

**STATEMENT OF WORK (SOW)
FOR
HOUSTON INFORMATION TECHNOLOGY
SERVICES**

**Computer Telephony Interface
(CTI) Licenses**

**Technology Category:
Commodities**

October 8, 2020

**Statement of Work (SOW)
Houston Information Technology Services
Commodities**

INTRODUCTION

Computer Telephony Interface (CTI) licenses are a required component of the 311 Microsoft Dynamics Implementation project. The new City of Houston 311 solution is being designed to equip citizens and employees with new tools to improve productivity and provide a cloud-based, web-enabled, more personal customer and agent experience. CTI embeds call controls directly into Microsoft Dynamics enabling call agents to know who is calling without the need for searches or unnecessary clicks and will allow Agents to take and place calls via a click of a mouse.

This document is intended to provide the City of Houston and the Vendor implementation team with supporting collateral to the Agreement. The details of this document should provide clarity around the project goals and advanced implementation needs

SCOPE OF SERVICES

Vendor will provide the City of Houston with a solution for their agents that will address City of Houston’s high-level goals to enhance customer experience, increase agent efficiency, and provide enhanced dialing capability.

STAGE	DESCRIPTION	Planned Start	Est. Duration
Kick-Off	Introduce project teams; Review SOW & project plan; Confirm scope and timelines. This call includes: <ul style="list-style-type: none"> ● Implementation Overview ● Review of Signed Agreement (SoW) ● Project Planning and defining next steps ● Confirmation of the Project Success Criteria and Value 	Scheduled upon contract execution	1 Business Day
Configuration	Setup Integration with both the CRM & Phone Systems: Configure solution aligned to SOW. These steps include: <ul style="list-style-type: none"> ● Provision Supported Windows VM ● Remote installation of Vendor Cloud Connect Application on VM ● Whitelist IP Address ● Configuration of Cisco UCM as defined below. ● Provision Microsoft Dynamics API user ● Perform test calls to ensure expected normalized call events 	Kick-Off Completed +1 Day	15 Business Days
Validation	Test and validate solution configuration and integration connectivity aligned to SOW	Configuration Completed + 1 Day	2 Business Days

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Training	Admin Training & End User Training; Setup remaining UAT users if required.	Validation Completed + 1 Day	2 Business Days
UAT (*Optional)	User Acceptance Testing performed by a small subset of users to validate solution operability	Training Completed + 1 Day	5 Business Days
Go-Live	Rollout of Vendor solution to remaining users based on total purchased licensing	UAT Completed + 1 Day	1 Business Day
TOTAL ESTIMATED DURATION FOR IMPLEMENTATION:			26 Business Days

Durations are estimated based on assumptions and responsibilities outlined in the SOW. Any delay in completion of Customer Responsibilities, coordination of schedules for meetings or changes in Requirements may result in changes to the above Durations

Feature Pack: Advanced

Integration of Microsoft Dynamics and Cisco UCM to enable the following:

- Primary User Interface = Embedded via CiF

Advanced

- Click to Dial from any Microsoft Dynamics record page
 - Phone numbers must be stored in a format which the phone system can accept and place an outgoing call with. Vendor will not be responsible for data scrubbing, editing and/or translations.
 - Recommended approach is to store phone numbers in e.164 format.
 - Only pass digits within the phone number field. The only non-integer that is passed is a leading plus sign “+”.
 - User Interface (TUI)
 - Inbound + Outbound caller identification
 - Display Phone Number
 - Display Call Duration
 - Display open and completed tasks related to record
 - Ability to create new records within Microsoft Dynamics
 - Ability to associate phone number + call log with existing Microsoft Dynamics record
- Web Services (TWS)
 - Automatic call logging within Microsoft Dynamics for both inbound and outbound calls
 - Logging call notes within Microsoft Dynamics
 - Setting follow up tasks via Natural Language Processing or date picker

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- @Mention team members
- Setting Call Dispositions
- Relating Calls to New or Existing Opportunity or Cases with Microsoft Dynamics
- Ability to launch video conference from Vendor's interface to the following providers:
 - Zoom
 - Hangouts
 - Join.me
- Vendor Environment (Tenant)
 - This SOW only covers deployment to a single production Microsoft Dynamics instance and a single production Cisco UCM environment. If a separate Vendor tenant is required for initial or on-going testing, this will require additional Professional Services.
- Admin + Reporting
 - Ability to administer features on a team basis
 - Vendor Call Analytics Dashboard
 - Support for Microsoft Dynamics team-based reporting
 - Ability to export data as a CSV file

Technical Topography

System	Version	Hosting Location
Microsoft Dynamics		
Cisco UCM	11.5.1.12900-21	Houston Texas

Microsoft Dynamics Data Elements

Supported Data Points

Vendor will save the following data to Microsoft Dynamics

- Call notes
- Call Dispositions
- Direction of Call (e.g. Inbound/Outbound)
- Duration of Call in Seconds (e.g. 780)
- Name of Agent
- Date Stamp of Call

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Supported Entities + Objects

Entities Matched Against:

- Leads
- Accounts
- Contacts

Resources Calls to be Associated to:

- Cases
- Opportunities Log Calls as Tasks

Note that any other standard or custom object, entity or resource not named above would need to be scoped and approved by Vendor in order to be considered supported.

City of Houston Responsibilities

Telephony

Cloud Connect Installation Location

Cloud Connect Host Supporting Cisco UCM Instance	
Country	United States
State	Texas
City	Houston

Cloud Connection Server Requirements

Windows Host Requirements

A windows server or workstation that can be left on and operational 24x7.

- OS Requirements
 - Windows Server 2016 with Desktop Experience (Recommended)
 - Windows Server 2012
 - Windows Server 2012 R2
 - Windows 10
- Processor
 - Modern 4 Core Processor
- .net 3.5 and .net 4.7 must be installed
- Microsoft .NET Framework 4.8 Runtime must be installed
 - For both .NET versions, you do not need any HTTP Activation related items
- Taking a System Image Backup prior to installation (Required)

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- Hardware Requirements
 - 8 GB Memory
 - 30 GB Free Hard Disk Space
- Network
 - Network card (must be on same LAN as PBX, not wireless)
 - Virtual Environments are supported
 - Must have access to the internet
 - Requests from this server to Vendor must have a static facing public IP address (this is not used for inbound routing, only for identification of arriving packets on our end). Most likely, this will be your WAN IP.
- Ports Required
 - 443
 - 3026
 - HTTP: registry.npmjs.org, *.pubnub.com

Cisco UCM Requirements

- It is assumed that only 1 device per extension will be required to be monitored
- A server to host the Vendor Cloud Connect application that is compliant to the agreed upon requirements
- Firmware version of Cisco UCM must be at least 10 or later
- Connectivity to Vendor Cloud Connect:
 - TCP: 2748
- The Cisco TAPI driver for the correct version of Call Manager must be installed manually first upon the Cisco PBX

Cisco UCM Advisories

- In environments leveraging CUBE, external calls may not disconnect for the caller when hanging up via the Vendor UI. Cisco has identified a bug in CUBE with a tentative release date of November 2020. See <https://devnetsupport.cisco.com/hc/requests/4108> for more information.

Cisco Webex Hybrid Call Service is not supported.

External Firewall Access Required

- 54.235.107.161:3026 (outbound)
- events.Vendor.com:443 (outbound)
- *.pubnub.com:443 (outbound)
- *.pndsn.com:443 (outbound)
- *.pubnub.net:443 (outbound)
- *.pubnub.io:443 (outbound)

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Microsoft Dynamics Requirements

- Staging Support and Microsoft Dynamics access
 - API User or Admin user to leverage for reading/writing all metadata back to Microsoft Dynamics object/fields
 - Permissions to read/write to required fields supporting updates and activity history including:
 - First name
 - Last name
 - Phone number specific fields
 - Microsoft Dynamics record ID
 - Notes/comments
 - This user must be provisioned with a Salesforce Professional or greater license
 - Introductions to Microsoft Dynamics architecture resources for planning and scoping of integration options
- IVR/PBX/Microsoft Dynamics admins will be made available to Vendor to assist through the implementation

Supported Browsers

- Google Chrome
- Mozilla Firefox