



INSTALLATION GUIDE

April 2015

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CHIME INSTALLATION GUIDE

SYSTEM REQUIREMENTS

- 64-bit Windows Server®: 2008 R2, 2012, 2012 R2
 - Server 2008 R2 requires Desktop Experience feature to be installed
 - Server 2012/2012 R2 requires Media Foundation feature to be installed
- Application cannot be installed on the same server hosting Lync®. Application will conflict with Lync® settings.
- Connection to Microsoft SQL Server®. The application supports full SQL Server® or SQL Express Edition®
 - Account with create access to SQL server (for building and updating the Chime database)
 - Account with read\write access to Chime database
 - The application supports both SQL and Windows server authentication options.
 - *Note:* For optimal performance, Chime and SQL Server should be in the same physical site.
- Read Access to Windows Active Directory

Chime 2.0 (Self hosted) with Lync On-Premise support

- .Net Framework 4.5.1+
- UMCA 4.0
- SQL Server 2008 R2+ (SQL Express, Standard, Enterprise...)
- 1 Lync account for Web Client
- 1 Lync account per queue for dispatcher

Chime 2.0 (Self hosted) with Office 365 support

- .Net Framework 4.5.1+
- UMCA 4.0
- SQL Server 2008 R2+ (SQL Express, Standard, Enterprise...)
- Office 2013 Lync (Lync 2013 Basic cannot be used)
- 1 Office 365 Lync account for Web Client*
- 1 Office 365 Lync account per queue for dispatcher*

**Lync Online Plan 2 and Microsoft Office 365 with Lync Plans are supported*

REQUIRED ACCOUNTS:

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

Active Directory query account

This account will be used by Chime to query Active Directory for users

AD Username: _____

Password: _____

Chime Database Account

This account is used to create the Chime database during the installation. This account requires admin privileges on the SQL server.

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

Username: _____

Password: _____

Chime Database Service Account

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

Username: _____

Password: _____

Chime Service Account

This account will be used as the login for the Windows Service. If using Windows Authentication on the SQL connection, this must be the same account. This account must be granted the Local Security Setting of "Logon as a service".

This account must be a member of the Chime server's local Administrator group or a member of the Domain Admins group of the domain to which the Chime server is joined. This is required for the OWIN web server components which power the Chime web interface to operate.

Username: _____

Password: _____

Web Seeker account - *This account will be used by Chime to connect request from the web chat to Lync experts. This account needs to be Lync enabled and not used anywhere else.*

AD Username: _____

Password: _____

Dispatcher accounts - *This account will be used by Chime to connect request from a seeker to Lync experts. This account needs to be Lync enabled. Each queue will need a separate dispatcher.*

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 **ChimeSHInstaller.exe**. You will be prompted with the Chime for Lync Setup wizard.



Figure 1: Chime for Lync Setup Wizard

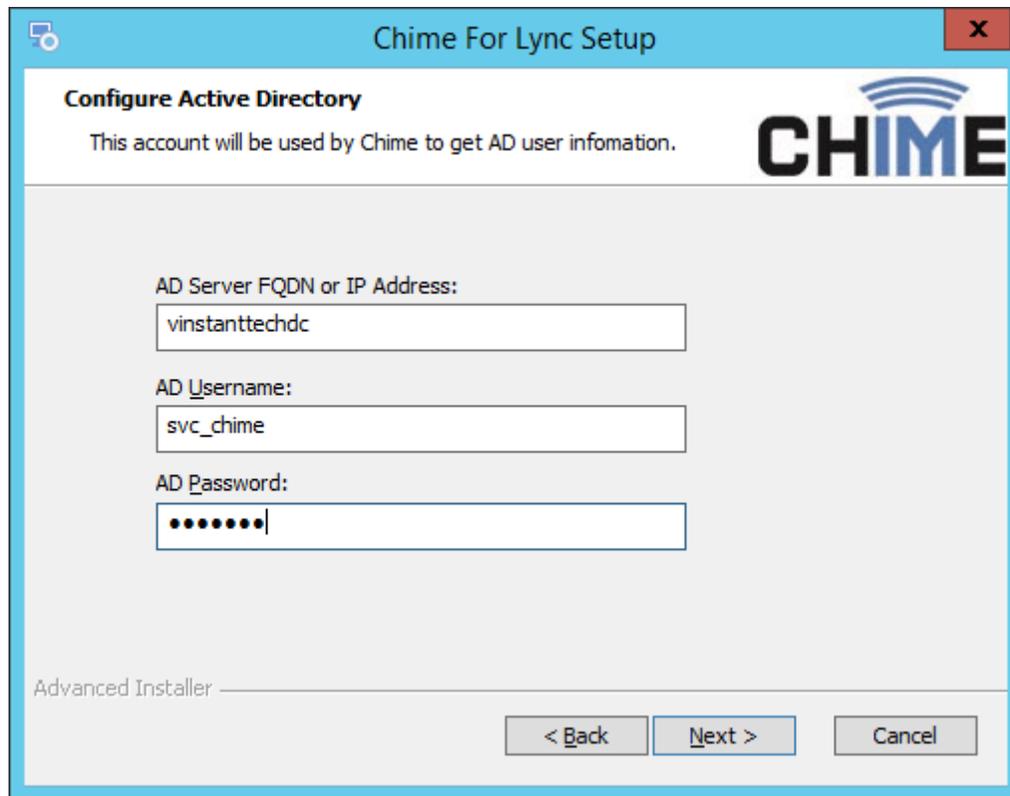
2. Click Next to proceed through the Setup wizard.

During the setup, you will need to enter the credentials for the following required accounts:

- Active Directory Query Account
- Chime Database Account
- Chime for Lync Service Account

ACTIVE DIRECTORY

The first required account is Active Directory. You will need the Active Directory account information to fill out this section.



Chime For Lync Setup

Configure Active Directory

This account will be used by Chime to get AD user information.

CHIME

AD Server FQDN or IP Address:
vinstanttechdc

AD Username:
svc_chime

AD Password:
●●●●●●●

Advanced Installer

< Back Next > Cancel

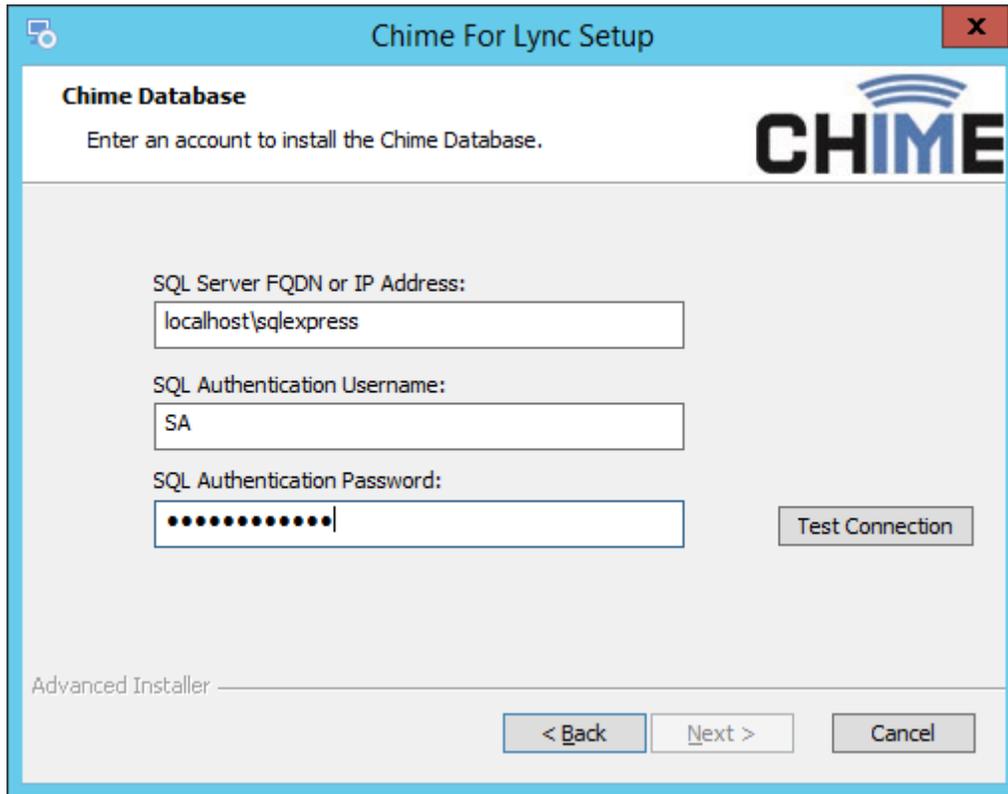
Figure 2: Active Directory Configuration

1. Enter the Active Directory Fully Qualified Domain Name, or IP Address of the server hosting Active Directory.
2. Enter the username that Chime can use to query Active Directory.
3. Enter the password for the username provided. The password will be encrypted. Chime requires read access of your Active Directory.
4. Click **Next** once you have entered the Active Directory account information.

CHIME DATABASE

Chime requires an account with administrative rights to the SQL database. In this section of the Setup wizard, the Chime database will be created. Chime requires read/write access to its own database.

CREATE/UPDATE THE DATABASE

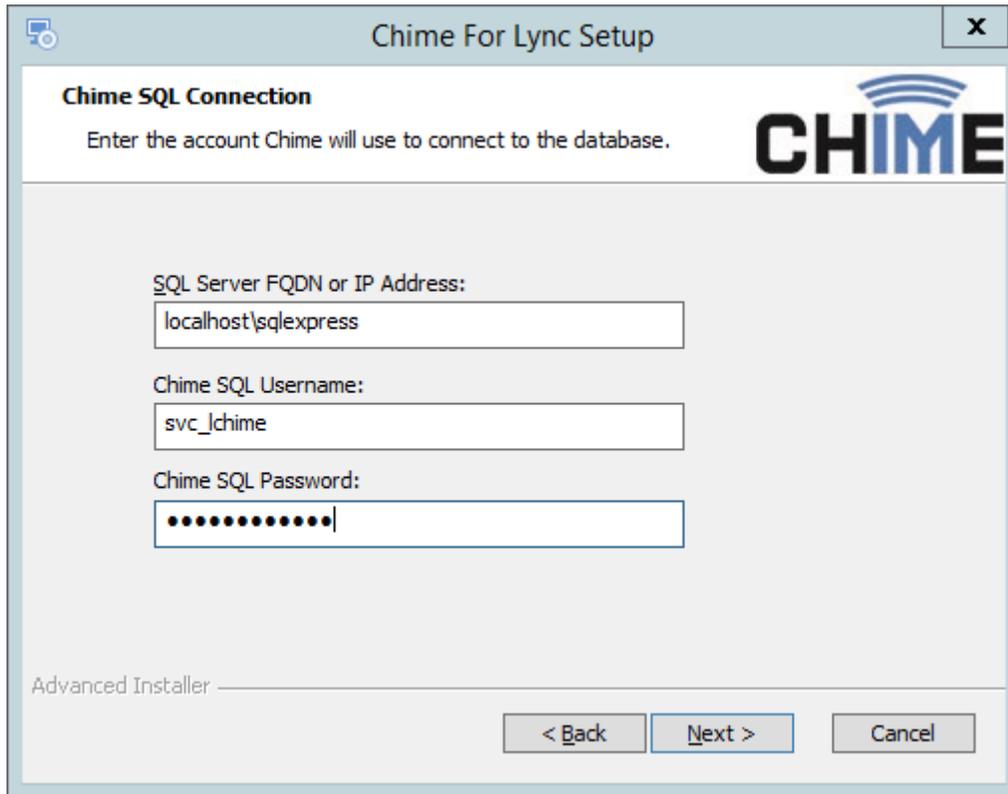


The screenshot shows a window titled "Chime For Lync Setup" with a close button (X) in the top right corner. The main heading is "Chime Database" with the instruction "Enter an account to install the Chime Database." and the CHIME logo. The form contains three input fields: "SQL Server FQDN or IP Address:" with the value "localhost\sqlexpress", "SQL Authentication Username:" with the value "SA", and "SQL Authentication Password:" with masked characters. A "Test Connection" button is located to the right of the password field. At the bottom, there is an "Advanced Installer" label and three navigation buttons: "< Back", "Next >", and "Cancel".

Figure 3: Chime Database Setup

1. Enter the Fully Qualified Domain Name or IP address of the SQL Server where the Chime database will be installed.
2. Provide the username of the account that will be used to create the Chime database. This account needs sys_admin rights for the SQL Server.
3. Enter the password for the SQL account.
4. Click on **Test Connection** once the require account information has been entered.
5. Click **Next** to proceed to the next section.

CONFIGURE DATABASE SERVICE ACCOUNT



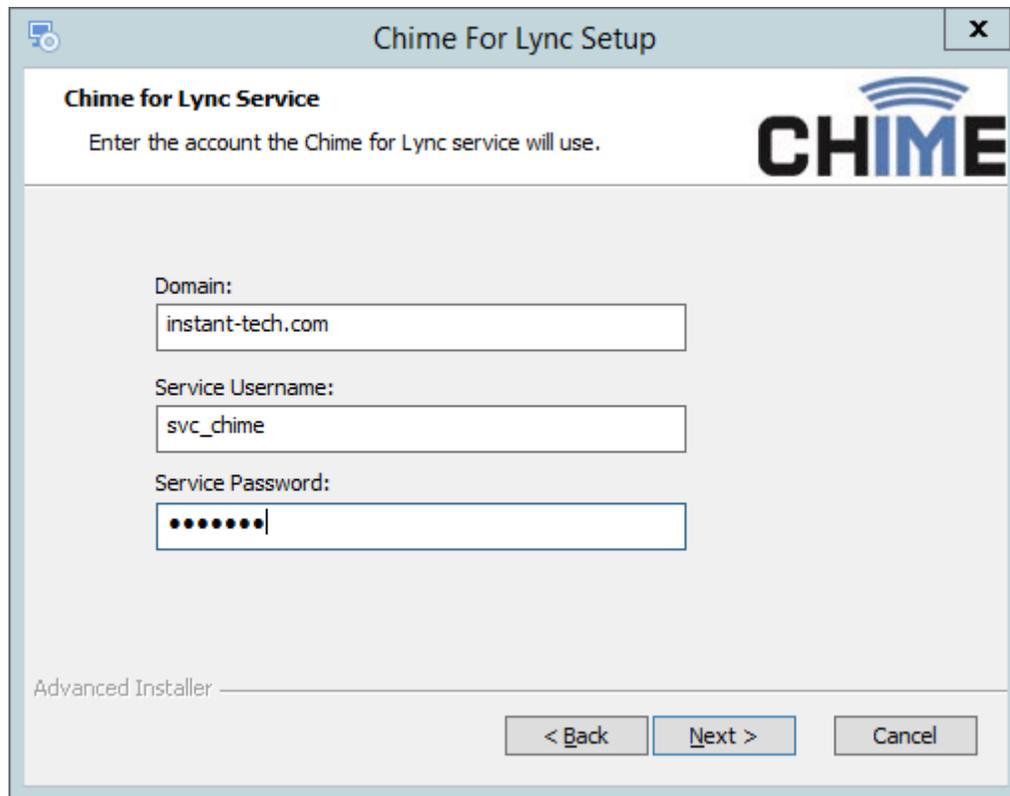
The screenshot shows a Windows-style dialog box titled "Chime For Lync Setup". Inside, there's a section titled "Chime SQL Connection" with the instruction "Enter the account Chime will use to connect to the database." and the CHIME logo. Three input fields are present: "SQL Server FQDN or IP Address:" containing "localhost/sqlexpress", "Chime SQL Username:" containing "svc_chime", and "Chime SQL Password:" which is masked with 12 dots. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Figure 4: Configure Database Service Account

1. Enter the Fully Qualified Domain Name or IP address of the SQL Server instance where the Chime database is installed
2. Enter the username for the service account Chime will use to access the database.
3. Enter the password for the service account
4. Click **Next** to proceed.

SERVICE ACCOUNT

The Chime for Lync Service account is the account that will be used to run the Chime Self-Hosted application.



Chime For Lync Setup

Chime for Lync Service
Enter the account the Chime for Lync service will use.

Domain:
instant-tech.com

Service Username:
svc_chime

Service Password:
●●●●●●

Advanced Installer

< Back Next > Cancel

Figure 5: Chime Service Account

1. Enter the name of the domain that the Chime service account belongs to.
2. Provide the username of the account that will be used to run Chime.
3. Enter the password for the provided username.
4. Click **Next** to proceed through the installation.
5. Click **Install** to begin installation of the Chime application.

CHIME CONFIGURATION WIZARD

Once all the required account information has been filled out in the Chime Setup wizard, you will be prompted with the next part of the installation, the Configuration Wizard. In this section you will do the following:

- Verify Active Directory account information
- Verify and test connection to the SQL Database
- Pick the first user for the Chime application
- Setup the Chime Web Client

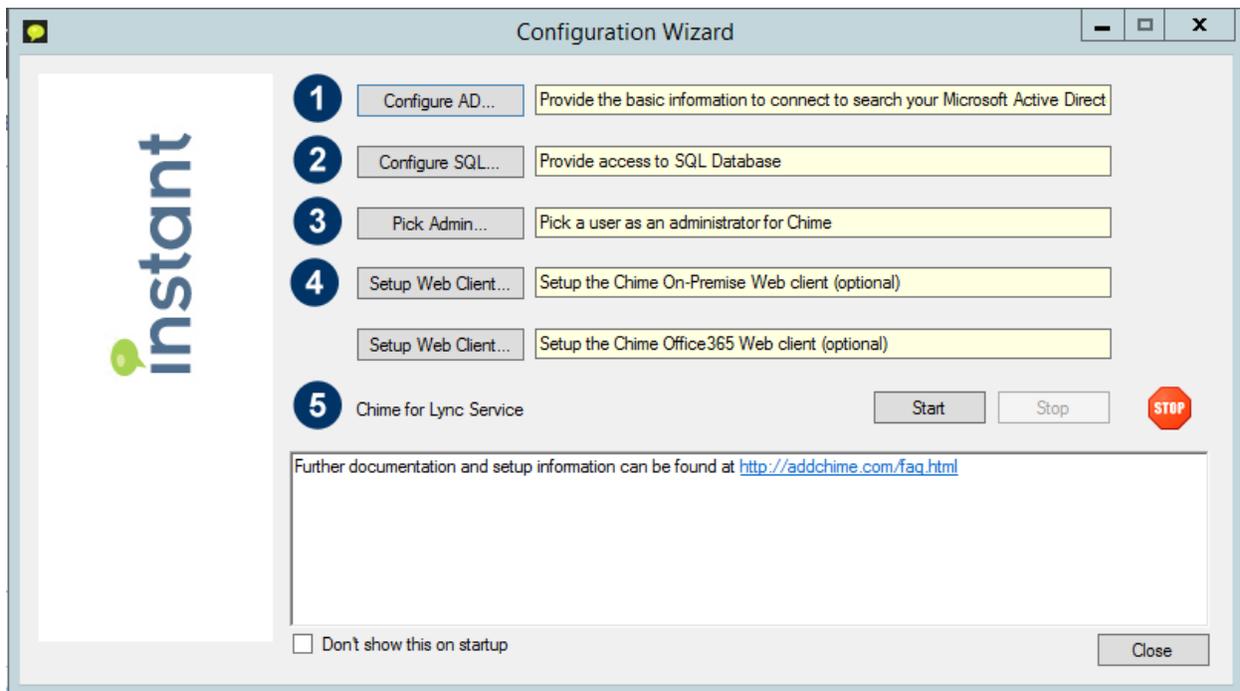


Figure 6: Configuration Wizard

CONFIGURE ACTIVE DIRECTORY

In the first step of the configuration wizard, you will need to verify your active directory credentials.

1. Click **Configure AD**.
2. Enter the Active Directory FQDN, username, and password.
3. Click **Validate**.

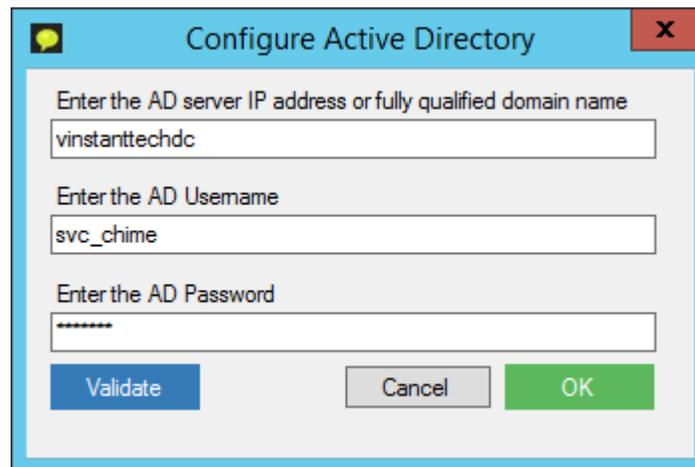


Figure 7: Active Directory

4. Click **OK** on the alert once you have been notified that we've successfully connected to Active Directory.
5. Click **OK** to proceed to the next step.

CONFIGURE SQL

In this section you will need to enter the required account information for the Chime SQL account. This account needs read and write access to the Chime database.

1. Click **Configure SQL** in the configuration wizard.
2. Enter the name of the SQL instance that Chime will be hosted on.

Configure SQL Connection

Enter the SQL Server IP address or fully qualified domain name
localhost\\sqlexpress

Chime SQL Account *Chime uses this account to read and write from the database and will be saved.*

Authentication: SQL Server Authentication

Username: svc_chime
ex. yourdomain\jwayne

Password: *****

Cancel Test Connection OK

Figure 8: SQL Connection

3. Select the appropriate authentication method for the Chime SQL account.
4. Enter the username and password for the Chime SQL account.
5. Click on **Test Connection** to test the connection to the database.

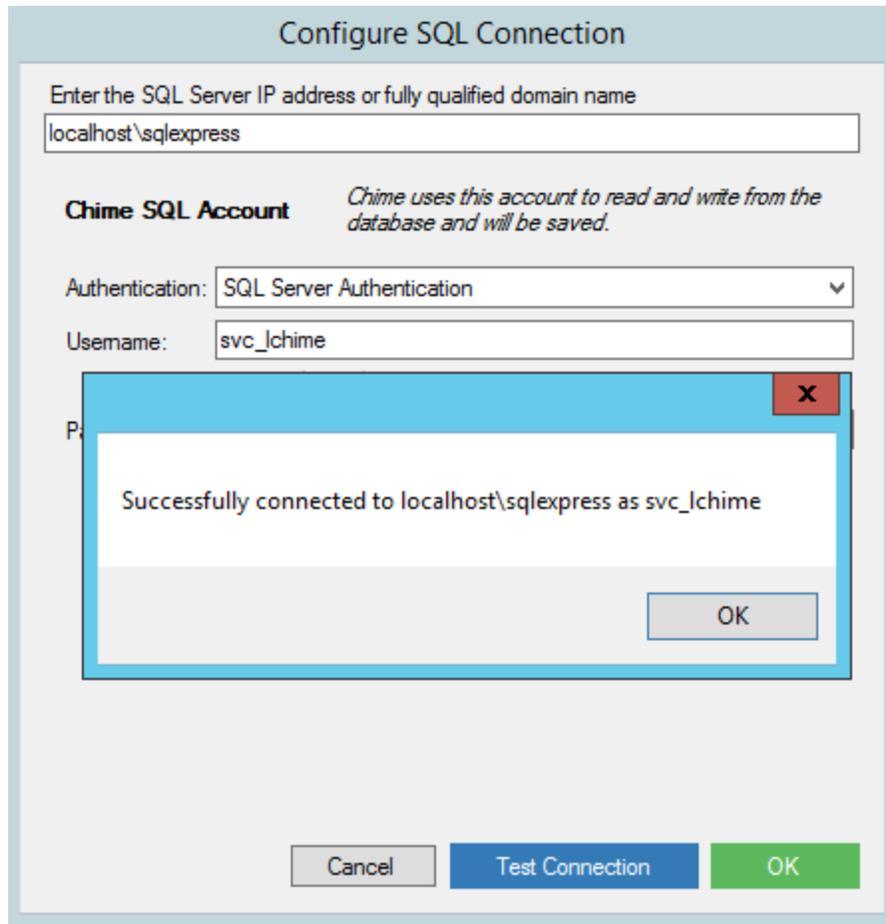


Figure 9: Test SQL Connection

6. Click **OK** once you have successfully connected to the database.
7. Click the green **OK** button in the Configure SQL Connection window to proceed to the next step.

PICK ADMIN USER

Chime will need a Lync-enabled account to be configured as the first Admin user of Chime. That person will be able to add other people once they log in.

1. Click on Pick Admin from the Configuration Wizard.
2. Enter the partial or full username of the person who will be the first admin. Click Search to find the user.

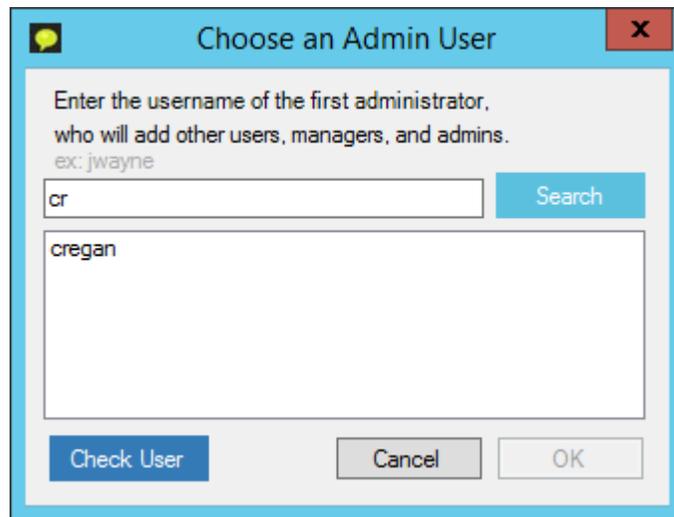


Figure 10: Pick Admin User

3. Select the correct user from the list, and click Check User.

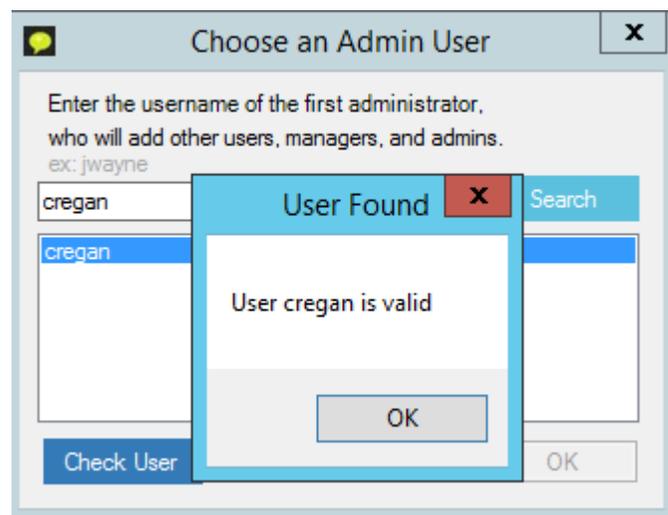


Figure 11: Check User

4. Once you've verified that the user picked is valid, click OK. Then, click OK in the Choose Admin user window to proceed to the next step of the Configuration Wizard.

SETUP WEB CLIENT (OPTIONAL)

There are two options in the configuration wizard for setting up the Web Client:

1. Setup the Chime on premise web client – uses your on premise Lync Server
2. Setup the Chime Office 365 web client – uses an Office 365 Lync-enabled account

SETUP ON PREMISE WEB CLIENT

Follow these instructions to setup the Web Client with an on premise Lync Server.

SETUP OFFICE 365 WEB CLIENT

Follow these instructions to setup the Web Client with an Office 365 account.

1. In the Configuration Wizard, click on Step 5 (Setup the Chime Office 365 Web Client)

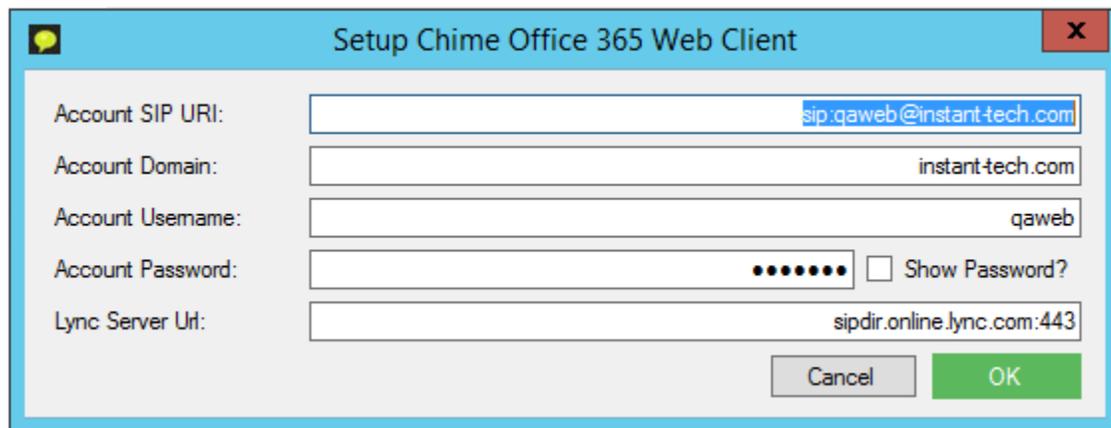


Figure 12: Setup Web Client

2. Account SIP URI: Enter the SIP URI for a Lync-enabled Office 365 account. The Chime Web Client will log in as this account.
3. Account Domain: Enter the name of the domain that the chosen Office 365 account belongs to.
4. Account Username: Enter the full username of the chosen Office 365 account.
5. Account Password: Type in the password for the username provided.
6. Lync Server URL: Provide the Lync Server URL. The link should be: **sipdir.online.lync.com:443**
7. Click OK.

8. You have finished all steps of the Configuration Wizard. Click Close to finish the Chime installation.

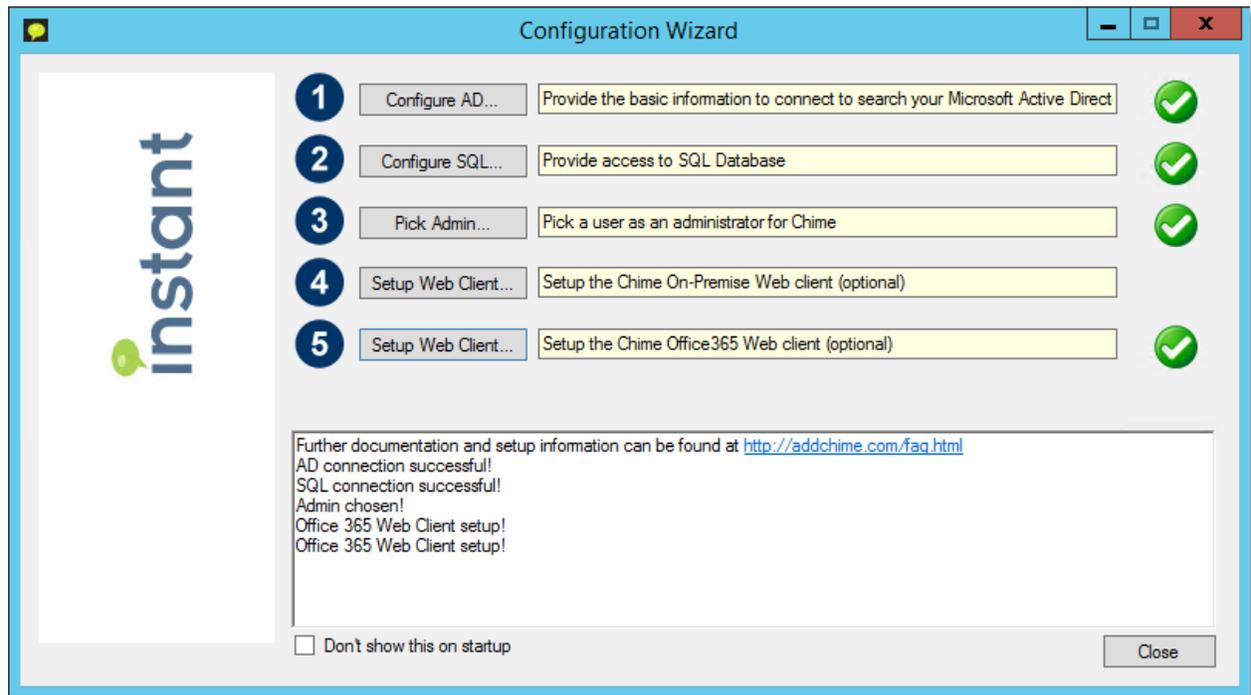


Figure 13: Configuration Wizard Complete

Once the installation wizard has finished, you are ready to start the Chime application.

START THE CHIME APPLICATION

Follow these instructions to manually start the Chime application.

1. Log on to the server that Chime is hosted on.
2. Go to the Control Panel, and navigate to Administrative Tools.
3. Open 'Services'.
4. Find 'Chime for Lync' in the list of services.
5. Right-click on Chime for Lync and click 'Start'.

ISSUES STARTING THE CHIME APPLICATION

UNABLE TO START THE CHIME SERVICE – INCORRECT LOGON

If you are unable to start the Chime service due to a logon failure, it's possible that you entered the incorrect credentials for the Chime Service account during the install. To verify these credentials, follow these steps:

1. Log on to the server that Chime is hosted on.
2. Go to the **Control Panel**, and navigate to **Administrative Tools**.
3. Open **'Services'**.
4. Find **'Chime for Lync'** in the list of services.
5. Right-click on Chime for Lync and click on **'Properties'**.
6. Navigate to the **'Log On'** tab.
7. **Click OK** once the account credentials have been changed or verified.
8. Follow the steps to start the Chime service.

UNABLE TO START THE SERVICE – LOG ON AS A SERVICE

If you are unable to start the Chime service, and receive an error message that the account doesn't have the proper rights, you will need to give administrative rights to the Chime Service account.

1. Log on to the server that Chime is hosted on.
2. Go to the **Control Panel**, and navigate to **Administrative Tools**.
3. Open **'Local Security Policy'**
4. Under **'Local Policies'**, click on **'User Rights Assignment'**.
5. Click on **'Log On as a Service'**, and then click on **Add User or Group**.
6. Enter the service account name, and click **'Check Names'**
7. **Click OK** once you've selected the service account to add.
8. Follow the steps to start the Chime service.

ACCESS THE CHIME APPLICATION

Once you've successfully installed Chime, you are ready to access the application.

1. Type in the URL of the Chime instance. It will look something like this:

<http://<ServerName>.<DomainName>/chime>

- or -

<http://<IPAddress>/chime>

2. Log in to the application.
3. You are ready to add more administrators, agents, and start routing chats.

The screenshot shows the Chime Agent Dashboard in a web browser. The browser address bar displays "192.168.1.82/Chime". The dashboard header includes the CHIME logo, navigation tabs for "My Dashboard", "System Dashboard", "Queues", and "Admin", and a user greeting "Hello, cregant".

The main content area features a user profile for "Cassie Regan" on the left. To the right, there are four summary cards:

- Conversations: 0
- Average Speed to Answer: 00:00:00
- Avg. Chat Duration: 00:00:00
- Total Chat Duration: 00:00:00

Below these cards is a section titled "Agent Activity for Cassie Regan" which is currently empty. Further down, there are sections for "Chats Today" (displaying "No Data") and "Chat History" (displaying a table with columns for Seeker, Question, and Time).

The footer contains contact information: "1(800)884-0443", "support@instant-tech.com", and "View Logs". It also includes the build version "Build: v2.0.2161" and the copyright notice "© 2015 - instant".

Figure 14: Chime Agent Dashboard