

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-226844 | Enhanced Customer Control Panel

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Create Enhanced CCP with CalSAWS Identify Provider Integration.....	5
	2.1.1 Overview .....	5
	2.1.2 Description of Changes .....	5
	2.2 Add Enhanced CCP to CalSAWS Application Navigation .....	6
	2.2.1 Overview .....	6
	2.2.2 Description of Change.....	6
	2.3 Customize Enhanced CCP .....	8
	2.3.1 Overview .....	8
	2.3.2 Description of Changes .....	8
	2.4 Configure Call Panel.....	19
	2.4.1 Overview .....	19
	2.4.2 Description of Change.....	19
	2.5 Enable CalSAWS Screen Pop .....	23
	2.5.1 Overview .....	23
	2.5.2 Description of Change.....	23
	2.6 Enable Downloading CCP Logs for Troubleshooting .....	24
	2.6.1 Overview .....	24
	2.6.2 Description of Changes .....	24
3	Supporting Documents .....	24
4	Requirements.....	25
	4.1 Project Requirements.....	25
5	Appendix.....	25

# 1 OVERVIEW

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## 1.1 Current Design

CalSAWS/C-IV Contact Center Agents currently use two applications, the Default Customer Control Panel (CCP) which is a web-based application with limited functionality, and the Custom CCP which is a desktop client application. Both applications allow Contact Center Agents to accept inbound voice calls, place outbound voice calls, and conduct web chats with customers.

## 1.2 Requests

1. Replace the current Default CCP and Custom CCP applications with a single web-based solution which enables agents to access the application from either a County Office or remote location.
2. Combine features of both applications, the Default CCP and Custom CCP, into one single application.
3. Add a 'Call Control Panel' link in the CalSAWS Application that opens the CCP application for the user.

## 1.3 Overview of Recommendations

1. Create Enhanced CCP with CalSAWS Identify Provider Integration for the CalSAWS Contact Center Solution
2. Add Enhanced CCP to CalSAWS Application Navigation
3. Customize Enhanced CCP
  - a. Dashboard
  - b. Caller Profile
  - c. Agent Profile
  - d. Supervisor View
  - e. Live Chat (Web Chat)
  - f. Queue Statistics/Team Performance
  - g. Useful Links
  - h. Administration page
4. Configure Call Panel in Enhanced CCP
5. Enable CalSAWS Screen Pop for Incoming Calls
6. Enable downloading of CCP Logs for Troubleshooting issues

## 1.4 Assumptions

1. Agents will not be able to handle webchat calls if the county has not opted-into this feature.
2. Agents/workers will not have access to Supervisor features in the Enhanced CCP. Only staff rolled on as a Supervisor will see these features.
3. Quick Links will be defined at individual county sessions.
4. The Enhanced CCP has a minimum required internet bandwidth of 2 Mbps to support Supervisor features such as screen recording and call monitoring. Other core features such as placing and receiving calls require less bandwidth. It is assumed Agents using the Enhanced CCP while working from home have the minimum required bandwidth available to support all features.
5. The Enhanced CCP web application is only supported using the latest three versions of Google Chrome or Mozilla Firefox browsers.

## **2 RECOMMENDATIONS**

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### **2.1 Create Enhanced CCP with CalSAWS Identify Provider Integration**

#### **2.1.1 Overview**

Enable the Enhanced CCP application to allow agents and supervisors in the CalSAWS Contact Center Solution to handle calls and view statistics. The Enhanced CCP will be integrated with the CalSAWS Identify Provider.

#### **2.1.2 Description of Changes**

Integrate the Enhanced CCP application with the CalSAWS Identity Provider to enable single-sign on (SSO). Create Enhanced CCP that is accessible from CalSAWS Application (See section 2.2) and designated URL.

##### **2.1.2.1 Single Sign On**

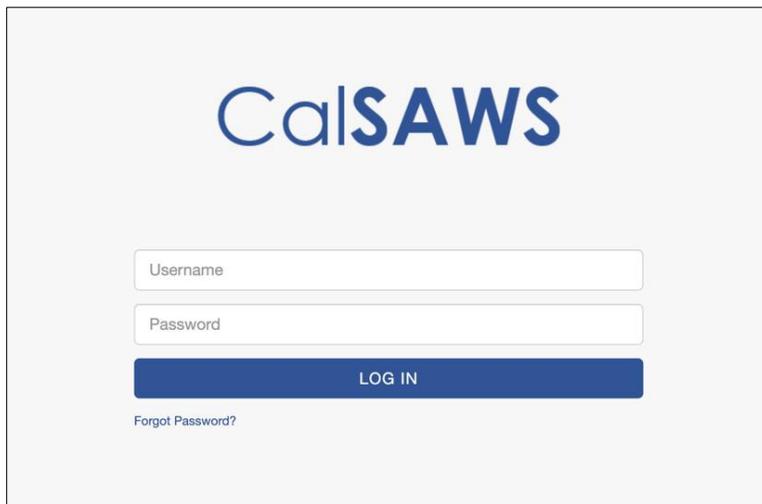
To access the Enhanced CCP application, the user must have one of the following roles assigned in the CalSAWS Application:

- CCP Agent
- CCP Supervisor

Users access the Enhanced CCP via the designated URL in their web browser or link in the CalSAWS Application (see section 2.2).

1. If the user has already logged on to the CalSAWS Application and their logon session is still active, they are redirected directly to the Enhanced CCP application and are not prompted to logon again.
2. If the user's logon session has expired or if the user is not currently logged on, they are redirected to the logon page which is provided by the CalSAWS Identity Provider. The user will enter in their CalSAWS credentials to continue. Login Screen Mockup.

#### 2.1.2.1.1 Figure - Login Screen



If the user clicks the 'Logout' button at the top right of the Enhanced CCP, the user's current session is invalidated and the user is redirected to the CalSAWS login page.

## 2.2 Add Enhanced CCP to CalSAWS Application Navigation

### 2.2.1 Overview

A 'Call Control Panel' link will be added in the CalSAWS Application to open the Enhanced CCP in a new window.

### 2.2.2 Description of Change

1. Add a 'Call Control Panel' link under Admin Tool – Global navigation, and Office Admin – Task navigation.
2. The 'Call Control Panel' link will be displayed directly under the Call Log link in the Task Navigation.
3. Call Control Panel window will be displayed for the user who has CCP Agent security right. CCP Agent is an existing security right.

4. Upon clicking on 'Call Control Panel' link, Call Control Panel pop up window will be displayed.

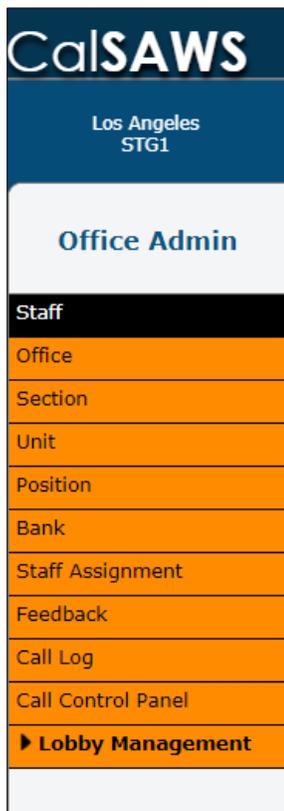
Technical Note: Call Control Panel pop up window configured:

- Height = Screen Height
- Width = Screen Width
- Scrollable = Yes
- Sizeable = Yes

### 2.2.2.1 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Call Control Panel

#### 2.2.2.1.1 Figure - Task Navigation



### 2.2.2.2 Security Updates

N/A

## 2.3 Customize Enhanced CCP

### 2.3.1 Overview

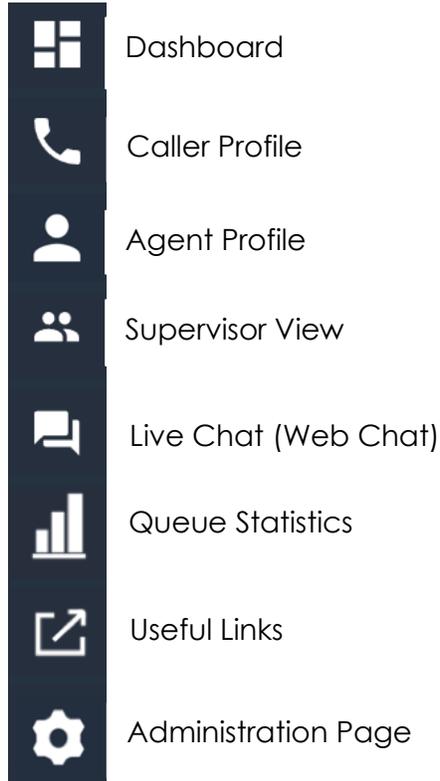
The Enhanced CCP is a web-based application that enables contact center agents and supervisors to complete the core functions in a contact center, including handling incoming calls, setting agents/user status, initiating outbound calls and transferring calls.

### 2.3.2 Description of Changes

Customize the base Enhanced CCP to enable the following pages/menu items.

1. **Dashboard** – Allows the user to view historical statistics for past voice calls.
2. **Caller Profile** – Displays information about the current caller to assist the Agent when working with the current customer.
3. **Agent Profile** – Displays current statistics for the Agent. The page also allows the Agent to compare their Statistics over time.
4. **Supervisor View** – Allows a Supervisor user to view and manage Agents.
5. **Live Chat (Web Chat)** – Allows the Agent to interact with a customer using text chat.
6. **Queue Statistics** – Displays Statistics for the currently defined queues.
7. **Useful Links** – Provides county specific links for agents to access.

### 2.3.2.1 Figure - Enhanced CCP Navigation Menu



*Note: Admin page will be added in SCR CA-226627*

### 2.3.2.2 Create Dashboard page

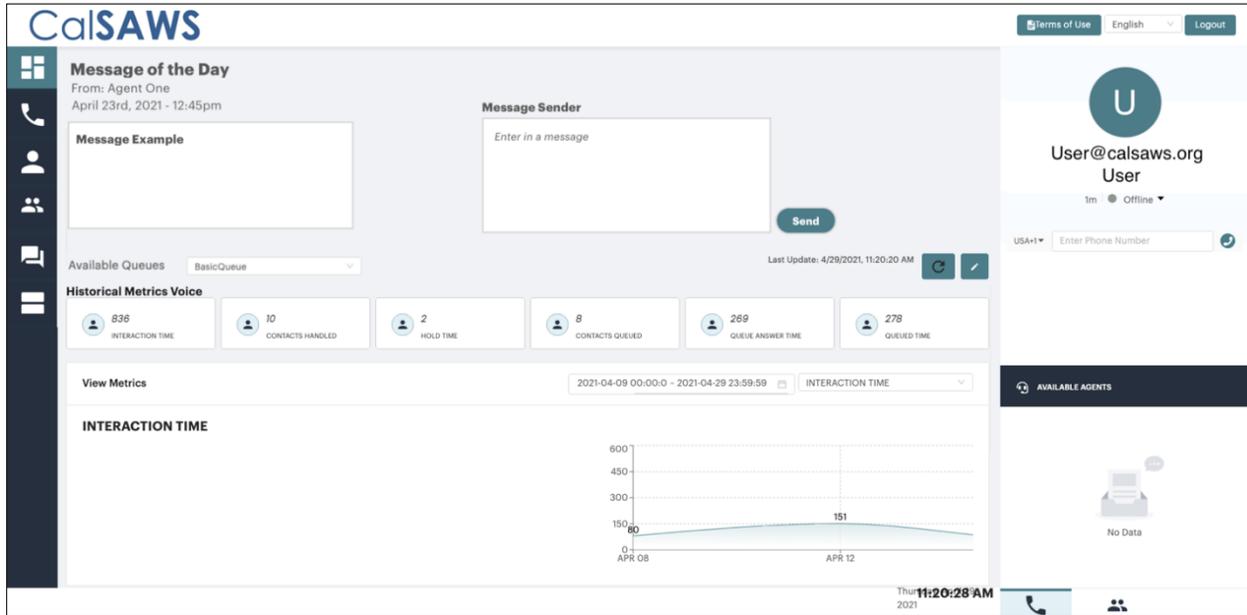
Add a page to the Enhanced CCP application that displays historical call statistics for a selected queue and Message of the Day functionality.

The Message of the Day feature allows Supervisors to send a message to their Agents and for Agents to view the messages from their supervisors.

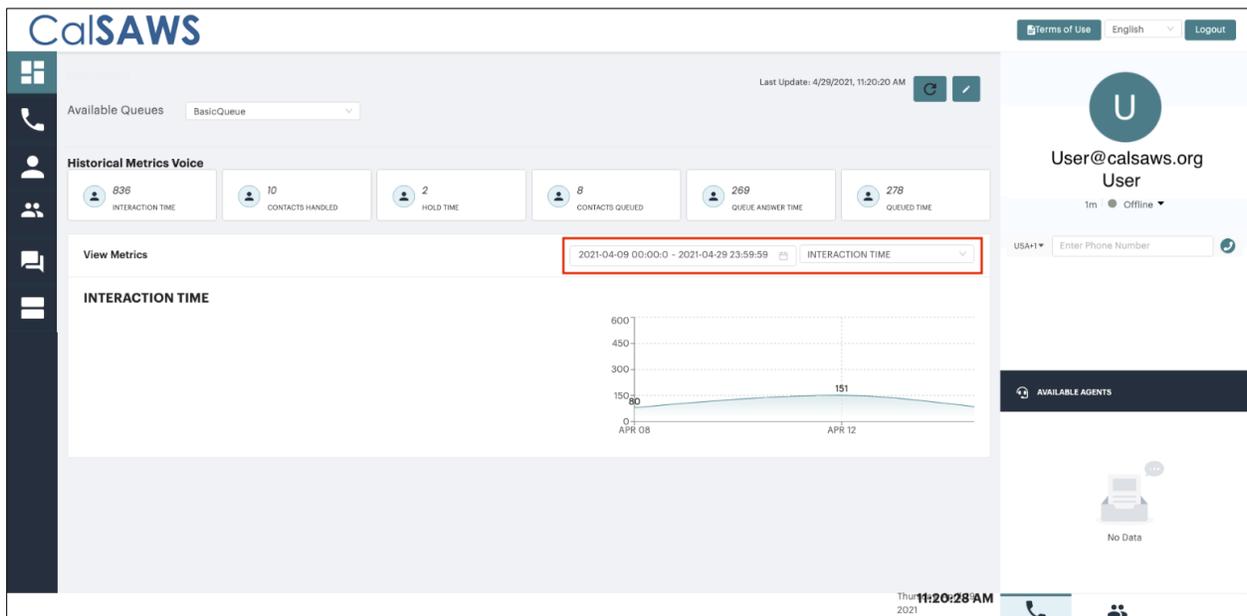
1. User clicks on 'Dashboard' menu item in the main navigation bar, historical metrics for queues is displayed.
2. At the top left of the Dashboard page the 'Message of the Day' panel is displayed. The panel includes who the message is from and the time and date the message was sent.
3. In the 'Message Sender' field at the top right, the user enters text into the field then clicks the 'Send' button, to send the message of the day to the Agents. Note: Only users with CCP Supervisor role will have access to 'Message Sender' field.
4. Historical Voice Statistics are displayed below the Message of the Day.

- Below the Historical Statistics, the user can choose a date range and data type to display a graph of the selected metric over time. See highlighted section in Figure 2.3.2.2.

### 2.3.2.2.1 Figure – Dashboard page



### 2.3.2.2.2 Figure – Dashboard page Date Range



### 2.3.2.3 Create Caller Profile page

Add a page to the Enhanced CCP that displays caller information and buttons for the user to select and perform an action.

1. User clicks on 'Caller Profile' menu item in main navigation bar or accepts an inbound call, the Caller Profile page is displayed. The left of the page displays the callers contact information.
2. In the center of the Caller Profile Page, a Real-Time Transcript of the voice call is displayed which the user can turn off or on. The transcript is automatically updated during the call and displays a text record of both the caller and the Agent.
3. If the user accepts an incoming call, the In-Progress Call Banner Page is displayed on the right. The name of the caller and their phone number is displayed.
4. Below the phone number the name of the current queue and call duration is displayed.
5. At the bottom of the page, buttons are displayed to allow the Agent to perform an action on the current call.

#### 2.3.2.3.1 Figure - Caller Profile page - Call In-Progress

The screenshot displays the CalSAWS interface for a 'Caller Profile' page during an active call. The page is divided into several sections:

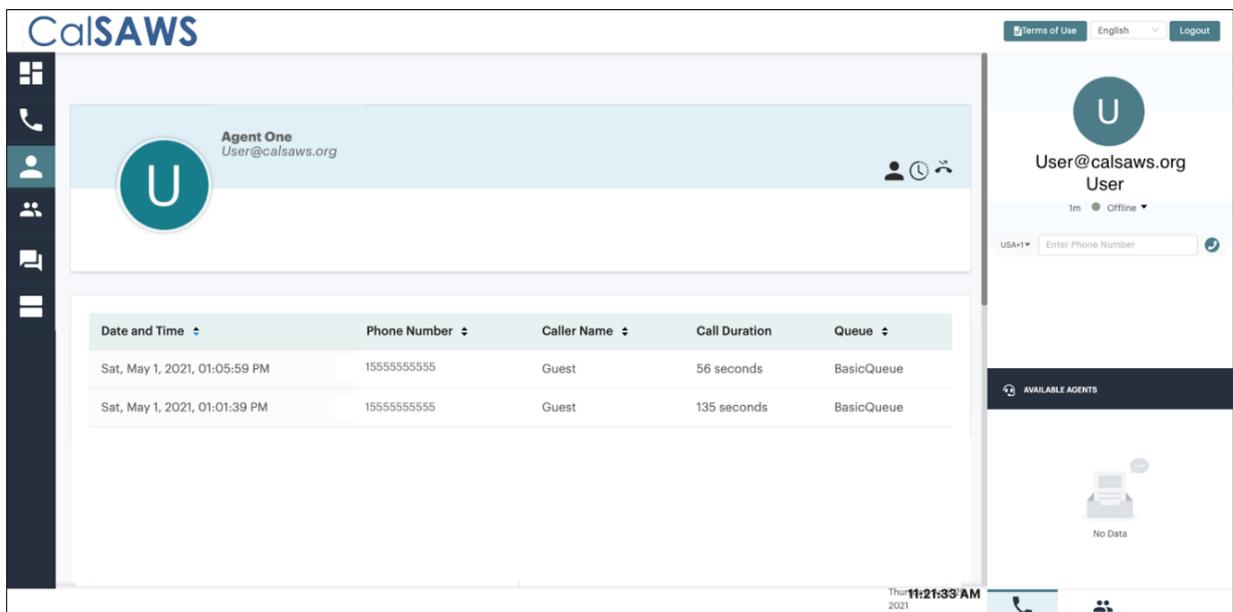
- Header:** Includes the CalSAWS logo, 'Terms of Use', 'English' language selector, and 'Logout' button.
- Navigation:** A sidebar on the left contains icons for home, call, profile, and other functions.
- Contact Information:** A form on the left side for entering details such as First Name, Last Name, Email Address, Phone Number, and Location. Below this, it shows 'Case #: 1234567', 'Customer Name: Customer one', 'Language: EN', and 'Call Reason: CF\_Other\_Benefits\_Question'.
- Call Analysis:** A central section with a 'Real-Time Transcript' toggle (currently on) and a transcript showing 'Hello.' at 12:01 PM and 'Mhm.' at 12:01 PM. A 'Ticket #: INC0001098' is also visible.
- Caller Profile Summary:** On the right, it shows a 'Guest' profile with phone number '+19566394391' and 'Caller Intent: BasicQueue' with a duration of '00:02:41'. Below this are icons for microphone, mute, end call, and other actions.
- Footer:** Displays 'AVAILABLE AGENTS' and 'No Data'.
- System Status:** At the bottom right, it shows the time '12:01:55 PM' and date 'Tuesday, May 4, 2021'.

### 2.3.2.4 Create Agent Profile page

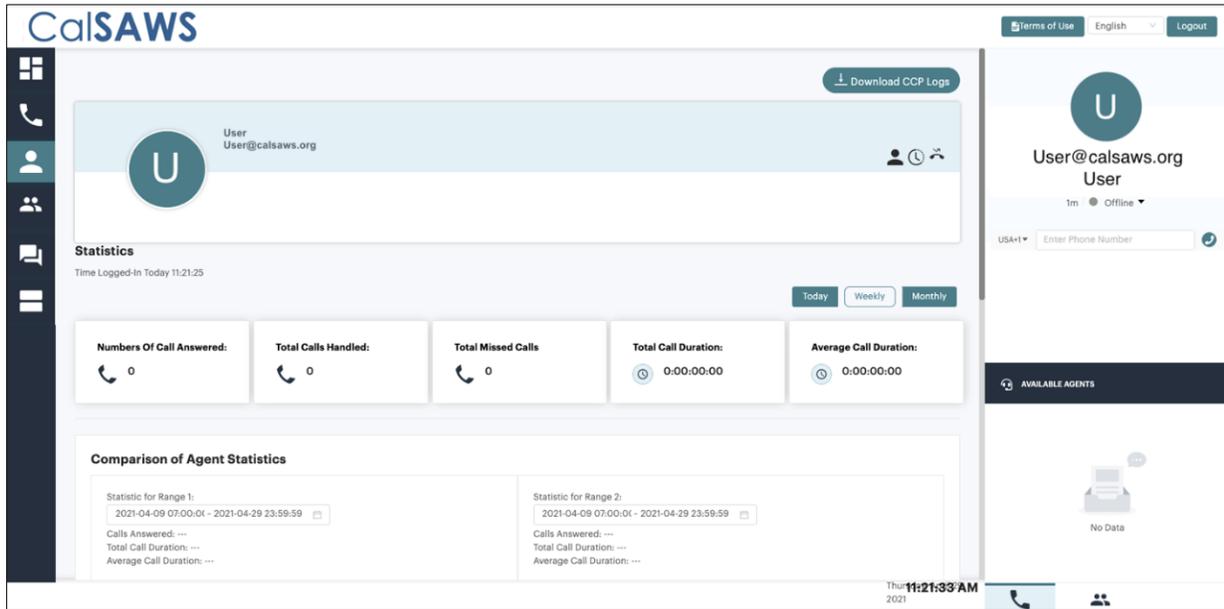
Add a page to the Enhanced CCP application to display the Agent's information, Call History and statistics.

1. User clicks on the 'Agent Profile' menu item in the navigation bar, the Agent Profile page is displayed.
2. Users information is displayed at the top of the page including name and email address.
3. Users call statistics are displayed under the users information showing the Number of Call Answered, Total Calls Handled, Total Missed Calls, Total Call Duration, and Average Call Duration.
4. Users can click 'Today', 'Weekly', and 'Monthly' view of their call statistics.
5. Below statistics, users can see their 'Comparison of Agent Statistics' by selecting a time and date range to compare their call statistics over time.
6. Call History information about previous calls and can display up to three years of log history.

#### 2.3.2.4.1 Figure – Agent Profile page – Call History



#### 2.3.2.4.2 Figure – Agent Profile page – Agent Statistics



### 2.3.2.5 Create Supervisor View page

The Supervisor View page allows a Supervisor user to view and manage agents and view missed calls. The page allows the Supervisor to change the Routing Profile, turn on/off the 'auto answer' feature, and change the phone type for each Agent.

This menu item is only available to users with the CCP Supervisor role assigned.

Supervisors can listen to agent's voice conversation in real-time, see list of agents by team, current status of each agent, change an Agent's availability status, and send messages to Agent.

Add a page to the Enhanced CCP application for supervisors to view and manage agents in a selected team. Team viewed is selected using the 'select team' drop down.

The page lists the following buttons on the page to perform actions on a selected Agent:

- **Start Monitoring:** allows the Supervisor to listen to the current call of the selected agent.
- **Ready:** A supervisor can change the state of the selected agent to "Ready". This button will be disabled unless the selected agent is in the "After Call Work" state or any of the "Error" or "Not Ready" states.
- **Not Ready:** This button will be disabled when the selected agent is in a "Not Ready" state. Change the state of the selected agent to "Not Ready – Supervisor Initiated."

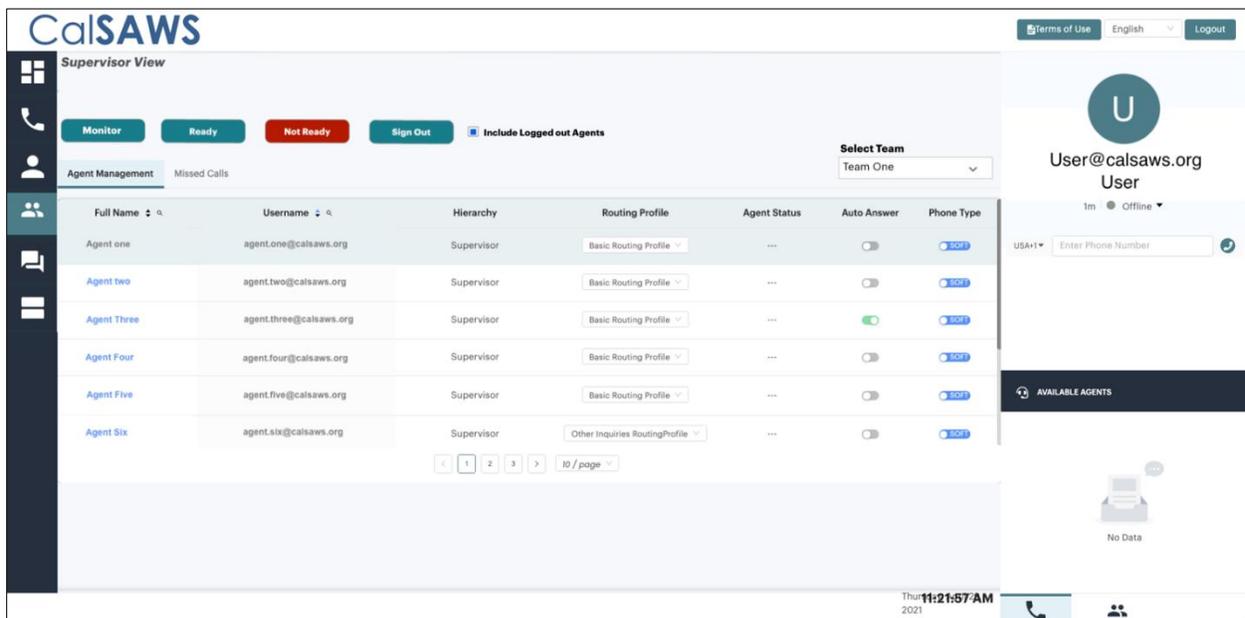
- Sign Out: Log out the selected user, changing them to the Logged Out/Offline state. This button will be disabled if the selected agent is in the Logged Out/Offline state.

A filter is displayed in the Agent list panel, 'Include logged out agents' to display logged out agents.

1. User clicks on the 'Supervisor View' menu item in the navigation bar, the Supervisor View page is then displayed.
2. Tabs are available to view and manage agents/teams.
  - Agent Management tab for a list of agent information.
  - Missed Call tab for list of missed calls
  - Team Performance Tab for view of team statistics

At the bottom of the Agent Management page, users click on the left, right or numbered toggle button to move between pages.

### 2.3.2.5.1 Figure - Supervisor View page



### 2.3.2.5.2 Agent Management

Under the Agent Management tab in the Supervisor View menu item the following features are available:

1. View Agent Information
2. Update Agent Routing Profile
3. Change Agent Status
4. Turn Auto Answer On/Off for Agent
5. Change Phone Type

6. Call In-Progress Monitoring
7. Sign Agent Out
8. Daily Agent Statistics

### 2.3.2.5.2.1 Figure - Supervisor View – Change Agent Status

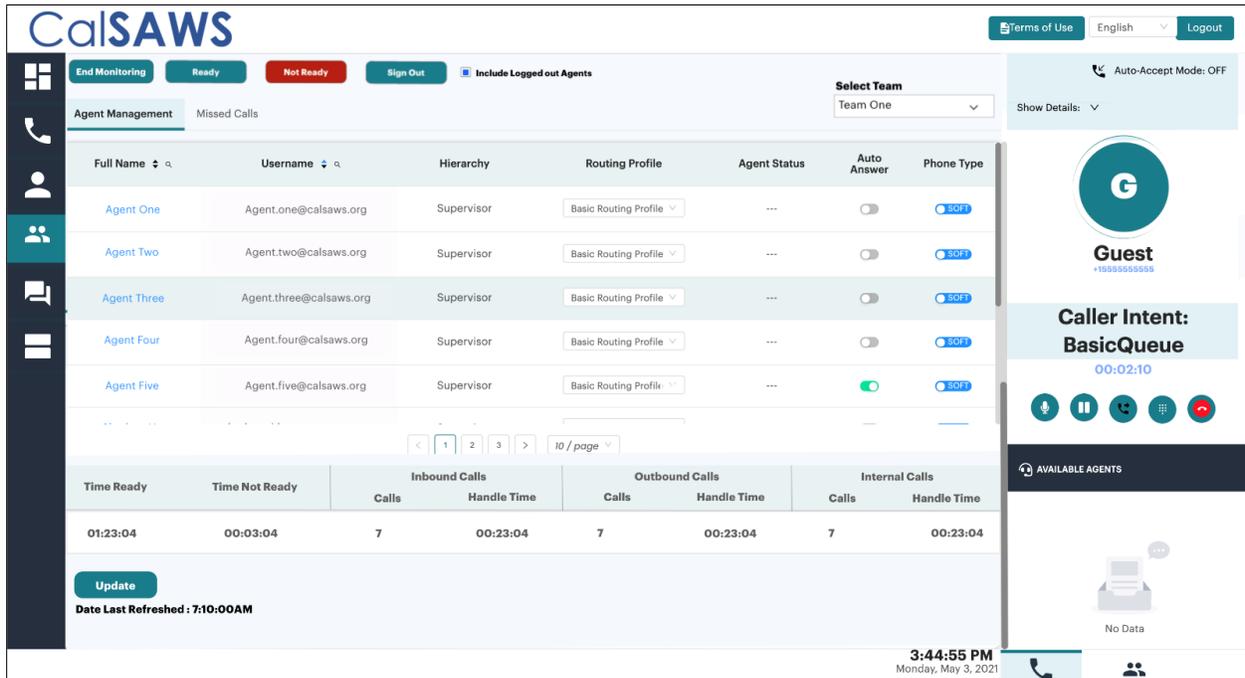
The screenshot shows the CalSAWS Supervisor View interface. At the top, there are buttons for 'Monitor', 'Ready', 'Not Ready', and 'Sign Out', along with an 'Include Logged out Agents' checkbox. Below these are tabs for 'Agent Management' and 'Missed Calls'. A table lists agents with columns for Full Name, Username, Hierarchy, Routing Profile, Agent Status, Auto Answer, and Phone Type. A dropdown menu for 'Agent Status' is open, showing options: 40m, Available, Available, After Call Work, After Chat Work, Meeting, Break, Lunch, and Offline. The current user is 'User@calsaws.org' and the team is 'Team One'. The time is 11:21:57 AM on Thursday, 2021.

### 2.3.2.5.2.2 Figure - Supervisor View – Call Monitoring

The screenshot shows the CalSAWS Supervisor View interface during call monitoring. At the top, there are buttons for 'End Monitoring', 'Ready', 'Not Ready', and 'Sign Out', along with an 'Include Logged out Agents' checkbox. Below these are tabs for 'Agent Management' and 'Missed Calls'. A table lists agents with columns for Full Name, Username, Hierarchy, Routing Profile, Agent Status, Auto Answer, and Phone Type. The current call information is displayed: Case # 1234567, Customer Name: Customer one, Language: EN, Call Reason: CF\_Other\_Benefits\_Question, Primary: Y, County: 21, IVR Time: 03:06, and Authenticated: Y. The current user is 'Guest' and the team is 'Team One'. The time is 3:44:55 PM on Monday, May 3, 2021.

Note: Current caller information is displayed during monitoring

### 2.3.2.5.2.3 Figure - Supervisor View – Daily Agent Statistics



### 2.3.2.6 Missed Calls

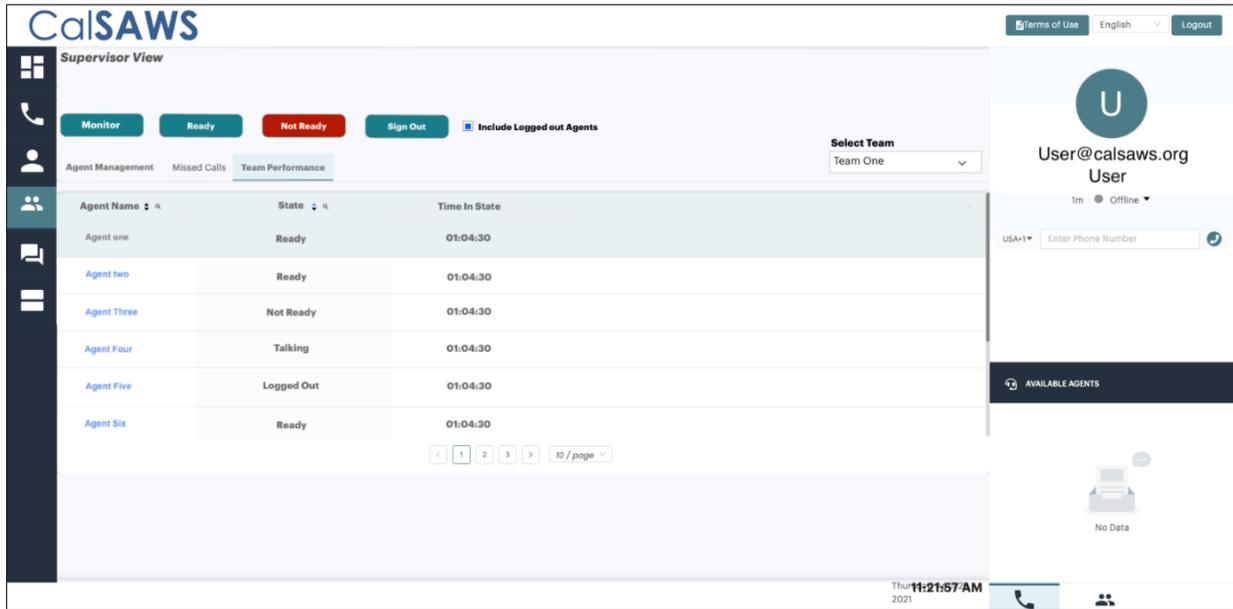
The Missed Calls tab on the Supervisor View page shows inbound calls that were not answered by any Agent. These are inbound calls from a customer where they abandoned the call without talking with an Agent.

### 2.3.2.7 Team Performance

Under the Team performance tab displays a list of currently configured teams on the left and a list of agents in the selected team in the panel on the right including agents name, current state and time in state.

If there are more Agents in the selected team that can be displayed on the page, pagination links are displayed at the bottom of the Agent list panel. Clicking the 'Next' link displays the next page of Agents, clicking the 'Previous' link displays the previous page.

#### 2.3.2.7.1 Figure - Supervisor View – Team Statistics



### 2.3.2.8 Create Live Chat (Web Chat) page

This feature allows the Agent to interact with a customer using text chat if the county has opted into this functionality.

Agents receive an incoming Web Chat request as an incoming call which they can either accept or reject using the call control panel.

Web Chat will be implemented in SCR CA-227063.

### 2.3.2.9 Create Queue Statistics page

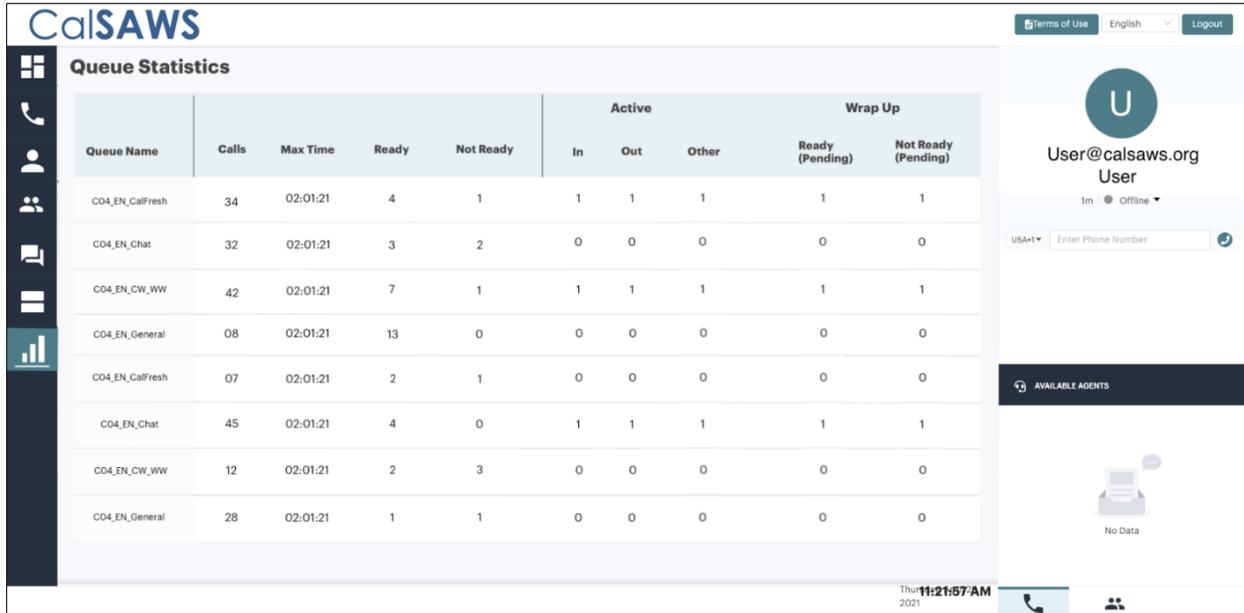
The Queue Statistics page shows Statistics for the currently defined queues. This is a view only, real-time display of current queue statistics.

Add a page to the Enhanced CCP application that displays queue statistics for the currently defined queues for the Supervisor's County.

1. If the user clicks on the Queue Statistics menu item in the main navigation menu, the Queue Statistics page is displayed.
2. The Queue Statistics page shows a list of all queues currently defined for the current County.
3. Each of the statistics columns can be sorted in ascending or descending order by clicking on the column heading. The current sort order if enabled is indicated by an 'up arrow' for ascending order, or 'down arrow' for descending order.
4. If there are more queues for the current County that can be displayed on the page, page navigation links are enabled at the bottom of the page:

- a. If the user presses 'Next' the next page of queues are displayed
- b. If the user presses 'Previous' the previous page of queues are displayed

**2.3.2.9.1 Figure - Queue Statistics**

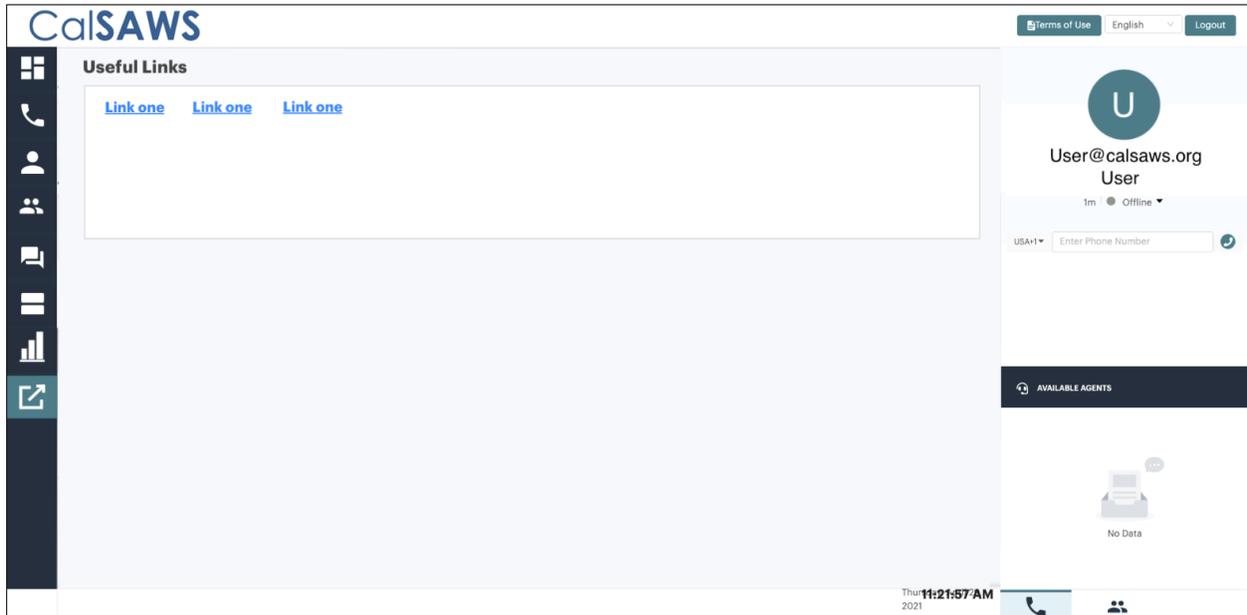


**2.3.2.10 Create Useful Links page**

Clickable links that are displayed for each county in accordance with the county's needs.

Note: These links will be defined by the county in the individual county sessions. This is limited to 10 links.

**2.3.2.10.1 Figure - Useful Links**



## 2.4 Configure Call Panel

### 2.4.1 Overview

On the right side of the Enhanced CCP is the Call Panel. This section of the CCP is used to accept calls and chats, place outgoing calls, update users status, transfer calls and access quick connects.

### 2.4.2 Description of Change

Configure the Call Panel in the Enhanced CCP to allow the following:

1. Call in Progress Banner
2. Initiate Outbound Call
3. Transfer Calls/Quick Connects
4. Add Transfer Note

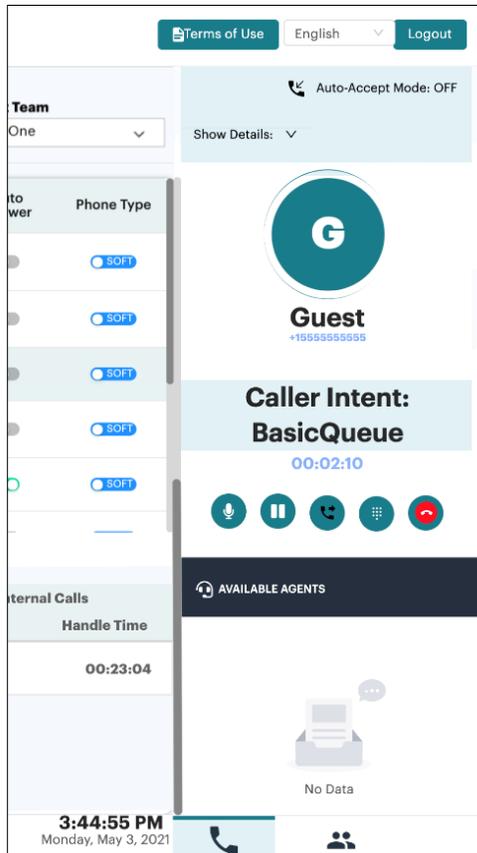
#### 2.4.2.1 In-Progress Call Banner

The In-Progress Call Banner displays information about the current call and provides buttons for the user to perform actions during the call. Both agent and supervisor have this feature. Actions include:

- Mute
- Hold/Pause
- Transfer

- Keypad
- End Call

### 2.4.2.1.1 Figure - In-Progress Call Banner



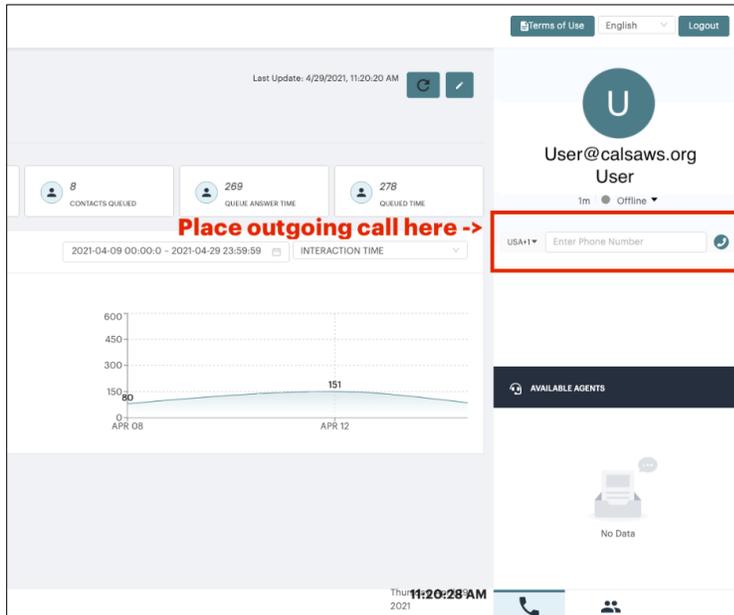
### 2.4.2.2 Initiate Outbound Call

This feature allows users to initiate outbound calls by entering a phone number, then clicking the call button.

Add a panel to the Enhanced CCP application that allows users to place outgoing calls.

1. On the right hand side of the Enhanced CCP, users enter a phone number into the 'Enter Phone Number' field under the users current status.
2. The users click the call button to the right of the 'Enter Phone Number' field to initiate the outgoing call.

#### 2.4.2.2.1 Figure - Outbound Call



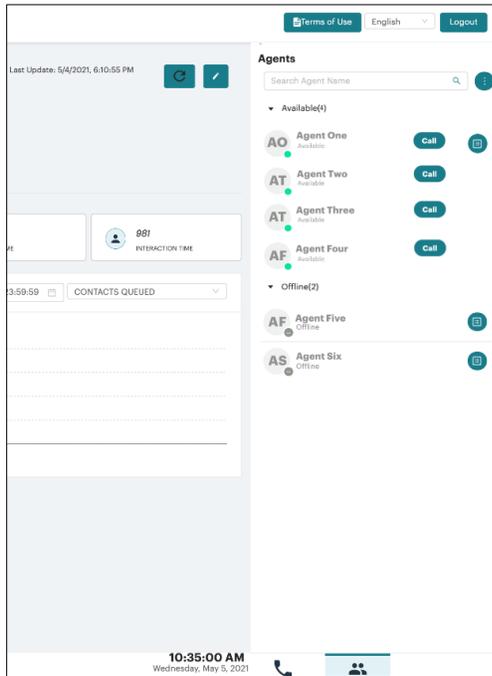
### 2.4.2.3 Transfer Call and Quick Connects

This feature allows user to transfer calls to a selected queue or external phone number. Configuration of the quick connects is available on the Administration page to be included in a separate SCR.

Configure Enhanced CCP to allow users to select queues to transfer current call(s) to.

1. The Quick Connects panel is displayed if the user clicks the 'Quick Connects' icon in the bottom right now the page.
2. The panel displays a list of configured Agents and Queues that are available for the Agent to all.
3. The Agent can place a call to another Agent or Queue by pressing the 'Call' button.

#### 2.4.2.3.1 Figure - Quick Connects

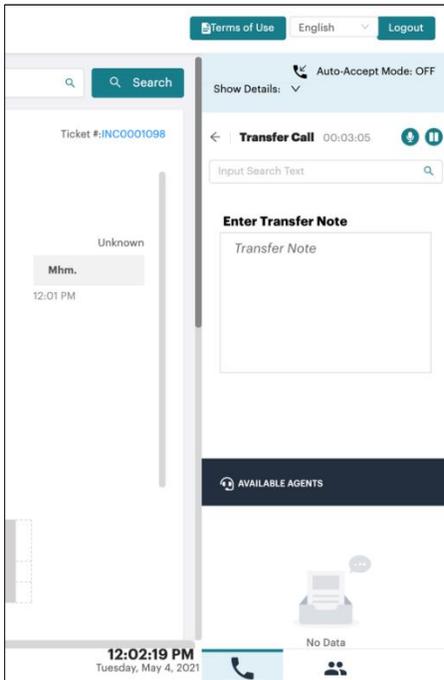


#### 2.4.2.4 Enable Transfer Note for Transferred Calls

The Transfer Note feature allows user to send a message to the agent or supervisor when they transfer a call to a different queue within the Call Center Solution.

Add an input text field to the Enhanced CCP application Call Transfer page to allow user to input text to be displayed for the next Agent or Supervisor.

##### 2.4.2.4.1 Figure - Transfer Note for Transferred Calls



## 2.5 Enable CalSAWS Screen Pop

### 2.5.1 Overview

This functionality enables the CalSAWS system to accept Screen Pop parameters from the Enhanced CCP Application.

### 2.5.2 Description of Change

Enable the Enhanced CCP to pop the CalSAWS Application when an incoming call is received. The screen pop is dependent on the type of caller:

- Authenticated Caller: Case Summary page for authenticated case and Call Log Detail page with auto-populated case information (case number, name, and language)
- Non Authenticated Caller: Person Search page and Call Log Detail page
- Regional Call Center/Quick Sort Transfer Caller: Call Log Detail page with auto-populated Covered California information (Caller's County, Tracker/Tracer ID, and language)

When an agent accepts an incoming call, the Enhanced CCP application displays call details from the Amazon Connect IVR.

This feature is related to SCR CA-215560 to add auto-population logic for the screen pop.

## 2.6 Enable Downloading CCP Logs for Troubleshooting

### 2.6.1 Overview

The Download Logs button allows agents to download their CCP application session logs to share with the contact center support to troubleshoot issues in the CCP. This feature is available to both Agents and Supervisors.

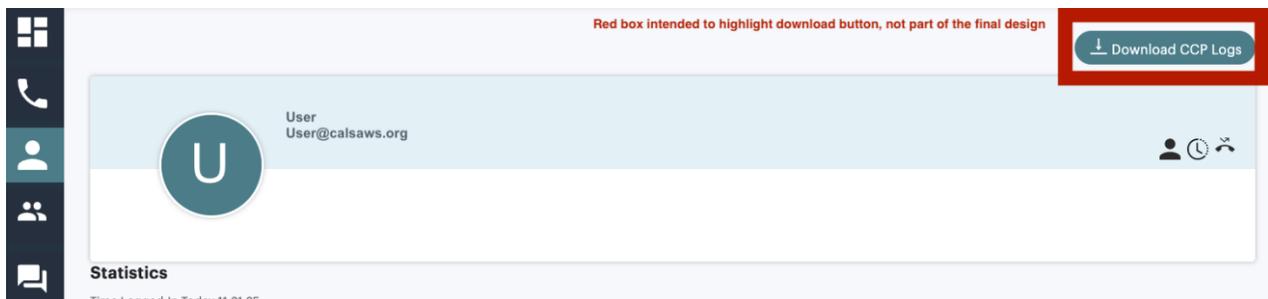
### 2.6.2 Description of Changes

Add a button to allow the user to download their CCP application session logs to help with technical application problems.

1. User clicks on the 'Agent Profile' menu item in the navigation bar, then clicks on the 'Download CCP Logs' button at the top of the page, a text file is downloaded to the user's computer.
2. The file contains technical information about the user's session after they logged into the CCP including error messages, browser information, and Enhanced CCP settings.

Note: Users will be instructed where to send/upload logs in the event of a CCP issue based on their existing support process.

#### 2.6.2.1 Figure - Download CCP Logs button



## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
None			

## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2700	The CONTRACTOR shall configure the Customer Service Center solution to include a Message of the Day functionality which allows County designated staff to send global messages to all staff's CCP.		Section 2.3.2.2

## 5 APPENDIX

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None.