



CHIME GDPR INSTALLATION AND USAGE GUIDE

May 2020

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CHIME GDPR INSTALLATION AND USAGE GUIDE

INSTALL CHIME GDPR TOOL

Before you can perform any GDPR operations you need to prepare a few things to use the application. The Chime GDPR Tool needs to be installed on a Windows based system and you will also need to have an up to date copy of the settings file used on the Chime server that you want to perform GDPR operations on.

Note: you do NOT need to install this application on the server that Chime is running on, however you will need to have network access to the Database server that your Chime instance is using. If you choose to run this application on the server that Chime is hosted on, ensure that the server has enough processing power to run the application in addition to the load created from the Chime instance.

INSTALLING THE GDPR TOOL

1. Run the GDPR-Installer.msi file.
2. Click Next.

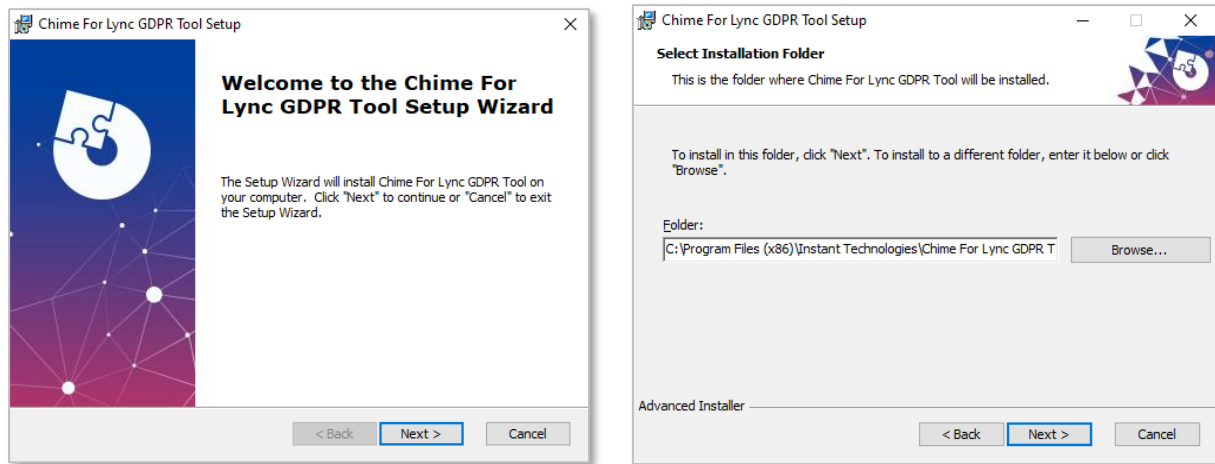


Figure 1: Begin GDPR Tool Install

3. Select the folder you want to install the GDPR Tool to then click **Next**. If you prefer to leave it in the default location, click **Next**.

4. Click **Install**.

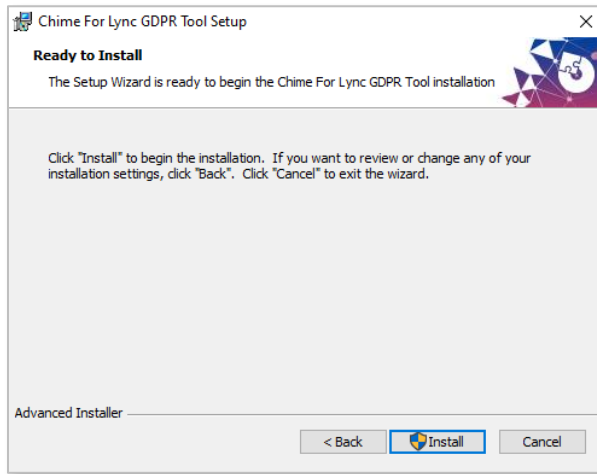


Figure 2: Install the GDPR Tool

5. Once the Installer completes the setup, click **Finish**.

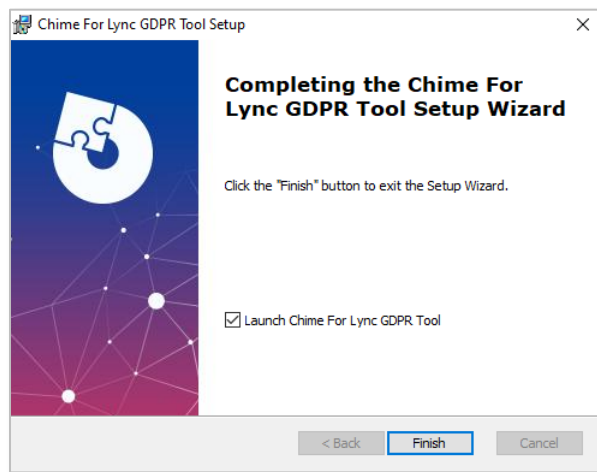


Figure 3: Finish Installing the Application

SETTING UP THE CHIME GDPR TOOL

SELECTING THE SETTINGS.XML FILE

Once the GDPR Tool is installed, you will need to connect the application to the Chime server that you want to perform GDPR operations on. You will need to select the settings.xml file for the Chime server to perform this operation.

1. Click the **Select File...** button.

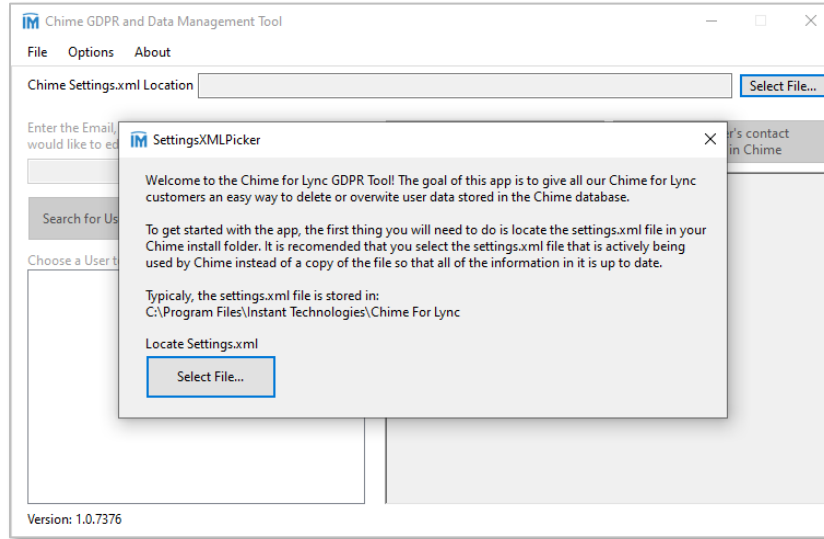


Figure 4: Initial State of the GDPR Tool

2. Navigate to and select the file location of the settings.xml file.
3. Click the **Open** button.

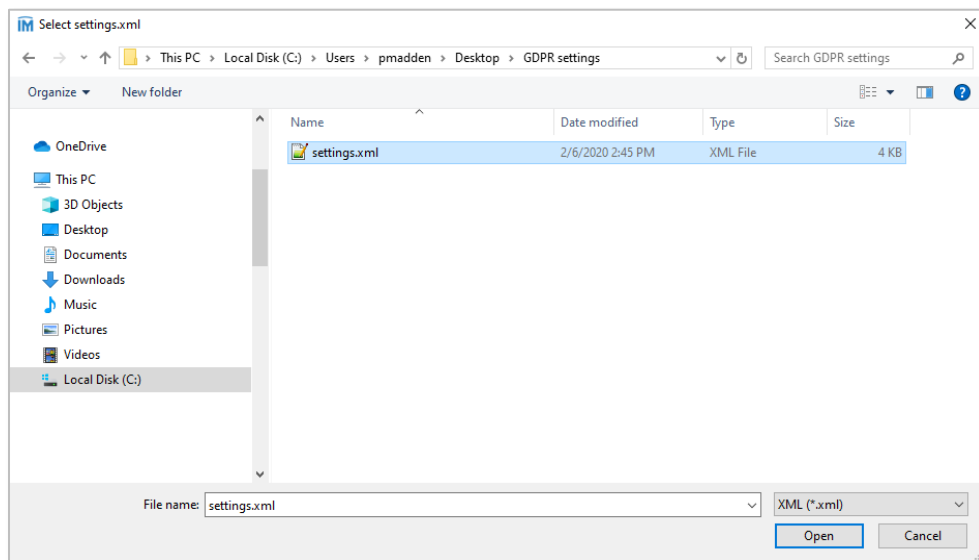


Figure 5: Select the Settings.xml file

Once the settings.xml has been picked, the app will notify you if the action has been successful. If it tells you that you are now connected to the Chime Database, you will then be allowed to enter in the name of the user you wish to perform GDPR actions on. If your settings.xml does not work however, there may be a problem. Feel free to contact support@instant-tech.com for assistance.

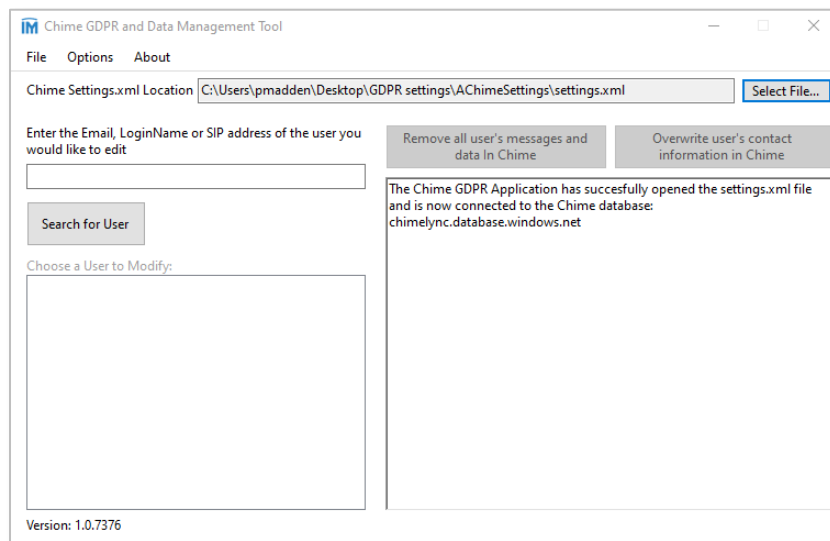


Figure 6: Chime Database Successfully Connected

Once the settings.xml has been chosen, it will be saved as the default settings file any time you reopen the application. If you want to choose a different settings file, you can click the **Select File...** button in the top right of the application, or choose the Chime settings.xml from the File menu.

FILE AND OPTIONS

After you have set the settings.xml file the **File** and **Options** menu items will be useful to view and configure the settings for the GDPR application.

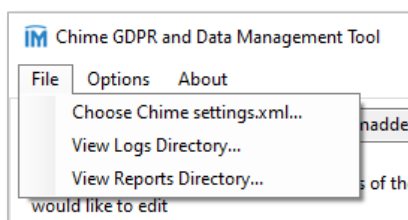


Figure 7: File Menu

The **File** menu gives you access to three different actions to manage the GDPR tool and review logs and reports

- **Choose Chime settings.xml:** Opens a file dialogue that allows you to pick a new settings.xml file that the GDPR Tool will use to connect to the Chime Database the settings file points to.
- **View Logs Directory:** Opens up a new File Explorer that points to the current location that you have saved as your log file directory.
- **View Reports Directory:** Opens up a new File Explorer that navigates to the current location that you have saved as your reports directory.

The **Options** menu gives you access to two different actions to manage the settings GDPR tool:

- Reporting and Logging...
- Message Deletion

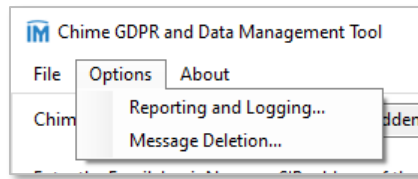


Figure 8: Options Menu

OPTIONS FORM

The options form allows you to modify settings within the GDPR Tool such as the locations of the logs and reports locations and the option to automatically have reports generate in the specified directory.

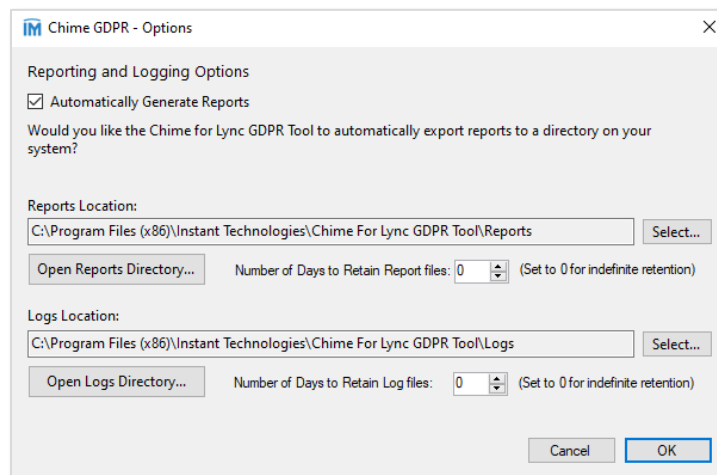


Figure 9: Options Form

Note: If you click cancel, or close the form while modifying any of the settings mentioned below, any changes you have made will be reverted and lost. Click the **OK** button after making changes to save and close the form.

Automatically Generate Reports:

If you would like reports to be generated for any of the GDPR actions that are performed while using this tool (or any remote actions) check the **Automatically Generate Reports** checkbox in the options form. Otherwise, you will be prompted if you want a report generated for any GDPR action that you perform.

Reports Location:

The options form shows you the current directory path you have set for your reports location. If you would like to change this location, simply click the **Select...** button and select the directory path of the folder you would like to use for the reports. **Note:** this chooses the default location of the reports, if you choose to leave the automatic generation setting unchecked you will still be able to choose a custom path for each report that you create.

Below the Reports Location, you are also able to choose the number of days to retain reports in the Reports Directory. If you would like reports to never be deleted from that directory, you can set that number to 0.

Logs Location:

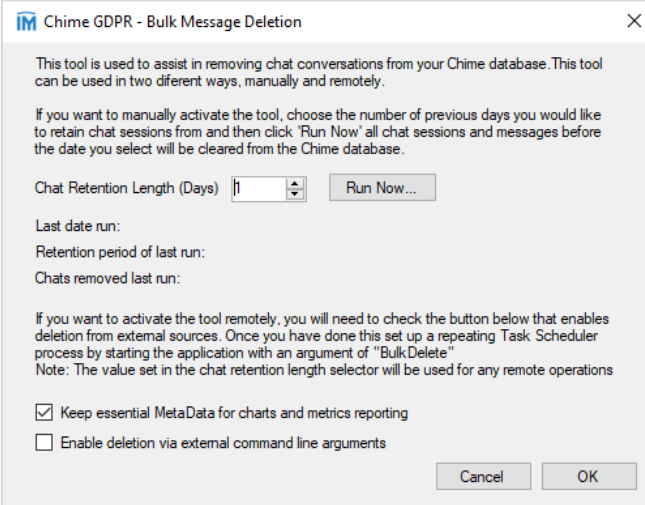
The options form shows you the current location you have set for your logs to generate. If you would like to change this location, simply click the **Select...** button and select the directory path of the folder you would like to use for the Log files.

Below the Logs Location, you are also able to choose the number of days to retain reports in the Logs Directory. If you would like logs to never be deleted from that directory, you can set that number to 0.

BULK MESSAGE DELETION

The Bulk Message Deletion is a feature for the Chime GDPR Tool that allows you to remove all of the messages from the Chime database before the specified retention period. In this form you are able to select the number of Chat Retention Days as well as if the feature can be run from a command line argument.

Note: If you click cancel, or close the form while modifying any of the settings mentioned below, any changes you have made will be reverted and lost. Click the **OK** button after making changes to save and close the form.



Chime GDPR - Bulk Message Deletion

This tool is used to assist in removing chat conversations from your Chime database. This tool can be used in two different ways, manually and remotely.

If you want to manually activate the tool, choose the number of previous days you would like to retain chat sessions from and then click 'Run Now' all chat sessions and messages before the date you select will be cleared from the Chime database.

Chat Retention Length (Days) 11 Run Now...

Last date run:
Retention period of last run:
Chats removed last run:

If you want to activate the tool remotely, you will need to check the button below that enables deletion from external sources. Once you have done this set up a repeating Task Scheduler process by starting the application with an argument of "Bulk.Delete"
Note: The value set in the chat retention length selector will be used for any remote operations

Keep essential MetaData for charts and metrics reporting
 Enable deletion via external command line arguments

Cancel OK

Figure 10: Bulk Message Deletion Form

Chat Retention Length:

This feature allows you to set the chat retention length for the application. The number you choose here will be the number of days you wish to keep chat sessions for. If you click the **Run Now...** button you will be performing a bulk message delete action. This is not a test and it will permanently remove messages from any chat sessions outside of the retention period. If you want to test this feature, we recommend you use a test server to perform the test on, or make a copy of the Chime database that you won't mind having data removed from.

Keep essential MetaData for charts and metrics reporting:

Checking this will cause the GDPR Tool to go through the meta data and keep in fields that are useful for our charting and reporting. These fields include: skillTags, Session ID, Session GUID, Queue, and ID.

Enable deletion via external command line arguments:

This aspect of the feature will be covered more in a future section detailing how to set up the feature with Task Scheduler. This setting must be checked for this feature to work, otherwise the task will fail.

OVERWRITE/REMOVE CHIME USER

The main feature of the GDPR Tool is the ability to either remove or overwrite all data for a specific user from the Chime Database. To begin this, you must have first connected the application to the database by selecting the settings.xml file of the chime server you wish to modify.

CHOOSING A CHIME USER

After connecting to the Chime Database, you are now able to search for a user that you want to perform GDPR actions on.

1. Type in the name of the user you want to edit in the Text box in the middle of the application window.

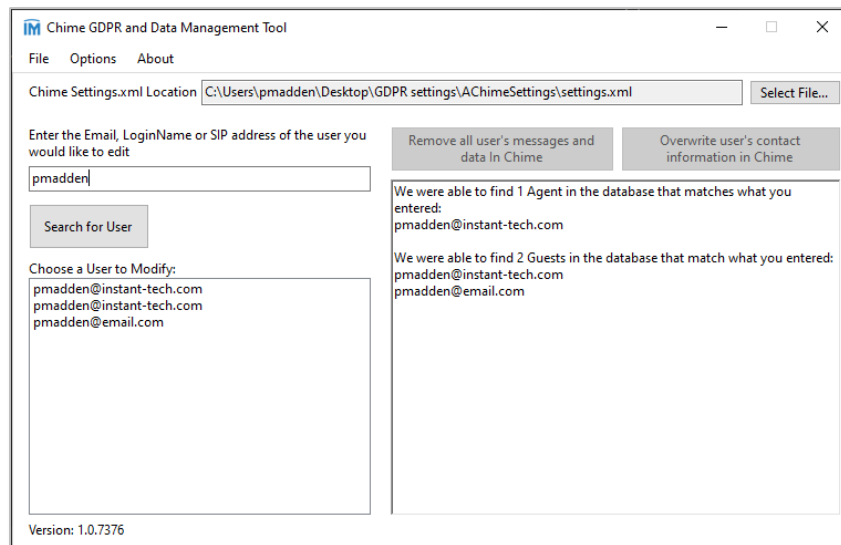


Figure 11: Search for Chime Users

2. Click the **Search for User** button.
3. Select the user you want to edit in the list of users that appear. When you click on a user to edit, details about this user will appear in the textbox to the right such as first name, last name, email, user role. Users are stored in the database.

Note: The same user might have multiple entries in the list if they are registered as an Agent and a Guest. Additionally, users that might come in with different emails may show up as multiple entries.

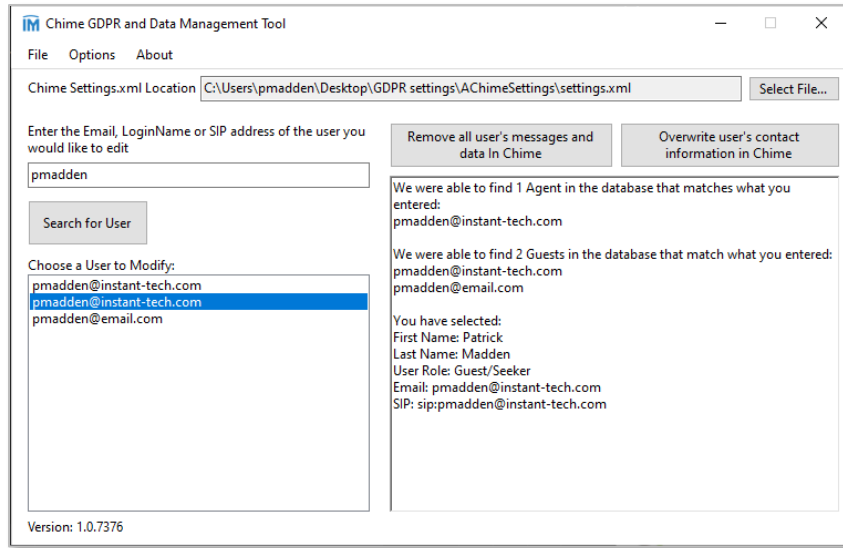


Figure 12: Chime Users Available to Modify

4. Choose the GDPR operation that you would like to perform on the Chime user:

Remove All User's Data In Chime:

This option will redact all contact information in Chime about the user you are performing this action on. Their name, email, login name, etc... will all be removed from Chime, and any that they were in will have their names redacted and any chat information and meta data will be deleted

Overwrite Contact Information In Chime:

This option will redact all information in Chime about user you are performing this action on. Their name, email, login name, etc... will all be removed from Chime, and any chats that they were in will have their messages redacted and any chat information and meta data will be deleted

5. Click the button for the option you wish to perform.

- Confirm that you would like to perform this action. Click the **Yes** button.
Note: This action can not be undone, once you perform one of these GDPR operations on a Chime user their data will not be recoverable, and they will be displayed as 'Redacted Agent' or 'Redacted Guest' in all of the Chime UI and in the Database.

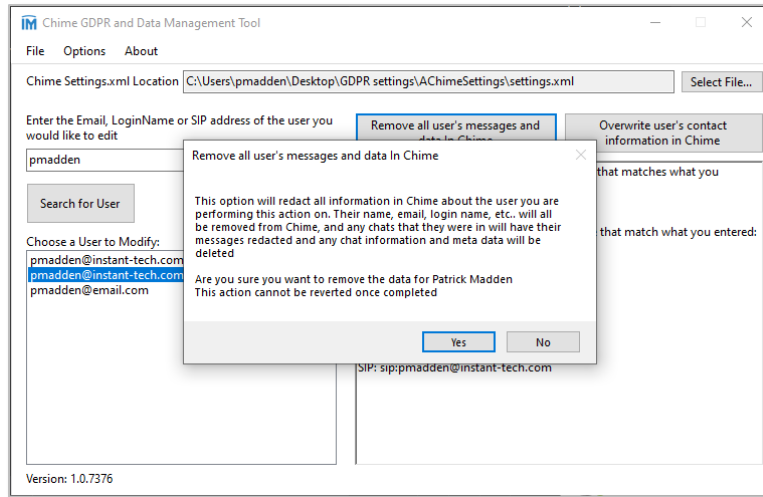


Figure 13: Remove all Chime Users Date

EXPORT OPERATIONS TO CSV

Once you have initiated the GDPR operation, you will be prompted if you want to export the results of the action to a CSV file. The report will give you information such as what user the GDPR Tool has modified, (name, email, user role, modification type), number of sessions edited, messages edited, comments edited, personal info removed etc...

- Click **Yes**

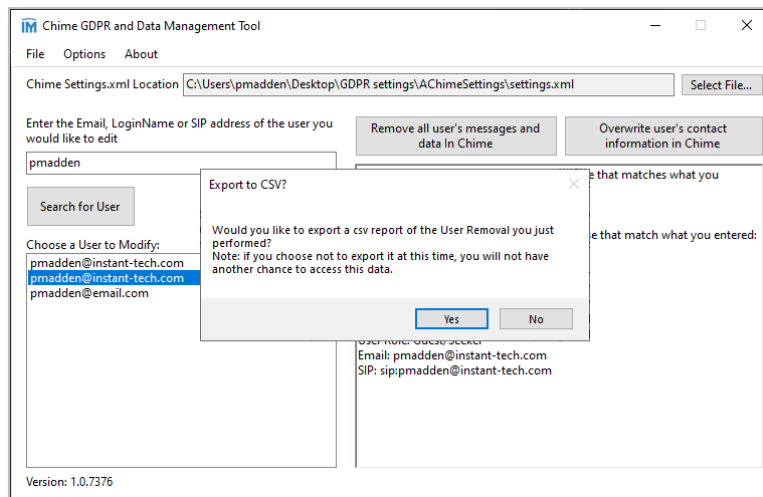


Figure 14: Export to CSV

2. Choose the file directory location where you want the report to be saved to.

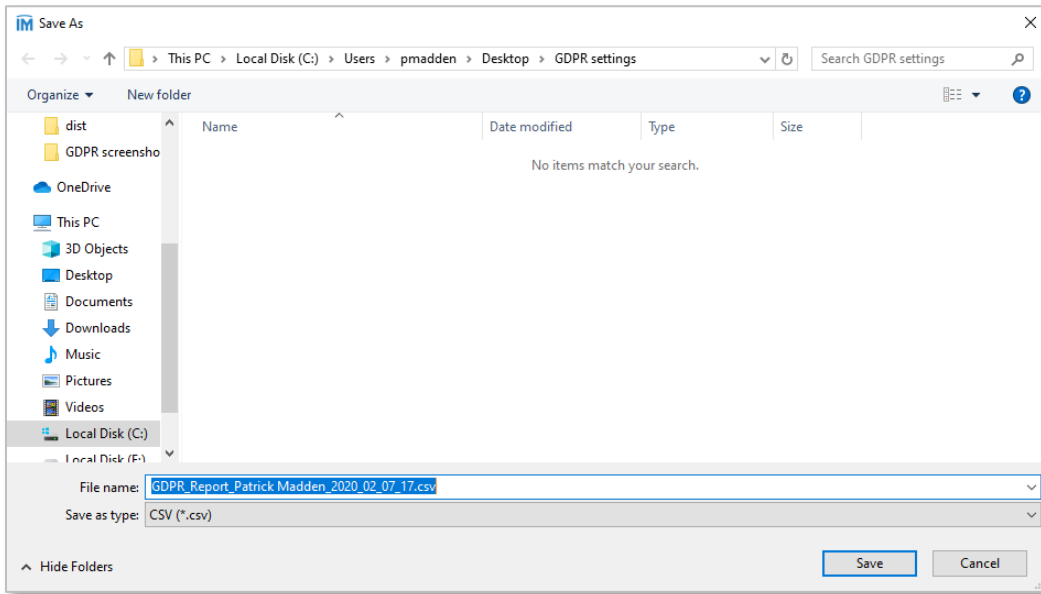


Figure 15: Choose Where to Save the Report

3. You will receive a message saying that the user has been removed/overwritten from the Chime Database.

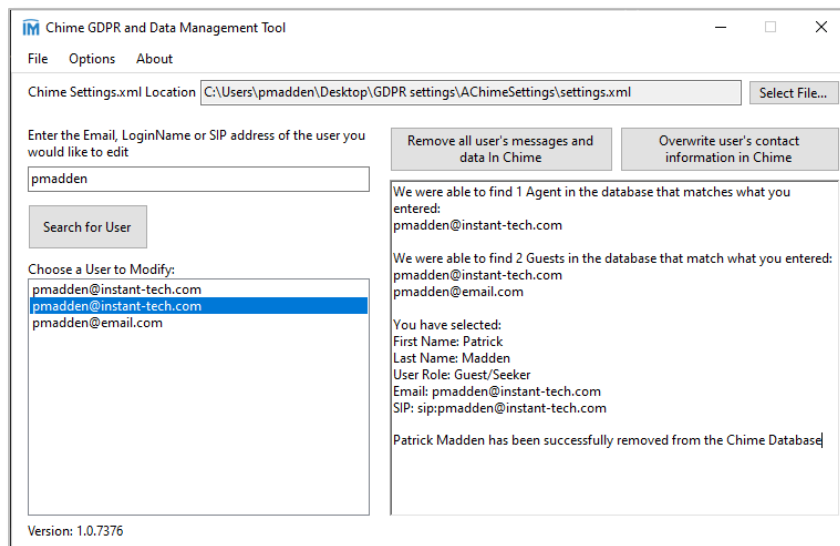


Figure 16: Chime User Removed from the Database

- Open up the report from the GDPR operation from the location it was saved. Perform any actions with this such as adding it to records, providing it to the GDPR user etc...

The screenshot shows an Excel spreadsheet titled "GDPR_Report_Patrick Madden_2020_03_12_40.csv". The data is organized into columns A through G and rows 1 through 33. The report content is as follows:

	A	B	C	D	E	F	G
1	Chime Bulk Delete Reporting:						
2							
3	Timing Statistics:						
4	App Opened	3/12/2020 10:13:39 AM					
5	Removal Started	3/12/2020 10:40:10 AM					
6	Removal Ended	3/12/2020 10:40:33 AM					
7	Time Elapsed (min:sec:mili)	00:23:391					
8							
9	This Report Has Been Run For:						
10	ADName	pmadden					
11	Email	pmadden@instant-tech.com					
12	First Name	patrick					
13	Last Name	madden					
14	Sip Address	sjp:pmadden@instant-tech.com					
15	User Role	Guest					
16	User Modification Performed	Remove All User Data					
17	Summary of Actions Performed:						
18	Sessions Edited		31				
19	Messages Edited		145				
20	Chat Room Messages Edited		0				
21	Alerts Edited		1				
22	Comments Edited		31				
23	Personal Info Removed		209				
24	Queues Removed		0				
25	Recipients Removed		0				
26							
27							
28							
29							
30							
31							
32							
33							

Figure 17: Chime GDPR Tool Report

SET UP BULK MESSAGE DELETION WITH TASK SCHEDULER

GDPR APPLICATION SETUP

If you want to set up the bulk message deletion to run on a schedule, you will need to configure it so that it can be run remotely from a service such as Task Scheduler. To get the application ready for this setup you will need to first configure the options to allow this feature to work as intended.

1. Navigate to **Options → Bulk Message Deletion**. This will open up the bulk message deletion form.

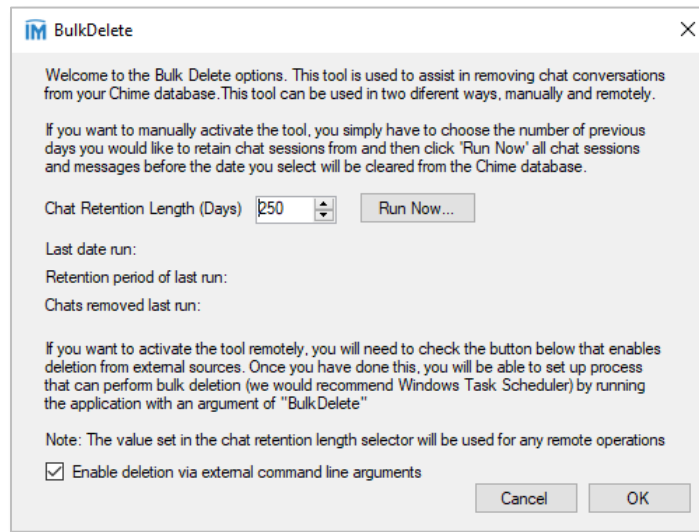


Figure 18: Message Deletion Settings

2. Select the number of days you want to retain chat messages for.
3. Check of the setting labeled 'Enable deletion via external command line arguments'
4. Click the **OK** button to save the settings.

CREATE A TASK

Now that the GDPR application is configured, you can start setting up a task to run the Message deletion on a scheduled interval.

1. Open up Task Scheduler

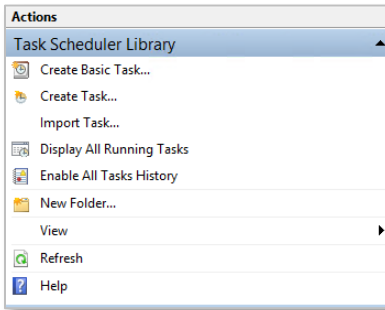


Figure 19: Create Task

2. Click **Create Task...** on the right side of the program.

GENERAL

3. Name your task something so that it is easily identifiable as the GDPR message deletion task.
Ex: GDPR Bulk Message Deletion.
4. Give the task a description that describes what it does and how often you will have it run.

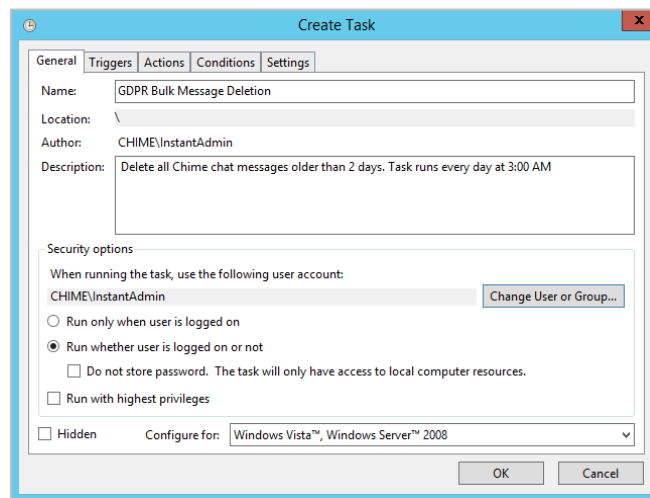


Figure 20: Create Task - General

5. Set the task to **Run whether user is logged in or not**

TRIGGERS

6. Click the Triggers tab to move to the next section
7. Click **New...**

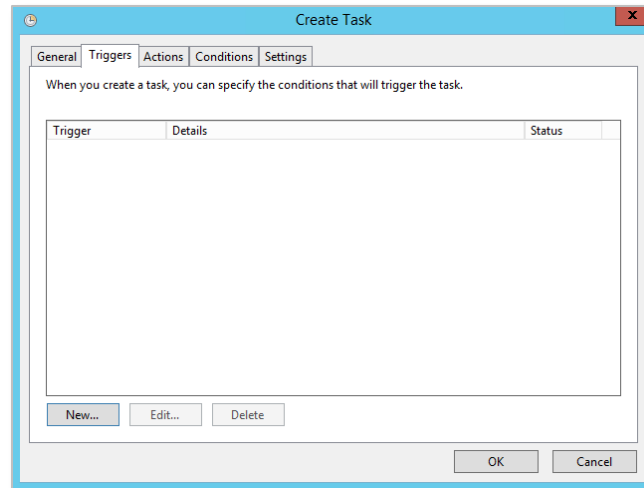


Figure 21: Create New Trigger

8. In the 'Begin the task' dropdown, select the 'On a schedule' option
9. Here you can choose how often you want it to run (once, daily, weekly, monthly)
10. Select what date and time you want it to run for the first time and how often you want it to occur. The time you choose here will be the time it runs every time in the future.

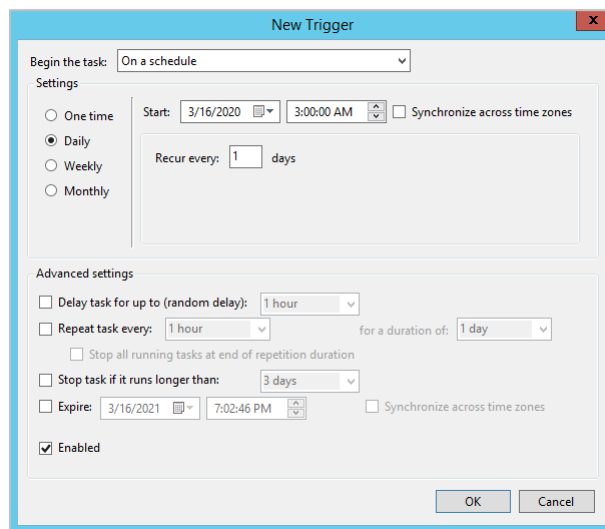


Figure 22: Set Schedule

11. In 'Advanced settings', choose if you want to use any of the settings. If you would like to run the app in hour intervals instead of day intervals check off 'Repeat task every:' and set the time to how often you want it to repeat and set the duration to indefinite.
12. Additionally make sure 'Enabled' is checked.
13. Once you have completed setting this up. Click the **OK** button.

ACTIONS

14. Click on the Actions Tab.

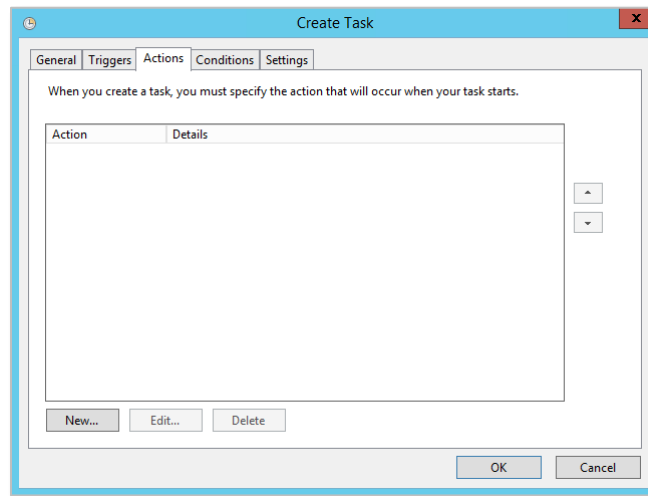


Figure 23: Pick New Action

15. Click **New...**

16. In the 'Action' dropdown, choose Start a program

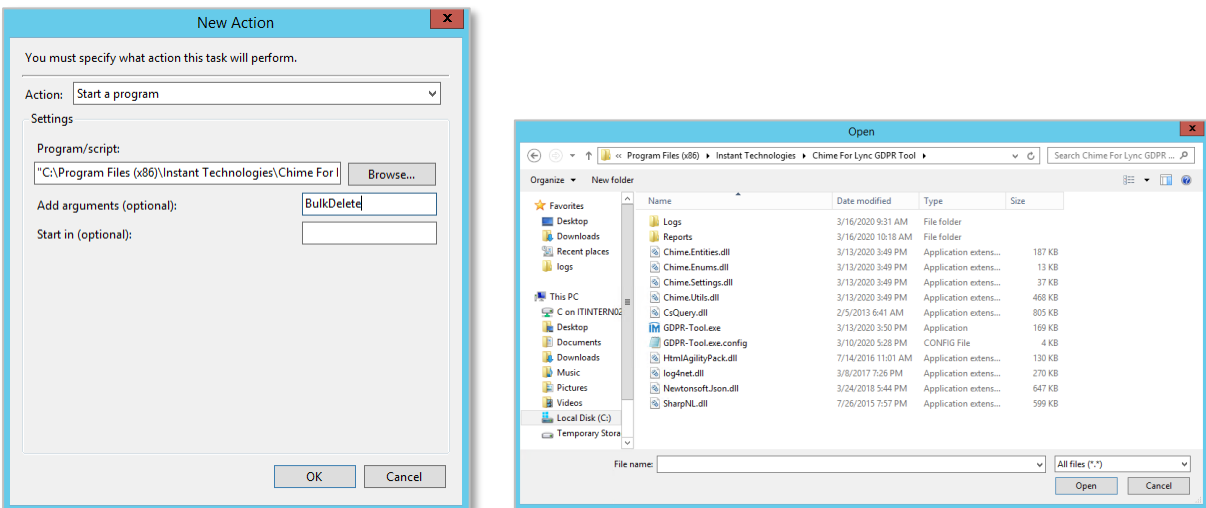


Figure 24: Create New Action

17. Click **Browse...**

18. Select the GDPR-Tool.exe application file (by default it is in C:\Program Files (x86)\Instant Technologies\Chime For Lync GDPR Tool)

19. In the 'Add arguments(optional)' text box, write 'BulkDelete'

20. Click **OK**.

CONDITIONS AND SETTINGS

21. Click the Conditions tab.
22. If any of the settings here are applicable to your deployment method, configure them as you like.

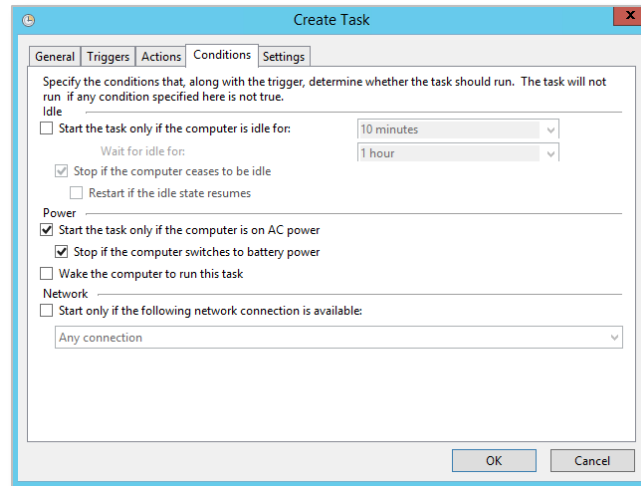


Figure 25: Conditions Tab

23. Click the Settings tab.
24. If you would like the ability to run the task manually in addition to the schedule, check the setting 'Allow task to be run on demand'
25. Check 'Run task as soon as possible after a scheduled task is missed'
26. Check the 'Stop the task if it runs longer than:' setting and choose how many hours you want to stop after. (Be aware, the application can delete up to about 200,000 messages in an hour, so if you need to delete more than that, set tis setting accordingly)

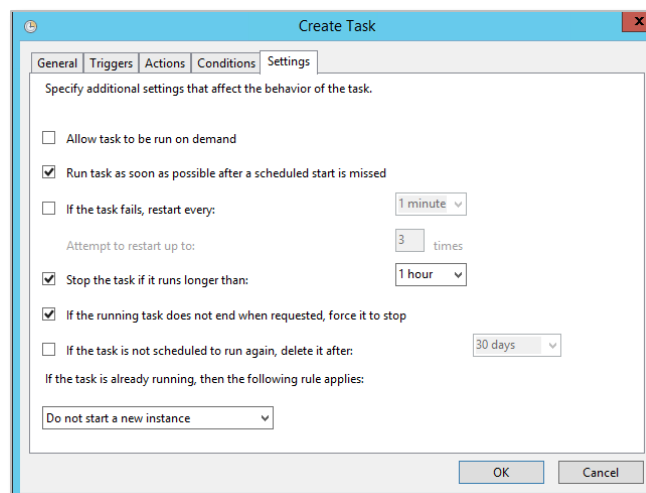


Figure 26: Settings Tab

27. Check the setting 'If the running task does not end when requested, force it to stop.'
28. Click **OK**, this will create the task.

29. Your Task should be set up correctly. If you enabled the manual task run feature, you will be able to run the task right away if you want. Otherwise, make sure the task is enabled, and then wait for the time you chose in the triggers settings to pass.

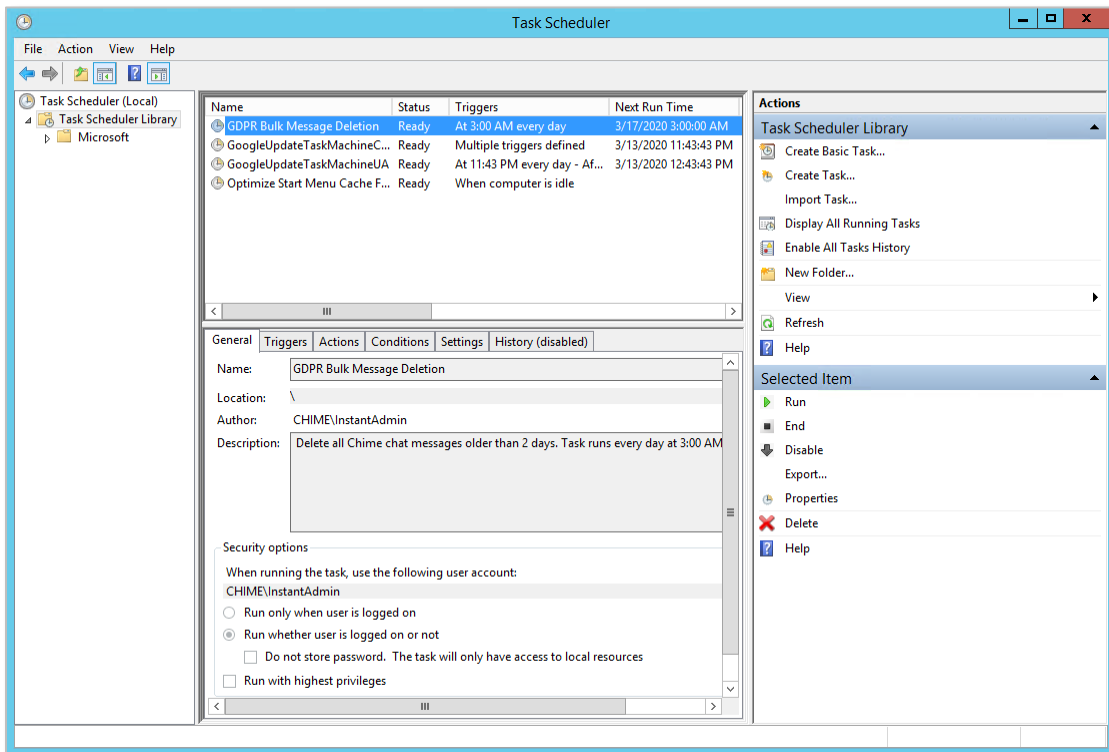


Figure 27: Completed Task Setup