Deploy and setup instructions

Evaluate for Amazon Connect

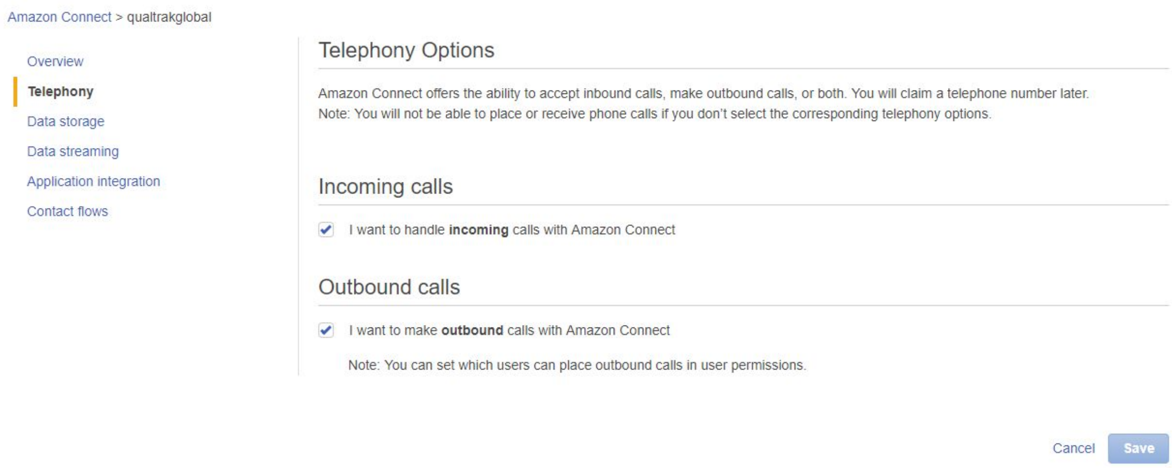
This document is broken down into these sections:

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**

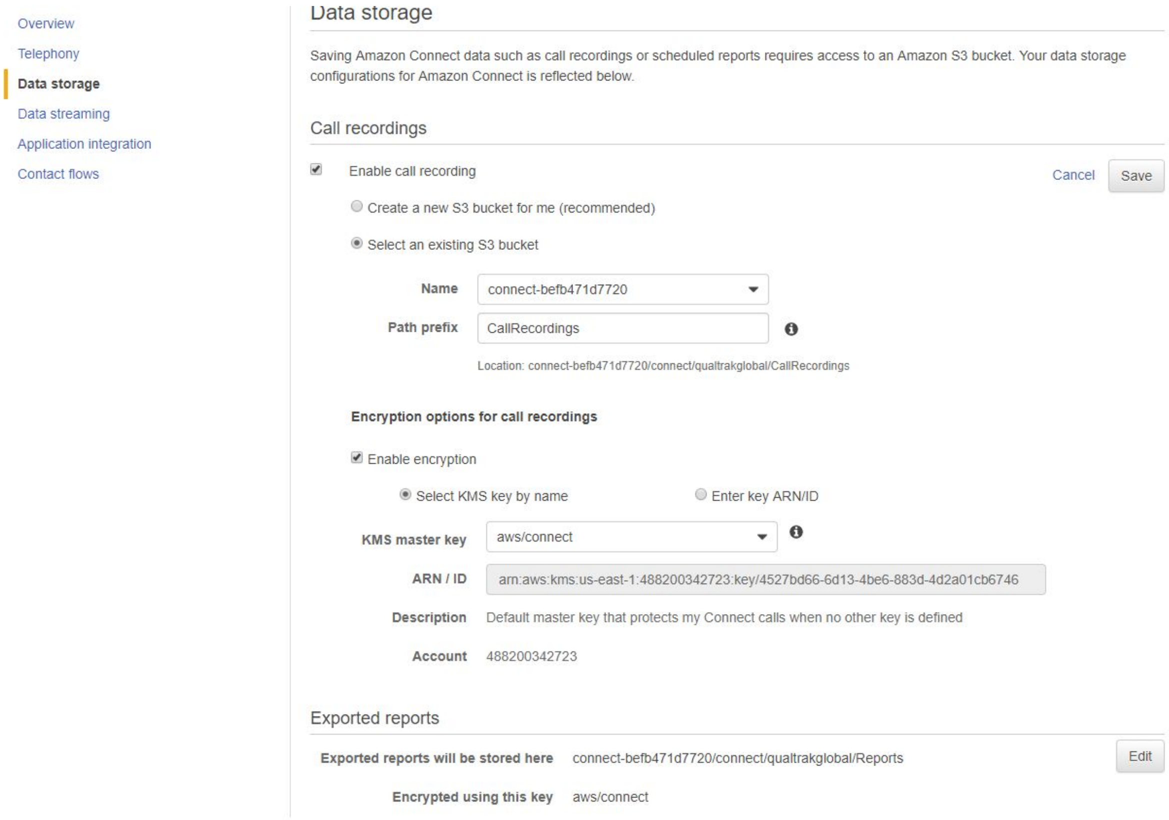
Before you start to deploy the CloudFormation Stack log into the AWS Console and go to your Amazon connect instance that you want to add Quality Monitoring to.

Please select the **Telephony** tab.



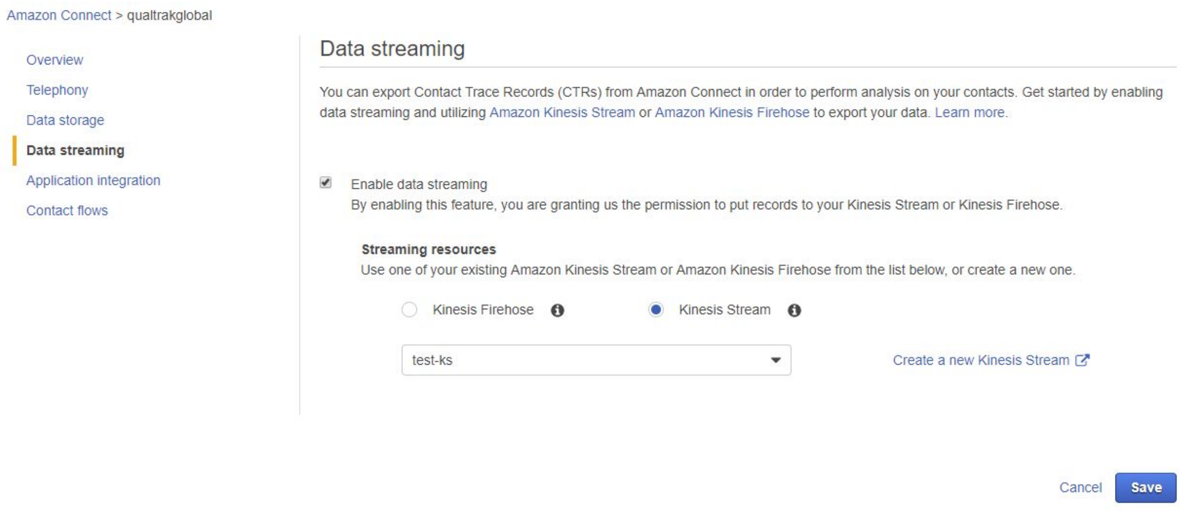
Please ensure that both Incoming and Outbound calls options are checked.

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



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.



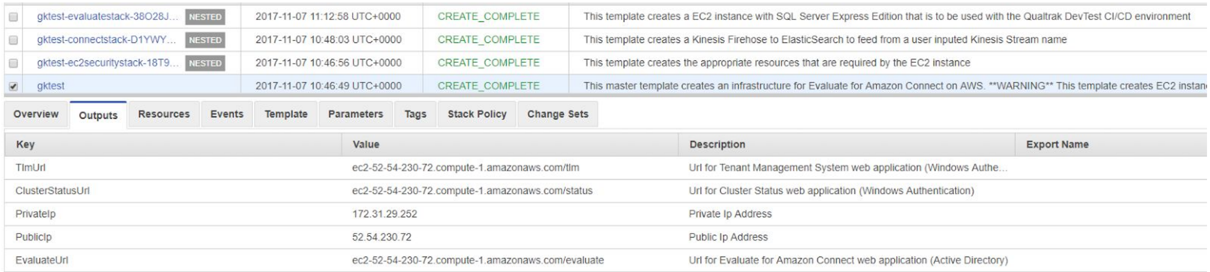
Please make a note of the Kinesis Stream name currently being used to stream the CTRs. In the example above, the stream that is being used is *test-ks*.

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

(2) Create your first Tenant

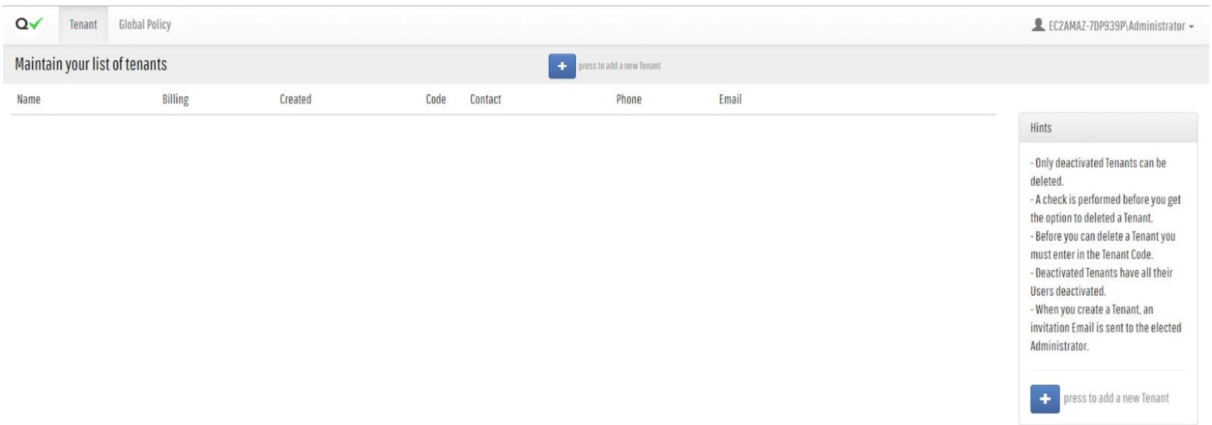
Once deployed, select the Stack entry in the CloudFormation listing (see below's example) and select the Output tab.

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.

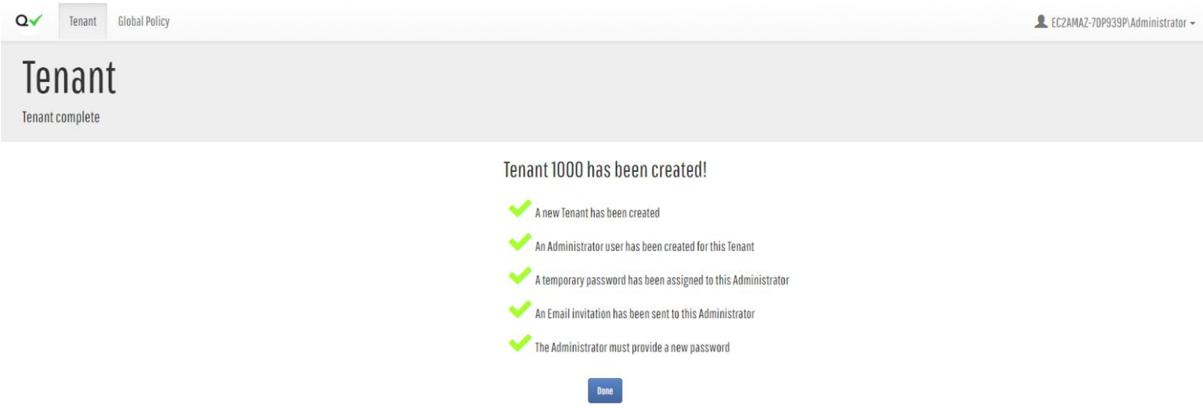


Login into {**TlmUrl**} as local administrator (\Administrator). You can get the local administrator's password for the EC2 instance from AWS Console.

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



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:



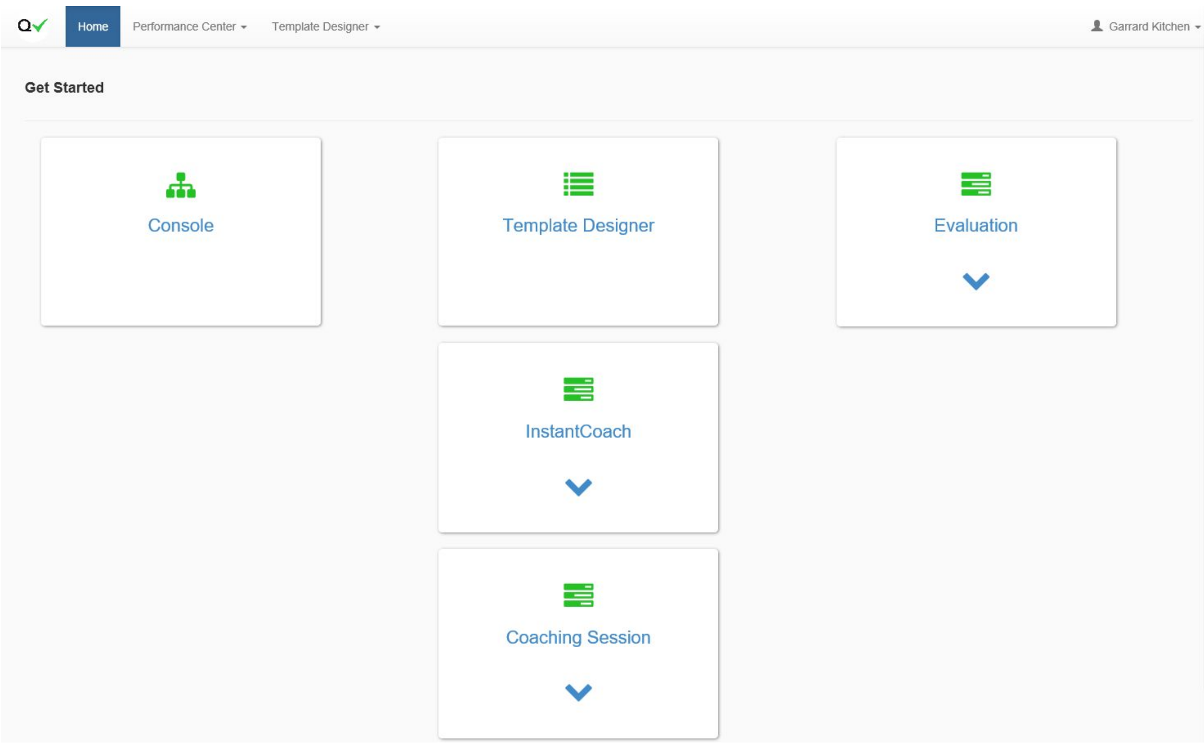
Press **Done** to return to the Tenant listing page.

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

(3) Create your Tenant hierarchy

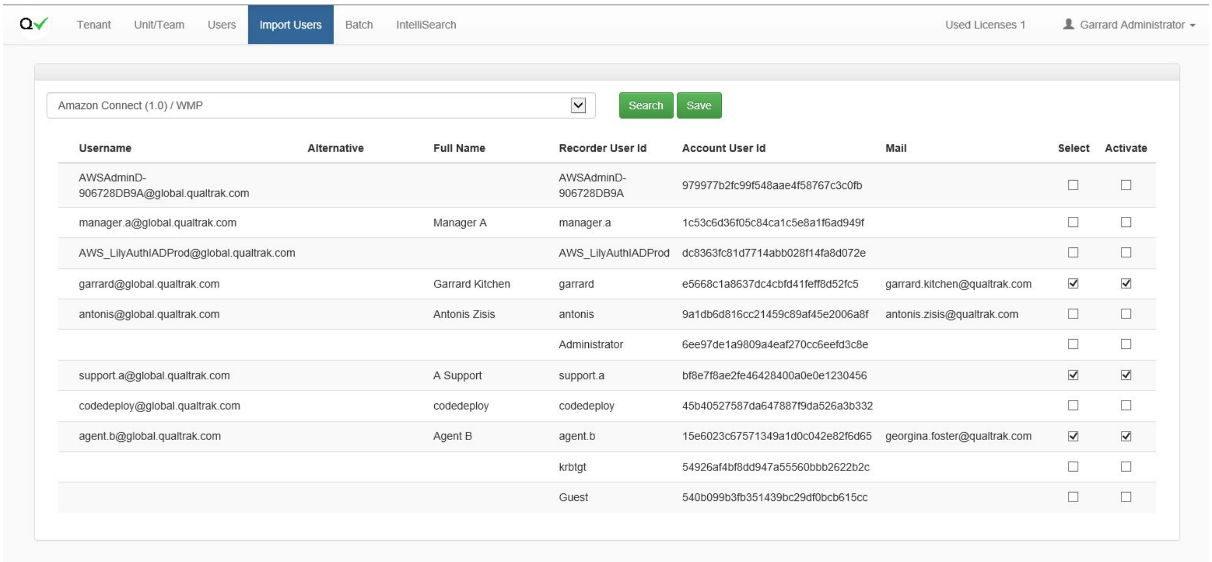
The Url to use to access Evaluate for Amazon Connect can be found in the CloudFormation stack Output tab. The field {**EvaluateUrl**} contains the endpoint for this web application.

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:



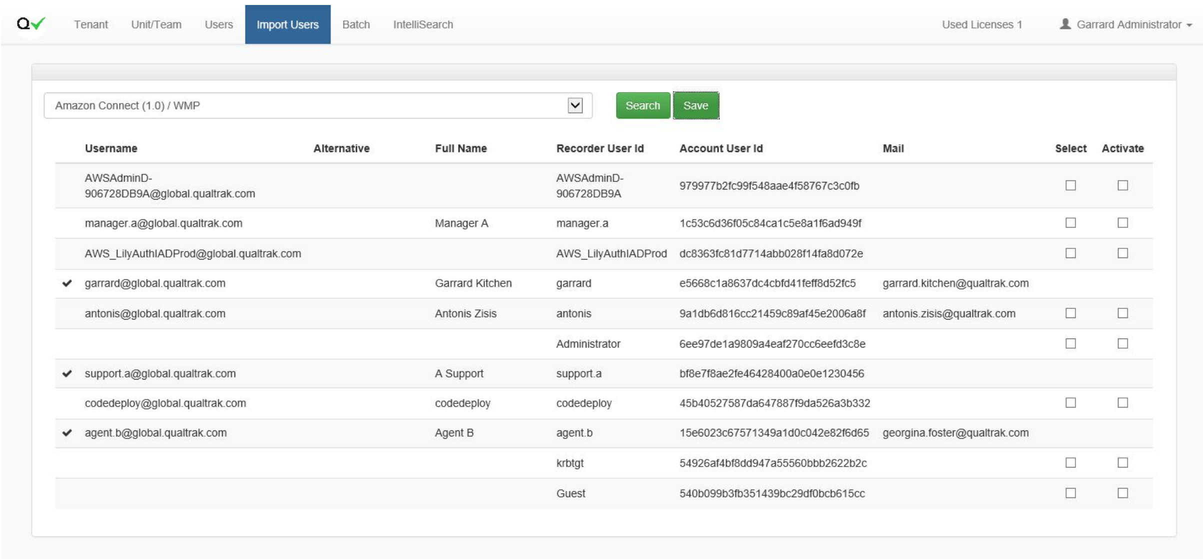
To import users (including agents) navigate to Console > Import Users > Select **Amazon Connect (1.0) WMP** from dropdown > Search.

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



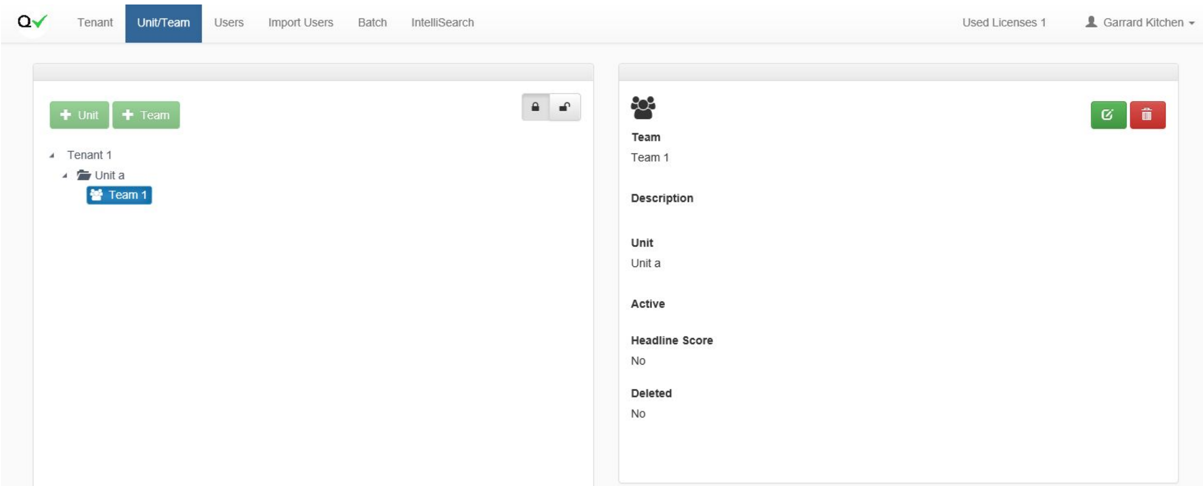
Username	Alternative	Full Name	Recorder User Id	Account User Id	Mail	Select	Activate
AWSAdminD-906728DB9A@global.qualtrak.com			AWSAdminD-906728DB9A	979977b2fc99f548aae4f58767c3c0fb		☐	☐
manager.a@global.qualtrak.com		Manager A	manager.a	1c53c6d36f05c84ca1c5e8a1f6ad949f		☐	☐
AWS_LilyAuthIADProd@global.qualtrak.com			AWS_LilyAuthIADProd	dc8363fc81d7714abb028f14fa8d072e		☐	☐
garrard@global.qualtrak.com		Garrard Kitchen	garrard	e5668c1a8637dc4cbfd41feff8d52fc5	garrard.kitchen@qualtrak.com	☑	☑
antonis@global.qualtrak.com		Antonis Zisis	antonis	9a1db6d816cc21459c89af45e2006a8f	antonis.zisis@qualtrak.com	☐	☐
			Administrator	6ee97de1a9809a4eaf270cc6eefd3c8e		☐	☐
support.a@global.qualtrak.com		A Support	support.a	bf8e7f8ae2fe46428400a0e0e1230456		☑	☑
codedeploy@global.qualtrak.com		codedeploy	codedeploy	45b40527587da647887f9da526a3b332		☐	☐
agent.b@global.qualtrak.com		Agent B	agent.b	15e6023c67571349a1d0c042e82f6d65	georgina.foster@qualtrak.com	☑	☑
			krbtgt	54926af4bf8dd947a55560bbb2622b2c		☐	☐
			Guest	540b099b3fb351439bc29df0bcb615cc		☐	☐

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:

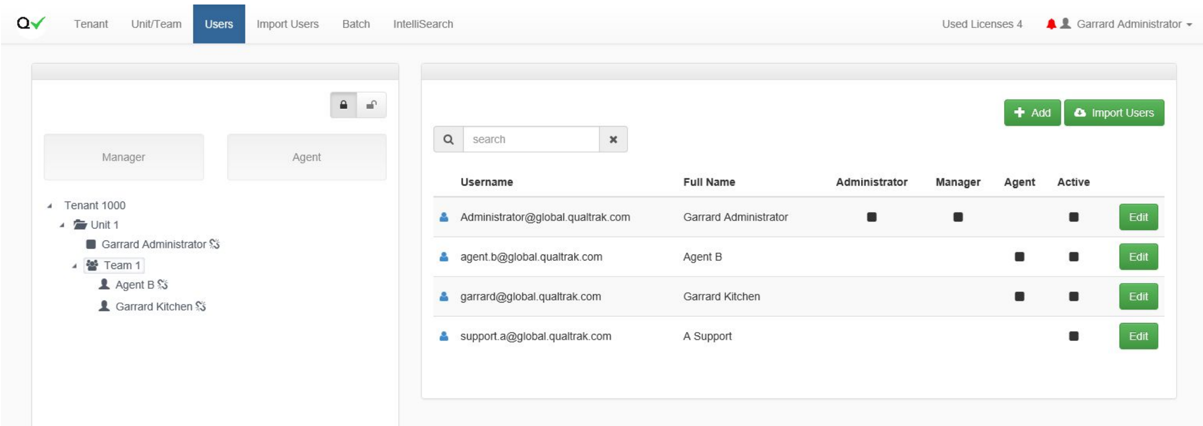


	Username	Alternative	Full Name	Recorder User Id	Account User Id	Mail	Select	Activate
	AWSAdminD-906728DB9A@global.qualtrak.com			AWSAdminD-906728DB9A	979977b2fc99f548aae4f58767c3c0fb		☐	☐
	manager.a@global.qualtrak.com		Manager A	manager.a	1c53c6d36f05c84ca1c5e8a1f6ad949f		☐	☐
	AWS_LilyAuthIADProd@global.qualtrak.com			AWS_LilyAuthIADProd	dc8363fc81d7714abb028f14fa8d072e		☐	☐
✔	garrard@global.qualtrak.com		Garrard Kitchen	garrard	e5668c1a8637dc4cbfd41feff8d52fc5	garrard.kitchen@qualtrak.com		
	antonis@global.qualtrak.com		Antonis Zisis	antonis	9a1db6d816cc21459c89af45e2006a8f	antonis.zisis@qualtrak.com	☐	☐
				Administrator	6ee97de1a9809a4eaf270cc6eefd3c8e		☐	☐
✔	support.a@global.qualtrak.com		A Support	support.a	bf8e7f8ae2fe46428400a0e0e1230456			
	codedeploy@global.qualtrak.com		codedeploy	codedeploy	45b40527587da647887f9da526a3b332		☐	☐
✔	agent.b@global.qualtrak.com		Agent B	agent.b	15e6023c67571349a1d0c042e82f6d65	georgina.foster@qualtrak.com		
				krbtgt	54926af4bf8dd947a55560bbb2622b2c		☐	☐
				Guest	540b099b3fb351439bc29df0bcb615cc		☐	☐

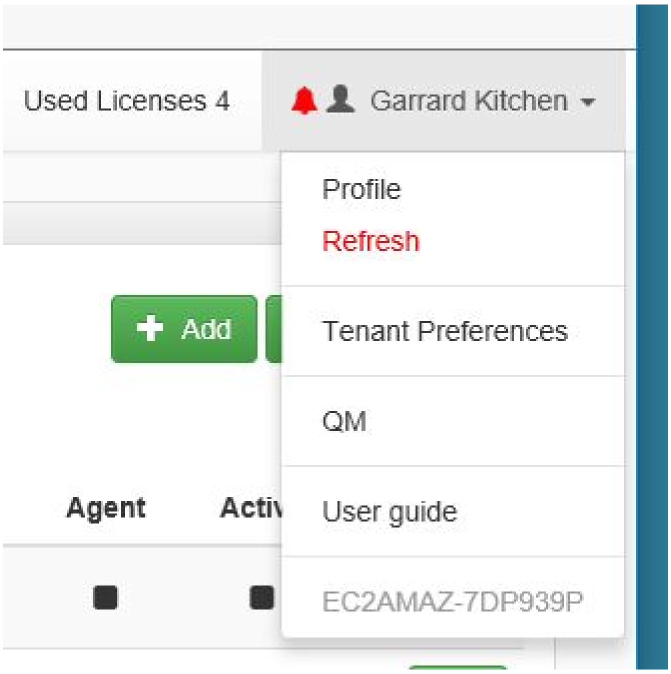
Next, create a Tenant Structure:



Now add users to the structure:



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.

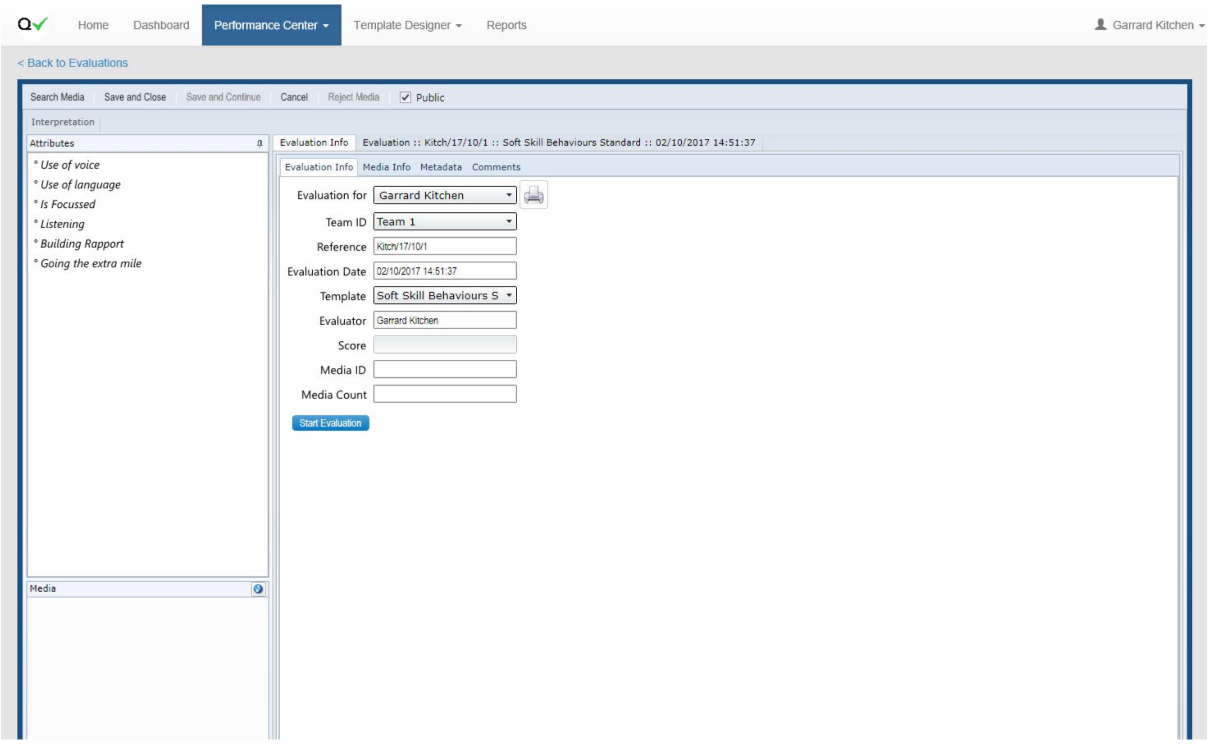
(4) Search for a recording

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

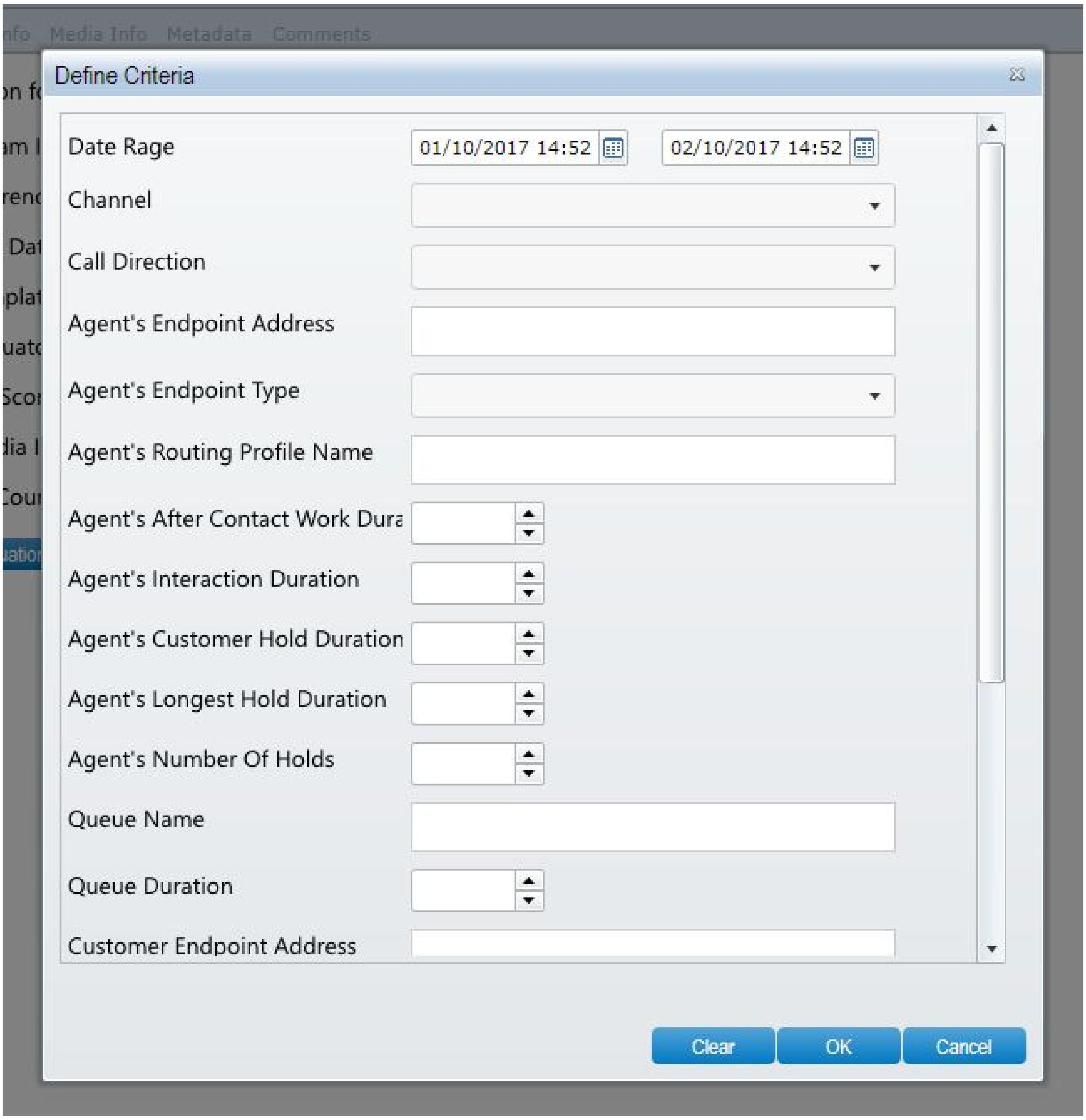
Next, expand the hierarchy tree in left panel until you see an agent icon 

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:

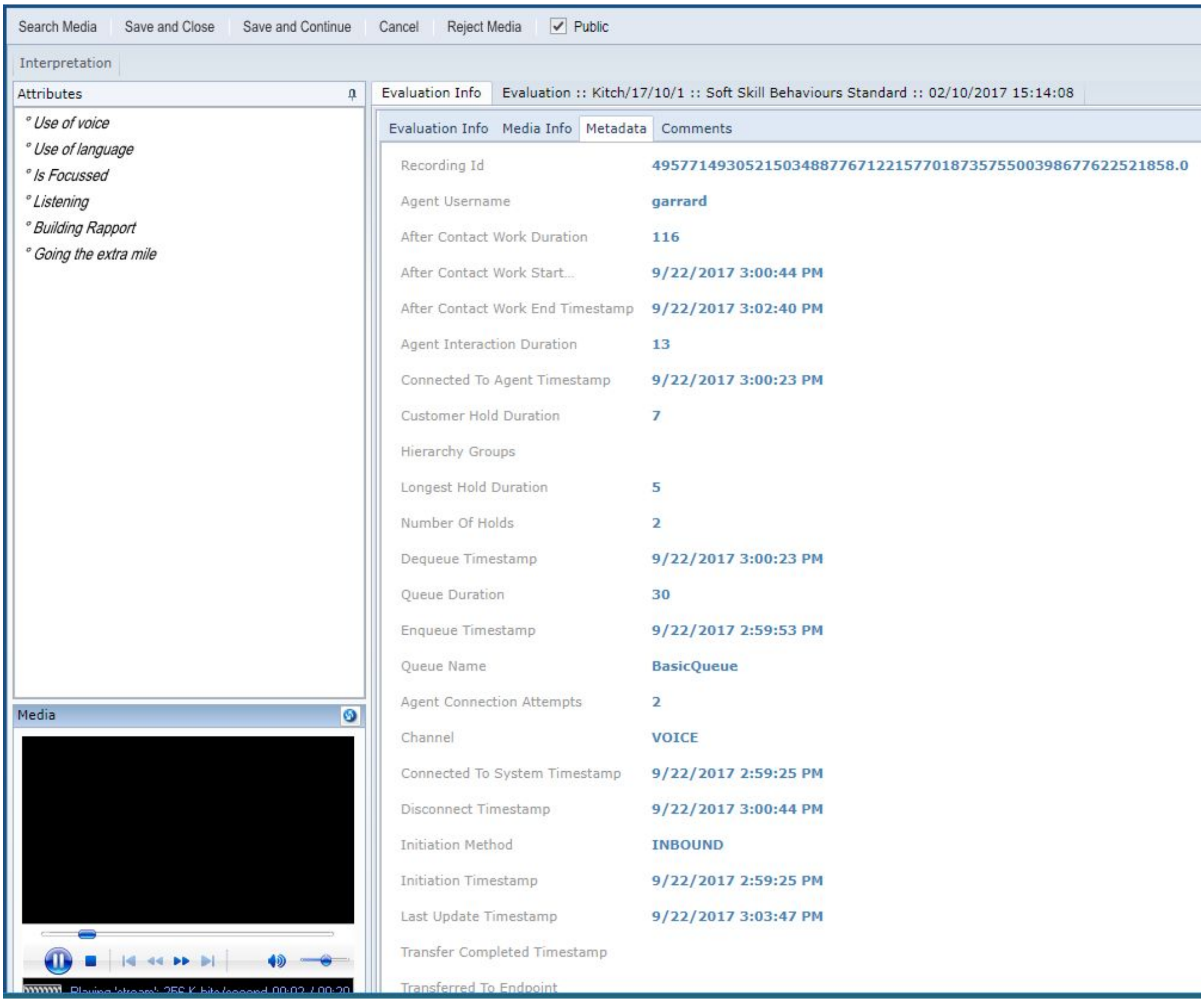
Qualtrak



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



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



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

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