

Deploy and setup instructions

Evaluate for Amazon Connect

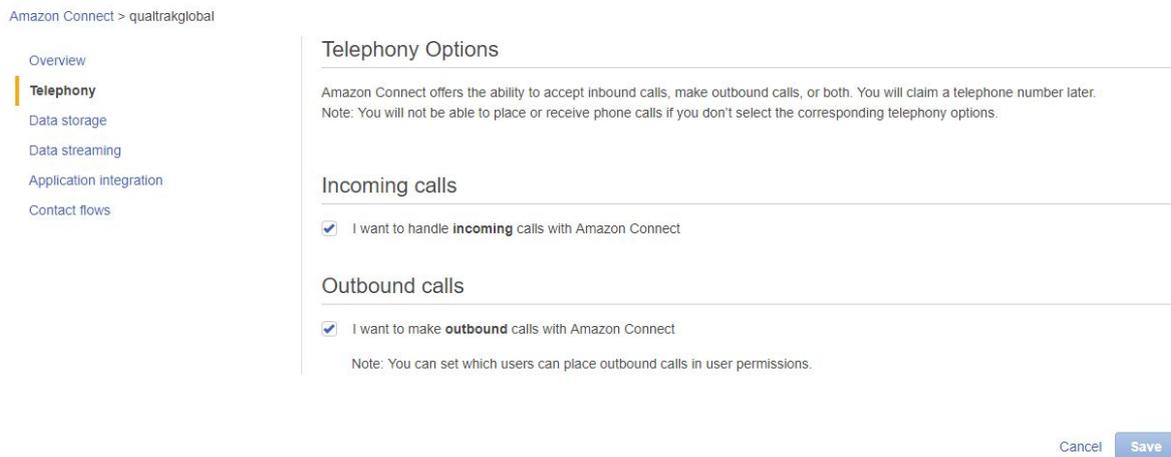
This document is broken down into these sections:

1. Before you deploy **Evaluate for Amazon Connect**
2. Create your first Tenant
3. Create your Tenant hierarchy
4. Search for a recording

(1) Before you deploy **Evaluate for Amazon Connect**

Before you start to deploy the CloudFormation Stack log into the AWS Console and go to your Amazon connect instance that you want to add Quality Monitoring to.

Please select the **Telephony** tab.



The screenshot shows the Amazon Connect console interface. On the left, there is a navigation menu with the following items: Overview, **Telephony** (highlighted with a yellow bar), Data storage, Data streaming, Application integration, and Contact flows. The main content area is titled "Telephony Options" and contains the following text: "Amazon Connect offers the ability to accept inbound calls, make outbound calls, or both. You will claim a telephone number later. Note: You will not be able to place or receive phone calls if you don't select the corresponding telephony options." Below this, there are two sections: "Incoming calls" and "Outbound calls". Under "Incoming calls", there is a checked checkbox next to the text "I want to handle **incoming** calls with Amazon Connect". Under "Outbound calls", there is a checked checkbox next to the text "I want to make **outbound** calls with Amazon Connect". A note below the "Outbound calls" section states: "Note: You can set which users can place outbound calls in user permissions." At the bottom right of the form, there are two buttons: "Cancel" and "Save".

Please ensure that both Incoming and Outbound calls options are checked.

Next, select the **Data storage** tab.

- Overview
- Telephony
- Data storage**
- Data streaming
- Application integration
- Contact flows

Data storage

Saving Amazon Connect data such as call recordings or scheduled reports requires access to an Amazon S3 bucket. Your data storage configurations for Amazon Connect is reflected below.

Call recordings

Enable call recording Cancel Save

Create a new S3 bucket for me (recommended)

Select an existing S3 bucket

Name

Path prefix ⓘ

Location: connect-befb471d7720/connect/qualtrakglobal/CallRecordings

Encryption options for call recordings

Enable encryption

Select KMS key by name

Enter key ARN/ID

KMS master key ⓘ

ARN / ID

Description Default master key that protects my Connect calls when no other key is defined

Account 488200342723

Exported reports

Exported reports will be stored here Edit

Encrypted using this key

Please make a note of the S3 Bucket name as you'll need to key it in shortly.

Now, please select the **Data streaming** tab.

Amazon Connect > qualtrakglobal

- Overview
- Telephony
- Data storage
- Data streaming**
- Application integration
- Contact flows

Data streaming

You can export Contact Trace Records (CTRs) from Amazon Connect in order to perform analysis on your contacts. Get started by enabling data streaming and utilizing Amazon Kinesis Stream or Amazon Kinesis Firehose to export your data. [Learn more.](#)

Enable data streaming
By enabling this feature, you are granting us the permission to put records to your Kinesis Stream or Kinesis Firehose.

Streaming resources

Use one of your existing Amazon Kinesis Stream or Amazon Kinesis Firehose from the list below, or create a new one.

Kinesis Firehose ⓘ Kinesis Stream ⓘ

[Create a new Kinesis Stream](#)

Cancel Save

Please make a note of the Kinesis Stream name currently being used to stream the CTRs. In the example above, the stream that is being used is *test-ks*.

Now, please go ahead and deploy **Evaluate for Amazon Connect**.

(2) Create your first Tenant

Once deployed, select the Stack entry in the CloudFormation listing (see below's example) and select the Output tab.

The TlmUrl field contains the endpoint for the TLM web application. The TLM is the Tenant Management System. This is where you must go first. Here, you will add your first Tenant.

Stack Name	Status	Creation Time	Creation Reason	Description
gktest-evalstack-39028J...	NESTED	2017-11-07 11:12:58 UTC+0000	CREATE_COMPLETE	This template creates a EC2 instance with SQL Server Express Edition that is to be used with the Qualtrak DevTest CI/CD environment
gktest-connectstack-D1YWY...	NESTED	2017-11-07 10:48:03 UTC+0000	CREATE_COMPLETE	This template creates a Kinesis Firehose to ElasticSearch to feed from a user inputted Kinesis Stream name
gktest-ec2securitystack-18T9...	NESTED	2017-11-07 10:46:56 UTC+0000	CREATE_COMPLETE	This template creates the appropriate resources that are required by the EC2 instance
gktest	CREATE_COMPLETE	2017-11-07 10:46:49 UTC+0000	CREATE_COMPLETE	This master template creates an infrastructure for Evaluate for Amazon Connect on AWS. **WARNING** This template creates EC2 instan...

Key	Value	Description	Export Name
TlmUrl	ec2-52-54-230-72.compute-1.amazonaws.com/tlm	Url for Tenant Management System web application (Windows Authen...	
ClusterStatusUrl	ec2-52-54-230-72.compute-1.amazonaws.com/status	Url for Cluster Status web application (Windows Authentication)	
PrivateIp	172.31.29.252	Private Ip Address	
PublicIp	52.54.230.72	Public Ip Address	
EvaluateUrl	ec2-52-54-230-72.compute-1.amazonaws.com/evaluate	Url for Evaluate for Amazon Connect web application (Active Directory)	

Login into {TlmUrl} as local administrator (\Administrator). You can get the local administrator's password for the EC2 instance from AWS Console.

Once in, you will see a page similar to this:

The screenshot shows the Tenant Management System interface. At the top, there's a navigation bar with 'Tenant' and 'Global Policy' tabs. Below that, a header says 'Maintain your list of tenants' with a blue '+' button and the text 'press to add a new Tenant'. The main area contains a table with columns: Name, Billing, Created, Code, Contact, Phone, and Email. On the right side, there's a 'Hints' sidebar with the following text:

- Only deactivated Tenants can be deleted.
- A check is performed before you get the option to delete a Tenant.
- Before you can delete a Tenant you must enter in the Tenant Code.
- Deactivated Tenants have all their Users deactivated.
- When you create a Tenant, an invitation Email is sent to the elected Administrator.

At the bottom of the sidebar, there's another blue '+' button with the text 'press to add a new Tenant'.

Press the blue '+' button. Fill out the form. The Primary Administrator is the administrator for the Tenant. It must not be an Active Directory Administrator. Once added, you will receive confirmation of this new Tenant:

Q Tenant Global Policy EC2AMAZ-70P939PI/Administrator

Tenant

Tenant complete

Tenant 1000 has been created!

-  A new Tenant has been created
-  An Administrator user has been created for this Tenant
-  A temporary password has been assigned to this Administrator
-  An Email invitation has been sent to this Administrator
-  The Administrator must provide a new password

[Done](#)

Press **Done** to return to the Tenant listing page.

The Primary Administrator will now have received their **Welcome** email.

(3) Create your Tenant hierarchy

The Url to use to access Evaluate for Amazon Connect can be found in the CloudFormation stack Output tab. The field **{EvaluateUrl}** contains the endpoint for this web application.

Log into **{EvaluateUrl}** as the Primary Administrator. These will be the Active Directory credentials for the Tenant's Primary Administrator. Once in, you will see a page similar to this:

Q Home Performance Center Template Designer Garrard Kitchen

Get Started



Console



Template Designer



Evaluation

▼



InstantCoach

▼

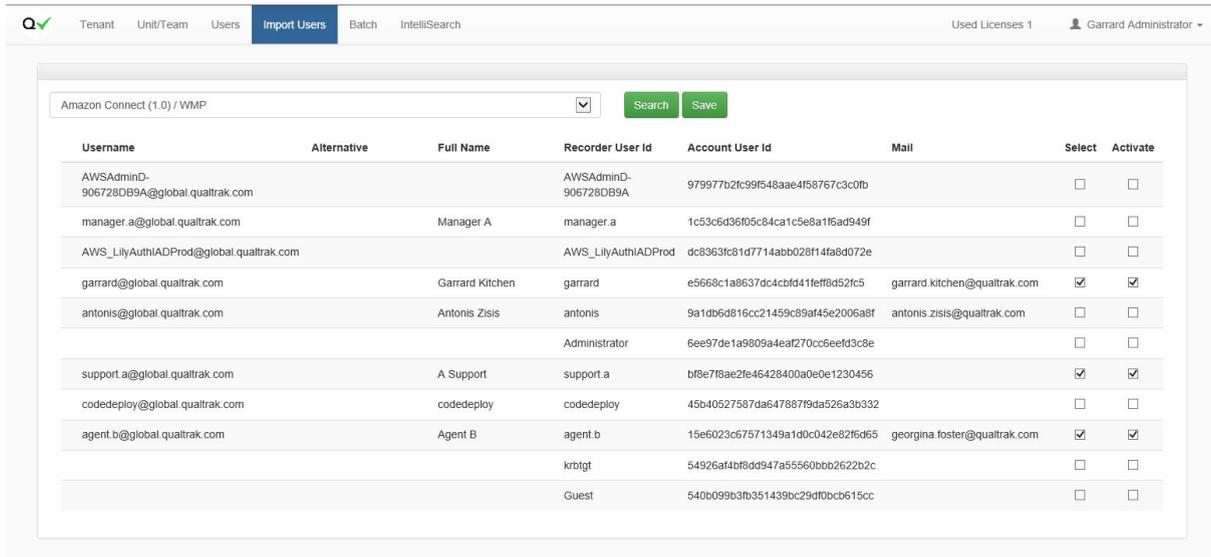


Coaching Session

▼

To import users (including agents) navigate to Console > Import Users > Select **Amazon Connect (1.0)** **WMP** from dropdown > Search.

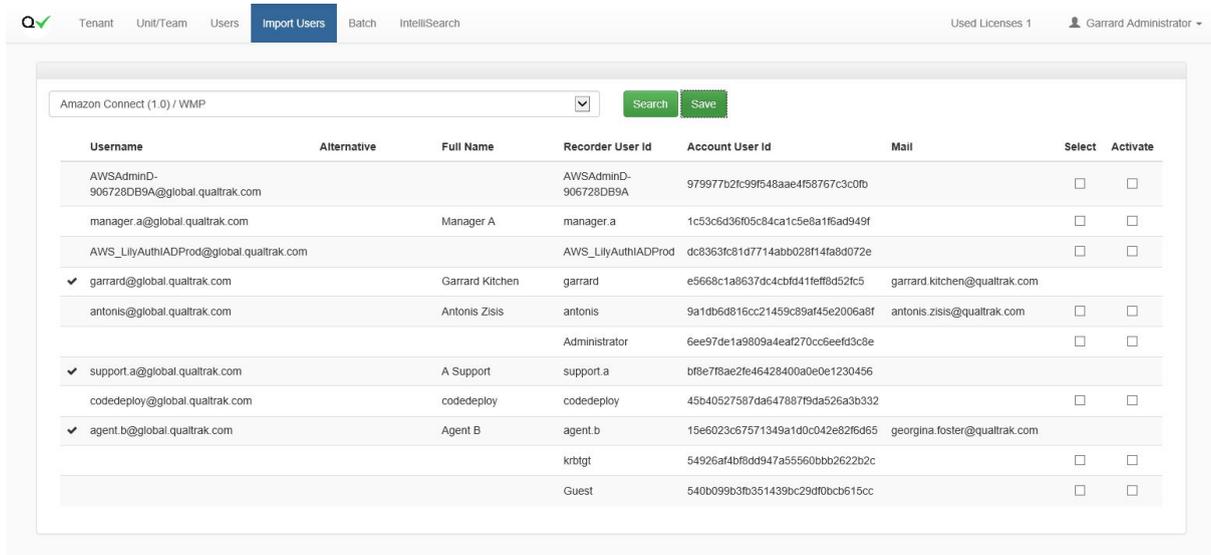
Please select [tick] those that you want to imported and made active.



The screenshot shows the 'Import Users' page in the Qualtrak console. The breadcrumb trail is 'Tenant > Unit/Team > Users > Import Users'. The page title is 'Amazon Connect (1.0) / WMP'. There are 'Search' and 'Save' buttons. A table lists imported users with columns for Username, Alternative, Full Name, Recorder User Id, Account User Id, Mail, Select, and Activate. The 'garrard@global.qualtrak.com' and 'support.a@global.qualtrak.com' rows have their 'Select' checkboxes checked.

Username	Alternative	Full Name	Recorder User Id	Account User Id	Mail	Select	Activate
AWSAdminD-906728DB9A@global.qualtrak.com			AWSAdminD-906728DB9A	979977b2fc99f548aae4f58767c3c0fb		<input type="checkbox"/>	<input type="checkbox"/>
manager.a@global.qualtrak.com		Manager A	manager.a	1c53c6d36f05c84ca1c5e8a1f6ad949f		<input type="checkbox"/>	<input type="checkbox"/>
AWS_LilyAuthIADProd@global.qualtrak.com			AWS_LilyAuthIADProd	dc8363fc81d7714abb028f14fa8d072e		<input type="checkbox"/>	<input type="checkbox"/>
garrard@global.qualtrak.com		Garrard Kitchen	garrard	e5668c1a8637dc4cbfd41eff8d52fc5	garrard.kitchen@qualtrak.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
antonis@global.qualtrak.com		Antonis Zisis	antonis	9a1db6d816cc21459c89af45e2006a8f	antonis.zisis@qualtrak.com	<input type="checkbox"/>	<input type="checkbox"/>
		Administrator		6ee97de1a9809a4eaf270cc6eefd3c8e		<input type="checkbox"/>	<input type="checkbox"/>
support.a@global.qualtrak.com		A Support	support.a	bf8e7f8ae2fe46428400a0e0e1230456		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
codedeploy@global.qualtrak.com		codedeploy	codedeploy	45b40527587da647887f9da526a3b332		<input type="checkbox"/>	<input type="checkbox"/>
agent.b@global.qualtrak.com		Agent B	agent.b	15e6023c67571349a1d0c042e82f6d65	georgina.foster@qualtrak.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		krltgt		54926af4bf8dd947a55560bb2622b2c		<input type="checkbox"/>	<input type="checkbox"/>
		Guest		540b099b3fb351439bc29df0bcb615cc		<input type="checkbox"/>	<input type="checkbox"/>

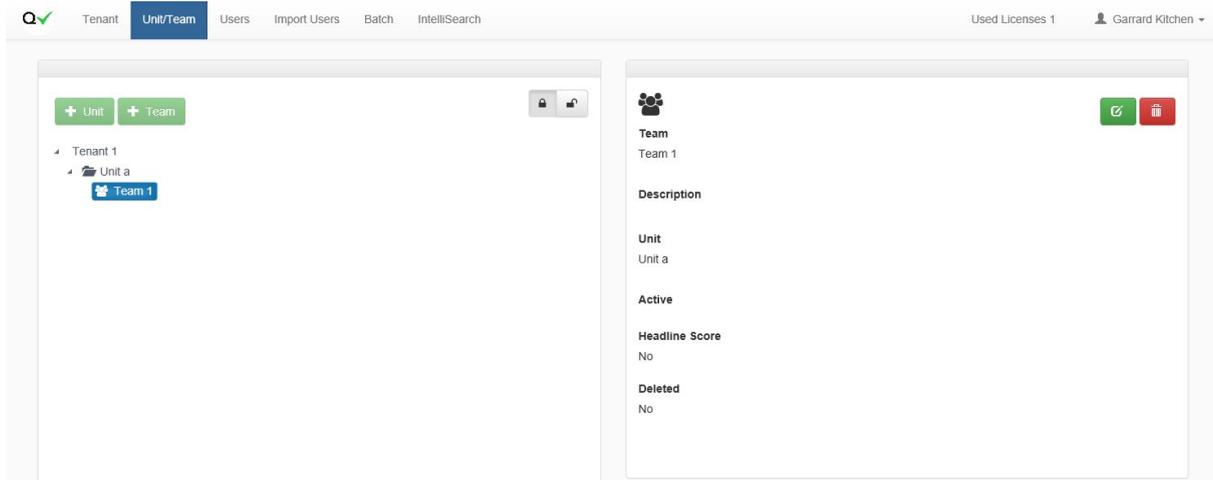
Press the **Save** button and you'll see confirmation of the save in the form of ticks to the left of the Username. This is illustrated here:



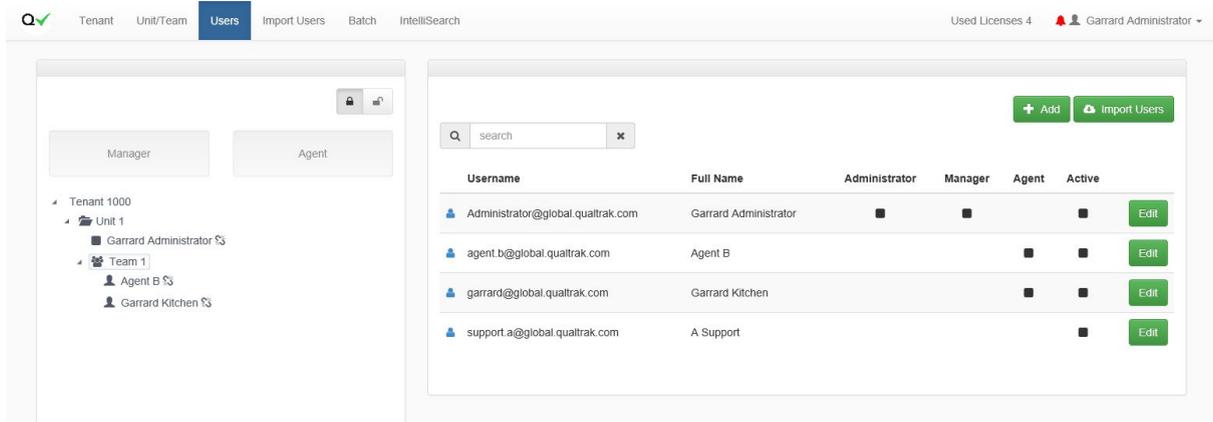
This screenshot shows the same 'Import Users' page after the 'Save' button has been clicked. The 'garrard@global.qualtrak.com', 'support.a@global.qualtrak.com', and 'agent.b@global.qualtrak.com' rows now have a checkmark (✓) to the left of their 'Username' column, indicating they have been successfully saved.

Username	Alternative	Full Name	Recorder User Id	Account User Id	Mail	Select	Activate
AWSAdminD-906728DB9A@global.qualtrak.com			AWSAdminD-906728DB9A	979977b2fc99f548aae4f58767c3c0fb		<input type="checkbox"/>	<input type="checkbox"/>
manager.a@global.qualtrak.com		Manager A	manager.a	1c53c6d36f05c84ca1c5e8a1f6ad949f		<input type="checkbox"/>	<input type="checkbox"/>
AWS_LilyAuthIADProd@global.qualtrak.com			AWS_LilyAuthIADProd	dc8363fc81d7714abb028f14fa8d072e		<input type="checkbox"/>	<input type="checkbox"/>
✓ garrard@global.qualtrak.com		Garrard Kitchen	garrard	e5668c1a8637dc4cbfd41eff8d52fc5	garrard.kitchen@qualtrak.com	<input type="checkbox"/>	<input type="checkbox"/>
antonis@global.qualtrak.com		Antonis Zisis	antonis	9a1db6d816cc21459c89af45e2006a8f	antonis.zisis@qualtrak.com	<input type="checkbox"/>	<input type="checkbox"/>
		Administrator		6ee97de1a9809a4eaf270cc6eefd3c8e		<input type="checkbox"/>	<input type="checkbox"/>
✓ support.a@global.qualtrak.com		A Support	support.a	bf8e7f8ae2fe46428400a0e0e1230456		<input type="checkbox"/>	<input type="checkbox"/>
codedeploy@global.qualtrak.com		codedeploy	codedeploy	45b40527587da647887f9da526a3b332		<input type="checkbox"/>	<input type="checkbox"/>
✓ agent.b@global.qualtrak.com		Agent B	agent.b	15e6023c67571349a1d0c042e82f6d65	georgina.foster@qualtrak.com	<input type="checkbox"/>	<input type="checkbox"/>
		krltgt		54926af4bf8dd947a55560bb2622b2c		<input type="checkbox"/>	<input type="checkbox"/>
		Guest		540b099b3fb351439bc29df0bcb615cc		<input type="checkbox"/>	<input type="checkbox"/>

Next, create a Tenant Structure:

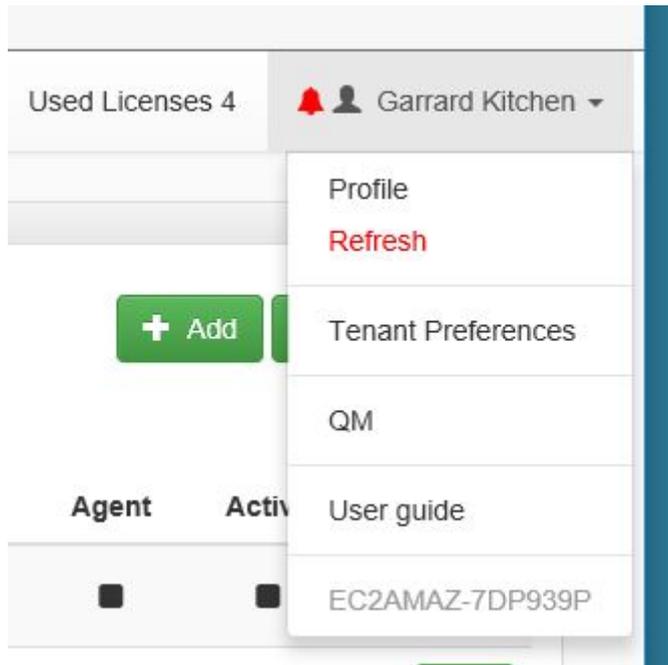


Now add users to the structure:



Username	Full Name	Administrator	Manager	Agent	Active	
Administrator@global.qualtrak.com	Garrard Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
agent.b@global.qualtrak.com	Agent B	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
garrard@global.qualtrak.com	Garrard Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
support.a@global.qualtrak.com	A Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

As I've assigned myself (global\Administrator) to be manager of Unit 1, I need to go and **Refresh** my profile so permissions become current:



Please select the **Refresh** option in dropdown menu.

You will now find yourself back in the Home page in QM section.

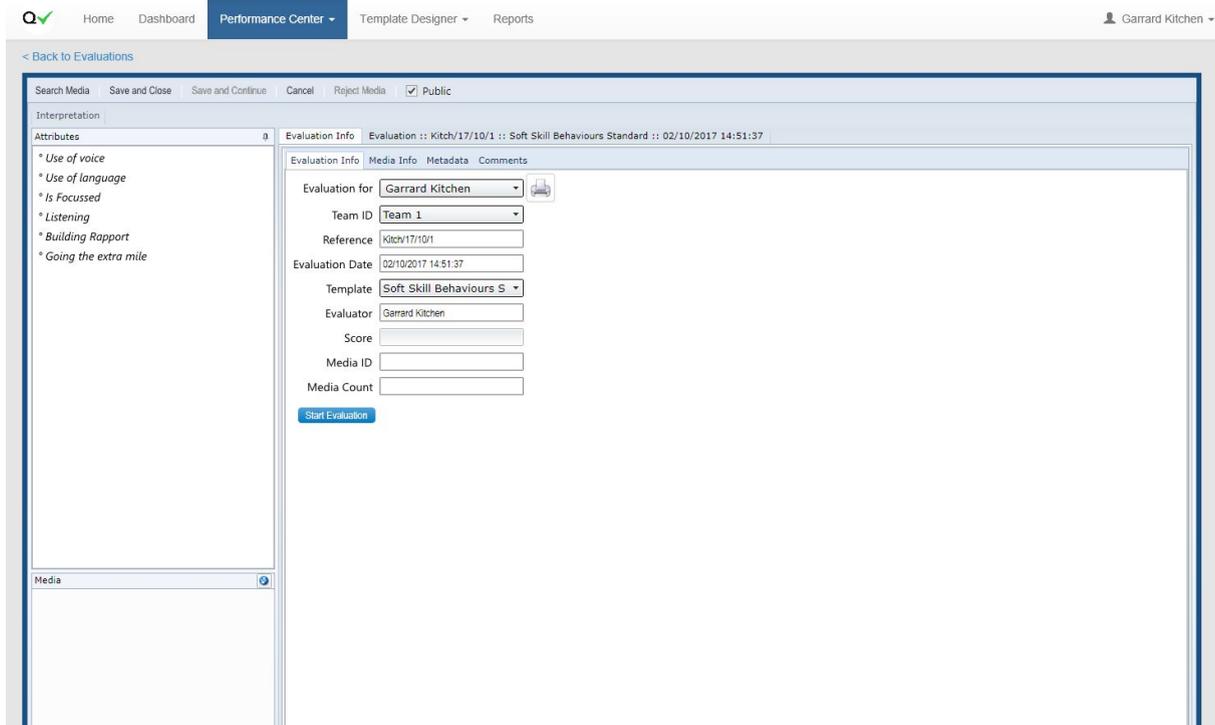
(4) Search for a recording

To start the Evaluation process, select the Evaluation (expand and click Other) option in the page (or menu).

Next, expand the hierarchy tree in left panel until you see an agent icon 

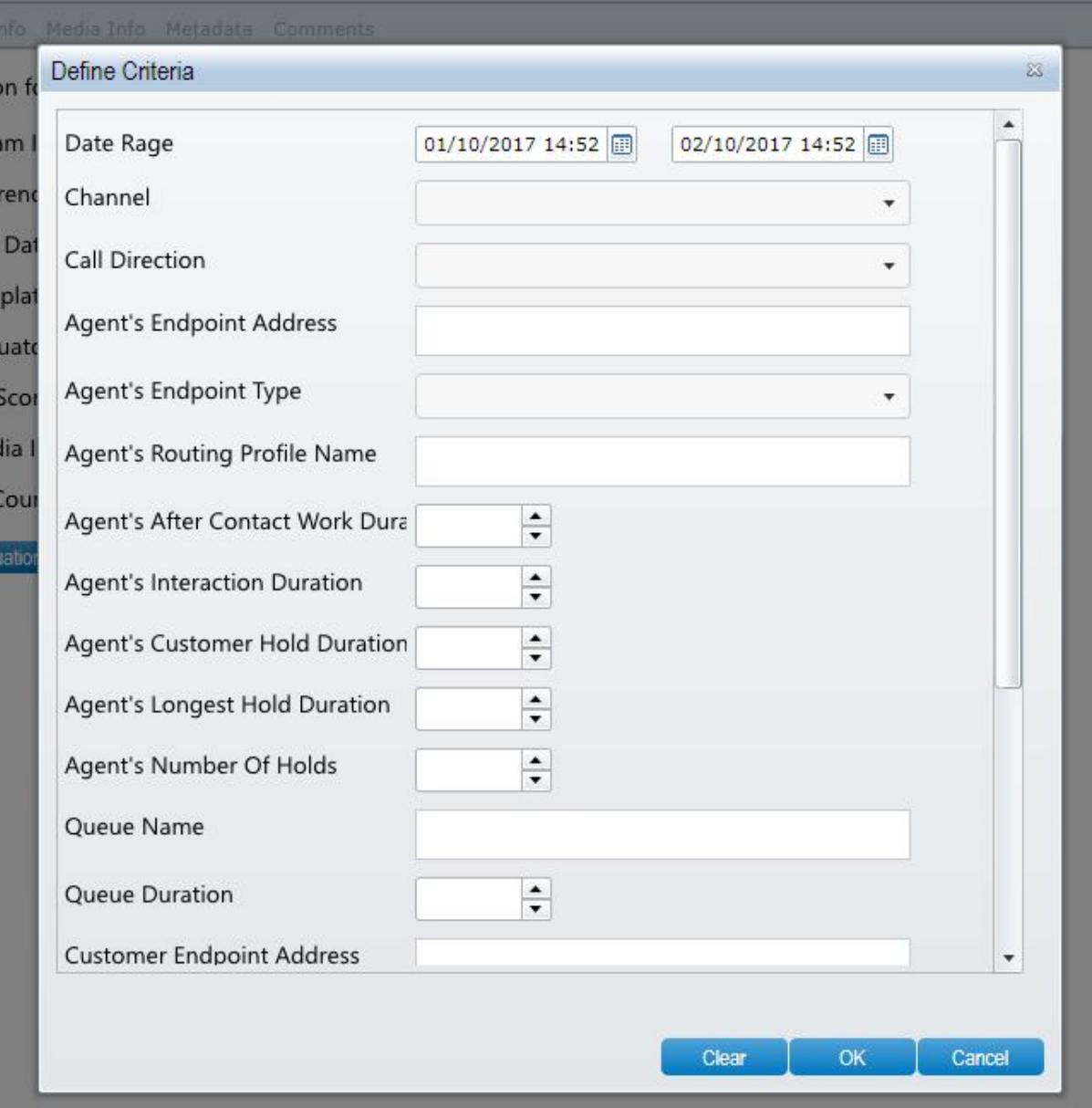


Select an agent and you will observe that the New button has become enabled. Now press the **New** button. This will take you into the Evaluation Form:



The screenshot shows the Qualtrak Performance Center interface. At the top, there is a navigation bar with links for Home, Dashboard, Performance Center (selected), Template Designer, and Reports. The user's name, Garrard Kitchen, is displayed in the top right corner. Below the navigation bar, there is a breadcrumb trail: < Back to Evaluations. The main content area is divided into several sections. On the left, there is a 'Search Media' button and a 'Media' section. The central part of the interface is an 'Evaluation Info' form with the following fields: Evaluation for (Garrard Kitchen), Team ID (Team 1), Reference (Kitch/17/10/1), Evaluation Date (02/10/2017 14:51:37), Template (Soft Skill Behaviours S), Evaluator (Garrard Kitchen), Score, Media ID, and Media Count. A 'Start Evaluation' button is located at the bottom of the form. The right side of the interface has tabs for Evaluation Info, Media Info, Metadata, and Comments.

To find a call to playback, press the **Search Media** (top left) link to get the search overlay up:



Define Criteria

Date Range: 01/10/2017 14:52 02/10/2017 14:52

Channel

Call Direction

Agent's Endpoint Address

Agent's Endpoint Type

Agent's Routing Profile Name

Agent's After Contact Work Dura

Agent's Interaction Duration

Agent's Customer Hold Duration

Agent's Longest Hold Duration

Agent's Number Of Holds

Queue Name

Queue Duration

Customer Endpoint Address

Clear OK Cancel

Next, select / enter search criteria then press the **OK** button

Search Media Save and Close Save and Continue Cancel Reject Media Public

Interpretation

Attributes Evaluation Info Evaluation :: Kitch/17/10/1 :: Soft Skill Behaviours Standard :: 02/10/2017 15:14:08

- * Use of voice
- * Use of language
- * Is Focussed
- * Listening
- * Building Rapport
- * Going the extra mile

Media 

Evaluation Info	Media Info	Metadata	Comments
Recording Id			49577149305215034887767122157701873575500398677622521858.0
Agent Username			garrard
After Contact Work Duration			116
After Contact Work Start...			9/22/2017 3:00:44 PM
After Contact Work End Timestamp			9/22/2017 3:02:40 PM
Agent Interaction Duration			13
Connected To Agent Timestamp			9/22/2017 3:00:23 PM
Customer Hold Duration			7
Hierarchy Groups			
Longest Hold Duration			5
Number Of Holds			2
Dequeue Timestamp			9/22/2017 3:00:23 PM
Queue Duration			30
Enqueue Timestamp			9/22/2017 2:59:53 PM
Queue Name			BasicQueue
Agent Connection Attempts			2
Channel			VOICE
Connected To System Timestamp			9/22/2017 2:59:25 PM
Disconnect Timestamp			9/22/2017 3:00:44 PM
Initiation Method			INBOUND
Initiation Timestamp			9/22/2017 2:59:25 PM
Last Update Timestamp			9/22/2017 3:03:47 PM
Transfer Completed Timestamp			
Transferred To Endpoint			

A recording will be loaded into the browser (bottom left) as well as CTR information (right).

End of document