

Evaluate for Amazon Connect

Deployment Guide

March 2018

Qualtrak Solutions Ltd

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This Deployment guide was created by *Qualtrak Solutions Ltd.*

Overview

This deployment guide provides step-by-step instructions for deploying **Evaluate for Amazon Connect** on the Amazon Web Services (AWS) Cloud.

This deployment guide is for IT infrastructure architects, administrators, and DevOps professionals who are planning to implement whom want a Quality Monitoring solution for their Amazon Connect deployment in the AWS Cloud.

Evaluate for Amazon Connect on AWS

Evaluate for Amazon Connect by **Qualtrak Solutions** is a high standard agent evaluation (**Quality Monitoring**) and **online learning** solution that will help you to develop the skills of your agents and achieve the required standards in customer service, customer loyalty, brand values adherence, cross and up-selling, first call resolution, optimum call handling time and much more. It is easy and intuitive to use.

Evaluate is seamlessly integrated directly to the **Amazon Connect** call recording service and uses the Contact Trace Records (CTR) to enable supervisors to find calls that contain the appropriate ‘situations’ which match precisely the agent’s personal performance improvement needs e.g. how well did the agent transfer the customer’s call to another agent; if the customer was placed on hold, did the agent return to the customer if the hold-time was greater than x seconds and apologize; if the call resulted in the agent placing the customer on hold more than y times, was this caused by the agent failing to gain an understanding of the customer’s needs and causing the length of the call to be longer than it needed to be, etc. For the supervisor to be able to coach their agents on personal needs, it requires the right calls to be found (using CTRs) which contain the appropriate ‘situations’. Evaluate does not require the use of a third-party call recorder and therefore avoids additional costs.

Typically, the cost of agents equates to around 55% of the total contact center costs. Being able to manage effectively the performance of agents and be able to maximize both the productivity and quality of customer interactions, requires a robust **Quality Management program** to be implemented which continuously measures agent performance, identifies individual improvement needs and delivers to the agents appropriate online learning/coaching. Evaluate provides supervisors and managers with the required tools to support their Quality program.

Evaluate for Amazon Connect delivers significant value by including the following **key benefits**:

- rate the quality of calls against defined standards and create performance metrics
- track the performance of agents and benchmark agent and team performance
- create ‘evaluation templates’ which include the required skills and knowledge to meet critical standards e.g. regulatory compliance, cross and up-selling and much more
- include weightings for each evaluation element (questions) in order to produce headline scores
- include ‘auto-fail’ and calibration of supervisors’ evaluation consistency and objectivity
- provide agent coaching feedback comments, supportive call segments and learning attachments to each individual question in order that evaluated calls can also provide continuous online learning
- use the available easy to use/preformatted reports to track performance and set goals

Evaluate for Amazon Connect is a multi-tenanted solution designed to be used by customers with both single and multiple locations (of all sizes) using a common active directory. The solution is designed to be used by every type of user including supervisors, agents, homeworkers, branch network employees, quality and compliance auditors, trainers and managers/senior executives.

Amazon Connect system integrators/consulting partners and OEM vendors with cloud-based solutions including Collections, Inside Sales, Performance Management, Compliance: **Qualtrak** will be interested to discuss joint opportunities to create innovative/disruptive synergistic solutions, using **Evaluate for Amazon Connect**, that will enhance customer value. We are currently developing new solutions integrated with **Amazon Connect: Automated Quality Management and personalized bite-sized online agent coaching**. These will provide additional and exciting opportunities for joint initiatives.

Costs and Licenses

You are responsible for the cost of the AWS services used while running this deployment guide. There is no additional cost for using the deployment guide.

The AWS CloudFormation template for this deployment guide includes configuration parameters that you can customize. Some of these settings, such as instance type, will affect the cost of deployment. For cost estimates, see the pricing pages for each AWS service you will be using. Prices are subject to change.

Each deployment gets a 30 days free trial. During this period, the customer will not be charged for the **Evaluate for Amazon Connect** software but will be charged for the use of the AWS services. After the 30 day free trial the customer will be charged in accordance with the listing price.

Architecture

Deploying this for a new virtual private cloud (VPC) with **default parameters** builds the following **Evaluate for Amazon Connect** environment in the AWS Cloud.

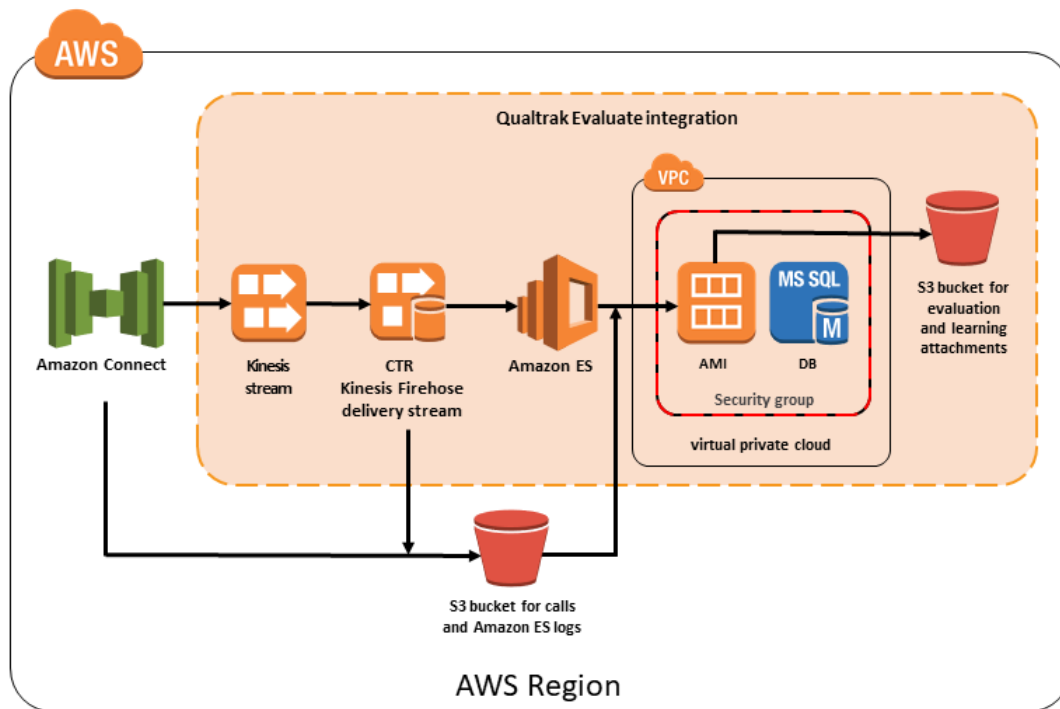


Figure 1: Evaluate for Amazon Connect architecture on AWS

Prerequisites

Specialized Knowledge

Before you deploy this, we recommend that you become familiar with the following AWS services. (If you are new to AWS, see [Getting Started with AWS](#).)

- [Amazon VPC](#)
- [Amazon EC2](#)
- [Amazon S3](#)
- [Amazon EBS](#)
- [Amazon ElasticSearch](#)
- [Amazon Kinesis](#)
- [Amazon RDS](#)

Technical Requirements

Before deploying **Evaluate for Amazon Connect**, you must have the following:

- An AWS account.

- An Amazon EC2 key pair.
- (Optional) An SSL certificate managed by AWS Certificate Manager in the region where you are deploying Evaluate for Amazon Connect. Please contact Qualtrak Support at <http://www.qualtrak.com/support> for assistance in setting up Evaluate for Amazon Connect with SSL/TLS.

Deployment Options

This provides two deployment options:

- **Deploy Evaluate for Amazon Connect into a new VPC** (end-to-end deployment). This option builds a new AWS environment consisting of the VPC, subnets, NAT gateways, security groups, bastion hosts, and other infrastructure components, and then deploys **Evaluate for Amazon Connect** and **Data Streaming** into this new VPC.
- **Deploy Evaluate for Amazon Connect with Data Streaming into an existing VPC**. This option provisions **Evaluate for Amazon Connect** and **Data Streaming** in your existing AWS infrastructure.
- **Deploy Evaluate for Amazon Connect without Data Streaming into an existing VPC**. This option provisions **Evaluate for Amazon Connect** in your existing AWS infrastructure.
- This deployment guide provides separate templates for these options. It also lets you configure CIDR blocks, instance types, and **Evaluate for Amazon Connect** settings, as discussed later in this guide.

Deployment Steps

Step 1. Prepare Your AWS Account

1. If you don't already have an AWS account, create one at <https://aws.amazon.com> by following the on-screen instructions.
2. Use the region selector in the navigation bar to choose the AWS Region where you want to deploy **Evaluate for Amazon Connect** on AWS.
3. Create a [key pair](#) in your preferred region.
4. If necessary, [request a service limit increase](#) for the Amazon EC2 m4.large instance type. You might need to do this if you already have an existing deployment that uses this

instance type, and you think you might exceed the [default limit](#) with this reference deployment.

Step 2. Subscribe to the Evaluate for Amazon Connect AMI

1. Log in to the AWS Marketplace at <https://aws.amazon.com/marketplace>.
2. Open the page for **Evaluate for Amazon Connect**, and choose **Continue**.
3. Use the **Manual Launch** option to launch the AMI into your account on Amazon EC2. This involves accepting the terms of the license agreement and receiving confirmation email. For detailed instructions, see the [AWS Marketplace documentation](#).

Step 3. Launch the CFT (CloudFormation Template)

Note You are responsible for the cost of the AWS services used while running this deployment guide. There is no additional cost for using this CFT. For full details, see the pricing pages for each AWS service you will be using in this CFT. Prices are subject to change.

1. Choose one of the following options to launch the AWS CloudFormation template into your AWS account. For help choosing an option, see [deployment options](#) earlier in this guide.

| | | |
|--|--|--|
| <p>Option 1 Deploy Evaluate for Amazon Connect into a</p> <p>Launch</p> <p>new VPC on AWS</p> | <p>Option 2 Deploy Evaluate for Amazon Connect with Data Streaming</p> <p>Launch</p> <p>into an existing VPC on AWS</p> | <p>Option 3 Deploy Evaluate for Amazon Connect into an existing VPC on</p> <p>Launch</p> <p>AWS</p> |
|--|--|--|

- **Important** If you're deploying **Evaluate for Amazon Connect** into an existing VPC, make sure that your VPC has two private subnets in different Availability Zones for the database instances. These subnets require NAT gateways or NAT instances in their route tables, to allow the instances to download packages and software without exposing them to the Internet. You'll also need the domain name option configured in the DHCP options as explained in the [Amazon VPC documentation](#). You'll be prompted for your VPC settings when you launch the CFT.

Each deployment takes about 30 minutes to complete.

2. Check the region that's displayed in the upper-right corner of the navigation bar, and change it if necessary. This is where the network infrastructure for **Evaluate for Amazon Connect** will be built. The template is launched in the US East (Virginia) Region by default.
3. On the **Select Template** page, keep the default setting for the template URL, and then choose **Next**.
4. On the **Specify Details** page, change the stack name if needed. Review the parameters for the template. Provide values for the parameters that require input. For all other parameters, review the default settings and customize them as necessary. When you finish reviewing and customizing the parameters, choose **Next**.

In the following tables, parameters are listed by category and described separately for the two deployment options:

- [Parameters for deploying Evaluate for Amazon Connect into a new VPC](#)
- [Parameters for deploying Evaluate for Amazon Connect with Data Streaming into an existing VPC](#)
- [Parameters for deploying Evaluate for Amazon Connect without Data Streaming into an existing VPC](#)
- **Option 1: Parameters for deploying Evaluate for Amazon Connect into a new VPC**

This option will create a new VPC, deploy the [Data Streaming](#) stack and **Evaluate for Amazon Connect**.

[View template](#)

Amazon VPC Configuration:

| Parameter label (name) | Default | Description |
|--|-----------------------|---|
| Availability Zones (AvailabilityZones) | <i>Requires input</i> | The list of Availability Zones to use for the subnets in the VPC. The Quick Start uses two Availability Zones from your list and preserves the logical order you specify. |
| VPC CIDR (VPCCIDR) | 10.0.0.0/16 | CIDR block for the VPC. |
| Private Subnet 1 CIDR (PrivateSubnet1CIDR) | 10.0.0.0/19 | CIDR block for the private subnet located in Availability Zone 1. |

| Parameter label (name) | Default | Description |
|--|-----------------------|---|
| Private Subnet 2 CIDR (PrivateSubnet2CIDR) | 10.0.32.0/19 | CIDR block for the private subnet located in Availability Zone 2. |
| Public Subnet 1 CIDR (PublicSubnet1CIDR) | 10.0.128.0/20 | CIDR block for the public (DMZ) subnet located in Availability Zone 1. |
| Public Subnet 2 CIDR (PublicSubnet2CIDR) | 10.0.144.0/20 | CIDR block for the public (DMZ) subnet located in Availability Zone 2. |
| Key Name (KeyPairName) | <i>Requires input</i> | Select the name of an existing public/private key pair. Please go to the EC2 console and create a key pair if you do not have one |

Amazon Redshift Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| Database Name (DatabaseName) | acctr | Provide a name for your database or accept the default |
| Master User Name (MasterUserName) | <i>Requires input</i> | Provide a name for the database administrator account or accept the default |
| Master User Password (MasterUserPassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |
| Database Port (MasterUserName) | 5439 | Provide a database port or accept the default |

Amazon EC2 Configuration:

| Parameter label (name) | Default | Description |
|--|-----------------------|--|
| Instance Type (InstanceType) | m4.large | Amazon EC2 instance type |
| RDP From (RDPFrom) | <i>Requires input</i> | Lockdown RDP access to EC2 instance from valid IPv4 address, e.g. 201.0.1.3/19 |

Amazon RDS Configuration:

| Parameter label (name) | Default | Description |
|---------------------------------------|---------------|-------------------------------------|
| DB Admin User (DBAdminUser) | EvaluateAdmin | The database admin account username |

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| DB Admin Password (DBAdminPassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, , and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |
| DB Evaluate User (DBEvaluateUser) | EvaluateUser | The database non-admin account username |
| DB Evaluate Password (DBEvaluatePassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, , and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |

Amazon S3 Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|--|
| S3 Evaluate Bucket (S3EvaluateBucket) | <i>Requires input</i> | The name of a new bucket that will be used to store Attachments. The actual name will be evaluate- <code><AccountId>-<whatever-you-enter-here></code> , e.g. evaluate-344201342714-my.new.bucket |

Microsoft Active Directory Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| Domain DNS Name (DomainDNSName) | <i>Requires input</i> | Fully qualified domain name (FQDN) of the forest root domain e.g. corp.example.com |
| Domain IPs (DomainIPs) | <i>Requires input</i> | A comma separated list of DNS IP addresses for the AD Domain |
| Domain NetBios Name (DomainNetBiosName) | <i>Requires input</i> | Netbios name for the domain, e.g. MYCOMPANY |
| Domain Admin User (DomainAdminUser) | <i>Requires input</i> | User name for the account that will be added as Domain Administrator. This is separate from the default "EC2 Administrator" account |
| Domain Admin Password (DomainAdminPassword) | <i>Requires input</i> | Password of the Domain Administrator's account. This is separate from the default "EC2 Administrator" account |

Amazon Connect Configuration:

| Parameter label (name) | Default | Description |
|--------------------------------|-----------------------|---|
| S3 Bucket (S3Bucket) | <i>Requires input</i> | Amazon Connect Data Streaming S3 Bucket |

Amazon Elasticsearch Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------------|---|
| ES Domain (ESDomain) | evaluate | This is the name for the Elasticsearch Domain |
| ES Instance Type (ESInstanceType) | t2.medium.elasticse arch | Amazon Elasticsearch instance type |

AWS Quick Start Configuration:

| Parameter label (name) | Default | Description |
|---|---|---|
| Quick Start S3 Bucket Name (QSS3BucketName) | quickstart- reference | S3 bucket name for the Quick Start assets. This string can include numbers, lowercase letters, uppercase letters, and hyphens (-). It cannot start or end with a hyphen (-) |
| Quick Start S3 Key Prefix (QSS3KeyPrefix) | connect/integration /qualtrak/evaluate/ latest/ | S3 key prefix for the Quick Start assets. Quick Start key prefix can include numbers, lowercase letters, uppercase letters, hyphens (-), and forward slash (/) |

5. On the **Options** page, you can [specify tags](#) (key-value pairs) for resources in your stack and [set advanced options](#). When you're done, choose **Next**.
 6. On the **Review** page, review and confirm the template settings. Under **Capabilities**, select the check box to acknowledge that the template will create IAM resources.
 7. Choose **Create** to deploy the stack.
 8. Monitor the status of the stack. When the status is **CREATE_COMPLETE**, the **Evaluate for Amazon Connect** cluster is ready.
 9. Use the URLs displayed in the **Outputs** tab for the stack to view the resources that were created.
- **Option 2: Parameters for deploying Evaluate for Amazon Connect with Data Streaming into an existing VPC**

This option will deploy the [Data Streaming](#) stack and **Evaluate for Amazon Connect** into an existing VPC.

[View template](#)

Amazon VPC Configuration:

| Parameter label (name) | Default | Description |
|--|-----------------------|---|
| VPC ID (VPCID) | <i>Requires input</i> | ID of your existing VPC for deployment |
| Private Subnet ID (PrivateSubnet1CIDR) | <i>Requires input</i> | ID of private subnet in an Availability Zone (e.g., subnet-a0246dcd) |
| Public Subnet ID (PublicSubnet1CIDR) | <i>Requires input</i> | ID of public subnet in an Availability Zone (e.g., subnet-9bc642ac) |
| Key Name (KeyPairName) | <i>Requires input</i> | Name of an existing EC2 key pair. All instances will launch with this key pair. |

Amazon Redshift Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| Database Name (DatabaseName) | acctr | Provide a name for your database or accept the default |
| Master User Name (MasterUserName) | <i>Requires input</i> | Provide a name for the database administrator account or accept the default |
| Master User Password (MasterUserPassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |
| Database Port (MasterUserName) | 5439 | Provide a database port or accept the default |

Amazon EC2 Configuration:

| Parameter label (name) | Default | Description |
|--|-----------------------|--|
| Instance Type (InstanceType) | m4.large | Amazon EC2 instance type |
| RDP From (RDPFrom) | <i>Requires input</i> | Lockdown RDP access to EC2 instance from valid IPv4 address, e.g. 201.0.1.3/19 |

Amazon RDS Configuration:

| Parameter label (name) | Default | Description |
|---------------------------------------|---------------|-------------------------------------|
| DB Admin User (DBAdminUser) | EvaluateAdmin | The database admin account username |

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| DB Admin Password (DBAdminPassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, , and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |
| DB Evaluate User (DBEvaluateUser) | EvaluateUser | The database non-admin account username |
| DB Evaluate Password (DBEvaluatePassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, , and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |

Amazon S3 Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|--|
| S3 Evaluate Bucket (S3EvaluateBucket) | <i>Requires input</i> | The name of a new bucket that will be used to store Attachments. The actual name will be evaluate- <code><AccountId>-<whatever-you-enter-here></code> , e.g. evaluate-344201342714-my.new.bucket |

Microsoft Active Directory Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| Domain DNS Name (DomainDNSName) | <i>Requires input</i> | Fully qualified domain name (FQDN) of the forest root domain e.g. corp.example.com |
| Domain IPs (DomainIPs) | <i>Requires input</i> | A comma separated list of DNS IP addresses for the AD Domain |
| Domain NetBios Name (DomainNetBiosName) | <i>Requires input</i> | Netbios name for the domain, e.g. MYCOMPANY |
| Domain Admin User (DomainAdminUser) | <i>Requires input</i> | User name for the account that will be added as Domain Administrator. This is separate from the default "EC2 Administrator" account |
| Domain Admin Password (DomainAdminPassword) | <i>Requires input</i> | Password of the Domain Administrator's account. This is separate from the default "EC2 Administrator" account |

Amazon Connect Configuration:

| Parameter label (name) | Default | Description |
|--------------------------------|-----------------------|---|
| S3 Bucket (S3Bucket) | <i>Requires input</i> | Amazon Connect Data Streaming S3 Bucket |

Amazon Elasticsearch Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------------|---|
| ES Domain (ESDomain) | evaluate | This is the name for the Elasticsearch Domain |
| ES Instance Type (ESInstanceType) | t2.medium.elasticse arch | Amazon Elasticsearch instance type |

AWS Quick Start Configuration:

| Parameter label (name) | Default | Description |
|---|---|---|
| Quick Start S3 Bucket Name (QSS3BucketName) | quickstart- reference | S3 bucket name for the Quick Start assets. This string can include numbers, lowercase letters, uppercase letters, and hyphens (-). It cannot start or end with a hyphen (-) |
| Quick Start S3 Key Prefix (QSS3KeyPrefix) | connect/integration /qualtrak/evaluate/ latest/ | S3 key prefix for the Quick Start assets. Quick Start key prefix can include numbers, lowercase letters, uppercase letters, hyphens (-), and forward slash (/) |

5. On the **Options** page, you can [specify tags](#) (key-value pairs) for resources in your stack and [set advanced options](#). When you're done, choose **Next**.
 6. On the **Review** page, review and confirm the template settings. Under **Capabilities**, select the check box to acknowledge that the template will create IAM resources.
 7. Choose **Create** to deploy the stack.
 8. Monitor the status of the stack. When the status is **CREATE_COMPLETE**, the **Evaluate for Amazon Connect** cluster is ready.
 9. Use the URLs displayed in the **Outputs** tab for the stack to view the resources that were created.
- **Option 3: Parameters for deploying Evaluate for Amazon Connect without Data Streaming into an existing VPC**

This option will deploy **Evaluate for Amazon Connect** into an existing VPC.

[View template](#)*Amazon EC2 Configuration:*

| Parameter label (name) | Default | Description |
|--|-----------------------|--|
| Instance Type (InstanceType) | m4.large | Amazon EC2 instance type |
| Key Name (KeyPairName) | <i>Requires input</i> | Name of an existing EC2 key pair. All instances will launch with this key pair. |
| RDP From (RDPFrom) | <i>Requires input</i> | Lockdown RDP access to EC2 instance from valid IPv4 address, e.g. 201.0.1.3/19 |
| VPC ID (VPCID) | <i>Requires input</i> | ID of your existing VPC for deployment |
| Subnet ID (SubnetID) | <i>Requires input</i> | Must select 2 or more. 1st is required by EC2 instance. All are required by RDS Subnet Group |

Amazon RDS Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| DB Admin User (DBAdminUser) | EvaluateAdmin | The database admin account username |
| DB Admin Password (DBAdminPassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, , and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |
| DB Evaluate User (DBEvaluateUser) | EvaluateUser | The database non-admin account username |
| DB Evaluate Password (DBEvaluatePassword) | <i>Requires input</i> | Password must contain 8 to 64 printable ASCII characters excluding /, ", ', \, , and @. It must contain 1 uppercase letter, 1 lowercase letter, and 1 number. |

Amazon S3 Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|--|
| S3 Evaluate Bucket (S3EvaluateBucket) | <i>Requires input</i> | The name of a new bucket that will be used to store Attachments. The actual name will be evaluate- <code><AccountId>-<whatever-you-enter-here></code> , e.g. evaluate-344201342714-my.new.bucket |

Microsoft Active Directory Configuration:

| Parameter label (name) | Default | Description |
|---|-----------------------|---|
| Domain DNS Name (DomainDNSName) | <i>Requires input</i> | Fully qualified domain name (FQDN) of the forest root domain e.g. corp.example.com |
| Domain IPs (DomainIPs) | <i>Requires input</i> | A comma separated list of DNS IP addresses for the AD Domain |
| Domain NetBios Name (DomainNetBiosName) | <i>Requires input</i> | Netbios name for the domain, e.g. MYCOMPANY |
| Domain Admin User (DomainAdminUser) | <i>Requires input</i> | User name for the account that will be added as Domain Administrator. This is separate from the default "EC2 Administrator" account |
| Domain Admin Password (DomainAdminPassword) | <i>Requires input</i> | Password of the Domain Administrator's account. This is separate from the default "EC2 Administrator" account |

Amazon Connect Configuration:

| Parameter label (name) | Default | Description |
|--|-----------------------|--|
| S3 Bucket (S3Bucket) | <i>Requires input</i> | Amazon Connect Data Streaming S3 Bucket |
| Kinesis Stream (KinesisStream) | <i>Requires input</i> | The name of your existing Kinesis Stream |

Amazon ElasticSearch Configuration:

| Parameter label (name) | Default | Description |
|---|---------------------------------|---|
| ES Domain (ESDomain) | evaluate | This is the name for the ElasticSearch Domain |
| ES Instance Type (ESInstanceType) | t2.medium.elasticsearch arch | Amazon ElasticSearch instance type |

AWS Quick Start Configuration:

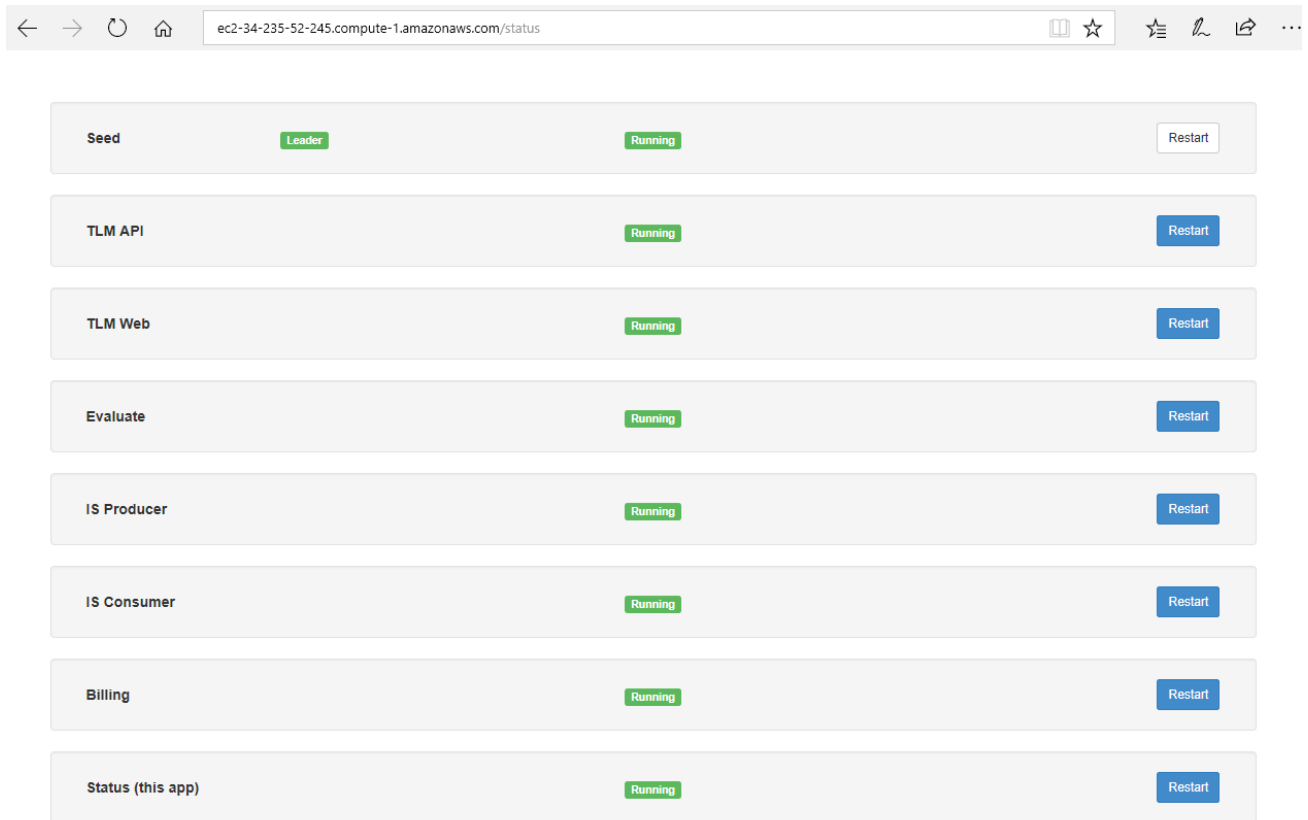
| Parameter label (name) | Default | Description |
|---|----------------------|---|
| Quick Start S3 Bucket Name (QSS3BucketName) | quickstart-reference | S3 bucket name for the Quick Start assets. This string can include numbers, lowercase letters, uppercase letters, and hyphens (-). It cannot start or end with a hyphen (-) |

| Parameter label (name) | Default | Description |
|---|---|--|
| Quick Start S3 Key Prefix (QSS3KeyPrefix) | connect/integration/ qualtrak/evaluate/ latest/ | S3 key prefix for the Quick Start assets. Quick Start key prefix can include numbers, lowercase letters, uppercase letters, hyphens (-), and forward slash (/) |

5. On the **Options** page, you can [specify tags](#) (key-value pairs) for resources in your stack and [set advanced options](#). When you're done, choose **Next**.
6. On the **Review** page, review and confirm the template settings. Under **Capabilities**, select the check box to acknowledge that the template will create IAM resources.
7. Choose **Create** to deploy the stack.
8. Monitor the status of the stack. When the status is **CREATE_COMPLETE**, the **Evaluate for Amazon Connect** cluster is ready.
9. Use the URLs displayed in the **Outputs** tab for the stack to view the resources that were created.

Step 4. Test the Deployment

1. Navigate to the public URL as shown in the ClusterStatusUrl field of the Deployment Stack.
2. Log in as the Local Administrator by obtaining the password from the AWS EC2 Console.
3. Verify all that the Services have green 'Running' labels shown. If TLM Web or Evaluate show Red 'Stopped' labels, please navigate to the URL as shown in the TlmUrl or EvaluateUrl fields respectively and wait for 60 seconds.



The screenshot shows a web browser window with the address bar displaying 'ec2-34-235-52-245.compute-1.amazonaws.com/status'. The page content consists of a list of services, each with a status label and a 'Restart' button. The services and their statuses are:

| Service | Status | Action |
|-------------------|---------|---------|
| Seed | Leader | Restart |
| TLM API | Running | Restart |
| TLM Web | Running | Restart |
| Evaluate | Running | Restart |
| IS Producer | Running | Restart |
| IS Consumer | Running | Restart |
| Billing | Running | Restart |
| Status (this app) | Running | Restart |

- a. If the Seed node shows a red 'Stopped' label then you must restart the EC2 instance.
 - b. If any of the nodes (expect Seed) show a red 'Stopped' label then press the associated 'Restart' button.
4. The deployment is successful when all services show a green 'Running' labels.

Step 5. [Enable Data Streaming](#)

Follow the steps in the Amazon Connect documentation to set up data streaming.

Step 6. [Configure the integration](#)

The above link will walk you through how to setup **Evaluate for Amazon Connect** by showing you how to import AD users, create your organisation's hierarchy, search and play calls.

For brevity and quick access to the web applications that make up **Evaluate for Amazon Connect**, see here:

You will have access to 2 web applications. These are:

- http://<public_dns>/tlm (Tenant Management System)
- http://<public_dns>/evaluate (Evaluate for Amazon Connect)

The Tenant Management System (TLM) is the application you use to manage your tenants. You must create at least one tenant before you can access Evaluate for Amazon Connect. Evaluate for Amazon Connect is configured for SSO with your Active Directory.

Open Internet Explorer 9+ and paste in the http://<public_dns>/tlm URL found in the CloudFormation Outputs TlmUrl Value column. Use '\Administrator' (local Administrator) & password (obtain EC2 instance password via AWS Console) when prompted by the browser. Next, follow the page instructions to add your first tenant – see here (http://aws.qualtrak.com/e4ac/E4AC_QuickStartGuide_CreateFirstTenant.pdf) for a easy to follow instructions. Please note, the 'Primary Administrator' MUST BE an Active Directory account. Please DO NOT use an AD Administrator's account as the 'Primary Administrator'. Evaluate sends notifications via email so please have your SMTP details ready as you will be asked for them. Once the tenant is created, paste in the http://<public_dns>/evaluate URL found in the CloudFormation Outputs EvaluateUrl Value column. Use the 'Primary Administrator' Active Directory credentials you entered when creating the tenant to log into Evaluate.

For support, please access contact details in our Marketplace listing page. Please use only IE 9 or above to access our products.

For a detailed guide on how to use **Evaluate for Amazon Connect** see here - http://aws.qualtrak.com/e4ac/E4AC_QuickStartGuide.pdf

Best Practices Using Evaluate for Amazon Connect on AWS

Please follow these recommended best practices:

- Configure your RDS MSSQL Db Retention to period to at least 7 days.
- Configure a maintenance window for your RDS MSSQL Db which is outside of your normal working day.
- Before you perform an upgrade to a new release, make create a backup of your RDS MSSQL Db
- Configure your new S3 bucket for Replication to another Region
- Configure your new S3 bucket with Server Side Encrypted (SSE-S3), and AES-256 as a minimum.

FAQ

Please also see here - <http://aws.qualtrak.com/e4ac/FAQs.pdf> - for a list of FAQs.

Please also visit here - <http://developer.qualtrak.com/AWSMarketplace>- for a list of other supporting materials.

Q. How long do I need to keep recordings for?

A. This all depends on your Compliance and regulatory obligation, however, Evaluate for Amazon Connect requires to playback the recording and recommend to have an S3 Lifecycle rule to expire no shorter than 8 weeks.

Q. How much will supporting AWS service cost per month?

A. Please see here - <http://aws.qualtrak.com/e4ac/FAQs.pdf>

Q. You have a non-AWS related issues

A. For support, please contact Qualtrak's support desk at this address - <http://www.qualtrak.com/support/>

Q. I encountered a CREATE_FAILED error when I launched the CFT. What should I do?

A. If AWS CloudFormation fails to create the stack, we recommend that you relaunch the template with **Rollback on failure** set to **No**. (This setting is under **Advanced** in the AWS CloudFormation console, **Options** page.) With this setting, the stack's state will be

retained and the instance will be left running, so you can troubleshoot the issue. (You'll want to look at the log files in %ProgramFiles%\Amazon\EC2ConfigService and C:\cfn\log.)

Important When you set **Rollback on failure** to **No**, you'll continue to incur AWS charges for this stack. Please make sure to delete the stack when you've finished troubleshooting.

For additional information, see [Troubleshooting AWS CloudFormation](#) on the AWS website or contact us on the [AWS Quick Start Discussion Forum](#).

Q. I encountered a size limitation error when I deployed the AWS Cloudformation templates.

A. We recommend that you launch the CFT from the location we've provided or from another S3 bucket. If you deploy the templates from a local copy on your computer or from a non-S3 location, you might encounter template size limitations when you create the stack. For more information about AWS CloudFormation limits, see the [AWS documentation](#).

Additional Resources

AWS services

- Amazon EC2
<https://docs.aws.amazon.com/AWSEC2/latest/WindowsGuide/>
- AWS CloudFormation
<https://aws.amazon.com/documentation/cloudformation/>
- Amazon VPC
<https://aws.amazon.com/documentation/vpc/>
- Amazon EBS
<http://docs.aws.amazon.com/AWSEC2/latest/UserGuide/AmazonEBS.html>

Evaluate for Amazon Connect

- Setup up **Evaluate for Amazon Connect**
http://aws.qualtrak.com/e4ac/E4AC_Setup.pdf
- How to create your first tenant (a tenant must exist before you use the Evaluate web application)
http://aws.qualtrak.com/e4ac/E4AC_QuickStartGuide_CreateFirstTenant.pdf
- Detailed guide on how to use **Evaluate for Amazon Connect**
http://aws.qualtrak.com/e4ac/E4AC_QuickStartGuide.pdf

Quick Start reference deployments

- AWS Quick Start home page
<https://aws.amazon.com/quickstart/>

Send Us Feedback

You can visit our [GitHub repository](#) to download the templates and scripts for this CFT, to post your comments, and to share your customizations with others.

Document Revisions

| Date | Change | In sections |
|-------------------|---------------------|-------------|
| March 2018 | Initial publication | — |

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