



California Statewide Automated Welfare System

## **Design Document**

CA-226672: DDID 2222, 2284, 2291, 2687, 2688,  
2689, 2690, 2691, 2692, 2693, 2694, 2695, 2696

Administration Page for Contact Center

| CalSAWS | DOCUMENT APPROVAL HISTORY |             |
|---------|---------------------------|-------------|
|         | Prepared By               | Kevin Hooke |
|         | Reviewed By               |             |

| DATE      | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR      |
|-----------|---------------------|----------------------|-------------|
| 3/15/2021 | V0.1                | Draft                | Kevin Hooke |
|           |                     |                      |             |
|           |                     |                      |             |
|           |                     |                      |             |
|           |                     |                      |             |
|           |                     |                      |             |
|           |                     |                      |             |
|           |                     |                      |             |
|           |                     |                      |             |

## Table of Contents

|         |   |                                     |
|---------|---|-------------------------------------|
| 1       | Overview .....  | 7                                   |
| 1.1     | Current Design .....  | 7                                   |
| 1.2     | Requests .....  | 7                                   |
| 1.3     | Overview of Recommendations.....                            | 7                                   |
| 1.4     | Assumptions .....   | 8                                   |
| 2       | Recommendations .....                                       | 9                                   |
| 2.1     | Admin Page .....  | <b>Error! Bookmark not defined.</b> |
| 2.1.1   | Overview.....   | 9                                   |
| 2.1.2   | Description of Changes .....                                | 9                                   |
| 2.1.2.1 | Admin Page Mockup.....                                      | <b>Error! Bookmark not defined.</b> |
| 2.1.2.2 | Admin Page Security .....                                   | 10                                  |
| 2.1.2.4 | Admin Page Security – access without role .....             | 11                                  |
| 2.1.3   | Assumptions.....  | 11                                  |
| 2.2     | Admin Page Configuration Change ‘Cool-down’ .....           | 11                                  |
| 2.2.1   | Overview.....   | 11                                  |
| 2.2.2   | Description of Changes .....                                | 11                                  |
| 2.2.3   | Configuration Change (‘Cool-down’) Dialog Mockup.....       | 12                                  |
| 2.3     | Emergency Open/Close.....                                   | 12                                  |
| 2.3.1   | Overview.....   | 12                                  |
| 2.3.2   | Description of Changes .....                                | 12                                  |
| 2.3.2.1 | Emergency Open/Close page mockup: Contact Center is open    | 12                                  |
| 2.3.2.3 | Emergency Open/Close – Contact Center closed warning mockup | 15                                  |
| 2.3.2.4 | Emergency Open/Close – Contact Center closed warning.....   | 15                                  |
| 2.3.2.5 | Emergency Open/Close – Contact Center is ‘open’ .....       | 15                                  |
| 2.3.2.6 | Emergency Open/Close – Contact Center is ‘closed’ .....     | 16                                  |
| 2.3.2.7 | Perform Emergency Open/Close - Re-Open via Phone .....      | 17                                  |
| 2.3.2.8 | Perform Emergency Open/Close Procedure .....                | 17                                  |
| 2.3.2.9 | Perform Re-Open Procedure .....                             | 17                                  |
| 2.3.3   | Assumptions.....  | 18                                  |

|   |    |
|---|----|
| 2.4 Queue Hold Messages.....                                    | 18 |
| 2.4.1 Overview.....   | 18 |
| 2.4.2 Description of Changes .....                              | 18 |
| 2.4.2.1 Queue Hold Messages: No messages defined page mockup .  | 18 |
| 2.4.2.2 No messages defined .....                               | 19 |
| 2.4.2.3 Queue Hold Messages: Messages defined page mockup ..... | 19 |
| 2.4.2.4 Queue Hold Messages: Add new message page mockup .....  | 20 |
| 2.4.2.5 Add new message .....                                   | 21 |
| 2.4.2.6 Queue Hold Messages: View/Edit message page mockup..... | 22 |
| 2.4.2.7 View/Edit message.....                                  | 22 |
| 2.4.2.8 Queue Hold Messages: Delete message page mockup .....   | 24 |
| 2.4.2.9 Delete message .....                                    | 24 |
| 2.4.3 Assumptions.....  | 24 |
| 2.5 Courtesy Callback.....                                      | 25 |
| 2.5.1 Overview.....   | 25 |
| 2.5.2 Description of Changes .....                              | 25 |
| 2.5.2.1 Courtesy Callback Disabled: Page mockup.....            | 25 |
| 2.5.2.2 Courtesy Callback Disabled .....                        | 26 |
| 2.5.2.3 Courtesy Callback Enabled: Page mockups .....           | 26 |
| 2.5.2.4 Courtesy Callback Enabled .....                         | 27 |
| 2.5.3 Assumptions.....  | 28 |
| 2.6 Scheduled Callback .....                                    | 29 |
| 2.6.1 Overview.....   | 29 |
| 2.6.2 Description of Changes .....                              | 29 |
| 2.6.2.1 Scheduled Callback – feature disabled page mockup.....  | 29 |
| 2.6.2.2 Scheduled Callback – feature disabled.....              | 29 |
| 2.6.2.3 Scheduled Callback – feature enabled page mockup.....   | 30 |
| 2.6.2.4 Scheduled Callback – feature enabled.....               | 30 |
| 2.6.3 Assumptions.....  | 38 |
| 2.7 Queue Limits.....   | 39 |
| 2.7.1 Overview.....   | 39 |
| 2.7.2 Description of Changes .....                              | 40 |
| 2.7.2.1 Queue Limits: Page mockup.....                          | 40 |



|   |    |
|---|----|
| 2.7.2.2 Queue Limits .....                                  | 40 |
| 2.8 After Call Work Limit .....                             | 41 |
| 2.8.1 Overview.....   | 41 |
| 2.8.2 Description of Changes .....                          | 42 |
| 2.8.2.1 After Call Work Limit – page mockups .....          | 42 |
| 2.8.2.2 After Call Work Limit .....                         | 43 |
| 2.9 Roll-on/Roll-off / Update Agent .....                   | 43 |
| 2.9.1 Overview.....   | 43 |
| 2.9.2 Description of Changes .....                          | 43 |
| 2.9.2.1 Roll-on/Roll-off page mockup.....                   | 44 |
| 2.9.2.2 Roll-on/Roll-off.....                               | 44 |
| 2.9.2.3 Roll-on/Roll-off – Agent selected page mockup ..... | 45 |
| 2.9.2.4 Roll-on/Roll-off – Agent selected .....             | 45 |
| 2.9.2.5 Roll-on/Roll-off – View/Edit Agent page mockup..... | 46 |
| 2.9.2.6 Roll-on/Roll-off – View/Edit Agent.....             | 46 |
| 2.9.2.7 Roll-on/Roll-off – Add Agent page mockup.....       | 47 |
| 2.9.2.8 Roll-on/Roll-off – Add Agent.....                   | 47 |
| 2.10 Emergency Message .....                                | 50 |
| 2.10.1 Overview.....  | 50 |
| 2.10.2 Description of Changes .....                         | 51 |
| 2.10.3 Assumptions.....                                     | 60 |
| 2.11 Informational Message .....                            | 61 |
| 2.11.1 Overview.....  | 61 |
| 2.11.2 Description of Changes .....                         | 62 |
| 2.12 Supervisor Email Notification .....                    | 72 |
| 2.12.1 Overview.....  | 72 |
| 2.12.2 Description of Changes .....                         | 73 |
| 2.13 Create/Delete/Edit Team .....                          | 78 |
| 2.13.1 Overview.....  | 78 |
| 2.13.2 Description of Changes .....                         | 79 |
| 2.14 Quick Connects .....                                   | 83 |
| 2.14.1 Overview.....  | 83 |
| 2.14.2 Description of Changes .....                         | 84 |

|        |  |     |
|--------|--|-----|
| 2.14.3 | Assumptions.....                                 | 92  |
| 2.15   | Display Office Hours.....                        | 92  |
| 2.15.1 | Overview.....                                    | 92  |
| 2.15.2 | Description of Changes .....                     | 92  |
| 2.15.3 | Assumptions.....                                 | 96  |
| 2.16   | Configuration Change Audit .....                 | 96  |
| 2.16.1 | Overview.....                                    | 96  |
| 2.16.2 | Description of Changes .....                     | 97  |
| 3      | Supporting Documents.....                        | 99  |
| 4      | Requirements.....                                | 100 |
| 4.1    | Project Requirements .....                       | 100 |
| 5      | Appendix .....                                   | 106 |
| 5.1    | Emergency Open/Close Status – Data Model.....    | 106 |
| 5.2    | Queue Hold Message Data Model .....              | 106 |
| 5.3    | Courtesy Callback Data Model.....                | 106 |
| 5.4    | Courtesy Callback Configuration Data Model ..... | 106 |

# 1 OVERVIEW

---

This design document is for SCR CA-226672 and outlines the addition of a new page to the Contact Center Enhanced Contact Control Panel (ECCP) application (SCR CA-226844). This new page allows Contact Center administrators to configure Contact Center features for their County.

## 1.1 Current Design

This functionality does not currently exist - currently Administrators make support requests to the CalSAWS Contact Center Operations Team to make these changes on their behalf. The Operations Team makes these configuration changes by interacting with Amazon Web Services (AWS) Connect directly.

## 1.2 Requests

Develop a new Administration page that allows Contact Center administrators to configure the following features for their County:

- Emergency Open/Close
- Queue Hold Messages
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Roll-on/off or Update Agent
- Emergency Message
- Informational Message
- Supervisor Email Notifications
- Create/Delete/Edit Team
- Quick Connects
- Display Hours of Operation

## 1.3 Overview of Recommendations

Add a new Administration page to the Enhanced CCP application to allow Contact Center Administrators to configure Contact Center features for their County.

1. Add a new Administration page to the Enhanced CCP application that allows configuration of the following.
  - a) Emergency Open/Close
  - b) Emergency Messages
  - c) Queue Hold Messages
  - d) Courtesy Callback

- e) Scheduled Callback options
  - f) Queue Limits
  - g) After Call Work limits
  - h) Roll-on/Roll-off and update Agent details
  - i) Informational Messages
  - j) Supervisor Email Notifications
  - k) Create/delete Team(s)
  - l) Quick Connects
  - m) Display Hours of Operation
2. Integrate access to the Administration page with CalSAWS role-based security and Single Sign On (SSO). Access is restricted to only users who have the 'Contact Center Admin Page' role.
  3. Implement a 'cool down' period that requires a 1 minute delay between changes to the same configuration option.

#### 1.4 Assumptions

1. All features on the Administration page are customizable by County. An Admin user with the required role to access the Admin Page can view and change the configuration options only for their County.
2. Access to the new Administration page will be via Single Sign On (SSO) using existing CalSAWS security functionality.
3. The following Administration page functions will be disabled for Regional Call Center only counties:
  - a) Emergency Open/Close
  - b) Emergency Messages
  - c) Queue Hold Messages
  - d) Courtesy Callback
  - e) Scheduled Callback options
  - f) Queue Limits
  - g) Informational Messages
  - h) Supervisor Email Notifications

## 2 RECOMMENDATIONS

---

This section outlines recommendations to add a new Administration page to the Enhanced CCP application.

### 2.1 Administration Page

#### 2.1.1 Overview

Add a new Administration page to the Enhanced CCP application. This page allows the user to customize features of the Contact Center for their County.

#### 2.1.2 Description of Changes

1. Add a new icon/menu item to the Enhanced CCP application, that when clicked, displays the new Administration page.
2. Add a new page to the new Enhanced CCP application that displays available configuration options as a navigation menu.
3. Clicking on items in this menu displays a panel with the configurable options for that selected item. Each of these options is described in the below sections.

### 2.1.2.1 Administration page Mockup

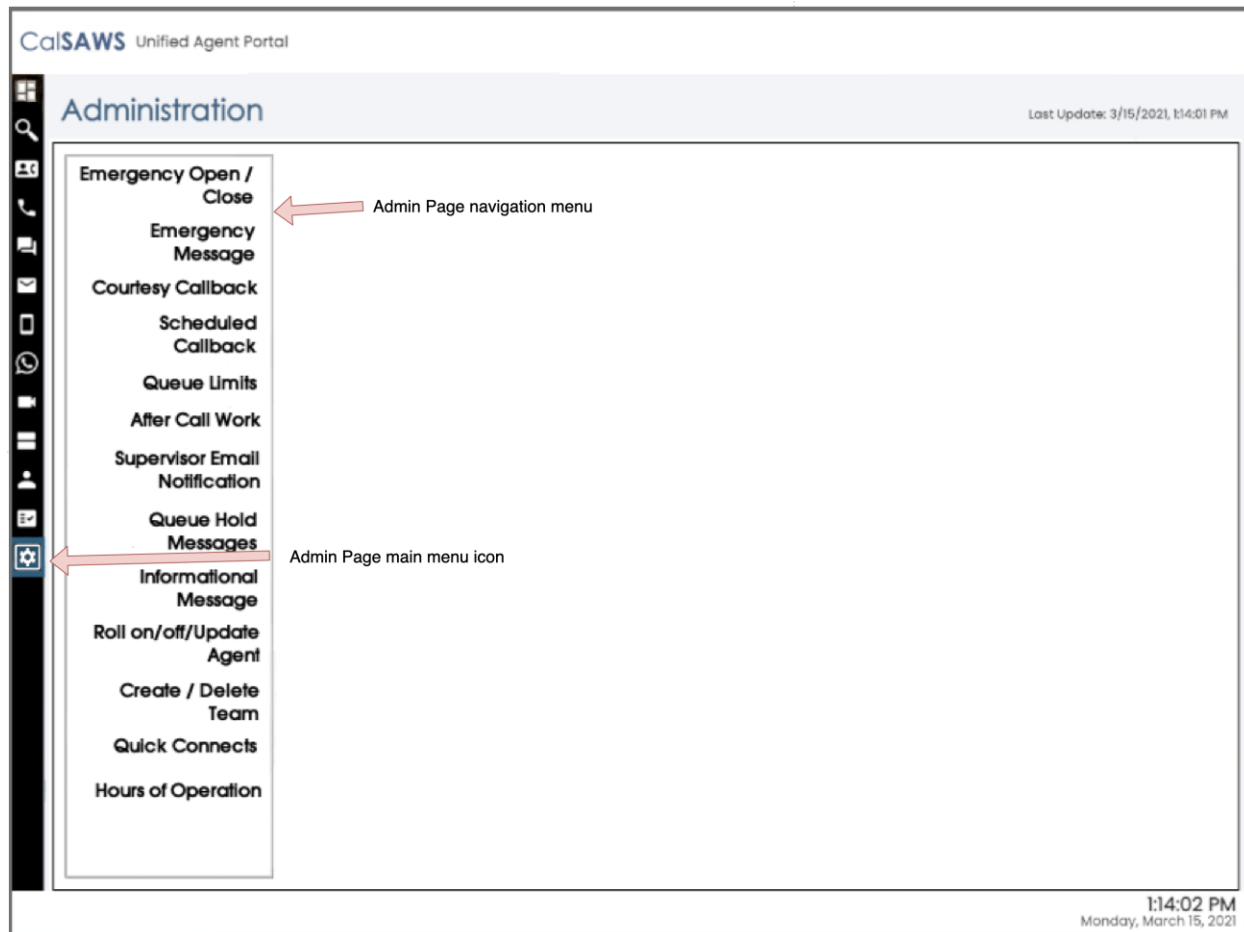


Figure 1 Administration page menu options

### 2.1.2.2 Administration Page Security

The Administration page is a new page added to the Enhanced CCP application. Access to the Enhanced CCP is controlled using the CalSAWS Identify Provider.

Create a new CalSAWS role 'Contact Center Admin Page' in the CalSAWS system.

Access to the Administration page is restricted to CalSAWS users who have this new CalSAWS role assigned for their County.

There is only one level of security for the Administration page:

- If a user has the 'Contact Center Admin Page' role they are able to access the Administration page. A user that has access to the Administration page is allowed to perform all Admin actions on the page.

- If a user does not have the 'Contact Center Admin Page' role the menu icon for the Administration page does not display and the user is unable to access the page.

### **2.1.2.3 Administration Page API Security**

User actions on the Administration page result in API (Application Programming Interface) calls to background services within the Contact Center AWS account. These services are accessed using API Gateway. Access to these calls is protected by confirming that the user of the Administration page:

- a) Is currently authenticated with their CalSAWS credentials
- b) Is assigned the 'Contact Center Administration page' role

### **2.1.2.4 Administration page Security – access without role**

If a user does not have the required 'Contact Center Administration page' role, the Administration page icon is not displayed in the navigation menu.

### **2.1.3 Assumptions**

1. User must be a CalSAWS user and must be signed on via the CalSAWS Identity Provider (Single Sign-on) to access the Enhanced CCP.
2. The user must have the 'Contact Center Admin Page' role to access the Administration page.

## **2.2 Administration Page Configuration Change 'Cool-down'**

### **2.2.1 Overview**

When the user changes any of the configurable options from the Administration page, there is a 1 minute 'cool-down' period before they can make an additional change. This is to prevent the user from making changes within a short period of time.

### **2.2.2 Description of Changes**

If the user attempts to change a configurable option less than 1 minute since the last change, a dialog is displayed, as shown in the following dialog mockup section (see section 2.2.3 figure 3).

The user is prevented from making the attempted change until 1 minute has elapsed since the last successful change.

### 2.2.3 Configuration Change ('Cool-down') Dialog Mockup

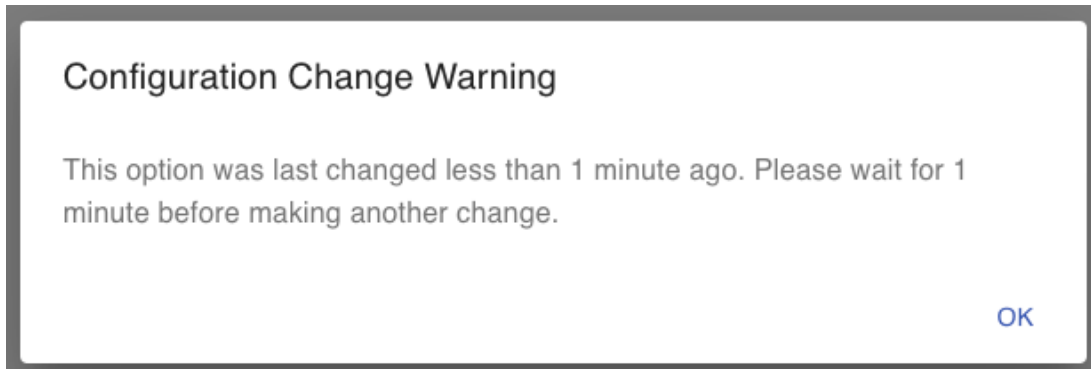


Figure 2 Configuration Change Warning Page Mockup

## 2.3 Emergency Open/Close

### 2.3.1 Overview

The Emergency Open/Close feature allows a user of the Administration page to temporarily close the Contact Center for their County in case of an emergency. While closed, all incoming calls to the Contact Center will play the currently selected Emergency Message to the caller (see section 2.9).

The Emergency Message only plays while the Contact Center is closed using this Emergency Open/Close feature. When the Contact Center is re-opened, the automatic message playback will discontinue.

The Emergency Open/Close does not change which Emergency Message is currently selected. The selected Emergency Message can only be changed by an Admin user (using the Emergency Message feature described in section 2.9).

### 2.3.2 Description of Changes

#### 2.3.2.1 Emergency Open/Close page mockup: Contact Center is open

This page displays when the Contact Center for the user's County is currently open and they click the 'Emergency Open/Close' menu option.



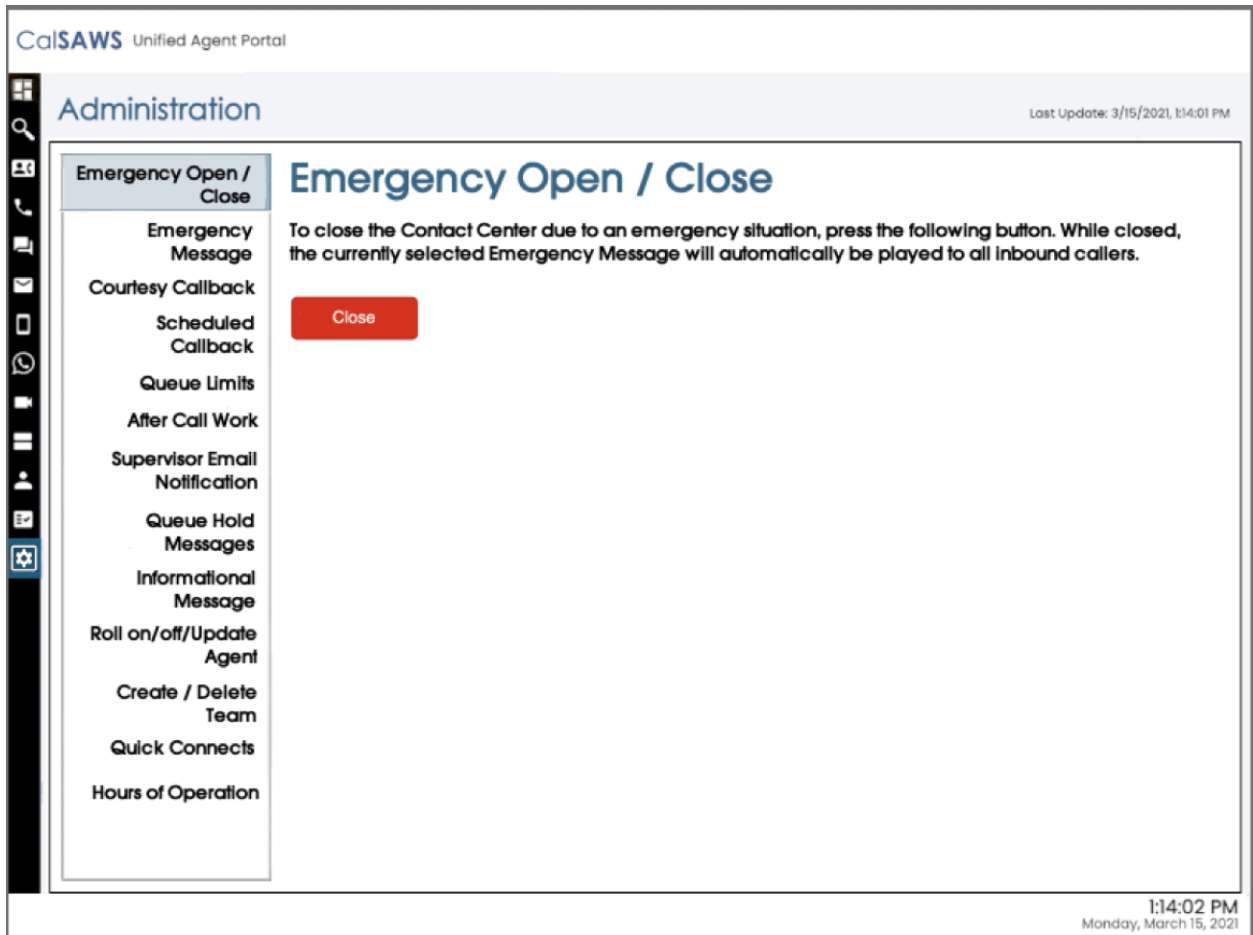


Figure 3 Emergency Closure - Perform Closure Option

### 2.3.2.2 Emergency Open/Close page mockup: Contact Center is closed

This page displays when the Contact Center for the user's County is currently closed and they click the 'Emergency Open/Close' menu option.

CalSAWS Unified Agent Portal

Administration

Last Update: 3/15/2021, 1:14:01 PM

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor Email Notification

Queue Hold Messages

Informational Message

Roll on/off/Update Agent

Create / Delete Team

Quick Connects

Hours of Operation

Emergency Open / Close

The Contact Center is currently closed due to an emergency. While closed, the currently selected Emergency Message is played to all callers. When the Contact Center is re-opened, the Emergency Message playback will end.

To re-open, press the following button:

Re-open

1:14:02 PM

Monday, March 15, 2021

Figure 4 Emergency Closure - Re-open Option

### 2.3.2.3 Emergency Open/Close – Contact Center closed warning mockup

The screenshot shows the 'Contact Center Admin' interface. On the left is a sidebar menu with items: Emergency Open / Close, Emergency Message, Courtesy Callback, Scheduled Callback, Queue Limits, After Call Work, Supervisor email notification, Queue Hold Messages (highlighted), Informational Message, Roll on/off / Update Agent, Create/Delete Team, Quick Connects, and Hours of Operation. The main content area is titled 'Queue Hold Messages' and includes a description: 'This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:'. Below this is a 'View/edit message' button and a list of messages with radio buttons: Farmer's Market - , EBT - message 1, VITA, BenefitsCal, Farmer's Market - , EBT - message 2, County Office bus, Holiday message 2021, Benefits updates April 2021, and County local news May 2021. An 'Emergency Closure' dialog box is overlaid on the right. The dialog has the title 'Emergency Closure' and contains the text: 'The Contact Center is currently closed due to an emergency. All Admin Page features are currently disabled until the Contact Center is re-opened. To re-open, use the Emergency Open/Close page.' At the bottom of the dialog is a blue 'OK' button.

Figure 5 Emergency Closure warning dialog

### 2.3.2.4 Emergency Open/Close – Contact Center closed warning

If the Contact Center is currently closed due to an emergency and the user clicks on any of the Administration page menu items other than 'Emergency Open/Close', a dialog in Figure 6 is shown to the user. The dialog shows the following message:

*"The Contact Center is currently closed due to an emergency. All Administration page features are currently disabled until the Contact Center is re-opened. To re-open, use the Emergency Open/Close page".*

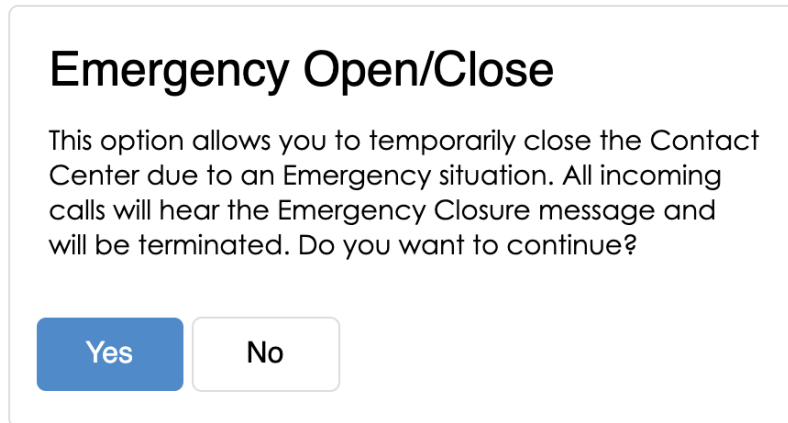
If the user presses the "OK" button, the dialog is closed. Features on the current page are available in read-only mode. Any features that perform a create, edit or delete action are disabled until the Contact Center is re-opened.

### 2.3.2.5 Emergency Open/Close – Contact Center is 'open'

This flow describes the Emergency Open/Close page if the Contact Center is currently in the 'open' state:

1. User selects 'Emergency Open/Close' option from the Administration page

2. System checks the date/time of last Emergency Open/Close. If last change was less than 1 minute ago, then continue, otherwise the “cool-down” dialog is displayed as described in Section 2.2.
3. If last change was more than 1 minute ago, user is prompted with a confirmation message to continue:



**Emergency Open/Close**

This option allows you to temporarily close the Contact Center due to an Emergency situation. All incoming calls will hear the Emergency Closure message and will be terminated. Do you want to continue?

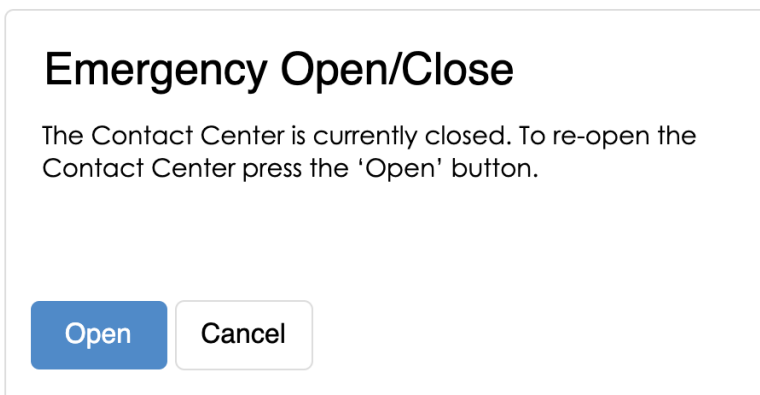
Figure 6 Emergency Closure Confirmation dialog

4. If user selects “No”, the user is returned to the Administration page menu and no further action is taken.
5. If the user selects “Yes”, the steps in the following section “Perform Emergency Open/Close Procedure” are executed.

#### 2.3.2.6 Emergency Open/Close – Contact Center is ‘closed’

This describes the Emergency Open/Close page, if the Contact Center is currently in a ‘closed’ state:

1. User selects ‘Emergency Open/Close option from Administration page
2. Administration page displays Emergency Open/Close re-open dialog:



**Emergency Open/Close**

The Contact Center is currently closed. To re-open the Contact Center press the ‘Open’ button.

Figure 7 Emergency Open/Close - Re-open dialog

3. The 'Open' button is displayed on the page.
4. If the user presses "Cancel", no action is taken.
5. If the user presses "Open", the steps in the following section "Perform Emergency Open / Close – Re-open" are executed.

#### **2.3.2.7 Perform Emergency Open/Close - Re-Open via Phone**

Update the existing Remote Admin by phone support to allow an authenticated user to perform the Emergency Open and Close process via phone.

This feature complements the performing of the Emergency Open and Close via the Administration page.

- If the closure is performed via the Administration page, the Contact Center can be re-opened using the Administration page or remotely by phone.
- If the closure is performed remotely by phone, the Contact Center can be re-opened remotely by phone or the Administration page.

#### **2.3.2.8 Perform Emergency Open/Close Procedure**

When a user selects the 'Emergency Open/Close option, the system performs the following steps:

1. Calls that are currently in progress with an Agent or are in a queue, continue until they are handled and/or completed.
2. Scheduled Callbacks during the period, when the Emergency Closure is in place will continue, but the callback message will play the Emergency Message and ask the customer to callback at another time.
3. Contact Center Emergency Open/Close status is updated to 'closed'.
4. The Call Flow for incoming calls checks the Emergency Closure status. If the current status is 'closed', the Emergency Message is played to the caller and the call is ended.

#### **2.3.2.9 Perform Re-Open Procedure**

1. When a user selects the 'Re-open' option, the system performs the following steps: Contact Center Emergency Open / Close status is updated to 'open' to indicate Contact Center is now open.
2. The Call Flow for incoming calls checks the Emergency Open/Close status. If the current status is 'open', the call flow will continue as normal.

### 2.3.3 Assumptions

1. All Administration page options will be disabled when Contact Center is closed under an Emergency Closure, apart from the Emergency Closure page and the button to re-open the Contact Center.
2. There is no additional reporting or monitoring to show caller activity during the Emergency Closure (e.g. incoming calls missed while the Contact Center is closed). This information can be retrieved if needed using reports in eGain.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.4 Queue Hold Messages

### 2.4.1 Overview

The Queue Hold Messages feature on the Administration page allows the Admin user to add, edit and delete up to 10 custom Queue Hold messages for their County. The content of the message is text, which is used to produce a voice message using text to voice.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

These messages are played while a caller is on hold and can be used to remind or inform the caller of upcoming events or other information relevant to the County.

Once a new message is added or an existing message is changed, it is available for playback during the next call waiting in a queue, there is no delay before it can be used.

### 2.4.2 Description of Changes

#### 2.4.2.1 Queue Hold Messages: No messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item, if there are no Queue Hold Messages defined, the following page is displayed:

| Contact Center Admin          |   |
|-------------------------------|---|
| Emergency Open / Close        | <h2>Queue Hold Messages</h2> <p>This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Queue Hold messages are played when a customer is waiting in a queue for an agent. Select a message and press a button to View/Edit or Delete:</p> <p> <input type="button" value="View/edit message"/> <input type="button" value="Delete message"/> <input type="button" value="Add new message"/> </p> <p>There are currently no messages defined. Press 'Add new message' to add a new message,</p> |
| Emergency Message             |   |
| Courtesy Callback             |   |
| Scheduled Callback            |   |
| Queue Limits                  |   |
| After Call Work               |   |
| Supervisor email notification |   |
| Queue Hold Messages           |   |
| Informational Message         |   |
| Roll on/off / Update Agent    |   |
| Create/Delete Team            |   |
| Quick Connects                |   |
| Hours of Operation            |   |
|                               |   |
|                               |   |

Figure 8 Queue Hold Messages - no messages defined

#### 2.4.2.2 No messages defined

When there are no Queue Hold messages defined, the only enabled option is 'Add new message'.

1. If the user presses 'Add new message', the 'Add new message' dialog appears (see section 2.4.2.4 for mockup)

#### 2.4.2.3 Queue Hold Messages: Messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item and there are Queue Hold Messages defined, the following page is displayed:

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Queue Hold Messages

This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Queue Hold messages are played when a customer is waiting in a queue for an agent. Select a message and press a button to View/Edit or Delete:

View/edit message

Delete message

Add new message

- ☐ Farmer's Market - April 2021
- ☐ EBT - message 1
- ☐ VITA
- ☐ BenefitsCal
- ☐ Farmer's Market - May 2021
- ☐ EBT - message 2
- ☐ County Office business hours
- ☐ Holiday message 2021
- ☐ Benefits updates April 2021
- ☐ County local news May 2021

Figure 9 Queue Hold Messages - message display

#### 2.4.2.4 Queue Hold Messages: Add new message page mockup

If the user presses the 'Add new message' button, the following dialog is displayed:

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Queue Hold Messages

This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Queue Hold messages are played when a customer is waiting in a queue for an agent. Select a message and press a button to View/Edit or Delete:

View/edit message

Delete message

Add new message

- ☐ Farmer's Market - April 2021
- ☐ EBT - message 1
- ☐ VITA

### Add new message

English

Message Name:

BenefitsCal

Message text (max 260 words):

This is the example text for message 4 (upto max 260 words)

Message length: 12 of 260 words

Play preview:

0:00 / 0:00

Save

Cancel

Figure 10 Queue Hold Messages - Add New Message dialog

© 2021 CalSAWS. All Rights Reserved.

20



### 2.4.2.5 Queue Hold Messages: Language selection dropdown

**Contact Center Admin**

**Queue Hold Messages**

This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Queue Hold messages are played when a customer is waiting in a queue for an agent. Select a message and press a button to View/Edit or Delete:

[View/edit message](#) [Delete message](#) [Add new message](#)

☐ Farmer's Market - April 2021  
☐ EBT - message 1  
☐ VITA

**Add new message**

Message Name:

Message text (max 260 words):

Message length: 12 of 260 words

Play preview:

English (default) ▼  
Spanish  
Farsi  
Vietnamese  
Mandarin  
Armenian  
Tagalog  
Russian  
Korean  
Cambodian  
Hmong  
Cantonese  
Arabic  
Lao

Figure 11 Queue Hold Messages - Language selection dropdown

### 2.4.2.6 Add new message

1. The 'Add new message' button is only displayed if there are less than 10 defined messages. If the maximum of 10 messages is already defined, the 'Add new message' button is disabled.
2. If the user presses the 'Add new message' button, the 'Add new message' dialog is displayed.
3. User enters a unique message name, up to 60 alphanumeric characters.
4. User enters text for the message, up to a maximum of 260 words. The dialog displays a count of the currently entered number of words that updates as the user types, e.g., "12 of 260 words". The entry field does not accept any additional text entry beyond 260 words.
5. The English version of the message is required.
6. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
  - a. English (default)
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog

- h. Russian
  - i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
  8. If the user presses the 'Save' button, the message is saved, and the page is updated to show the new message in the list.
  9. If the user presses 'Cancel' the dialog is closed and no action is taken.

### 2.4.2.7 Queue Hold Messages: View/Edit message page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Queue Hold Messages

This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Queue Hold messages are played when a customer is waiting in a queue for an agent. Select a message and press a button to View/Edit or Delete:

View/edit message

Delete message

Add new message

☐ Farmer's Market - April 2021
☒ EBT - message 1
☐ VITA
☐ BenefitsCal
☐ Farmer's Market - May 2021
☐ EBT - message 2
☐ County Office business hours
☐ Holiday message 2021
☐ Benefits updates April 2021
☐ County local news May 2021

Edit message

English

Message Name:

EBT - message 1

Message text (max 260 words):

This is the text for example message name 'EBT - message 1'

Message length: 12 of 260 words

Save

Cancel

Figure 12 Queue Hold Messages - Edit Message dialog

### 2.4.2.8 View/Edit message

1. User selects a message by pressing the radio button beside a message. Only one message can be selected.
2. User presses the 'View/Edit message' button, and the 'Edit message' panel is displayed with the 'Message Name' and the 'Message Text' fields populated with the current text of the selected message.

© 2021 CalSAWS. All Rights Reserved.

22

3. User updates the 'Message Name' and/or the 'Message Text' fields.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
  - a. English (default)
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog
  - h. Russian
  - i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
6. If the user presses the 'Save button' the changes are saved and the dialog closes.
7. If the user presses the 'Cancel' button, no changes are made and the dialog closes.

### 2.4.2.9 Queue Hold Messages: Delete Message page mockup

**Contact Center Admin**

**Queue Hold Messages**

This page allows you to maintain the Queue Hold Messages (up to a maximum of 10). Queue Hold messages are played when a customer is waiting in a queue for an agent. Select a message and press a button to View/Edit or Delete:

[View/edit message](#) [Delete message](#) [Add new message](#)

☐ Farmer's Market - April 2021

☒ **EBT - message 1**

☐ VITA

☐ BenefitsCal

☐ Farmer's Market - May 2021

☐ EBT - message 2

☐ County Office business hours

☐ Holiday message 2021

☐ Benefits updates April 2021

☐ County local news May 2021

**Delete Message 2?**

Message Name:

This is the text for example message name 'EBT - message 1'

[Delete](#) [Cancel](#)

**Emergency Open / Close**

**Emergency Message**

**Courtesy Callback**

**Scheduled Callback**

**Queue Limits**

**After Call Work**

**Supervisor email notification**

**Queue Hold Messages**

**Informational Message**

**Roll on/off / Update Agent**

**Create/Delete Team**

**Quick Connects**

**Hours of Operation**

Figure 13 Queue Hold Messages - Delete Message dialog

### 2.4.2.10 Delete message

1. To delete a message, the user selects the message to delete by pressing the radio button beside the message and presses the 'Delete Message' button.
8. The 'Message Name' and/or the 'Message Text' fields are displayed as read-only fields, and 'Delete' and 'Cancel' buttons are displayed.
2. If the user presses the 'Delete' button, the message is deleted. The dialog is closed. The list of messages is updated to display the remaining messages.
3. If the user presses the 'Cancel' button, the dialog is closed, and no action is taken.

### 2.4.3 Assumptions

1. Deleting a message is a permanent deletion and deleted messages are not recoverable. The user can add back a message manually as a new message if it is deleted in error or is needed again.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.5 Courtesy Callback

### 2.5.1 Overview

The Courtesy Callback configuration page allows the Admin user to turn this feature on or off for their County using the Administration page.

When enabled, the Admin user can configure:

- Number of minutes before the callback option is provided to the caller.
- Start and end time range for each day of the week during which the Courtesy Callback feature is enabled.

If Courtesy Callback is not offered for a specific day, the Start time and End time values are left blank.

### 2.5.2 Description of Changes

#### 2.5.2.1 Courtesy Callback Disabled Page mockup

The screenshot shows the 'Contact Center Admin' interface. On the left is a sidebar menu with items: Emergency Open / Close, Emergency Message, Courtesy Callback (highlighted), Scheduled Callback, Queue Limits, After Call Work, Supervisor email notification, Queue Hold Messages, Informational Message, Roll on/off / Update Agent, Create/Delete Team, Quick Connects, and Hours of Operation. The main content area is titled 'Courtesy Callback'. It contains a message: 'The Courtesy Callback feature is currently not enabled. Courtesy Callbacks offer the caller the option to receive a callback from the Contact Center after they have been in a queue for longer than the defined maximum wait time. To enable, select the 'Enable' option below and press 'Save':'. Below this message are two radio buttons: 'Disabled' (selected) and 'Enabled'. A blue 'Save' button is positioned below the radio buttons.

Figure 14 Courtesy Callback feature currently disabled

### 2.5.2.2 Courtesy Callback Disabled

If the Courtesy Callback feature is currently disabled, the only option available is to Enable the feature.

1. User clicks the 'Enabled' radio button. The Cancel button is additionally displayed.
2. If the user presses Save, the Courtesy Callback feature is enabled, and the page is updated to show the Configuration options described in the next section.
3. If the user presses the Cancel button, the change is not saved and the Courtesy Callback feature remains disabled.

### 2.5.2.3 Courtesy Callback Enabled: Page mockups

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Courtesy Callback

The Courtesy Callback feature is currently enabled. Courtesy Callbacks offer the caller the option to receive a callback from the Contact Center after they have been in a queue for longer than the defined maximum wait time.  
To disable, select the 'Disable' option below and press 'Save' :

☐ Disabled  
☒ Enabled

Save

### Configuration Options

Number of minutes before Callback option provided to caller:  (Minimum: 1min, Maximum: 480 mins)

Configure the time ranges per day during which Courtesy Callbacks are offered. Leave the Start and End times blank for any day where Courtesy Callback is not offered:

|           |                          |                       |          |                          |                        |
|-----------|--------------------------|-----------------------|----------|--------------------------|------------------------|
| Monday    | Start Time<br>10:00 AM ▾ | End Time<br>4:00 PM ▾ | Saturday | Start Time<br>10:00 AM ▾ | End Time<br>3:30 PM ▾  |
| Tuesday   | Start Time<br>9:00 AM ▾  | End Time<br>5:00 PM ▾ | Sunday   | Start Time<br>10:00 AM ▾ | End Time<br>11:30 AM ▾ |
| Wednesday | Start Time<br>9:00 AM ▾  | End Time<br>5:00 PM ▾ |          |                          |                        |
| Thursday  | Start Time<br>9:00 AM ▾  | End Time<br>5:00 PM ▾ |          |                          |                        |
| Friday    | Start Time<br>9:00 AM ▾  | End Time<br>3:30 PM ▾ |          |                          |                        |

SaveCancel

Figure 15 Courtesy Callback Enabled Page Mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Courtesy Callback

The Courtesy Callback feature is currently enabled. Courtesy Callbacks offer the caller the option to receive a callback from the Contact Center after they have been in a queue for longer than the defined maximum wait time.  
To disable, select the 'Disable' option below and press 'Save' :

☐ Disabled  
☒ Enabled

Save

Configuration Options

Number of minutes before Callback option provided to caller:
(Minimum: 1min, Maximum: 480 mins)

Configure the time ranges per day during which Courtesy Callbacks are offered. Leave the Start and End times blank for any day where Courtesy Callback is not offered:

|           |            |          |  |          |            |          |          |          |
|-----------|------------|----------|--|----------|------------|----------|----------|----------|
| Monday    | Start Time | 10:00 AM |  | Saturday | Start Time | End Time | 10:00 AM | 3:30 PM  |
| Tuesday   | Start Time | 9:00 AM  |  | Sunday   | Start Time | End Time | 10:00 AM | 11:30 AM |
| Wednesday | Start Time | 9:00 AM  |  |          |            |          |          |          |
| Thursday  | Start Time | 9:00 AM  |  |          |            |          |          |          |
| Friday    | Start Time | 9:00 AM  |  |          |            |          |          |          |

Save

Cancel

Figure 16 Courtesy Callback Enabled Page Mockup showing time selection dropdown

#### 2.5.2.4 Courtesy Callback Enabled

If the Courtesy Callback feature is enabled, the Configuration Options dialog for this feature is also displayed. When the feature is disabled, this dialog is not displayed.

1. If the Courtesy Callback feature was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User enters a positive integer value for number of minutes before a callback is offered to the caller. The minimum value is 1 minute, and the maximum valid value is 480 minutes (8 hours).
3. If the user attempts to enter a value less than the minimum value or greater than the maximum value, the following error message is displayed beside the entry field:

“Enter a numeric value between 1 and 480 minutes.”

4. The user selects a Start Time and End time for each day of the week to define the time ranges where Courtesy Callbacks are available. The values are selected from a dropdown list (see Figure 15) showing times in 30-minute increments (for example, 9:00 AM, 9:30 AM, 10:00 AM).
5. The selected Start Time must be before the End Time, otherwise a validation error message is displayed beside the field in error:

*"The selected Start Time must be before the End Time."*

6. The End Time must be at least 30 minutes after the Start Time, and the End Time must not be the same as the Start Time, otherwise the following error message is display beside the field in error:

*"The End Time must not be the same as the Start Time and must be at least 30 minutes after the Start Time."*

7. Only Start Time and End Time options that are within the defined open hours for the County are displayed. Times outside of the open hours are not displayed as valid options to the user.
8. If Courtesy Callbacks are not required for a specific day, the user can leave the Start Time and End Time blank for that day.
9. If Courtesy Callbacks are enabled, at least one day must have a valid Start time and End time configured.
10. If the user presses 'Cancel', any values entered or changed are discarded and no changes are saved. The Configuration Options dialog will revert to show the currently configured values.

### **2.5.3 Assumptions**

1. The Courtesy Callback Start and End times must be within the same business day. For example:
  - a. Start time of 9 AM and End time of 5 PM is valid
  - b. Start time of 4 PM and End Time if 10 AM is not valid
2. The Start Time and End Time are configurable for each day of the week. If a day is not applicable for that County (e.g. Saturday or Sunday), the Start Time and End Time can be left blank.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.



## 2.6 Scheduled Callback

### 2.6.1 Overview

The Scheduled Callback feature is enabled or disabled using the Administration page. When enabled, the Admin user can specify how many scheduled callbacks are allowed per each available timeslot. The Scheduled Callback functionality will be implemented with SCR CA-229573

### 2.6.2 Description of Changes

#### 2.6.2.1 Scheduled Callback – feature disabled page mockup

| Contact Center Admin          |  |
|-------------------------------|--|
| Emergency Open / Close        | <h3>Scheduled Callback</h3> <p>The Scheduled Callback feature is currently not enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To enable, select the 'Enabled' option below and press 'Save' :</p> <p><input checked="" type="radio"/> Disabled<br/><input type="radio"/> Enabled</p> <p><a href="#">Save</a></p> |
| Emergency Message             |  |
| Courtesy Callback             |  |
| Scheduled Callback            |  |
| Queue Limits                  |  |
| After Call Work               |  |
| Supervisor email notification |  |
| Queue Hold Messages           |  |
| Informational Message         |  |
| Roll on/off / Update Agent    |  |
| Create/Delete Team            |  |
| Quick Connects                |  |
| Hours of Operation            |  |
|                               |  |

#### 2.6.2.2 Scheduled Callback – feature disabled

1. To enable the Scheduled Callback feature, user selects the 'Enabled' option and presses 'Save'.
2. The Scheduled Callback feature is enabled. The page is updated to show the Configuration Options dialog showing in the following page mockup.

### 2.6.2.3 Scheduled Callback – feature enabled page mockup

**Contact Center Admin**

**Scheduled Callback**

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled  
☒ Enabled

**Save**

**Configure Callback Time Slots**

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks |
|---------------------|---------------------|
| 9:00 AM - 10:00 AM  | 1                   |
| 10:00 AM - 11:00 AM | 3                   |

**Add New Time Range** **Delete Time Range** **Save** **Cancel**

Figure 17 Scheduled Callback - feature enabled, 2 example slots defined

### 2.6.2.4 Scheduled Callback – feature enabled

1. If the Scheduled Callback feature is enabled, the 'Configure Callback Time Slots' dialog is displayed, showing the currently configured maximum number of callbacks per time slot.
2. If the Scheduled Callback configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
3. User enters or changes the maximum number of callbacks available per defined timeslot.
4. If 0 is entered for a given timeslot, scheduled callbacks will not be offered to callers for that timeslot.
5. The maximum number of scheduled callbacks per 1 hour time slot is 3. Valid values are 0, 1, 2 and 3.
6. If the user presses 'Save' the system validates the entered values, and if there are no validation errors the values are saved.
7. If any field has an invalid value, it is highlighted in red and an error message is displayed: "One or more timeslots have an invalid value. Please correct the errors and press Save".

8. If the user presses 'Cancel' any changes are discarded and no actions are performed. The displayed callbacks per timeslot revert to the currently configured values.

### 2.6.2.5 Scheduled Callback – Add new time slot page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Contact Center Admin

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled  
☒ Enabled

**Save**

#### Configure Callback Time Slots

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks            |
|---------------------|--------------------------------|
| 9:00 AM - 10:00 AM  | <input type="text" value="1"/> |
| 10:00 AM - 11:00 AM | <input type="text" value="3"/> |

Enter Start Time and End Time for a new Callback Slot, then press 'Add' or 'Cancel' :

Start Time

End Time

**Add**

Cancel

Add New Time Range

Delete Time Range

Save

Cancel

Figure 18 Scheduled Callback - Add new time slot (11:00 AM to 12:00 PM)

### 2.6.2.6 Scheduled Callback – New time slot added page mockup

**Contact Center Admin**

**Scheduled Callback**

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled  
☒ Enabled

**Save**

**Configure Callback Time Slots**

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks |
|---------------------|---------------------|
| 9:00 AM - 10:00 AM  | 1                   |
| 10:00 AM - 11:00 AM | 3                   |
| 11:00 AM - 12:00 PM | 3                   |

**Add New Time Range** **Delete Time Range** **Save** **Cancel**

Figure 19 Scheduled Callback - new time slot added (11:00 AM to 12:00 PM))

### 2.6.2.7 Scheduled Callback – Add new time slot

Figure 18 shows a page mockup with 2 time slots configured (9 AM – 10 AM, and 10 AM to 11 AM), before a new time slot is added.

Figure 19 shows a page mockup after a new time slot added, 11 AM to 12 PM.

1. If the user presses the 'Add new Callback Time Range' button, the dialog to add a new time slot is displayed (as shown in Figure 17).
2. The user selects a Start Time and End Time for the new time slot using the dropdowns. The dropdown lists display available start time and end times at 30-minute increments in 12 hour format (for example, 9:00 AM, 9:30 AM, 10:00 AM, 10:30 AM)
3. If the user presses the 'Add' button, the application validates that:
  - a. the Start Time is on or after the County office opening time,
  - b. the End Time is before the close of business time for this County,
  - c. the new time slot Start Time and End Time does not overlap with any existing time range. For example, if 9:00 AM to 10:00 AM and 10:00 AM to 11:00 AM time slots already exist and the user attempts to add a new 9:30 AM to 10:30 AM time slot, the following error message is displayed:

“The start time and end time (9:30 AM to 10:30 AM) overlaps with existing time slots. Update the start and end times to remove the overlap or press ‘Cancel’”

4. If the new time slot is valid, it is created in the system. The dialog closes, and the displayed list of time slots is updated to show the newly added time slot.
5. If the user presses ‘Cancel’, the dialog is closed, and no changes are saved.

### 2.6.2.8 Scheduled Callback – Adding new time slot before existing slots - page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Contact Center Admin

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled
 ☒ Enabled

Save

#### Configure Callback Time Slots

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks            | Number of callbacks | Number of callbacks            |
|---------------------|--------------------------------|---------------------|--------------------------------|
| 9:00 AM - 10:00 AM  | <input type="text" value="1"/> | 1:00 PM - 2:00 PM   | <input type="text" value="3"/> |
| 10:00 AM - 11:00 AM | <input type="text" value="3"/> | 2:00 PM - 3:00 PM   | <input type="text" value="3"/> |
| 11:00 AM - 12:00 PM | <input type="text" value="0"/> | 3:00 PM - 4:00 PM   | <input type="text" value="2"/> |
| 12:00 PM - 1:00 PM  | <input type="text" value="3"/> | 4:00 PM - 5:00 PM   | <input type="text" value="1"/> |
|                     |                                | 5:00 PM - 6:00 PM   | <input type="text" value="1"/> |

Enter Start Time and End Time for a new Callback Slot, then press 'Add' or 'Cancel' :

Start Time

End Time

Add

Cancel

Add New Time Range

Delete Time Range

Save

Cancel

Figure 20 Scheduled Callback - before adding new slot (8:00 AM to 9:00 AM) before existing slots

### 2.6.2.9 Scheduled Callback – Adding new time slot before existing slots -

1. User presses the ‘Add New Callback Time Range’ button and selects a start and end time before the existing timeslots, for example, 8:00 AM to 9:00 AM.
2. If user presses ‘Save’, the new time slot is added.

- The displayed timeslots are rearranged to appear in ascending time order. In the above example, the new 8:00 AM to 9:00 AM time slot is displayed first, and the existing time slots are updated on the page to display following the new time slot.

### 2.6.2.10 Scheduled Callback – New time slot added before existing slots - page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Contact Center Admin

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled
 ☒ Enabled

Save

#### Configure Callback Time Slots

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks            |                    | Number of callbacks            |                   | Number of callbacks            |
|---------------------|--------------------------------|--------------------|--------------------------------|-------------------|--------------------------------|
| 8:00 AM - 9:00 AM   | <input type="text" value="1"/> | 12:00 PM - 1:00 PM | <input type="text" value="3"/> | 4:00 PM - 5:00 PM | <input type="text" value="1"/> |
| 9:00 AM - 10:00 AM  | <input type="text" value="1"/> | 1:00 PM - 2:00 PM  | <input type="text" value="3"/> | 5:00 PM - 6:00 PM | <input type="text" value="1"/> |
| 10:00 AM - 11:00 AM | <input type="text" value="3"/> | 2:00 PM - 3:00 PM  | <input type="text" value="3"/> |                   |                                |
| 11:00 AM - 12:00 PM | <input type="text" value="0"/> | 3:00 PM - 4:00 PM  | <input type="text" value="2"/> |                   |                                |

Add New Time Range

Delete Time Range

Save

Cancel

Figure 21 Scheduled Callback - new slot (8:00 AM to 9:00 AM) added before existing slots

### 2.6.2.11 Scheduled Callback – New time slot added before existing slots

- Figure 21 shows a new time slot added, 8:00 AM to 9:00 AM, before the existing time slots.
- The existing time slots are updated to display in ascending time order following the newly added time slot.

## 2.6.2.12 Scheduled Callback – Delete time slot - page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

### Contact Center Admin

## Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled  
☒ Enabled

**Delete Callback Time Slots**

Select the time slots to delete and press the Delete button

|  |   |  |
|--|---|--|
| 8:00 AM - 9:00 AM <input type="checkbox"/>   | 12:00 PM - 1:00 PM <input type="checkbox"/> | 4:00 PM - 5:00 PM <input type="checkbox"/> |
| 9:00 AM - 10:00 AM <input type="checkbox"/>  | 1:00 PM - 2:00 PM <input type="checkbox"/>  | 5:00 PM - 6:00 PM <input type="checkbox"/> |
| 10:00 AM - 11:00 AM <input type="checkbox"/> | 2:00 PM - 3:00 PM <input type="checkbox"/>  |  |
| 11:00 AM - 12:00 PM <input type="checkbox"/> | 3:00 PM - 4:00 PM <input type="checkbox"/>  |  |

Figure 22 Scheduled Callback - delete callback time slots

## 2.6.2.13 Scheduled Callback – Delete time slot

1. If the user presses the 'Delete Time Range' button, the 'Delete Callback Time Slots' dialog is displayed (see Figure 21).
2. Checkboxes are displayed beside the configured time slots. (in place of the text entry fields).
3. If the user presses 'Cancel' no changes are made and the configured time slots are displayed.
4. The page flow for selecting time slots is described in the following section.

### 2.6.2.14 Scheduled Callback – Delete time slot, slots selected - page mockup

**Contact Center Admin**

**Scheduled Callback**

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled  
☒ Enabled

**Save**

**Delete Callback Time Slots**

Select the time slots to delete and press the Delete button

|   |   |   |
|---|---|---|
| 8:00 AM - 9:00 AM <input checked="" type="checkbox"/> | 12:00 PM - 1:00 PM <input type="checkbox"/> | 4:00 PM - 5:00 PM <input type="checkbox"/>            |
| 9:00 AM - 10:00 AM <input type="checkbox"/>           | 1:00 PM - 2:00 PM <input type="checkbox"/>  | 5:00 PM - 6:00 PM <input checked="" type="checkbox"/> |
| 10:00 AM - 11:00 AM <input type="checkbox"/>          | 2:00 PM - 3:00 PM <input type="checkbox"/>  |   |
| 11:00 AM - 12:00 PM <input type="checkbox"/>          | 3:00 PM - 4:00 PM <input type="checkbox"/>  |   |

**Add New Time Range** **Delete Time Range** **Delete** **Cancel**

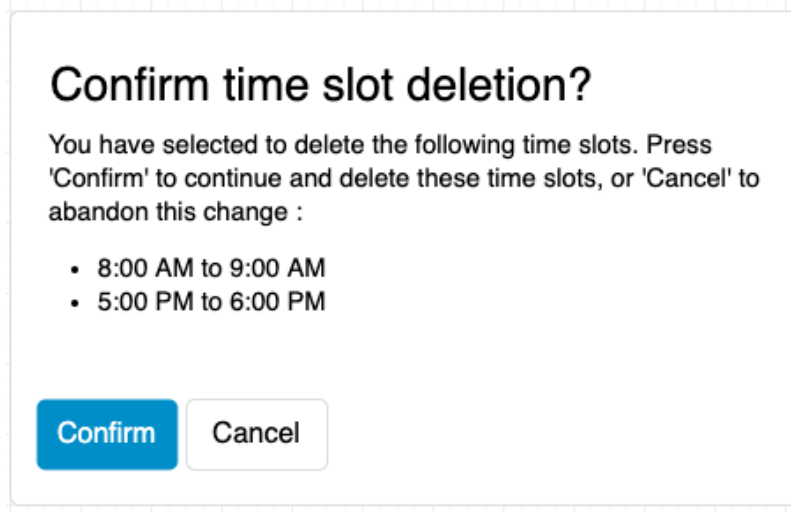
Figure 23 Scheduled Callback - delete time slots, slots selected

### 2.6.2.15 Scheduled Callback – Delete time slot, slots selected

1. The user clicks the checkboxes to select the time range(s) to delete.
2. One or more time range(s) can be selected.
3. In Figure 23, the 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM time slots are selected.
4. If the user presses 'Cancel', no changes are saved, and the currently configured time slots are re-displayed.
5. If the user presses 'Delete', a confirmation dialog is displayed, as shown in the following section.



#### 2.6.2.16 Scheduled Callback – Delete time slot – delete confirmation page mockup



The mockup shows a white rectangular dialog box with a thin grey border. At the top, the title 'Confirm time slot deletion?' is in bold black font. Below the title, a paragraph of text reads: 'You have selected to delete the following time slots. Press 'Confirm' to continue and delete these time slots, or 'Cancel' to abandon this change :'. Underneath this text is a bulleted list containing two items: '8:00 AM to 9:00 AM' and '5:00 PM to 6:00 PM'. At the bottom of the dialog box, there are two buttons: a blue button with the text 'Confirm' in white, and a white button with a grey border and the text 'Cancel' in grey.

Figure 24 Scheduled Callback - Confirm time slot deletion

#### 2.6.2.17 Scheduled Callback – Delete time slot – delete confirmation

1. If the user has selected time ranges to be deleted and presses the 'Delete' button, the confirmation dialog in Figure 24 is displayed.
2. The dialog lists the selected time ranges (for example, 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM).
3. If the user presses the 'Cancel' button, no changes are made, and the user is returned to the 'Delete Callback Time Slots page'.
4. If the user presses 'Confirm' the selected Callback Time Slots are deleted from the system. The user is returned to the 'Configure Callback Time Slots' page, and the page is updated to display the changes (see the following section).
5. Deletion of configured time slots is permanent. If the same time slots are required again at some point in the future, they need to be manually added (following page flow steps in section 2.6.2.7).

### 2.6.2.18 Scheduled Callback – After time slots deleted – page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Contact Center Admin

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

☐ Disabled  
☒ Enabled

**Save**

#### Configure Callback Time Slots

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks            | Number of callbacks | Number of callbacks            |
|---------------------|--------------------------------|---------------------|--------------------------------|
| 9:00 AM - 10:00 AM  | <input type="text" value="1"/> | 1:00 PM - 2:00 PM   | <input type="text" value="3"/> |
| 10:00 AM - 11:00 AM | <input type="text" value="3"/> | 2:00 PM - 3:00 PM   | <input type="text" value="3"/> |
| 11:00 AM - 12:00 PM | <input type="text" value="0"/> | 3:00 PM - 4:00 PM   | <input type="text" value="2"/> |
| 12:00 PM - 1:00 PM  | <input type="text" value="3"/> | 4:00 PM - 5:00 PM   | <input type="text" value="1"/> |

**Add New Time Range** **Delete Time Range** **Save** **Cancel**

Figure 25 Scheduled Callback - after time slots deleted

### 2.6.2.19 Scheduled Callback – After time slots deleted

1. After the user confirms deletion of the selected time slots, the 'Configure Callback Time Slots' page is re-displayed.
2. The page mockup in Figure 24 shows the results of deleting timeslots 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM. These time slots are now no longer displayed. The remaining timeslots are rearranged to fill the available space on the page.

### 2.6.3 Assumptions

1. Implementation of the Scheduled Callback feature will be in SCR CA-229573
2. If callbacks are already scheduled in a time slot that is deleted, those callbacks will remain scheduled.
3. No new callbacks can be scheduled in a time slot after it is deleted.
4. This functionality is disabled for Regional Call Center (RCC) only Counties.

## 2.7 Queue Limits

### 2.7.1 Overview

The Queue Limits feature allows an Admin user to define the maximum number of calls that are allowed in each configured call queue.

Queue names are displayed in ascending alphabetical order. The page displays the queue names and maximum queue lengths for the currently defined queues for the current County. If there are more queues that can be displayed on one page, 'Previous' and 'Next' links are displayed to allow the user to page through the defined queues.

If a queue limit is changed while there are more calls in that queue than the new queue limit, the remaining calls in queue will remain in the queue. Any additional incoming calls will not be added to the queue until the number of calls in the queue is less than the new queue limit.

The page only allows the user to change the maximum queue length for currently defined queues. Note: Counties will need to contact the CalSAWS Project Team to add or remove queues or change the queue names.

## 2.7.2 Description of Changes

### 2.7.2.1 Queue Limits: Page mockup

Contact Center Admin

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Queue Limits

This page allows you to configure the maximum queue length for each of the Contact Center Call Queues:

| Queue Name      | Queue Length                     |
|-----------------|----------------------------------|
| C04_EN_CalFresh | <input type="text" value="10"/>  |
| C04_EN_Chat     | <input type="text" value="15"/>  |
| C04_EN_CW_WW    | <input type="text" value="10"/>  |
| C04_EN_General  | <input type="text" value="20"/>  |
| C04_SP_CalFresh | <input type="text" value="10"/>  |
| C04_SP_Chat     | <input type="text" value="50"/>  |
| C04_SP_CW_WW    | <input type="text" value="10"/>  |
| C04_SP_General  | <input type="text" value="100"/> |

<< Previous | Next >>

Save

Cancel

Figure 26 Queue Limits

### 2.7.2.2 Queue Limits

The Queue Limits page allows the user to configure the maximum number of calls per queue currently defined in the Contact Center.

1. If the Queue Limits configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. Queue names are displayed in ascending alphabetical order.
3. If there are more queues than can be displayed on a single page, pagination links to page forward ("Next") and back ("previous") are displayed at the bottom of the list.
4. If the user is on the first page of queues, the "Previous" link is inactive.
5. If there are no more queues to display, the "Next" link is inactive.
6. User changes the queue limit for 1 or more number of queues currently displayed on the page. The entered value is an positive integer, less than 1000.

7. If no queue depth limit is required for a queue, the user can leave the value blank (this indicates no limit).
8. If the user attempts to navigate away from this page by paging forward/back or choosing another menu option, they are prompted to 'Save' or 'Cancel' their changes first – a dialog with the following message is displayed:

*"You have unsaved changes on this page. You must save or cancel your changes before leaving the page"*

9. If the user presses 'Save' any updated queue limit values are saved.
10. If the user presses 'Cancel' any changes are discarded and no actions are taken. The page is updated to show the original values.

## **2.8 After Call Work Limit**

### **2.8.1 Overview**

The After Call Work (ACW) Limit feature allows an Admin user to define the maximum number of minutes an Agent is allowed to perform After Call Work.

## 2.8.2 Description of Changes

### 2.8.2.1 After Call Work Limit – page mockups

### Contact Center Admin

|                               |   |
|-------------------------------|---|
| Emergency Open / Close        | <h2>After Call Work Limit</h2> <p>Enter the number of allowed minutes for the After Call Work: <span>Minutes</span> <b>5</b></p> <p><b>Save</b> <b>Cancel</b></p> |
| Emergency Message             |   |
| Courtesy Callback             |   |
| Scheduled Callback            |   |
| Queue Limits                  |   |
| After Call Work               |   |
| Supervisor email notification |   |
| Queue Hold Messages           |   |
| Informational Message         |   |
| Roll on/off / Update Agent    |   |
| Create/Delete Team            |   |
| Quick Connects                |   |
| Hours of Operation            |   |
|                               |   |
|                               |   |

Figure 27 After Call Work Limit

### Contact Center Admin

|                               |   |
|-------------------------------|---|
| Emergency Open / Close        | <h2>After Call Work Limit</h2> <p>Enter the number of allowed minutes for the After Call Work: <span>Minutes</span> <b>Unlimited</b></p> <p><b>Save</b> <b>Cancel</b></p> |
| Emergency Message             |   |
| Courtesy Callback             |   |
| Scheduled Callback            |   |
| Queue Limits                  |   |
| After Call Work               |   |
| Supervisor email notification |   |
| Queue Hold Messages           |   |
| Informational Message         |   |
| Roll on/off / Update Agent    |   |
| Create/Delete Team            |   |
| Quick Connects                |   |
| Hours of Operation            |   |
|                               |   |
|                               |   |

Figure 28 After Call Work Limit – dropdown list to select minutes

### **2.8.2.2 After Call Work Limit**

1. If the After Call Work Limit configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. The user selects a new value for the After Work Call Limit from a dropdown list. Valid options are displayed in the list from Unlimited to 90 minutes in the following increments:
  - a. 5-minute increments from 5 to 30 minutes,
  - b. 10 minute increments from 30 to 90 minutes.
3. If 'Unlimited' is selected, this means the After Call Work Limit check is disabled.
4. If user presses the 'Save' button, the changes are saved.
5. If the user presses the "Cancel" button, any change to the value is discarded, and the current configured value is displayed.

## **2.9 Roll-on/Roll-off / Update Agent**

### **2.9.1 Overview**

The Roll-on/Roll-off / Update Agent feature allows an Admin user to roll-on and roll-off Agents from the Contact Center. It also allows an Admin user to search for and update existing Agent details (for example, assigned Team and Routing Profile).

The Admin user can roll-on up to the maximum number of licenses available for the current county. The number of currently rolled-on Agents and the licenses remaining is displayed on the page.

When new Agents are created, existing integration with eGain and Calabrio will create new accounts in those systems when the new Agent logs on to the Contact Center for the first time.

### **2.9.2 Description of Changes**

### 2.9.2.1 Roll-on/Roll-off page mockup

Contact Center Admin

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Roll-on/off / Update Agent

Current agents: 25 Licenses remaining: 15

Search for Agent by Last Name:

Search

View/edit agent

Roll-off agent

Add new agent

|                       | Last name | First name | County email                   |
|-----------------------|-----------|------------|--------------------------------|
| <input type="radio"/> | Beaty     | Bennie     | bbeaty@examplecounty.ca.gov    |
| <input type="radio"/> | Bergham   | Alena      | abergham@examplecounty.ca.gov  |
| <input type="radio"/> | Bins      | Emanuel    | ebins@examplecounty.ca.gov     |
| <input type="radio"/> | Bodie     | Dee        | dbodie@examplecounty.ca.gov    |
| <input type="radio"/> | Botsford  | Ramon      | rbotsford@examplecounty.ca.gov |
| <input type="radio"/> | Carter    | Maggie     | mcarter@examplecounty.ca.gov   |
| <input type="radio"/> | Cole      | Peter      | pcole@examplecounty.ca.gov     |
| <input type="radio"/> | Collier   | Ida        | icollier@examplecounty.ca.gov  |

<< Previous | Next >>

### 2.9.2.2 Roll-on/Roll-off

1. On entry to the Roll-on/Roll-off page, the list of current Agents is displayed in ascending alphabetical order by last name.
2. The number of currently rolled-on Agents is displayed in the top right of the page, along with the number of licenses remaining for the current County.
3. The page displays 10 Agents at a time. The user can paginate/browse through Agents by pressing the 'Previous' and 'Next' links.
4. If the user is already on the first page of Agents, the 'Previous' link is disabled.
5. If the user is on the last page of Agents, the 'Next' button is disabled.
6. If there are Agents before and after the current page, both 'Previous' and 'Next' links are enabled.
7. To search for a specific Agent, the user enters the Last Name of an Agent to search for and presses 'Search'.
8. Searching with 'like' criteria is supported, for example, if 'D' is entered, Agents with Last Name starting with 'D' are returned and displayed in ascending alphabetical order.



9. By default, no Agents are selected in the search results when the page is first displayed.
10. When an Agent is not selected, the 'View/Edit Agent' and 'Roll-off Agent' buttons are not enabled, only the 'Add new agent' button is enabled
11. If the user presses the 'Add New Agent' button, the 'Add New Agent' dialog is displayed – see the following page mockup and page flow.

### 2.9.2.3 Roll-on/Roll-off – Agent selected page mockup

**Contact Center Admin**

Emergency Open / Close  
Emergency Message  
Courtesy Callback  
Scheduled Callback  
Queue Limits  
After Call Work  
Supervisor email notification  
Queue Hold Messages  
Informational Message  
**Roll on/off / Update Agent**  
Create/Delete Team  
Quick Connects  
Hours of Operation

**Roll-on/off / Update Agent**

Current agents: 25 Licenses remaining: 15

Search for Agent by Last Name:

|                                  | Last name | First name | County email                   |
|----------------------------------|-----------|------------|--------------------------------|
| <input type="radio"/>            | Beaty     | Bennie     | bbeaty@examplecounty.ca.gov    |
| <input type="radio"/>            | Bergham   | Alena      | abergham@examplecounty.ca.gov  |
| <input checked="" type="radio"/> | Bins      | Emanuel    | ebins@examplecounty.ca.gov     |
| <input type="radio"/>            | Bodie     | Dee        | dbodie@examplecounty.ca.gov    |
| <input type="radio"/>            | Botsford  | Ramon      | rbotsford@examplecounty.ca.gov |
| <input type="radio"/>            | Carter    | Maggie     | mcarter@examplecounty.ca.gov   |
| <input type="radio"/>            | Cole      | Peter      | pcole@examplecounty.ca.gov     |
| <input type="radio"/>            | Collier   | Ida        | icollier@examplecounty.ca.gov  |

<< Previous | Next >>

Figure 29 Roll-on / Roll-off / Update Agent

### 2.9.2.4 Roll-on/Roll-off – Agent selected

1. If the user selects an Agent by pressing the radio button beside an Agent Last Name, the 'View/Edit Agent' and 'Roll-off Agent' buttons are enabled.
2. If an Agent is selected and the user presses the 'View/Edit Agent' button, the 'View/Edit Agent' dialog is displayed – see the following page mockup and page flow.

3. If an Agent is selected and the user presses the 'Roll-off Agent' button, the 'Roll-off Agent' dialog is displayed – see the following page mockup and page flow.

### 2.9.2.5 Roll-on/Roll-off – View/Edit Agent page mockup

Contact Center Admin

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Roll-on/off / Update Agent

Current agents: 25 Licenses remaining: 15

Search for Agent by Last Name:

Search

View/edit agent

Roll-off agent

Add new agent

View / Edit Agent

First name

John

Last name

Smith

Windows Login Id

SmithJ

Role

Agent

Team

Team A

Routing Profile

Profile A

Email

jsmith@examplecounty.ca.gov

CalSAWS User Id

SmithJ

After Call Work limit (mins)

60

Note: leave blank to use global After Call Work limit value

Save

Cancel

Figure 30 Roll-on / Roll-off - View/Edit Agent

### 2.9.2.6 Roll-on/Roll-off – View/Edit Agent

1. If the 'View/Edit Agent' button is pressed, the 'View/Edit Agent' dialog is displayed.
2. The user can edit the First Name, Last Name, Role, Team, Email, Routing Profile and After Call Work Limit fields.
3. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used instead.
4. The Windows Login Id and CalSAWS User Id values cannot be changed, they are displayed as read-only fields. To change these values the Agent

must be rolled-off from the Contact Center, changed in the CalSAWS application, and then rolled-on to the Contact Center as a new user.

5. If the user presses the 'Save' button, the values are saved, and the 'View/Edit Agent' dialog is closed.
6. If the user presses the 'Cancel' button, the dialog is closed, and any changes are discarded.

### 2.9.2.7 Roll-on/Roll-off – Add Agent page mockup

Contact Center Admin

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Roll-on/off / Update Agent

Current agents: 25 Licenses remaining: 15

Search for Agent by Last Name:

Search

View/edit agent

Roll-off agent

Add new agent

Add Agent

First name

John

Last name

Smith

Windows Login Id

SmithJ

Role

Agent

Team

Team A

Routing Profile

Profile A

Email

jsmith@examplecounty.ca.gov

CalSAWS User Id

SmithJ

After Call Work limit (mins)

60

Note: leave blank to use global After Call Work limit value

Save

Cancel

Figure 31 Roll-on / Roll-off - Add Agent

### 2.9.2.8 Roll-on/Roll-off – Add Agent

1. If the 'Add New Agent' button is pressed, the 'Add New Agent' dialog is displayed.
2. This page allows the user to roll-on new Agents up to the maximum number of licenses configured. The number of currently rolled-on Agents

and the number of licenses remaining is displayed in the top right of the page.

3. The user enters values for First Name, Last Name, Role (from a dropdown showing 'Admin' and 'Supervisor' values), Team (from a dropdown showing currently configured Teams) and Email fields.
4. The user enters the Agent's current Windows Login Id and CalSAWS User Id - these cannot be changed and must match their current User Id values.
5. The system validates that the entered CalSAWS User Id is an existing User Id and that this user has not already been rolled-on as a Contact Center Agent.
6. The user enters values for Routing Profile (from a dropdown showing currently configured Routing Profiles), and After Call Work limit (in minutes).
7. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used.
8. If the user presses the 'Save' button, the new Agent is created in the following applications:
  - a. Contact Center Cloud
  - b. Contact Center WFM
  - c. Contact Center QA
  - d. Contact Center Reporting

### 2.9.2.9 Roll-on/Roll-off – Roll-off Agent page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Contact Center Admin

Roll-on/off / Update Agent

Current agents: 25 Licenses remaining: 15

Search for Agent by Last Name:

Roll-off Agent?

First nameJohn

Last nameSmith

Windows Login IdSmithJ

RoleAgent

TeamTeam A

Emailjsmith@examplecounty.ca.gov

CalSAWS User IdSmithJ

To confirm rolling off this selected agent, press the 'Roll-off' button. This action removes their access from the Contact Center.

Figure 32 Roll-on/Roll-off - Delete Agent

### 2.9.2.10 Roll-on/Roll-off – Roll-off Agent

1. If the user selects an Agent and presses the 'Roll-off Agent' button, the 'Roll-off Agent' dialog is displayed (Figure 28).
2. The following fields are displayed as read-only to identify the Agent:
  - a. First name / Last Name
  - b. Email
  - c. Windows Logon Id
  - d. CalSAWS User Id
  - e. Role
  - f. Team
3. If the user presses the 'Roll-off' button, the Agent is removed from the Contact Center. After this point the removed user will no longer have access to the Contact Center, but any prior access and roles within the CalSAWS system remain unchanged.
4. The Roll-off Agent change is permanent. If access for an Agent needs to be restored, the Admin needs to repeat the Roll-on Agent steps as

described in section 2.9.28. Additionally, the Roll-off Agent action has the following impacts to agent and call history data reporting:

- a. Agent data is no longer available for reporting in eGain by County users. The data can be restored by CalSAWS Contact Center operations team if needed.
  - b. Agent is marked as inactive and data is no longer available to Calabrio. If data is required for an inactive agent, the agent can be moved back to Active status by CalSAWS Contact Center operations team if needed.
5. If the user presses the 'Cancel' button, no changes are made. The 'Roll-off Agent' dialog is closed, and the user is returned to the main 'Roll-on / Roll-off / Update Agent' page as shown in Figure 28.

## **2.10 Emergency Message**

### **2.10.1 Overview**

This page allows the user to create, edit, delete and select the current Emergency Message for their County. The user can define up to 10 Emergency Messages. The currently selected message is the chosen message that plays while the Contact Center is in Emergency Closure mode (see section 2.3).

If there is no currently selected Emergency Message, a default message will play.

The default message cannot be changed or deleted and is only used when no other Emergency Messages are defined, and/or none of the custom messages are currently selected as the current message for playback during an Emergency Closure.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

The following sections describe how the Emergency Messages are created and maintained.

## 2.10.2 Description of Changes

### 2.10.2.1 Emergency Message – page mockup

**Contact Center Admin**

Emergency Open / Close

**Emergency Message**

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

### Emergency Message

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

☒ Default Emergency Message

#### Default Emergency Message

This is the default Emergency Message. If no other Emergency Messages are defined or if no other message is selected, this Emergency Message will play for inbound calls when the Contact Center is closed due to an emergency. This message cannot be edited, but you can add up to 9 other custom messages, and select one of those messages to play instead.

Message text (max 260 words):

The Contact Center is currently closed due to an emergency. Please call back at a later date.

Message length: 11 of 260 words

Figure 33 Emergency Message - no messages defined

### 2.10.2.2 Emergency Message – No messages defined

1. When there are no custom Emergency Messages defined, the only enabled button is 'Add New Message'.
2. The default Emergency Message is selected and is shown as the current Emergency Message.
3. If the Contact Center is closed using the Emergency Open/Close feature when there are no other Emergency Messages defined, the default message is played:

*"The Contact Center is currently closed due to an emergency. Please call back at a later date."*

4. The default Emergency Message cannot be deleted or edited.
5. If user presses 'Add New Message', see following section for page mockup and page flow.

### 2.10.2.3 Emergency Message – Messages defined, no message selected page mockup

**Contact Center Admin**

Emergency Open / Close

**Emergency Message**

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Emergency Message

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

☐ Default Emergency Message

☐ This is message name 1

☐ This is message name 2

☐ This is message name 3

☐ This is message name 4

☐ This is message name 5

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

Current Emergency Message

Figure 34 Emergency Message - messages defined, no selected message

### 2.10.2.4 Emergency Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Emergency Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Emergency Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.



### 2.10.2.5 Emergency Message – Messages defined, message selected page mockup

**Contact Center Admin**

**Emergency Message**

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

☐ Default Emergency Message

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 5

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

Figure 35 Emergency Message - messages defined and message selected

### 2.10.2.6 Emergency Message – Messages defined; message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.

To View/edit a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'View/Edit Message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Delete Message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Emergency Message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Select Emergency Message' button. See next section for page mockup and flow.

## 2.10.2.7 Emergency Message – View/Edit Message page mockup : English selected language

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

### Contact Center Admin

## Emergency Message

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Emergency Message

☐ Default Emergency Message

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 5

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

Current Emergency Message

This is message name 5

### Edit message

English

Message Name: This is message name 3

Message text (max 260 words):  
This is the text for example Emergency Message for name 3

Message length: 11 of 260 words

Play preview: 0:00 / 0:00

Save

Cancel

Figure 36 Emergency Message - view/edit message

### 2.10.2.8 Emergency Message – View/Edit Message page mockup : Language selection dropdown

**Contact Center Admin**

**Emergency Message**

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

☐ Default Emergency Message

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 5

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

**Edit message**

Message Name:

Message text (max 260 words):

Message length: 11 of 260 words

Play preview:

English (default) ▼  
Spanish  
Farsi  
Vietnamese  
Mandarin  
Armenian  
Tagalog  
Russian  
Korean  
Cambodian  
Hmong  
Cantonese  
Arabic  
Lao

Figure 37 Emergency Message - Language selection dropdown

### 2.10.2.9 Emergency Message – View/Edit Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to view or edit and presses the 'View/Edit Message' button. The Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
  - a. English (default)
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog
  - h. Russian

- i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
6. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'View/Edit' button, the View/Edit dialog is display showing the default message text, but the 'Save' button is disabled.
  7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
  8. If the user presses "Save", text changes for any of the selected languages are saved and the dialog closes.
  9. If the user presses "Cancel", the changes are discarded and the dialog closes.

#### 2.10.2.10 Emergency Message – Delete Message page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

### Contact Center Admin

## Emergency Message

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Emergency Message

☐ Default Emergency Message

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 5

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

Current Emergency Message

This is message name 3

This is the text for example Emergency Message name 3

Delete

Cancel

Figure 38 Emergency Message - delete message

### 2.10.2.11 Emergency Message – Delete Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to delete and presses the 'Delete Message' button. The Delete Message dialog is displayed.
2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Emergency Message is permanent. To add back the same message, the Admin user adds a new message following the page flow in section 2.10.2.12.
4. When a message is deleted, all language translations for that selected message are deleted at the same time.
5. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'Delete message' button, a warning dialog is displayed with the following error message:

*"The Default Emergency Message cannot be deleted or modified. Please select one of the other custom messages."*

6. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

## 2.10.2.12 Emergency Message – Add New Message page mockup

**Contact Center Admin**

Emergency Open / Close

**Emergency Message**

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

### Emergency Message

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

[View/Edit Message](#) [Delete Message](#) [Add New Message](#) [Select Emergency Message](#)

☐ Default Emergency Message

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 5

☐ This is message name 6

**Add new message** English ▼

Message Name:

Message text (max 260 words):

Message length: 13 of 260 words

Play preview: 0:00 / 0:00 ▶ ⏸ ⏹

[Save](#) [Cancel](#)

Figure 39 Emergency Message - Add new message

## 2.10.2.13 Emergency Message – Add New Message

If there are less than 10 Emergency Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
  - a. English (default)
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog

- h. Russian
  - i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
  7. If the user presses "Save", the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
  8. If the user presses "Cancel", the changes are discarded and the dialog closes.

#### 2.10.2.14 Emergency Message – Select Emergency Message page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Emergency Message

This page allows you to maintain the Emergency Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Emergency Message

☐ Default Emergency Message
☐ This is message name 1
☐ This is message name 2
☒ This is message name 3
☐ This is message name 4

Current Emergency Message

☐ This is message name 5
☐ This is message name 6

Select Emergency Message

The current Emergency Message is: This is message name 5

You have selected to change the Emergency Message to: This is message name 3

To confirm this change press 'Confirm', otherwise press 'Cancel' to keep the current message.

Confirm

Cancel

Figure 40 Emergency Message - Select message

### 2.10.2.15 Emergency Message – Select Emergency Message

The user can only select a new Emergency Message if there is at least 1 message defined. The 'Select Emergency Message' button is enabled if there is at least 1 message defined.

If there are no Emergency Messages configured or if a message has not yet been selected as the current Emergency Message, a default message is played when the Contact Center is closed using the Emergency Open/Close feature:

*"The Contact Center is currently closed due to an emergency. Please call back later."*

This default message cannot be changed and is only used in the scenario as described above.

To select a current Emergency Message:

1. If the current Emergency Message was last changed more than 1 minute ago, the User is allowed to select a new message. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Emergency Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Emergency Message, then 'Select Emergency Message' button is disabled.
4. If the user selects a different message than the currently configured Emergency Message, the 'Select Emergency Message' button is enabled.
5. User presses the 'Select Emergency Message' button and the Select Emergency Message dialog is displayed.
6. The dialog shows the currently configured Emergency Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Emergency Message. The Select Emergency Message dialog is closed, the list of configured messages is updated to show the newly selected Emergency Message.
8. If the user presses the 'Cancel' button the Select Emergency Message dialog is closed and there is no change to the currently configured Emergency Message.

### 2.10.3 Assumptions

1. Only 1 message can be selected as the current Emergency Message.



2. The emergency message will play following the customer requesting to speak to a worker/agent when the call center is closed due to emergency. The customer will not be transferred into a queue.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## **2.11 Informational Message**

### **2.11.1 Overview**

The Informational Message feature allows an Admin user to maintain the Informational Messages. This page allows the Admin user to view and edit messages, delete messages, add new messages, and select the current Informational Message.

The configuration page allows the Admin user to select one Informational Message as the currently enabled message.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

## 2.11.2 Description of Changes

### 2.11.2.1 Informational Message – page mockup

### Contact Center Admin

|                               |  |
|-------------------------------|--|
| Emergency Open / Close        | <h2>Informational Message</h2> <p>This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:</p> <div><button>View/Edit message</button><button>Delete Message</button><button>Add New Message</button><button>Select Current Message</button></div> <p>There are currently no messages defined. Press 'Add new message' to add a new message.</p> |
| Emergency Message             |  |
| Courtesy Callback             |  |
| Scheduled Callback            |  |
| Queue Limits                  |  |
| After Call Work               |  |
| Supervisor email notification |  |
| Queue Hold Messages           |  |
| Informational Message         |  |
| Roll on/off / Update Agent    |  |
| Create/Delete Team            |  |
| Quick Connects                |  |
| Hours of Operation            |  |
|                               |  |

Figure 41 Informational Message - no messages defined

#### 2.11.2.2 Informational Message – No messages defined

1. When there are no Informational Messages defined, the only enabled button is 'Add New Message'.
2. If user presses 'Add New Message', see following section for page mockup and page flow.

### 2.11.2.3 Informational Message – Messages defined, no message selected page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Informational Message

This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Current Message

Current Informational Message

☐ This is message name 5

☐ This is message name 1

☐ This is message name 2

☐ This is message name 3

☐ This is message name 4

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

☐ This is message name 10

Figure 42 Informational Message - no message selected

### 2.11.2.4 Informational Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Informational Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Current Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.

### 2.11.2.5 Informational Message – Messages defined, message selected page mockup

**Contact Center Admin**

**Informational Message**

This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

[View/Edit Message](#) [Delete Message](#) [Add New Message](#) [Select Current Message](#)

**Current Informational Message**

☐ This is message name 5

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

☐ This is message name 10

Figure 43 Informational Message - message selected

### 2.11.2.6 Informational Message – Messages defined, message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.

To View/edit a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'View/edit message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Delete message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Informational Message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Select Current Message' button. See next section for page mockup and flow.

### 2.11.2.7 Informational Message – View/Edit Message page mockup: selected language: English

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Informational Message

This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Current Message

Current Informational Message

☐ This is message name 5

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

☐ This is message name 10

### View/Edit Message

English ▼

Message Name:

Message text (max 260 words): 

This is the text for example Informational Message for name 3

Message length: 11 of 260 words

Play preview: 

▶ 0:00 / 0:00 ◀

Save

Cancel

Figure 44 Informational Message - View/Edit Message

## 2.11.2.8 Informational Message – View/Edit Message page mockup: Language selection dropdown

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

### Contact Center Admin

## Informational Message

This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Current Message

Current Informational Message

☐ This is message name 5

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 6

☐ This is message name 7

☐ This is message name 8

☐ This is message name 9

☐ This is message name 10

### View/Edit Message

Message Name:

Message text (max 260 words):  

This is the text for example Informational Message

Message length: 11 of 260 words

Play preview: 

0:00 / 0:00

English (default) ▼

Spanish

Farsi

Vietnamese

Mandarin

Armenian

Tagalog

Russian

Korean

Cambodian

Hmong

Cantonese

Arabic

Lao

Save

Cancel

Figure 45 Informational Message - Language selection

### 2.11.2.9 Informational Message – View/Edit Message page mockup: selected language: Spanish

The mockup shows a web interface for 'Contact Center Admin'. On the left is a sidebar menu with options: Emergency Open / Close, Emergency Message, Courtesy Callback, Scheduled Callback, Queue Limits, After Call Work, Supervisor email notification, Queue Hold Messages, Informational Message (highlighted), Roll on/off / Update Agent, Create/Delete Team, Quick Connects, and Hours of Operation. The main content area is titled 'Informational Message' and includes a description: 'This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:'. Below this are four buttons: 'View/Edit Message' (active), 'Delete Message', 'Add New Message', and 'Select Current Message'. A section titled 'Current Informational Message' contains a list of radio buttons for selecting a message (names 1 through 10), with 'This is message name 3' selected. To the right is a 'View/Edit Message' dialog box. It has a language dropdown set to 'Spanish'. The 'Message Name' field contains 'This is message name 3'. The 'Message text (max 260 words):' field contains 'Este es el texto por ejemplo mensaje informativo 3'. Below the text field, it says 'Message length: 11 of 260 words'. At the bottom of the dialog are a 'Play preview' button with a progress bar showing '0:00 / 0:00', and 'Save' and 'Cancel' buttons.

Figure 46 Informational Message - Spanish language

### 2.11.2.10 Informational Message – View/Edit Message

1. User selects an Informational Message by pressing the radio button next to the message to view or edit and presses the 'View/Edit Message' button. The View/Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
  - a. English (default)
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog

- h. Russian
  - i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
  7. If the user presses "Save", changes to the text for any of the languages selected from the Languages dropdown are saved and the dialog closes.
  8. If the user presses "Cancel", all changes are discarded and the dialog closes.

### 2.11.2.11 Informational Message – Delete Message page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Contact Center Admin

### Informational Message

This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

View/Edit Message

Delete Message

Add New Message

Select Current Message

Current Informational Message

☐ This is message name 5
 ☐ This is message name 1
 ☐ This is message name 2
 ☒ This is message name 3
 ☐ This is message name 4
 ☐ This is message name 6
 ☐ This is message name 7
 ☐ This is message name 8
 ☐ This is message name 9
 ☐ This is message name 10

### Delete Message 3?

Message Name:

This is the text for example Informational Message name 3

Delete

Cancel

Figure 47 Informational Message - Delete Message

### 2.11.2.12 Informational Message – Delete Message

1. User selects an Informational Message by pressing the radio button next to the message they want to delete and presses the 'Delete Message' button. The Delete Message dialog is displayed.



2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Informational Message is permanent. To add back a message the Admin user creates a new message following the page flow in section 2.11.2.12.
4. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

### 2.11.2.13 Informational Message – Add New Message page mockup

Figure 48 Informational Message - Add New Message

### 2.11.2.14 Informational Message – Add New Message

If there are less than 10 Informational Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.

4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
  - a. English (default)
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog
  - h. Russian
  - i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses "Save", the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses "Cancel", the changes are discarded and the dialog closes.

### 2.11.2.15 Informational Message – Select Informational Message page mockup

**Contact Center Admin**

Emergency Open / Close  
Emergency Message  
Courtesy Callback  
Scheduled Callback  
Queue Limits  
After Call Work  
Supervisor email notification  
Queue Hold Messages  
**Informational Message**  
Roll on/off / Update Agent  
Create/Delete Team  
Quick Connects  
Hours of Operation

## Informational Message

This page allows you to maintain the Informational Messages (up to a maximum of 10). Select a message and press a button to View/Edit or Delete:

[View/Edit Message](#) [Delete Message](#) [Add New Message](#) [Select Current Message](#)

**Current Informational Message**

☐ This is message name 5

☐ This is message name 1

☐ This is message name 2

☒ This is message name 3

☐ This is message name 4

☐ This is message name 6

## Select Informational Message

The current Informational Message is: This is message name 5

You have selected to change the Informational Message to: This is message name 3

To confirm this change press 'Confirm', otherwise press 'Cancel' to keep the current message.

[Confirm](#) [Cancel](#)

Figure 49 Informational Message - Select Message

### 2.11.2.16 Informational Message – Select Informational Message

The user can only select a new Informational Message if there is at least 1 configured message. The 'Select Current Message' button is only enabled if there is at least 1 message defined.

1. If the current Informational Message was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Informational Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Informational Message, then 'Select Current Message' button is disabled.
4. If the user selects a different message than the currently configured Informational Message, the 'Select Informational Message' button is enabled.
5. User presses the 'Select Current Message' button and the Select Informational Message dialog is displayed.

6. The dialog shows the currently configured Informational Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Informational Message. The Select Informational Message dialog is closed, the list of configured messages is updated to show the newly selected Informational Message.
8. If the user presses the 'Cancel' button the Select Informational Message dialog is closed and there is no change to the currently configured Informational Message.

### **2.11.2.17 Assumptions**

1. The informational message will play following language selection in the counties inbound IVR.
2. If there are no informational messages defined and/or there is no currently selected message, no informational messages are played during calls.
3. If a message is deleted, all language versions of that message (e.g. English and Spanish) are deleted at the same time.
4. If an alternative language version for a message is not needed, leaving the message text blank means there is no version of the message in that language.
5. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## **2.12 Supervisor Email Notification**

### **2.12.1 Overview**

The Supervisor Email notification page allows an Admin user to define thresholds and notifications for Contact Center metrics. If the threshold is exceeded for a specific metric, the system sends a notification email to the specified email address(es).

The Admin user can turn on or off all notifications, or enable any combination of the notifications that apply for their County.

Enabling or disabling any of the notifications is immediately changed within the system.

## 2.12.2 Description of Changes

### 2.12.2.1 Supervisor Email Notification – all notifications off, page mockup

Contact Center Admin

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Supervisor Email Notification

This page allows you to configure thresholds for sending email notifications. For each email address field, you can enter one or more email addresses separated by a semi-colon ';'.

Maximum calls in queue exceeded notification

On

Off

Maximum number of calls waiting in a queue

If exceeded, send notification email to:

Longest allowed call wait time:

On

Off

Longest allowed call wait time (minutes)

If exceeded, send notification email to:

After Call Work allow time exceed notification

On

Off

After Call Work maximum allowed time (mins)

If exceeded, send notification email to:

Minimum number of available agents notification

On

Off

Minimum number of available agents

If less, send notification email to:

Rolled Over Not Ready (RONA) notification for Covered CA (RCC) Agents

On

Off

Team name for Roll Over Not Ready trigger

If triggered, send notification email to:

Save

Cancel

Figure 50 Supervisor Email Notification - Notifications Off

### 2.12.2.2 Supervisor Email Notification – all notifications off

1. User opens the Supervisor Email Notification page.
2. Configurable values for each notification are disabled unless the notification is enabled.

© 2021 CalSAWS. All Rights Reserved.

73

3. If user turns 'on' a notification, the configurable values for that notification are enabled. See details in following page mock ups and page flows.

### 2.12.2.3 Supervisor Email Notification – selective notifications on, page mockup

Contact Center Admin

Emergency Open / Close  
Emergency Message  
Courtesy Callback  
Scheduled Callback  
Queue Limits  
After Call Work  
Supervisor email notification  
Queue Hold Messages  
Informational Message  
Roll on/off / Update Agent  
Create/Delete Team  
Quick Connects  
Hours of Operation

Supervisor Email Notification

This page allows you to configure thresholds for sending email notifications. For each email address field, you can enter one or more email addresses separated by a semi-colon ';' :

Maximum calls in queue exceeded notification
☒ On
☐ Off

Maximum number of calls waiting in a queue

If exceeded, send notification email to:

Longest allowed call wait time
☐ On
☒ Off

Longest allowed call wait time (minutes)

If exceeded, send notification email to:

After Call Work allow time exceed notification
☐ On
☒ Off

After Call Work maximum allowed time (mins)

If exceeded, send notification email to:

Minimum number of available agents notification
☐ On
☒ Off

Minimum number of available agents

If less, send notification email to:

Rolled Over Not Ready (RONA) notification for Covered CA (RCC) Agents
☐ On
☒ Off

Team name for Roll Over Not Ready trigger

If triggered, send notification email to:

Save

Cancel

Figure 51 Supervisor Email Notification - one enabled notification

### 2.12.2.4 Supervisor Email Notification – selective notifications on

1. When the user enables a notification option, the configurable values are enabled.

2. The page mockup shows the 'Maximum calls in queue' notification is enabled and the 'Maximum number of calls waiting in queue' and 'If exceeded, send notification to' entry fields are enabled.
3. User enters values for 'Maximum calls in queue' and 'If exceeded, send notification to' email field. The user can enter multiple email addresses separated by a semi-colon (;). For example:  
*admin1@county1.ca.gov; admin2@county1.ca.gov*
4. If other notifications are enabled, valid values and ranges are defined in the following table "Valid values for notification options"
5. If user presses 'Save', the changed values are saved.
6. If the user presses 'Cancel', all changed values are discarded. The currently configured values for enabled notifications are displayed. No actions are taken.

#### **2.12.2.5 Supervisor Email Notification – Valid values for notification options**

| <b>Configurable option / Email trigger threshold</b> | <b>Email trigger event</b>  | <b>Unit type / value</b> | <b>Minimum valid value</b> | <b>Maximum valid value</b> |
|--|---|--------------------------|----------------------------|----------------------------|
| Maximum number of calls waiting in queue             | Number of calls in queue exceeds the specified value                | Integer                  | 1                          | 500                        |
| Longest allowed call wait time                       | Any queue waiting in queue exceeds the specified value              | Integer, minutes         | 1                          | 480                        |
| After Call Work maximum allowed time                 | Any agent spending longer than specified value on 'After Call Work' | Integer, minutes         | 5                          | 480                        |
| Minimum number of available agents                   | When number of available agents is less than the                    | Integer                  | 1                          | 500                        |

|  |   |              |     |     |
|--|---|--------------|-----|-----|
|  | specified value   |              |     |     |
| Covered CA (RCC) Agents that is enabled for monitoring the 'Rolled Over Not Ready' state | If Covered CA agent in team becomes 'Rolled Over Not Ready' for then email notification is sent | Name of team | n/a | n/a |



### 2.12.2.6 Supervisor Email Notification – all notifications enabled, page mockup

Contact Center Admin

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Supervisor Email Notification

This page allows you to configure thresholds for sending email notifications. For each email address field, you can enter one or more email addresses separated by a semi-colon ';'.

Maximum calls in queue exceeded notification

☒ On ☐ Off

Maximum number of calls waiting in a queue

If exceeded, send notification email to:

Longest allowed call wait time

☒ On ☐ Off

Longest allowed call wait time (minutes)

If exceeded, send notification email to:

After Call Work allow time exceed notification

☒ On ☐ Off

After Call Work maximum allowed time (mins)

If exceeded, send notification email to:

Minimum number of available agents notification

☒ On ☐ Off

Minimum number of available agents

If less, send notification email to:

Rolled Over Not Ready (RONA) notification for Covered CA (RCC) Agents

☒ On ☐ Off

Team name for Roll Over Not Ready trigger

If triggered, send notification email to:

Save

Cancel

Figure 52 Supervisor Email Notification - all notifications enabled

### 2.12.2.7 Supervisor Email Notification – all notifications enabled

1. If all notification options are enabled, the user can enter and/or change all values for all listed notifications.
2. If user presses 'Save', changes are saved.
3. If the user presses 'Cancel' any changes are discarded. The displayed values are reverted back to their original saved values.

### 2.12.2.8 Notification Email Template

When a threshold is exceeded, the system sends a notification email to each listed email address for that metric.

Each email notification template is customizable for each County by the CalSAWS Contact Center operations team.

The emails sent will use the following template:

Email from: [cc.support@calsaws.org](mailto:cc.support@calsaws.org)

Email to: *[list of contact emails for this notification type]*

Subject: Contact Center Supervisor Notification: *[Notification threshold name]*

*This is a system generated email to notify you that [Notification threshold name] was exceed at [date/time].*

*[Additional detail for specific threshold]*

Where applicable, each notification can include an additional line of detail. For example, for the 'Maximum calls in queue' notification, an additional line of detail is included:

*The Maximum Calls in Queue limit is currently 50. Queue name [example-queue-name] currently has 52 calls in queue.*

### 2.12.2.9 Assumptions

1. The supported mechanism for sending the notification is via an email to the configured list of email addresses for each of the configured thresholds. There are no other supported alert mechanisms.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.13 Create/Delete/Edit Team

### 2.13.1 Overview

The Create/Delete/Edit Team page allows an Admin user to create and delete teams (groups of Contact Center Agents and Admins).

Adding and removing Agents to/from teams is performed using the Roll-on/off Agent edit page (not using the Create/Delete/Edit Teams page).

## 2.13.2 Description of Changes

### 2.13.2.1 Create/Delete/Edit Team – No teams defined page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Create/Delete Team

This page allows you to Create, Edit and Delete Teams.

Create Team

Edit Team

Delete Team

There are currently no teams defined. Press 'Create Team' to create a new Team.

Figure 53 Create/Delete Team = no teams defined

### 2.13.2.2 Create/Delete/Edit Team – No teams defined

1. If there are no teams currently defined, a message is displayed “There are currently no teams defined. Press ‘Create Team’ to create a new team”.
2. The ‘Create Team’ button is enabled.
3. The ‘Edit Team’ button is disabled.
4. The ‘Delete Team’ button is disabled.
5. If the user presses the ‘Create Team’ button, the ‘Create New Team’ dialog is displayed. See following section for page mockup and page flow.

### 2.13.2.3 Create/Delete/Edit Team – Teams defined page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Create/Delete Team

This page allows you to Create, Edit and Delete Teams.

Create Team

Edit Team

Delete Team

☐ Team 1

☐ Team 2

☐ Team 3

☐ Team 4

☐ Team 5

☐ Team 6

☐ Team 7

☐ Team 8

☐ Team 9

☐ Team 10

<< Previous | Next >>

Figure 54 Create/Delete Team = teams defined

### 2.13.2.4 Create/Delete/Edit Team – Teams defined

1. Teams currently defined are listed on the page, up to 10 at a time.
2. The maximum number of teams per County is 250.
3. If there are more than 10 teams to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
4. If the user is on the first page, the "<< Previous" link is disabled.
5. If the user is on the last page, the "Next >>" link is disabled.
6. If there are teams to show before and after the current page of Teams, both links are enabled.

### 2.13.2.5 Create/Delete/Edit Team – Create Team page mockup

**Contact Center Admin**

**Create/Delete Team**

This page allows you to Create, Edit and Delete Teams.

**Create Team** **Edit Team** **Delete Team**

- ☐ Team 1
- ☐ Team 2
- ☐ Team 3
- ☐ Team 4
- ☐ Team 5

**Create New Team**

Team Name

**Save** **Cancel**

**Sidebar:**

- Emergency Open / Close
- Emergency Message
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Supervisor email notification
- Queue Hold Messages
- Informational Message
- Roll on/off / Update Agent
- Create/Delete Team**
- Quick Connects
- Hours of Operation

Figure 55 Create/Delete Team - Create New Team

### 2.13.2.6 Create/Delete/Edit Team – Create Team

1. User can add new teams up to a maximum of 250 per County.
2. If there are less than 250 teams defined for the current County and the user presses the 'Create Team' button, the Create New Team dialog is displayed,
3. User enters name for the new team, up to 60 alphanumeric characters.
4. If user presses the 'Save' button, the new team is created. The Create New Team dialog closes, and the displayed list of teams is updated to display the new team.
5. If the user pressed the 'Cancel' button, the Create New Team dialog is closed and no action is taken.

### 2.13.2.7 Create/Delete/Edit Team – Edit Team page mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Create/Delete Team

This page allows you to Create and Delete Teams.

Create TeamEdit TeamDelete Team

☐ Team 1

☒ Team 2

☐ Team 3

☐ Team 4

☐ Team 5

### Edit Team

Team Name:

SaveCancel

Figure 56 Create/Edit/Delete Team - Edit Team page

### 2.13.2.8 Create/Delete/Edit Team – Edit Team

1. If the user selects a team from the displayed list of teams and presses the 'Edit Team' button, the 'Edit Team' dialog is displayed.
2. The user can edit and change the current name for this team.
3. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
4. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

### 2.13.2.9 Create/Delete/Edit Team – Delete Team page mockup

**Contact Center Admin**

**Create/Delete Team**

This page allows you to Create and Delete Teams.

[Create Team](#) [Edit Team](#) [Delete Team](#)

☐ Team 1  
☒ Team 2  
☐ Team 3  
☐ Team 4  
☐ Team 5

**Delete Team?**

Team Name:

Do you want to delete this team? To confirm, press the 'Delete' button. To cancel, press the 'Cancel' button.

[Delete](#) [Cancel](#)

**Sidebar:**

- Emergency Open / Close
- Emergency Message
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Supervisor email notification
- Queue Hold Messages
- Informational Message
- Roll on/off / Update Agent
- Create/Delete Team**
- Quick Connects
- Hours of Operation

Figure 57 Create/Delete Team - Delete Team

### 2.13.2.10 Create/Delete/Edit Team – Delete Team

1. User selects a team to delete by pressing the radio button next to the team, and presses the 'Delete Team' button. The Delete Team dialog is displayed.
2. The Delete Team dialog asks the user to confirm deletion of the selected team.
3. If the user presses 'Delete':
  - a. The team is deleted. The dialog closes and the displayed team list is updated to remove the deleted team.
  - b. County staff that were assigned to the team are unassigned from the deleted team.
4. Deleting a team is permanent. To add back a team, the Admin user creates a new team following the page flow in section 2.13.2.6.

## 2.14 Quick Connects

### 2.14.1 Overview

The Quick Connects page allows the Admin user to maintain the list of available Quick Connects for their County.

To use a Quick Connect, it must be associated with a queue. This page also allows the user to assign and remove Quick Connects from one or more queues.

### 2.14.2 Description of Changes

Add a new panel to the Administration page that allows the Admin user to list, add, edit and delete available Quick Connects.

#### 2.14.2.1 Quick Connects – no Quick Connects defined mockup

**Contact Center Admin**

|                               |   |
|-------------------------------|---|
| Emergency Open / Close        | <h2>Quick Connects</h2> <p>This page allows you to Add, Edit and Delete your Quick Connects.</p> <p><input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/></p> <p>There are currently no Quick Connects defined. Press 'Add' to create a new Quick Connect.</p> |
| Emergency Message             |   |
| Courtesy Callback             |   |
| Scheduled Callback            |   |
| Queue Limits                  |   |
| After Call Work               |   |
| Supervisor email notification |   |
| Queue Hold Messages           |   |
| Informational Message         |   |
| Roll on/off / Update Agent    |   |
| Create/Delete Team            |   |
| <b>Quick Connects</b>         |   |
| Hours of Operation            |   |

Figure 58 Quick Connects: No connects defined mockup

#### 2.14.2.2 Quick Connects – No Quick Connects defined

1. If there are no Quick Connects currently defined, a message is displayed "There are currently no Quick Connects defined. Press 'Add' to create a new Quick Connect".
2. The 'Add' button is enabled.
3. The 'Edit' button is disabled.
4. The 'Delete' button is disabled.
5. If the user presses the 'Add' button, the 'Add New Quick Connect' dialog is displayed. See following sections for page mockup and page flow.



### 2.14.2.3 Quick Connects – Quick Connects defined mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐

Quick Connect example 1

(111) 111 - 1111

☐

Quick Connect example 2

(222) 111 - 1111

☐

Quick Connect example 3

(333) 111 - 1111

☐

Quick Connect example 4

(444) 111 - 1111

☐

Quick Connect example 5

(555) 111 - 1111

☐

Quick Connect example 6

(666) 111 - 1111

☐

Quick Connect example 7

(777) 111 - 1111

☐

Quick Connect example 8

(888) 111 - 1111

☐

Quick Connect example 9

(999) 111 - 1111

☐

Quick Connect example 10

(101) 111 - 1111

<< Previous | Next >>

Figure 59 Quick Connects: Quick Connects defined mockup

### 2.14.2.4 Quick Connects – Quick Connects defined

1. Currently defined Quick Connects are listed on the page, up to 10 at a time.
2. Quick Connects are displayed in alphabetical ascending order by the Name.
3. The maximum number of Quick Connects per County is 100.
4. If there are more than 10 Quick Connects to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
5. If the user is on the first page, the "<< Previous" link is disabled.
6. If the user is on the last page, the "Next >>" link is disabled.
7. If there are Quick Connects to show before and after the current page of Teams, both links are enabled.

### 2.14.2.5 Quick Connects – add new Quick Connect mockup showing Quick Connect type

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐ Quick Connect example 1

(111) 111 - 1111

☐ Quick Connect example 2

(222) 111 - 1111

☐ Quick Connect example 3

(333) 111 - 1111

☐ Quick Connect example 4

(444) 111 - 1111

☐ Quick Connect example 5

(555) 111 - 1111

### Add New Quick Connect

Name

Example new Connect 6

Type

External

Phone

Queue

Assign to new queue

Agent

Assigned queues

None

Save

Cancel

Figure 60 Quick Connects: Add new Quick Connect type dropdown menu

### 2.14.2.6 Quick Connects – add new Quick Connect - External type mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐ Quick Connect example 1

(111) 111 - 1111

☐ Quick Connect example 2

(222) 111 - 1111

☐ Quick Connect example 3

(333) 111 - 1111

☐ Quick Connect example 4

(444) 111 - 1111

☐ Quick Connect example 5

(555) 111 - 1111

### Add New Quick Connect

Name

Example new Connect 6

Type

External

Phone

(666) 666 - 6666

Assign to new queue

Queue 2

Assigned queues

None

Save

Cancel

Figure 61 Quick Connects: Add new Quick Connect - External type

### 2.14.2.7 Quick Connects – add new Quick Connect - Queue type mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐ Quick Connect example 1

(111) 111 - 1111

☐ Quick Connect example 2

(222) 111 - 1111

☐ Quick Connect example 3

(333) 111 - 1111

☐ Quick Connect example 4

(444) 111 - 1111

☐ Quick Connect example 5

(555) 111 - 1111

### Add New Quick Connect

Name

Example new Connect 6

Type

Queue

Queue Name

Example queue 1

Assign to new queue

Queue 2

Assigned queues

None

Save

Cancel

Figure 62 Quick Connects: Add new Quick Connect - Queue type

### 2.14.2.7 Quick Connects – add new Quick Connect - Agent type mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐ Quick Connect example 1

(111) 111 - 1111

☐ Quick Connect example 2

(222) 111 - 1111

☐ Quick Connect example 3

(333) 111 - 1111

☐ Quick Connect example 4

(444) 111 - 1111

☐ Quick Connect example 5

(555) 111 - 1111

### Add New Quick Connect

Name

Example new Connect 6

Type

Agent

Agent name

Lastname, Firstname

Assign to new queue

Queue 2

Assigned queues

None

Save

Cancel

Figure 63 Quick Connects: Add new Quick Connect - Agent type

### 2.14.2.8 Quick Connects – add new Quick Connect – assign to new queue mockup

**Contact Center Admin**

**Quick Connects**

This page allows you to Add, Edit and Delete your Quick Connects.

**Add** **Edit** **Delete**

- ☐ Quick Connect example 1 (111) 111 - 1111
- ☐ Quick Connect example 2 (222) 111 - 1111
- ☐ Quick Connect example 3 (333) 111 - 1111
- ☐ Quick Connect example 4 (444) 111 - 1111
- ☐ Quick Connect example 5 (555) 111 - 1111

**Add New Quick Connect**

Name:

Type:

Phone:

Assign to new queue:

Assigned queues:  4

**Save** **Cancel**

Figure 64 Quick Connects - assign to new queue mockup

### 2.14.2.9 Quick Connects – add new Quick Connect

1. User can add new Quick Connects up to a maximum of 100 per County.
2. If there are less than 100 Quick Connects defined for the current County and the user presses the 'Add' button, the Add New Quick Connect dialog is displayed.
3. User enters name for the new Quick Connect, up to 60 alphanumeric characters.
4. There are 3 types of Quick Connect that can be defined. The Admin user selects the Quick Connect type with the 'Type' dropdown that shows the 3 options:
  - a. External: to transfer a caller to another phone number
  - b. Agent: to call another Agent within the Contact Center
  - c. Queue: to transfer the caller to a specific queue.
5. If the user selects 'External' type, the following input options are displayed (shown in Figure 61)
  - a. Phone – the phone number to transfer the caller to

- b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
- 6. If the user selects 'Queue' type, the following input options are displayed (shown in Figure 62)
  - a. Queue Name – the Queue Name callers are transferred to when this Quick Connect is used
  - b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
- 7. If the user selects 'Agent' type, the following input options are displayed (shown in Figure 63)
  - a. Agent Name – the Agent the caller is transferred to when this Quick Connect is used
  - b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
- 8. The 'Assign to new Queue' field is a searchable dropdown list. The displayed list of queues is filtered by the characters typed into the field. For example, if the user types 'A' the displayed list is updated to list Queue Names beginning with 'A'.
- 9. When a Queue Name is selected from the list it is displayed in the list of associated queue names underneath the field.
- 10. If user presses the 'Save' button, the new Quick Connect is created. The Add New Quick Connect dialog closes, and the displayed list of Quick Connects is updated to display the newly added Quick Connect.
- 11. If the user pressed the 'Cancel' button, the Add New Quick Connect dialog is closed and no action is taken.

Each Quick Connect must be assigned to a queue. When Agents using the Enhanced CCP select to transfer a call using a Quick Connect, they are shown a list of Quick Connects assigned to the current queue they are working. Selecting the Quick Connect will then transfer the caller to either the external number, a queue, or another Agent, depending on the Quick Connect type.

### 2.14.2.9 Quick Connects – edit Quick Connect mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐ Quick Connect example 1

(111) 111 - 1111

☐ Quick Connect example 2

(222) 111 - 1111

☐ Quick Connect example 3

(333) 111 - 1111

☐ Quick Connect example 4

(444) 111 - 1111

☐ Quick Connect example 5

(555) 111 - 1111

☐ Quick Connect example 6

(666) 111 - 1111

☒ Quick Connect example 7

(777) 111 - 1111

☐ Quick Connect example 8

(888) 111 - 1111

☐ Quick Connect example 9

(999) 111 - 1111

☐ Quick Connect example 10

(101) 111 - 1111

<< Previous | Next >>

### Edit Quick Connect

Name

Quick Connect example 7

Type

External

Phone

(777) 777 - 7777

Assign to new queue

Queue 2

Assigned queues

Queue 1

X

Save

Cancel

Figure 65 Quick Connects: Edit Quick Connect mockup

### 2.14.2.11 Quick Connects – edit Quick Connect

1. If the user selects a Quick Connect from the displayed list of Quick Connects and presses the 'Edit' button, the 'Edit Quick Connect' dialog is displayed.
2. The user can edit and change the current name and the Quick Connect type. If the Quick Connect type is changed, the displayed fields are updated to display the relevant fields for that type (as described in the Add New Quick Connect section).
3. The user can add and remove the Queues this Quick Connect is assigned to by selecting new Queues from the dropdown. To remove the association with a queue, the user presses the 'X' icon beside the queue name to delete the association to that queue.
4. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
5. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

### 2.14.2.10 Quick Connects – delete Quick Connect mockup

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Quick Connects

This page allows you to Add, Edit and Delete your Quick Connects.

Add

Edit

Delete

☐ Quick Connect example 1

(111) 111 - 1111

☐ Quick Connect example 2

(222) 111 - 1111

☐ Quick Connect example 3

(333) 111 - 1111

☐ Quick Connect example 4

(444) 111 - 1111

☐ Quick Connect example 5

(555) 111 - 1111

☒ Quick Connect example 6

(666) 111 - 1111

☐ Quick Connect example 7

(777) 111 - 1111

☐ Quick Connect example 8

(888) 111 - 1111

☐ Quick Connect example 9

(999) 111 - 1111

☐ Quick Connect example 10

(101) 111 - 1111

<< Previous | Next >>

### Delete Quick Connect?

Name

Example new Connect 6

Type

External

Phone

(666) 111 - 1111

Assigned queues

Queue 1

Do you want to delete this Quick Connect? To confirm, press the 'Delete' button. To cancel, press the 'Cancel' button.

Delete

Cancel

Figure 66 Quick Connects: delete Quick Connect mockup

### 2.14.2.13 Quick Connects – delete Quick Connect

1. User selects a Quick Connect to delete by pressing the radio button next to the name, and presses the 'Delete' button. The Delete Quick Connect dialog is displayed.
2. The Delete Quick Connect dialog asks the user to confirm deletion of the selected Quick Connect.
3. If the user presses 'Delete':
  - a) The Quick Connect is deleted. The dialog closes and the displayed list is updated to remove the deleted Quick Connect.
4. Deleting a Quick Connect is permanent. To add back a Quick Connect, the Admin user can add a new Quick Connect following the page flow in section 2.14.2.6.

### **2.14.3 Assumptions**

1. The maximum number of Quick Connects per County (per AWS Connect instance) is currently limited to a maximum of 100. This is an AWS Connect limitation.
2. This functionality will be enabled for RCC

## **2.15 Display Office Hours**

### **2.15.2 Overview**

This page displays the currently configured Hours of Operation for the current user's County. The page displays four tabs the include times and dates for:

- Contact Center office hours
- Holidays
- RCC office hours
- RCC holidays

### **2.15.3 Description of Changes**

Add a new panel to the Admin Page that displays the currently configured Hours of Operation.

This page is display only; the values cannot be changed.



### 2.15.3.9 Hours of Operation mockup: Office hours

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Hours of Operation

Your Contact Center's Hours of Operation are:

Hours

Holidays

RCC Hours

RCC Holidays

| Day       | Start     | End       |
|-----------|-----------|-----------|
| Sunday    |           |           |
| Monday    | 9 : 00 AM | 5 : 30 PM |
| Tuesday   | 9 : 00 AM | 5 : 30 PM |
| Wednesday | 9 : 00 AM | 5 : 30 PM |
| Thursday  | 9 : 00 AM | 5 : 30 PM |
| Friday    | 9 : 00 AM | 5 : 30 PM |
| Saturday  |           |           |

Figure 67 Hours of Operation mockup

### 2.15.3.10 Hours of Operation

The Hours of Operation panel on the Admin page displays currently configured Hours of Operation for each day of the week.

If the Contact Center is closed for a specific day, the Start and End times are shown as blank.

### 2.15.3.11 Hours of Operation mockup: Holidays

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

Contact Center Admin

Hours of Operation

Your Contact Center's Hours of Operation are:

Hours

Holidays

RCC Hours

RCC Holidays

• Friday, January 1

• Monday, January 18

• Monday, February 15

• Wednesday, March 31

• Monday, May 31

• Monday, July 5

• Monday, September 6

• Thursday, November 11

• Thursday, November 25

• Friday, November 26

• Saturday, December 25

New Year's Day

Martin Luther King Jr. Day

Presidents' Day

Cesar Chavez Day

Memorial Day

Independence Day

Labor Day

Veterans Day

Thanksgiving Day

Day after Thanksgiving

Christmas Day

Figure 68 Hours of Operation: Holidays

### 2.15.3.12 Hours of Operation: Holidays

The holidays tab shows the county holiday dates observed for the current calendar year.

© 2021 CalSAWS. All Rights Reserved.

94

### 2.15.3.13 Hours of Operation mockup: RCC Hours

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Hours of Operation

Your Contact Center's Hours of Operation are:

Hours

Holidays

RCC Hours

RCC Holidays

Non-Open Enrollment:

| Day       | Start   | End     |
|-----------|---------|---------|
| Sunday    |         |         |
| Monday    | 8:00 AM | 5:00 PM |
| Tuesday   | 8:00 AM | 5:00 PM |
| Wednesday | 8:00 AM | 5:00 PM |
| Thursday  | 8:00 AM | 5:00 PM |
| Friday    | 8:00 AM | 5:00 PM |
| Saturday  |         |         |

Open Enrollment:

| Day       | Start   | End     |
|-----------|---------|---------|
| Sunday    |         |         |
| Monday    | 8:00 AM | 5:00 PM |
| Tuesday   | 8:00 AM | 5:00 PM |
| Wednesday | 8:00 AM | 5:00 PM |
| Thursday  | 8:00 AM | 5:00 PM |
| Friday    | 8:00 AM | 5:00 PM |
| Saturday  | 8:00 AM | 5:00 PM |

Figure 69 Hours of Operation: RCC Hours

### 2.15.3.14 Hours of Operation: RCC Hours

The RCC hours tab shows the office hours for Regional Call Centers, for during Open Enrollment and non-Open Enrollment.

### 2.15.3.15 Hours of Operation mockup: RCC Holidays

Emergency Open / Close

Emergency Message

Courtesy Callback

Scheduled Callback

Queue Limits

After Call Work

Supervisor email notification

Queue Hold Messages

Informational Message

Roll on/off / Update Agent

Create/Delete Team

Quick Connects

Hours of Operation

## Hours of Operation

Your Contact Center's Hours of Operation are:

Hours

Holidays

RCC Hours

RCC Holidays

- Friday, January 1
- Monday, January 18
- Monday, February 15
- Wednesday, March 31
- Monday, May 31
- Monday, July 5
- Monday, September 6
- Thursday, November 11
- Thursday, November 25
- Friday, November 26
- Saturday, December 25

- New Year's Day
- Martin Luther King Jr. Day
- Presidents' Day
- Cesar Chavez Day
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day

Figure 70Hours of Operation: RCC Holidays

### 2.15.3.16 Hours of Operation: RCC Holidays

The RCC Holidays tab shows holiday dates for the Regional Call Centers.

## 2.15.4 Assumptions

1. AWS Connect currently only supports APIs to retrieve Hours of Operation but not to update, therefore this page is only display only. Normal Contact Center Operations processes will be used to request a change to the current hours.
2. This page is enabled for RCC

## 2.16 Configuration Change Audit

### 2.16.2 Overview

The Administration pages allow an Admin user to change important configuration options for the Contact Center. Each time any of these features are changed, the changes are logged to an Audit database to ensure there is an audit trail.

This feature is included for each of the Administration page features described in the previous sections.

### 2.16.3 Description of Changes

1. Build a shared service that logs Administration page configuration changes to a single database.
2. Each time a user makes a change, for example, uses the Emergency Open/Close page to perform an Emergency Close or Open, the following fields are logged to the Audit database:
  - a. CalSAWS User Id for user who made the change
  - b. Date/timestamp of change
  - c. Type of Change
  - d. Changed value

Valid combinations of Type of Change and Changed Value are:

| Type of Change        | Changed Value – valid options  | Additional values        |
|-----------------------|--|--------------------------|
| Emergency Open/Close  | Open<br>Close  | None                     |
| Queue Hold Message    | Message added<br>Message deleted<br>Message edited                               | Message id               |
| Courtesy Callback     | Enabled<br>Disabled<br>Minutes changed<br>Time slot range changed                | None                     |
| Scheduled Callback    | Enabled<br>Disabled<br>Time slot added<br>Time slot deleted<br>Callbacks changed | None                     |
| Queue Limits          | Queue length changed   | None                     |
| After Call Work Limit | Limit changed  | None                     |
| Roll-on / Roll-off    | Search performed<br>Agent updated<br>Roll-on agent<br>Roll-off agent             | Search value<br>Agent id |
| Emergency Message     | Message added<br>Message deleted   | Message id               |

|                               |   |                         |
|-------------------------------|---|-------------------------|
|                               | Message edited<br>Current message changed                                     |                         |
| Informational Message         | Message added<br>Message deleted<br>Message edited<br>Current message changed | Message id              |
| Supervisor Email Notification | Notification enabled<br>Notification disabled<br>Notification email changed   | Changed email address   |
| Create/Delete Team            | Create new team<br>Edit team name<br>Delete team                              | Team id                 |
| <b>Quick Connects</b>         | Add new Quick Connection<br>Edit Quick Connect<br>Delete Quick Connect        | Quick Connect id / name |

### 3. SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description  | Attachment                              |
|--------|-----------------|--|---|
| 1      |                 | Contact Center Functional Design Session for Administration Page | Revised CC FDS_Administration Page.docx |
| 2      |                 |  |   |
| 3      |                 |  |   |
| 4      |                 |  |   |

## 4. REQUIREMENTS

---

### 4.14 Project Requirements

| REQ #     | REQUIREMENT TEXT   | How Requirement Met  |
|-----------|--|--|
| 2222      | <p>The CONTRACTOR shall configure the Customer Service Center solution to allow supervisors to configure triggers which send them an email notification when certain supervisor-specified conditions (e.g., ten calls waiting) are met. Supervisor-specified conditions are as follows:</p> <ul style="list-style-type: none"><li>- Number of calls waiting in queue</li><li>- Longest wait time for a call in a queue</li><li>- After Call Work state time limit for an agent</li><li>- Number of agents available to take calls</li><li>- Agent Rolled Over Not Ready (RONA) state</li></ul> <p>This is County configurable through the administration page.</p> | <p>Section 2.12:<br/>Supervisor Email<br/>Notification configuration<br/>through Administration<br/>page</p>   |
| 2284      | <p>The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to request a scheduled callback if calling outside of the counties configured hours of operation or if the max queue limit has been reached in the queue. This is County configurable through the administration page.</p>  | <p>Section 2.6:<br/>Scheduled Callback<br/>configuration through<br/>Administration page</p> <p>Section 2.7:<br/>Queue Limit configuration<br/>through Administration<br/>page</p>   |
| 2169/2291 | <p>The CONTRACTOR shall provide operational configurability, multi-tenant access to Counties for additional support of functionality within CalSAWS. Multi-tenant access is defined in the following:<br/>The Counties will be responsible for the management of the following:</p>  | <p>Agent Routing Profiles:</p> <ul style="list-style-type: none"><li>- Section 2.9: Routing profile is configured for an Agent as part of Roll-on</li></ul> <p>Resource roll-on/roll-off</p> <ul style="list-style-type: none"><li>- Section 2.9</li></ul> |



|      |   |   |
|------|---|---|
|      | <ul style="list-style-type: none"> <li>- Work force management</li> <li>- Agent routing profiles</li> <li>- Use of the reporting solution</li> <li>- Resource roll-on/roll-off</li> <li>- Create/Delete/Edit Teams</li> </ul> <p>CalSAWS will be responsible for the management of the following:</p> <ul style="list-style-type: none"> <li>- IVR changes</li> <li>- Direct database access</li> <li>- IVR build</li> <li>- Adding/removing queues</li> </ul> <p>The Counties and CalSAWS will both have the ability to independently access the following:</p> <ul style="list-style-type: none"> <li>- Emergency closure</li> <li>- Queue hold messages</li> <li>- Office hour changes</li> <li>- Queue limits</li> <li>- After call work time limit</li> <li>- Informational messages</li> <li>- Emergency messages</li> <li>- Supervisor email notifications</li> <li>- Remote closure of the county</li> </ul> <p>Customer Service Center</p> <ul style="list-style-type: none"> <li>- Amazon Quick Connects</li> </ul> | <p>Create/Delete/Edit Teams</p> <ul style="list-style-type: none"> <li>- Section 2.13 Create / Delete Team</li> </ul> <p>Independently access the following:</p> <p>Emergency closure</p> <ul style="list-style-type: none"> <li>- Section 2.3</li> </ul> <p>Queue hold messages</p> <ul style="list-style-type: none"> <li>- Section 2.4</li> </ul> <p>Office hour changes</p> <ul style="list-style-type: none"> <li>- Section 2.15 Administration page</li> </ul> <p>Queue limits</p> <ul style="list-style-type: none"> <li>- Section 2.7</li> </ul> <p>After call work time limit</p> <ul style="list-style-type: none"> <li>- Section 2.8</li> </ul> <p>Informational messages</p> <ul style="list-style-type: none"> <li>- Section 2.11</li> </ul> <p>Emergency messages</p> <ul style="list-style-type: none"> <li>- Section 2.10</li> </ul> <p>Supervisor email notifications</p> <ul style="list-style-type: none"> <li>- Section 2.12</li> </ul> <p>Remote closure of the county</p> <ul style="list-style-type: none"> <li>- Section 2.3</li> </ul> <p>Amazon Quick Connects</p> <ul style="list-style-type: none"> <li>- Section 2.14 Administration page</li> </ul> |
| 2687 | The CONTRACTOR shall configure the CalSAWS Application to have a Customer Service Center Administration Page. This page will  | Sections 2.1.2.2 – 2.1.2.4: Administration page Security  |

|      |   |  |
|------|---|--|
|      | have a separate security right associated to it. There is one level of security permissions to the administration page.   |  |
| 2688 | <p>The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to roll on and roll off Customer Service Center workers and change the following fields of a Customer Service Center worker:</p> <ul style="list-style-type: none"> <li>- First Name</li> <li>- Last Name</li> <li>- County Email Address</li> <li>- Windows Login ID</li> <li>- Team</li> <li>- Role</li> </ul>   | Section 2.9:<br>Roll-on/off / Update Agent through Administration page |
| 2689 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to close and open due to an emergency.  | Section 2.3:<br>Emergency Closure through Administration page          |
| 2690 | <p>The CONTRACTOR shall configure a call center administration page within CalSAWS to give call center staff members the ability to insert their own custom queue hold messages (messages that are played to the customer as they wait in a queue to speak with an agent) into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved and played. The following languages will be supported through this functionality:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> </ul> | Custom Queue Hold Messages<br>- Section 2.4                            |

|      |  |   |
|------|--|---|
|      | <ul style="list-style-type: none"> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul>                    |   |
| 2691 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the hours that Courtesy Call Back is offered to the customer.  | Section 2.5:<br>Courtesy Callback configuration through Administration page     |
| 2692 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the number of minutes a customer needs to wait in queue before Courtesy Call Back is offered to the customer.                  | Section 2.5:<br>Courtesy Callback configuration through Administration page     |
| 2693 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to adjust the limit on the number of calls allowed per queue at the Customer Service Center. Different queues can have different limits. | Section 2.7:<br>Queue Limits configuration through Administration page          |
| 2694 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center  | Section 2.8:<br>After Call Work Limit configuration through Administration page |

|      |  |  |
|------|--|--|
|      | staff members the ability to control the amount of time an agent can be in the "After Call Work" state after ending a call before being automatically put back in to the "Ready" state to receive a new call.  |  |
| 2695 | <p>The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom emergency message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul> <p>This message plays when the customer selects to speak to a worker during normal operating hours and the Customer Service Center is closed.</p> | Section 2.10:<br>Emergency Message configuration through Administration page |

|      |   |  |
|------|---|--|
| 2696 | <p>The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom informational message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul> <p>This message plays after language selection in the IVR.</p> | <p>Section 2.11:<br/>Informational Message configuration through Administration page</p> |
|------|---|--|

## 5. APPENDIX

---

### 5.14 Emergency Open/Close Status – Data Model

| Data element             | Type   | Example values      |
|--------------------------|--------|---------------------|
| County Code              | Number | 19                  |
| Emergency Closure Status | String | Open, Closed        |
| Last Update              | Date   | 2021-03-01T09:00:00 |

### 5.15 Queue Hold Message Data Model

| Data Element Name | Type    | Example Values                      |
|-------------------|---------|-------------------------------------|
| countyId          | Integer | 19                                  |
| messageId         | Integer | 1 ... 10                            |
| messageName       | String  | Name of the message                 |
| messageText       | String  | The text for the Queue Hold message |

### 5.16 Courtesy Callback Data Model

| Data Element Name       | Type    | Example Value |
|-------------------------|---------|---------------|
| countyId                | Integer | 19            |
| courtesyCallbackEnabled | Boolean | True   false  |

### 5.17 Courtesy Callback Configuration Data Model

| Data Element Name            | Type    | Example Value |
|------------------------------|---------|---------------|
| countyId                     | Integer | 19            |
| minutesBeforeCallbackOffered | Integer | 30            |
| mondayStartTime              | String  | 09:00:00      |
| mondayEndTime                | String  | 17:00:00      |
| tuesdayStartTime             | String  | 09:00:00      |
| tuesdayEndTime               | String  | 17:00:00      |
| wednesdayStartTime           | String  | 09:00:00      |
| wednesdayEndTime             | String  | 17:00:00      |
| thursdayStartTime            | String  | 09:00:00      |

|                 |        |          |
|-----------------|--------|----------|
| thursdayEndTime | String | 17:00:00 |
| fridayStartTime | String | 09:00:00 |
| fridayEndTime   | String | 12:00:00 |