CXone Performance Management

Standard IEX Integration

Solution Description

This is a turnkey integration that pulls the metrics outlined below from IEX into the CXone Performance Management system. This will allow you to view standard IEX metrics in the same dashboards and wallboards as ACD metrics, as well as other systems, integrated within the CXone Performance Management tool.

Description of Services

Deliverables:

1. Establish connection to additional database using SFTP
2. Build stored procedure and standard metrics from database
3. UAT (User Acceptance Testing)

Completion Milestones:

1. Connection feeds turned on by NIC
2. Pre-defined metrics built
3. Customer UAT (User Acceptance Testing)

Connection Guidelines:

1. Data feeds must be turned on by the NIC TAM or NIC PM and should do so at the time of a resource request
      - Once the feed is turned on a folder will be created that IEX will post files to
2. CXone Performance Management needs to receive notification that step 1 has been completed and told the name of the folder.
3. CXone Performance Management will then create an SFTP import to pull this file and push it into our staging tables.

Reporting Guidelines

1. All IEX reports are for historical data only
2. Imports scheduled to run every 5 hours for current day data and can NOT be altered
3. 7-day lookback scheduled to run 1 time per day
    - Report will only include updates customer has made within the past 7 days.
    - Any change made within IEX dating back farther than 7 days will not get updated within the CXone PM tool.
    -If the change is required to be updated within CXone PM, it will require PS hours and the reimport will need to be
    re-uploaded to the SFTP and processed.

Metric Guidelines

1. Only metrics listed below will be included as "standard" for integration completion
      - Variations of standard metrics can be made available to customers at no additional charge
      - Examples: In Adherence Time for a specific state such as "open, meeting, break, etc"
2. Metrics will be assigned to the current hierarchy in client's environment as applicable. I.E. Adherence metrics will be viewable by Agent, Team, etc., but not by Skill.
3. Any additional metrics required will be considered "custom"
      - Custom metrics will need to be scoped out by a database specialist
      - Custom metrics will require PS hours to be completed
      - Custom metrics will NOT begin until the standard integrations is completed and accepted by the customer

Limitation: Shrinkage metrics are NOT available for this integration, even as custom.
- Shrinkage metrics include any time or states where an agent is not in the office.
- Examples: Vacation Time, FMLA, Sick Leave, Jury Duty, etc.

NICE inContact Responsibilities

1. Assign named Professional Services resources to the implementation team for this engagement to include the following:

Project Manager
- Coordinate and manage NIC resources that work with Customer Project Manager and CXone PM team.
- Turn on IEX Feeds for CXone PM to retrieve data.
- Provide reports from IEX to CXone PM to allow validation to be completed
- Issue communication on project status

2. Finalize project timeline for real-time report templates using custom dashboard modules.

3. Support Customer in User Acceptance Testing in the Performance Dashboard

Customer Responsibilites

1. Identify internal Subject Matter Experts (SMEs) to participate in the implementation project, to include:
- Project Manager to organize required Customer resources necessary to complete requirements definition, perform review of deliverables, and provide sign-off on project deliverables.
- Contact Center Reporting SME to participate in requirements definition and conduct User Acceptance Testing

2. Develop User Acceptance Test plan and cases.

3. Develop test data for User Acceptance Testing.

4. Execute User Acceptance Test cases and provide to NIC written notification describing defects encountered during the UAT process.

5. Provide sign-off on the deliverables and milestones described in this SOW or written notification outlining any deficiencies within five (5) business days of receipt.

CXone Performance Management Responsibilites

1. Assign named Professional Services resources to the implementation team for this engagement to include the following:

Project Manager
- Work with NIC TAM/PM to get feeds turned on
- Present metrics for User Acceptance Testing

Data Architect
- Retrieve and set up connection once folder and feeds are turned on
- Set up integration
- Build standard metrics

2. Build the integration and standard metrics.

3. Conduct integration testing.

4. Conduct validation testing

5. Support Customer in User Acceptance Testing in the Performance Dashboard

6. Respond to defects identified during Customer's User Acceptance Testing.

7. Scope any "custom" metrics that may be requested.

Included Standard Metrics

Metric Name	Abbreviation	Metric Description	SF Object/Field	Notes
Occupancy Time	Cases Created	The number of Cases Created	Case	The amount of time an agent spent working in an attribute
Schedule Time	Cases Closed	The number of Cases Closed	Case: Status	The amount of time an agent was scheduled to be in an attribute

In Adherence Time	In Adherence Time			The amount of time an agent spent In Adherence to their schedule
Out Adherence Time	Out Adherence Time			The amount of time an agent spent Out of Adherence to their schedule
Occupancy %	Occupancy %	Occupancy Time/ Scheduled Time		
Adherence %	Adherence %	In Aherence Time/ Scheduled Time		

Clearview Scoping Acceptance
Clearview Signature:
Printed Name:
Title:
Date: