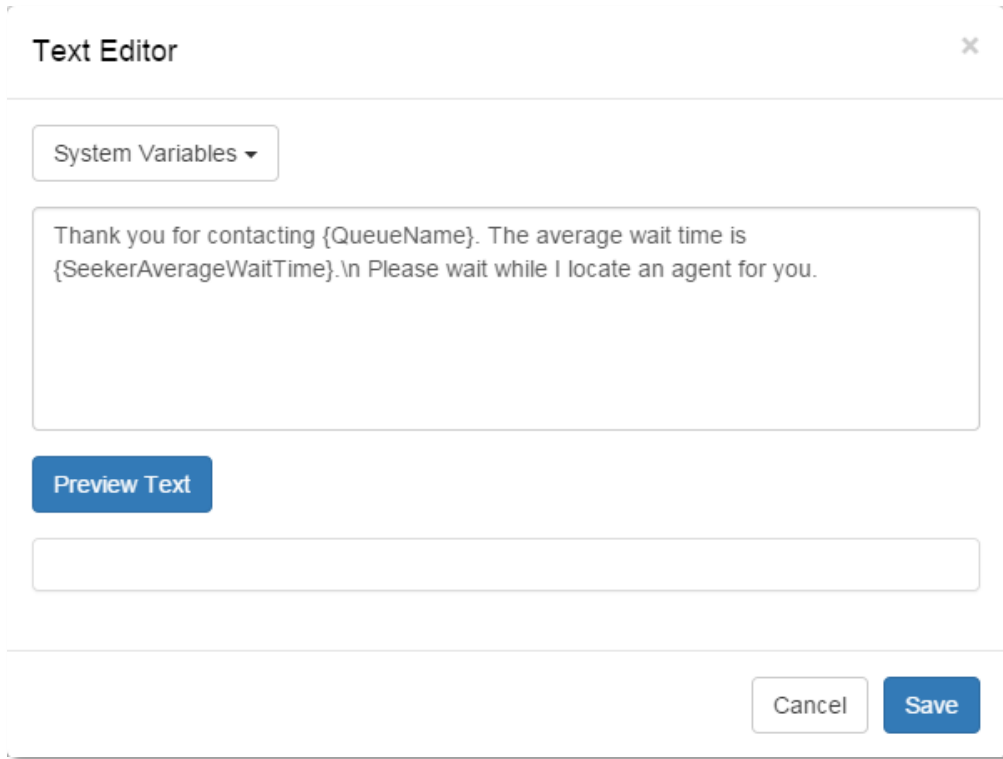
The screenshot shows the 'Queue Settings' interface with the 'Text Resources' tab selected. A yellow highlight is on the 'Load a Standard Text Resource' section, which includes a dropdown menu showing 'DefResource' and an 'Apply' button. A blue highlight is on the 'Seeker Text' button. Below this, the 'Seeker Resources' section is visible, showing a 'Welcome Message' and a text field with the placeholder 'Thank you for contacting {QueueName}. The average wait time is {SeekerAverageWaitTime}.\n'.

Queue Settings					
Basic	People	Text Resources	Routing	Schedule	Advanced
Load a Standard Text Resource:		DefResource	▼	Apply	
Seeker Text	Seeker Resources				
Agent Text	Welcome Message				
System Text	Thank you for contacting {QueueName}. The average wait time is {SeekerAverageWaitTime}.\n				

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.




The screenshot shows a modal window titled "Text Editor" with a close button (X) in the top right corner. Inside the modal, there is a dropdown menu labeled "System Variables" with a downward arrow. Below this is a large text area containing the text: "Thank you for contacting {QueueName}. The average wait time is {SeekerAverageWaitTime}.\n Please wait while I locate an agent for you." Below the text area is a blue button labeled "Preview Text". Underneath the button is a horizontal line representing a preview of the text. At the bottom right of the modal are two buttons: "Cancel" and "Save".

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.

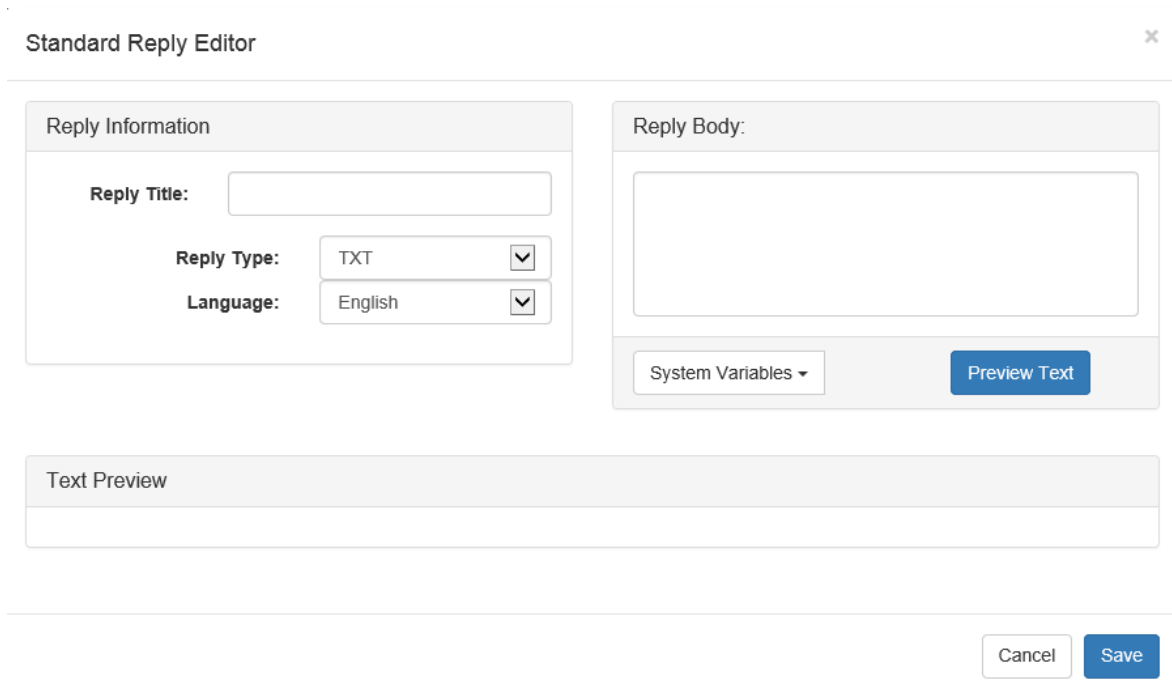
STANDARD REPLIES

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  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.



The image shows a 'Standard Reply Editor' window. It has a title bar with a close button. The main area is divided into two columns. The left column, titled 'Reply Information', contains a 'Reply Title' text field, a 'Reply Type' dropdown menu (currently showing 'TXT'), and a 'Language' dropdown menu (currently showing 'English'). The right column, titled 'Reply Body:', contains a large text area for the reply body. Below the text area is a 'System Variables' dropdown menu and a 'Preview Text' button. At the bottom of the window is a 'Text Preview' section, which is currently empty. In the bottom right corner, there are 'Cancel' and 'Save' buttons.

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.

The screenshot shows the 'Queue Settings' dialog box with the 'Text Resources' tab selected. On the left, a sidebar lists 'Seeker Text', 'Agent Text', 'System Text', 'Standard Replies', and 'Session Tags' (which is highlighted). The main area is titled 'Define System Tags' and contains a text input field with a '+' button. Below this is a section titled 'Defined Session Tags' displaying a list of tags: 'email', 'password reset', 'VPN', 'Lync', 'Excel', 'Office', 'install', and 'VPN password'. Each tag is in a blue box with a close icon. At the bottom right of the dialog are 'Close' and 'Save' buttons.

Figure 23: Session Tags

ROUTING

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

The screenshot shows a 'Queue Settings' dialog box with a close button (X) in the top right corner. The 'Routing' tab is selected, showing the following settings:

- Select Routing Type**
 - Routing Method:** A dropdown menu with 'Hunt' selected.
 - Route by Priority?:** A dropdown menu with 'Yes' selected.
 - Accept Timeout (seconds):** A text input field with '30'. Below it, it says 'Default is 30'.
- Seeker Timeout (seconds):** A text input field with '300'. Below it, it says 'Default is 5 minutes (300 seconds)'.
- Seeker Update Interval (seconds):** A text input field with '45'. Below it, it says 'If blank, the default is 10 seconds'.

At the bottom right, there are 'Close' and 'Save' buttons.

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.

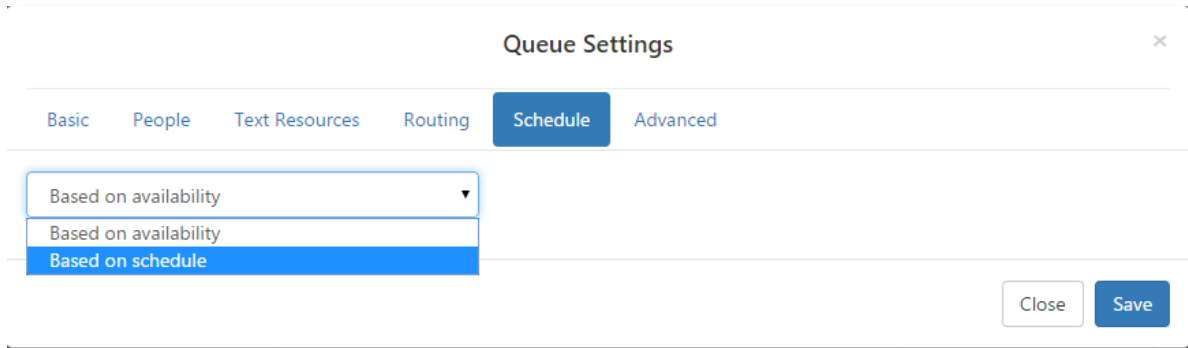
Seeker Update Interval: The frequency at which users will receive the message informing them that the queue is attempting to connect them with an agent.

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:

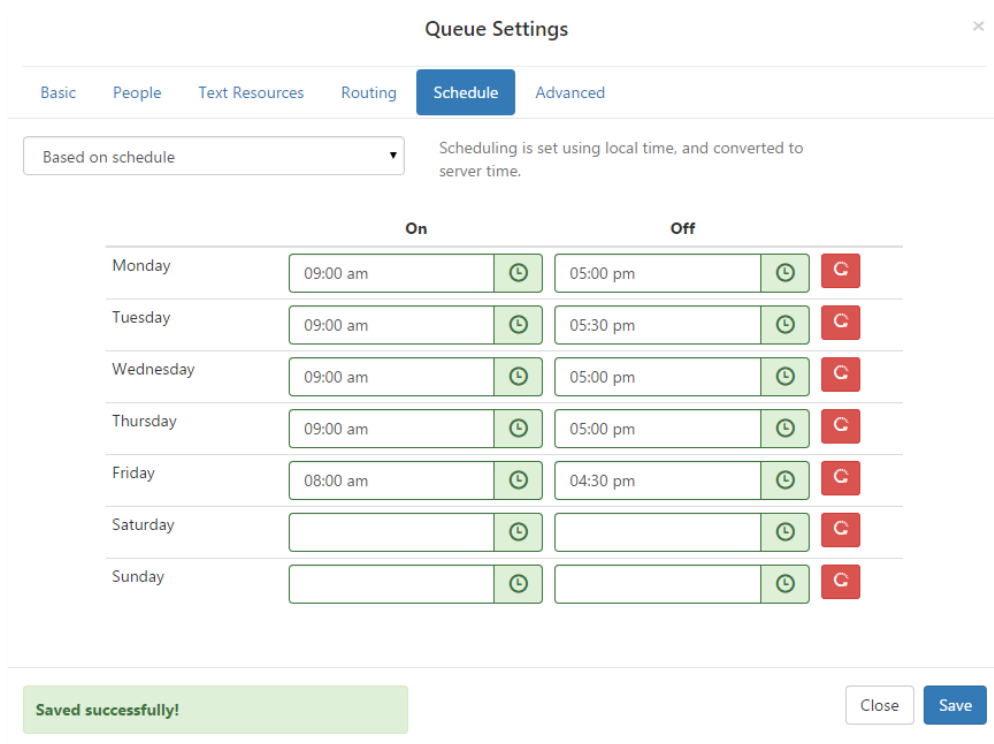
1. Go to Queue **Settings > Routing** to enable a queue schedule. Select the '**Based on Schedule**' option from the drop-down menu.



The image shows a 'Queue Settings' dialog box with a close button (X) in the top right corner. It has five tabs: 'Basic', 'People', 'Text Resources', 'Routing', and 'Schedule'. The 'Schedule' tab is currently selected and highlighted in blue. Below the tabs, there is a dropdown menu that currently shows 'Based on availability'. The dropdown is open, showing two options: 'Based on availability' and 'Based on schedule'. The 'Based on schedule' option is highlighted in blue. At the bottom right of the dialog, there are two buttons: 'Close' and 'Save'.

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.



The image shows the 'Queue Settings' dialog box with the 'Schedule' tab selected. The dropdown menu now shows 'Based on schedule'. Below the dropdown, there is a note: 'Scheduling is set using local time, and converted to server time.' Below this, there is a table with columns for 'On' and 'Off' times for each day of the week. Each time field has a clock icon to its right. A red 'C' icon is present to the right of each 'Off' time field. At the bottom left, there is a green message box that says 'Saved successfully!'. At the bottom right, there are 'Close' and 'Save' buttons.

	On	Off
Monday	09:00 am	05:00 pm
Tuesday	09:00 am	05:30 pm
Wednesday	09:00 am	05:00 pm
Thursday	09:00 am	05:00 pm
Friday	08:00 am	04:30 pm
Saturday		
Sunday		

Figure 26: Queue Schedule

- 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.

The screenshot shows the 'Queue Schedule' interface with the 'Schedule' tab selected. A dropdown menu is open for the 'On' time of Monday, displaying a time picker with a blue 'AM' button. The interface includes tabs for Basic, People, Text Resources, Routing, Schedule, and Advanced. A note states: 'Scheduling is set using local time, and converted to server time.'

	On		Off		
Monday	09:00 am	🕒	05:00 pm	🕒	🔄
Tuesday	⬆ ⬆	🕒	05:30 pm	🕒	🔄
Wednesday	09 : 00 AM	🕒		🕒	🔄
Thursday	⬇ ⬇	🕒	05:00 pm	🕒	🔄
Friday	08:00 am	🕒	04:30 pm	🕒	🔄

Figure 27: Queue Schedule – Choose time

The screenshot shows the 'Queue Schedule' interface with the 'Schedule' tab selected. A dropdown menu is open for the 'On' time of Tuesday, displaying a number picker with digits 01-03. The interface includes tabs for Basic, People, Text Resources, Routing, Schedule, and Advanced. A note states: 'Scheduling is set using local time, and converted to server time.'

	On		Off		
Monday	09:00 am	🕒	05:00 pm	🕒	🔄
Tuesday	12 01 02 03	🕒	05:30 pm	🕒	🔄
Wednesday	04 05 06 07	🕒		🕒	🔄
Thursday	08 09 10 11	🕒	05:00 pm	🕒	🔄

Figure 28: Queue Schedule – Choose time

- 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

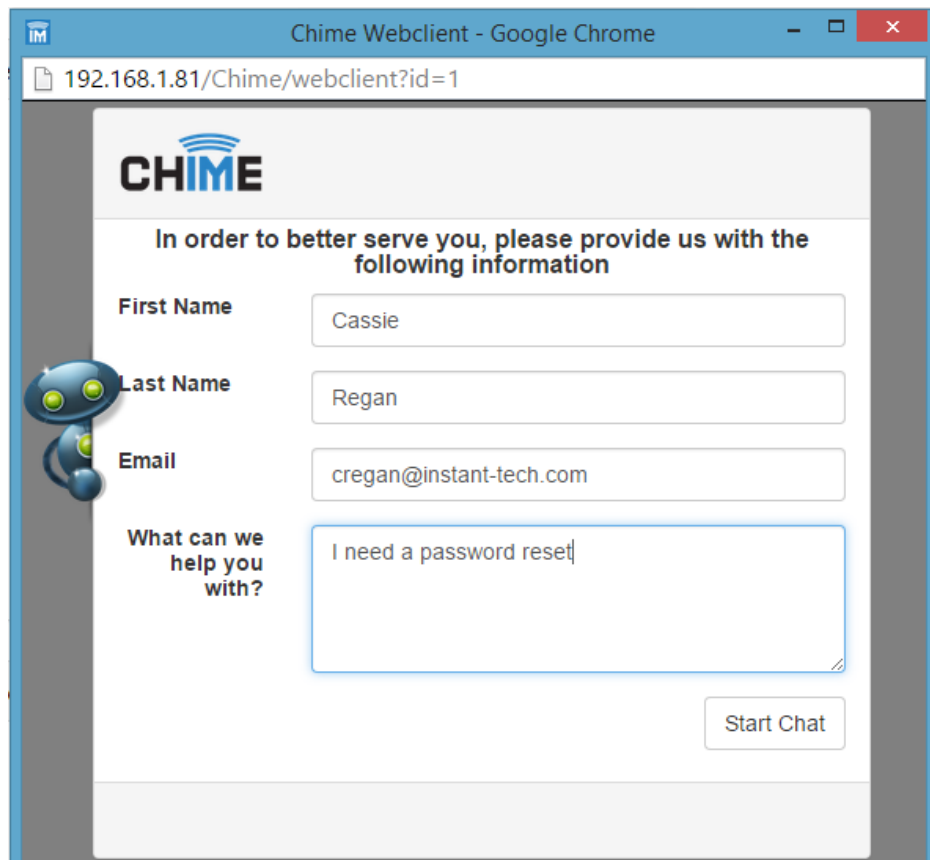
LYNC

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:



The screenshot shows a web browser window titled "Chime Webclient - Google Chrome". The address bar displays the URL "192.168.1.81/Chime/webclient?id=1". The page features the "CHIME" logo at the top. Below the logo, a message reads: "In order to better serve you, please provide us with the following information". The form includes four input fields: "First Name" (containing "Cassie"), "Last Name" (containing "Regan"), "Email" (containing "cregan@instant-tech.com"), and a larger text area for "What can we help you with?" (containing "I need a password reset"). A "Start Chat" button is located at the bottom right of the form. A small, stylized robot icon is positioned to the left of the form fields.

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:

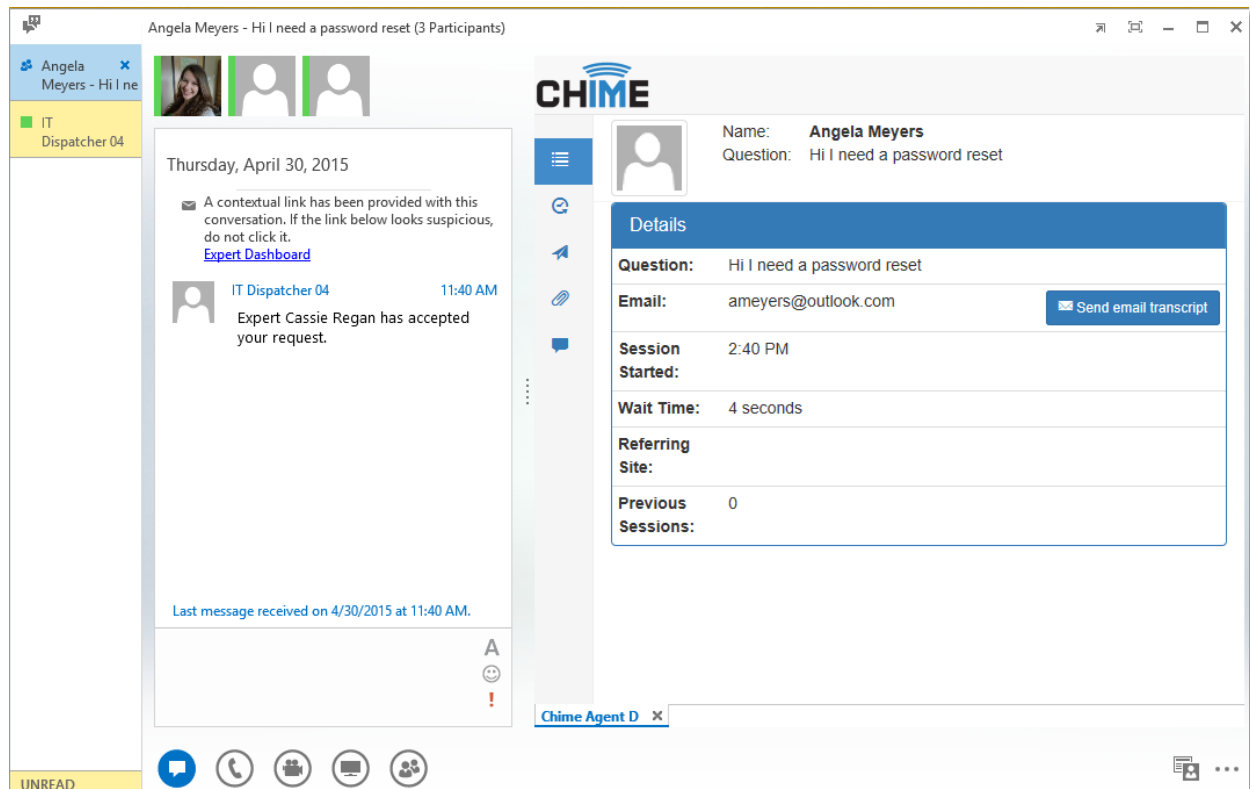


Figure 30: Agent Context Window

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.

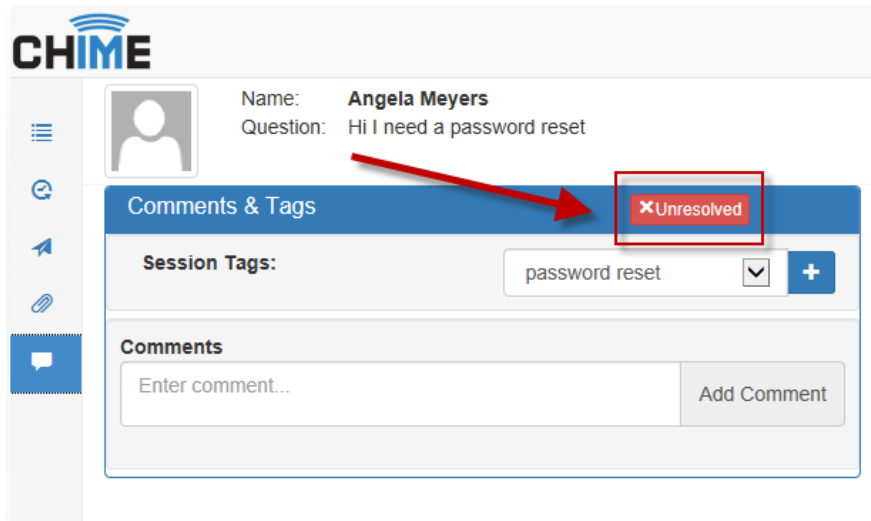


Figure 31: Unresolved Chat Session

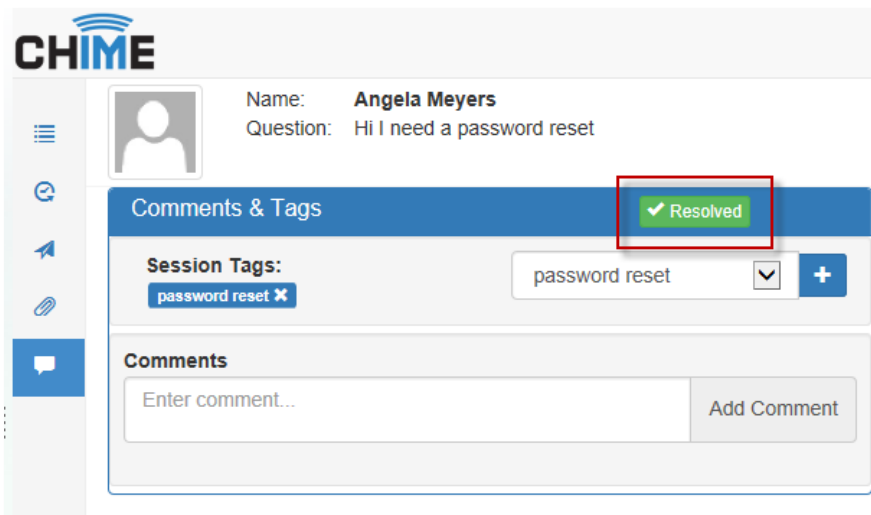


Figure 32: Resolved Chat Session