

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-226209: DDID: 2292, 2697, 2698, 2723, 2724,
eGain Analytics, Calabrio One and Amazon
Console

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Stacey Xiong/ Pramod Ramesh
	Reviewed By	

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1 OVERVIEW

1.1 Current Design

eGain Analytics reporting solution is used by contact center supervisors/leads/managers to run and create real-time and historical reports related to call data in the CalSAWS Contact Center Solution.

The Calabrio One solution for Workforce Management (WFM), Quality Assurance (QA), and Quality Management (QM) enables contact center supervisors to plan and create agent work schedules, monitor agent activity, and perform agent evaluations. Agents use this solution to view their schedules, request time-off, and access their call recordings. The reporting capabilities of this solution provide insights into the productivity, effectiveness, and management of agents within the contact center.

In Amazon Connect, data about contacts are captured in contact trace records (CTR). Amazon Connect provides reporting based on Queues, Agents and Routing Profiles and Phone numbers. This data can include the amount of time a contact spends in each state: customer on hold, customer in queue, agent interaction time.

1.2 Requests

Configure Contact Center applications to support WFM, QA/QM and Reporting functions for the additional contact center counties (Los Angeles and CalWIN counties).

1.3 Overview of Recommendations

1. Enable eGain Analytics for Los Angeles and the 18 CalWIN Counties.
 - a. As one of the CalSAWS's Contact Center reporting tools, eGain Analytics includes canned reports in the following categories:
 - Agent Summary
 - Queue Summary
 - Contact Detail
 - Contact Routing Summary
 - Dialed Number Summary
 - Agent State Detail
 - Agent Offline Summary
 - Agent Realtime
 - Queue Realtime

These reports are exportable via Excel, HTML, CSV, PDF

- b. The eGain Analytics solution allows the ability to configure custom reports leveraging the Amazon Connect data available.

2. Enable Calabrio One for Los Angeles and the 18 CalWIN Counties.
 - a. Calabrio One is the Workforce Management and QA/QM solution for the Customer Service Center solution.
 - b. The Calabrio One solution will include recording 100% of the call audio and 25% of the agent desktop screens. The retention period for these recordings will be 90 days. Configure solution to allow Counties to export their audio and video recordings for longer storage.
3. Enable the Amazon Console for additional historical and real-time reporting for Los Angeles and the 18 CalWIN counties to perform the following functions:
 - Configure routing profiles for their agents
 - View Amazon Connects real time and historical agent and queue reports
 - Configure Quick Connects

1.4 Assumptions

1. Calabrio One, eGain Analytics, and the Amazon Console are already enabled for the 14 C-IV County Contact Centers. These will be migrated to CalSAWS as part of CA-207026.
2. This SCR does not change the users experience for the C-IV Counties.
3. Calabrio One, eGain Analytics, and the Amazon Console will be accessible to Los Angeles County and the 18 CalWIN Counties upon individual county go-live dates.
4. CalWIN and Los Angeles County final roll-on details and user counts will be determined at a later phase and loaded prior to County go-live.
5. eGain Analytics:
 - a. Historical call data from Los Angeles County and the 18 CalWIN Counties will not be migrated over from their existing county contact centers.
 - b. eGain Analytics Reporting capability and data quality will be determined by eGain Analytics' synchronization with AWS data.
 - c. Amazon Chat reporting is expected to release by end of June 2021.
 - d. Standard retention period for historical data is 3 years.
 - e. Counties are responsible for maintaining their reports within eGain Analytics.
6. Calabrio One:
 - a. Historical call data from Los Angeles County and the 18 CalWIN Counties will not be migrated over from their existing county contact centers.
 - b. Calabrio will keep their data model synchronized with Amazon.
 - c. Counties are to provide external storage for call reporting export.

2 RECOMMENDATIONS

2.1 Enable Reports in eGain Analytics for Los Angeles and 18 CalWIN Counties

To support the CalSAWS Contact Center counties, eGain Analytics will be enabled for generating reports. Supervisors, Managers, and other contact center staff are granted access through the Roll-On process.

Note: eGain Analytics is not a SSO (Single Sign On) application and will require users to have separate login credentials.

2.1.1 Canned (pre-configured) Report Overview

eGain Analytics has built in canned reports. Reports can be exported using the following formats: Excel, CSV, PDF, HTML. There are a total of 66 canned reports available to the counties that were created from the reporting models or categories shown in figure 2.1.2.

- Daily – 12 Historical reports grouped by date
- Day-on-Day - 12 Historical reports grouped by Agent or Queue
- Intra-day -12 Historical reports displaying half hour intervals
- Detail – 4 Historical reports for Agent and Queue
- Weekly – 12 Historical reports grouped by week
- Monthly – 12 Historical reports grouped by month
- Real-Time metrics – 2 Real-Time reports for Agent and Queue

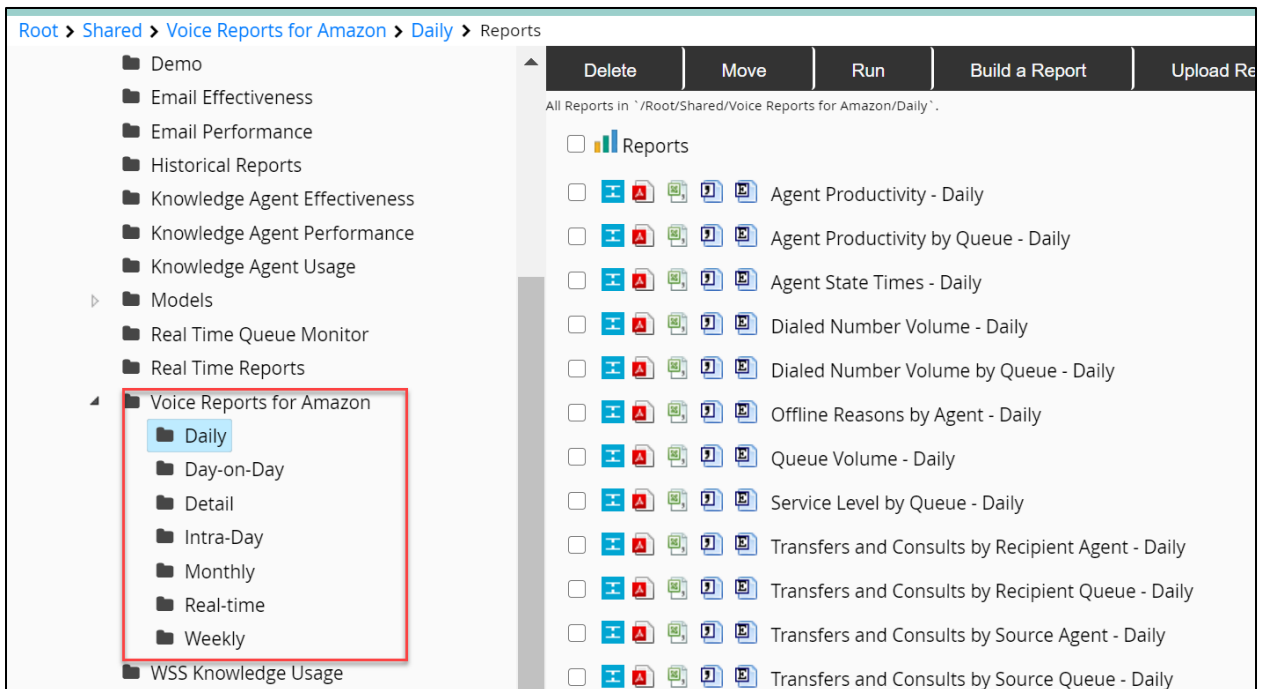


Figure 2.1.1.1 – Canned Reports

2.1.2 Customize Reports Overview

eGain Analytics report builder is a 6-step wizard that allows users to create their own reports. Users can choose how to pull the data, how it is organized, and how it looks. Reports can be run when required or used in a dashboard.

1. Historical report models are indicated by the Blue color.
2. Real-time report models are indicated by the Green symbol.

To enable easier searching, the report models are grouped by type.

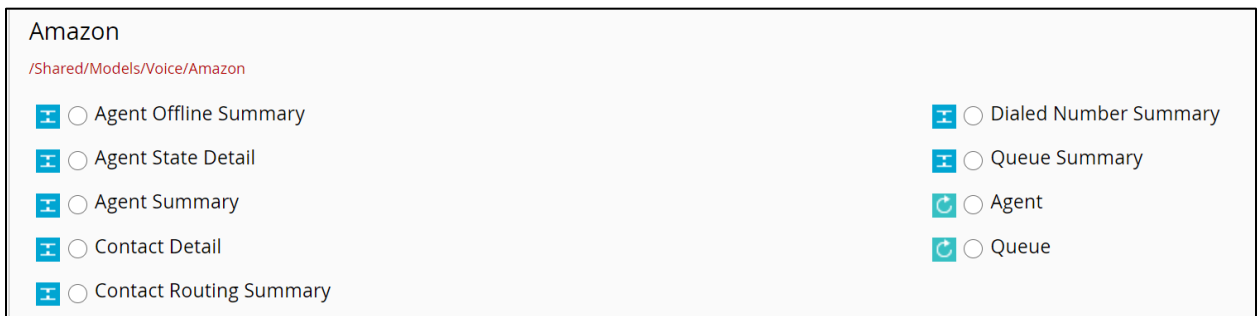


Figure 2.1.2 – Customize Reports

2.2 Enable Calabrio Cloud platform for WFM and QA/QM solution

To support the CalSAWS Contact Center counties, Calabrio One will be enabled for WFM, QA/QM and related reporting. Supervisors and Agents are granted access through the Roll-On process.

Users will access Calabrio One via a URL link using the email address and the password provided during each county setup.

2.2.1 Calabrio Overview

Calabrio Cloud Service is the existing WFM/QA/QM solution that is integrated with Amazon Connect and deployed for C-IV Counties. This solution will be scaled across Los Angeles and the 18 CalWIN Counties.

- Administrator(s) will configure ACD for each County in Calabrio One. Data is segregated by Counties.
- Administrator(s) will configure Login/Logout, Service Historical, Agent Productivity, and Agent Productivity by Queue reports in Amazon Connect.
- Administrator(s) will add County to Workflow for recording retention and configuration

The screenshot shows the 'Workflow Administration' interface. At the top, it says 'Match Any of following the conditions.' Below this, there are two conditions listed in a table-like structure:

Condition	Operator	Value
Call Direction	Equals	Inbound
Call Direction	Equals	Outbound

Below the conditions, there is an 'Actions' section. It contains two sets of actions, one for voice recordings and one for matching screen recordings. Each set includes:

- Keep 100 % of Random voice recordings.
- Immediate Upload 9:00 PM
- Convert on Upload
- Retention Policy: Quality Retention - C-IV Quality

The second set of actions is identical but for 'matching screen recordings' with a 'Keep 25' setting.

Figure 2.2.1 – Calabrio Retention

2.2.2 Call Recording Configuration, Retention and Export

The Calabrio One solution will be configured with the following:

1. The Calabrio One solution will include recording 100% of the call audio and 25% of the agent desktop screens.
2. The retention period for recordings will be 90 days.
3. Configure solution to enable Counties to export their audio recordings prior to the 90-day expiration.

During individual County discussion, Calabrio One will be configured to allow bulk export of call recordings to be sent to local County storage location which will be determined at a later date.

2.3 Amazon Connect Reporting

To support the CalSAWS Contact Center counties, the Amazon Console will be enabled for additional historical and real-time reporting access. Supervisors and Agents are granted access through the Roll-On process. By default, supervisors will have access to view/create the historical/real-time reports.

Staff will use the CalSAWS's identity provider to login to the console.

Note: Additional Amazon Console features will be enabled in future SCRs.

3 SUPPORTING DOCUMENTS

[NOTE: do not attach/embed files into the design doc, list here by filename only. The files will be attached to the Jira ticket alongside this design doc]

Number	Functional Area	Description	Attachment
1	eGain	eGain Semantic Model	egain17_Fall2019_analytics_amazonconnect_semantic_models.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2292	The CONTRACTOR shall configure the Customer Service Center solution to give the county the ability to configure their own reports leveraging the Amazon Connect data that is available.	2.1.2
2698	The CONTRACTOR shall configure the Customer Service Center solution to include recording 100% of the call audio and 25% of the agent desktop screens. The retention period for these recordings will be 90 days. The CONTRACTOR shall configure an API for Counties to export their audio recordings prior to the 90-day expiration.	2.2.2
2697	The CONTRACTOR shall configure the Customer Service Center solution to allow County designated staff Amazon Console access for the following: <ul style="list-style-type: none"> - Configure routing profiles for their agents - View Amazon Connects real time and historical agent and queue reports - Configure Quick Connects 	2.3 for 2 nd bullet. Note: Additional SCRs will be created to address remaining items in the requirement.
2723	The CONTRACTOR shall configure the Customer Service Center solution to include up to 10 canned reports that meet the reporting needs for the Counties, which includes the following categories: <ul style="list-style-type: none"> - Agent Summary - Queue Summary - Contact Detail - Contact Routing Summary 	2.1.2

	<ul style="list-style-type: none"> - Dialed Number Summary - Agent State Detail - Agent Offline Summary - Agent Realtime - Queue Realtime <p>The CONTRACTOR shall configure these reports to be exportable via excel.</p>	
2724	The CONTRACTOR shall include a Work Force Management and reporting solution as part of the Customer Service Center solution.	2.2 and 2.3