



Alert Notification User Guide

Fall 2016

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CHIME ALERT NOTIFICATION USER GUIDE

INTRODUCTION

Chime is intended to offer a platform that provides additional channels to a new, or existing, service desk. Typically, this involves providing the ability to run an IM based access point to a collection of agents representing a service desk. Additionally, Chime provides a state of the art alert system to notify employees on your network about new developments throughout the day. Chime has the capability to run the inbound (click-to-chat) and the outbound (alert notifications) features in tandem, as well as on their own.

Alerts for Chime allow you to easily create and send out alerts to employees in your company's Active Directory, as well as Skype for Business users outside of the company. Alerts can be fully customized: you can choose when they are sent, whether they are sent out on a schedule, when they expire, and what priority they are. Templates can be created for the alerts so that you can send out similar alerts for ease of use. Additionally, there is support for alert history, allowing managers to view sent alerts, view who has received the alerts and who has yet to receive them.

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, and other common platforms.

This document will provide an overview of the alert module within the Chime platform and describe how to initialize and configure the Chime environment. This guide will provide ways to avoid conflicts that might occur with the inbound (click-to-chat) features of Chime.

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

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 your 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:

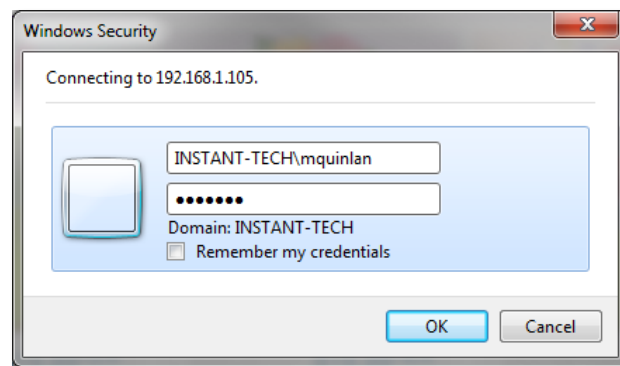


Figure 1: Windows Authenticated Login

GETTING STARTED

Chime, along with providing service desk functionality, has the ability to send out alerts. To use the alerting functionality, we will need to create and populate a queue that will be used to distribute the alerts. Creating a queue and adding agents just requires a few easy steps:

1. [Add People to Chime](#): Adding a Person to Chime is done in the Admin section. Once a Person is provisioned in Chime, they can be added to a queue.
2. [Add a Dispatcher account](#): Adding a Dispatcher to Chime is done in the Admin section. This needs to be a Lync enabled account and the alert messages will be sent using this account. We recommend naming this account something that will be easily recognizable.
3. [Add a license](#): The license is provided to you from Instant Technologies and allows you to send out alerts.
4. [Create a Queue](#): When we create the queue, we will be assigning a license to the queue and a dispatcher.
5. [Add People to a Queue](#): Here we will add people to the queue. After the People are added to the queue, they can then create alerts and manage the alert history.

To start, go to the Admin section at the top of the page.

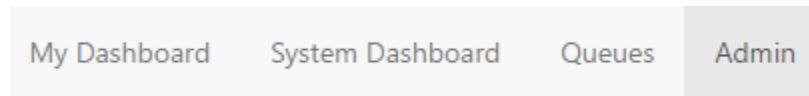


Figure 2: Admin section

ADD PEOPLE TO CHIME

The Admin area has six main categories: *People*, *Dispatchers*, *Settings*, *View Archived*, *Control Panel* and *Virtual Agents*. 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 and admins), are provisioned. Adding a person here imports them to the Chime directory so they can then be added into a queue. Once an agent with manager privileges or an admin is added to a queue, they will be able to create alerts, view history and use the manager's chat room. This is also where you'll set global properties associated with each user.

ADDING A PERSON

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

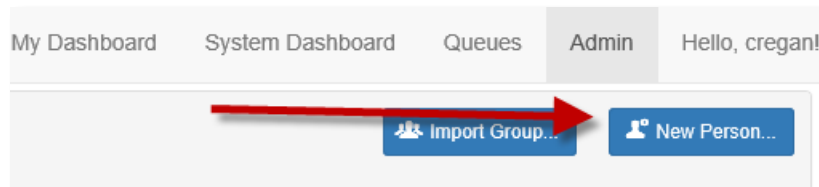


Figure 3: Adding a new person

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

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.

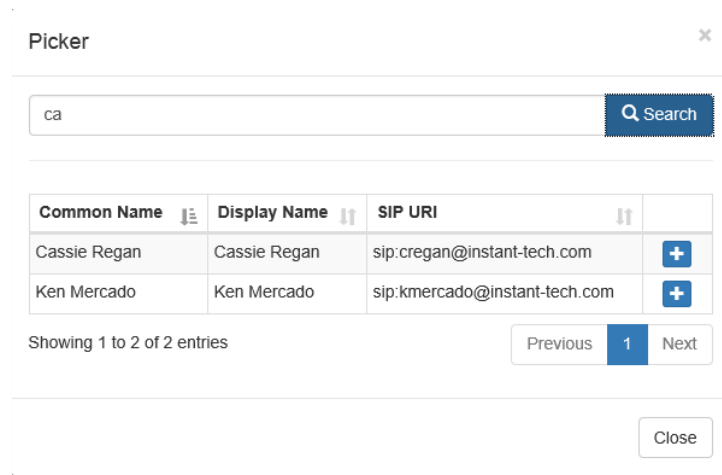


Figure 4: Selecting a user from the directory picker

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

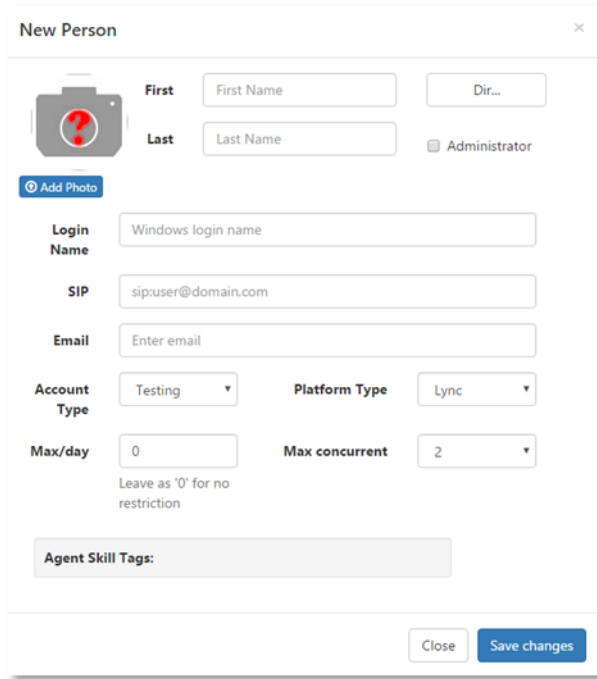


Figure 5: Chime person settings

First: The person's first name

Last: The person's last name

Administrator: Provides user Administration rights to Chime. This is a global setting

Login Name: The agent's Windows login name

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)*

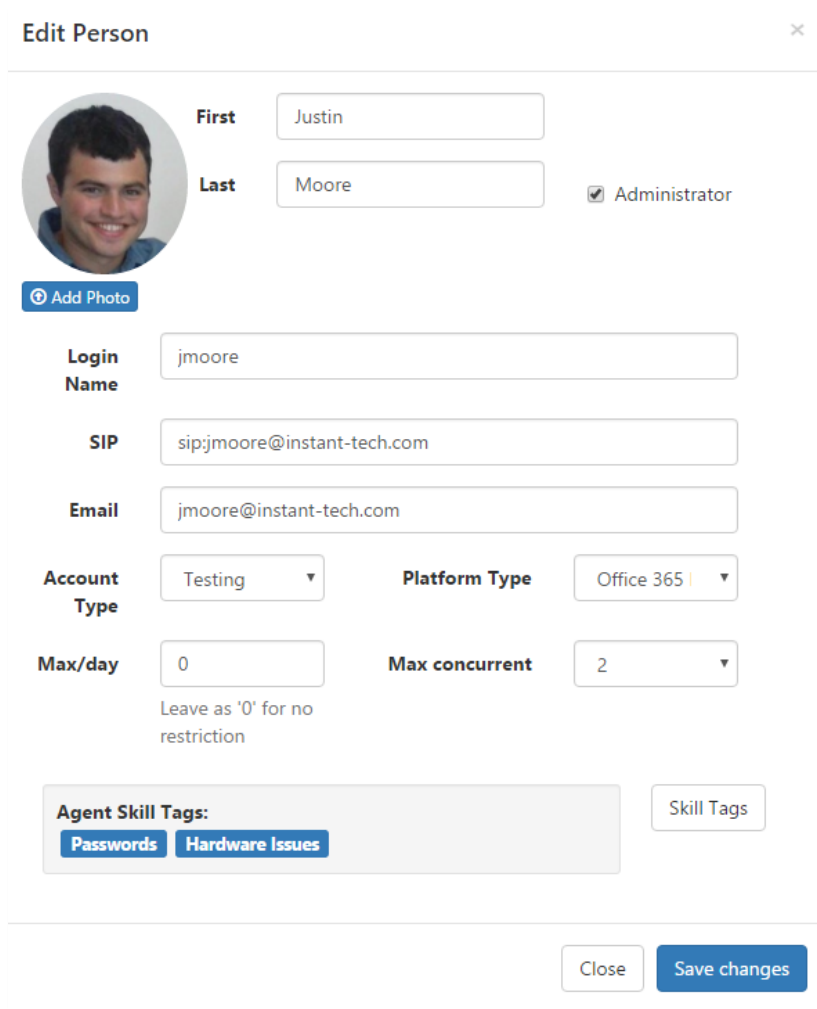
Agent Skill Tags: Specific skill tags can be attached to each agent. An agent must first be added to the People section before acquiring any skill tags*

**These settings are not necessary when only using the Alerting functionality*

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.




The screenshot shows the 'Edit Person' window with the following fields and values:

- First:** Justin
- Last:** Moore
- Administrator:**
- Login Name:** jmoore
- SIP:** sip:jmoore@instant-tech.com
- Email:** jmoore@instant-tech.com
- Account Type:** Testing
- Platform Type:** Office 365
- Max/day:** 0 (Note: Leave as '0' for no restriction)
- Max concurrent:** 2
- Agent Skill Tags:** Passwords, Hardware Issues

Buttons at the bottom: Close, Save changes

Figure 6: 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.

ADD A DISPATCHER ACCOUNT

A dispatcher is a Lync-enabled account that is used to broker chats as well as distribute alerts within Chime. The dispatcher needs to be 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. Using this form, you can enter in all the fields manually or you can click the **Directory** button to search your directory service for a specific dispatcher you want to use.

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

- SIP:** A text input field containing 'Dispatcher ID' and a 'Dir...' button.
- Description:** A large text area.
- 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 blue message box: 'Please verify the connection or press "Close" to exit'.
- Buttons at the bottom: 'Test Connection', 'Close', and 'Save changes'.

Figure 7: Chime dispatcher settings

SIP: 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 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.

ADD A LICENSE

SETTINGS

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

SERVER SETTINGS

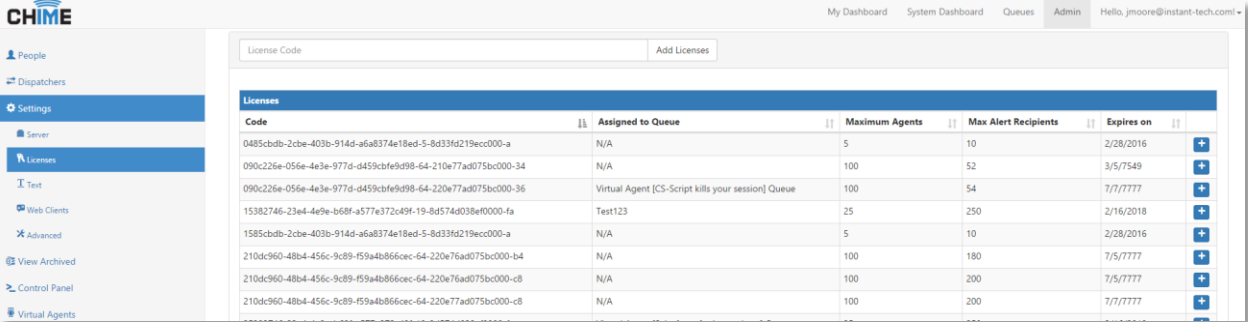
Directory Service – This section includes the Server Name and Directory Service user. These fields should be pre-filled and they should not be configurable by any user.

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

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	Max Alert Recipients	Expires on
0485c9db-2cbe-403b-914d-a6a8374e18ed-5-8d33fd219ecc000-a	N/A	5	10	2/28/2016
090c226e-056e-4e3e-977d-d459cbfe9d98-64-210e77ad075bc000-34	N/A	100	52	3/5/7549
090c226e-056e-4e3e-977d-d459cbfe9d98-64-220e77ad075bc000-36	Virtual Agent [CS-Script kills your session] Queue	100	54	7/7/7777
15382746-23e4-4e9e-b68f-a577e372c49f-19-8d574d038ef0000-fa	Test123	25	250	2/16/2018
1585c9db-2cbe-403b-914d-a6a8374e18ed-5-8d33fd219ecc000-a	N/A	5	10	2/28/2016
210dc960-48b4-456c-9c89-f59a4b866cec-64-220e77ad075bc000-b4	N/A	100	180	7/5/7777
210dc960-48b4-456c-9c89-f59a4b866cec-64-220e77ad075bc000-c8	N/A	100	200	7/5/7777
210dc960-48b4-456c-9c89-f59a4b866cec-64-220e77ad075bc000-c8	N/A	100	200	7/7/7777

Figure 8: License Settings

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.*

VIEW ARCHIVED

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

CREATE A QUEUE

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

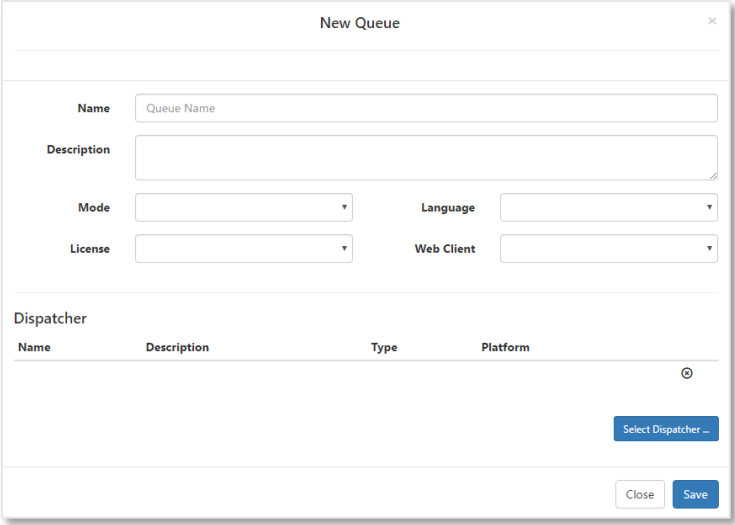
Mode: Identifies the queue as being used for Testing, Development, or Production

Language: Marks the queue as being associated with a specific language

License: Select a license key that the queue will use

Web Client: A web client for to host the queue. *For an Alerts only queue you can select Default Web Client*

You must also select a dispatcher that this queue will use to distribute out the alerts that are created. Click on **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 screenshot shows a 'New Queue' dialog box with the following fields and controls:

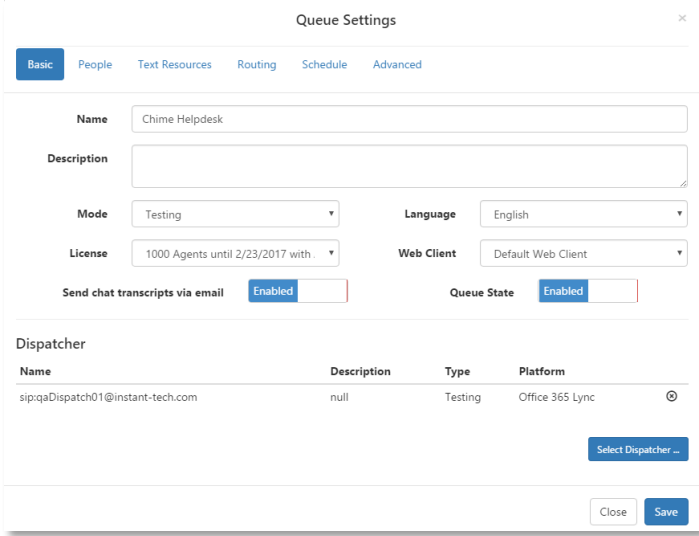
- Name:** Text input field with placeholder 'Queue Name'.
- Description:** Text area.
- Mode:** Dropdown menu.
- Language:** Dropdown menu.
- License:** Dropdown menu.
- Web Client:** Dropdown menu.
- Dispatcher:** A table with columns: Name, Description, Type, Platform. Below the table is a 'Select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

Figure 9: 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, click the  icon for the queue in the queue grid. This will open queue settings window.



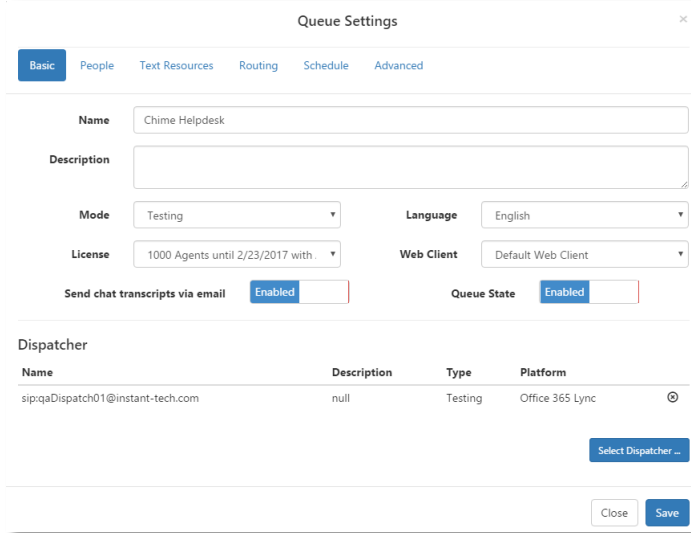
The screenshot shows the 'Queue Settings' window with the 'Basic' tab selected. The queue name is 'Chime Helpdesk'. The 'Queue State' is set to 'Enabled'. The 'Dispatcher' table lists one dispatcher: sip:qaDispatch01@instant-tech.com.

Name	Description	Type	Platform
sip:qaDispatch01@instant-tech.com	null	Testing	Office 365 Lync

Figure 10: 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 the 'Queue Settings' window with the 'Basic' tab selected. The queue name is 'Chime Helpdesk'. The 'Queue State' is set to 'Enabled'. The 'Dispatcher' table lists one dispatcher: sip:qaDispatch01@instant-tech.com.

Name	Description	Type	Platform
sip:qaDispatch01@instant-tech.com	null	Testing	Office 365 Lync

Figure 11: Basic Queue Settings

ADD PEOPLE TO A QUEUE

PEOPLE SETTINGS

The People settings page allows you to add people that can be given different permissions.

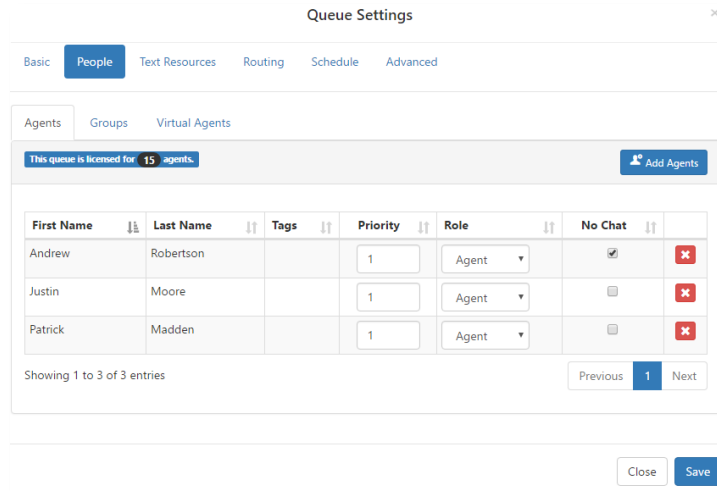



Figure 12: Queue People

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 name below the grid. You can select multiple users to add, and clicking the **X** next to a user's name in their badge will remove them from the list of users to add. Once you are done selecting users, click **Save**, and they will instantly be added to the queue.

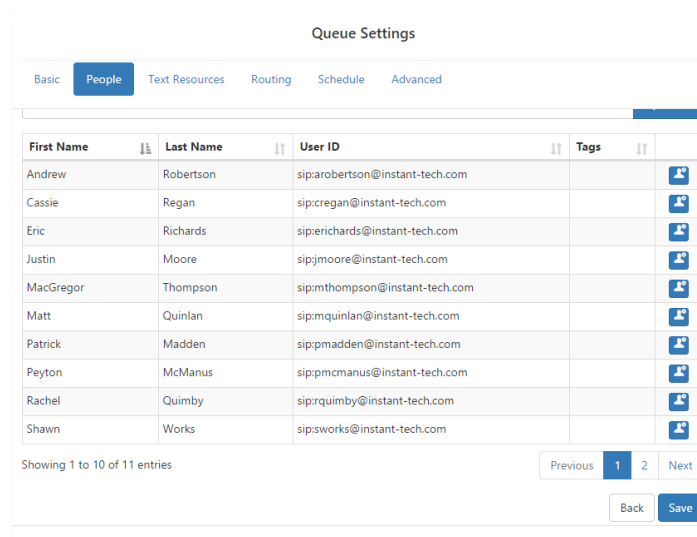


Figure 13: Selecting users from the picker

When you add a user to the queue they will initially be assigned a role. These roles are the queue specific permissions that each person in the queue has. To change them you must be in the queue settings and navigate to the People settings page.

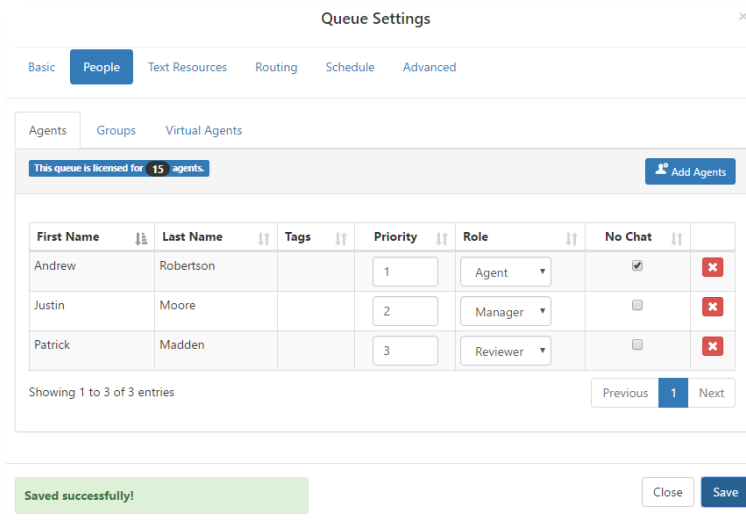



Figure 14: Queue People

Each person in the queue has their own specific role setting that can be found in the Role column. There you will find a dropdown menu that presents the 3 roles that a person can have in a queue. Clicking the role you want to set for the person will change the role associated with them, but for the settings to take effect, you must click Save at the bottom right of the Queue Settings modal. *Note: If a person is an admin, their permissions will not be affected by changing their role.*


The three roles that can be assigned to a person are: Agent, Reviewer, or Manager. To allow people assigned to the queue to send alerts, they must be given the Manager role in the queue. This allows that person to edit queue settings and view queue dashboards and create, send and review alerts. If someone is an admin, they will also be able to access these same settings and the queue dashboard.

As an alternative to setting someone as a Manager, there is another role that works similarly; Reviewer. Setting someone as a Reviewer allows that person to access the queue dashboard and all of the associated menus in the queue. However, they will not be able to edit queue settings. This essentially allows them to be able to create alerts, but not modify the queue.

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

ALERTS

QUEUE DASHBOARD

Click the  icon in the queue grid to navigate to a Queue Dashboard page. The Queue Dashboard is where you will go to create, manage and monitor alerts.

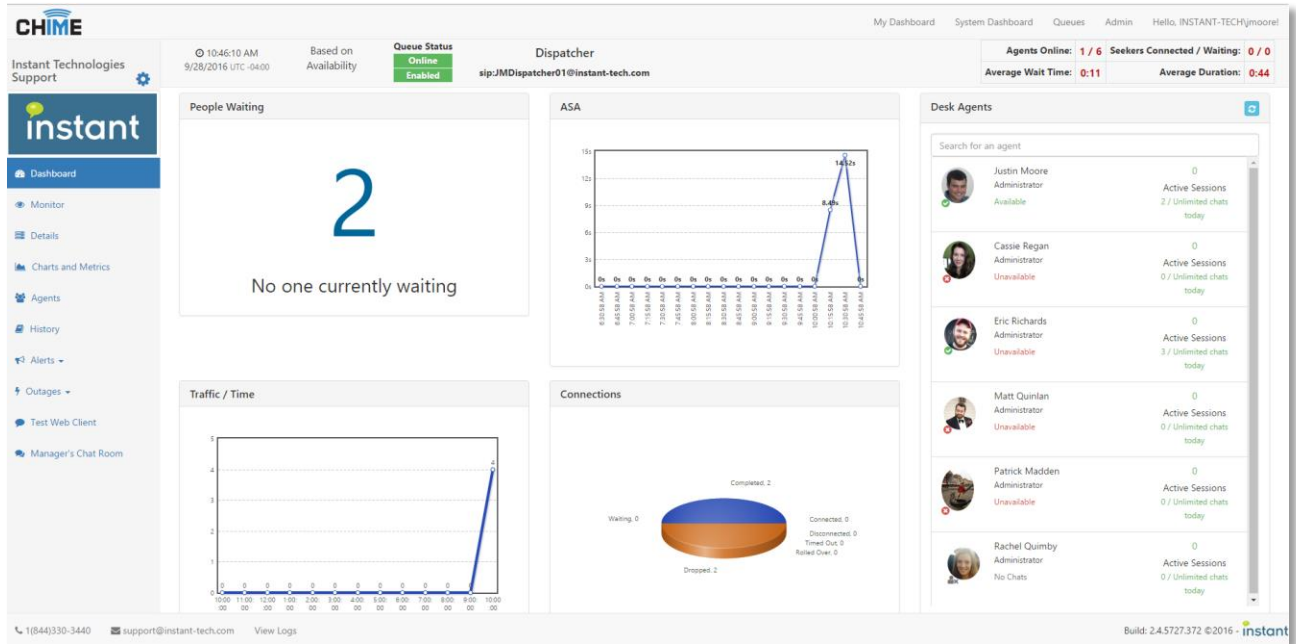


Figure 15: Queue Schedule – Choose time

ALERT TYPES

In Chime there are two options for the types of alerts you can create, Default and Enhanced.

A default alert will be sent to the recipients as a Lync®/Skype for Business® message from the dispatcher. The message will open up as a toast notification and open up as a message from the dispatcher. This is the most standard type of alert and will work as intended if the recipient does not have the Chime Alert Assistant.

An Enhanced alert however, will open up using the Chime Alert Assistant. With the Enhanced Alerts you can send the alert using Rich Text, alter the colors of the text or alert background, display who sent the alert, as well as the size and position of the alert when it pops up on the recipients screen. If the Chime Alert Assistant is not installed, the alert will open as a toast, and provide a link to view the Enhanced alert in your browser.

Enhanced Alerts require the Chime Alert Assistant to be installed and running on the client system. The Chime server must be set up to support SSL and HTTPS connectivity. To enable SSL and HTTPS support please refer to [Appendix A: Setup SSL:](#)



Figure 16: Chime Alert Assistant – System Tray

When you install the Chime Alert Assistant, you will have a new icon in your system tray. This is where you will access all of the settings for the Chime Alerts Assistant. Right click on the app and click on Settings. This will allow you to configure the settings for the Chime Alert Assistant.

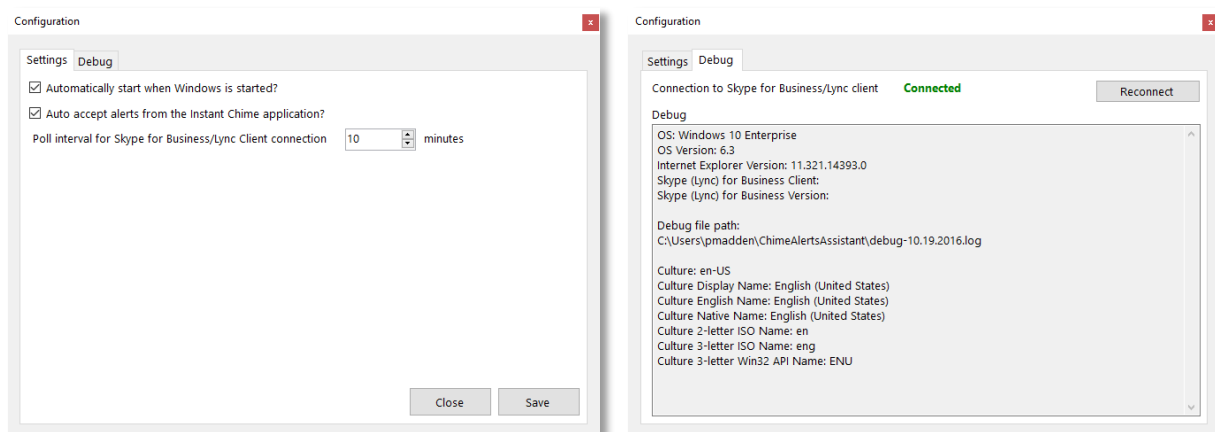


Figure 17: Chime Alert Assistant

CREATE ALERT

To create an alert, click the 'Alerts' drop down menu, and then **Create Alert**.

1. The first section, 'Message', is where you fill in the alert's title and the message you want to send to the recipients.

Figure 18: Alert Message

2. Additionally you can select between multiple languages to set for the alert. In the top right of the Create an Alert box, there is a dropdown that you can choose a language from. Once you select a language you want to add, click the Add Language button.

Figure 19: Adding Additional Languages

3. This will create a new tab where you can type in the title and body of the message. Having multiple language tabs will create additional messages in your alert. To delete a language from the alert, simply click the red x at the top of the language tab you want to delete. When finished, click the next button.

- The second section, 'Recipients', is where you assign who will receive the alert. You can choose specific users, groups, and queues to receive the alert. There are three ways you can select recipients.
 - From Active Directory: If the recipient is in Active Directory, they be added by searching for them in the Search > Active Directory section. In this section you can search by users or by AD groups by clicking the drop-down arrow and selecting between groups and users.
 - From the Queue: A recipient that is in the queue can be added by on either the "Add Queue Agents" or "Add Queue Managers" button.
 - Federated User: The third way to add a recipient is by using the Add Federated User section. In here, you type in "sip:" and then the email address of whomever you want to send the alert to. This allows the option of sending the alerts to users outside of the active directory.

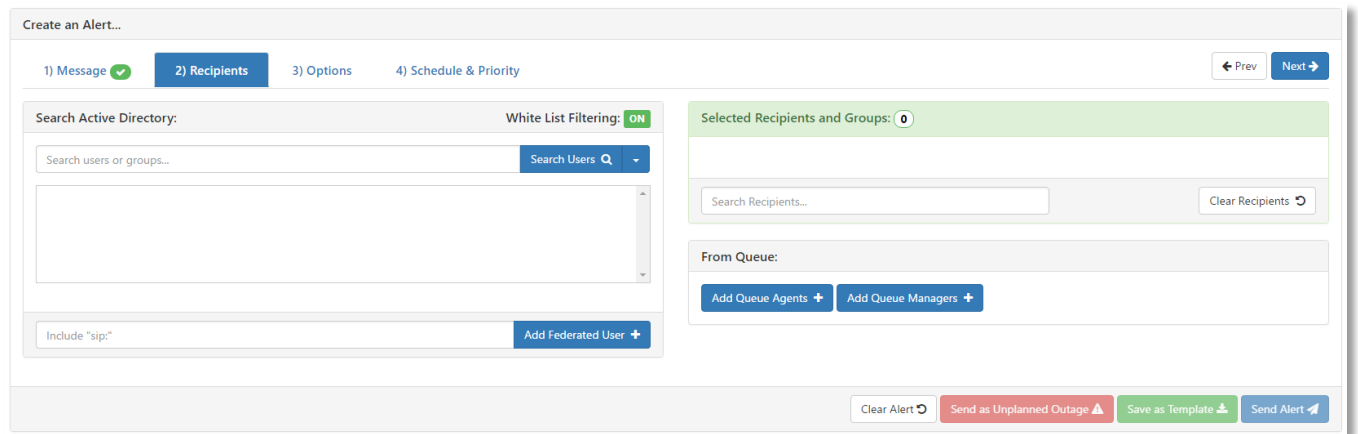


Figure 20: Alert Recipients

- After adding the recipients, they will show up in the Selected Recipients and Groups box. To remove any of them from the recipient list, simply click the Remove button to the right of the recipient's name. When finished adding all necessary recipients to the list, click the next button to proceed to the next step.

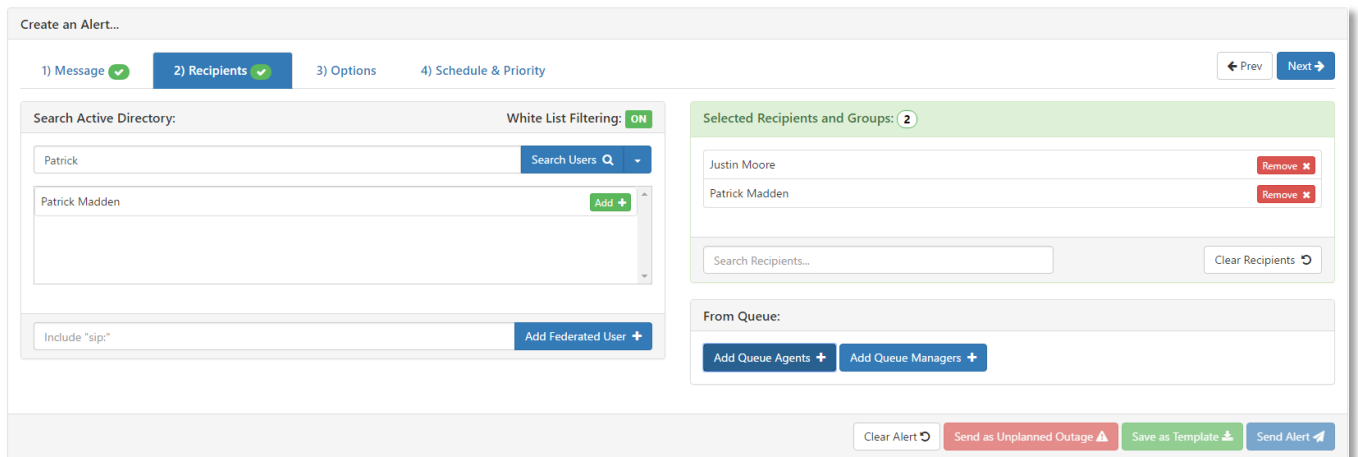


Figure 21: Added Recipients

6. The third section, 'Options', is where you can enhance the alert. When you first open up the Options tab, you will see a selection toggle that allows you to select between default alerts and enhanced alerts.
 - The default alert sends out an alert to users simply using the Lync/Skype for Business client and does not allow you to change the look and feel of the alert.
 - The enhanced alert, however, allows you to change the look of the alert, and add in extra features. To use the enhanced alerts, it is highly recommended that the users receiving the alerts have the Chime Alert Assistant installed and running.
7. If you want to use the default alert option, all you need to do is leave the Alert Type toggle set to 'Default'. You can then press the Next button and proceed to the final step.

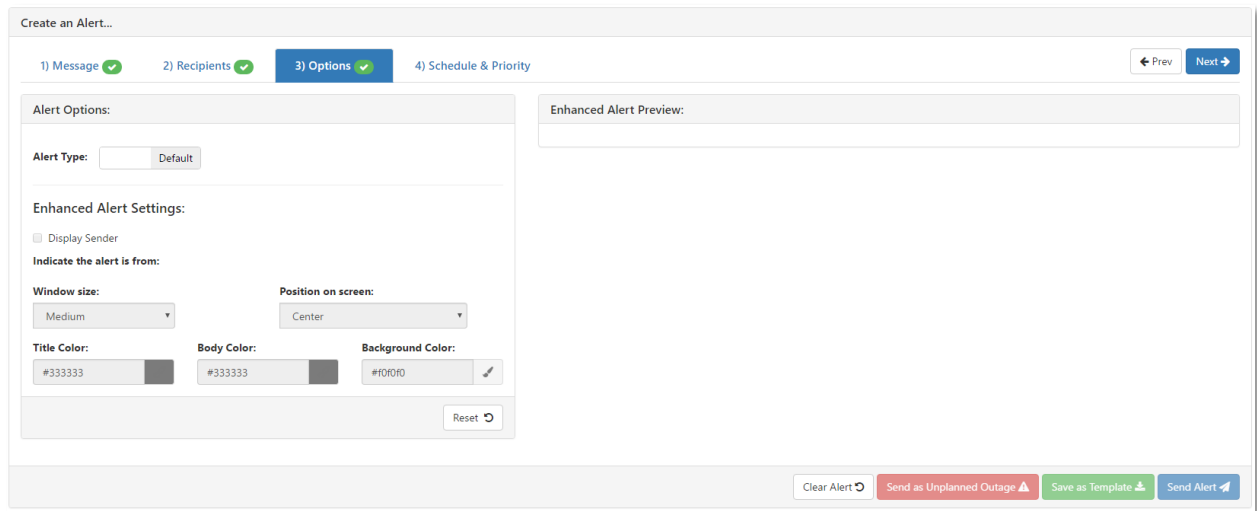


Figure 22: Alert Options

8. If you want to create an enhanced alert, there are a few extras steps you have to complete before moving on to the final step.
 - First, you must change the Alert Type toggle to 'Enhanced'. This will allow you to access the rest of the enhanced alert settings as well as display a preview of the alert.
 - Second, you must decide if you want to display the sender information. By clicking the check box for 'Display Sender', the Preview will update and show your Chime user image along with a "message on behalf of:" label. If you need to send the alert on behalf of someone else, you would click the Pick user from directory button and be able to select a different user to show up in the image and in the label.
 - Next, you are able to determine how the alert will look. There are five options that you can select from to alter the various aspects of the alert. You can change size, position it will open on the screen, title color, body color, and the background color. Using these tools, you can thoroughly customize the alert.
 - At any point when customizing the enhanced alert, you are able to click the 'Reset' button and clear all of the settings for the enhanced alert settings.

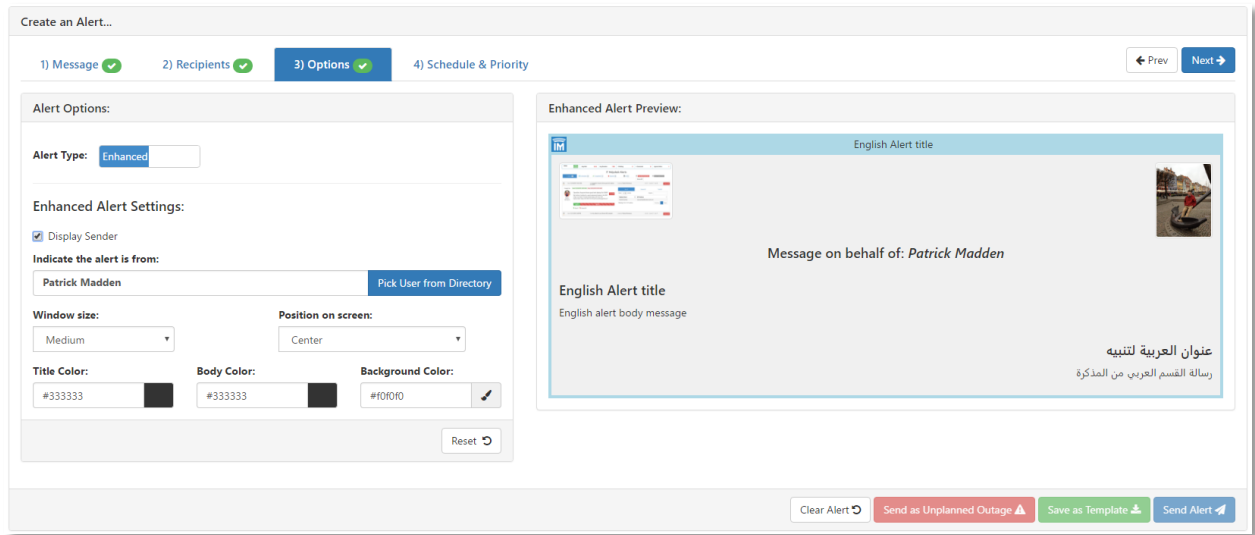


Figure 23: Enhanced Alert Features

- The last section, Schedule & Priority, is where you can schedule the delivery and expiration time, as well as set a priority for the alert.

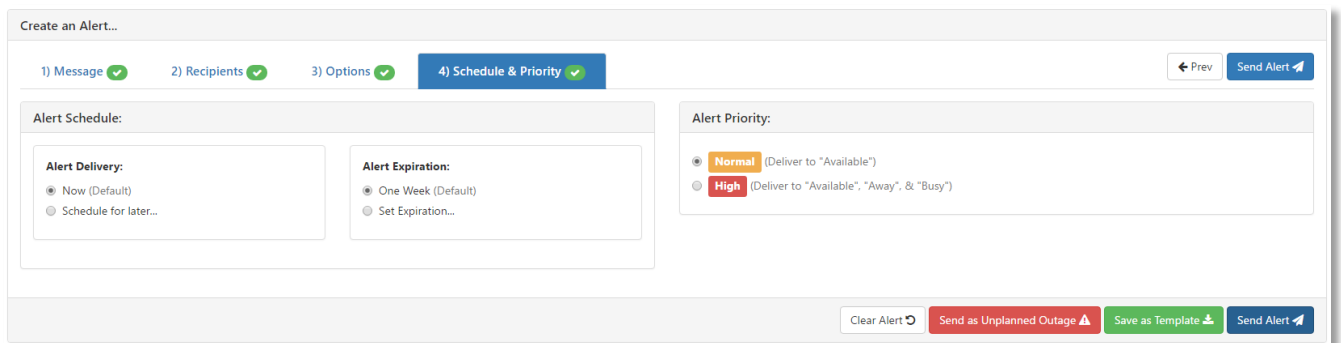


Figure 24: Alerts Schedule & Priority

At any point during the creation of an alert, you are able to clear everything and start over. There is a “Clear Alert” in the bottom left of all of the pages that you are able to click to restart back on the first step of creating the alert with all of the fields cleared.

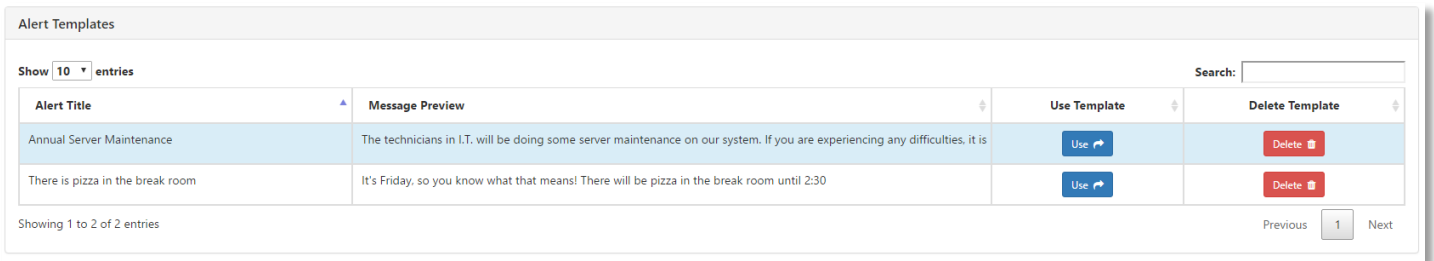
During the creation process of an alert, you can set it as an Unplanned Outage, which will add the alert you made to the Outages tab of the Queue Dashboard. It will send out the message you created as well as add it to the Outage history section of Outages.

Finally, by hitting the Send Alert button, the alert will be sent to the recipients and added into the Alert History section.

ALERT TEMPLATES

When creating an alert you also have the option to save the format of the alert you just created as a template. To do this, you must have finished all four steps of creating an alert. The option to save as a template will then appear at the bottom of the screen. Once you create a template, it will store the outline of the alert you created in the Alert Templates sub-menu.

To view templates of previously created alerts, click **Alert Templates** in the Alert drop-down tab.



Alert Title	Message Preview	Use Template	Delete Template
Annual Server Maintenance	The technicians in I.T. will be doing some server maintenance on our system. If you are experiencing any difficulties, it is	Use	Delete
There is pizza in the break room	It's Friday, so you know what that means! There will be pizza in the break room until 2:30	Use	Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

Figure 25: Alert Templates

In the Alert Templates section you are able to use or delete the templates created on Chime.

- By clicking the 'Use' button, you will be brought into the **Create Alert** section and all of the settings will be identical to when the template was saved. From there you will be able to change the settings, messages, or any other aspects of the alert.
- Selecting the delete button allows you to remove existing templates that are stored in Chime. Note: If you delete a template, there is no way to recover it.

ALERT HISTORY

To see the details of all created alerts, click **Alert History**. This page allows you to filter through different kinds of alerts and see who has received the alerts.

Active: These are all the Alerts that are currently active and are being sent to users as they become available

Scheduled: These are the Alerts that have been scheduled to be sent out, but the scheduled time hasn't been reached yet.

Completed: These are the Alerts that have been sent out to all recipients.

Expired: These are Alerts that the time expired before the alert was sent to all recipients.

Showing All: This allows you to toggle between displaying all Alerts, High Priority Alerts, or Standard Alerts.

Active 1	Scheduled 1	Completed 4	Expired 0	All 6	All	Page 1 of 1	Show 10	Select	
✓ ⚡ ★									
Starts: Sep 28, 2016 11:28 AM									
Title: Meeting today at 2:30									
Created by: Patrick Madden									
IM: 0 Enhanced: 0 Email: 0 Unsent: 2 Total: 2									Delete
✓ ✓ ★									
Starts: Sep 28, 2016 11:26 AM									
Title: Meeting today at 2:30									
Created by: Patrick Madden									
IM: 1 Enhanced: 1 Email: 0 Unsent: 0 Total: 2									Delete
✓ ✓ ★									
Starts: Sep 28, 2016 11:14 AM									
Title: English Alert title									
Created by: Patrick Madden									
IM: 0 Enhanced: 2 Email: 0 Unsent: 0 Total: 2									Delete
✓ ✓ ★									
Starts: Sep 28, 2016 10:51 AM									
Title: अग्निरामन अभ्यास									
Created by: Vivek Garg									
IM: 0 Enhanced: 1 Email: 0 Unsent: 0 Total: 1									Delete
✓ 📅									
Starts: Sep 27, 2016 1:19 PM									
Title: Test to just a whitelist									
Created by: Peyton McManus									
IM: 7 Enhanced: 0 Email: 0 Unsent: 1 Total: 8									Delete
✓ ✓ ★									
Starts: Sep 27, 2016 1:13 PM									
Title: استعداد									
Created by: Vivek Garg									
IM: 0 Enhanced: 1 Email: 0 Unsent: 0 Total: 1									Delete

Figure 26: Alert History

ALERT DETAILS

By clicking on one of the alerts in any of the different tabs, you are able to open up the details of the specific alert. The details of the alert show who the alert was created by, when it was sent, who it was sent on behalf of, how many people have received it, or not received it, as well as the messages that were in all of the languages it was sent in.

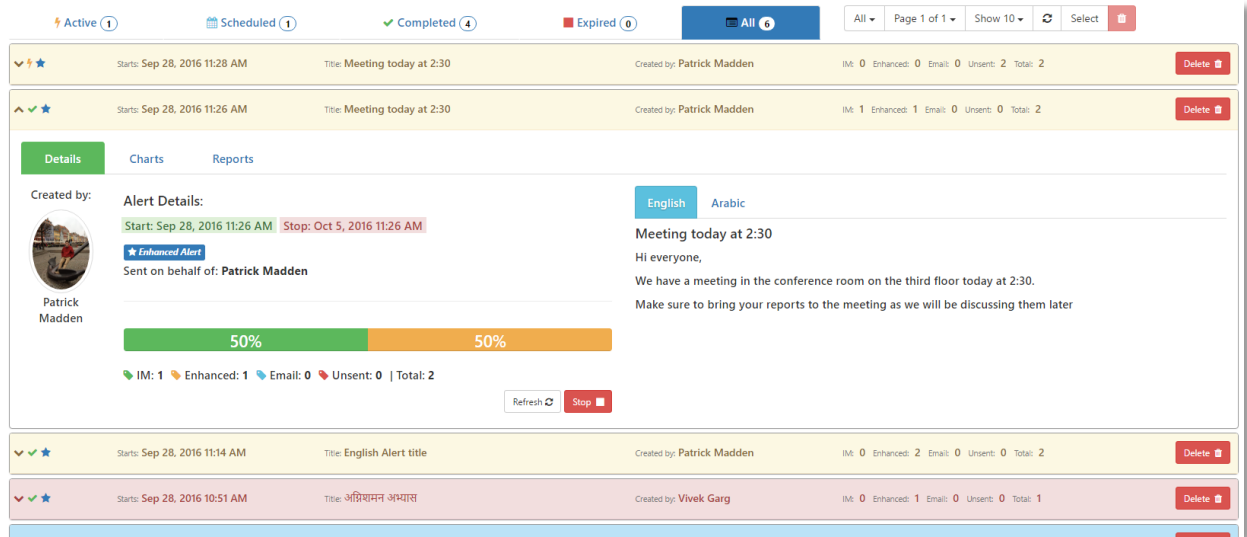


Figure 27: Alert Details

The charts tab shows various different sets of information that allow you to have a deeper understanding of how the alert was sent out and how many people have received the alert. To display the different charts, simply select the chart you want to display from the drop-down and then click the render chart button. Once the chart is displayed, you can use the Export CSV or Export chart buttons to save the information displayed in the chart.

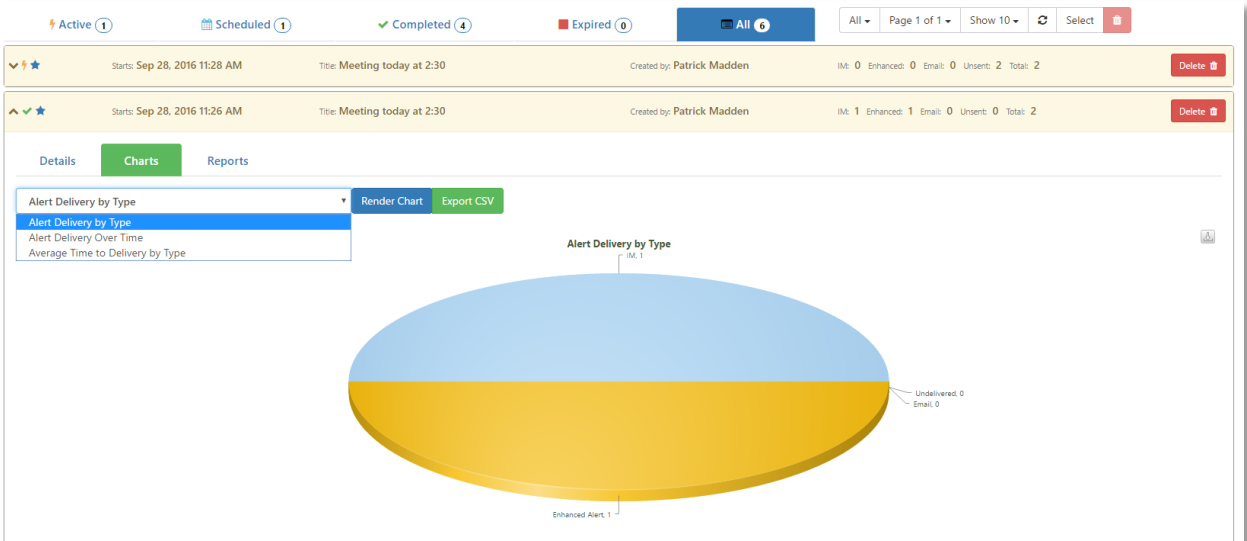


Figure 28: Alert Charts

The Reports tab shows the recipients of the alert and how they have received the alert. The five sections in reports are IM, Enhanced, Email, Unsent and Total. Going through the tabs can give you a better understanding of who has received the alert, what method they received it by, and how long it took them to receive the alert. Similarly to the Charts section, you are able to export the information to a csv file for further use.

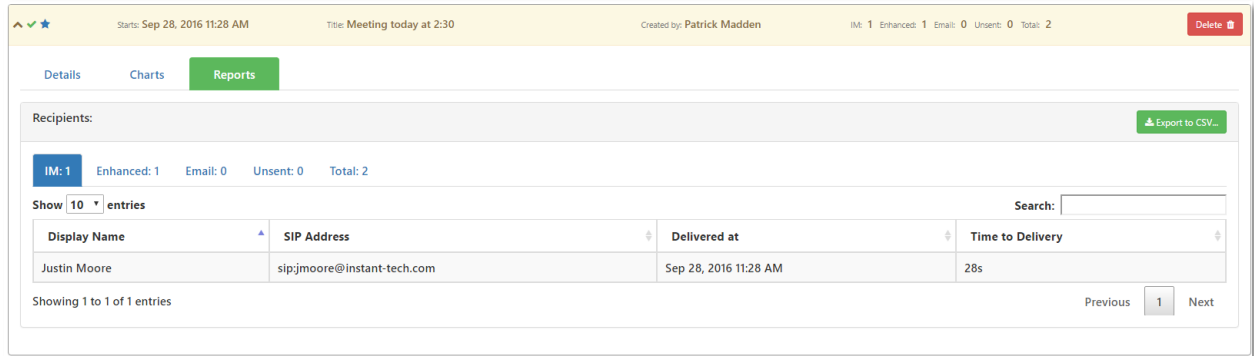



Figure 29: Alert Reports

DELETE AN ALERT

Alerts can be deleted two different ways. You can delete a single alert by pressing the “Delete” button for the Alert you wish to remove. To delete multiple Alerts, press the “Select” button, select the alerts you wish to remove, then press the  button.

ALERT SETTINGS

The **Alert Settings** section is primarily for White List Filtering configuration. White List Filtering can limit the Active Directory groups to which alerts can be sent. This is ideal for organizations with large amounts of groups, or those who wish to prevent certain groups from receiving alerts. If enabled, only the groups listed in the White List Groups table on this page can receive alerts. These settings can only be configured by a Chime admin.

To enable and use White List Filtering you must go through a few steps:

1. First, Toggle the White List Filtering setting to the on position.
2. Second, use the Search Active Directory section to search for the group that you want to add to the White List.
3. Click the add button to add it into the group.
4. Alternatively, you can use the Add Known Group Search box to add the group if you know the full name of the group.
5. If you add a group you do not on the White List or want to remove one of the ones on the list, simply click the red x in the remove column for the group name you want to delete. You will be asked to confirm that you want to delete the group from the list.
6. Once you have added groups to the White List, those will be the only groups you can search from in the Recipients section.

AVOIDING CONFLICTIONS WITH CLICK-TO-CHAT FEATURES

Chime is a multi-purpose service and because of that, you may encounter overlapping parts of the inbound and outbound branch. To mitigate the ways this can happen, this section of the user guide will be devoted to covering the settings you can configure to minimize the unwanted interactions with the click-to-chat section of Chime.

AGENT STATE

The Chime click-to-chat service deals more with the queues than the Alert messaging side of Chime and as a result, the roles of a person in a queue will have to be slightly different.



The click-to-chat side of the app uses agents to accept chat requests from users that have questions needing to be resolved. As a result, the agent role does not have access to any of the alert functionality (or access to the queue dashboard at all) and when setting up a queue for alerts only functionality, it is recommended that none of the people assigned to the queue should be assigned the agent role.

The reviewer or manager role are more suitable for someone who will be in an alert-based queue. The main differences between these roles are levels of access. The manager is able to access the queue dashboard and all of the settings that go along with the queue, while the reviewer role only has access to the queue dashboard. Both the reviewer and manager have access to the alerts for that queue. Managers are essentially the admin of the queue, while the Reviewers have enough access to the queue to send and review alerts.

To avoid any scenarios where one of the managers or reviewers are sent requests for click-to-chat it is recommended that Set all people to "No Chat" mode. The option for "No Chat" is located directly to the right of the Role column in the Queue Settings modal.

TEXT RESOURCES

The click-to-chat section of chime utilizes Lync to connect Agents to Seekers who have questions/issues that need to be resolved. Because of this, Chime has a system in place that sends out automated messages to users. To make these messages less confusing they are customizable. To customize these messages you will need to modify the fields of your text resource. To do this, you will need to navigate to the Admin page, then to "Settings" and finally "Text".

Click on the  button for the DefResource. This will open up a modal that will allow you to edit the specific text resource messages. Pressing the  button allows you to change the text associated with the message. These are the specific text resources that should be changed to avoid confusion:

Seeker Text:

- Welcome Message
- Searching for Person

Agent Text:

- Queue Message

System Text:

- Queue Offline
- Prompt for additional text entry

It is recommended that you set the text resources to read "This is an alert only Queue. Chat functionality will not work with this dispatcher". When finished click "Save" and the changes will be implemented.

APPENDIX A:

SETUP SSL

The configuration wizard provides a tool to register an SSL certificate with the Chime application. As a prerequisite, you will need to have a valid SSL certificate installed on the server. Once the certificate has been installed on the server, you can follow these steps.

If using Enhanced Alerts, SSL is required.

1. Click **Setup SSL**.

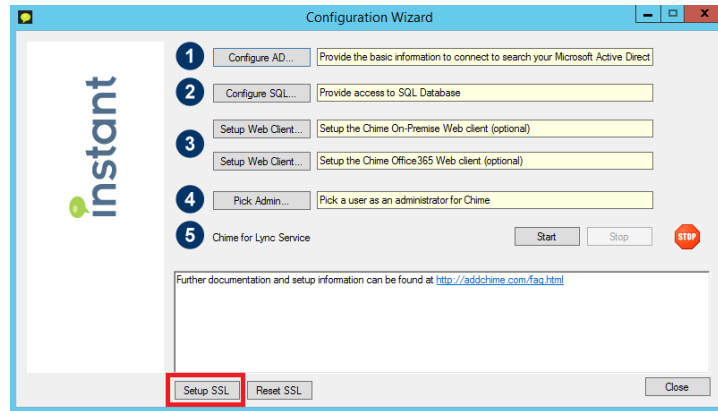


Figure 30: Configuration Wizard - SSL

2. Click through the prompts to register listeners for ports 80 and 443 (or click OK if already reserved).

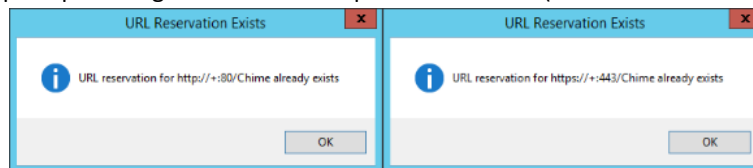


Figure 31: URL Reservations

3. Select the desired SSL Certificate from the list provided. Click on the desired certificate and click **OK** to try and use that certificate. If you don't see the certificate desired, click **Cancel**, and another list will be displayed.

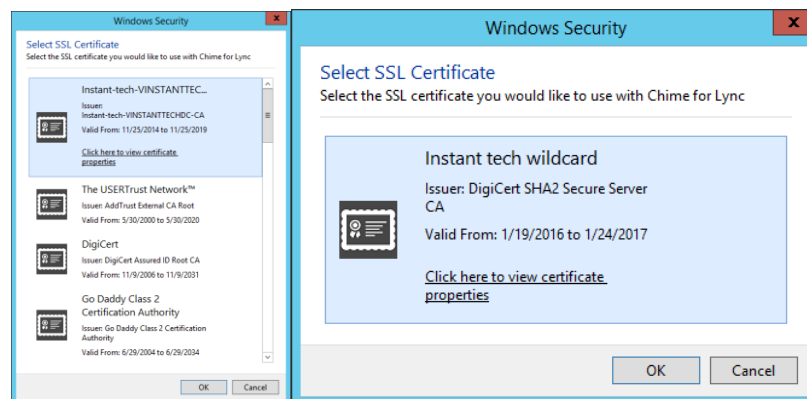


Figure 32: Selecting SSL Certificates

4. Click to **OK** to execute the command to register the SSL Certificate.

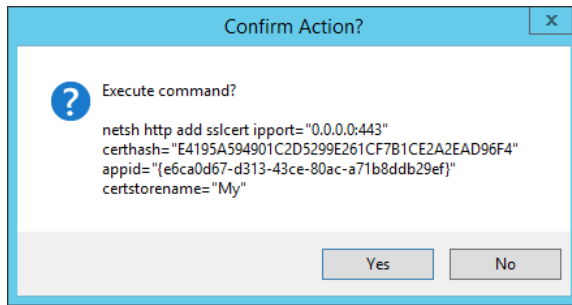


Figure 33: Executing SSL Command