



## Admin Guide

Fall 2016

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# CHIME ADMIN 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 XMPP, Microsoft Active Directory, Microsoft SQL Server, IBM DB2, Microsoft Lync, 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](mailto: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 (now referred to 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. Each queue also includes a 'dispatcher' which is an IM entity that will monitor the presence of the agents, route IM requests to the agents using IM, and broker all queue activity using the IM layer.

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

## FIRST STEPS

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.

## XMPP DEPLOYMENT:

If Chime is deployed against XMPP, then you will be prompted for your XMPP credentials:

After logging in, you will see what is called the System Dashboard page. This page gives users high-level information about all the active chat queues that you have configured. The next step is to configure your first queue.



The image shows the Chime web login interface. At the top left is the CHIME logo, and at the top right is a 'Log In' link. The main content area is a light gray box with a title 'Chime Log In'. Below the title are two input fields: 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. At the bottom of the page, there is a footer containing contact information: a phone number '1(800)884-0443', an email 'support@instant-tech.com', build information 'Build: v0.1.945-125.20140923', and a copyright notice '© 2014 - instant' with the Instant Technologies logo.

Figure 2: Chime Web 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 connect experts with seekers
3. Add agents, or groups, into the new queue

To start configuring queues, go to the Admin section using the navigation at the top of the page.

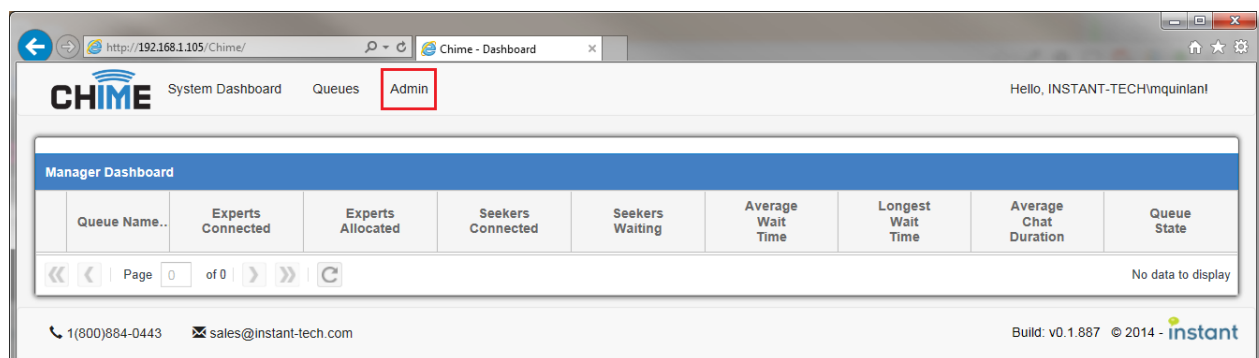


Figure 3: First look at Chime

## 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.

First Name	Last Name	ID	E-mail	Max/Day	Max Concurrent	Role	
Bornita	12	b12@in.instant-tech.com	b12@in.instant-tech.com	150	3	Agent	
Rolene	Abraham	rolene369@in.instant-tech.com	rolene369@in.instant-tech.com	83	2	Agent	
Vincent	Adams	vincent adams	Vincent Adams	0	2	Admin	
Seema	Adoni	seadoni3@in.instant-tech.com	seadoni3@in.instant-tech.com	75	3	Agent	
Nada	Atify	NADAA@eg.instant-tech.com	NADAA@eg.instant-tech.com	75	3	Agent	
Shyam	Akella	shyam.akella@in.instant-tech.com	shyam.akella@in.instant-tech.com	75	3	Agent	
Mohammed	Akram	mohakram@in.instant-tech.com	mohakram@in.instant-tech.com	75	3	Agent	
Syed Moha...	Ali	syemali3@in.instant-tech.com	syemali3@in.instant-tech.com	75	3	Agent	
Husna	Amanulla	hamanull@in.instant-tech.com	hamanull@in.instant-tech.com	150	3	Agent	
Diya	Amati	diya amati	Diya Amati	0	2	Admin	
Mohamed	Amr	MOHDAMR2@eg.instant-tech.com	MOHDAMR2@eg.instant-tech.com	150	3	Agent	

Figure 4: People Grid

## ADDING A PERSON

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

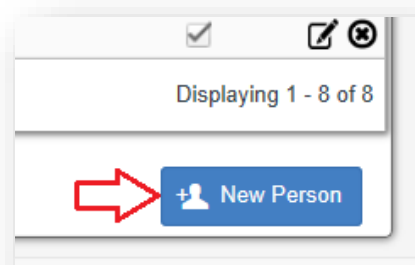


Figure 5: Adding a new person

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

A screenshot of a 'New Person' configuration window. The window has a title bar with a close button. Inside, there's a camera icon with a red question mark. To the right of the icon are two text input fields: 'First Name' and 'Last Name'. To the right of 'Last Name' is a checkbox labeled 'Administrator'. Below these are two more text input fields: 'Enter ID' and 'Enter email'. Further down are two dropdown menus: 'Account Type' (set to 'Testing') and 'Platform Type' (set to 'Sametime'). Below these are two more dropdown menus: 'Max/day' (set to '0') and 'Max concurrent' (set to '2'). A note below the 'Max/day' dropdown says 'Leave as '0' for no restriction'. At the bottom right are two buttons: 'Close' and 'Save changes'.

Figure 6: 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.

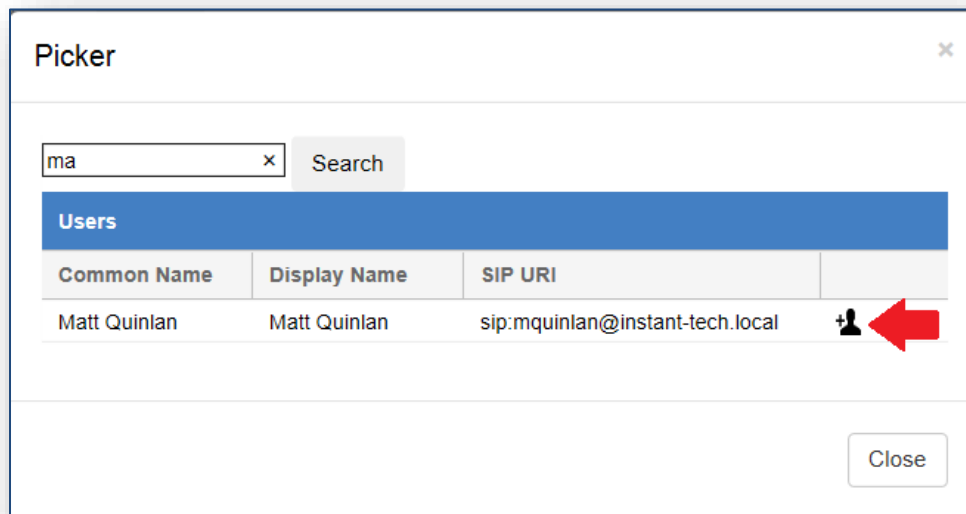


Figure 7: Selecting a user from the directory picker

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 at a queue level

**ID:** The XMPP User ID or 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)

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.

---

## 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

In order to connect people, Chime needs to use a Dispatcher to broker the conversation. The dispatcher needs an 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.

**ID:** The XMPP User ID or SIP address for the dispatcher

**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

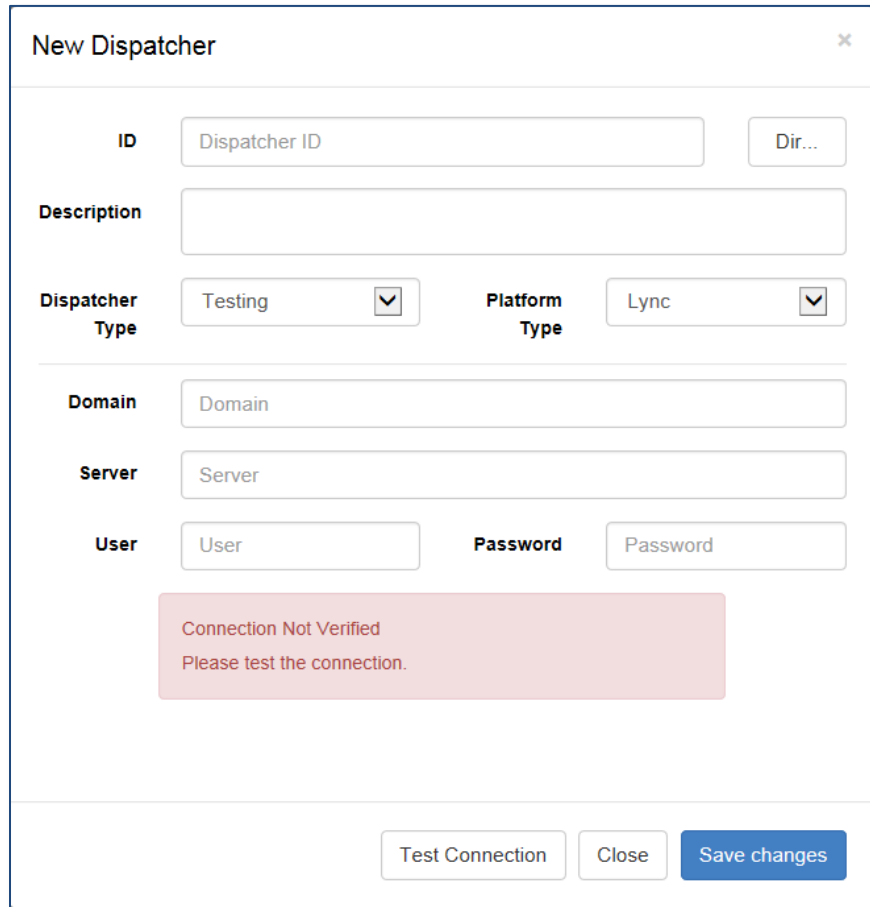
**Server:** Address of the chat server (XMPP) that Chime will log in to.

**User:** User name to use when logging into the chat server

**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.



The image shows a 'New Dispatcher' dialog box with the following fields and controls:

- ID:** A text input field containing 'Dispatcher ID' and a 'Dir...' button.
- Description:** A large text input field.
- Dispatcher Type:** A dropdown menu with 'Testing' selected.
- Platform Type:** A dropdown menu with 'Lync' selected.
- Domain:** A text input field containing 'Domain'.
- Server:** A text input field containing 'Server'.
- User:** A text input field containing 'User'.
- Password:** A text input field containing 'Password'.


A red error message box is displayed below the User and Password fields, containing the text: 'Connection Not Verified' and 'Please test the connection.'

At the bottom of the dialog, there are three buttons: 'Test Connection', 'Close', and 'Save changes'.

Figure 8: Chime Dispatcher Settings

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## 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.

For Example, a dispatcher configured for XMPP will need to include the XMPP server, username, and the password for the dispatcher. Instant Chime will 'connect' with the Jabber server using port 5222 and provides the ability to connect with 'on premise' XMPP servers.

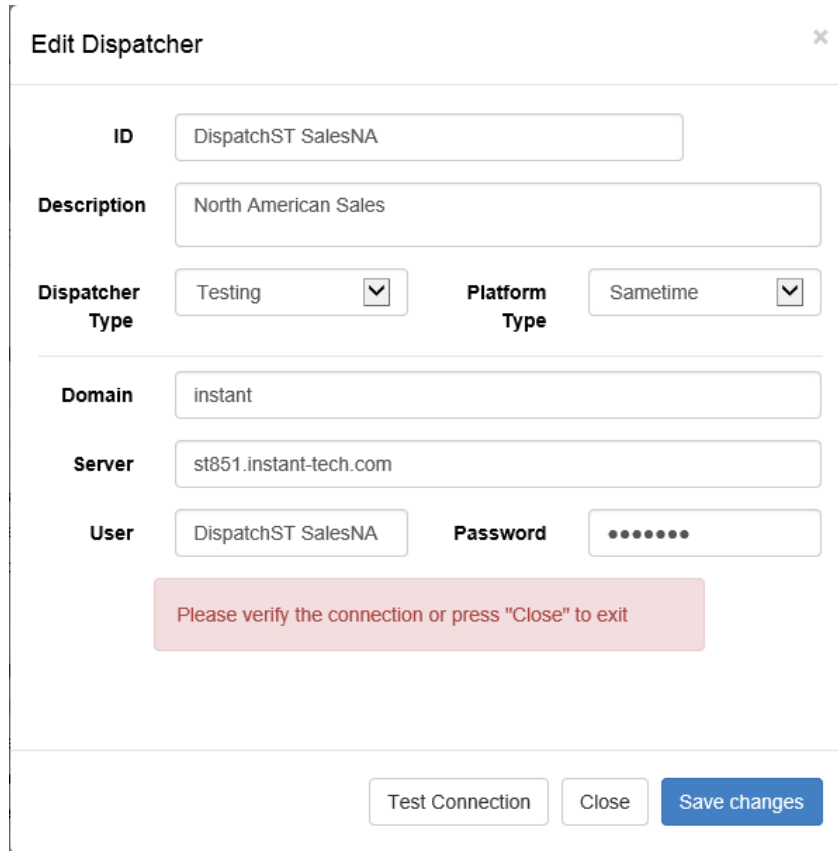



Figure 9: Chime Edit Dispatcher Settings

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## 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.

## 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

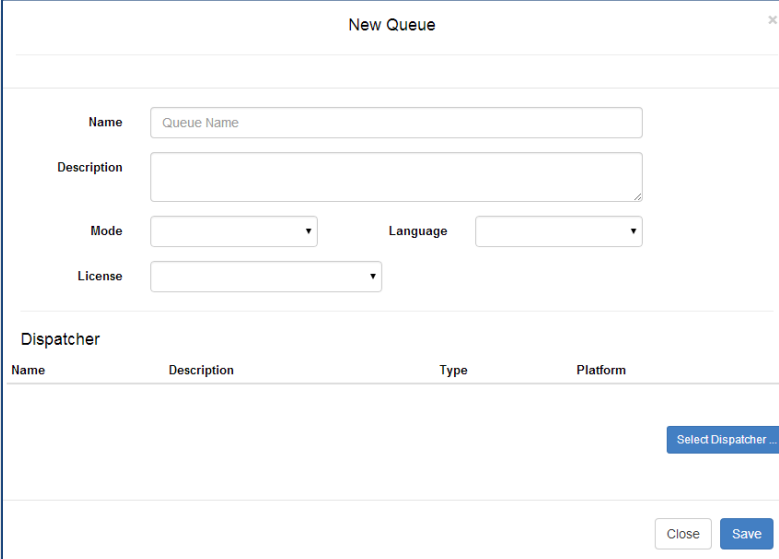
**Description:** A more specific description of the queue, if needed

**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 image shows a 'New Queue' dialog box with the following fields and controls:

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

Figure 10: New Queue Settings

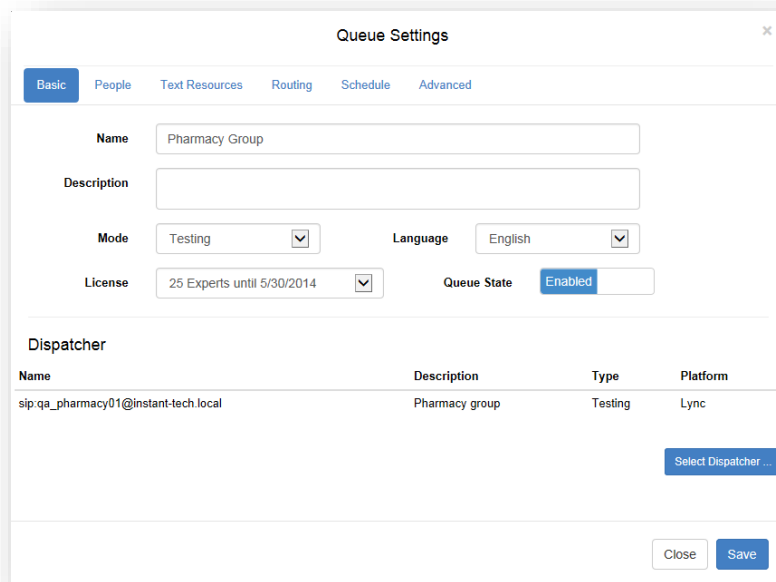
Click **Save** to create the new Queue.

## 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  icon for the queue in the queue grid. This will open queue settings window.

### 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 'Queue Settings' window displays the 'Basic' tab with the following fields and controls:

- Name:** Pharmacy Group
- Description:** (empty text box)
- Mode:** Testing (dropdown menu)
- Language:** English (dropdown menu)
- License:** 25 Experts until 5/30/2014 (dropdown menu)
- Queue State:** Enabled (toggle button)

**Dispatcher**

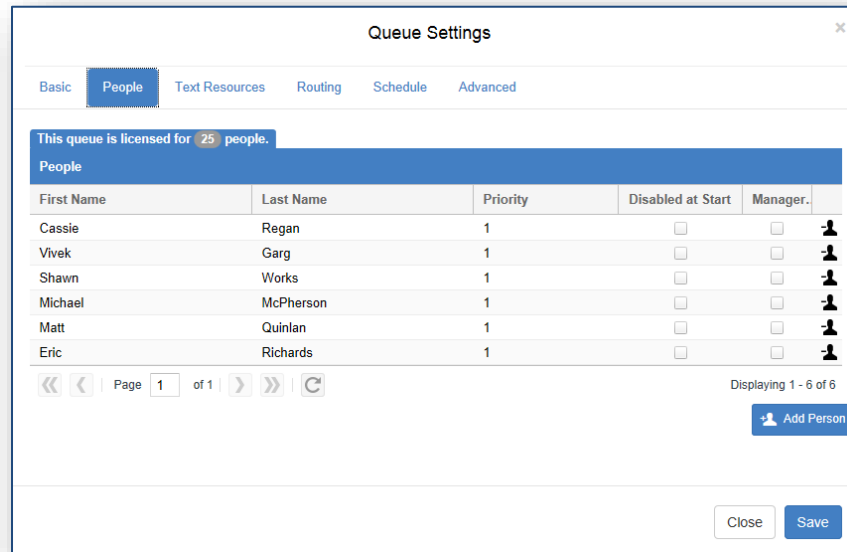
Name	Description	Type	Platform
sip:qa_pharmacy01@instant-tech.local	Pharmacy group	Testing	Lync

Buttons: Select Dispatcher ..., Close, Save

Figure 11: Basic Queue Settings

## PEOPLE

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

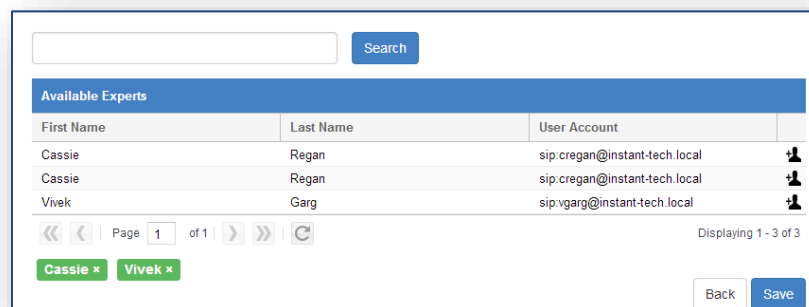


The screenshot shows the 'Queue Settings' window with the 'People' tab selected. At the top, it states 'This queue is licensed for 25 people.' Below this is a table of people in the queue. The table has columns for First Name, Last Name, Priority, Disabled at Start, Manager, and a person icon. The data rows are: Cassie Regan (Priority 1), Vivek Garg (Priority 1), Shawn Works (Priority 1), Michael McPherson (Priority 1), Matt Quinlan (Priority 1), and Eric Richards (Priority 1). Below the table is a pagination control showing 'Page 1 of 1' and 'Displaying 1 - 6 of 6'. There is an 'Add Person' button and 'Close' and 'Save' buttons at the bottom right.

First Name	Last Name	Priority	Disabled at Start	Manager	
Cassie	Regan	1	<input type="checkbox"/>	<input type="checkbox"/>	
Vivek	Garg	1	<input type="checkbox"/>	<input type="checkbox"/>	
Shawn	Works	1	<input type="checkbox"/>	<input type="checkbox"/>	
Michael	McPherson	1	<input type="checkbox"/>	<input type="checkbox"/>	
Matt	Quinlan	1	<input type="checkbox"/>	<input type="checkbox"/>	
Eric	Richards	1	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 12: 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 directory picker window. At the top is a search bar with a 'Search' button. Below is a table titled 'Available Experts' with columns for First Name, Last Name, User Account, and a person icon with a plus sign. The data rows are: Cassie Regan (sip:cregan@instant-tech.local), Cassie Regan (sip:cregan@instant-tech.local), and Vivek Garg (sip:vgarg@instant-tech.local). Below the table is a pagination control showing 'Page 1 of 1' and 'Displaying 1 - 3 of 3'. There are two green badges at the bottom left: 'Cassie x' and 'Vivek x'. There are 'Back' and 'Save' buttons at the bottom right.

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 13: Selecting users from the picker

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

**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.

**Disabled at Start:** This would set an expert to be disabled from the queue when they first log in for the day.

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



## 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 'Seeker Text' section is active, showing a list of text resources with edit icons. The resources include: Welcome Message, Temporary Welcome Message (currently OFF), Searching for Person, Connected Message, No Person Available, Chat Ended, and Transferred Message. Each resource contains a default message template with system variables like {QueueName}, {SeekerAverageWaitTime}, {SeekerFullName}, {ExpertFullName}, {TransferFrom}, and {TransferTo}.

Text Resource	Default Message
Welcome Message	Welcome to Queue Manager. You are in the {QueueName} Queue. The average wait time in this queue is {SeekerAverageWaitTime} seconds. Please state your request while I locate an expert for you.
Temporary Welcome Message	This Queue is currently under maintenance, please try again later.
Searching for Person	Please wait, {SeekerFullName} while I locate an expert for you. Thank you for your patience.
Connected Message	Expert {ExpertFullName} has accepted your request.
No Person Available	Unfortunately, there are no experts available at this time. Please come back at another time.
Chat Ended	Expert {ExpertFullName} has closed their chat session.
Transferred Message	You have just been transferred from the {TransferFrom} Queue to the {TransferTo} Queue by {ExpertFullName}.

Figure 14: 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 **Expert 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.

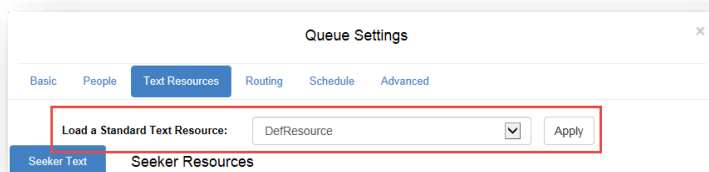



Figure 15: Apply Standard Text Resource

## CUSTOMIZING A TEXT RESOURCE

To edit a specific text resource, click the  icon to open the text resource editor. 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.

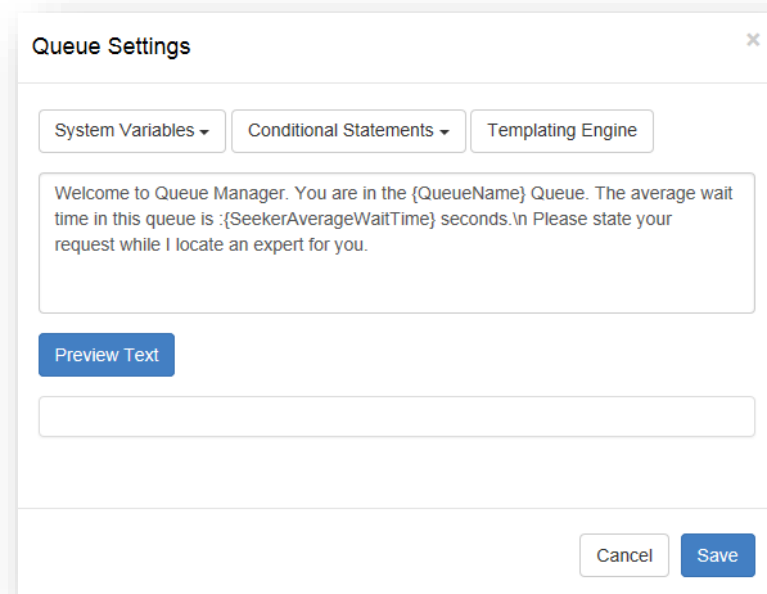


Figure 16: Editing a Text Resource

Once you are satisfied with the text you've edited, click **Save** to close the text editor and apply the customized text.

## 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

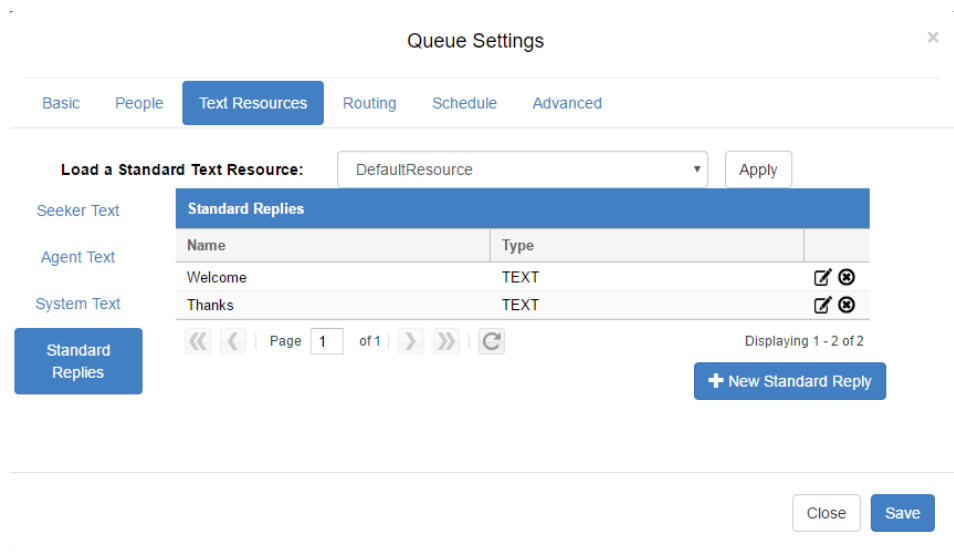
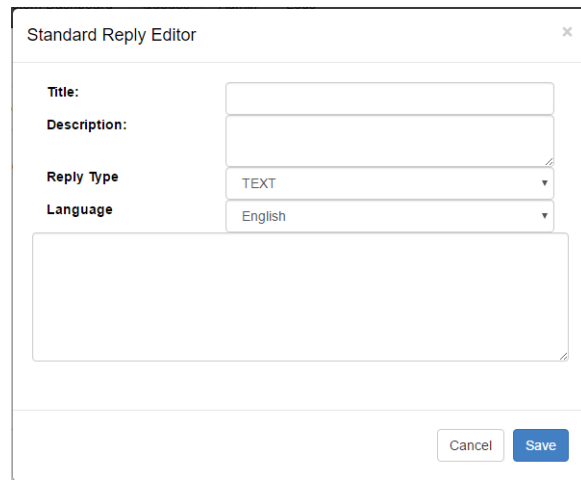


Figure 17: Standard Replies

3. Click on the New Standard Reply button. This will bring up the Standard Reply editor.
4. Type in a Title and description 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
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 Save when you are finished creating the new standard reply



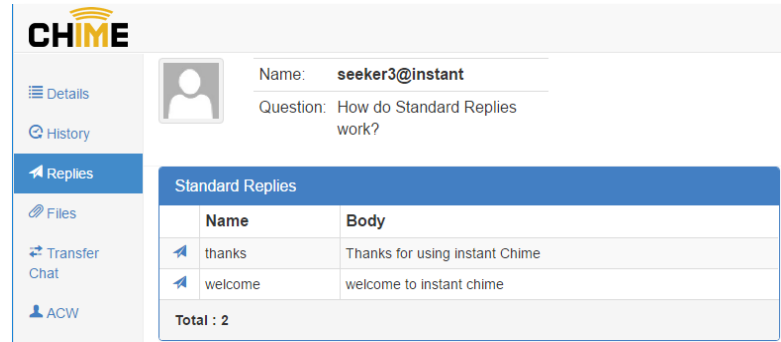
The Standard Reply Editor dialog box contains the following fields and controls:

- Title:** A text input field.
- Description:** A text input field.
- Reply Type:** A dropdown menu with "TEXT" selected.
- Language:** A dropdown menu with "English" selected.
- A large text area for the reply content.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Figure 18: Standard Reply Editor

## USE A STANDARD REPLY

- When connected to a seeker, click the link that brings up the agent context window.
- Navigate to the “Replies” section, which will list all the replies that have been created for a queue.




The Agent Context Window displays the following information:

- CHIME** logo and navigation menu (Details, History, Replies, Files, Transfer Chat, ACW).
- Seeker Information:**
  - Name: seeker3@instant
  - Question: How do Standard Replies work?
- Standard Replies Table:**

	Name	Body
🚩	thanks	Thanks for using instant Chime
🚩	welcome	welcome to instant chime
Total : 2		

Figure 19: Agent Context Window

- Click the  button to send a standard reply, which will display in the seekers window as either a video or just text (depending on what type of standard reply it is).

## 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**
  - Get customer request before locating an agent**: ☒
  - Send the periodic wait message every seconds**:   
(Should be less than Seeker Timeout time)
  - Routing Method**:
  - Accept Timeout (seconds)**:   
Default is 30
  - Seeker Timeout (seconds)**:   
Default is 5 minutes (300 seconds)

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

Figure 20: Queue Routing Settings

### GET CUSTOMER REQUEST BEFORE LOCATING AN AGENT

This option controls what happens initially when a seeker enters the queue. If this is left unchecked, the seeker will immediately start routing to an agent without entering their question. However, if the setting is checked off, the seekers will need to enter in a question before being routed to an agent. The Agent will be able to see the question the seeker is asking before they accept the chat as well.

### SEND THE PERIODIC WAIT MESSAGE EVERY SECONDS

This setting controls how often a message is sent to a seeker while they are being routed to an agent. The message lets them know they are still in the queue and are in the process of being routed to an agent.

## ROUTING METHODS

For all of the routing methods, Chime takes the following steps:

1. Get a list of all agents assigned in the queue
2. Of the agents assigned to a queue, which agents have an Available Jabber status
3. Of the Available agents, which agents are not at their Max Concurrent chat limit
4. Of “Not Max Concurrent” agents, which agents are not at their Max Chats Per Day
5. Of the “Not Max Chats Per Day” agents, which agents are not in the excluded list. The excluded list is made up of agents that have declined this chat session already, been set to “No Chats”, or disabled themselves from the queue.

After we get the list of agents that meet the above criteria, we then use the queue’s routing method to pick an agent to route the chat to.

### Hunt

When using the **Hunt** routing method, Chime takes the agents and looks at the total number of chats they have taken. The agent that has accepted the least amount of total chats is then routed to.

If that agent doesn’t accept the chat, the agent is put into the exclude list and the agent with the next lowest amount of total chats is then routed to.

All agents at Priority 1 are processed first, then Priority 2, Priority 3, and so on.

### Hunt (Skill Tag)

When using **Hunt (Skill Tag)** routing method, Chime will take the **Skill Tag** that is assigned to the seeker request and will choose an agent whose assigned skill tag matches.

If multiple agents have the matching skill tag, Chime will look at the available agent’s total number of chats before choosing an agent to route to.

If no agent is available that has the matching skill tag, Chime will route the chat based on the **Hunt** methodology.

Chime first searches through all the priority levels first in order to match an expert with the seeker’s problem tag. If a match isn’t found, Chime does a Hunt search by agent priority levels.

## Broadcast

When using the **Broadcast** routing method, Chime sends out a seeker request to all agents at priority level 1. All of these Agents are notified at the same time, and they all have the opportunity to accept the chat.

If no agent at priority level 1 picks up the chat request then all available agents at level 2 (& subsequently level 3) are notified at the same time for incoming seeker request.

## Broadcast (Skill Tag)

When using the **Broadcast (Skill Tag)** routing method, Chime sends out a seeker request to all agents at priority level 1 that have the skill tag assigned to them. All of these Agents are notified at the same time, and they all have the opportunity to accept the chat.

If no agent at priority level 1 picks up the chat request then all available agents at level 2 (& subsequently level 3) are notified at the same time for incoming seeker request. If no agents with the skill tag are available, Chime will route the chat based on normal Broadcast settings.

---

## ACCEPT TIMEOUT

This value is the amount of time an Agent has to accept an incoming chat. If the Agent does not accept the chat within the time limit set here, the seeker is re-routed to a different Agent

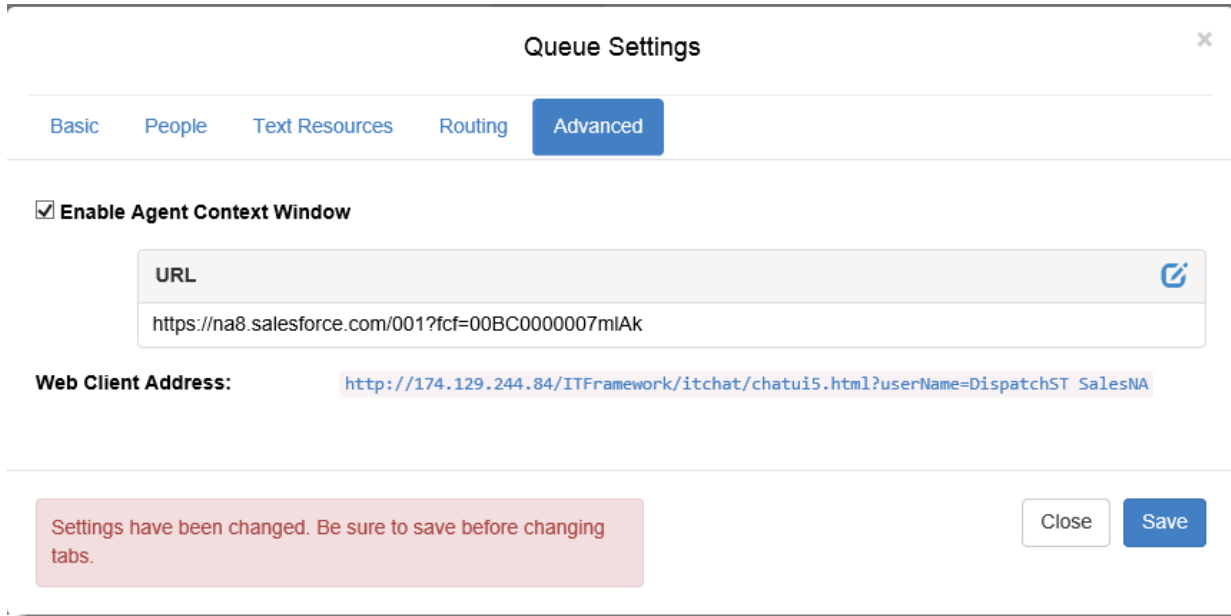
---

## SEEKER TIMEOUT

This value is the amount of time a seeker in the queue will wait before being informed that an agent could not be located.

## ENABLE AGENT CONTEXT WINDOW

Each queue may be optionally configured to render a URL to the agent when the agent accepts a conversation from the queue. This URL may be the location of an enterprise ticketing service, an external CRM system, or the standard URL provided as part of Chime.




The screenshot 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 'Advanced'. The 'Advanced' tab is selected and highlighted in blue. Under the 'Advanced' tab, there is a checkbox labeled 'Enable Agent Context Window' which is checked. Below this checkbox is a text input field labeled 'URL' containing the text 'https://na8.salesforce.com/001?fcf=00BC0000007mlAk'. To the right of the URL field is a small blue icon of a document with a pencil. Below the URL field is a label 'Web Client Address:' followed by a text input field containing the URL 'http://174.129.244.84/ITFramework/itchat/chatui5.html?userName=DispatchST SalesNA'. At the bottom of the dialog, there is a red notification box on the left that says 'Settings have been changed. Be sure to save before changing tabs.' and two buttons on the right: 'Close' and 'Save'.

Figure 21: Enable Context Window


This context window URL will be transmitted to the agent's Chime plugin when the agent accepts a conversation from the queue. The context window will be displayed at the bottom of the XMPP chat window and will be associated with the Chime session.



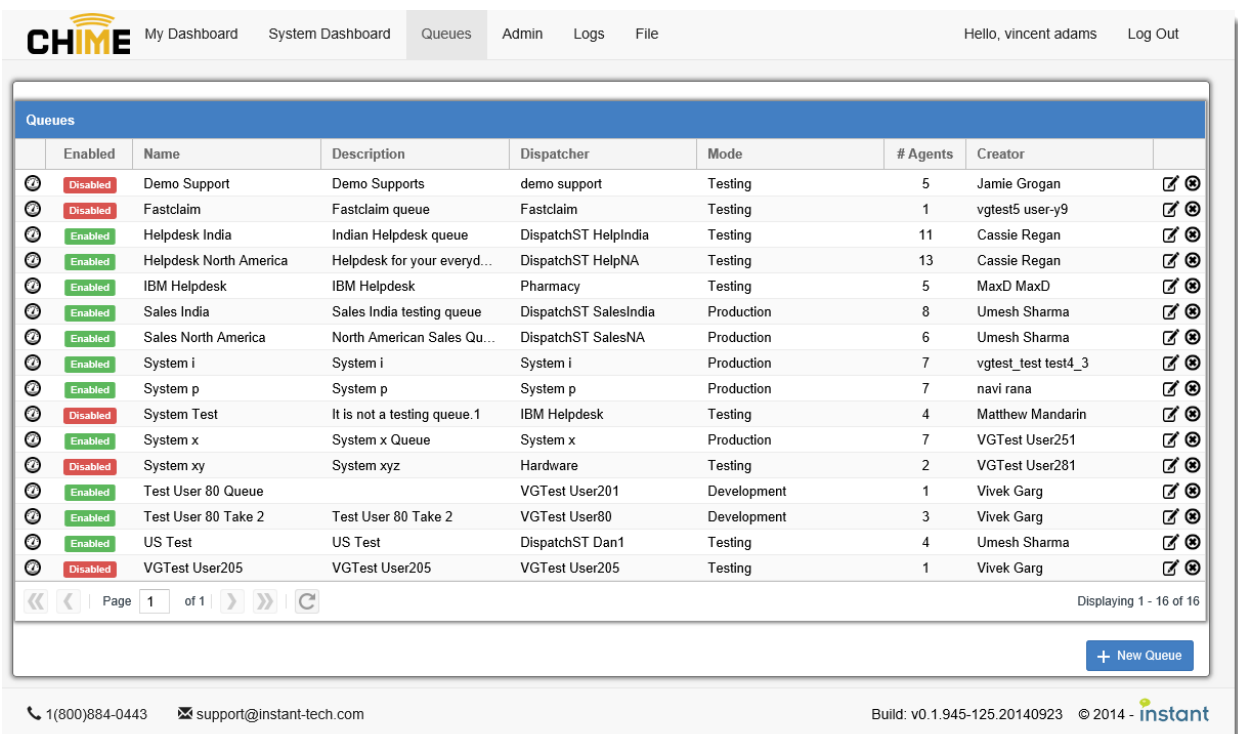
## DELETING A QUEUE

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.



The screenshot shows the CHIME application interface. At the top, there's a navigation bar with 'My Dashboard', 'System Dashboard', 'Queues' (selected), 'Admin', 'Logs', and 'File'. The user is logged in as 'Hello, vincent adams'. Below the navigation bar is a table titled 'Queues'. The table has columns: 'Enabled', 'Name', 'Description', 'Dispatcher', 'Mode', '# Agents', 'Creator', and action icons. The table lists 16 queues. At the bottom of the table, there's a pagination control showing 'Page 1 of 1' and a 'New Queue' button. The footer of the application shows contact information, build version, and copyright.

















































Enabled	Name	Description	Dispatcher	Mode	# Agents	Creator	
	Demo Support	Demo Supports	demo support	Testing	5	Jamie Grogan	 
	Fastclaim	Fastclaim queue	Fastclaim	Testing	1	vgtest5 user-y9	 
	Helpdesk India	Indian Helpdesk queue	DispatchST HelpIndia	Testing	11	Cassie Regan	 
	Helpdesk North America	Helpdesk for your everyd...	DispatchST HelpNA	Testing	13	Cassie Regan	 
	IBM Helpdesk	IBM Helpdesk	Pharmacy	Testing	5	MaxD MaxD	 
	Sales India	Sales India testing queue	DispatchST SalesIndia	Production	8	Umesh Sharma	 
	Sales North America	North American Sales Qu...	DispatchST SalesNA	Production	6	Umesh Sharma	 
	System i	System i	System i	Production	7	vgtest_test test4_3	 
	System p	System p	System p	Production	7	navi rana	 
	System Test	It is not a testing queue.1	IBM Helpdesk	Testing	4	Matthew Mandarin	 
	System x	System x Queue	System x	Production	7	VGTest User251	 
	System xy	System xyz	Hardware	Testing	2	VGTest User281	 
	Test User 80 Queue		VGTest User201	Development	1	Vivek Garg	 
	Test User 80 Take 2	Test User 80 Take 2	VGTest User80	Development	3	Vivek Garg	 
	US Test	US Test	DispatchST Dan1	Testing	4	Umesh Sharma	 
	VGTest User205	VGTest User205	VGTest User205	Testing	1	Vivek Garg	 

Figure 22: Queues Table

Each queue maintains a dashboard to display a summary of activity for the current day.

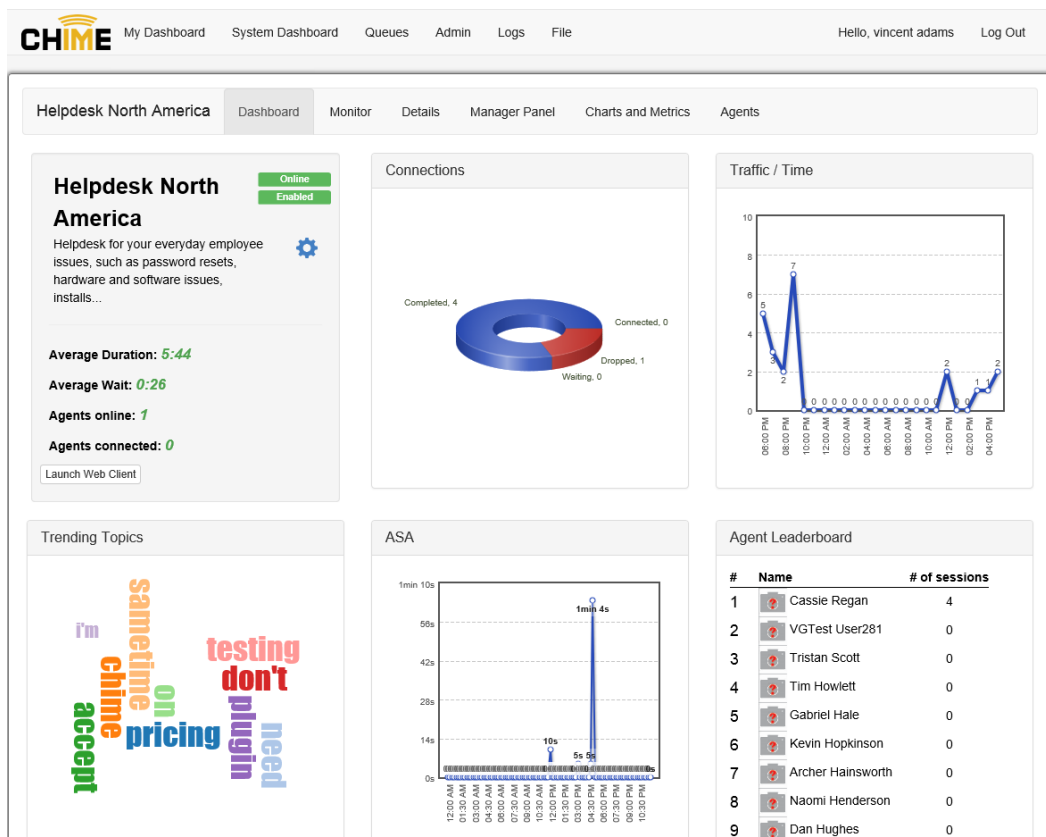


Figure 23: Queue Dashboard

## CONNECTING SEEKERS WITH EXPERTS

Once queues are configured, they are ready to connect people.

### STARTING A CHAT WITH A QUEUE

To start a chat with a queue, a user simply needs to send a message to the dispatcher associated with that queue.

---

#### XMPP

To start a message with a XMPP client, a user must simply open a message with the dispatcher. Opening the IM window should open a connection, and Chime will begin searching for a person to connect to.

---

#### WEB CLIENT

To start a message using the Chime web client, a user simply needs to click a hyperlink that can be staged in any number of locations. When the chat client starts, it will attempt to connect with its associated queue, and allow users to chat with XMPP users on the other end.

### 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 seekers. When a seeker sends out a chat request and an expert is available to accept it, that expert will receive a prompt with a text resource informing them that a request has come in, and asks if they want to handle that chat.

---

#### ACCEPTING A CHAT IN LYNC

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 person will chat directly. Users will also have all the capabilities of the Lync client available to them during the conversation.

---

## ACCEPTING A CHAT IN XMPP

For an incoming request in XMPP, 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 dispatch, Chime will connect the person directly with the seeker, and will relay the messages back and forth.

Agents using the XMPP client should install the Chime for XMPP plugin – which provides for extended function with the Chime server.

The Chime for XMPP plugin allows an agent to:

- Display the Chime context window
- Transfer a Chime session to another queue
- Transfer a Chime session to another expert
- Invite any other person using XMPP into the Chime session (for instance, include another person from the organization even if the person is not registered as a Chime agent)
- Easily include standard replies
- Manage after call work (ACW) mode
- Receive multiple concurrent chats from a Chime queue

## CONCURRENT CHATS

Experts can receive multiple chat conversations at once. The number of concurrent chats that an expert can handle is set at an Admin level.