instant

CHIME

MANAGER GUIDE

January 2022

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INTRODUCTION

This document is designed to help those who are configured as Managers in to learn all of the features available to them. We will provide information on how to fully configure Queues, manage Agents in the Queue, view reporting information included in Chime, and how to set up a Queue with routing tags and Suggestions.

This document is intended as a guide to help you fully utilize Chime. If you have any further questions, please contact us at support@instant-tech.com

OVERVIEW

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.

Chime utilizes the existing IM infrastructure deployed within an enterprise to help broker and establish a connection to what we call Queues. Each Queue has a set of properties that define how the Queue will send out alerts, listen for inbound requests, and route requests that are received.

Typically, a Queue will have the following important properties:

- List of people (**Agents**) who can provide assistance
- Dispatcher that connects the end users (**Guests**) to the Agents
- Set of properties to define how the Queue behaves (**Queue Settings**)
- 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
- **Interview** to make sure Guests route to the correct Queue or Agent

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ACCESSING 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 O365 credentials to proceed.

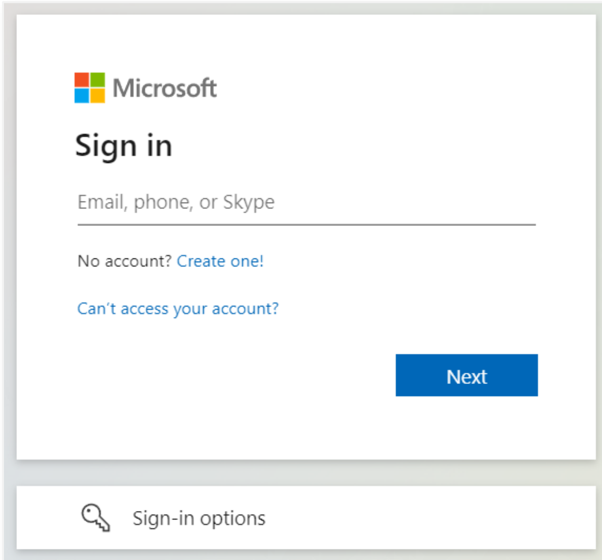

Figure 1: Windows Authenticated Login

To utilize the Manager features in Chime, you will first need to access one of the Queues that you are a Manager of. To start accessing and configuring Queues, go to the **My Manager Home** section at the top of the page, then click **Manage Queues**

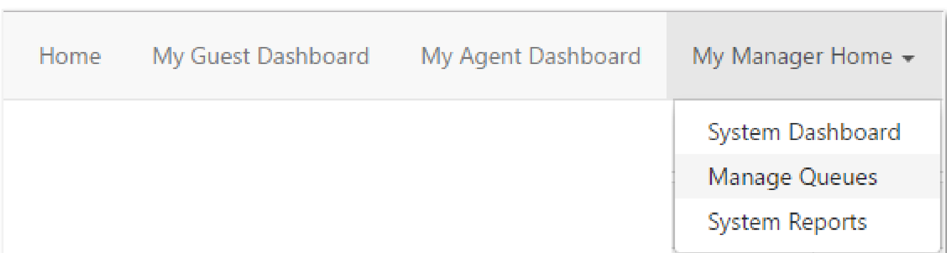

Figure 2: First look at Chime

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MY MANAGER HOME

My Manager Home page is where you can monitor, edit, and view reports for Queues within Chime. When you open one of the My Manager pages, Chime displays tools and information for the Queues you have been allocated to.

MANAGE QUEUES

The Manage Queues page is where you can edit the Queues you are assigned to in Chime. When navigating to the Manage Queues page, Chime displays all Queues that have been provisioned, as well as some high level information about each Queue. This page allows you to access Queue Settings and the Queue Dashboard of any Queue that you are provisioned as a Manager.

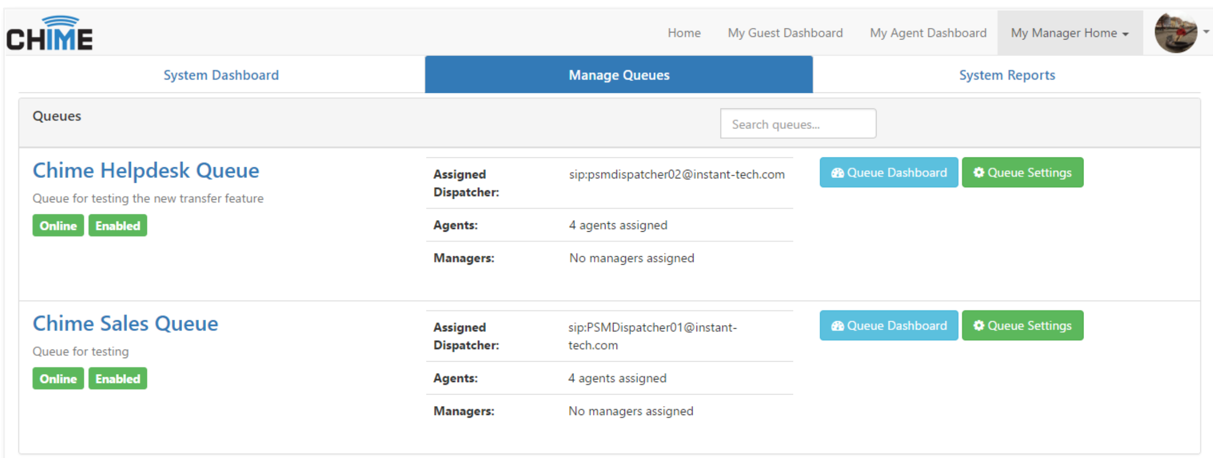

Figure 3: Manage Queues

SYSTEM DASHBOARD

The System Dashboard page is where you can view information on all of your Queues at once, such as the number of Agents online, average wait time for a guest, or the Queue states.

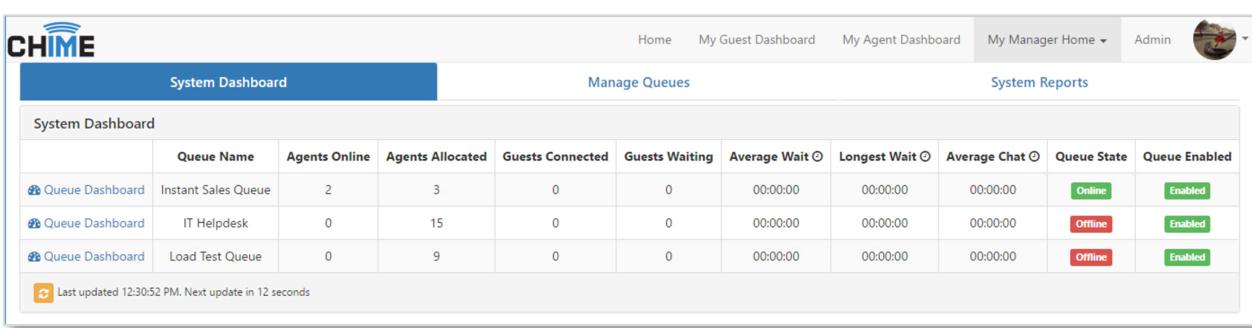

Figure 4: System Dashboard

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SYSTEM REPORTS

System Reports is the section of My Manager Home that you are able to look at the charts and metrics for all of the Queues you are a Manager. The System Reports section allows a Manager to have a comprehensive look at all of the data for the Queues they are managing.

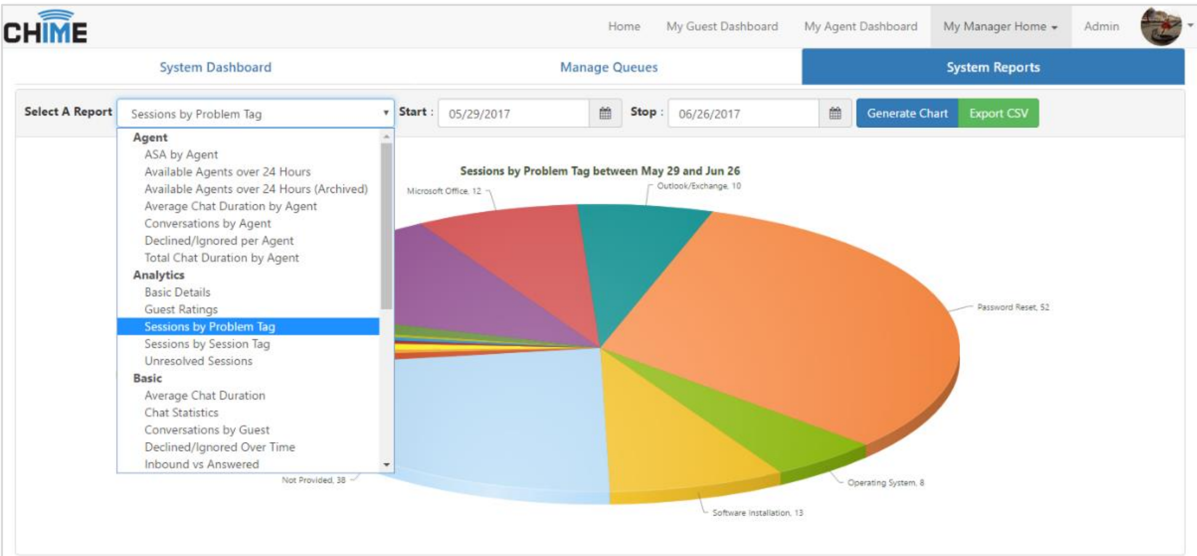

Figure 5: System Reports

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QUEUE SETTINGS

Queue Settings is the backbone of how the Queue runs. All settings tied to operation of the Queue can be found in the Queue Settings as well as the people who operate the Queue. The Queue Settings is divided into eleven different sections to make it easier to manage all of the settings: *Basic, People, Integration, Cognitive, Text Resources, Deflection, Routing, Schedule, Interview, Publish and Advanced.*

BASIC

In this section, Managers can edit the high-level Queue properties:

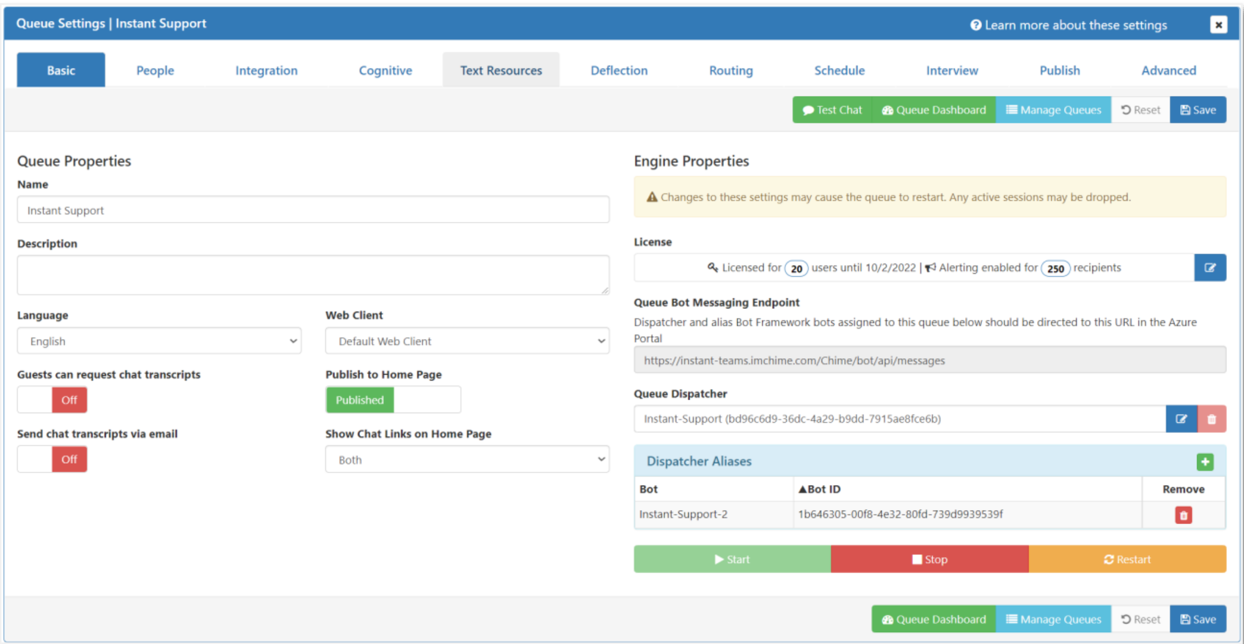

Figure 6: Editing a Queue

- **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 brief description of what the Queue is for
- **License**: Determines the number of Agents per Queue
- **Language**: Select the language of the Queue. **Note: this does not affect the UI in any way, it is primarily for labeling different language Queues**
- **Web Client**: Select the appropriate web client to use for the chats that come into the Queue
- **Queue Dispatcher**: Every Queue needs a dispatcher to send messages back and forth from Agents and Guests or to send out alerts from the Queue. This field allows you to add a dispatcher, change a dispatcher, or remove one all together
- **Dispatcher Aliases**: If you want agents to be able to be a part of multiple chats at once, you will want to add an additional Dispatcher to the Queue so they have another bot that they can accept chat sessions from

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- **Guests can request chat transcripts**: turning this option allows Guests to click a button in the chat and when it ends they will receive an email with the chat transcript
- **Send Chat Transcript Via Email**: Sends the Guest their conversation after the chat is finished when "On"; when "Off" it does not send
- **Publish To Home Page**: Makes the Queue visible to Guests on the Home Page when "Published" is selected, "Hidden" makes it not visible to Guests on the Home Page
- **Show Chat Links on Home Page**: When "Teams Only" is selected the Guest is given the option to chat over Microsoft Teams, when "Web Client Only" is selected gives the Guest the ability to chat over the Web Client. If "both" is selected bot appear on the Home Page and if "none" is selected neither is shown on the Home Page
- **Queue State**: Determines if the Queue is running or stopped
- **Restart**: If the Queue needs to be restarted this button provides an easy way to restart it. **Note: If the Queue is restarted all active chat sessions will be ended**

PEOPLE

The People section of Queue Settings is used to manage the different users that are a part of the Queue. From here you can add in users, change their role in the Queue, add or remove tags, change their chat priority, and determine if they are allowed to receive chat requests.

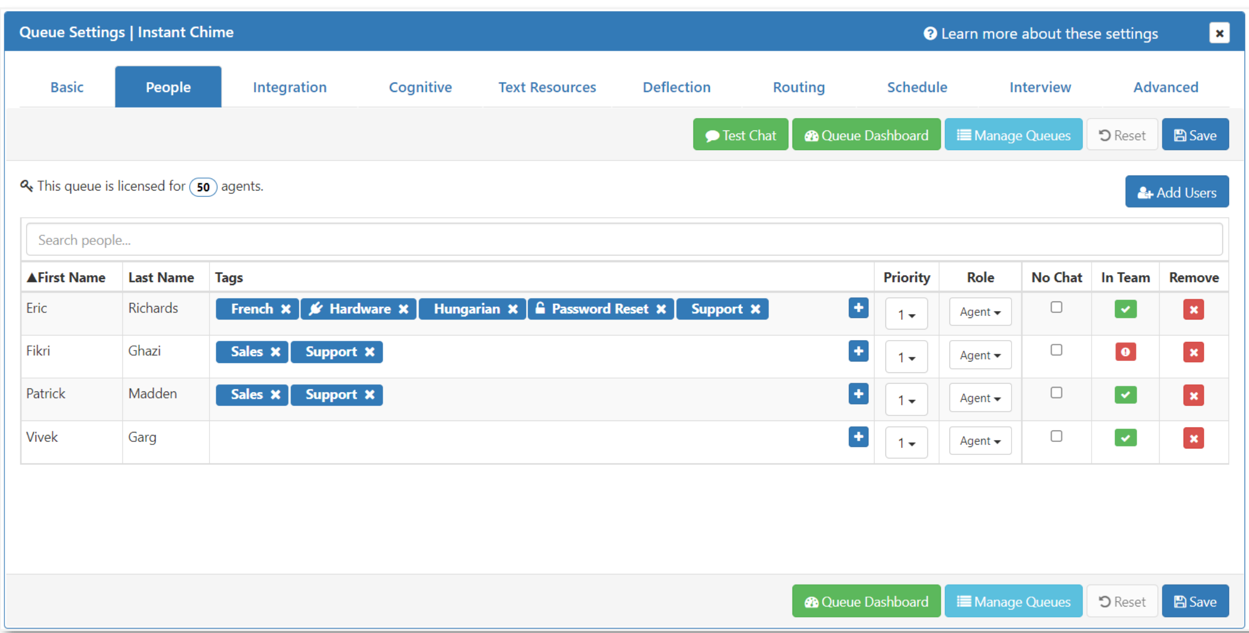

Figure 7: Queue Settings - People

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ADDING USERS

You can add people to the Queue by clicking on the **Add Users** button. This will open a picker that allows you to search through all of the people provisioned within Chime. To select users to add:

- Click the +next to their account name. Selecting a user will add them to the list on the right side of the window
- 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 **Add Users to Queue**, and they will instantly be added to the Queue

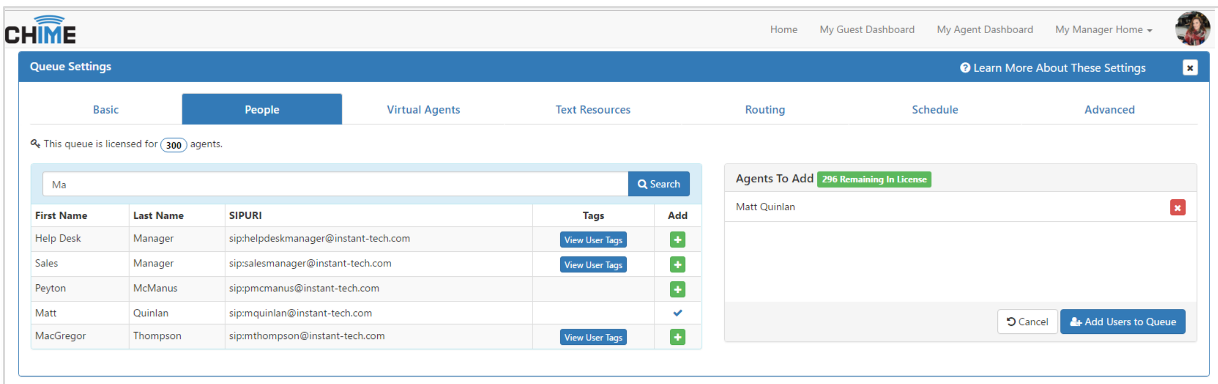

Figure 8: Adding Agents

EDITING USERS

After adding Users to the Queues, Managers can modify them by changing their role in the Queue, adding or removing tags, changing their chat priority, and determining if they are allowed to receive chat requests.

DETERMINING ROLES

Once a User has been added to the Queue, they can be assigned a User Role. There are three different roles for Queues that can be selected in the Role column:

Manager: Setting a person as a Manager allows that person to edit Queue settings and view the Queue dashboard and reports. A Manager has all of the capability of a reviewer, and an Agent, but also has the ability to modify the Queue properties and add/remove people from the Queue.

Reviewer: Setting a person as a Reviewer allows that person to view the Queue dashboard and reports, but not change any settings or properties. A reviewer has all of functionality of an Agent (can accept chats if required), but can also review chats and reports across an entire Queue.

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Agent: An Agent is a person who receives the chats sent out by a guest. The amount of Agents a Queue can have is determined by that Queues license key. In order for a Queue to receive and accept a chat, there must be at least one Agent (Reviewer, or Manager) online to receive it. Agents are not able to view the Queue dashboard, reports, or change any settings and properties.

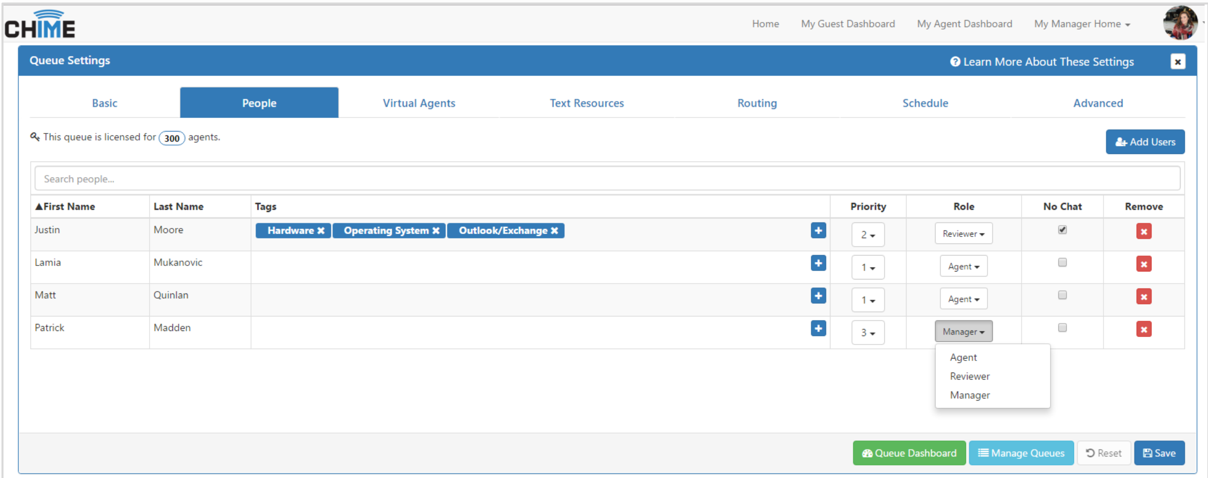

Figure 9: Determining Roles

By default, when a User is added into the Queue they will be assigned the Agent role. This is because most of the Users being added into the Queue will be Agents and will not be assigned to a higher role. After assigning roles to Users, you must click the **Save** button to avoid losing any changes you made.

TAGS

Tags are used to make specific customer problems go to specific Users that share the Tag associated to their issue. In most Adding Tags to Users allows them to be grouped together according to the customer problems. Managers are able to add Tags for Users by clicking the + button in the **Tags** column.

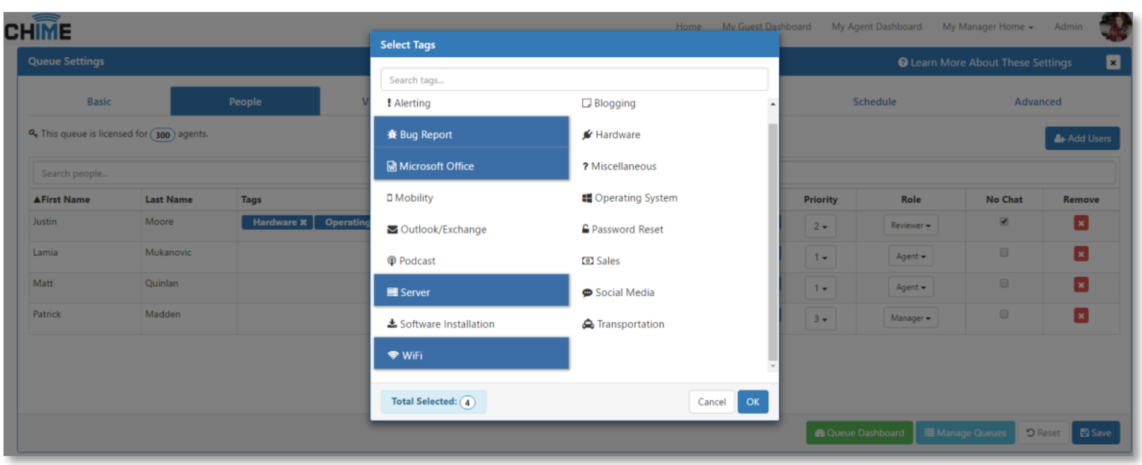

Figure 10: Adding Skill Tags

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Pick the Tags that you want to assign to the Users from the list of Tags that display in the window that pops up on the screen. When done picking Tags, simply click OK, and the tags will be added to the User

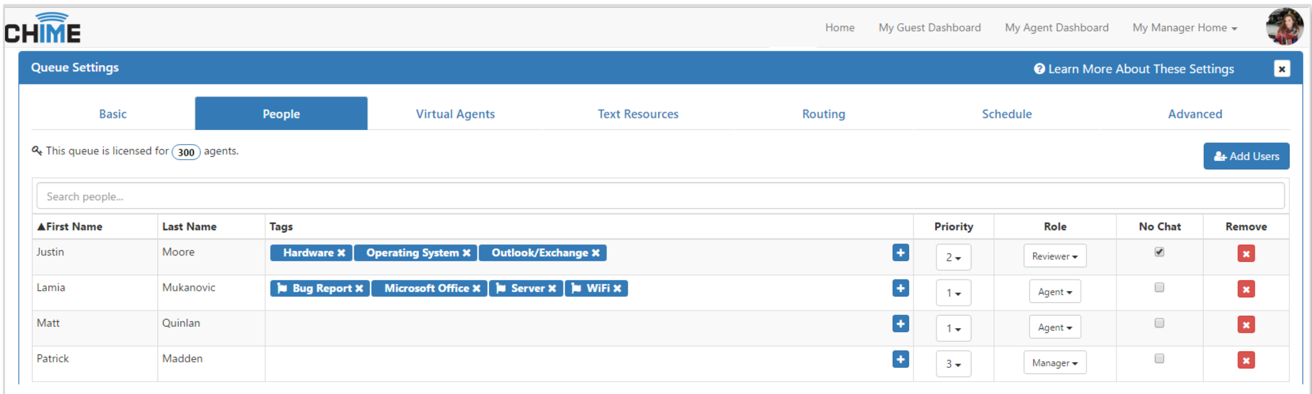

Figure 11: Skill Tags Added Figure

To delete a Tag that has been assigned to a User, simply click the X on the Tag that is associated with the User.

PRIORITY

After adding Users to the Queue, the priority level can be determined. The priority feature determines which Users receive chats first. Priority 1 has the highest priority and 3 is the lowest. For example, if chats are coming into the Queue and two agents are online, one with a priority of 1 and the other assigned a priority of 2, the User with priority 1 will receive all of the chats. The user with priority of 2 will only receive a chat when the first user is unavailable.

NO CHAT

The No Chat feature allows Managers to determine whether or not a user will be receiving chats. This is quite useful because often times Managers and Reviewers do not to receive chats at any point in time, so the No Chat option allows them to never receive chats.

REMOVING USERS

If a User needs to be removed from the Queue, simply click the X button on the very right of the row the User is on. Chime will ask you to confirm if you want to remove the User. Click **Remove** to remove the user from the Queue.

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INTEGRATION

The Integration page in Queue Settings allows you to add in either external bots or Virtual Agents. We typically see these added to help with pre-chat question resolution or for integrating with a ticketing system once a chat session has ended.

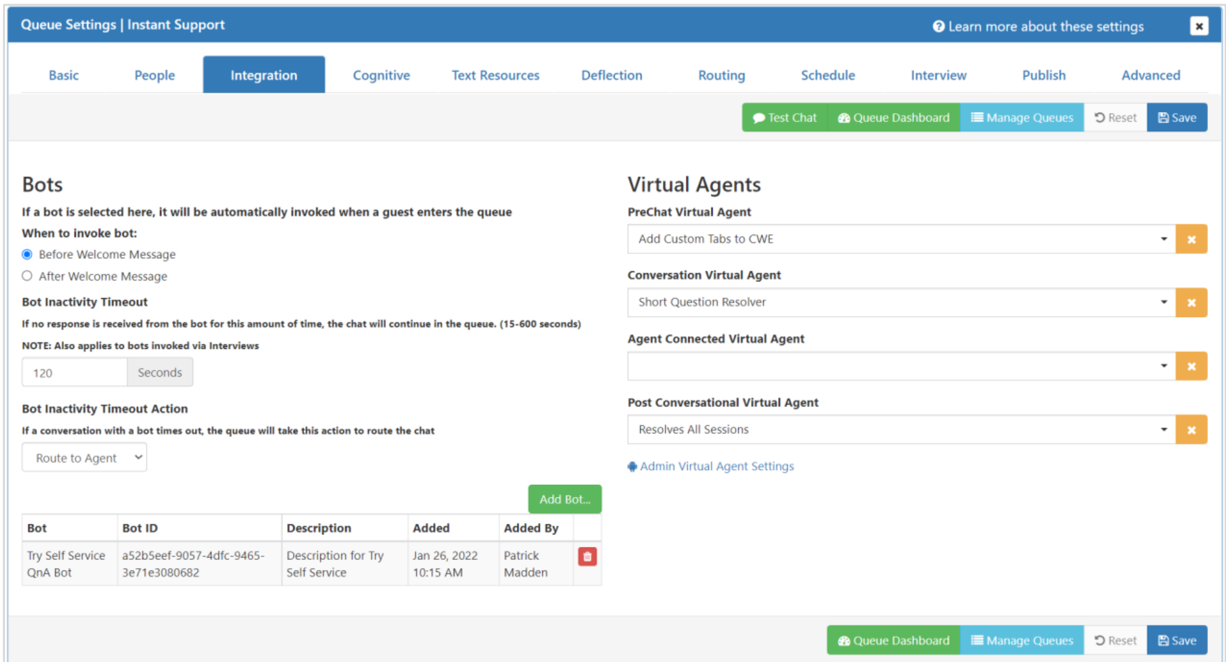

Figure 12: Added Pre-Chat Bot and Virtual Agents

To add in Bots and Virtual Agents, they will first need to be added into the Chime Admin area. Once they are added you will be able to access them in this menu.

SETTING UP A BOT

- Choose if you want the bot to invoke before or after the “Initial Welcome Message”
- Set the Bot Inactivity Timeout value
- Choose the Bot Inactivity Timeout Action (options are Route to Agent, Deflect Chat, and Transfer to Queue)
- Click the **Add Bot...** button
- Choose the bot you want to add from the list

SETTING UP VIRTUAL AGENTS

When a Virtual Agent is created, it will be one of 4 types of Virtual Agents. The different types are “PreChat”, “Conversational”, “Agent Connected”, and “Post Conversational”)

- Click on the dropdown for the Virtual Agent type that you want to add is
- Select the Virtual Agent you want to add
- Save the Settings

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COGNITIVE

The Cognitive Settings allow you to add in QnA Maker knowledge bases or configure text/sentiment analysis for chat sessions. **Note**: Both the knowledge base and sentiment analysis endpoint will need to be set up in the Chime Admin area.

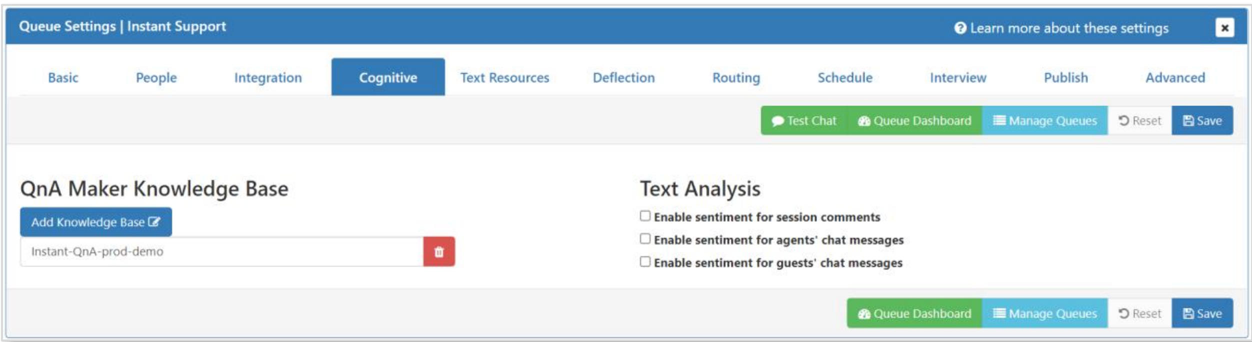

Figure 13: Cognitive Page

TEXT RESOURCES

Text Resources are customizable messages that Chime will use when connecting people via chat. Chime provides **System Variables** that can be used to provide live, up to date information within those text resources.

Chime now supports the use of Adaptive cards in Text Resources which provides easy to use, clean-looking UI that anyone can use to create a good chat flow for end users. In addition you can also use Razor syntax if you want to get more advanced with creating Text Resources.

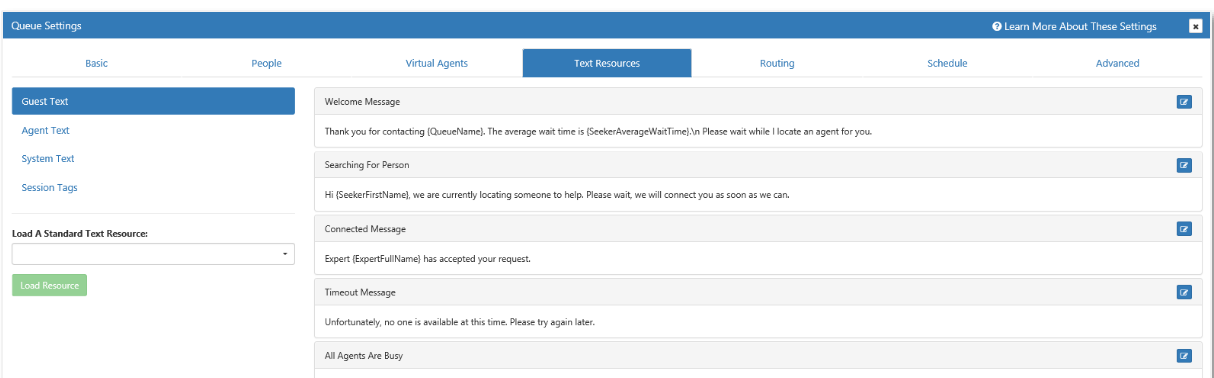

Figure 14: Queue Text Resources

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Chime comes with default text specified for all of the text resources. There are three different sections of text resources: **Guest Text, Expert Text, and System Text**.

- The **Guest Text** is where you will find text resources that will be sent to the guests when they encounter any activity within the Queue.
- The **Agent Text** is what Users 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 load in pre-made Text Resources to a Queue. Instead of using the text resources that are provided, you can choose a Text Resource created by Admin Users or by Instant-Tech. To load a Text Resource into a Queue, pick the desired standard Text Resource from the drop-down list, called **Load A Standard Text Resource** and click **Load Resource.** The appropriate text resources will be applied for all options. After editing any resources, you must click **Save** to apply the changes.

Additionally, you are able to import and export Text Resources from this same menu. If you want to copy the text resources over to another Queue or take a backup of the current text resources you can use the **Export Resource** button to download a JSON file that contains all of the Text Resources you have saved to the Queue. If you want to import the Text Resources to another Queue or reload them in the same Queue, simply click the **Import Resource** button and choose a JSON file with Text Resources loaded on it. If you request Instant-Tech to make some custom Text Resource changes for you, this is also how we will have you load in the changes we made on your behalf.

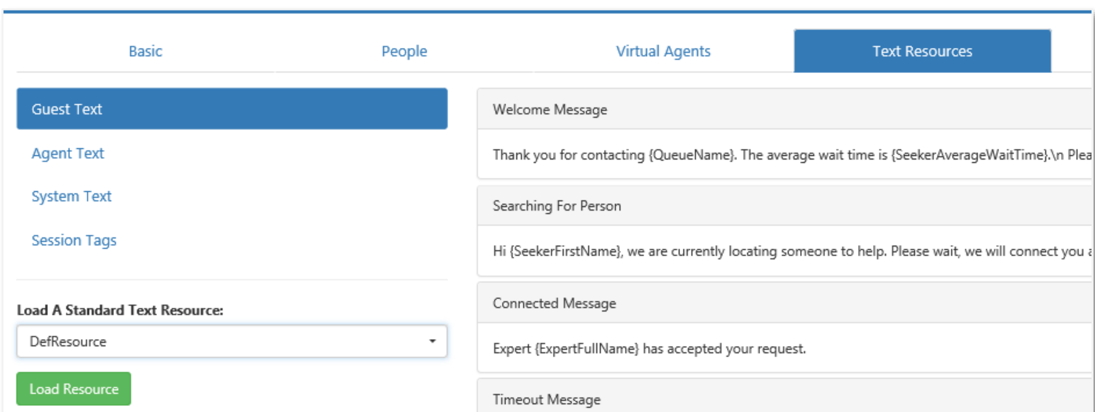

Figure 15: Apply Standard Text Resources

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CUSTOMIZING A TEXT RESOURCE

The text resource editor provides you with a list of system variables you can use, and the ability to preview what the formatted text will appear as once it is sent.

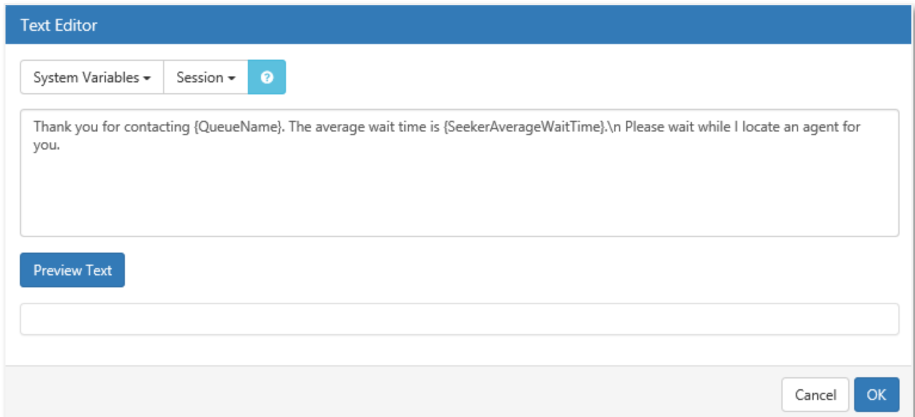

Figure 16: Customizing a Text Resource

1. Click the icon to edit a specific text resource. This will open the Text Editor modal.
2. Enter the text that you want to show for this specific text resource.
3. Click on the **System Variables** menu, if using any system variables.
4. Click **Preview Text** to show a preview of the text resource. The preview will also show an example of the system variables within the text resource.
5. Click **Save** once you are satisfied with the text resource.

USING ADAPTIVE CARDS

Adaptive cards allow you to have clean looking messages sent out to end users and Agents that have much more functionality than the standard plain-text messages that you can send.

- When you create or edit a Text Resource, click on the dropdown where it says **Plain Text** and select **Adaptive Card**.
- Click **Edit in Designer** to open up the Adaptive Card editor and create your own custom messages, forms, or branded messages.
- **Note**: in the Adaptive Card editor you can click the **Help** button and see the list of all System Variables and Guest data keys so that you can add System variables to messages or set the ID of a button or text input to data that is saved in Chime already.
- Once you have finished creating your Adaptive Card, Click the **Save Card** button
- When Chime prompts you to close the editor, click **OK**

For additional info on Adaptive cards you can use the following links as tools to assist you:

[Microsoft documentation for designing Adaptive Cards]

[Instant-Tech wiki with Text Resource Examples]

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UNING RAZOR SYNTAX IN ADAPTIVE CARDS

In addition to Adaptive Cards, you can use Razor syntax inside Adaptive Cards if you want to add in logic to make the cards more dynamic. Here are a few examples on how Razor syntax can improve your Adaptive Cards:

- Change the Text on a waiting message card for if a user is expecting to be waiting for minutes, seconds or you want to let them know an Agent will be there soon
- Get a list of all the Agents that may still be connected to a chat if one leaves the chat session
- Detect if a user's initial question was too short and ask them to provide a more descriptive question
- Change the styling of messages based on if the Guest is connected or waiting

For more information on Razor Syntax please read provided Microsoft documentation here

SESSION TAGS

Session tags allow you to attach certain keywords to specific chats. Session tags are created at a Queue level and agents can use session tags within chats in the Agent Context Window.

ADD A NEW SESSION TAG

1. Go to **Queue Settings**, then go to **Text Resources**, and click on the **Session Tags** tab within Text Resources.
2. Type in the name of the session tag you wish to create, and click on the + button. The session tag will immediately be added to the existing list of tags.

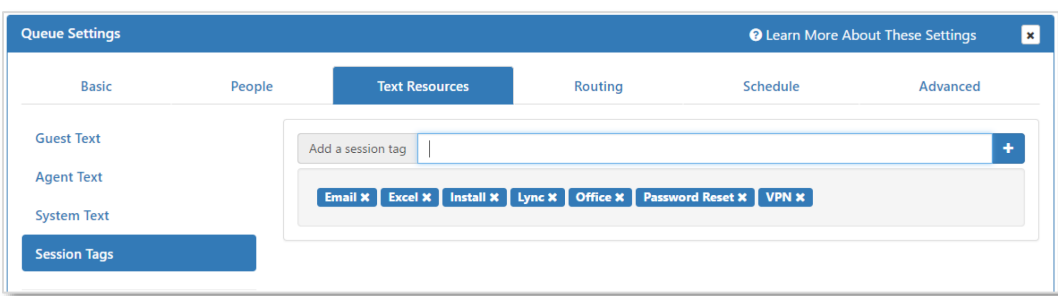

Figure 17: Customizing a Text Resource

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DEFLECTION

Deflection is a feature that can be used to ensure that the Queue is not getting too much traffic. It can be used if there are too many people coming into the Queue to limit how many users are waiting at once, or if there are specific days when the Queue shuts down early you can set it to not allow more users in.

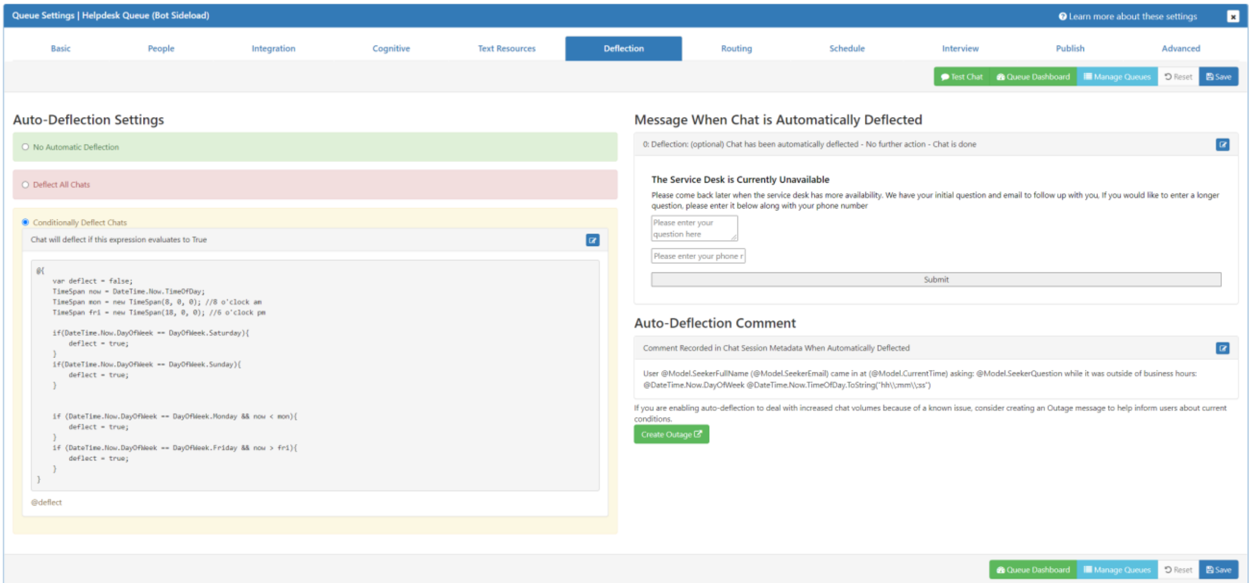

Figure 18: Deflection Page

On the left side, you can customize which deflection setting you want (No Deflection, Deflect all Chats, and Conditionally Deflect Chats). No Deflection and Deflect all Chats are fairly simple, but Conditional Deflection is much more complex and has many uses that cannot all be explained here.

The Conditional Deflection mode uses Razor code to evaluate if the user routing into the Queue needs to be let through or deflected. This can be done using any of the System Variables provided within Chime as well as any other variables available through using Razor.

To see some examples of Conditional Deflection see our Wiki [here]

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ROUTING

The Routing Method is how the Chime dispatches chat requests across Agents in a Queue. There are four routing methods: Hunt, Skill Best-Match Hunt, Longest Idle Hunt, and Broadcast. A Queue can have only one routing method setting, but this can be changed at any time under the routing tab in Queue settings.

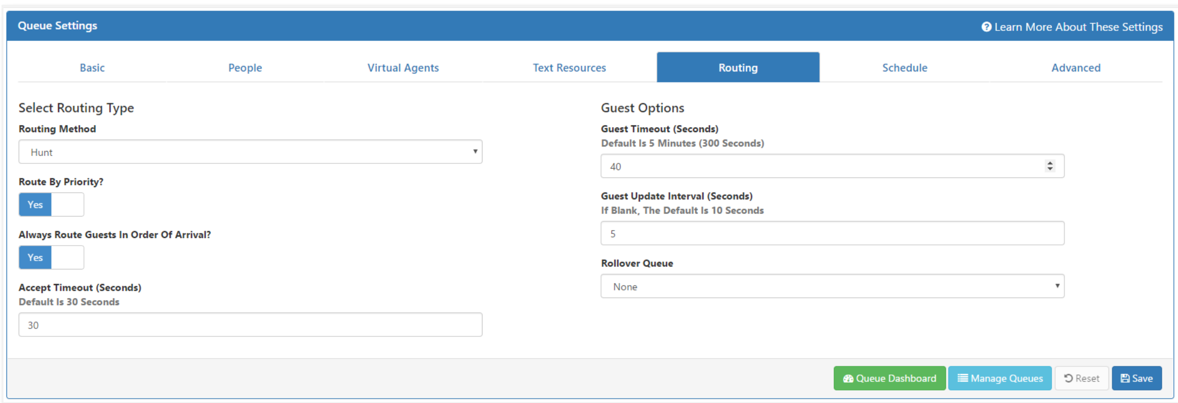

Figure 19: Routing tab in Queue Settings

STEPS BEFORE ROUTING

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

1. Get a list of all the Agents assigned in the Queue
2. Of the Agents assigned in the Queue, which Agents have an **Available** Teams status
3. Of the available Agents, which Agents are **not** at their **Maximum Concurrent** chat limit
4. Of the “not maxed-out right now” Agents, which Agents are **not** at their **Maximum Chats Per Day** limit
5. Of the “not maxed-out for the 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, are set to “No Chats” in Queue settings, or have disabled themselves from the Queue
6. 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 rout the chat to

ROUTING METHODS

TEAMS CHANNEL BROADCAST

When using the Broadcast routing method, Chime sends out an incoming chat request to all available Agents in the Queue at the same time. The Chat request will be sent to all agents in the Teams Channel as well as on the Chime Agent Dashboard. The Agent that accepts the request first is connected to the Guest and continues the chat conversation.

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TEAMS HUNT ROUTING

When using the Hunt routing method, Chime takes the Agents from step 6 (in Steps Before Routing, above) and looks at the number of active chats they have currently, then the total number of chats they have taken today. The Agent with the least number of active chats and 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. If **Route by Priority** is enabled, all Agents at priority 1 are processed first, then priority 2, priority 3, and so on.

Example: No Priority

Agent	Active Chats Right Now	Chats Today	Routing Pick
Jane	2	5	
Migumi	2	8	
Juan	1	10	X

Juan is picked because they have the least number of active chats. If Juan doesn't accept the chat, then Jane is routed to next because they have the least number of chats today of the remaining Agents.

Example: Route by Priority

Agent	Priority	Active Chats Right Now	Chats Today	Routing Pick
Jane	2	2	5	
Migumi	1	2	8	X
Juan	3	1	10	

Migumi is picked because they are the only Agent at priority 1.

ROUTING SETTINGS

Every Routing Method shares the same settings that can be configured and applied to enhance the routing for Guests as well as Agents.

Route By Priority?

- This option determines whether or not Guests will route to People in the Queue based on their priority. Routing by Priority is explained in the previous section, this simply determines if it this setting will be turned on or off.

Always Route Guests In Order Of Arrival?

- This option allows Managers to decide the order that Guests will route to Agents. If this Setting is turned on, the Guests will be routed to Agents in order of Arrival which means when a guest enters the Queue, they will not route to an Agent until all of the Guests ahead of them have already routed to an Agent.

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- If this setting is turned off, all Guests will be trying to route to Agents at the same time. This is faster for the most part, but the Guest waiting the longest might not always be the first to get connected to an Agent.

Accept Timeout (Seconds)

- The value set here is what determines the amount of time the agent is given to accept a chat that goes to them. If the agent accepts the chat within this time window they will be connected to the Guest, if they do not accept it within this time window, it will route to another Agent. By Default this is set to 30 seconds.

Guest Timeout (Seconds)

- This setting determines how long a Guest is able to wait before being timed out. If the Guest waits for the full time period listed here, their chat will be ended and they will be notified that nobody was able to accept their chat. By default this setting is set to 300 Seconds.
  Note: It is recommended that the value of this setting is greater than the value of the Accept Timeout value. If it is not, it is possible that the Guest will time out before more than one agent gets a chance to accept the chat.

Guest Update Interval (Seconds)

- This setting controls how often the Guest will see the "Searching For Person" message from the Queue. By default it is set to 10 seconds.

Rollover Queue

- This option allows the Manager to determine if Guests from the Queue will be rolled over to another Queue if they Time Out while routing. The Dropdown there will display all of the other Queues that can be routed to. By Default, the Guests will not Rollover to another Queue.

ROUTING TAGS

When the Skill Best-Match Hunt method is chosen, there is an area to define Queue-level routing tags. These will appear automatically on the Guest Landing Page (home page) if the Queue setting is set to "Publish to Home Page" (This setting can be found on the Basic tab of Queue Settings).

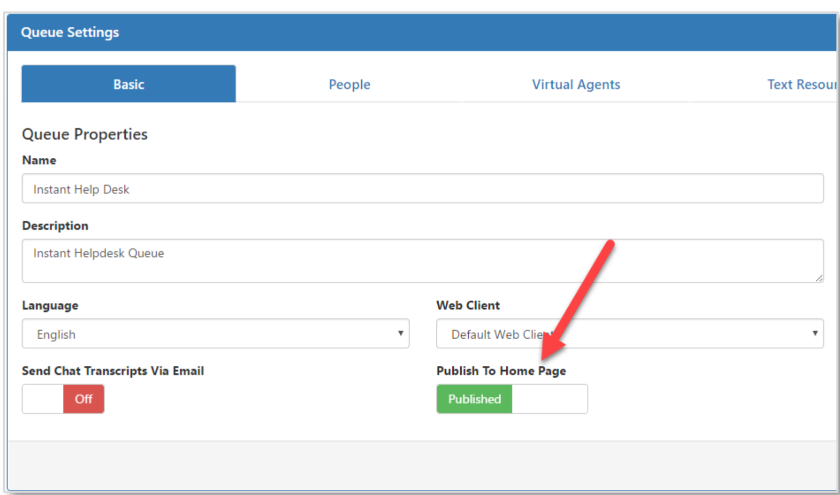

Figure 20: Publish Queue to Home Page

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To add in Tags that will display on the Home page, click the **Add Tags** button. This will bring up a modal that has a list of all the tags that have been created on Chime. Select all of the Tags that should be added to the Queue, then click the **OK** button.

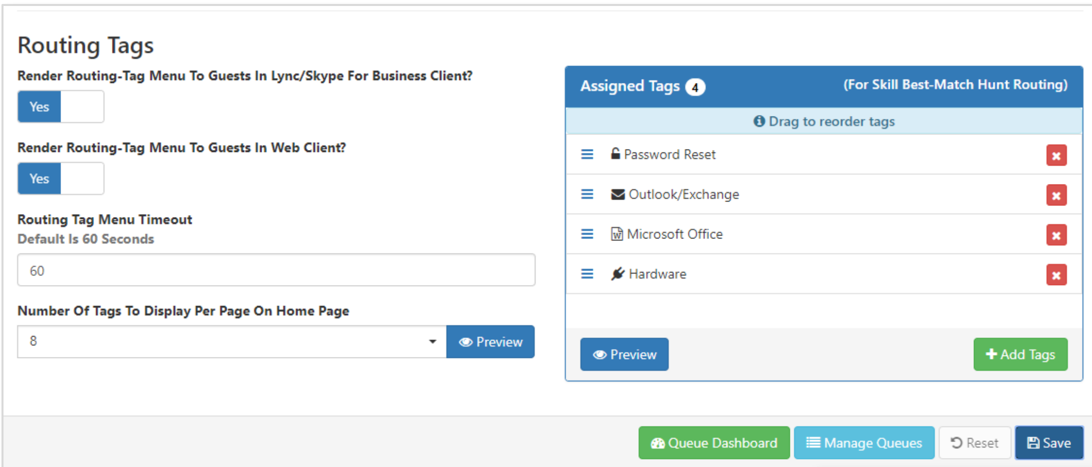

Figure 21: Queue Settings for Routing Tags

Once Tags have been added in, you can reorder how they display on the Home Page by using the drag and drop feature. The preview button allows you to get a sneak peak of what the home page will look like when you

Additionally there are a few settings that you can configure to completely customize the way Guests interact with the Routing Tags:

Render Routing-Tag Menu To Guests In Teams Client?

- This option allows you to decide if users who start a chat on the Queue using Teams will be prompted to select a Tag.
- When set to Yes, the Guest will be prompted to enter in a tag that is associated with their question. When set to No, the Guest will never be prompted to enter in anything and will route directly to an agent.

Render Routing-Tag Menu To Guests In Web Client?

- This option allows you to decide if users who start a chat on the Queue the Web Client will be prompted to select a Tag.
- When set to Yes, the Guest will be prompted with a drop-down field in the pre-chat form to enter in a tag that is associated with their question. If the Guest ignores the drop-down, and starts the chat, they will be prompted to enter in a tag that is associated with their question. When set to No, the Guest will never be prompted to enter in anything and will route directly to an agent.

Routing Tag Menu Timeout

- This setting allows you to configure the timeout value for the Routing Tag Menu. This setting determines how long the Guest has to enter in their selection in the Routing Tag Menu. If the Guest does not enter a valid response in this time frame, they will be automatically routed to an Agent.

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Number Of Tags To Display Per Page On Home Page

- This setting determines how many routing tags will display on the Home page for the Guest. You can choose from either 8, 16 or All. If you have more tags than the option you select, the Home Page will be divided into multiple pages that the Guest can go through to find all of the tags available.

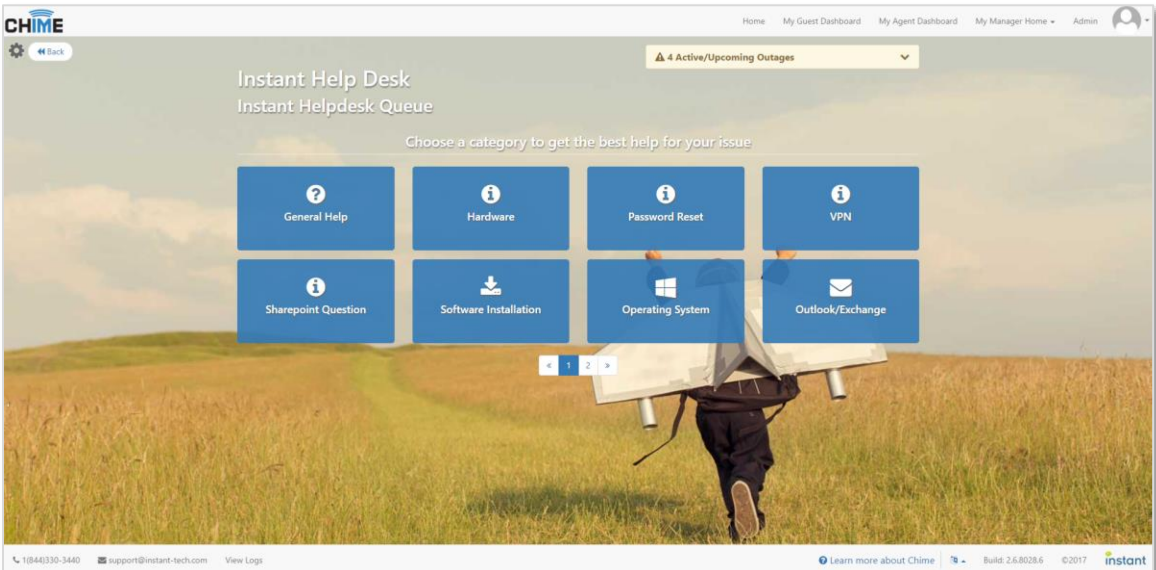

Figure 22: Guest Landing Page with Routing Tags

The routing tags show up as an IVR-style menu in the guests' chat client if either of the following settings are ON. The text resources "Routing Tag Menu Greeting", "Routing Tag Menu Option 0", and "Routing Tag Menu Invalid Response" are used to create the menu text. Guests select a routing tag by choosing a number from the menu.

- Render Routing-Tag Menu To Guests In Teams client?
  - The routing tags assigned to the Queue are shown to guests using the Teams client.
- Render Routing-Tag Menu To Guests In Web Client?
  - The routing tags assigned to the Queue are shown to guests using the Web Client. If a routing tag has already been assigned, for example, from the pre-chat form or the guest landing page routing areas, then the routing tag menu is not shown.

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SCHEDULE

The times when a Queue is online is really important to be able to control. Chime supports two modes that allow you to control when the Queue is online and when it is offline; **Based on Availability** and **Based on Schedule.** Additionally, there is a setting called **Always On Mode,** which ignores the settings of the other two modes and keeps the Queue online all the time.

BASED ON AVAILABILITY

The Based on Availability Mode allows the Queue to be online as long as there is at least one Chat-Enabled User online. Over the course of the day the Queue can go online and offline based on how many agents are working.

BASED ON SCHEDULE

The Based on Schedule Mode allows Managers to decide when the Queue will be online. If the Queue is only supposed to be available during certain hours, this Mode is quite useful to limit the Queue to being online only during those specified hours.

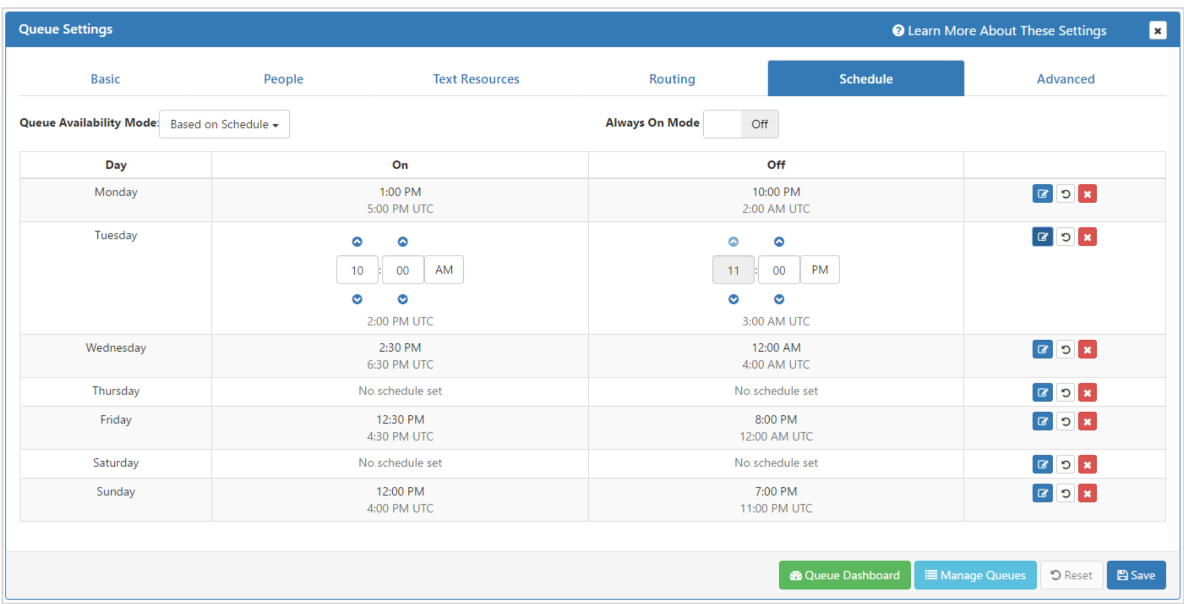

Figure 23: Queue Schedule

To set up times for the Schedule:

1. Click the  icon for the day you want to set a time for
2. Type in the time you want to set, or use the up and down arrows to determine the time for the On and Off times.
3. Set the times necessary for each day
4. Click the **Save** button to confirm all of the changes you made.

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INTERVIEW

CREATING AN INTERVIEW

To begin creating an interview you will first need to navigate to the settings area of the queue. To do this:

1. Click **My Manager Home** on the top nav bar, then select **Manage Queues**.
2. Click the **Queue Settings** button for the queue you would like to create the interview for.
3. Navigate to the **Interview** tab in Queue Settings.

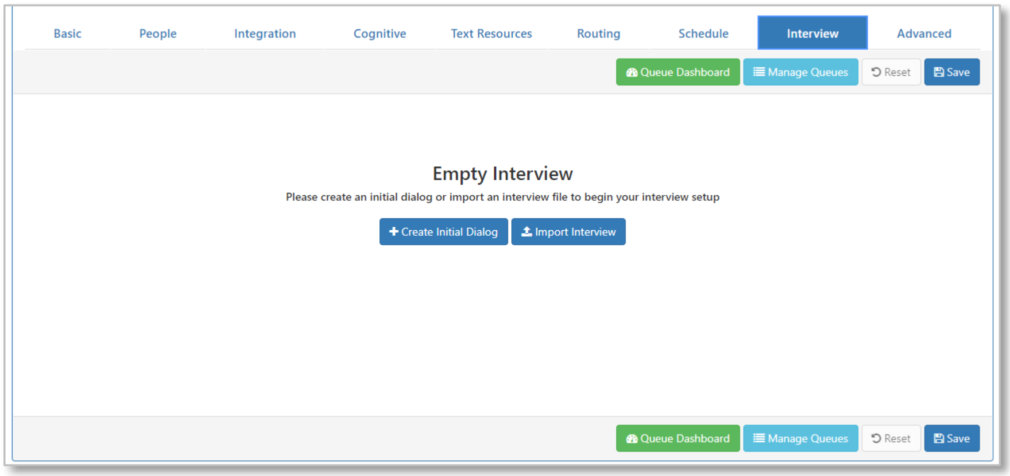

Figure 24: Empty Interview Page

4. Initially the interview will be empty and you have the option to either **Create Initial Dialog** or to **Import Interview** (this option will be covered later)
5. Click **Create Initial Dialog**
6. Enter the name for your initial interview dialog

SETTING UP THE DIALOG

1. On the left, select the dialog you just named as the **Initial Dialog**

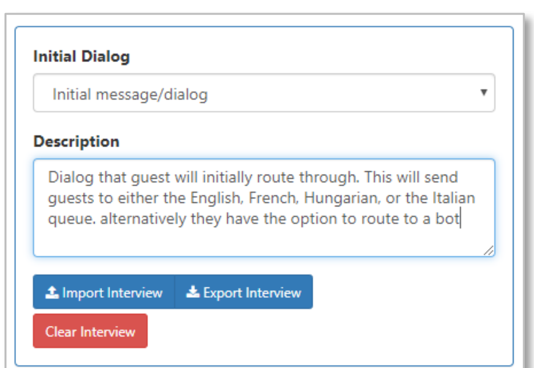

Figure 25: Initial Dialog and Description

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2. Add a description of the dialog
3. Click on the dialog to get customization options

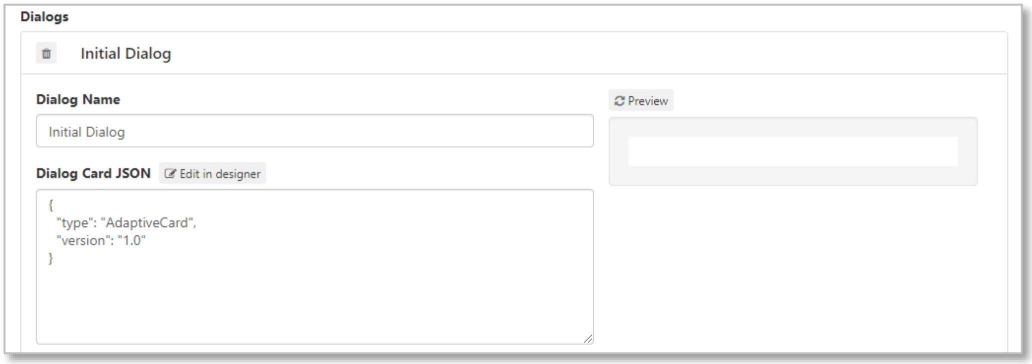

Figure 26: Empty Dialog Editor

4. If you have the JSON you wish to use for the adaptive card, add it into the text editor, otherwise, use the **Edit in Designer** option to customize the card.
5. In the designer, to create the simplest greetings message, drag the TextBlock element into the empty adaptive card

Figure 27: Adaptive Card Designer - Text Element

6. Then, enter the greeting text that you want.

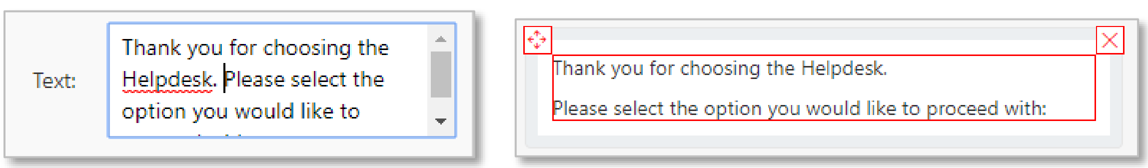

Figure 28: Adaptive Card Designer – Text Field

7. Click Save Card. This will autofill the JSON into adaptive card dialog

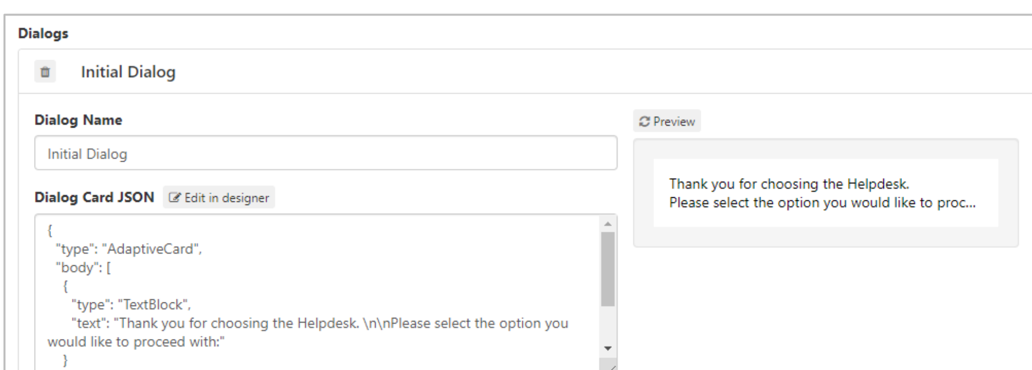

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Figure 29: Filled Dialog JSON

INTERVIEW CHOICES

After the initial dialog's message is created, you are able to set up the choices they can pick from.

Figure 30: Empty Dialog Editor

You can choose to display these options as either ratio buttons, a combo box, or as a list of buttons. Each choice needs a name. This name is what the guest will see for the option. Additionally, you must choose an action to go with the choice once they submit the card. If you would like additional choices, click the **Add New Choice** button to add another choice to customize.

INTERVIEW ACTIONS

When creating an interview you have a number of different actions you can perform in the interview. Here is a list of what each option does.

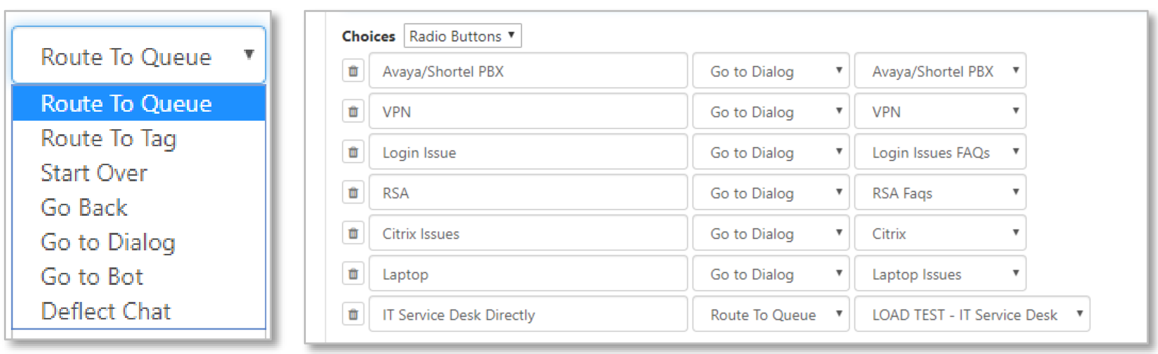

Figure 31: Select Dialog Actions

ROUTE TO QUEUE

Allows you choose to route the guest to a different queue. Typically used to route the guest to a different language queue.

ROUTE TO TAG

Assigns the chosen routing tag to the guest and then routes them into the queue to be picked up by an agent with the matching skill tag.

START OVER

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Sends the Guest back to the very start of the interview chain. Typically used from a second or third level dialog option

GO BACK

Returns the Guest to the dialog they were previously on. To use this option you must have already created an additional dialog by using the **Add New Dialog** button

GO TO DIALOG

This moves the guest to a specific dialog. This can send to a dialog farther down the tree or to one on the same level or higher up. To use this option you must have already created an additional dialog by using the **Add New Dialog** button

GO TO BOT

Sends the guest to a self service bot of your choice. The bot can then send the user back into the queue, or deflect the chat session on its own.

DEFLECT CHAT

Ends the chat session for the guest and moves the conversation into the deflected state. Used for situations where the interview is able to solve the issue for the guest.

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INTERVIEW TREE PREVIEW

In the Interview - Settings area, there is an option to **View Interview Tree**. If you click this button you will see a visualization of the interview from the initial dialog down to the sub-dialogs and the different outcomes for each interview path. To return to the Interview – Settings click the **Settings** button.

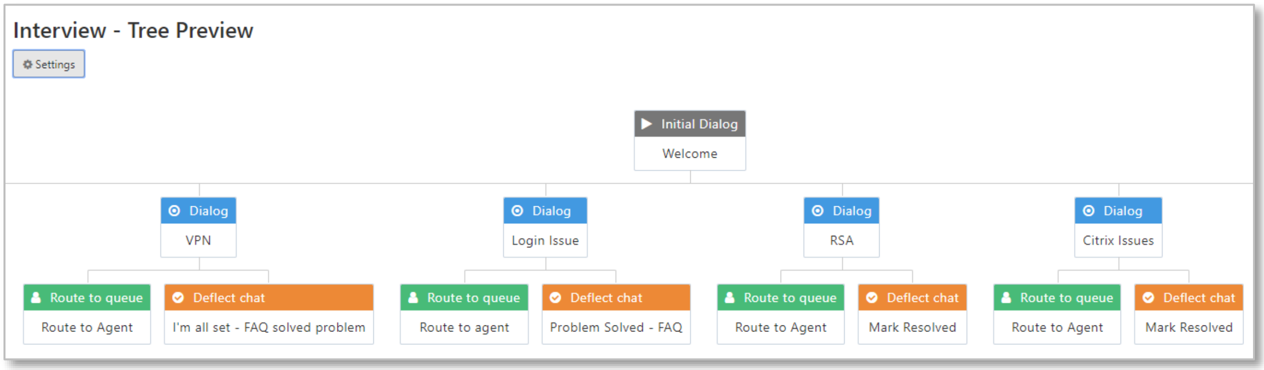

Figure 32: Interview Tree

IMPORTING AND EXPORTING AN INTERVIEW

On the left side of the Settings page there are three options below the Initial Dialog and Description settings. Import Interview, Export Interview, and Clear Interview

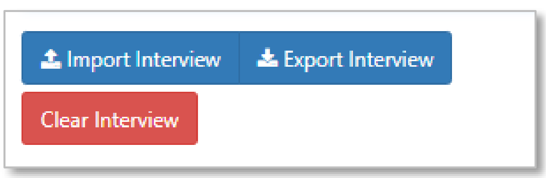

Figure 33: Import Export Clear Buttons

EXPORT INTERVIEW

Allows you to create a JSON file containing all of the data needed to build the interview on another queue, or on a different server. Often times we will create interviews and export them for customers for example.

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IMPORT INTERVIEW

This opens a file explorer where you can choose to import a previously exported interview and add it to the queue. Very useful if you want to reuse interviews on multiple queues or to make slight changes like text resource language etc…

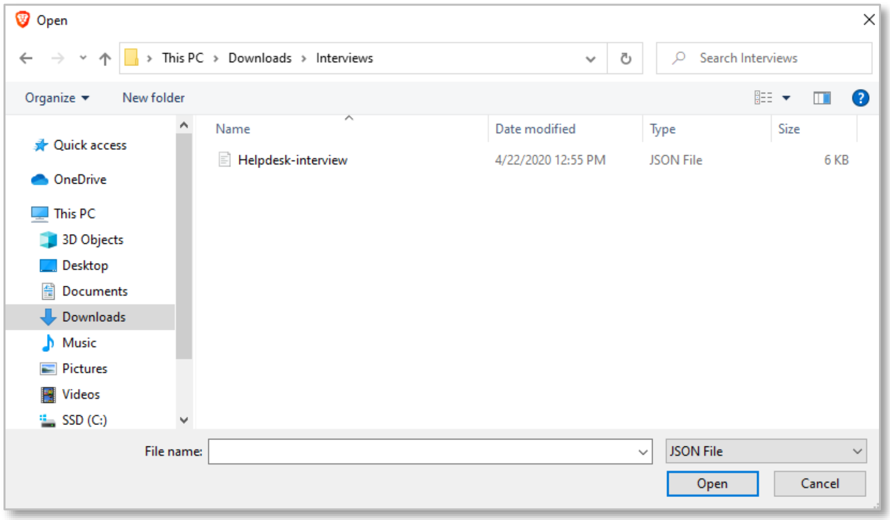

Figure 34: Import Interview JSON

CLEAR INTERVIEW

Clears all of the data for the dialogs and resets back to the empty interview.

PUBLISH

The Publish Tab allows you to customize and export a manifest file that will be used to set up your Chime Queue in Teams. This allows you to edit the manifest files for all of the different dispatcher bots that you might have set up for a Queue.

ADVANCED

The advanced settings section allows Managers to configure things such as Queue target values and chat settings:

Target ASA: Entering a number in this field will set a target value for Average Speed to Answer metrics and will display in any reports associated with the ASA in the Charts and Metrics area.

Target Chat Concurrency: This will set a target value for chat concurrency or number of chats being handled at once. This will display in any reports associated with the chat concurrency in the Charts and Metrics area.

Target Average Chat Duration (Seconds): This sets a target value for chat duration. This display in any reports associated with the Chat Duration in the Charts and Metrics area.

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CC/Web Chat Offline Email: This email address will receive chat transcripts, and also information gathered from the Guest when the web client/Queue is offline.

Use Dispatcher Email: Determines whether or not to use the email address associated with the Dispatcher to dispatch emails. **Note:** This email must be SMTP enabled to send emails; if it is not SMTP enabled the emails will fail to send.

Dispatcher Email Address: The email address associated with the Queue's Dispatcher.

Send Email When A Guest Times Out: The email address below will receive an email when a Guest's times out while waiting to be routed to an Agent. Below this you are also able to customize the Email Subject and Message that will be sent when the Guest times out.

Upload New Photo: Uploading a picture here will change the image of the Queue that Guest will see on the Home Page and in the Web Client.

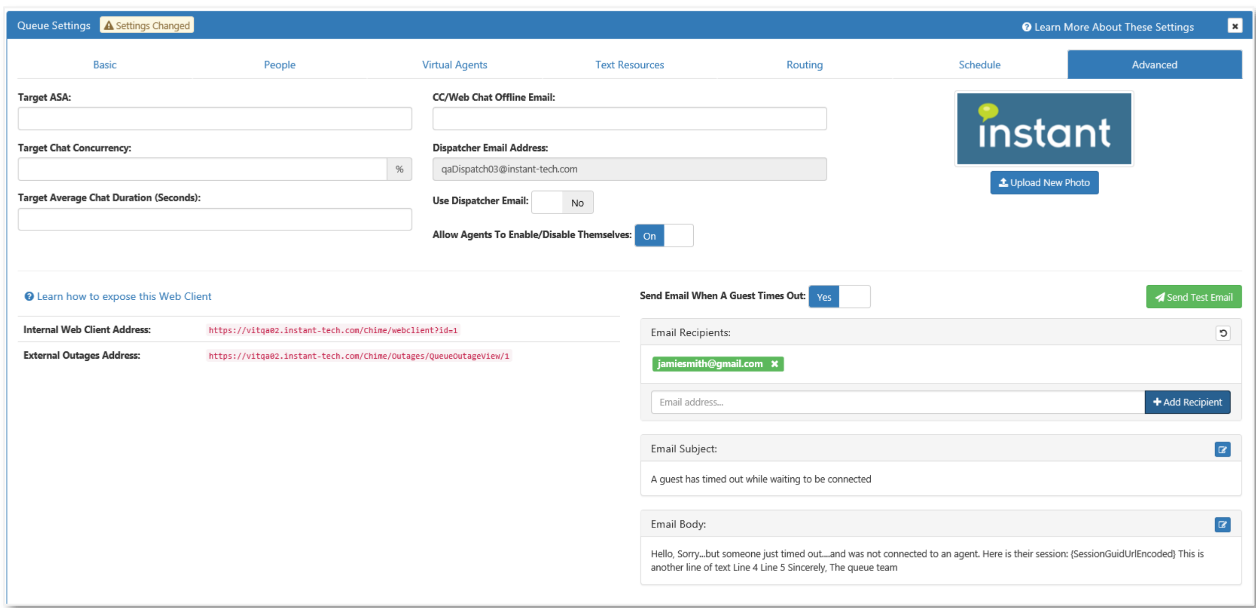

Figure 35: Advanced Queue Settings

QUEUE DASHBOARD

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. To get to the Queue Dashboard

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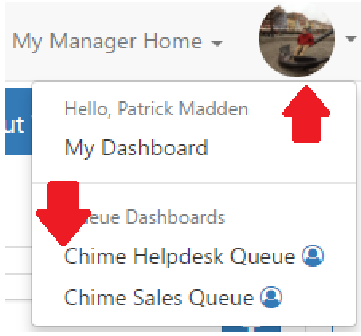

Figure 36: Connected Chat on Monitor

On the top right, under Desk Agents, there is a blue **Refresh** button. This manually refreshes the Teams statuses of the agents assigened to that Queue.

ACTIVE AGENT CHATS

While Agents are in chats, Managers are able to see live data on the Monitor section of the Queue Dashboard. In addition, Managers are able to see chat history under the Details section in Queue settings. Active Agent chat gives Managers insight on chats between the Agents and Guest.

MONITOR SECTION

The Monitor page shows all guests who have sent out a request and are currently waiting, and all guests who are connected to a chat with an agent. There is a date filter to check for stuck chats from previous days.

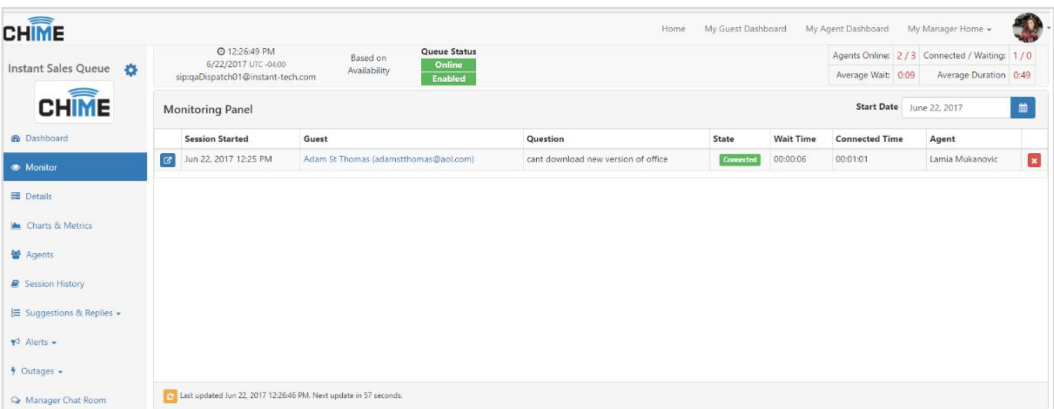

Figure 37: Connected Chat on Monitor

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DETAILS SECTION

The Details page shows all chats that have been created in that Queue that day. You can filter the chats by All, Connected, Waiting, Dropped, Disconnected, Completed, Timed Out, Rolled Over, and Queue Unavailable. Additionally, you can access the Details of the chat as well as the Chat history of the Guest. There is a date filter to access chats from that Queue across a certain time frame.

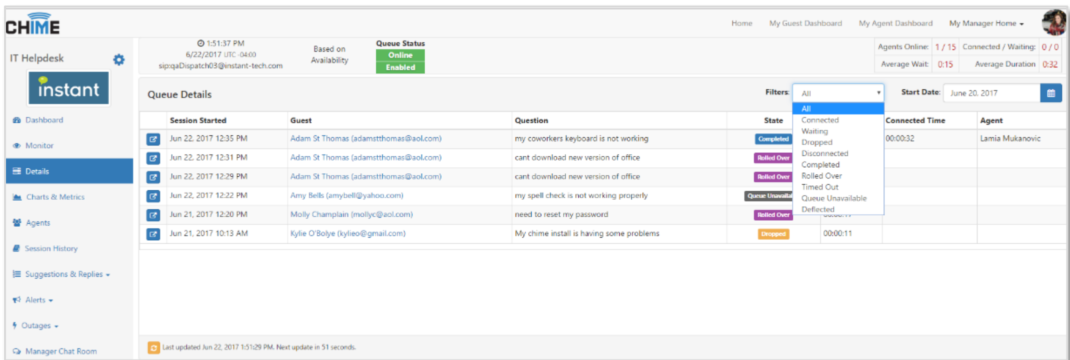

Figure 38: Filters on Details Section

CHARTS & METRICS

The Charts and Metrics page shows statistics and graphs for a specific Queue, which is customizable by length of time. In addition, all of the graphs can be exported as CSV (Common Separated Values). There are 4 subcategories of Charts and Metrics:

1. Basic Statistics- Provides line and bar graphs to help visualize the general statistics on chats started for the Queue.
2. Performance Metrics- Shows statistics on Agent rating and effectiveness, as well as how smoothly the Queue is functioning.
3. Agent Efficiency and Load- Statistics on Agents in the Queue.
4. Text Analytics- Statistics on the Seeker questions and how the Queue is used.

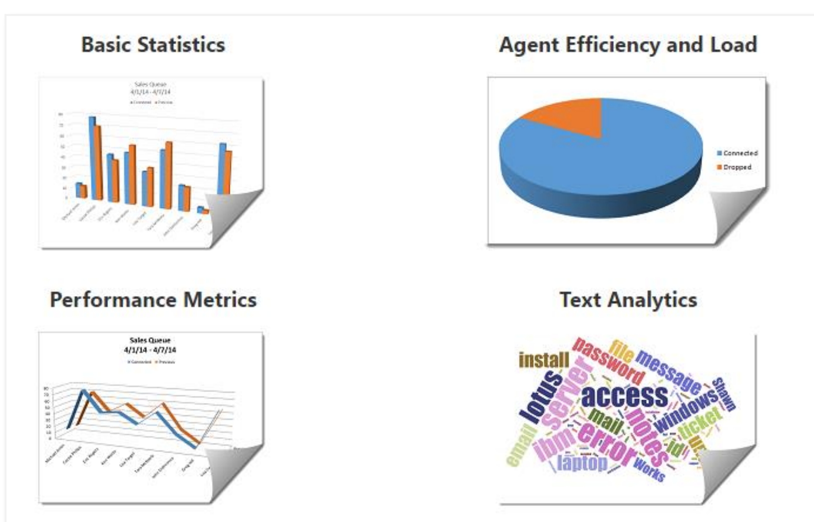

Figure 39: Charts & Metrics

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BASIC STATISTICS

This section allows for Managers to view charts and report for a certain time period for their Queue. There is a drop down menu for various types of charts. All of the Charts and Reports in here are designed to give high-level information about the Queue.

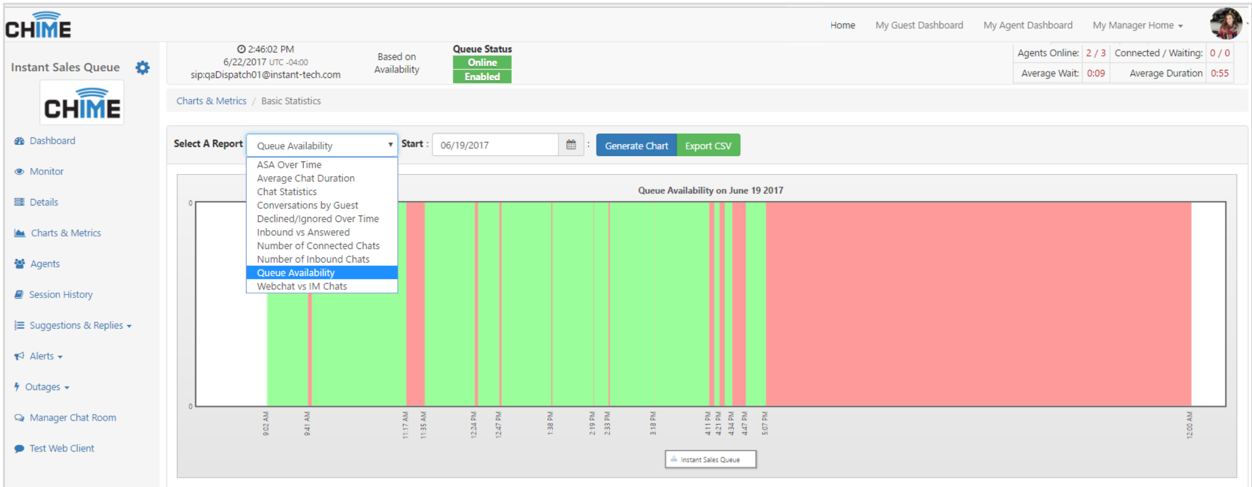

Figure 40: Queue Availability Chart

PERFORMANCE METRICS

This area is about the Agent ratings and how well the Agents are Helping the Guests and how often the Agents are Taking Concurrent Chats.

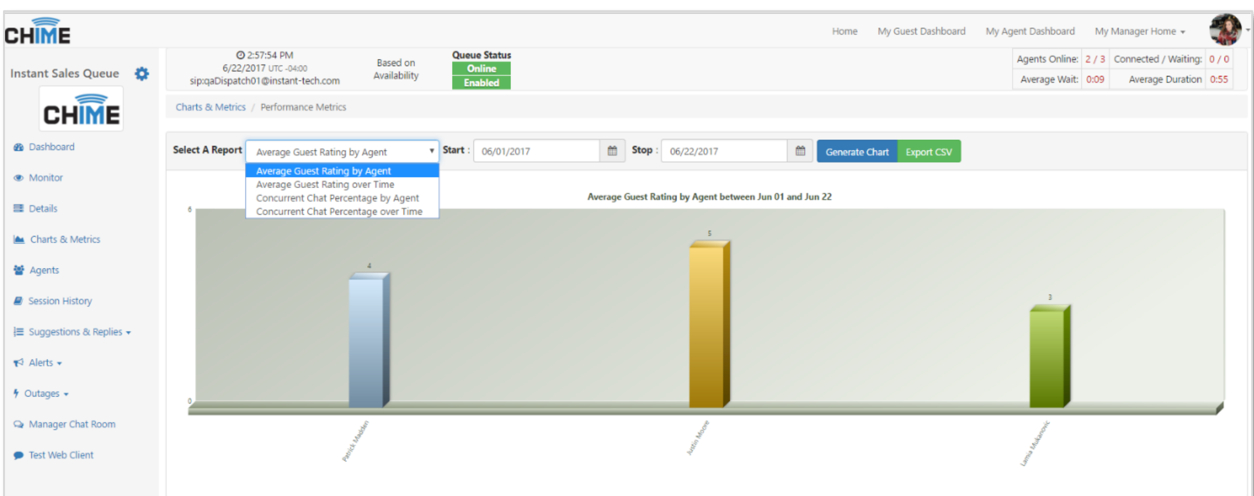

Figure 41: Average Guest Rating by Agent Chart

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AGENT EFFICIENCY AND LOAD

This area is about the ability of different Agents in the Queue. It allows you to view the availability, speed to answer, and number of conversations to name a few of the reports.

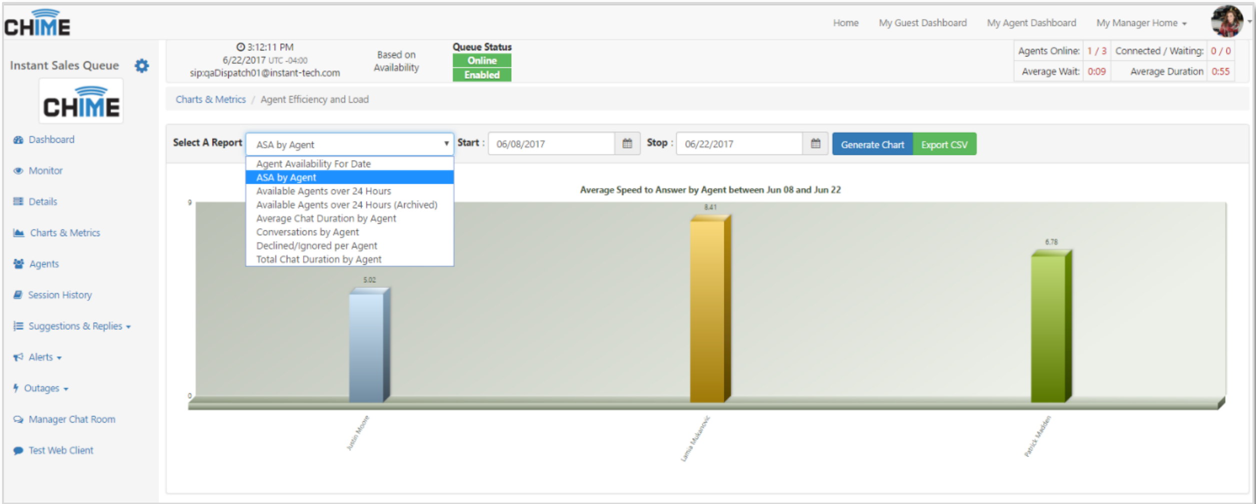

Figure 42: Average Speed to Answer by Agent Chart

TEXT ANALYTICS

In this section it shows the trends inside the Queues. This allows you to see if the Queue is improving over time, and it allows you to seed the trends of questions coming into the Queue so you can adjust resources as necessary to answer these questions.

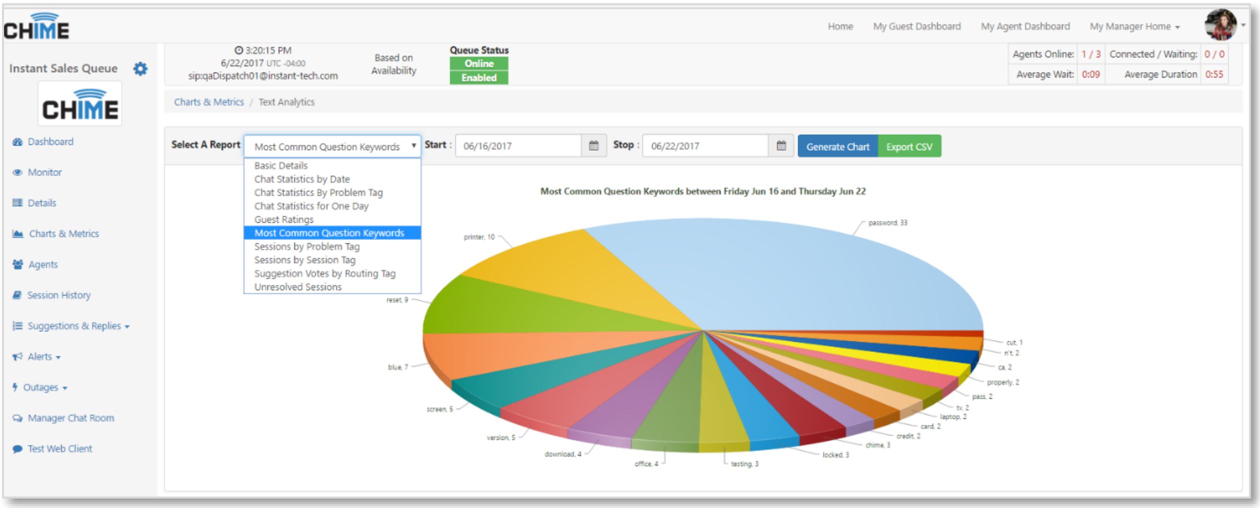

Figure 43: Most Common Question Keywords Graph

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AGENTS

The Agents page is where an admin or a manager can view all of the agents in that Queue and view records such as agent's skills, personal chat statistics, and chat transcripts. There is a **Force Agent Presence Refresh** button that allows agents to manually refresh their Teams status on Chime.

SESSION HISTORY

The History page is where a user can view a list of chats within a certain time frame. These chats can be sorted by guest email, session ID, and start and stop date.

SUGGESTIONS AND REPLIES

In this section Managers can add suggestions on skill tags for each Queue. This is helpful to guest by having prewritten common questions and answers without starting a chat. With the **Add Suggestion** button Managers can create suggestions for guests to use.

ADDING A SUGGESTION

Once the **Adding Suggestion button** is clicked a modal appears. Each field in the modal must be filled in to create a suggestion that will appear under the skill tag.

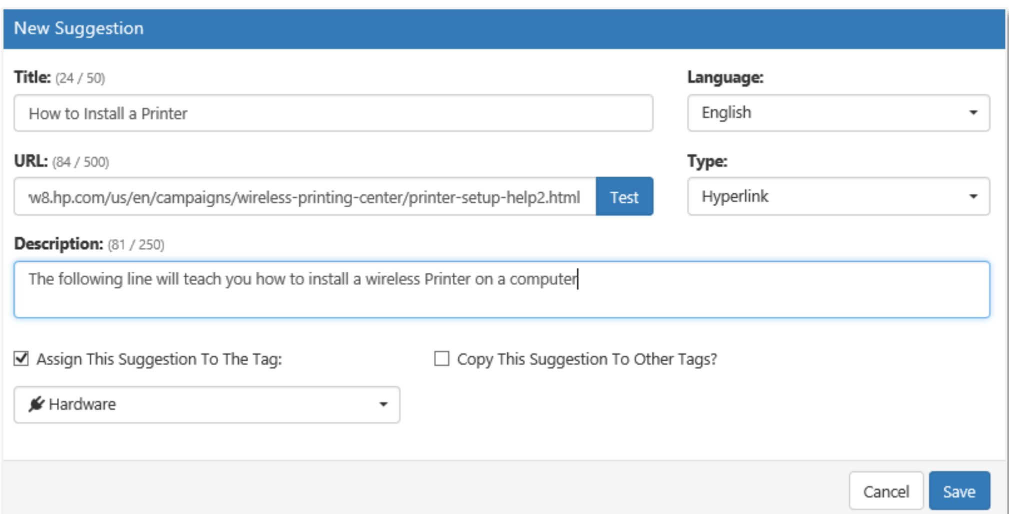

Figure 44: Adding a New Suggestion

- Title- Enter in the appropriate name for the suggestion tag.
- URL- Copy/Paste a URL that is associated with the suggestion.
- Description- Add a description so guests know what the link will do.
- Language- Select the language desired.
- Hyperlink- This is associated with the URL, it can either be a Hyperlink or Video.

The **Copy This Suggestion To Other Tags** box allows the created suggestion tag to be used on other skill tags.

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IMPLEMENTATION OF SUGGESTIONS ON HOME PAGE

To Add a Skill tag for Guests to use follow the steps below.

1. My Manager Home →Manager Queues →Queue Settings →Routing →Assigned Tags → Add Tags

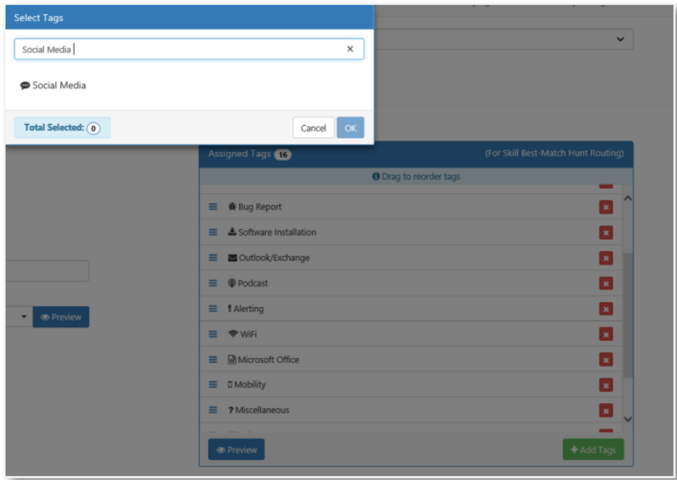

Figure 45: Adding a Skill Tag on Routing

2. My Manager Home →Manager Queues →Queue Dashboard →Suggestions & Replies →Suggestions
   - Order Suggestions on Home Page By
     - Choosing **Order** allows the Manager to decide the order of the suggestion tags, after clicking ⇕ Change Order the order will change.
     - Choosing **Up Votes** makes the order of the suggestion tag based on what the guests find most helpful based on up votes/ down votes.
   - Show General Info Suggestions
     - Show
     - Hide
   - Suggestion Display Type
     - Gives three options and a preview on how the suggestion tags will look on the Home Page.

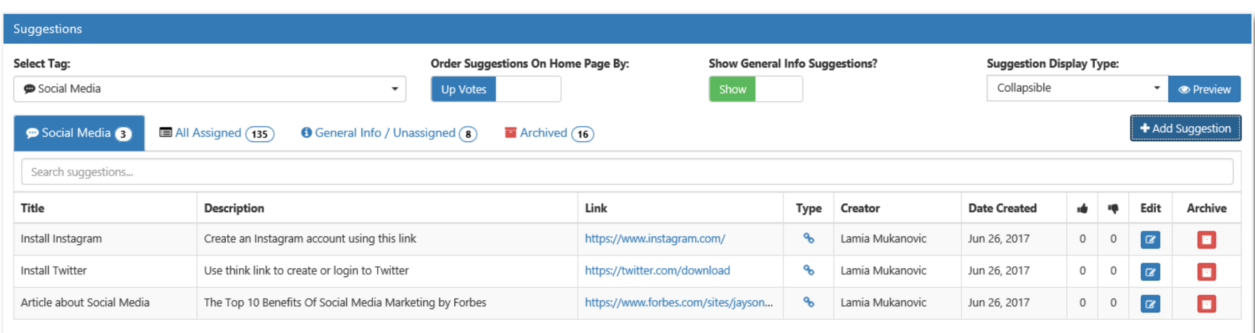

Figure 46: Suggestions on Queue Dashboard

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3. Home →Queue →Skill Tag

At the end, this is how the skill tag will appear on the Home Page

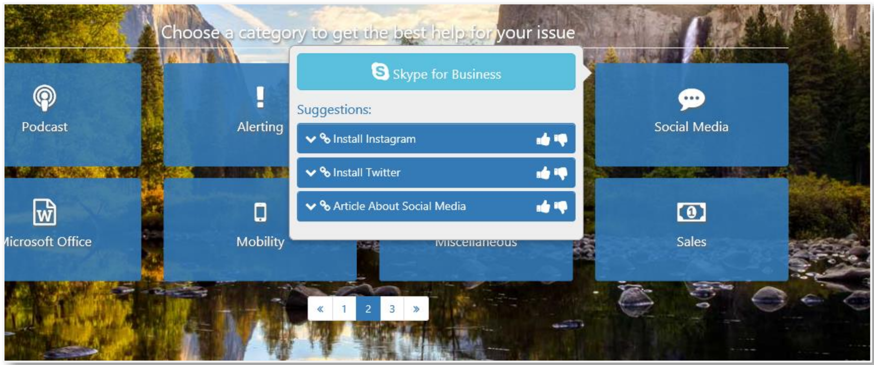

Figure 47: Home Page with Skill Tag

STANDARD REPLIES

Managers can create standard replies for Agents to use during chats. To create a standard reply go to My Manager Home → Manage Queues →Queue Dashboard →Suggestions & Replies → Standard Replies

CREATING A STANDARD REPLY

To create a new standard reply, click **+ New Standard Reply** then fill in all of the requirements and click **Preview Text** when finished. **Note: a new line will not be created unless \n is at the end of the line.** This standard reply can be used inside a chat located on the Replies tab while an Agent is talking with a Guest.

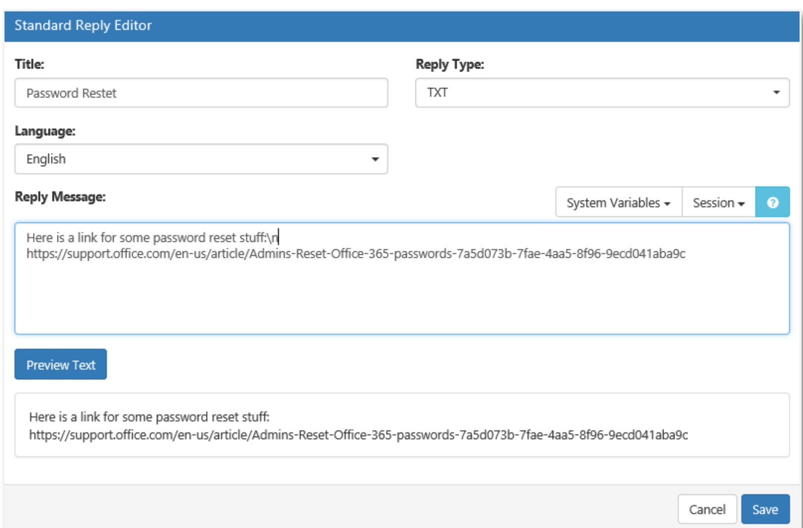

Figure 48: Creating Standard Reply

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ALERTS

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 Teams message from the dispatcher. Enhanced Alerts however, will open up using the Chime Alerting App and will be thoroughly customizable. 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.

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.

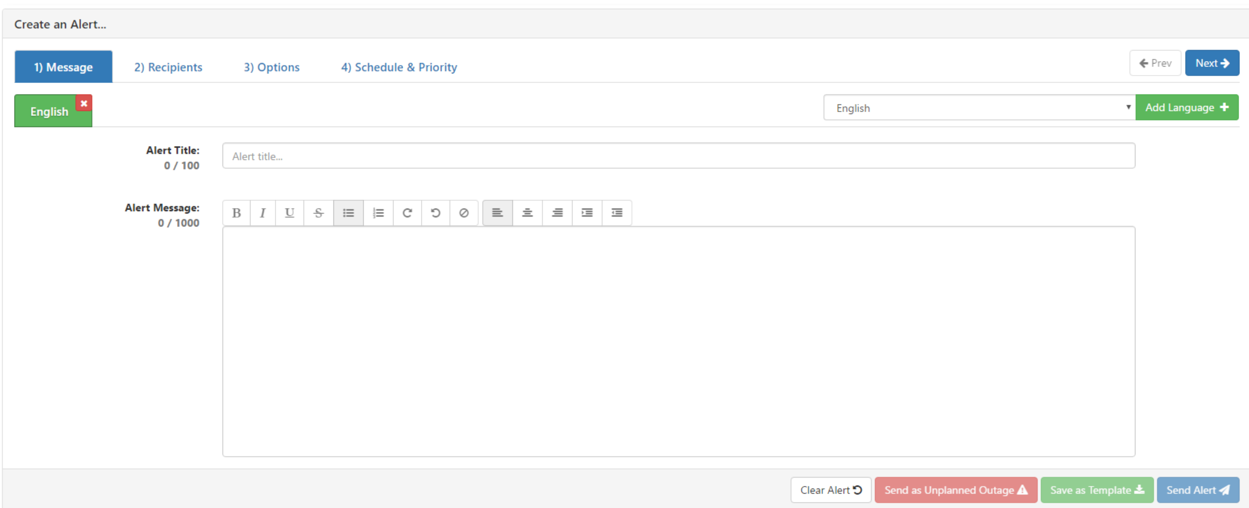

Figure 49: Alert Message

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.

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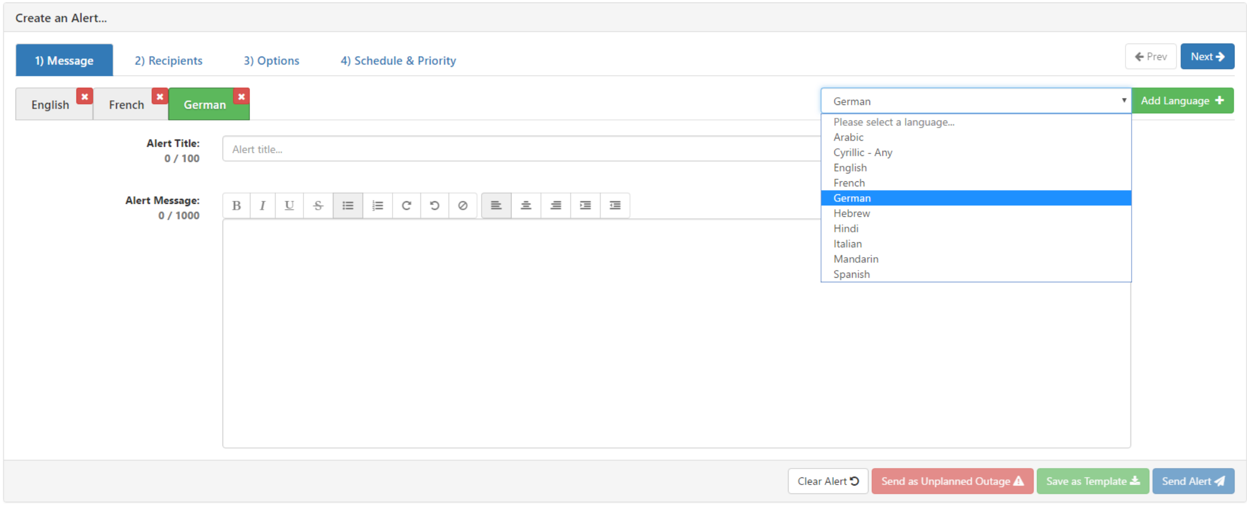

Figure 50: Adding Additional Languages

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.
4. 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.
   - Upload Recipients: The last way to add recipients is by uploading a text file with one SIP URI recipient per line. Click **Pick File…** and select the file containing the recipients to add them to the alert.

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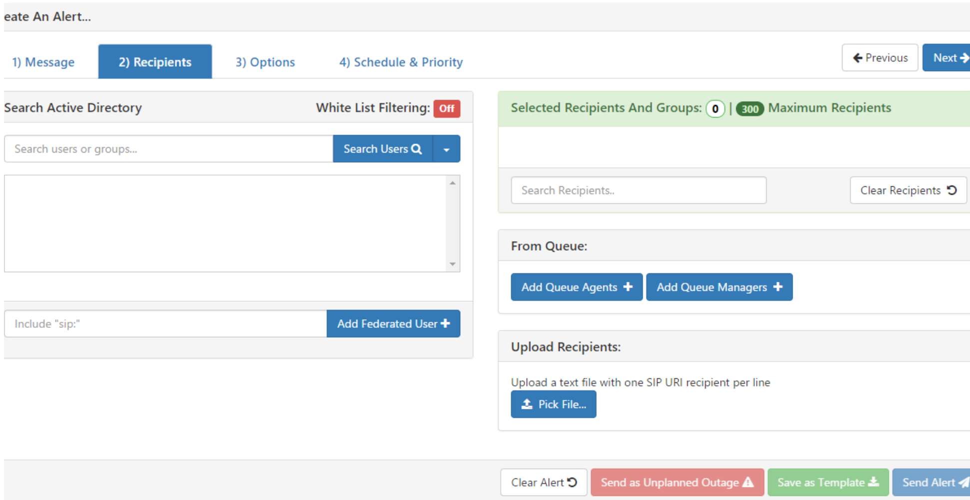

Figure 51: Alert Recipients

5. 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.

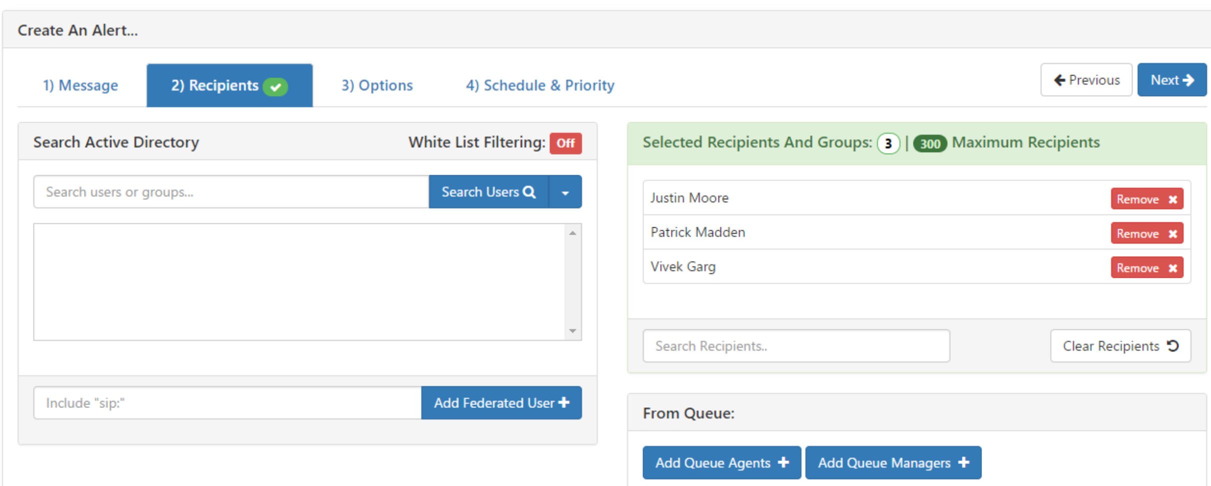

Figure 52: Added Recipients

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 Teams 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 Alerting App installed and running.

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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.

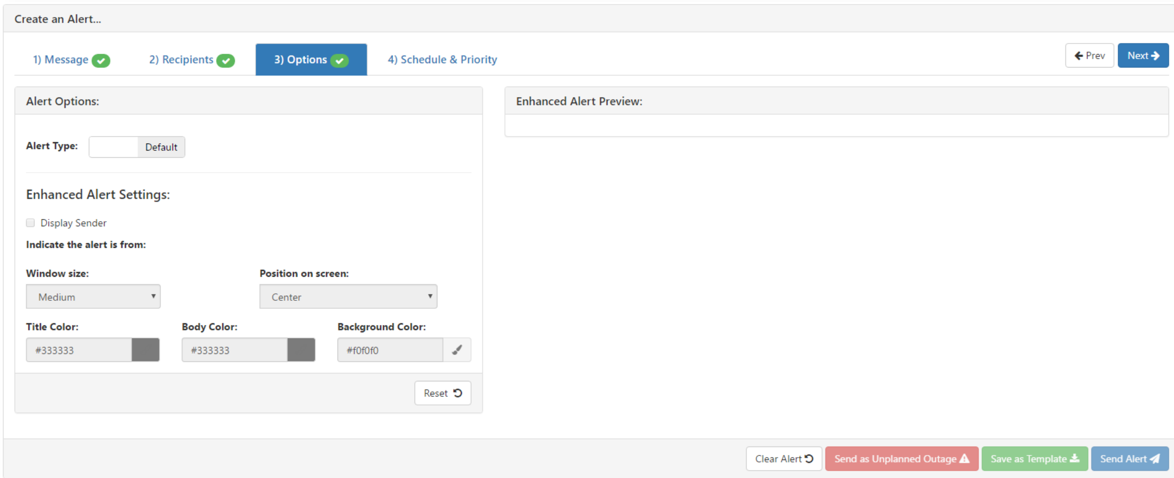

Figure 53: Alert Options

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.

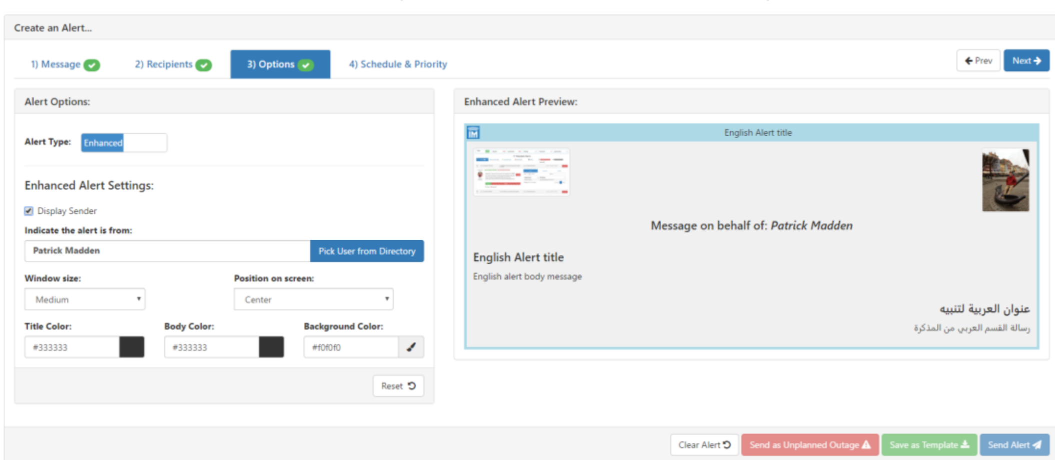

Figure 54: Enhanced Alert Features

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

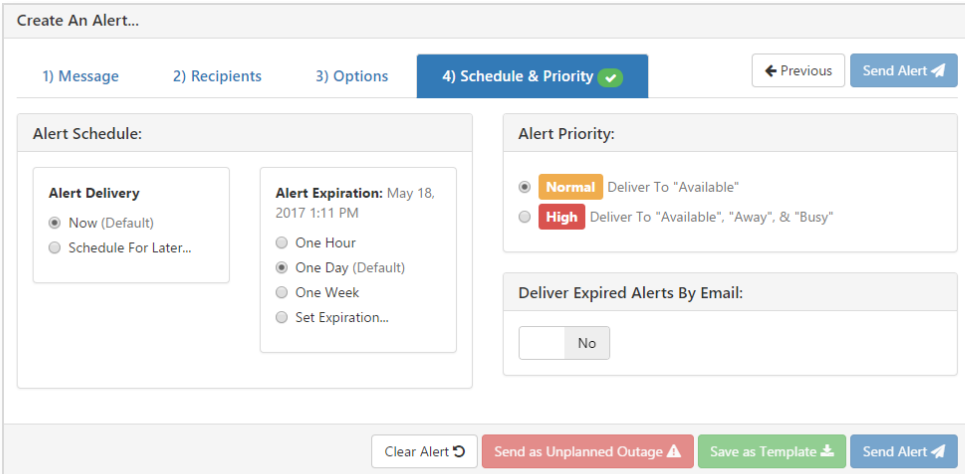

Figure 55: Alerts Schedule & Priority

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. Enabling **Deliver Expired Alerts By Email** will email the alert to all intended recipients if the alert expires.

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.

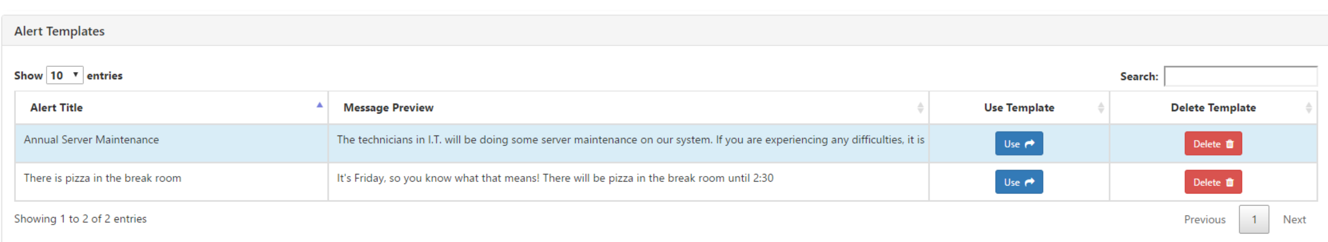

Figure 56: Alert Templates

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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.

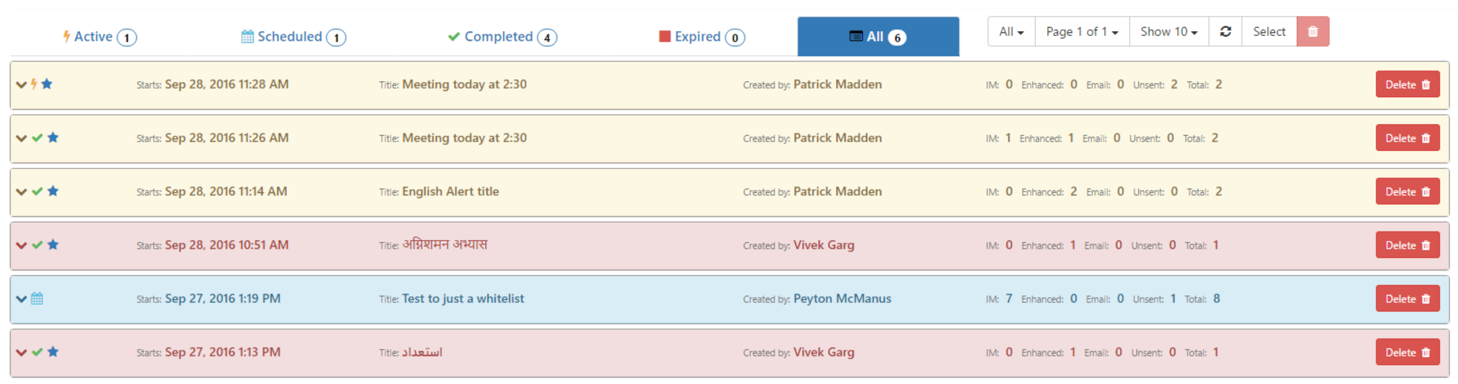

Figure 57: Alert History

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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.

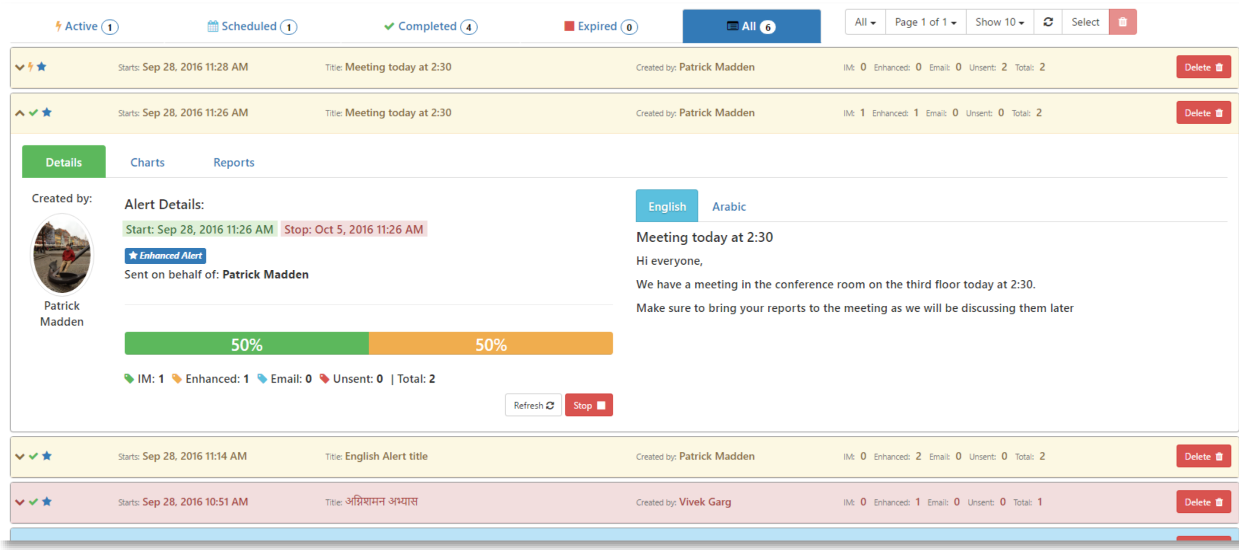

Figure 58: Alert Details

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.

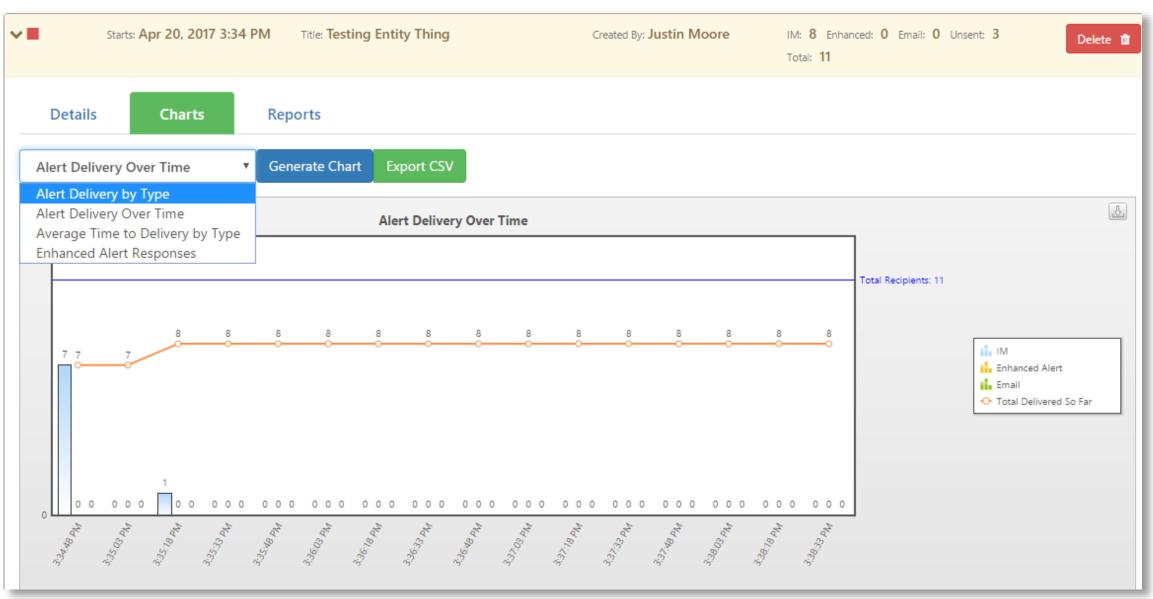

Figure 59: Alert Charts

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The Reports tab shows the recipients of the alert and how they have received the alert. The five sections in reports are Total, IM, Enhanced, Email and Unsent. 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.

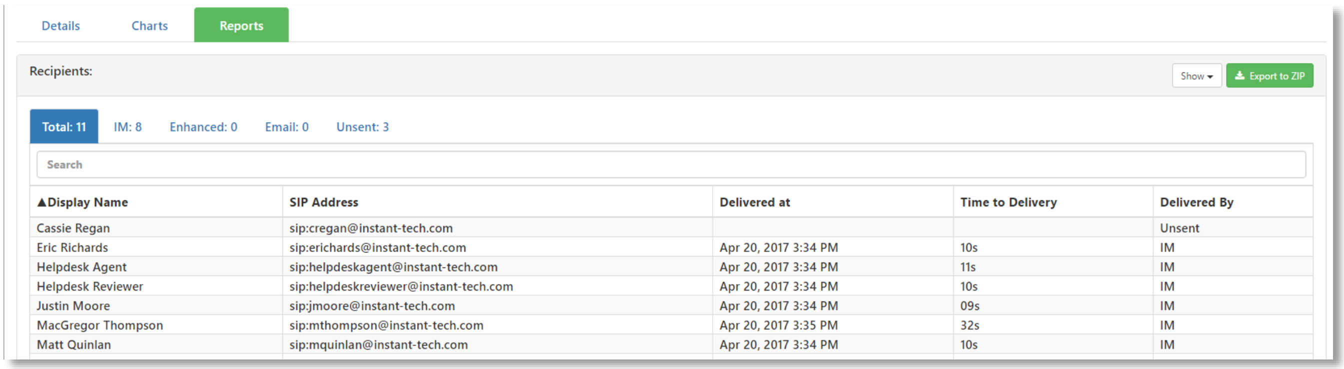

Figure 60: Alert Reports

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 Manager in the Queue.

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OUTAGES

The Outages page is where you can go to notify the guests of a Queue that there is a problem.

To create an outage, click **Create Outage**.

1. The first section, Outage Details, is where you fill in the outages title and details.
2. The second section, Outage Options, is where outages can be set as unplanned or planned, meaning it has a schedule.

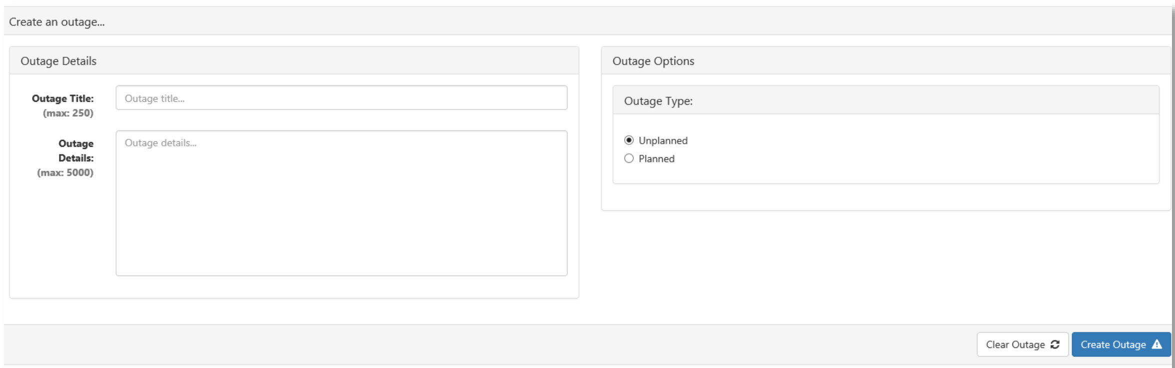

Figure 61: Outage Title & Details

To see the details of all created outages, click **Outage History**.

This page allows you to filter through different kinds of outages and see the information for them.

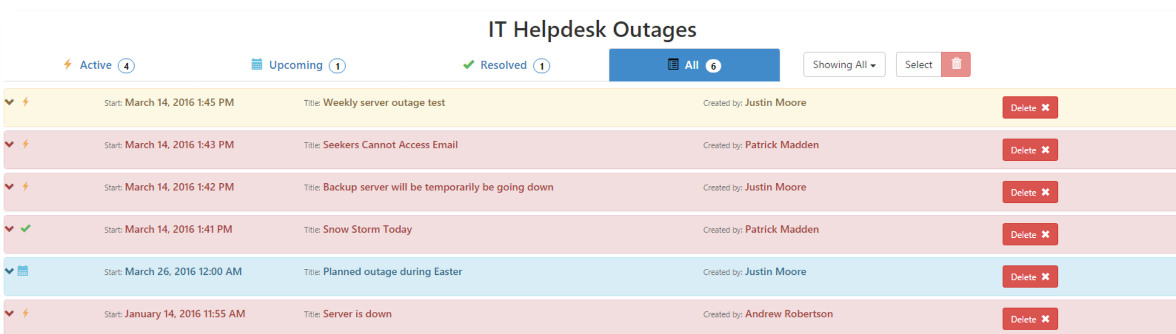

Figure 62: Outage History

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This is an example of an expanded outage in the outage history.

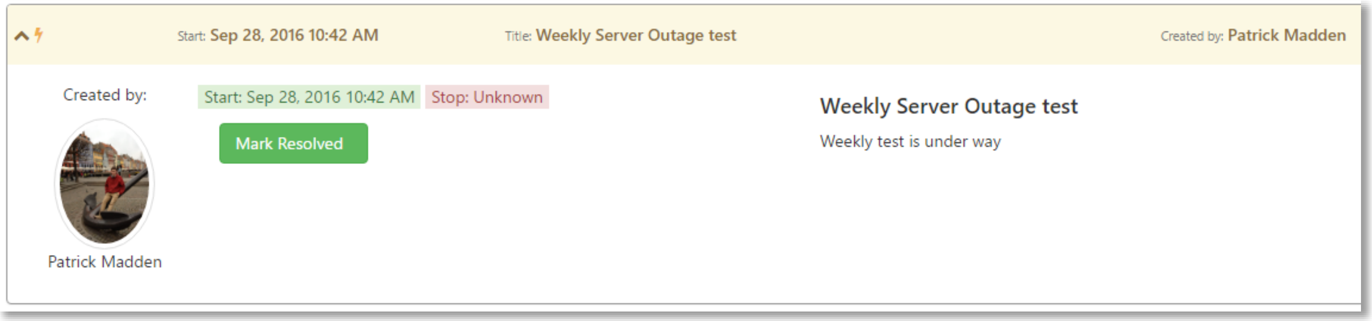

Figure 63: Expanded Outage

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