Xima CCaaS

Integration Guide
Includes WFO & WFM

Encore Workforce Optimization/Workforce Management Solution

Encore Version 9.1 or later

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For Xima and Customer Use

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TABLE OF CONTENTS

Introduction

The Xima CCaaS (Contact Center as a Service) Recording Import audio collection method, which is only available in Encore Cloud, works in conjunction with Xima CCaaS's own call recording solution, which may import audio from an associated UC (Unified Communication) platform (RingCentral or Netsapiens) or record Xima's own WebRTC clients. Encore imports the audio and metadata and makes it available in Encore's UI and optionally Encore Speech Analytics.

This integration allows the Encore system to successfully perform the following functions:

- Audio Collection – Import the audio recording that needs to be captured.
- Data Capture – Receive data associated with the call.
- Screen Recording (optional) – Associate the imported audio recording with an Encore Desktop recording. See below for known limitations.
- Speech Analytics (optional) – Process the imported audio using Encore's Speech Analytics platform.

If subscribed to Encore WFM, Encore can optionally send data to Encore WFM by receiving real-time adherence information and retrieving historical data from the Xima CCaaS server. Encore WFM can only monitor UC and WebRTC agents that Xima CCaaS is configured to monitor. **Note: This WFM integration with Xima CCaaS does <u>not</u> monitor real-time or historical data from chat or email sources.**

Known limitations:

- Screen recording is limited to Desktop Recording.

NOTE
When a call is placed on hold, the screen will continue to record and the audio will be out of sync by at least the hold time or accumulated hold times, if multiple hold events take place. As a workaround, we suggest training agents to mute the call vs. holding the call, when this is possible.

- No call event markers are available. i.e. Hold, transfer, conference.
- Recording file format is limited to G.711 Mono wav (UC recordings) or G.711 Stereo wav (WebRTC recordings).
- Cannot use ePause, Telephonic Signature or other WebAPI based tools that require Encore to be recording an active call.
- Related Call lookup is limited to how Xima CCaaS handles various call scenarios. If Xima CCaaS associates multiple recordings under a single Call ID, then Encore will consider these calls related. If CCaaS breaks the recordings up into multiple Call IDs, then Encore cannot relate the calls.
- Xima CCaaS does not provide a call recording for internal calls between two WebRTC client-based agents, therefore Encore cannot capture this interaction. CCaaS does provide recordings when two WebRTC agents are in a consultation call for a transfer.

Supported Data Capture

The following is a list of the supported data elements that can be collected with each recording. Not every element is applicable for each call. For a description of each data element, refer to "Appendix 1: Glossary" on page 12.

- Account Codes
- Agent Login ID
- ANI
- Call Direction
- Call Start/End Time
- Call ID
- Calling Party
- Call Type
- Caller ID
- Caller Location

- DNIS
- Extension
- Final Group
- Initial/Final Skill
- Initial/Final Tag
- Other Party Name
- Other Party Number
- Receiving Party
- Recorded Party Name

- Recorded Party Number
- Recording ID
- Xima Call ID

Supported Recording Features

Screen Recording

Encore's integration with Xima CCaaS is only able to support Encore's Desktop Recording method for making screen recordings of agent desktop PC's. Desktop Recording is a method where the agent's PC is continuously recorded while the agent is logged into the PC. For this to work successfully, the Encore server, the agent's desktop PC and the UC/CCaaS must have their clocks in sync. Generally, all systems will be synchronized to an internet time source, so this should not be a problem, but please ensure that agent PC are having their clocks synchronized.

NOTE
Because audio and screens are being recorded independently from one another, when a call is placed on hold, the screen will continue to record, and the audio will be out of sync by at least the hold time or accumulated hold times if multiple hold events take place. As a workaround, we suggest training agents to mute the call vs. holding the call, when this is possible.

File format

- When Xima CCaaS is importing recordings from a UC system, the imported audio file will be a G.711 Mono Wav file.
- When Xima CCaaS is recording its own WebRTC client, the imported audio file will be a G.711 Stereo Wav file.

Software Requirements

SYSTEM	SOFTWARE REQUIREMENTS

Xima CCaaS	• For Encore WFO, each agent to be recorded by Encore requires:
	   ○ 1 **Voice Agent** license
	   ○ 1 **Xima Quality Management** license
	• If subscribed to Encore WFM, each agent to be monitored requires:
	   ○ 1 **Office Phone User** (or higher) license
	   ○ 1 **Xima Workforce Management** license
	• If subscribed to Encore Speech Analytics, for each agent:
	   ○ 1 **Xima Speech Analytics** license

Encore system	• Encore Cloud 8.6 or later
	• For Encore WFO:
	   ○ 1 Interaction Analytics license per configured recorded agent
	• If subscribed to Encore WFM:
	   ○ 1 Encore WFM agent license per WFM scheduled agent

Prerequisites

Verify License

Before proceeding, verify the CCaaS system has a Xima Quality Management license and the appropriate number of Voice Agent licenses in place to support the number of agents you need to record. Refer to your Xima CCaaS documentation for any additional requirements.

Configure the UC system for recording

Skip this section if Xima CCaaS is not importing recordings from an associated UC system.

Reference the Xima CCaaS installation documentation and the UC system's documentation on the steps required to enable call recording on the UC. All recorded users must first be configured in the Xima CCaaS system. If Xima CCaaS cannot record a user, Encore cannot import the recording. Verify that the Cradle to Grave reports can play back a recording made on the UC system.

Verify the necessary reports are available

Encore needs two report templates and one Realtime metric to be in place on the Xima CCaaS system to make queries for call recordings and their associated call data, as well as acquire real-time and historical reports for Encore WFM. Be sure **Inbound Call Service Level** reports are available as System reports and that the **Agent State** Realtime metric is available in the Agent metric category.

If specifically requested, be sure the **Recorded Call Details** report is also available. This is typically not needed.

Gather the list of recorded user extensions to be imported

Please gather a list of all extensions whose recordings you would like Encore to import.

NOTE
When a new recorded user is added to Xima CCaaS, which is intended for Encore import, this user must also be added to Encore so that it knows to collect the recording and metadata.

Gather the Xima CCaaS URL

The Encore Xima CCaaS Recording Import integration needs to communicate with Xima CCaaS using the same URL as the customer's web portal and what the Xima CCaaS Desktop app uses. Typically, this will be **https://<customer specific name>.xima.cloud**.

Please provide your DVSAnalytics Project Manager or Installation Tech with this URL.

Configure Xima CCaaS for Recording Import

Configure Users for Recording

As previously mentioned, this guide assumes that Xima CCaaS is already configured to record users. No guidance is provided here on how to accomplish this, rather we refer you to the Xima CCaaS documentation to complete these steps for each recorded user.

Configure Service User

The Encore Xima CCaaS Recording Import integration needs an Xima CCaaS Service User to authenticate and access the server's data. Follow these steps to create the Service User.
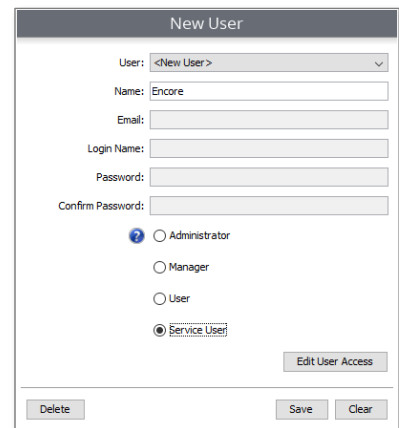
NOTE
If you will also be using Encore WFM, this Service User can be used for both Encore Xima CCaaS Recording Import and for Encore WFM.

CAUTION
This Service User must be for the exclusive use of Encore WFO/WFM. No other apps should use this user.

1. Login to the Xima CCaaS Desktop application with a user that has Administrator privileges.

2. Navigate to **User Management->User Accounts**.

3. In the **User field**, select **New User**.

4. In the **Name** field, use the recommended name of **Encore**, or a username of your choice.

5. Select the **Service User** radio button at the bottom and click **Save**.

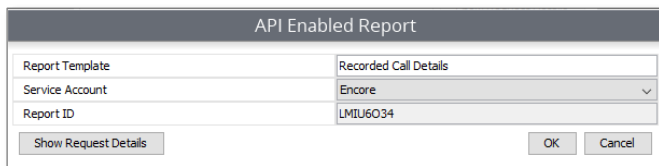## Acquire the Service User's Authentication Key

1. Navigate to **API Enablement > Service Users**.

2. Select the Service User you created in Configure Service User above and click **Edit**.

3. Copy the entire string that's displayed in the **Authentication Key** field. This is a long string that will end with **=**.

4. Provide this string to your DVSAnalytics Project Manager or Installation Tech.

Configuring Historical Data API for Recorded Call Details

Only follow these steps if specially requested. The **Recorded Call Details** report is typically not needed.

1. Login to the Xima CCaaS Desktop application and navigate to **API Enablement > Historical Data Access**.

2. In the *Report Template* field, select **Recorded Call Details**.

3. In the *Service Account* field, select the Service User you created above.

4. Make note of the **Report ID** field's value, as this will need to be provided to your DVSAnalytics Project Manager or Installation Tech.

5. Click the **Show Request Details** button and verify that *Report Output* is set to **JSON**. Click **OK** to exit. **Note**: The *Report Timeframe* setting doesn't matter since this is only used as a template and Encore will use its own parameters when making the query.

6. Click **OK** to save.

API Enabled Report	
Report Template	Recorded Call Details
Service Account	Encore
Report ID	LMIU6O34
Show Request Details	OK Cancel

Provide DVSAnalytics the required information for recording import

Please provide your DVSAnalytics Project Manager or installation Technician the following information:

- List of user extensions whose recordings Encore should import.

- The **Xima CCaaS URL** – See Gather the Xima CCaaS URL on page 6.

- The **Authentication Key** for the Service User that was created for Encore. – See Acquire the Service User's Authentication Key on page 7.

- If specifically requested, the **Report ID** for the API Enabled Historical Data Report for Recorded Call Details. – See Configuring Historical Data API for Recorded Call Details on page 8.

Configure Xima CCaaS for Encore WFM (optional)

The following steps are general guidance to help prepare a Xima CCaaS tenant for integration with Encore WFM.

Verify Licenses

Before proceeding, please verify that the customer's Xima CCaaS tenant is licensed with the following for each WFM monitored agent:

- 1 Office Phone User (or higher) license
- 1 Xima Workforce Management license

Configure the customer's tenant for Encore WFM

DVSAnalytics requires the following to have been configured or created on the customer's tenant:

- A user created for the exclusive use of Encore WFM that is of type **Service User**
- An **Authentication Key** for the above service user
- An **API Enabled Realtime Metric**, with the following set:
  - **Metric Category** = Agent
  - **Realtime Metric** = Agent State
  - **Category Selection** = The list of all agents that Encore WFM needs to monitor

NOTE
When there are changes to the list of agents that need to be monitored, the **Category Selection** must be edited to add/remove agents as appropriate, and the changes saved. The Encore WFM adapter will pick up any changes <u>the following day</u>.

  - **Service Account** = The name of the Service User created above
- An **API Enabled Historical Report** from the **Inbound Call Service Level** report template, with the following Request Details set:
  - **Group** = List of all Groups and/or Skills that this report should monitor (Please provide the exact names as shown)
  - **Summarize Report** = False
  - **Report Output** = JSON

Provide DVSAnalytics the required information for Encore WFM

DVSAnalytics will need the following information for the customer's Xima CCaaS tenant:

- The customer specific Xima CCaaS URL
- The time zone selected for the customer's tenant
- The Service User's Authentication Key. This is the same key as created for Encore's Recording Import.
- The API Enabled Report for Historical Data's
    - Report ID
    - The list of Groups/Skills that this report is monitoring. Please provide the exact names as shown in the Group parameter
- The list of Reason Codes for DND – The reason code must be the exact string that Encore WFM will receive. These can be provided later in the implementation process if they are not currently available
- If a custom report template is in use, the column names as indicated in the Custom Reports section below.

Note: DVSAnalytics does not need the Report ID for the Realtime Metric, as it's acquired via the API.

Custom reports (optional)

For most implementations, the system provided **Inbound Call Service Level** historical report template provides Encore WFM with the required information. If your WFM needs require that you track other call types for your agents, such as outbound calls or internal calls, a custom report template may need to be used.

Your DVSAnalytics Project Manager or Installation Tech will need to know the report's column names so they can ensure the WFM adapter is able to query the data correctly.

If possible, please use the following column names:

- Minutes
- Calls Presented
- Calls Answered
- Calls Abandoned
- Avg Call Duration

If the above column names are not used, please provide your DVSAnalytics Project Manager or Installation Tech the column names that contain the equivalent data.

- The custom historical report's column name, which shows the interval data. Typically, the **Minutes** column.
- The custom historical report's column name, which shows the data for calls offered/presented during the interval period. Typically, the **Calls Presented** column.
- The custom historical report's column name, which shows the data for calls answered/handled during the interval period. Typically, the **Calls Answered** column.
- The custom historical report's column name, which shows the data for calls abandoned during the interval period. Typically, the **Calls Abandoned** column.
- The custom historical report's column name, which shows the data for the average duration of calls during the interval period. Typically, the **Avg Call Duration** column.

Export Historical Data Prior to Encore WFM Production (Optional)

Encore WFM requires historical data to make its forecasts. Once the adapters are properly configured and running, there is a delay in the ability to create the forecasts as Encore WFM needs access to more historical data than it has been able to collect. To get Encore WFM up to speed more quickly, we usually ask that additional historical data be provided. To provide this additional historical data, please use the guidance in this section.

1. Login to your Xima CCaaS web portal and navigate to the **Reports->My Reports** page.
2. While on the reports page, locate **Inbound Call Service Level** and click on the name.
3. The configuration screen will open, or if the report was previously run, click the **Configure** button.
   a. In the **Report Date Range** field, select the desired date range.
   b. In the **Rows (Time)** field:
      - enter "15" into the first field
      - select "Minutes Per Row" from the dropdown
   c. In the **Group** field, select the applicable groups/skills for which you need performance data.
   d. Click **Apply**.
4. Click **Apply** again.
5. The report will generate
6. Click **Download** at the top right.
7. Select **XLS** from the **Select File Format** dropdown menu.
8. Leave **Summarize Report** as **No**.
9. Click **Download** to download an XLS file containing the historical data.
10. Provide this XLS file to your DVSAnalytics Project Manager or Installation Tech.

Appendix 1: Glossary

abandoned call

An incoming call which is answered by the ACD but terminated by the caller before it is answered by an agent.

Account Codes

Acquired from the Xima CCaaS system. If used, allow you to report on who your agents are speaking to, and for which reasons.

ACD

Automatic Call Distributor. An application that answers calls and directs them to a predetermined queue, or line, of waiting calls. In most cases, the ACD ensures that the first call in is the first call answered. It also determines which agent receives a call based on predetermined criteria such as idle time or availability and generates reports on call volume and distribution.

ACD number

This is the equivalent of the Directory Number (DN) where the call originated.

agent

A person who handles phone calls. Other variations include operator, attendant, representative, customer service representative (CSR), telemarketer, phone sales representative (TSR), and so on.

agent login ID

The recorded user's ID, in the format <name>(extension).

ANI

Calling Party Number, this value shows the phone number associated with the call initiator.

- For inbound calls, this shows the phone number (provided by the service provider) that is associated with the calling party.
- For outbound, internal, and inter-site calls, this shows the extension of the calling agent.

automated attendant

A voice processing system that answers calls with a recording and then enables callers to press touch-tone buttons to navigate through a menu system to a person, department, or voice mail.

call direction

- When the Xima CCaaS call Direction is "Inbound", Call Direction will be "Incoming".
- When the Xima CCaaS call Direction is "Outbound", Call Direction will be "Outgoing".
- When the Xima CCaaS call Direction is "Internal", Call Direction will be blank.

call ID

The Xima CCaaS Call Key, a generated GUID.

call record

An entry in a database that holds the data associated with a call.

call type

- When the Xima CCaaS call Direction is "Inbound" or "Outbound", Call Type will be "External".
- For all other call direction's, the Call Type will be "Internal".

call start/end time

These values shows the date and time in preferred time zone that the given call started/ended. It may not be the same as when the recording started.

Caller ID

The caller ID that the phone system associated with this call.

Caller Location

If provided, shows the name of the city and state/province/country from which the external party is calling or receiving the call.

calling party

The recording's calling party.

DNIS

Dialed Party Number, This shows the first phone number that was dialed to initiate the phone call.

- For internal calls, this will be the extension number that was dialed.
- For inbound calls, this will be the agent's extension. It is the number dialed by the queue to reach the agent.
- For outbound calls, this will be the number that the agent dialed.

extension

The recorded user's extension number. It is the number inside the last () of the Agent Login ID or the ID shown in the Xima CCaaS Users list in Phone or Agent Licensing.

external calls

In these calls, the calling or called parties are outside the PBX.

final group

The last Xima group that was associated with the call.

inbound

Calls which are received/answered by a recorded party.

internal calls

In these calls, the calling and called parties are extensions on the PBX.

other party name

- For inbound external, this will be set to the Xima Caller ID.
- For outbound external, this will be blank.
- For all internal calls, this will be set to the other internal party's name.
- For all outbound calls that result in a conference call, this will be blank.

other party number

- For inbound external calls, this will be set to ANI.
- For outbound external calls, this will be set to DNIS.
- For all internal calls, this will be set to the other internal party's extension.
- For all outbound calls that result in a conference call, this will be "conference".

other party number

Number of the other party on the line with the person being recorded; if external and incoming call, this is an ANI. If a call is transferred from Phone A on PBX Node 1 to Phone B on PBX Node 2, the Other Party Number for Phone B could be Phone A instead of the caller.

outbound

Calls which are placed by a recorded party.

PBX (PABX)

Private (Automated) Branch Exchange. The phone system to which the office phones are connected.

receiving party

The recording's receiving party.

recorded party name

The agent's name.

recorded party number

The agent's extension.

recording

The audio recording or screen recording associated with a single phone call or segments of a conversation that may have holds, transfers or conferences.

Recording ID

A value that will be <Xima CCaaS generated recording key>~<Recorded user name(extension)>.

related call lookup

A customer's experience in a call center may include multiple recordings even though the customer was on one, continuous call. This feature shows recordings that are related to the selected recording.

station

A phone connected to the PBX.

skill

A skill is a group of abilities necessary to answer a specific type of contact. Encore captures the Xima CCaaS initial and final skill.

Tag (initial / final)

The initial or final Xima CCaaS tag that was associated with the call.

trunk

The connection between the phone company and the PBX that carries incoming calls.

user extension

For agents to receive calls, they log into their phones with their user extensions. A user extension may or may not be the same number as a phone's base extension.

Xima Call ID

The unique ID that Xima assigned to this call.